



ONE System Housing Referral Workflow Toolkit

New Inventory Features

Phase 2: HAT Referrals
November 2022

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Context

Phase 2 of Inventory functionality adds minor changes to the workflow for the buildings with Housing Access (commonly called HAT, or sometimes CAAP PSH) units.¹ See [Buildings Included in Phase 2](#) for a complete list. When all housing programs transition to using Inventory during Phase 3, there will be additional changes to the workflow. For the time being, the only changes to the referral and unit management workflow are those identified below. All other activities in ONE remain the same.

What Inventory Will Do

Inventory in ONE is:

- A new set of tools built into the ONE System;
- A way to track and view open units with more precision and visibility; and
- Information that will help better match clients to the units that fit their needs.

Inventory is not:

- A new platform;
- A property management system;
- A complete overhaul of the ONE System; or
- A new approach to the Homelessness Response System or Coordinated Entry.

Using Inventory in ONE will help with the following:

- Help streamline workflows and better serve clients;
- Remove the need to use the Offline Vacancy Tracker (OVT);
- Provide better and more timely information to HSH and the community about which units are unoccupied, for how long, and why;
- Support reconciliation and communication by being a reliable source of truth; and
- Provide more transparency into the overall housing portfolio.

What is Included in this Toolkit

This toolkit can be used as a guide to the entire housing referral workflow for staff who work in housing sites. It can also be used as separate tip sheets for each task related to unit turnover and client move-in in ONE. Each task has its own tip sheet with an overview, step-by-step instructions, and information on who is responsible for a task, whether the task is new or has changed with the new Inventory functionality, and other helpful hints. You can use the Contents section on the first page to jump directly to any task.

¹ The Henry CoC program is included in Phase 2, as other units in the Henry are a part of the HAT portfolio.



Buildings Included in Phase 2

Agency in ONE	Building Name	Unit Count	Programs in ONE
Abode Services	Hotel Verona	65	Verona – GF
Community Forward SF	Coronado Hotel	65	Coronado Hotel – GF
Conard House	Aranda Hotel	110	Aranda Hotel – HSH Fund
Conard House	McAllister Hotel	80	McAllister Hotel – HSH Fund
Episcopal Community Services	Alder Hotel	118	Alder – HSH Fund
Episcopal Community Services	Crosby Hotel	122	Crosby Hotel – HSH Fund
Episcopal Community Services	Elm Hotel	79	Elm Hotel – HSH Fund
Episcopal Community Services	Henry Hotel	121	Henry Hotel – CoC Henry Hotel – GF
Episcopal Community Services	Hillsdale Hotel	75	Hillsdale Hotel - GF
Episcopal Community Services	Mentone Hotel	68	Mentone Hotel – HSH Fund
Mary Elizabeth Inn	Mary Elizabeth Inn	58	Mary Elizabeth Inn – GF
Tenderloin Housing Clinic	All Star	84	All Star – HSH Fund
Tenderloin Housing Clinic	Boyd Hotel	79	Boyd Hotel – HSH Fund
Tenderloin Housing Clinic	Elk Hotel	86	Elk Hotel – HSH Fund
Tenderloin Housing Clinic	Graystone Hotel	73	Graystone Hotel – HSH Fund
Tenderloin Housing Clinic	Hartland Hotel	134	Hartland Hotel - GF
Tenderloin Housing Clinic	Jefferson Hotel	108	Jefferson Hotel – GF
Tenderloin Housing Clinic	Mission Hotel	241	Mission Hotel – GF
Tenderloin Housing Clinic	Pierre Hotel	85	Pierre Hotel – HSH Fund
Tenderloin Housing Clinic	Raman	84	Raman - GF
Tenderloin Housing Clinic	Royan Hotel	68	Royan Hotel – HSH Fund
Tenderloin Housing Clinic	Seneca Hotel	197	Seneca Hotel – GF
Tenderloin Housing Clinic	Union Hotel	60	Union Hotel – HSH Fund
Tenderloin Housing Clinic	Vincent Hotel	98	Vincent Hotel - GF



Using Rosters to Resolve Any Discrepancies in Imported Data



Use reports to ensure all data is accurate



Both **property managers** and **service providers** are responsible for accurate data in ONE.



All imported data should be reviewed and updated by 12/1/2022.



Pay attention to reviewing appropriate sections for households.

Overview

In preparation for launching Phase 2 of the Inventory project, Property Managers confirmed current unit occupancy in August 2022. That data was imported into ONE to avoid manual association of current clients in housing programs with their unit information. Any client move-ins, move-outs, or unit transfers that occurred after that data was collected are not yet reflected in ONE. Property Managers and Service Providers are responsible for ensuring that all clients are correctly enrolled and associated with the correct unit, and that all unit statuses are accurate. The reporting tools are available to support in this process.

Step by Step

1. Review the **Program Roster** report to ensure all enrolled clients have a unit number association.
 - a. *If a client does not appear on the report, they must be enrolled in the program, then assigned to their unit. See [Accept and Enroll Client in a Program](#) and [Assign a Client to a Unit](#).*
 - b. *If a client appears on the report, but their unit is incorrect, they need to be associated with their current unit. See [Transferring a Client to a New Unit](#).*
 - c. *If a client has “N/A” in the unit column, this could be one of three issues:*
 - i. The client is enrolled in the program, but does not have an assigned unit within their enrollment. See [Assign a Client to a Unit](#).
 - ii. The client is associated with a unit, but does not have a move-in date entered in their enrollment. See Step 6 of [Accept and Enroll Client in Program](#).
 - iii. The client is a member of a household that was not enrolled together. See [Managing Households](#) for instructions on linking clients within households and updating enrollments to accurately represent all tenants within a unit.
2. Review the **Building Roster** report to verify it matches your current tenant list and that all units are properly accounted for. The occupied, available, and offline or inactive units should roll up to the total number of units in a building.



- a. *If a client appears on this report who no longer lives in your building, they need to be exited from the program to also exit them from the unit record in ONE. See [Exit Client from a Program](#).*
 - b. *If a client appears on the report, but their unit is incorrect, they need to be associated with their current unit. See [Transferring a Client to a New Unit](#).*
 - c. *If a current tenant does not appear on the report, they must be assigned to their unit. If the client is not already enrolled in the program, they should be enrolled, then assigned to their unit. See [Accept and Enroll Client in a Program](#) and [Assign a Client to a Unit](#).*
3. Review the **Housing Unit Availability** report to ensure that all current vacant units within your building or agency are represented. For Phase 2, this report should show all units that are not occupied based on their status in ONE, regardless of whether there is a pending referral.
 - a. *If the units listed as available do not match the actual available vacancies in your building, run the **Building Roster** report to reconcile available and occupied units. See Step 2 of [Review Roster Reports for Accuracy](#).*
 4. Compare the available units in the **Housing Unit Availability** report against the number of posted openings. See Step 2e of [Review Roster Reports for Accuracy](#).



Post a Program Opening in ONE



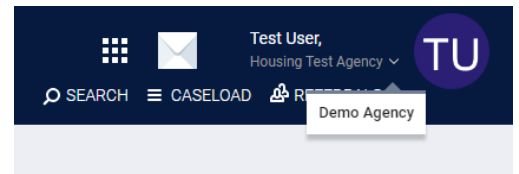
This task is usually completed by *property managers*.

Overview

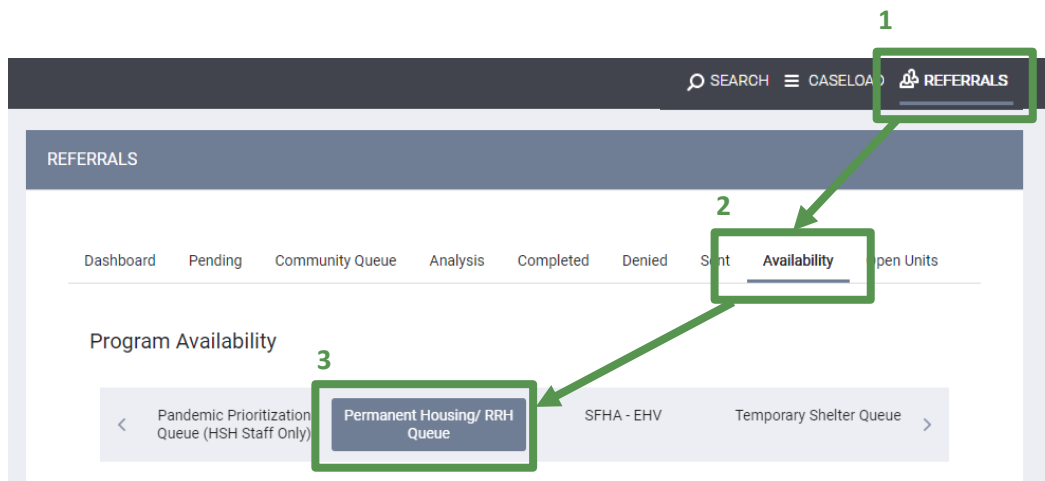
To post a program opening in ONE, under the Availability tab, create a new post to designate the open unit. Include the unit number in the Additional Notes section.

Step by Step

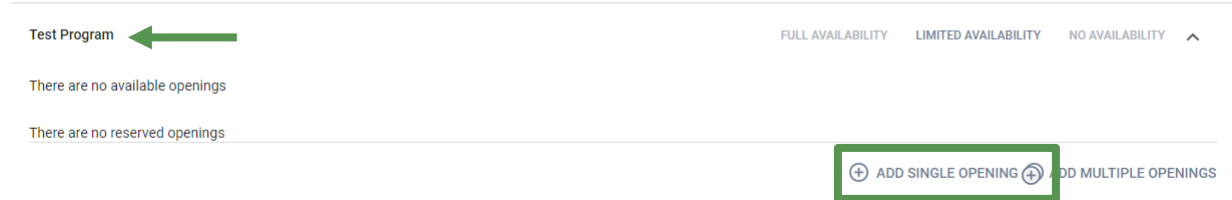
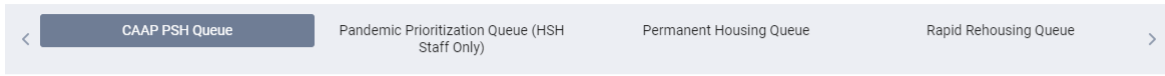
1. Start by ensuring that you are under the correct agency. You can change agencies through the dropdown list under your name in the top right corner of the screen.



2. Select **Referrals** [1], then **Availability** [2], then **CAAP PSH Queue** (or **Permanent Housing/RRH Queue** for units associated with the Henry Hotel– CoC program) [3]. If you cannot see the queue associated with your program, use the < > arrows to navigate left or right in the list of queues.



3. Select the appropriate program and click on it to expand posting options. Any available posted openings will appear. Underneath any listed openings, select **Add Single Opening**, and fill in the relevant information. List the unit number under the **Additional Notes** field.

A modal window titled 'ADD AN OPENING' with a close button in the top right. The form contains the following fields and controls:

- Date: A date input field with a calendar icon.
- Additional Notes: A text input field.
- Unit Number: A text input field with a small icon on the right.
- Unit Size (# of bedrooms): A text input field.
- Minimum Household Size (min. # of ppl): A text input field.
- Maximum Household Size (max. # of ppl): A text input field.
- What floor is the unit on?: A text input field.
- Does the building have an elevator?: A toggle switch.
- ADA Unit: A toggle switch.
- Does the building have stairs?: A toggle switch.
- Is the unit wheelchair accessible?: A text input field.

At the bottom are two buttons: 'SAVE CHANGES' and 'CANCEL'.

Receive a New Referral



This task is usually completed by *property managers*.



Change referrals to Pending In-Process within 1-2 days of receiving the referral.

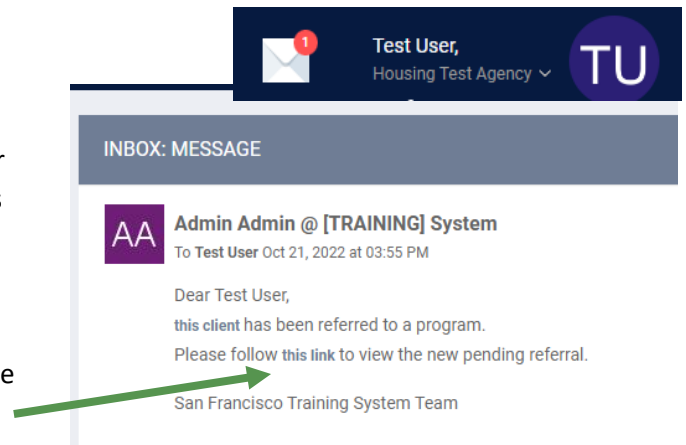
Overview

When a referral is made to an open unit in your program, identified staff will receive notification that a referral has been sent through the ONE system inbox and through an automatic email. To acknowledge the referral and mark it received, the status in ONE needs to be changed to Pending In-Process. This will notify other users, including Access Point staff and HSH staff, that the referral has been received and is in process. If the referral status is not changed to Pending In-Process, the referral will be sent back to the Community Queue in 180 days.

Step by Step

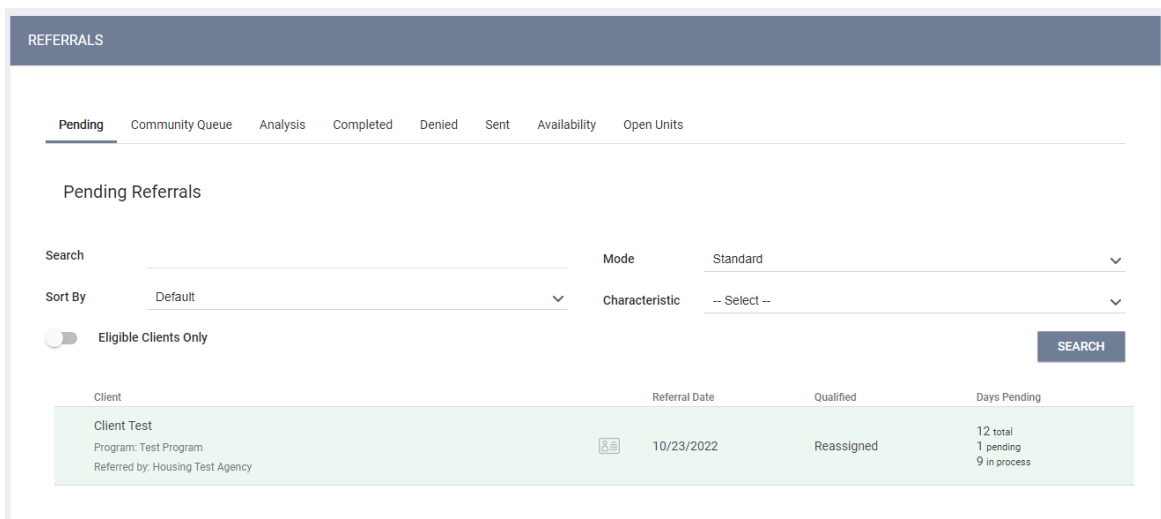
Option 1:

1. Identified staff will receive notifications through their ONE System inbox and into their email. Agency Leads can request notifications be set up for anyone who should receive them. Emails are sent from “San Francisco ONE System” <noreply@bitfocus.com>.
2. Click on the link in the message to jump directly to the referral record.



Option 2:

1. Under **Referrals**, navigate to the **Pending** tab. Identify the correct client and click the pencil tool to edit the referral.



Once in the referral record:


2. Scroll down to the **Status** field and change to **Pending in Process**.

Pending Community Queue Analysis Completed Denied Sent Availability Open Units

REFERRAL: EDIT

Client	Client Test
Referred Program	Test Program
Referred Program Opening	10/21/2022 1
Referred to Agency	Housing Test Agency
Referring Agency	[TRAINING] Department of Homelessness and Supportive Housing
Referred Date	09/19/2022 1:59 PM
Days Pending	32 day(s)
In Process	0 day(s)
Qualified	Reassigned
Referred by Staff	laura jessup ⓘ
Case Manager	Select ▼
Last Activity	09/19/2022 CHECK-IN
Status	Pending ▼
Private	

SAVE CHANGES CANCEL



Accept and Enroll Client in Program



This task is usually completed by **service providers**.



Enroll a client within three business days of move-in.



Pay attention to following appropriate steps for households.

Overview

Select the appropriate client and navigate to the **Programs** tab. Select the correct program under **Programs: Available**. Ensure that the “Program Placement a Result of Referral” toggle is ON. If this toggle is not on, please contact HAT. Enroll the client. Once the client is enrolled, the move-in date can be entered.

Step by Step

1. Open the client profile, and click into programs. Under **Programs: Available**, click on the appropriate program to expand. You can access the referral record here by clicking on the pencil icon next to the referral record in the list.

You can also access the client record by clicking on the client’s name from the **Pending** tab in **Referrals**.

The screenshot displays the 'Housing Test Agency' interface. At the top, there's a 'REFERRALS' section with tabs for 'Pending', 'Community Queue', 'Analysis', 'Completed', 'Denied', 'Sent', 'Availability', and 'Open Units'. The 'Pending Referrals' section shows a list of clients, with 'Client Test' highlighted. A green arrow points from this client entry to the 'Client Test' profile page. The profile page has tabs for 'PROFILE', 'HISTORY', 'SERVICES', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', 'CONTACT', 'LOCATION', and 'REFERRALS'. The 'PROGRAMS' tab is selected and highlighted with a green box. Below this, there's a 'PROGRAM HISTORY' section with 'No results found'. The 'PROGRAMS: AVAILABLE' section lists several programs: 'Evergreen PSH', 'Homeless Prevention', 'Riverside Rapid Rehousing', 'Test Program', and 'YHDP - Host Home Program'. The 'Test Program' entry is highlighted with a green box, and a green arrow points to its dropdown arrow.



- There should be an orange box [1] identifying that there is a pending referral to this program. Ensure the toggle that says ‘Program Placement is a result of Referral’ [2] is ON. If it is not selected, please contact HAT to ensure proper referral.

The screenshot shows the 'Client Test' interface with a dark blue header containing navigation tabs: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. The main content area is titled 'Test Program' and features a 'Referrals (90 Days)' section with a circular gauge showing '1 REFERRAL'. A legend below the gauge indicates: 100% Referrals Pending (orange), 0% Referrals Connecte (dark blue), and 0% Referrals Denied (light blue). Below this, there are sections for 'Funding Source' (Local or Other Funding Source) and 'Availability' (Limited Availability). A 'PROGRAM AVAILABILITY:' section shows 'Available openings' with a count of 0. A toggle switch [2] is set to 'ON' for 'Program Placement a result of Referral provided by [TRAINING] Department of Homelessness and Supportive Housing'. A red notification box [1] displays '1 pending referral(s). Oldest 33 days.'. Another toggle switch [3] is set to 'ON' for 'Include group members: Partner Test'. At the bottom, there is a 'PRINT DIRECTIONS' link and an 'ENROLL' button [4].

- Include any other household members who are moving in by toggling their names ON [3]. Doing so is essential to ensuring that the household can be placed in a unit together.
- Complete the enrollment for the client or household by selecting the **Enroll** button [4]. Doing so will accept the referral and link it to the enrollment record.
- Complete the enrollment, answering all questions. For a household with multiple individuals, the enrollment screen will appear for each household member. Be sure to complete the **Relationship to Head of Household** question.
- Be sure to complete the **Housing Move-In Date** for all household members on the **Enrollment** tab. The Housing Move-In Date cannot be earlier than the Program Enrollment Date.



Assign Client to a Unit



New Step!



This task is usually completed by **service providers** at the point of enrollment.



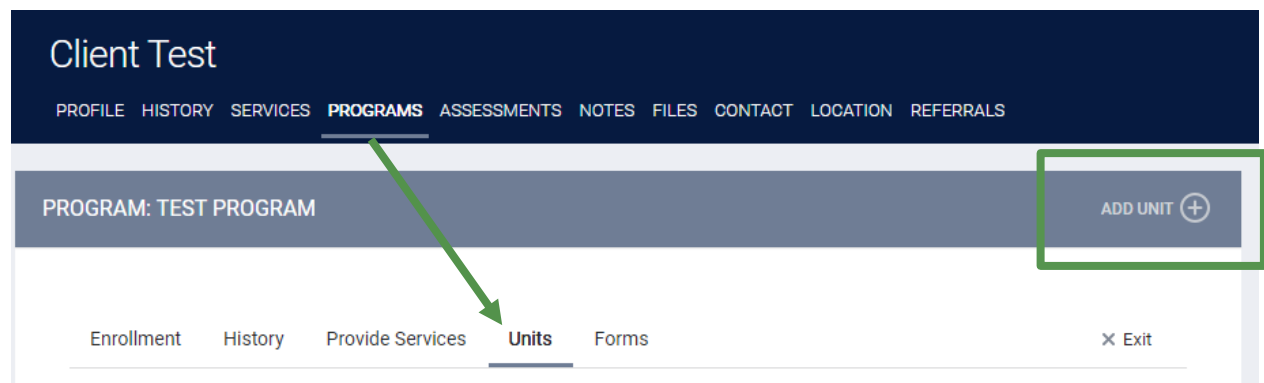
Pay attention to following appropriate steps for households.

Overview

Under the program tab in the appropriate client, click ‘Add Unit’ on the right side of the screen. Select the start date, and leave the end date and eligibility override sections as is. Under ‘Available Units’ start by selecting the relevant Assessment, then the appropriate unit from the available options. All enrolled clients should be associated with a unit number.

Step by Step

1. Under the **Program**, select the **Unit** tab.
2. Select the **Add Unit** option.



3. In the pop-up, fill in the start date. Under the **Available Units**, start by selecting the appropriate assessment to expand the unit choices. Select the correct unit, and confirm to assign the client into their new unit.

4. If an error message occurs when selecting **Available Units**, turn on the **Eligibility Override** toggle and try again.
5. For a household with multiple individuals, *only the head of*



household should be assigned to a unit. Errors will occur if other household members are assigned instead.

6. The unit will only successfully show as assigned to the client if the client has a **Housing Move-In Date** on their **Enrollment**. The **Housing Move-In Date** and **Unit Start Date** should be the same date for new move-ins.



Exit Client From a Program



New automated functionality: Exiting a client from a program also exits them from their unit.



This task is usually completed by *service providers*.



Update ONE within three business days of a client exit.



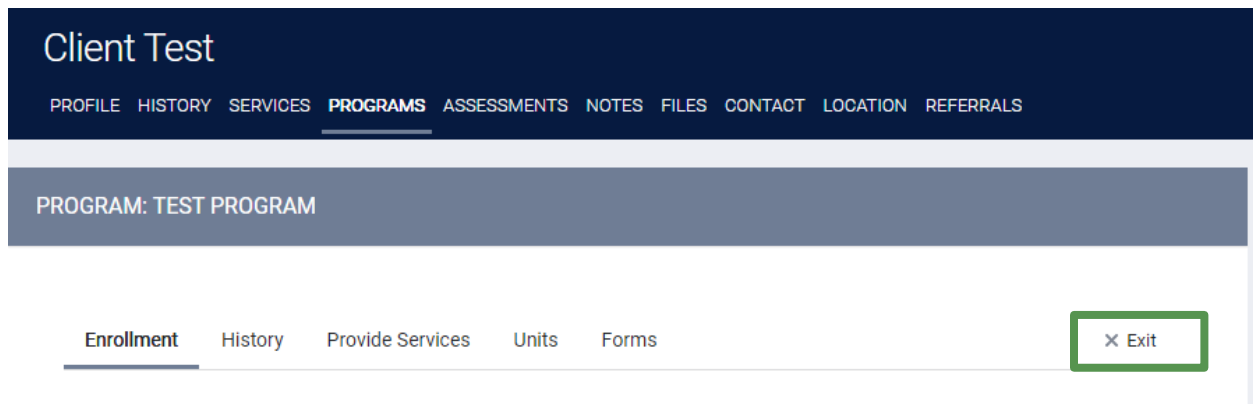
Pay attention to following appropriate steps for households.

Overview

Exiting a client from the program will now also exit a client from their assigned unit. Exit the client from the program by selecting the appropriate client, navigating to the program, and choosing 'Exit'.

Step by Step

1. Open the client record by searching for the client, navigating to **Programs**, select the appropriate program and click the pencil icon to edit. You can also open the program record directly by selecting the client from your **Caseload** list.
2. Select the **Exit** button on the far right, and complete all exit screens.



3. By exiting the client from the program, they will also be automatically exited from the unit. Be sure to select any additional household members who also need to be exited from the program and unit. Once all household members are exited, the unit will be automatically updated to Available.



The screenshot shows a web application interface for a 'Client Test' program. At the top, there is a navigation menu with options: PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below the menu, the page title is 'PROGRAM: TEST PROGRAM'. There are tabs for 'Enrollment', 'History' (selected), 'Provide Services', 'Units', and 'Forecast'. The main content area is titled 'Program Service History' and contains a table with columns for 'Service Name', 'Start Date', and 'End Date'. A row is visible with 'Referral: Test Program' as the service name, and dates '09/19/2022' and '10/23/2022'. Below the table are legend items for 'Reservation', 'Service', and 'Referral'. A modal dialog box titled 'SELECT CLIENTS TO EXIT FROM PROGRAM' is overlaid on the screen. It contains two rows of toggle switches: 'Client Test' (turned on) and 'Partner Test' (turned off), each with a 'Significant Other' label to its right. An 'END PROGRAM' button is located at the bottom of the dialog. The footer of the page reads 'Managed with Clarity Human Services'.

Select OK to confirm that the unit will be marked available as of the program exit date:

The screenshot shows a confirmation dialog box with a title bar that reads 'onesf-train.clarityhs.com says'. The main text of the dialog states: 'There is currently an active unit occupancy within this program enrollment. The unit occupancy end date will be updated to match the entered program exit date.' At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.



Transferring a Client to a New Unit



New Step!



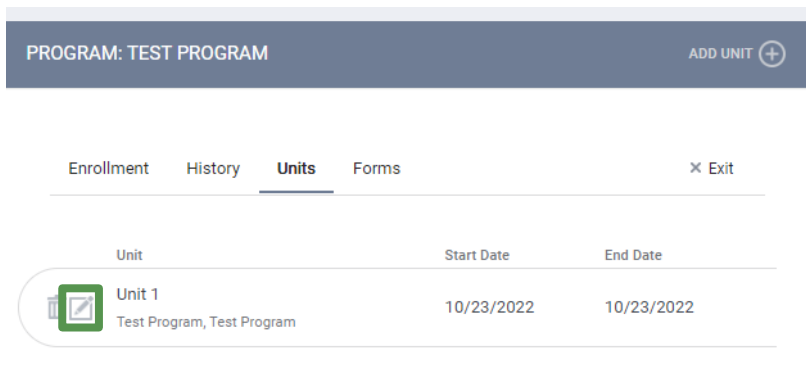
This task is usually completed by *property managers*.

Overview

If a client needs to switch units within a building, begin by searching for the client. Open their profile, select Programs, then the appropriate program. From there, navigate to the unit tab under the program tab. Open the unit, and select the end date. Then assign the client to a new unit following the same process as a new move-in. Under the program tab in the appropriate client, click ‘Add Unit’ on the right side of the screen. Select the start date, and leave the end date empty. Under ‘Available Units’ start by selecting the relevant assessment, then the appropriate unit from the available options. If there is no available assessment, please contact the Bitfocus help desk (onesf@bitfocus.com).

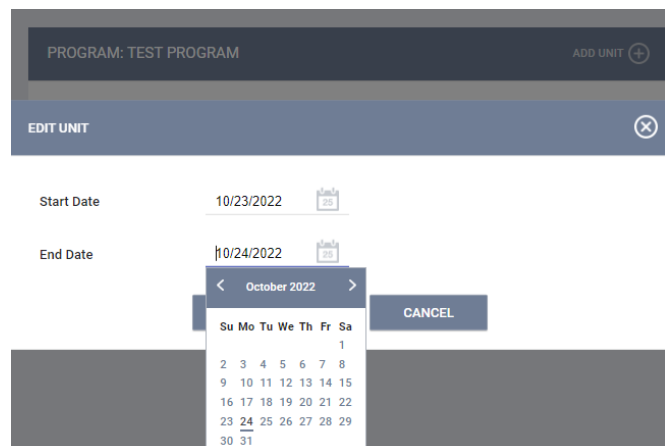
Step by Step

1. In cases when clients need to transfer units, either temporarily or permanently, changes can be made by clicking the pencil tool next to the unit number.



2. An end date should be selected, and then a new unit should be assigned under the **Add Unit** tool.

3. Under the **Program**, select the **Unit** tab. Select the **Add Unit** option.
4. In the pop-up, fill in the start date. Under the **Available Units**, select the correct unit, and confirm to assign the client into their new unit. You might need to turn on the **Eligibility Override** toggle to access the list of available units.



Set Unit Status to Offline or Back to Available After Being Offline



This task is usually completed by *property managers*.

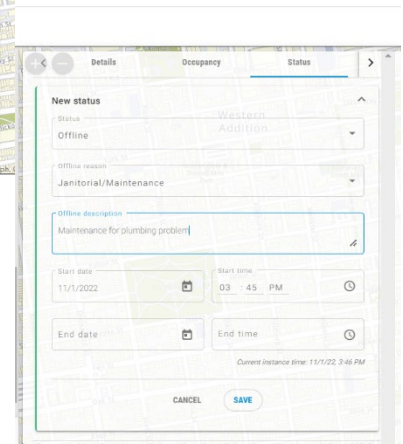
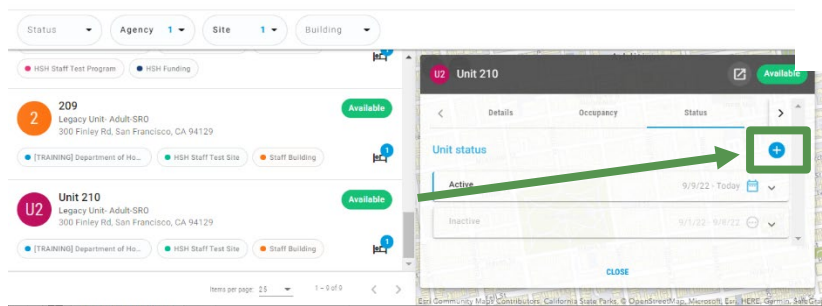
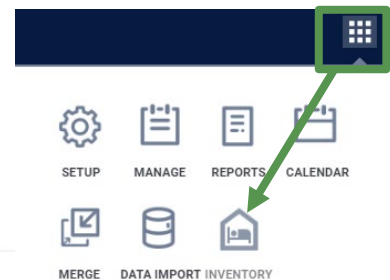
Overview

If a unit needs repairs or other updates before it is ready for a new client or is held for a transferring client, the unit status can now be set offline in ONE. The OVT is no longer needed for units in the HAT portfolio. Any time a unit is unavailable for client to move in right away, it should be set to offline.

In cases where a client is residing in a unit that needs repairs, the process to transfer the client (above) should be followed to transfer the client into their temporary unit. The leased unit should be set to offline following the process below. Once repairs are complete, the unit status can be set back to available by adding an end date to the offline status. This will make the unit available, and the client can be transferred back into their original unit in ONE again. If a unit needs to be set to permanently offline, please contact your HSH Program Manager to have the status set to Inactive.

Step by Step

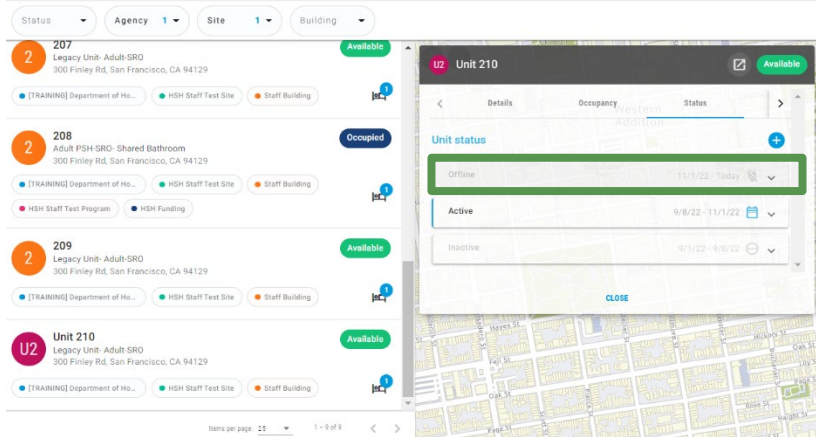
1. In cases where a unit is not ready for a new client immediately, the unit should be set to offline. To do so, start at the **Inventory Dashboard**, which can be found under the waffle tool.
2. Select the appropriate unit to expand the information. Click the **Status** button, then find the + to add an offline status.



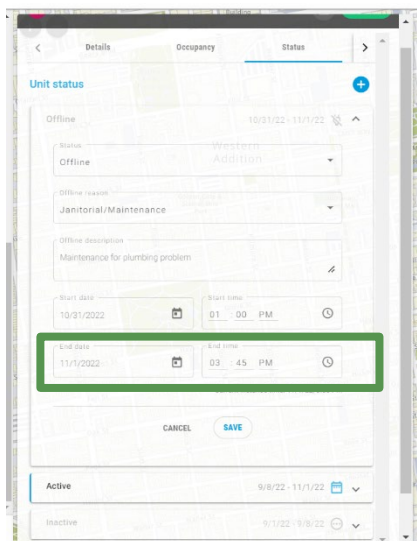
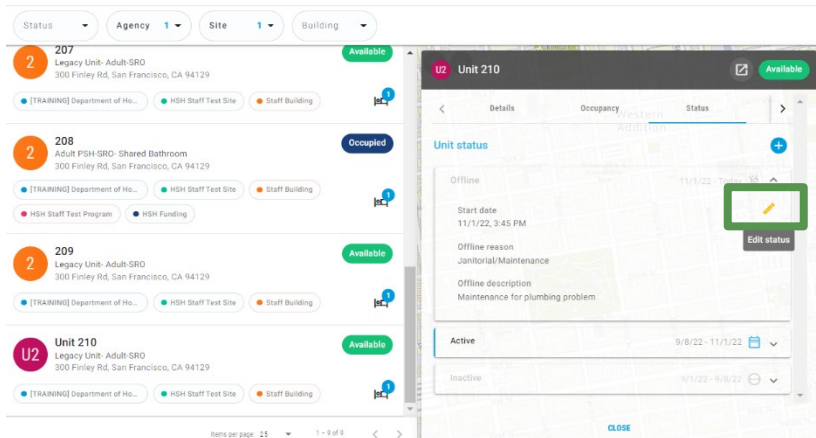
3. Select **Offline** under **New Status**. Select the appropriate offline reason and add in any needed notes. Select the appropriate date and time. A unit cannot be both offline and online at the same time, so selecting the right time is important. If there is a known end date, that can be entered. If the end date is not yet determined, leave blank.



4. When a unit is ready to be marked as Available, open the **Status** section again. Find the most recent **Offline Status**, which will be grey. Click the status entry to expand:

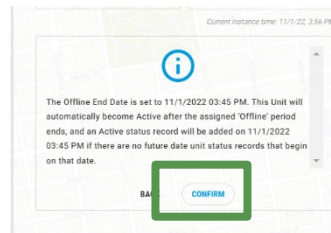


5. Select the pencil tool to edit this offline status.



6. Add an end date and time to the offline status. Choosing a time that has already passed will update the status change immediately.

7. Once you press save, a pop-up will prompt you to confirm that this will set the unit to active. Select **Confirm** to finalize the status change.



Review Roster Reports for Accuracy



New and updated reports are now available in ONE.



Both **property managers** and **service providers** are responsible for accurate data in ONE.



Check rosters weekly to ensure accuracy.



Pay attention to reviewing appropriate sections for households.

Overview

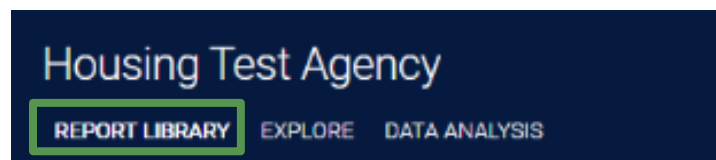
Review rosters weekly or more often to ensure that the information in ONE is accurate. To confirm that clients are associated with their current units in ONE, review the **Program Roster Report**, which now includes the unit numbers associated with a client’s program enrollment. To confirm that units are correctly identified as occupied, offline, or vacant, review the **Building Roster Report**.

Step by Step

Both Service Providers and Property Managers are responsible for ensuring that the data in ONE is accurate. There are two primary reports that will help with data quality: the Program Roster and the Building Roster.

1. Program Roster

- a. Under the waffle tool, select **Reports**.
- b. Under the **Report Library**, expand **Program Based Reports**. Find **Program Roster**, and click to run.



Program Based Reports		19 report(s) ^
[EMPL-101] Employment Report	★ ⌂ RUN 📅 SCHEDULE MORE INFO ▾	
[EMPL-102] Employment / Education Report	★ ⌂ RUN 📅 SCHEDULE MORE INFO ▾	
[EXIT-101] Potential Exits	★ ⌂ RUN 📅 SCHEDULE MORE INFO ▾	
[EXPS-103] Program Funding Source Financial Detail	★ ⌂ RUN 📅 SCHEDULE MORE INFO ▾	
[GNRL-105] Program Participation Summary	★ ⌂ RUN 📅 SCHEDULE MORE INFO ▾	
[GNRL-106] Program Roster	★ ⌂ RUN 📅 SCHEDULE MORE INFO ▾	
[GNRL-220] Program Details Report [2022]	★ ⌂ RUN 📅 SCHEDULE MORE INFO ▾	



- c. Select either the web or Excel version, which will include the unit information, or select the PDF version that includes both the program and unit.

REPORT LIBRARY

Program Based Reports > [GNRL-106] Program Roster

Program(s):

Status:

HoHs Only? No Yes

Report Date Range: -

Report Output Format: Web Page PDF - Program PDF - Program and Unit Excel

- d. Review the report for accuracy. Clients will either show as having a unit number under the **Unit Assignment** column or n/a. Households that are appropriately enrolled together will be listed within the same row. Households that are incorrectly enrolled will have one individual with a unit and the other household members will appear as n/a. Clients that have been assigned to a unit but do not have a move-in date will show as n/a.

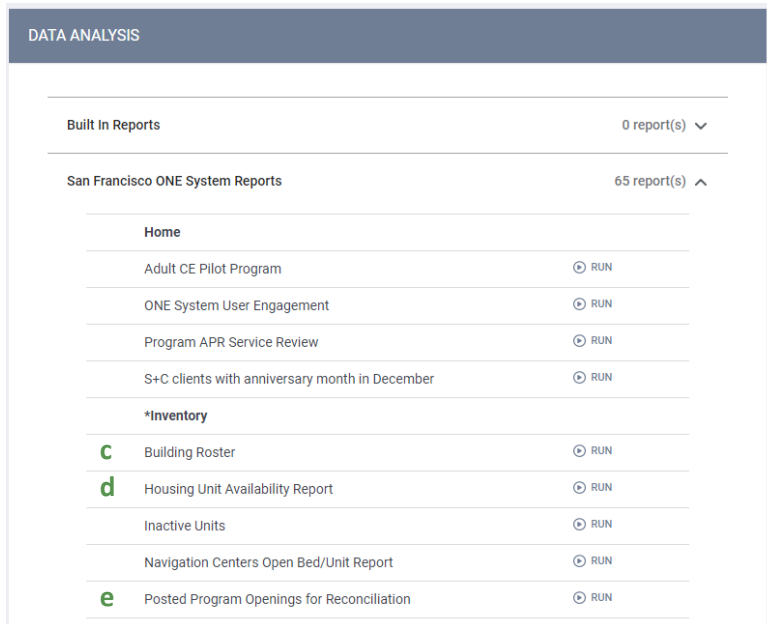
Program Roster Report		[TRAINING] Department of Homelessness and Supportive Housing (HSH)													
<p>Housing Move-in: Undefined = Unknown HoH or adjusted Move-in is Null, <input type="checkbox"/> = Non PH Project, A: Assessments, S: Services, CN: Case Notes You can find more information about adjusted Move-In Date at the Help Center Article Head of Household (HoH) Unique Identifiers are listed in bold text. Household members are grouped together with the HoH.</p>															
Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff	Unit Assignment	Unit Start Date	Unit End Date
<i>Program: HSH Staff Test Program</i>															
Tree, Olive	A83AC0DF8	09/09/1999	22	23	09/08/2022	-	87	09/08/2022	0	0	0	V. Damle	n/a	n/a	n/a
Rain, August	29107FD88	04/04/1980	42	42	09/08/2022	-	87	09/08/2022	0	0	0	C. Thomsen	200	09/08/2022	
Test Sr 2, Housing	14FAF7AD9	11/01/1998	23	24	09/20/2022	-	75	09/20/2022	0	0	0	S. Ray	208	11/01/2022	
Jones, Brad	995EA0A70	10/16/1965	57	57	10/26/2022	-	39	undefined	0	0	0	M. Wheeler	n/a	n/a	n/a
Smith, Mel	F4946A9ED	04/04/1985	37	37	10/26/2022	-	39	undefined	0	0	0	M. Wheeler	n/a	n/a	n/a
Rain, Love	9A6538967	06/02/1968	54	54	10/26/2022	-	39	undefined	0	0	0	M. Wheeler	n/a	n/a	n/a
Test Sr, Housing	30B145AF7	12/01/1955	66	66	10/31/2022	-	34	10/31/2022	0	0	0	S. Staff	n/a	n/a	n/a
Crayon, Blue	8704EB898	09/12/1998	24	24	11/02/2022	11/02/2022	0	11/02/2022	0	0	0	S. Hoffman	206	11/02/2022	
Potter, Harry	7E4332E72	07/31/1980	42	42	11/02/2022	-	32	11/02/2022	0	0	0	S. Edwards	202	11/02/2022	
Potter, Albus	8F831AE70	04/12/2006	16	16	11/02/2022	-	32	11/02/2022	0	0	0	S. Edwards			
Potter, Ginerva	65DFA16B1	12/12/1982	39	39	11/02/2022	-	32	11/02/2022	0	0	0	S. Edwards			
													Number of Enrollments: 11		
													Number of Unique Clients: 11		
													Number of Households: 9		
													Total Number of Enrollments: 11		
													Total Number of Unique Clients: 11		
													Total Number of Households: 9		

Note: * denotes Inactive Assigned Staff

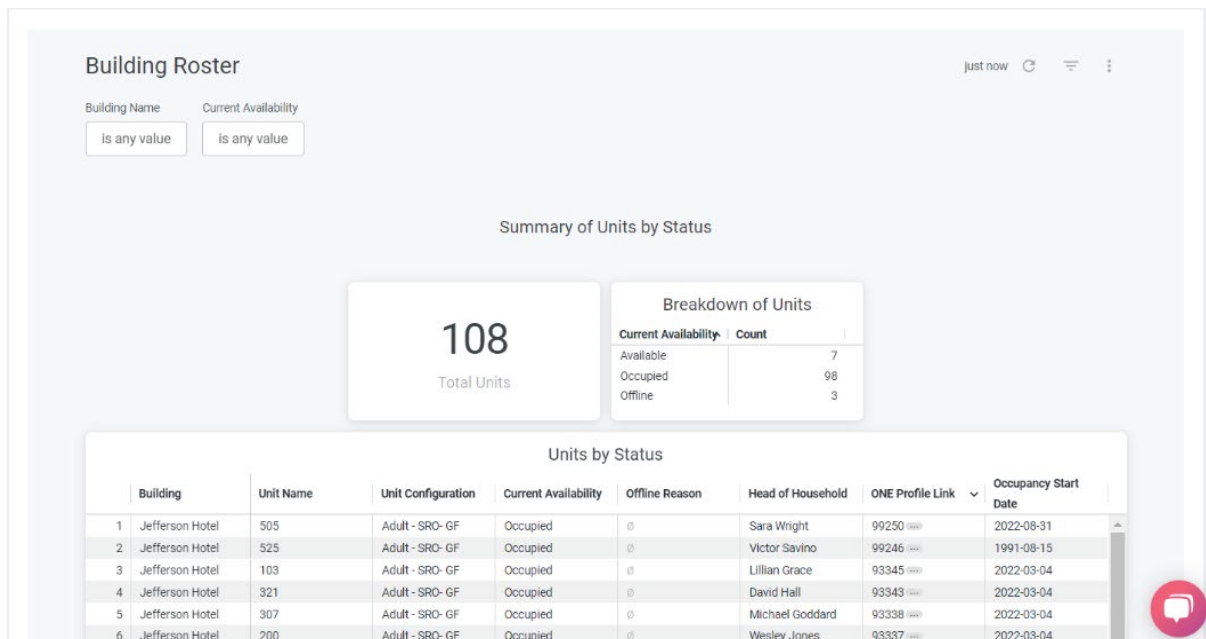


2. Building Roster

- a. Under the waffle tool, select **Reports**. Click to the **Data Analysis** tab. It often takes longer to load than other pages in the ONE System.
- b. Select **San Francisco ONE System Reports** to expand the menu. Under **Inventory**, select either the **Building Roster**, the **Housing Unit Availability Report**, or **Posted Program Openings for Reconciliation**.



- c. The **Building Roster Report** provides information on any given set of buildings. Filters can be used to limit the building under review or the unit status. Information on each client associated with a given unit is also presented in this report (client information removed below). Select **Update** to refresh the report if you have made any changes to the filters.



- d. The **Housing Unit Availability Report** demonstrates the number of available units for any chosen Agency, Building, etc. Filters can be used to view only units that meet a client’s needs, such as the occupancy of the unit, ADA status, bathroom needs, and kitchen options.

Housing Unit Availability Report just now

Agency Name: Building Name: Min Occupancy: Max Occupancy: ADA: Bathroom: Kitchen:

7
Currently Available Housing Units

Currently Available Housing Units							
Agency Name	Building Name	Unit Name	Unit Configuration Name	ADA	ADA Accessible for Hearing Impaired	ADA Accessible for Mobility	
1	Tenderloin Housing Clinic	Jefferson Hotel	105	Adult - SRO- GF	No	No	No
2	Tenderloin Housing Clinic	Jefferson Hotel	109	Adult - SRO- GF	No	No	No
3	Tenderloin Housing Clinic	Jefferson Hotel	205	Adult - SRO- GF	No	No	No
4	Tenderloin Housing Clinic	Jefferson Hotel	211	Adult - SRO- GF	No	No	No
5	Tenderloin Housing Clinic	Jefferson Hotel	323	Adult - SRO- GF	No	No	No
6	Tenderloin Housing Clinic	Jefferson Hotel	408	Adult - SRO- GF	No	No	No
7	Tenderloin Housing Clinic	Jefferson Hotel	423	Adult - SRO- GF	No	No	No

- e. The **Posted Program Openings for Reconciliation** report provides a quick high-level view of any program openings that are posted. (These openings are also visible under the Referrals tab, under Availability and Open Units.)

Posted Program Openings for Reconciliation 14m ago

Agency Name:

Agency Name	Name	Number of Posted Openings
Abode Services	Verona - GF	3
Abode Services	Verona - GF	3
Community Forward SF	Coronado Hotel - GF	1
Community Forward SF	Coronado Hotel - GF	1
Conard House	Aranda Hotel - HSH Fund	6
Conard House	McAllister Hotel - HSH Fund	1
Conard House	Aranda Hotel - HSH Fund	7
Episcopal Community Services (ECS)	Alder - HSH Fund	2
Episcopal Community Services (ECS)	Crosby Hotel - HSH Fund	1
Episcopal Community Services (ECS)	Elm Hotel - HSH Fund	7
Episcopal Community Services (ECS)	Henry Hotel - CoC	7
Episcopal Community Services (ECS)	Henry Hotel - GF	5
Episcopal Community Services (ECS)	Hillsdale Hotel - HSH Fund	2
Episcopal Community Services (ECS)	Elm Hotel - HSH Fund	24
Mary Elizabeth Inn	Mary Elizabeth Inn - GF	3
Mary Elizabeth Inn	Mary Elizabeth Inn - GF	3
Tenderloin Housing Clinic	All Star - HSH Fund	2
Tenderloin Housing Clinic	Jefferson Hotel - GF	2
Tenderloin Housing Clinic	Mission Hotel - GF	4

Agency Name	Name	Program Opening Date	Unit Number
Abode Services	Verona - GF	2022-03-01	#302
Abode Services	Verona - GF	2022-03-01	#202
Abode Services	Verona - GF	2022-11-18	#412
Community Forward SF	Coronado Hotel - GF	2022-06-09	211
Conard House	Aranda Hotel - HSH Fund	2022-10-21	507
Conard House	Aranda Hotel - HSH Fund	2022-12-01	306
Conard House	Aranda Hotel - HSH Fund	2022-12-01	308
Conard House	Aranda Hotel - HSH Fund	2022-12-01	408
Conard House	Aranda Hotel - HSH Fund	2022-12-01	609
Conard House	Aranda Hotel - HSH Fund	2022-12-01	616
Conard House	McAllister Hotel - HSH Fund	2022-06-11	315
Episcopal Community Services (ECS)	Alder - HSH Fund	2022-06-16	#324
Episcopal Community Services (ECS)	Alder - HSH Fund	2022-06-20	#326
Episcopal Community Services (ECS)	Crosby Hotel - HSH Fund	2022-10-13	502
Episcopal Community Services (ECS)	Elm Hotel - HSH Fund	2022-06-03	205
Episcopal Community Services (ECS)	Elm Hotel - HSH Fund	2022-06-01	#318
Episcopal Community Services (ECS)	Elm Hotel - HSH Fund	2022-06-05	317
Episcopal Community Services (ECS)	Elm Hotel - HSH Fund	2022-06-05	305
Episcopal Community Services (ECS)	Elm Hotel - HSH Fund	2022-06-16	#207
Episcopal Community Services (ECS)	Elm Hotel - HSH Fund	2022-06-22	#306
Episcopal Community Services (ECS)	Elm Hotel - HSH Fund	2022-12-02	#110
Episcopal Community Services (ECS)	Henry Hotel - CoC	2022-04-29	508
Episcopal Community Services (ECS)	Henry Hotel - CoC	2022-07-08	310
Episcopal Community Services (ECS)	Henry Hotel - CoC	2022-07-29	511



Managing Households



Both **property managers** and **service providers** are responsible for ensuring households are appropriately managed in ONE.



All information below covers specific data requirements for households.

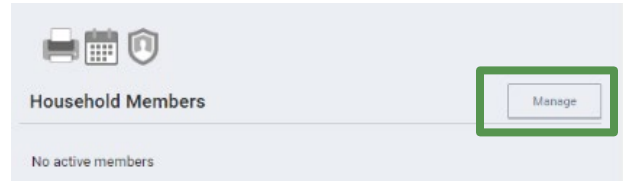
Overview

Households need to be correctly connected and associated in ONE to ensure that data is accurate and households jointly receive services as needed. Household composition is defined by the client. Anyone who will be residing in the same unit should be associated in the same household. However, household members listed in ONE do not *have* to live together.

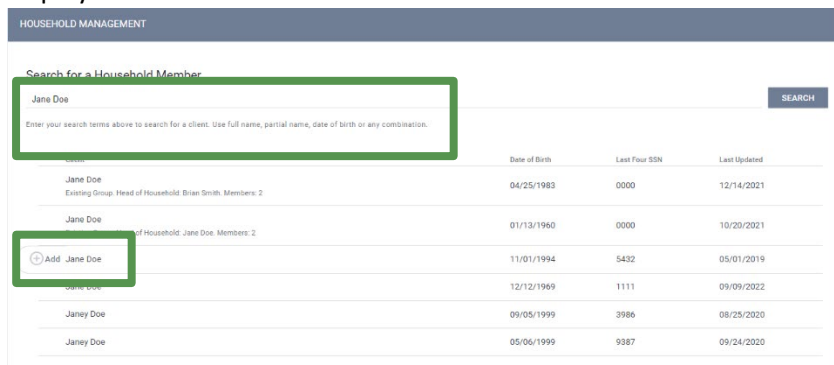
Step by Step

1. Households need to first be connected at the profile level.

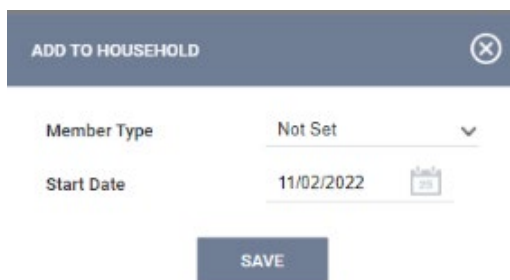
- a. New members can be added at the right of the client’s profile screen, under **Household Members**. Select **Manage** to begin.



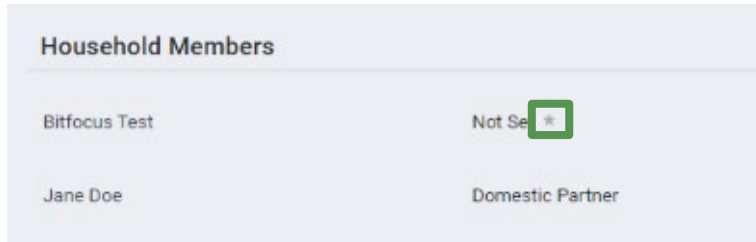
- b. Enter the name of the secondary household member into the search bar. Verify you have found the correct person using the date of birth or last four of their SSN, and hover over their name to display the Add button. Select Add.



- c. A window will pop up that allows you to select the relationship and the date that the secondary household member joined the household. This date should be on or before the date that the household moves into the unit.



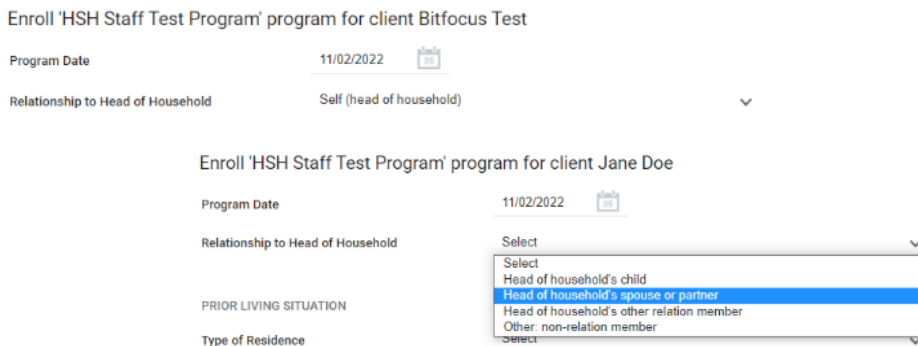
- d. Once complete, the household members will show on the right side of either client’s profile. The individual with the star is designated as the Head of Household. You can then edit the head of household’s relationship.



- 2. Clients also need to be connected as a household when enrolling into a program.
 - a. When completing the enrollment, find the section that says Include Group Members. Toggle this on for any members of the household that will also be living at this site.



- b. When enrolling, an enrollment screen will appear for each household member. The relationship to the Head of Household must be designated for each household member. The Head of Household should be the individual with the primary eligibility for the program. If the eligible person was not already set as Head of Household at client profile level, edit to reflect appropriate head of household.



- c. Once the enrollment is complete, *only the head of household* should be assigned to a unit. In reports, that will show as all household members under the same unit in one row. Errors will occur if the additional household members are assigned to the head of household instead.

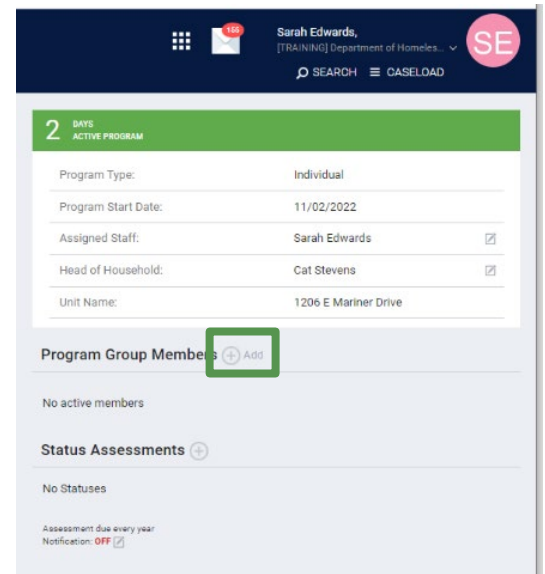
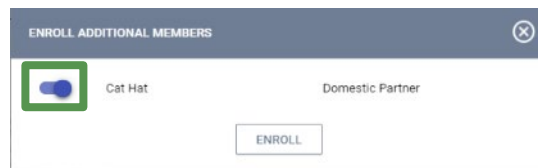


Program Roster Report		[TRAINING] Department of Homelessness and Supportive Housing (HSH)													
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Smith, Mel	F4946A9ED	04/04/1985	37	37	10/26/2022	-	39	undefined	0	0	0	M. Wheeler	n/a	n/a	n/a
Rain, Love	9A6538967	06/02/1968	54	54	10/26/2022	-	39	undefined	0	0	0	M. Wheeler	n/a	n/a	n/a
Test Sr, Housing	30B145AF7	12/01/1955	66	66	10/31/2022	-	34	10/31/2022	0	0	0	S. Staff	n/a	n/a	n/a
Potter, Harry	7E4332E72	07/31/1980	42	42	11/02/2022	-	32	11/02/2022	0	0	0	S. Edwards	202	11/02/2022	
Potter, Albus	8F831AE70	04/12/2006	16	16	11/02/2022	-	32	11/02/2022	0	0	0	S. Edwards			
Potter, Ginerva	65DFA16B1	12/12/1982	39	39	11/02/2022	-	32	11/02/2022	0	0	0	S. Edwards			

Number of Unique Clients: 11
 Number of Households: 9
 Total Number of Enrollments: 11
 Total Number of Unique Clients: 11
 Total Number of Households: 9

3. If a household member moves in after the head of household, they should be added to the enrollment, rather than enrolled separately.

- a. Open the head of household’s program enrollment, and look for Program Group Members on the right side of the screen. Select **(+) Add** to add in the other household members.
- b. A pop-up window will appear with all household members listed. Toggle on those that you wish to add to the enrollment. Anyone who will be residing in the unit should be added to the enrollment.



- c. Select **Enroll**, which will prompt you to complete the enrollment screen for the additional household member(s). Once completed, household members will show under **Program Group Members** for the original enrollee.



2
DAYS
ACTIVE PROGRAM

Program Type:	Group (2)
Program Start Date:	11/02/2022
Assigned Staff:	Sarah Edwards <input checked="" type="checkbox"/>
Head of Household:	Cat Stevens <input checked="" type="checkbox"/>
Unit Name:	1206 E Mariner Drive

Program Group Members

Cat Hat	11/04/2022	Active
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Status Assessments +

4. If a household is incorrectly assigned and both members are enrolled separately, only one will show as associated with a unit, and any others will show as n/a.

Program Roster Report		[TRAINING] Department of Homelessness and Supportive Housing (HSH)													
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Test Sr 2, Housing	14FAF7AD9	11/01/1998	23	24	09/20/2022	-	45	09/20/2022	0	0	0	S. Ray	208	11/01/2022	
Jones, Brad	995EA0A70	10/16/1965	57	57	10/26/2022	-	9	undefined	0	0	0	M. Wheeler	n/a	n/a	n/a
Smith, Mel	F4946A9ED	04/04/1985	37	37	10/26/2022	-	9	undefined	0	0	0	M. Wheeler	n/a	n/a	n/a
Rain, Love	9A6538967	06/02/1968	54	54	10/26/2022	-	9	undefined	0	0	0	M. Wheeler	n/a	n/a	n/a
Test Sr, Housing	30B145AF7	12/01/1955	66	66	10/31/2022	-	4	10/31/2022	0	0	0	S. Staff	n/a	n/a	n/a
Potter, Harry	7E4332E72	07/31/1980	42	42	11/02/2022	-	2	11/02/2022	0	0	0	S. Edwards	202	11/02/2022	
Potter, Albus	8F831AE70	04/12/2006	16	16	11/02/2022	-	2	11/02/2022	0	0	0	S. Edwards			
Potter, Ginerva	65DFA16B1	12/12/1982	39	39	11/02/2022	-	2	11/02/2022	0	0	0	S. Edwards			
Test, Bitfocus	560656F23	01/01/1978	44	44	11/02/2022	-	2	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a
Doe, Jane	D01CE8CF0	11/01/1994	28	28	11/02/2022	-	2	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a
Flowers, Daisy	41C59C539	04/01/1999	23	23	11/02/2022	-	2	undefined	0	0	0	S. Edwards	n/a	n/a	n/a
Stevens, Cat	FB5D77580	01/01/2001	21	21	11/02/2022	-	2	11/02/2022	0	0	0	S. Edwards	1206 E Mariner Drive	11/02/2022	
Hat, Cat	80B972D3C	11/16/1988	33	33	11/02/2022	-	2	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a

Number of Enrollments: 16
 Number of Unique Clients: 16
 Number of Households: 13
 Total Number of Enrollments: 16

- a. To join these individuals to a group enrollment, you will need to work with the Bitfocus help desk (onesf@bitfocus.com).
- b. First, review the household at the profile level and ensure that the household members are in a group together and the appropriate person is set as head of household. Confirm that the date of the household grouping is on or before the date of that the household moved in together.
- c. Then email the Bitfocus help desk at onesf@bitfocus.com. In the email, share the unique identifier of all household members, and note which member should become the head of household for the enrollment. The help desk will then change the enrollments so they are grouped as a household.



- d. Once the household is grouped, open the enrollment for each household member and ensure that the relationship is appropriately defined.

Relationship to Head of Household	Select ▼
PRIOR LIVING SITUATION	
Type of Residence	

Select

- Self (head of household)
- Head of household's child
- Head of household's spouse or partner
- Head of household's other relation member
- Other: non-relation member

