

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**.

The screenshot displays the 'Housing Test Agency' interface. The 'REFERRALS' section is active, showing a list of 'Pending Referrals'. A green box highlights the 'Client Test' entry, which is selected. A green arrow points from this entry to the 'Client Test' profile page. On the profile page, the 'PROGRAMS' tab is highlighted with a green box. Another green arrow points from this tab to the 'PROGRAMS: AVAILABLE' section. This section lists several programs: 'Evergreen PSH', 'Homeless Prevention', 'Riverside Rapid Rehousing', 'Test Program', and 'YHDP - Host Home Program'. A green box highlights the 'Test Program' entry, and a green arrow points from it to a dropdown menu icon next to it.

PROGRAMS: AVAILABLE
Evergreen PSH
Homeless Prevention
Riverside Rapid Rehousing
Test Program
YHDP - Host Home Program

Updated 3/5/2024



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.

Client Test

PROFILE

HISTORY

SERVICES

PROGRAMS

ASSESSMENTS

NOTES

FILES

CONTACT

LOCATION

REFERRALS

Test Program

Referrals (90 Days)

1

REFERRAL

100 % Referrals Pending

0 % Referrals Connecte

0 % Referrals Denied

Funding Source

Local or Other Funding Source

Availability

Limited Availability

PROGRAM AVAILABILITY:

Available openings

0

2

Program Placement a result of Referral provided by [TRAINING] Department of Homelessness and Supportive Housing

3

Include group members:

Partner Test

1 pending referral(s). Oldest 33 days.

4

ENROLL

PRINT DIRECTIONS

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.

4
Updated 3/5/2024

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.

Client Test

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM: TEST PROGRAM

Enrollment History Provide Services Units Forms **X Exit**

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.



The screenshot shows the 'Client Test' interface with the 'PROGRAMS' tab selected. A modal titled 'SELECT CLIENTS TO EXIT FROM PROGRAM' is open, featuring two toggle switches: 'Client Test' (which is turned on) and 'Partner Test' (which is turned off). To the right of each toggle is the text 'Significant Other'. At the bottom of the modal is a blue button labeled 'END PROGRAM'. In the background, the 'Program Service History' section is visible, showing a 'Referral: Test Program' with a description '[TRAINING] Department of Homelessness and Supportive Housing referral to Housing Test Agency' and dates '09/19/2022' and '10/23/2022'. A legend at the bottom indicates 'Reservation' (light green), 'Service' (light blue), and 'Referral' (light grey).

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

The dialog box has a title bar that reads 'onesf-train.clarityhs.com says'. The main text inside 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 right, there are two buttons: a blue 'OK' button and a white 'Cancel' button with a blue border.

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.

Unit	Start Date	End Date
Unit 1 Test Program, Test Program	10/23/2022	10/23/2022

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.

PROGRAM: TEST PROGRAM

ADD UNIT +

EDIT UNIT

Start Date: 10/23/2022

End Date: 10/24/2022

< October 2022 >

Su Mo Tu We Th Fr Sa

1

2 3 4 5 6 7 8

9 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28 29

30 31

CANCEL

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

Setting units to offline and ending the offline status to bring those units back to available is an essential part of the housing workflow. 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	Time Offline
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.	Maximum 3 business days
HSG – Building Rehab	Planned building rehab/construction: written notification and timeline submitted to HSH Program Manager prior to setting unit offline.	Varies
HSG – Coroner Hold	The unit is held pending a coroner or medical examiner review, or public administrator notification of next of kin.	30-90 days
HSG – Internal Transfer	The unit is held for an in-program transfer, such as a reasonable accommodation move or other transfer from another unit within the same provider's portfolio.	30 days
HSG – Occupied by Legacy Tenant	The unit is currently occupied by a legacy tenant who is not enrolled in the program in ONE.	Ongoing
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.	Ongoing
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.	30-90 days
HSG – Significant Damage	Unit with significant damage due to fire, flood, or other significant incident.	90 days
HSG/SHLTR – Janitorial/Maintenance	The unit is unavailable for client placement due to janitorial or maintenance needs.	14-30 days
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.	30 days
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.

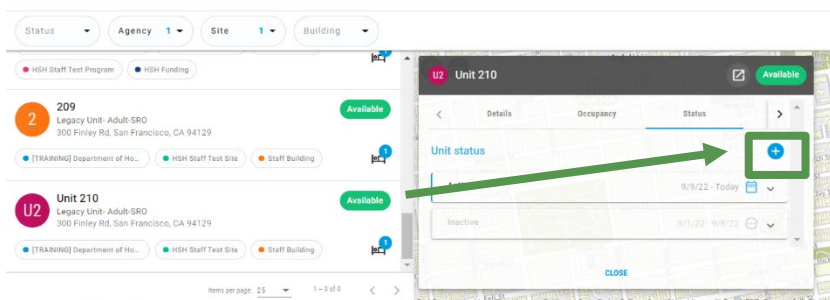
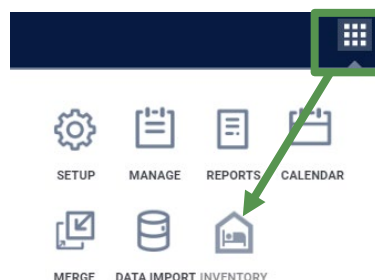
In cases where a client is residing in a unit that needs repairs, the process to [transfer the client](#) should be followed to transfer the client into their temporary unit. The leased unit should be set to offline following the process below. Once repairs are complete, the unit status can be set back 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

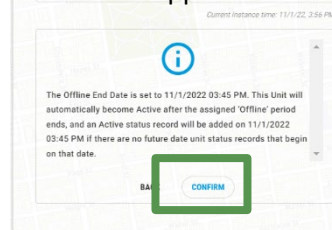
1. When a unit is ready to be marked as Available, open the **Status** section again. Find the most recent **Offline Status**, which will be grey. Click the status entry to expand:

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

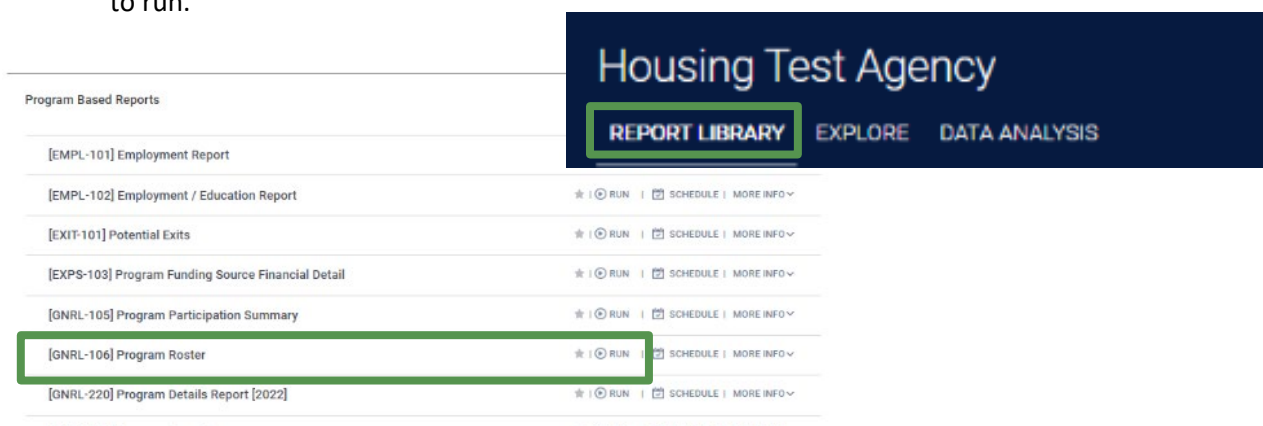
Review rosters weekly or more often to ensure that the information in ONE is accurate. To confirm that clients are associated with their current units in ONE, review the **Program Roster Report**, which now includes the unit numbers associated with a client's program enrollment. This report is available 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

- Under the waffle tool, select **Reports**.
- 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.

REPORT LIBRARY

Program Based Reports > [GNRL-106] Program Roster

Program(s)

Riverside Rapid Rehousing
Test Program
YHDP - Host Home Program
YHDP 3rd Street Homeless Youth RRH Program
YHDP Larkin Street YAC Collaborative

Status
Active within Report Date Range

HoHs Only?
☒ No ☐ Yes

Report Date Range
10/24/2022 - 10/24/2022

Report Output Format
☐ Web Page ☐ PDF - Program ☒ PDF - Program and Unit ☐ Excel

SUBMIT

- 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, Ginevra	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
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
													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

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

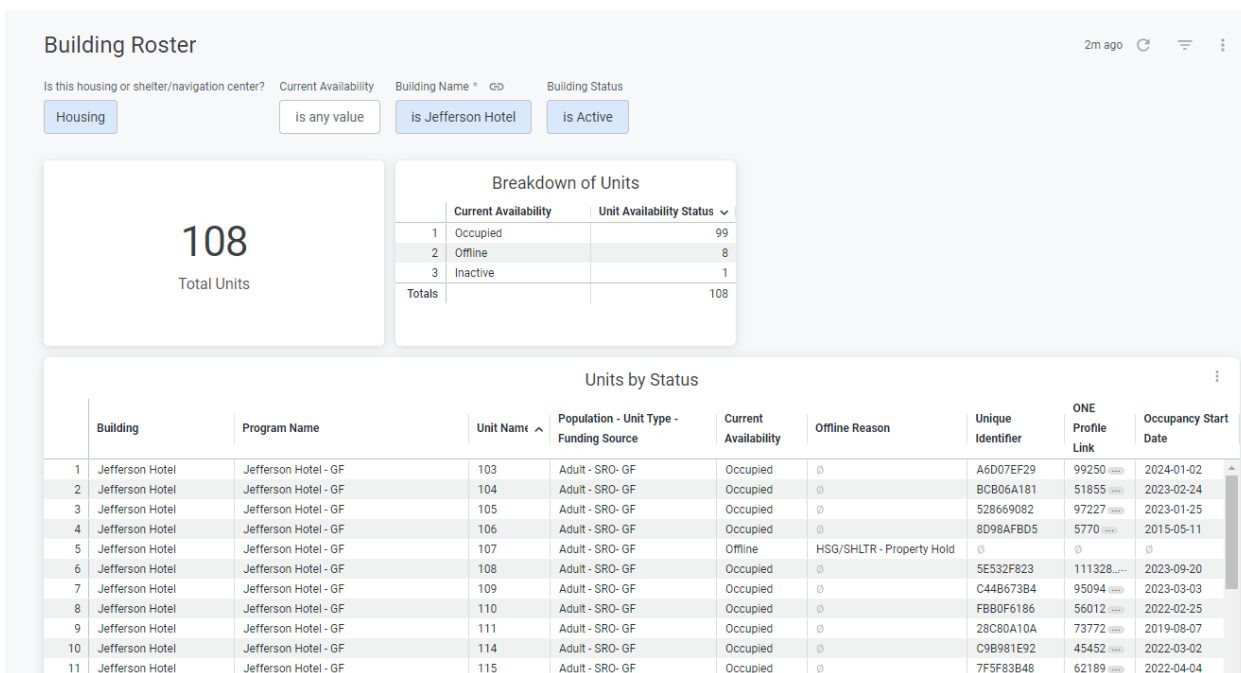
Properties of Buildings/Units: Include information about each building and unit in the ONE System

REPORT LIBRARY EXPLORE DATA ANALYSIS	
Built In Reports	0 report(s) ▾
San Francisco ONE System Reports	68 report(s) ▴
*Inventory - Housing	
Building Roster	⊙ RUN
Housing Inventory Snapshot	⊙ RUN
Housing Inventory Snapshot by Property Manager	⊙ RUN
Housing Inventory Snapshot for HAT Buildings	⊙ RUN
Inactive Units	⊙ RUN
Offline Housing Units by Reason	⊙ RUN
Program Rosters to Verify Unit Assignments - All agencies except ECS, TNDC and THC	⊙ RUN
Program Rosters to Verify Unit Assignments - Episcopal Community Services	⊙ RUN
Program Rosters to Verify Unit Assignments - Tenderloin Housing Clinic	⊙ RUN
Program Rosters to Verify Unit Assignments - Tenderloin Neighborhood Development Corporation	⊙ RUN
Properties of Buildings Report	⊙ RUN
Properties of Units Report	⊙ RUN



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**.



- 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](#).

Program Rosters to Verify Unit Assignments

just now 🔄

Agency Name *

Program

is Tenderloin Housing Clinic

is any value

Select an agency name above to run this report. You can further filter by a specific program, if desired. Please note that the report contains two sections of data (scroll down as needed).

Enrolled Heads of Households with Missing Unit Assignments

This section of the report displays all currently enrolled heads of household with missing unit assignments. Please complete these unit assignments ASAP or exit the client/household if they no longer reside in the building.

	Agency Name	Program Name	Unique Identifier	Client	ONE System Profile	Start Date	Unit Name
1	Tenderloin Housing Clinic	Edgeworth-GF				2013-06-01	Missing
2	Tenderloin Housing Clinic	Edgeworth-GF				2023-02-16	Missing
3	Tenderloin Housing Clinic	Elk Hotel - HSH Fund				2014-08-19	Missing
4	Tenderloin Housing Clinic	Elk Hotel - HSH Fund				2020-01-22	Missing

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.

*Inventory - Housing

Housing Inventory Snapshot

4m ago 🔄

Agency Name

Program Name

is any value

is any value


More + 3

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%
	Dr. Davis Senior Community - HUD PBV	Dr. Davis Senior Community	23	0	0	0	0	18	0	5	22%
Bay View 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%
	10th and Mission - LOSP	10th and Mission	44	0	0	0	0	41	0	3	7%
Catholic Charities CYO	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.

Properties of Buildings Report just now ↻ ⌵ ⋮

Agency Building Building Status Is this housing or shelter/navigation center? *

Site-Based PSH Buildings							
	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 update 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 Building Name Building Status * Is this housing or shelter/navigation center?

Site-Based PSH Units								
	Agency	Building Name	Unit Name	Unit Status	Program Associated to Unit	Population - Unit Type - Funding Source	Household Type	Unit Desc
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.

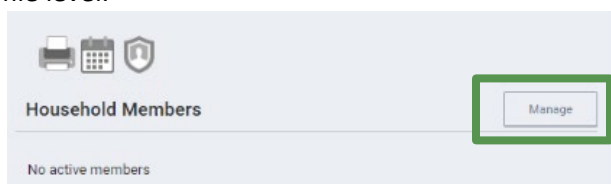
Overview

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.

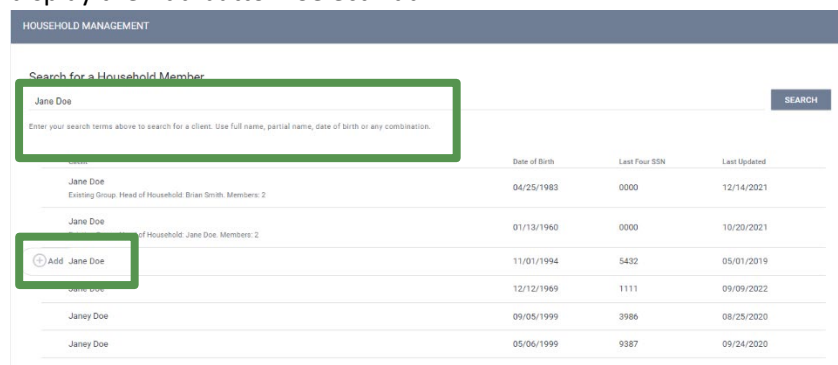
Step by Step

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.

ADD TO HOUSEHOLD

Member Type: Not Set

Start Date: 11/02/2022

SAVE



- 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.

Household Members	
Bitfocus Test	Not Set *
Jane Doe	Domestic Partner

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.

Include group members:

☒ Jane Doe

- 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.

Enroll 'HSH Staff Test Program' program for client Bitfocus Test

Program Date 11/02/2022

Relationship to Head of Household Self (head of household)

Enroll 'HSH Staff Test Program' program for client Jane Doe

Program Date 11/02/2022

Relationship to Head of Household

PRIOR LIVING SITUATION

Type of Residence

Select

- Select
- Head of household's child
- Head of household's spouse or partner
- Head of household's other relation member
- Other: non-relation member

- 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.



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, Billy	670MCR000	05/03/1908	34	34	11/03/2023	11/03/2023	6	11/03/2023	0	0	0	C. McFarlane	206 Trust	n/a	n/a	11/03/2023
Potter, Harry	7E4332E72	07/31/1980	42	42	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	202	n/a	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, Ginevra	65DFA16B1	12/12/1982	39	40	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a		
108C, Gileadus	900620F23	01/01/1976	44	45	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a	n/a	n/a
Doe, Jane	D01CE8CFO	11/01/1994	28	28	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		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
Spang, 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
Cottines, Belles	0D28D613E	10/27/2007	15	15	11/09/2022	-	53	11/09/2022	0	0	0	L. Asher		n/a	n/a	n/a
Test, Gabriela	A820AB6D0	01/01/2001	21	22	12/07/2022	12/13/2022	6	undefined	0	0	0	G. Perez		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	n/a	11/05/2022
Hat, Cat	80B972D3C	11/16/1908	33	34	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards		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.

ENROLL ADDITIONAL MEMBERS

 Cat Hat Domestic Partner

ENROLL

Sarah Edwards,

[TRAINING] Department of Homes...

SEARCH

CASELOAD

2

DAYS

ACTIVE PROGRAM

Program Type:	Individual
Program Start Date:	11/02/2022
Assigned Staff:	Sarah Edwards
Head of Household:	Cat Stevens
Unit Name:	1206 E Mariner Drive

Program Group Members

+

Add

No active members

Status Assessments

+

No Statuses

Assessment due every year

Notification: **OFF**

- 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
---------	------------	--------

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)

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
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
Cattkins, 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

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

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.

Relationship to Head of Household

PRIOR LIVING SITUATION

Type of Residence

Select

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

