ONE System Housing Referral Workflow Toolkit

Site-Based Permanent Supportive Housing

Updated March 2024

Contents

Introduction – Housing Inventory Update

Context 2

What Inventory Does 2

What is Included in this Toolkit 2

Referral Workflow

Accept and Enroll Client in Program 3

Exit Client From a Program 5

Transferring a Client to a New Unit in the Program 7

Offline Reasons 8

Set Unit Status to Offline or Back to Available After Being Offline 9

Other Situations

Review Reports for Accuracy 12

Managing Households 19

Context

The Inventory functionality in ONE allows for information about specific housing units to be stored in the ONE System. This allows clients to be placed into a specific unit, unit history to be tracked, and units to be marked unavailable as needed. Inventory helps to improve efficiency, system-wide visibility, and streamlines the placement of clients into the units that best fit their needs.

What Inventory Does

Inventory in ONE is:

- A new set of tools built into the ONE System;
- A way to more precisely track and view the current status of each unit; and
- Information that will help better match clients to the units that fit their needs.

Inventory is not:

- A new or separate 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 helps with the following:

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

Keeping Inventory up to date requires both property management and services to update records in a timely manner. When a client moves out of a unit, it isn't available in ONE until the program exit is completed.

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, and other helpful hints. You can use the Contents section on the first page to jump directly to any task.

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.

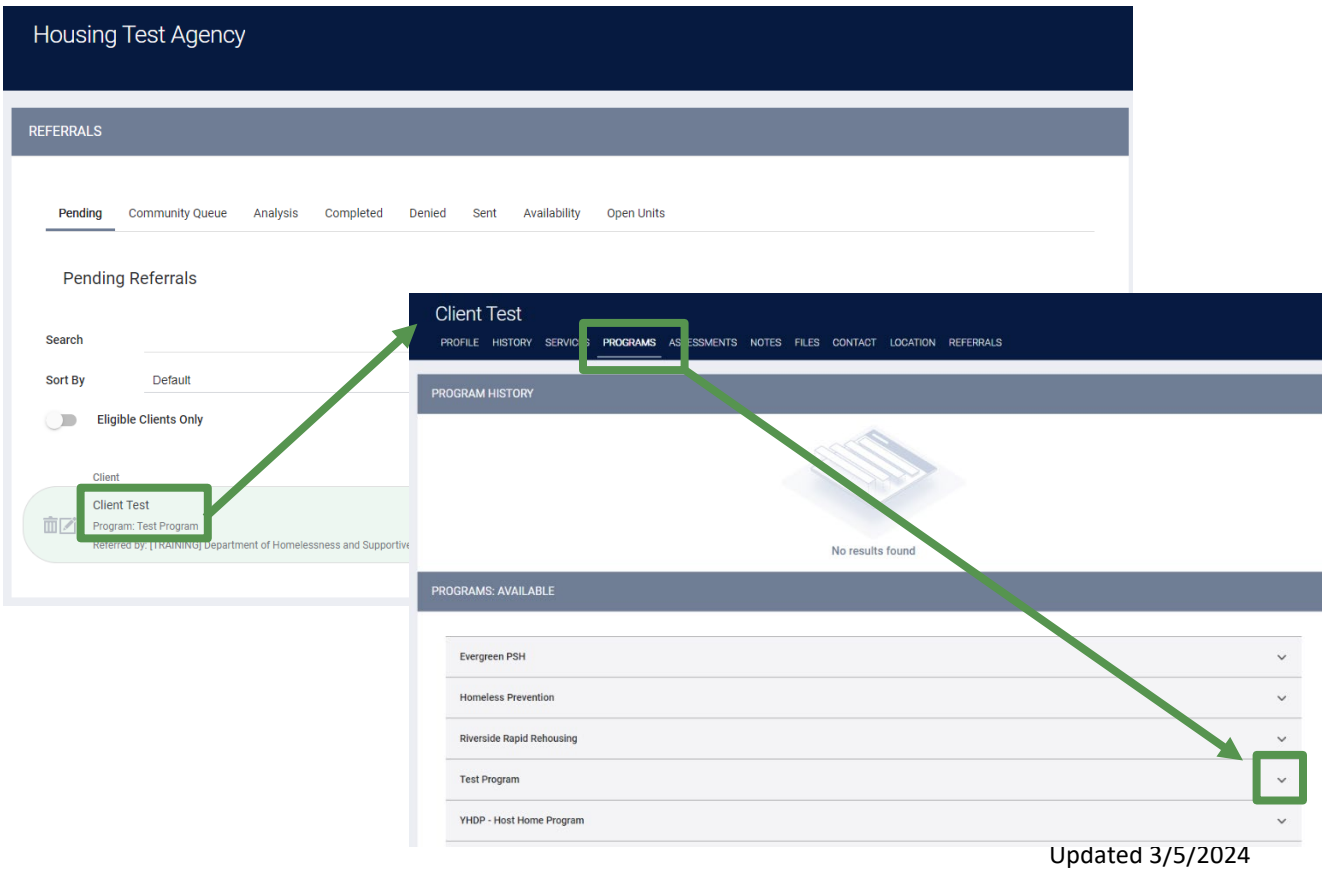
Overview

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 the Coordinated Entry Team. Enroll the client. Once the client is enrolled, the move-in date can be entered.

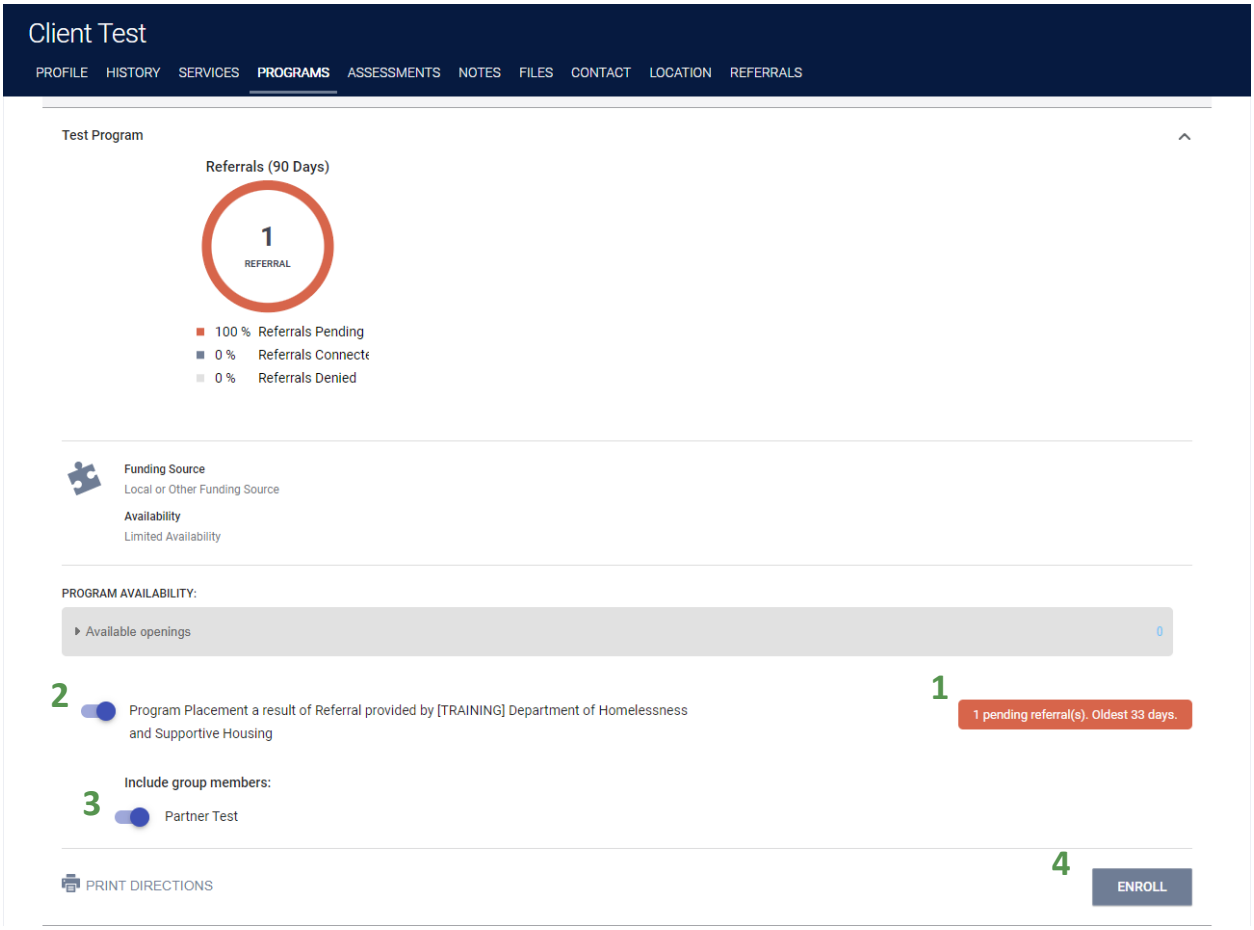
Step by Step

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**.



2. 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 the Coordinated Entry Team to ensure proper referral.



3. 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.

4. Complete the enrollment for the client or household by selecting the **Enroll** button [4]. Doing so will accept and close the referral and link it to the enrollment record.

5. 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.

6. 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. Pay special attention to the **Prior Living Situation** fields.

7. Ensure the **Unit Number** is correct. If it needs to be updated, follow the instructions for Transferring a Client to a New Unit, appears later in this Toolkit.

Exit Client From a Program

Inventory 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.

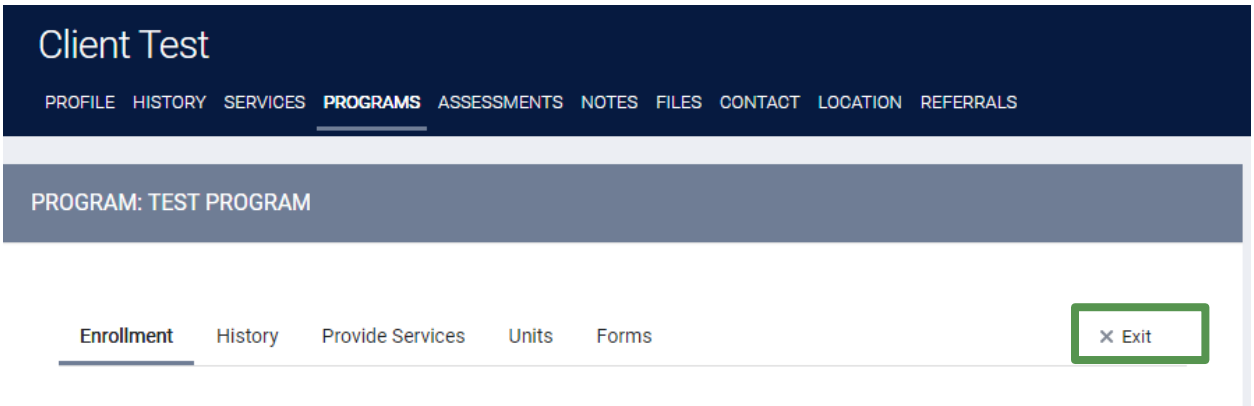
Overview

Exiting a client from the program also exits a client from their assigned unit. Exit the client from the program by selecting the appropriate client, navigating to the program, and choosing 'Exit'. It is critical to exit clients from the program and their units so that property management can update the unit status and receive a new referral.

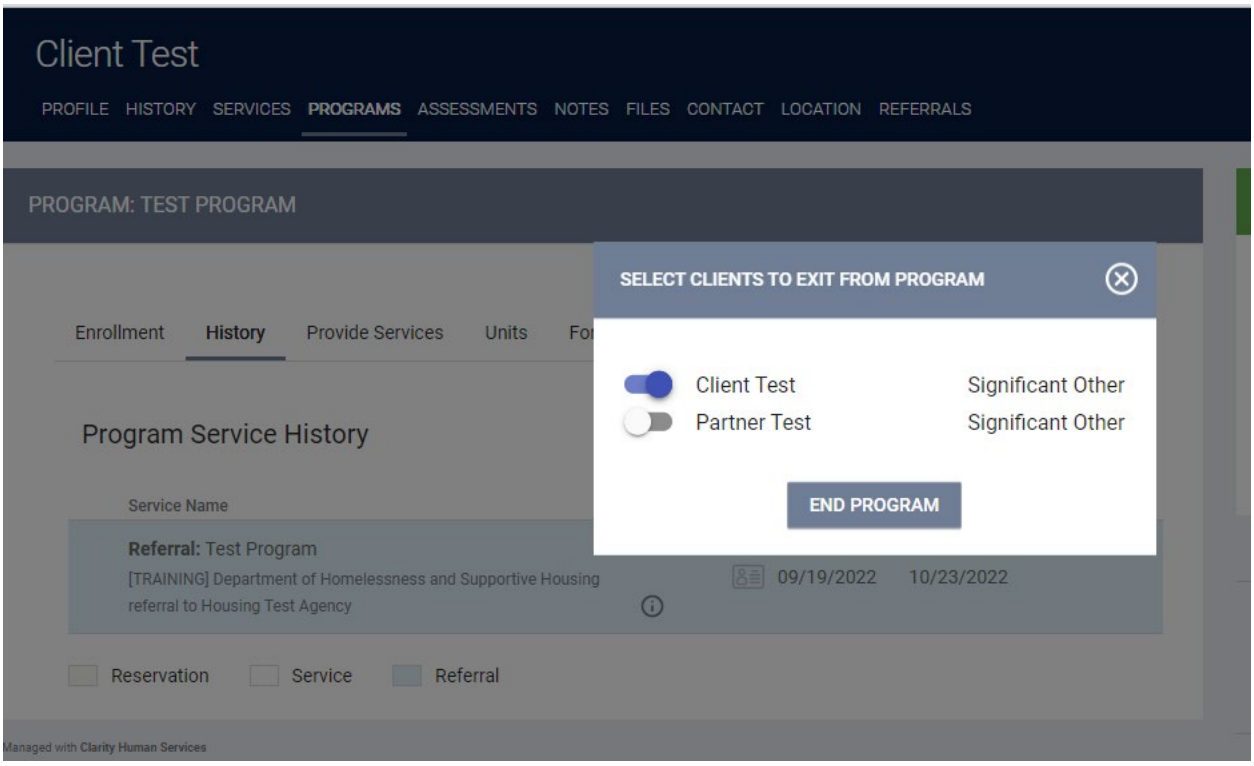
Step by Step

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.

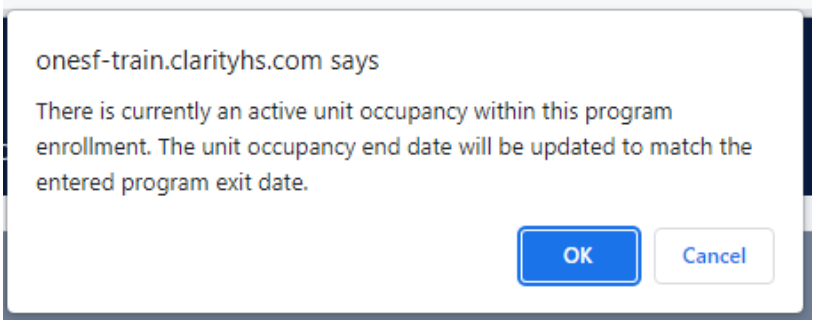
2. Select the **Exit** button on the far right, and complete all exit screens. Be sure to pay close attention to the exit reason and destination.



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 have been exited, the unit will be automatically be placed in **Automatically Set to Offline** status.



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



This **Automatically Set to Offline** status will allow Property Management to update the unit record with a specific offline status or to end the offline status to make the unit available to receive a referral.

Transferring a Client to a New Unit in the Program

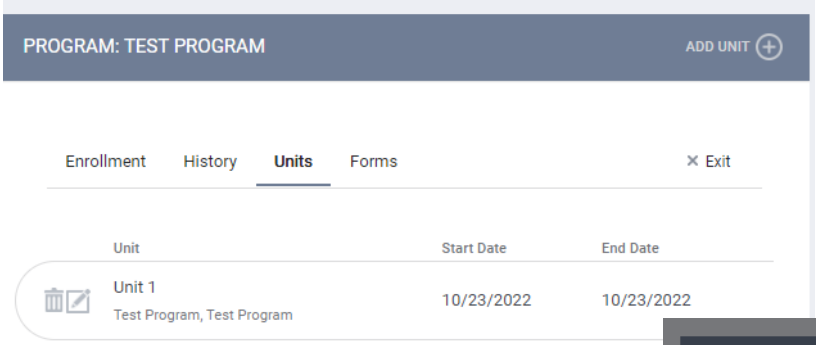
This task is usually completed by ***property managers***.

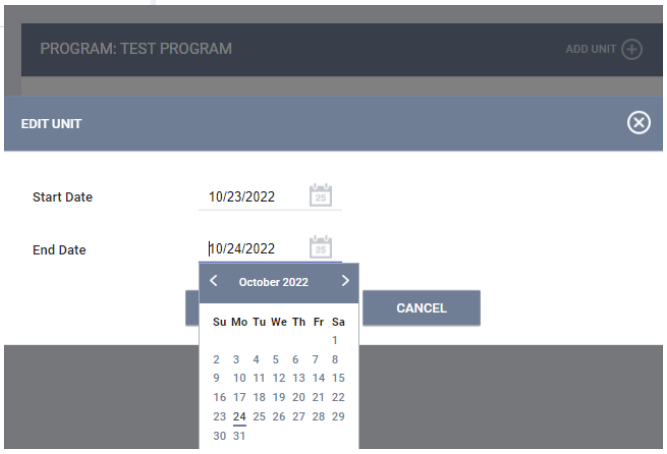
Overview

If a client needs to switch units within a building and program, 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. If an error message occurs, or no units appear, when selecting Available Units, turn on the Eligibility Override toggle and try again.

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.

   In the pop-up, fill in the start date and *leave the end date blank*. 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.

Note: If a client is moving from a unit in one program to another program with the same provider via an internal transfer, the client must be exited from the current program and enrolled in the new program before the new unit can be assigned.

Offline Reasons

This section provides information and definitions on offline reasons. The subsequent section provides step-by-step directions on how to change a unit status to offline.

Overview

Setting units to offline and ending the offline status to bring those units back to available is an essential part of the Inventory workflow. Below, the specific offline reasons and their definitions are outlined. Data on the offline reasons is included in reporting and decision-making, so it is important to select the most accurate and appropriate reason when marking a unit offline.

Each offline reason is prefixed by the corresponding program areas where it may be used:

- **HSG** (housing)
- **SHLTR** (shelter)

For any questions not answered in this chart, please contact the help desk at onesf@bitfocus.com.

Reason Name	Definitions
Automatically Set to Offline	The unit or bed was automatically set to offline with this reason by the system when the previous household was exited from the program.
HSG – Coroner Hold	The unit is held pending a coroner or medical examiner review.
HSG – Internal Transfer	The unit is held for an in-program transfer, such as a reasonable accommodation move or other transfer from another unit in the same program.
HSG – Occupied by Legacy Tenant	The unit is currently occupied by a legacy tenant who is not enrolled in the program in ONE.
HSG – Occupied but No Client ROI	The unit is currently occupied by a client refusing to sign an ROI, meaning they cannot be enrolled in the program in the ONE System.
HSG – Occupied Temporarily by Client from Other Program/Building	The unit is temporarily occupied by a client who is enrolled in another program or building, and therefore cannot be assigned to the client.
HSG/SHLTR – Janitorial/Maintenance	The unit is unavailable for client placement due to janitorial or maintenance needs.
HSG/SHLTR – Property Hold	The unit is unavailable due to a property hold. This status can also be used for property management needs that are not covered by any other offline reason. Please include notes explaining the circumstance.
SHLTR – Hospital Hold	The unit or bed is held for a client who is temporarily at a health care facility.
SHLTR – Jail Hold	The unit or bed is held for a client who is temporarily incarcerated.

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

This task is usually completed by ***property managers***.

Overview

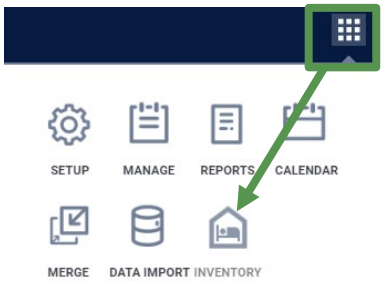
If a unit needs repairs or other updates before it is ready for a new client or otherwise temporarily unavailable, the unit status can now be set offline in ONE. Any time a unit is unavailable for a client to move in right away, it should be set to offline.

In cases where a client is residing in a unit that needs repairs, the process to transfer the client 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. Do not set units to Inactive without contacting HSH.

If a unit remains offline but the reason for it being offline changes, a new offline status should be added to ensure the history of the unit is accurately recorded. For example, if a unit is under a coroner hold for two months and then is unavailable due to repairs, each window of time should be reflected in a unique offline status.

Step by Step

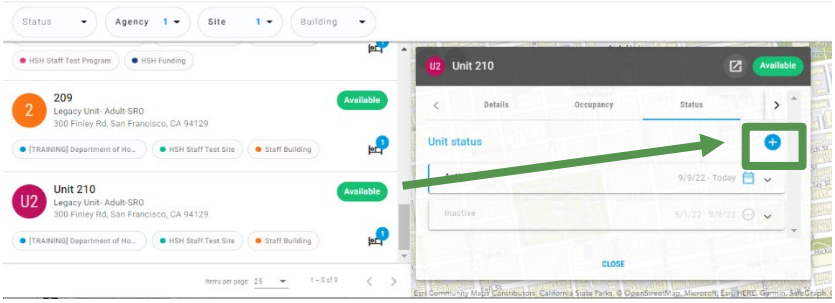
Make a Unit Offline



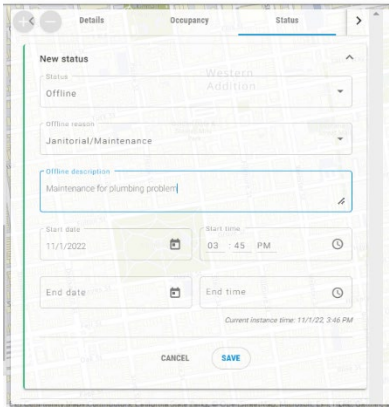
1. In cases where a unit is not ready for a new client immediately, the unit should be set to offline. To do so, ensure you are in the agency associated with the program/building and then go to the **Inventory Dashboard**, which can be found under the waffle tool.

2. Select the Building by using Building filter at the top of the page.

3. Select the appropriate unit to see the unit's pop-up display card. Click the **Status** button, then find the (**+**) to add an offline status.

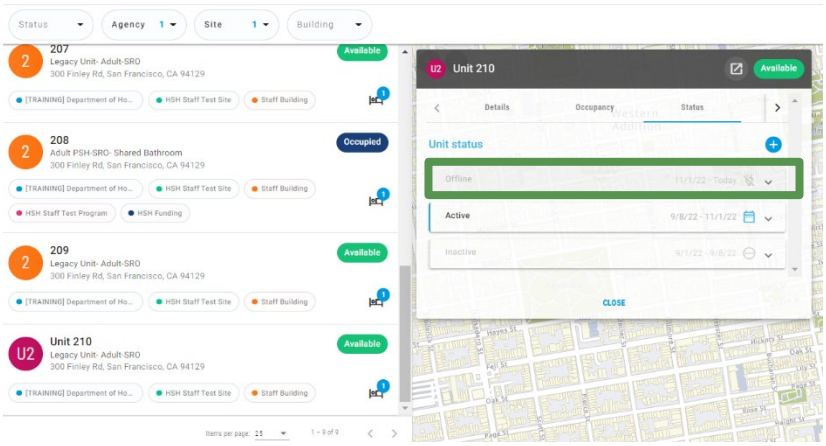


4. Select **Offline** under **New Status**. (Do *not* use Inactive.) Select the appropriate offline reason and add in any needed notes. Select the appropriate date and time. A unit cannot be both offline and online at the same time, so selecting the right time is important. *Leave the **End Date** for the offline status as blank*. Even if you have a projected date the unit will be available, it is important to leave the End Date blank until the unit is actually available again.

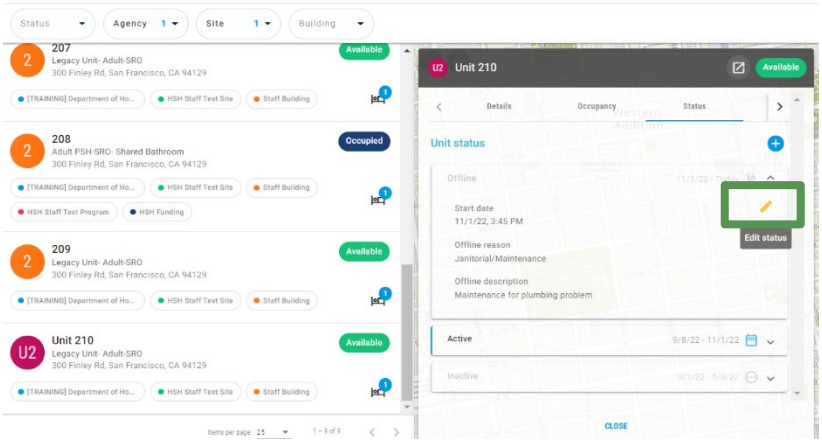


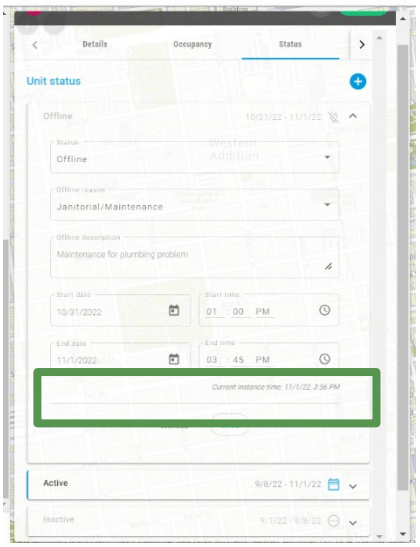
End an Offline Status and Update Unit Status Back to Available

1. 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:



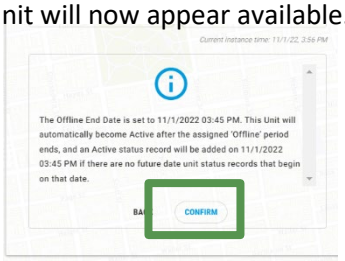
2. Select the pencil tool to edit this offline status (the pencil will only appear if you are under the agency associated with the program/building, so you may need to switch agencies and try again if you are a user with access to multiple agencies in ONE).





3. Add an end date and time to the offline status. Choosing a time that has already passed (such as 30 minutes before the current time) will update the status change immediately.

4. 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. The unit will now appear available.



Review Reports for Accuracy

New and updated reports are available in ONE.

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

Check reports weekly to ensure accuracy.

Pay attention to reviewing appropriate sections for households.

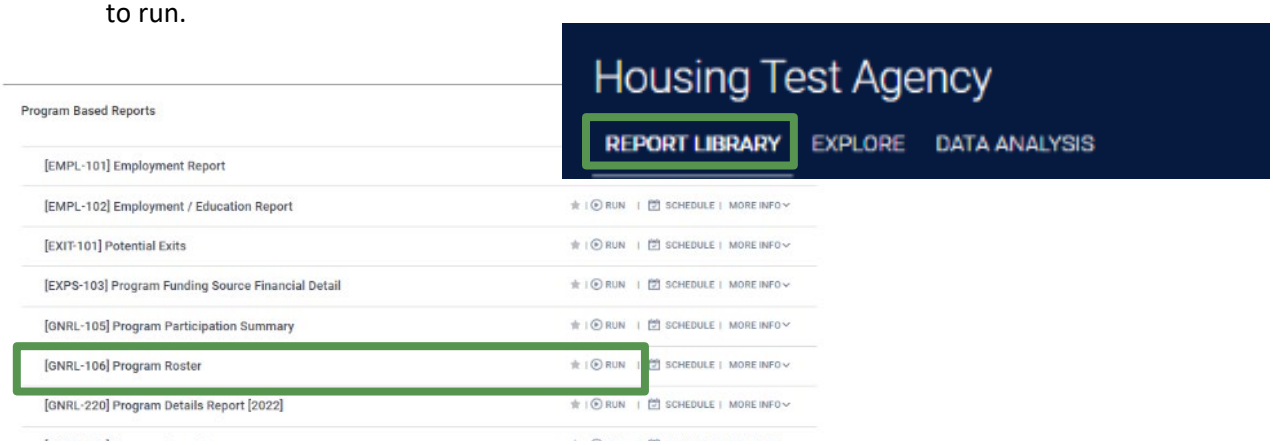
Overview

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. This report is available under the Report Library. All other reports are in the Data Analysis tab. To confirm that units are correctly identified as occupied, offline, or available, review the **Building Roster Report**. To quickly pinpoint which clients have missing unit assignments, review the **Program Rosters to Verify Unit Assignments** report. (Note: ECS, THC, and TNDC have separate versions of these reports due to size limitations.) Review the **Housing Inventory Snapshot** to see a summary count of units by status. The **Properties of Buildings** and **Properties of Units** reports include the information in the system about each building and unit so that you can view and review them for accuracy.

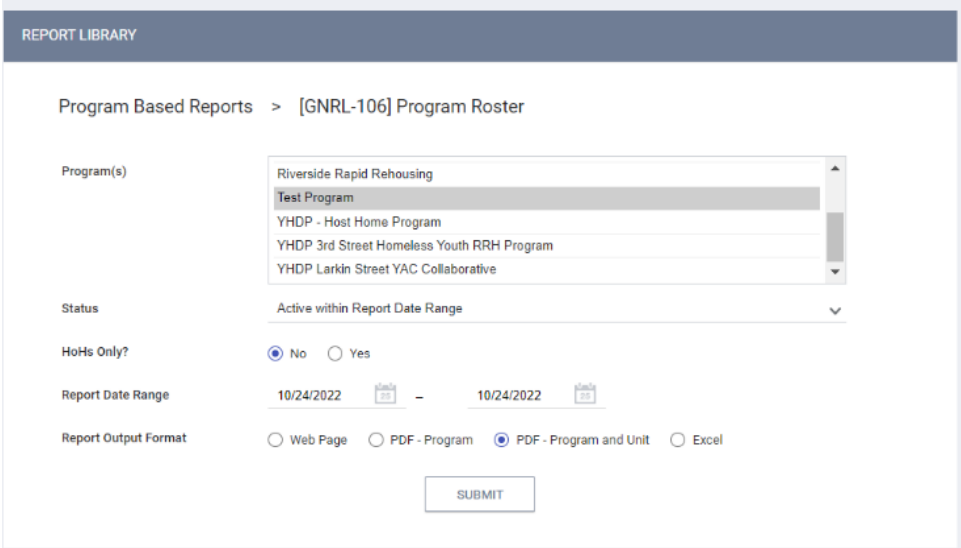
Step by Step

Both Service Providers and Property Managers are responsible for ensuring that the data in ONE is accurate. Below are the primary reports that will help with data quality.

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.



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.



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 section with one unit listed in the unit assignment cell. Households that are incorrectly enrolled will have one individual with a unit and the other household members' units will appear as n/a. All clients must have a move-in date associated with their enrollment, so any showing as undefined must be updated.

Program Roster Report | **[TRAINING] Department of Homelessness and Supportive Housing (HSH)**

Housing Move-in: Undefined = Unknown HoH or adjusted Move-in is Null, = 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.

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	Bed Assignment	Occupancy Start Date	Occupancy End Date
Program: HSH Staff Test Program - HSH Funding																
Crayon, Blue	**8704EB898**	09/12/1998	24	24	11/02/2022	11/02/2022	0	11/02/2022	0	0	0	S. Hoffman	206 Test	n/a	11/02/2022	
Potter, Harry	**7E4332E72**	07/31/1980	42	42	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	202	n/a	11/02/2022	
Potter, Albus	8F831AE70	04/12/2006	16	17	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a		
Potter, Ginerva	65DFA16B1	12/12/1982	39	40	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a		
Test, Bitfocus	**560656F23**	01/01/1978	44	45	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Doe, Jane	D01CE8CF0	11/01/1994	28	28	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Fox, Freddy	**0E70D5AE7**	02/12/2001	21	22	11/02/2022	-	60	undefined	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Stevens, Cat	**FB5D77580**	01/01/2001	21	22	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	1206 E Mariner Drive	n/a	11/02/2022	
Hat, Cat	80B972D3C	11/16/1988	33	34	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards		n/a		
Sponge, Bob	**6384CA5F2**	01/03/1981	41	42	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Cattlkins, Belles	**D028D613E**	10/27/2007	15	15	11/09/2022	-	53	11/09/2022	0	0	0	L. Asher	n/a	n/a	n/a	n/a
Test, Gabriela	**A820A8B6D**	01/01/2001	21	22	12/07/2022	12/13/2022	6	undefined	0	0	0	G. Perez	n/a	n/a	n/a	n/a
Test Sr 2, Housing	**14FAF7AD9**	11/01/1998	24	24	12/12/2022	-	20	12/12/2022	0	0	0	S. Ray	208	n/a	12/12/2022	12/12/2022

Number of Enrollments: 13
Number of Unique Clients: 13
Number of Households: 9

Total Number of Enrollments: 13
Total Number of Unique Clients: 13
Total Number of Households: 9

*Note: * denotes Inactive Assigned Staff*

Program Roster Troubleshooting Tips:

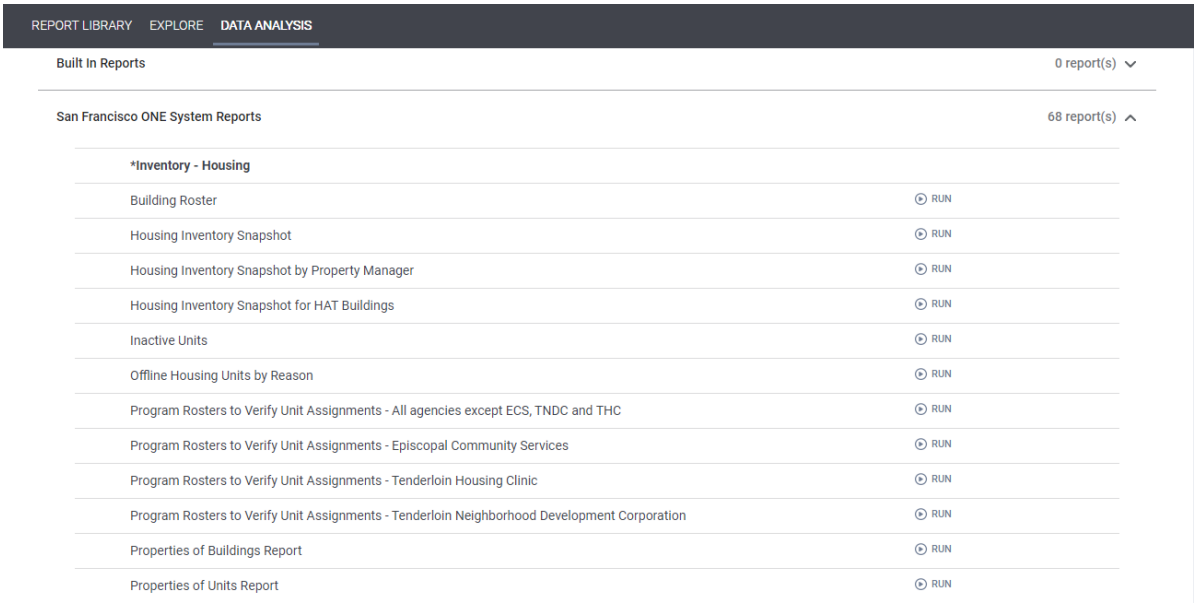
- *If a client does not appear on the program roster report,* they must be enrolled in the program. See Accept and Enroll Client in a Program.
- *If a client appears on the program roster report, but their unit is incorrect*, they need to be associated with their current unit. See Transferring a Client to a New Unit.
- *If a client has "N/A" in the unit column,* this could be one of two issues:
  - 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. Any housing move-in dates showing as "undefined" should be updated to reflect the date the client moved into the building.
  - 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.

Accessing Reports in the Data Analysis Tab

1. Under the waffle tool, select **Reports**. Select the **Data Analysis** tab. It often takes longer to load than other pages in the ONE System.

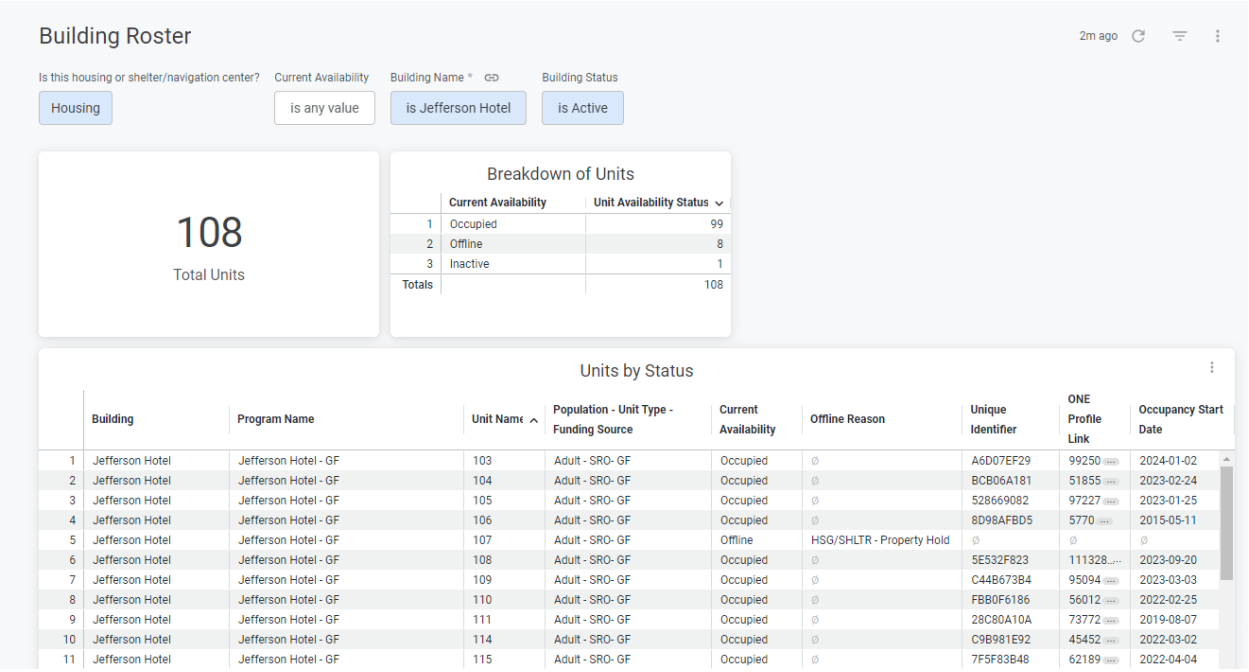
2. Select **San Francisco ONE System Reports** to expand the menu. Under **Inventory - Housing**, there are custom reports for various purposes:

   Building Roster: Includes all clients in a building with unit assignments
   Housing Inventory Snapshot: Displays total units by status in each building
   Program Rosters to Verify Unit Assignments: Lists clients enrolled in a program with no unit assigned
   Properties of Buildings/Units: Include information about each building and unit in the ONE System



2. Building Roster

a. Under the waffle tool, select **Reports**. Select the **Data Analysis** tab. Select **San Francisco ONE System Reports** to expand the menu. Under **Inventory**, select the **Building Roster**.



Building Roster

2m ago

Is this housing or shelter/navigation center? Housing | Current Availability is any value | Building Name * is Jefferson Hotel | Building Status is Active

108
Total Units

Breakdown of Units

	Current Availability	Unit Availability Status
1	Occupied	99
2	Offline	8
3	Inactive	1
Totals		108

Units by Status

	Building	Program Name	Unit Name	Population - Unit Type - Funding Source	Current Availability	Offline Reason	Unique Identifier	ONE Profile Link	Occupancy Start Date
1	Jefferson Hotel	Jefferson Hotel - GF	103	Adult - SRO- GF	Occupied	∅	A6D07EF29	99250	2024-01-02
2	Jefferson Hotel	Jefferson Hotel - GF	104	Adult - SRO- GF	Occupied	∅	BCB06A181	51855	2023-02-24
3	Jefferson Hotel	Jefferson Hotel - GF	105	Adult - SRO- GF	Occupied	∅	528669082	97227	2023-01-25
4	Jefferson Hotel	Jefferson Hotel - GF	106	Adult - SRO- GF	Occupied	∅	8D98AFBD5	5770	2015-05-11
5	Jefferson Hotel	Jefferson Hotel - GF	107	Adult - SRO- GF	Offline	HSG/SHLTR - Property Hold	∅	∅	∅
6	Jefferson Hotel	Jefferson Hotel - GF	108	Adult - SRO- GF	Occupied	∅	5E532F823	111328...	2023-09-20
7	Jefferson Hotel	Jefferson Hotel - GF	109	Adult - SRO- GF	Occupied	∅	C44B673B4	95094	2023-03-03
8	Jefferson Hotel	Jefferson Hotel - GF	110	Adult - SRO- GF	Occupied	∅	FBB0F6186	56012	2022-02-25
9	Jefferson Hotel	Jefferson Hotel - GF	111	Adult - SRO- GF	Occupied	∅	28C80A10A	73772	2019-08-07
10	Jefferson Hotel	Jefferson Hotel - GF	114	Adult - SRO- GF	Occupied	∅	C9B981E92	45452	2022-03-02
11	Jefferson Hotel	Jefferson Hotel - GF	115	Adult - SRO- GF	Occupied	∅	7F5F83B48	62189	2022-04-04

b. The **Building Roster Report** provides information on the status of each unit in a building. Information on each client associated with a given unit is also presented in this report (client information removed below). Select the desired building and then click **the blue circular update arrow** [ ] to refresh the report.

Building Roster Troubleshooting Tips:

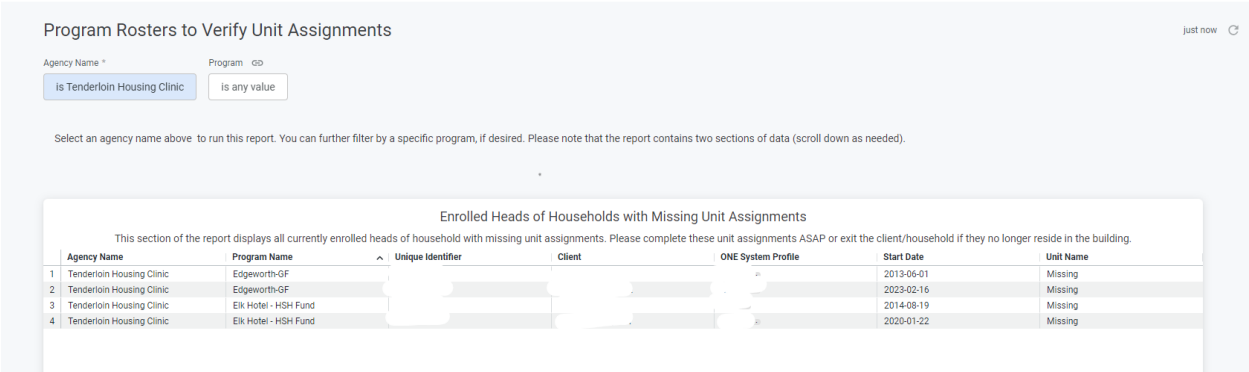
- *If a client appears on this report who no longer lives in your building*, they need to be exited from the program to also exit them from the unit record in ONE. See Exit Client from a Program.
- *If a client appears on the report, but their unit is incorrect*, they need to be associated with their current unit. See Transferring a Client to a New Unit.
- *If a current tenant does not appear on the report,* they must be enrolled in the program and their current unit verified. See Accept and Enroll Client in a Program and Transferring a Client to a New Unit.

3. Program Rosters to Verify Unit Assignments (by Agency)

a. Under the waffle tool, select **Reports**. Select the **Data Analysis** tab. Select **San Francisco ONE System Reports** to expand the menu. Under ***Inventory - Housing**, select **Program**

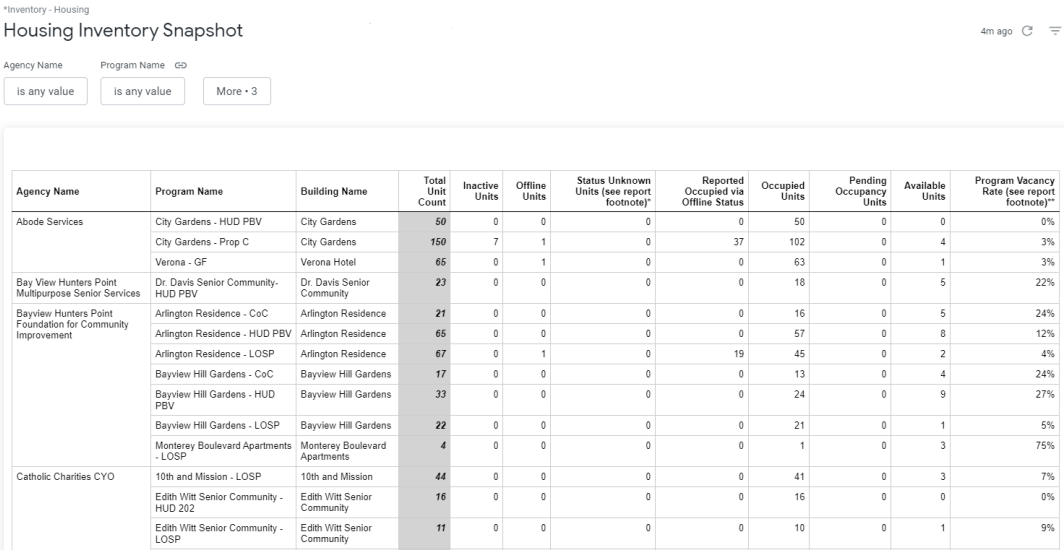
Rosters to Verify Unit Assignments (NOTE: there are multiple versions of this report by the services provider agency).

b. The Program Rosters to Verify Unit Assignments report functions to reconcile clients who are enrolled in programs but do not currently have a unit assigned. You must filter this report by agency and can additionally filter by program. Be sure to refresh the report using the **blue circular update arrow** [ ] whenever you update the filters. The top section of the report shows all enrolled Heads of Households who do not have a unit currently assigned. To update their unit assignments, you can click directly into their ONE profile using the […] button in the **ONE System Profile** column. Then follow the instructions to [Transfer a Client to a New Unit].



4. **Housing Inventory Snapshot**

a. The **Housing Inventory Snapshot** defaults to a portfolio level view of all site-based housing units in ONE, but users can filter for a specific agency or housing program. Be sure to refresh the report using the **blue circular update arrow** [ ] whenever you update the filters. The count of units in each of the different statuses is displayed.



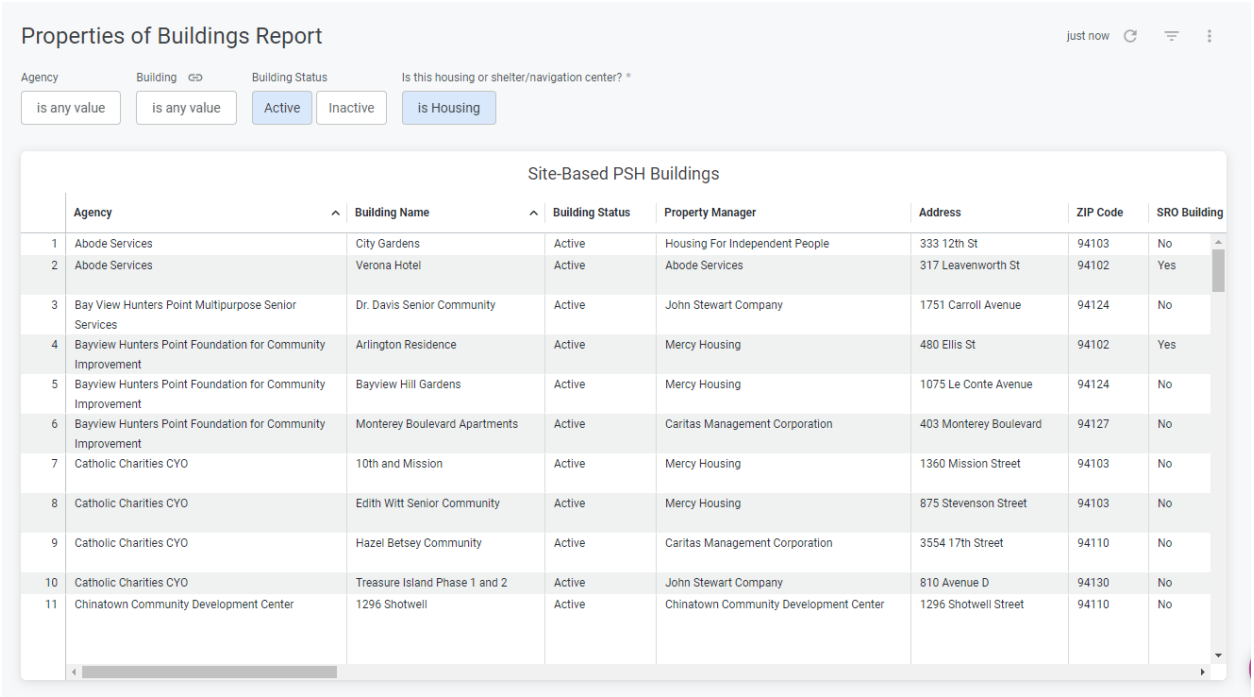
Agency Name	Program Name	Building Name	Total Unit Count	Inactive Units	Offline Units	Status Unknown Units (see report footnote)*	Reported Occupied via Offline Status	Occupied Units	Pending Occupancy Units	Available Units	Program Vacancy Rate (see report footnote)**
Abode Services	City Gardens - HUD PBV	City Gardens	50	0	0	0	0	50	0	0	0%
	City Gardens - Prop C	City Gardens	150	7	1	0	37	102	0	4	3%
	Verona - GF	Verona Hotel	65	0	1	0	0	63	0	1	3%
Bay View Hunters Point Multipurpose Senior Services	Dr. Davis Senior Community-HUD PBV	Dr. Davis Senior Community	23	0	0	0	0	18	0	5	22%
Bayview Hunters Point Foundation for Community Improvement	Arlington Residence - CoC	Arlington Residence	21	0	0	0	0	16	0	5	24%
	Arlington Residence - HUD PBV	Arlington Residence	65	0	0	0	0	57	0	8	12%
	Arlington Residence - LOSP	Arlington Residence	67	0	1	0	19	45	0	2	4%
	Bayview Hill Gardens - CoC	Bayview Hill Gardens	17	0	0	0	0	13	0	4	24%
	Bayview Hill Gardens - HUD PBV	Bayview Hill Gardens	33	0	0	0	0	24	0	9	27%
	Bayview Hill Gardens - LOSP	Bayview Hill Gardens	22	0	0	0	0	21	0	1	5%
	Monterey Boulevard Apartments - LOSP	Monterey Boulevard Apartments	4	0	0	0	0	1	0	3	75%
Catholic Charities CYO	10th and Mission - LOSP	10th and Mission	44	0	0	0	0	41	0	3	7%
	Edith Witt Senior Community - HUD 202	Edith Witt Senior Community	16	0	0	0	0	16	0	0	0%
	Edith Witt Senior Community - LOSP	Edith Witt Senior Community	11	0	0	0	0	10	0	1	9%

b. Use the **Housing Inventory Snapshot by Property Manager** report for the same information as the Housing Inventory Snapshot, but sorted by Property Management organization rather than Support Services.

c. Once you open the Snapshot report, you can filter by Agency or Program. If you do select a filter, hit the round blue arrow button in the top right corner to refresh the report. This report shows the total unit breakdown by program and building. Check to make sure the number of units in each column is correct. You might need to end the offline status of a unit or update the unit associated with a client to ensure these numbers match.

5. Properties of Buildings

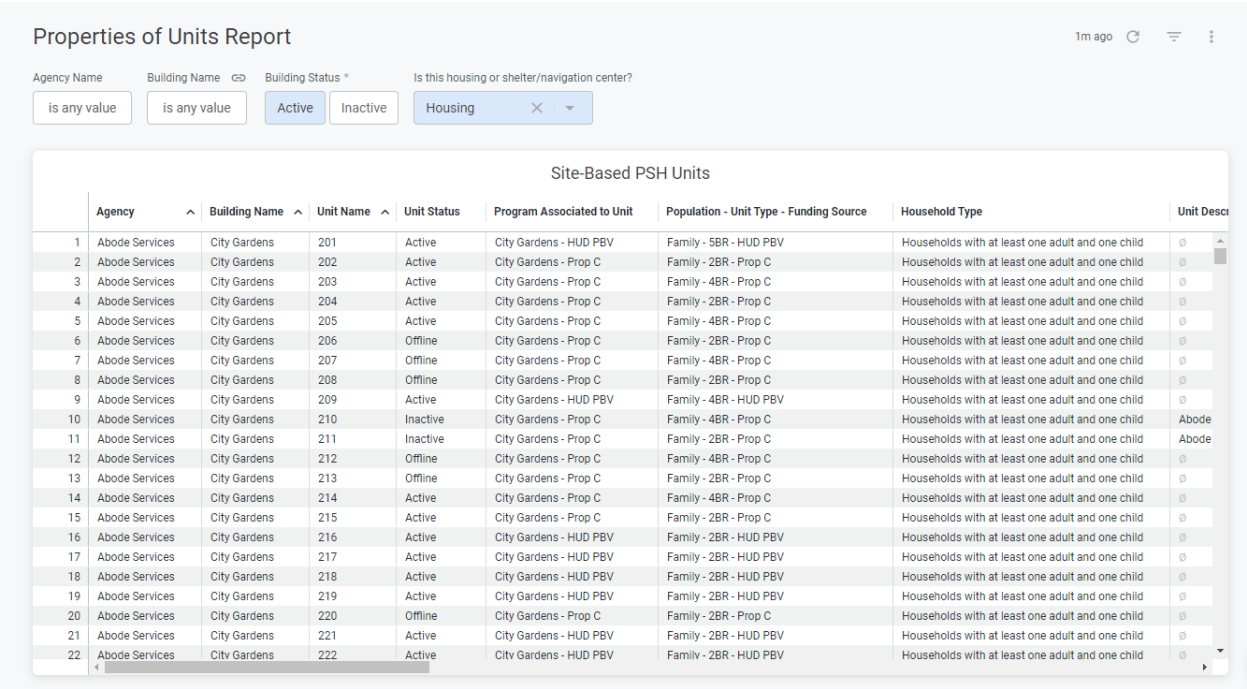
a. The **Properties of Buildings** report allows for all system fields related to building records to be displayed. Be sure to scroll to the right to see all details. It can be filtered by agency, building, or building status. Be sure to refresh the report using the **blue circular update arrow** [ ] whenever you update the filters. If there are any erroneous entries, please let your HSH program manager know as soon as possible.



	Agency	Building Name	Building Status	Property Manager	Address	ZIP Code	SRO Building
1	Abode Services	City Gardens	Active	Housing For Independent People	333 12th St	94103	No
2	Abode Services	Verona Hotel	Active	Abode Services	317 Leavenworth St	94102	Yes
3	Bay View Hunters Point Multipurpose Senior Services	Dr. Davis Senior Community	Active	John Stewart Company	1751 Carroll Avenue	94124	No
4	Bayview Hunters Point Foundation for Community Improvement	Arlington Residence	Active	Mercy Housing	480 Ellis St	94102	Yes
5	Bayview Hunters Point Foundation for Community Improvement	Bayview Hill Gardens	Active	Mercy Housing	1075 Le Conte Avenue	94124	No
6	Bayview Hunters Point Foundation for Community Improvement	Monterey Boulevard Apartments	Active	Caritas Management Corporation	403 Monterey Boulevard	94127	No
7	Catholic Charities CYO	10th and Mission	Active	Mercy Housing	1360 Mission Street	94103	No
8	Catholic Charities CYO	Edith Witt Senior Community	Active	Mercy Housing	875 Stevenson Street	94103	No
9	Catholic Charities CYO	Hazel Betsey Community	Active	Caritas Management Corporation	3554 17th Street	94110	No
10	Catholic Charities CYO	Treasure Island Phase 1 and 2	Active	John Stewart Company	810 Avenue D	94130	No
11	Chinatown Community Development Center	1296 Shotwell	Active	Chinatown Community Development Center	1296 Shotwell Street	94110	No

6. Properties of Units

a. Similar to the Properties of Buildings report, the Properties of Units report allows for all system fields related to individual unit records to be displayed. It can be filtered by agency, building, or building status. Be sure to refresh the report using the blue circular pdate arrow [ ] whenever you update the filters. Be sure to scroll to the right to see all details. If there are any erroneous entries, please let your HSH program manager know as soon as possible.



Properties of Units Report

1m ago

Agency Name: is any value | Building Name: is any value | Building Status *: Active, Inactive | Is this housing or shelter/navigation center?: Housing

Site-Based PSH Units

	Agency	Building Name	Unit Name	Unit Status	Program Associated to Unit	Population - Unit Type - Funding Source	Household Type	Unit Descr
1	Abode Services	City Gardens	201	Active	City Gardens - HUD PBV	Family - 5BR - HUD PBV	Households with at least one adult and one child	∅
2	Abode Services	City Gardens	202	Active	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	∅
3	Abode Services	City Gardens	203	Active	City Gardens - Prop C	Family - 4BR - Prop C	Households with at least one adult and one child	∅
4	Abode Services	City Gardens	204	Active	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	∅
5	Abode Services	City Gardens	205	Active	City Gardens - Prop C	Family - 4BR - Prop C	Households with at least one adult and one child	∅
6	Abode Services	City Gardens	206	Offline	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	∅
7	Abode Services	City Gardens	207	Offline	City Gardens - Prop C	Family - 4BR - Prop C	Households with at least one adult and one child	∅
8	Abode Services	City Gardens	208	Offline	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	∅
9	Abode Services	City Gardens	209	Active	City Gardens - HUD PBV	Family - 4BR - HUD PBV	Households with at least one adult and one child	∅
10	Abode Services	City Gardens	210	Inactive	City Gardens - Prop C	Family - 4BR - Prop C	Households with at least one adult and one child	Abode
11	Abode Services	City Gardens	211	Inactive	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	Abode
12	Abode Services	City Gardens	212	Offline	City Gardens - Prop C	Family - 4BR - Prop C	Households with at least one adult and one child	∅
13	Abode Services	City Gardens	213	Offline	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	∅
14	Abode Services	City Gardens	214	Active	City Gardens - Prop C	Family - 4BR - Prop C	Households with at least one adult and one child	∅
15	Abode Services	City Gardens	215	Active	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	∅
16	Abode Services	City Gardens	216	Active	City Gardens - HUD PBV	Family - 2BR - HUD PBV	Households with at least one adult and one child	∅
17	Abode Services	City Gardens	217	Active	City Gardens - HUD PBV	Family - 2BR - HUD PBV	Households with at least one adult and one child	∅
18	Abode Services	City Gardens	218	Active	City Gardens - HUD PBV	Family - 2BR - HUD PBV	Households with at least one adult and one child	∅
19	Abode Services	City Gardens	219	Active	City Gardens - HUD PBV	Family - 2BR - HUD PBV	Households with at least one adult and one child	∅
20	Abode Services	City Gardens	220	Offline	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	∅
21	Abode Services	City Gardens	221	Active	City Gardens - HUD PBV	Family - 2BR - HUD PBV	Households with at least one adult and one child	∅
22	Abode Services	City Gardens	222	Active	City Gardens - HUD PBV	Family - 2BR - HUD PBV	Households with at least one adult and one child	∅

Managing Households

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

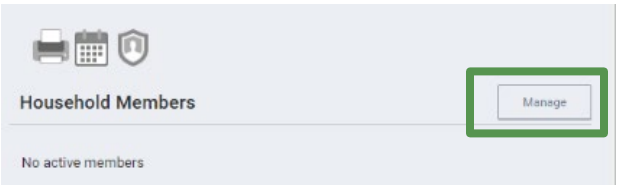
All information below covers specific data requirements for households.

Overview

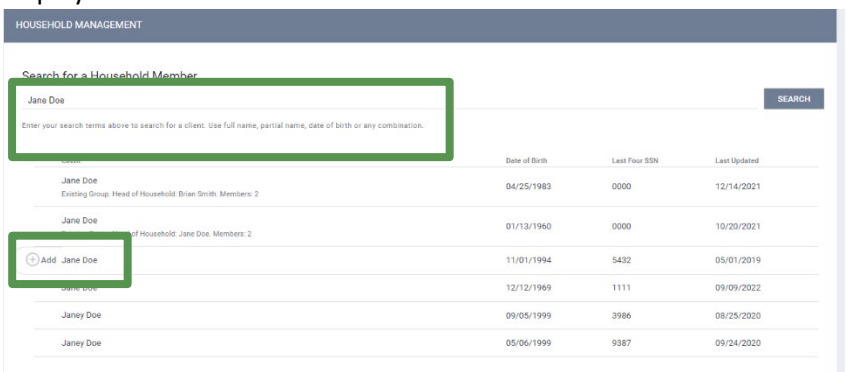
Households need to be correctly connected and associated in ONE to ensure that data is accurate and households jointly receive services as needed. Household composition is defined by the client. Anyone who will be residing in the same unit should be associated in the same household. However, household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

Step by Step

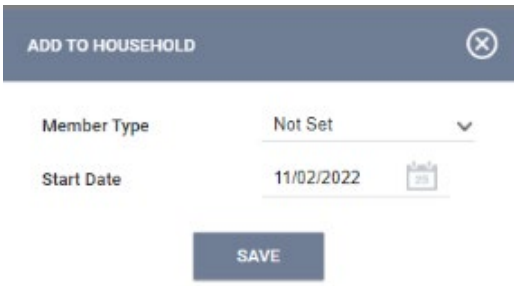
1. Households need to first be connected at the profile level.
   a. New members can be added at the right of the client's profile screen, under **Household Members.** Select **Manage** to begin.



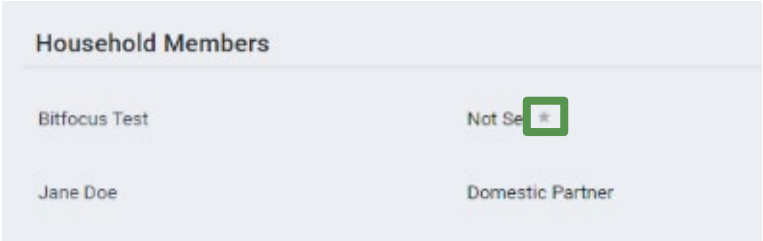
   b. Enter the name of the additional household member into the search bar. Verify you have found the correct person using the date of birth or last four of their SSN, and hover over their name to display the Add button. Select Add.



   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.

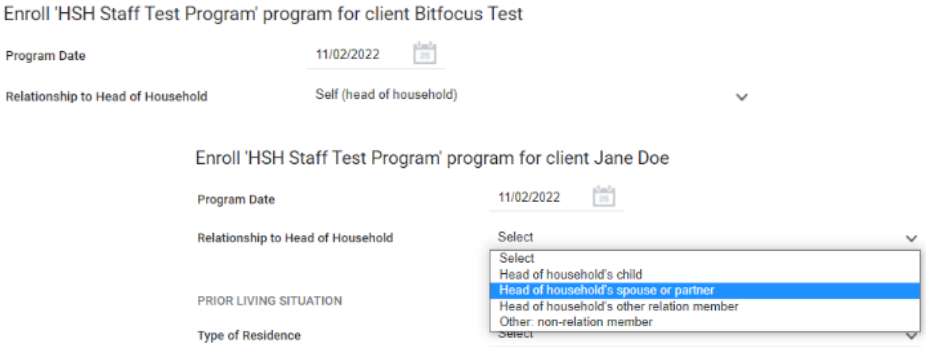


d. Once complete, the household members will be listed on the right side of either client's profile. The individual with the star is designated as the Head of Household. You can then edit the head of household's relationship.



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)**

Housing Move-in: Undefined = Unknown HoH or adjusted Move-in is Null, = 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

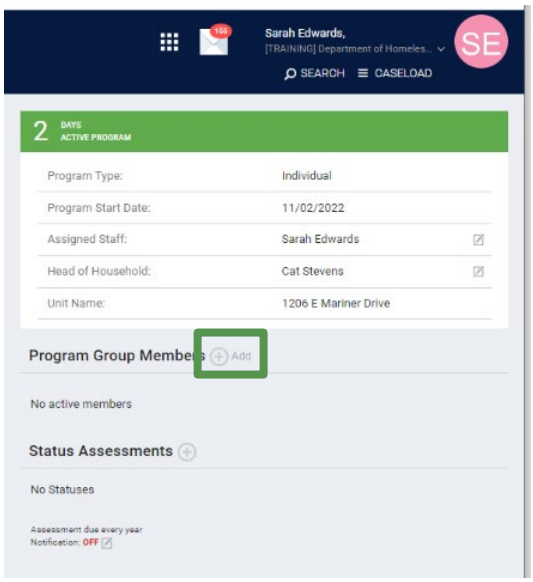
Head of Household (HoH) Unique Identifiers are listed in bold text. Household members are grouped together with the HoH.

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	Bed Assignment	Occupancy Start Date	Occupancy End Date
Program: HSH Staff Test Program - HSH Funding																
Potter, Harry	**7E4332E72**	07/31/1980	42	42	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	202	n/a	11/02/2022	
Potter, Albus	8F831AE70	04/12/2006	16	17	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a		
Potter, Ginerva	65DFA16B1	12/12/1982	39	40	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a		
Test, Bilbocus	560636F23	01/01/1978	44	45	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Doe, Jane	D01CE8CF0	11/01/1994	28	28	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Fox, Freddy	0E70D5AE7	02/12/2001	21	22	11/02/2022	-	60	undefined	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Sponge, Bob	6384CA5F2	01/03/1981	41	42	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Cattikins, Belles	D028D613E	10/27/2007	15	15	11/09/2022	-	53	11/09/2022	0	0	0	L. Asher	n/a	n/a	n/a	n/a
Test, Gabriela	A820A8B6D	01/01/2001	21	22	12/07/2022	12/13/2022	6	undefined	0	0	0	G. Perez	n/a	n/a	n/a	n/a
Test Sr 2, Housing	14FAF7AD9	11/01/1998	24	24	12/12/2022	-	20	12/12/2022	0	0	0	S. Ray	208	n/a	12/12/2022	12/12/2022
Stevens, Cat	FB5D77580	01/01/2001	21	22	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	1206 E Mariner Drive	n/a	11/05/2022	
Hat, Cat	80B972D3C	11/16/1988	33	34	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a

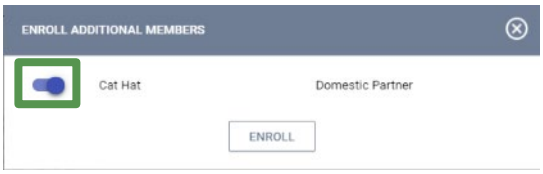
Number of Enrollments: 13
Number of Unique Clients: 13
Number of Households: 10

Total Number of Enrollments: 13
Total Number of Unique Clients: 13
Total Number of Households: 10

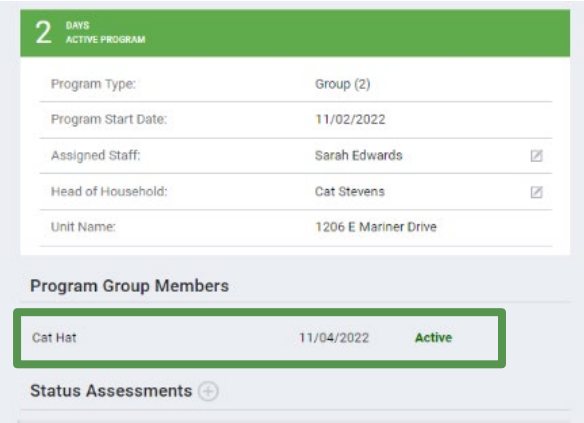
3. If a household member moves in after the head of household, they should be added to the enrollment, rather than enrolled separately.
   a. Open the head of household's program enrollment, and look for Program Group Members on the right side of the screen. Select **(+) Add** to add in the other household 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.



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)**

Housing Move-in: Undefined = Unknown HoH or adjusted Move-in is Null, = Non PH Project, **A:** Assessments, **S:** Services, **CN:** Case Notes
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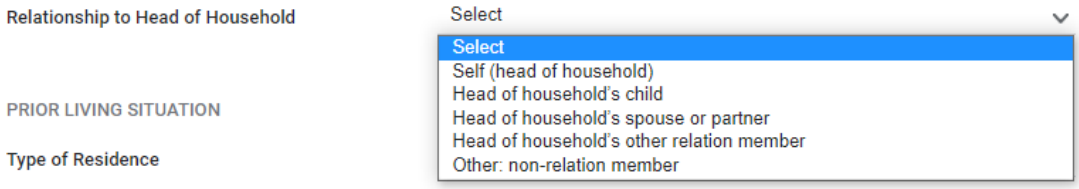
Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff	Unit Assignment	Bed Assignment	Occupancy Start Date	Occupancy End Date
Program: HSH Staff Test Program - HSH Funding																
Crayon, Blue	**8704EB898**	09/12/1998	24	24	11/02/2022	11/02/2022	0	11/02/2022	0	0	0	S. Hoffman	206 Test	n/a	11/02/2022	
Potter, Harry	**7E4332E72**	07/31/1980	42	42	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	202	n/a	11/02/2022	
Potter, Albus	8F831AE70	04/12/2006	16	17	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a		
Potter, Ginerva	65DFA16B1	12/12/1982	39	40	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a		
Test, Bitfocus	**560656F23**	01/01/1978	44	45	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Doe, Jane	D01CE8CF0	11/01/1994	28	28	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Fox, Freddy	**0E70D5AE7**	02/12/2001	21	22	11/02/2022	-	60	undefined	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Sponge, Bob	**6384CA5F2**	01/03/1981	41	42	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Cattikins, Belles	**D028D613E**	10/27/2007	15	15	11/09/2022	-	53	11/09/2022	0	0	0	L. Asher	n/a	n/a	n/a	n/a
Test, Gabriela	**A820A8B6D**	01/01/2001	21	22	12/07/2022	12/13/2022	6	undefined	0	0	0	G. Perez	n/a	n/a	n/a	n/a
Test Sr 2, Housing	**14FAE7AD9**	11/01/1998	24	24	12/12/2022	-	20	12/12/2022	0	0	0	S. Ray	208	n/a	12/12/2022	12/12/2022
Stevens, Cat	**FB5D77580**	01/01/2001	21	22	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	1206 E Mariner Drive	n/a	11/05/2022	
Hat, Cat	**80B972D3C**	11/16/1988	33	34	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a

Number of Enrollments: 13
Number of Unique Clients: 13
Number of Households: 10

Total Number of Enrollments: 13
Total Number of Unique Clients: 13
Total Number of Households: 10

*Note: * denotes Inactive Assigned Staff*

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 and their relationship to the HoH. 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.