Department of Homelessness and Supportive Housing Offline Vacancy Tracker Procedures and Guidelines 2022

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INTRODUCTION

Purpose

The San Francisco Department of Homelessness and Supportive Housing (HSH) has developed an Offline Vacancy Tracker (OVT) to track housing unit vacancies, within the HSH portfolio, for Adult, Family and Transition Age Youth housing and the batching referral process. This process allows property managers a centralized location to post unoccupied units and affords HSH the ability to monitor the length of time a unit remains vacant before it is made available for occupancy in the ONE (Online Navigation Entry) System.

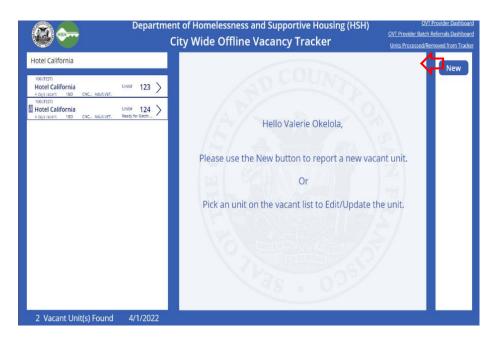
The purpose of this guide is to provide direction on how to use the tool and provide guidance on timeliness of system entries.

Staff Training

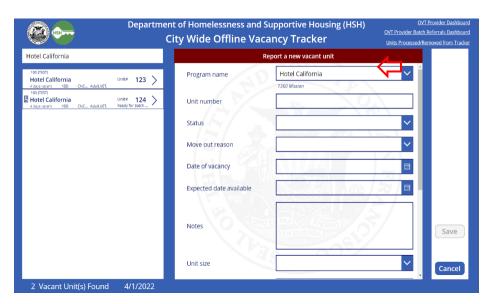
All designated property management staff provided with an OVT license received training in February 2020 prior to the application launch date. Training for new staff can be requested by contacting Valerie Okelola at valerie.okelola@sfgov.org. Training ensures that policies and procedures are fairly, and consistently applied and high-quality services are delivered to households seeking homelessness assistance.

ADD A UNIT TO THE OVT

1. At the home screen, select 'New'.



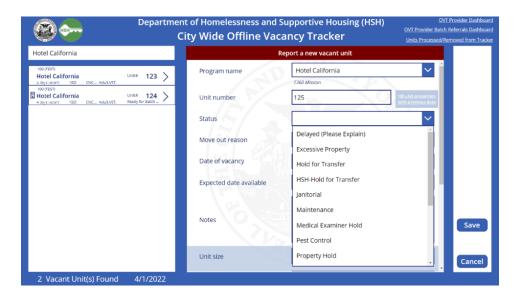
2. Select the appropriate program name from the drop-down menu.



3. Manually type the unit number of the vacant unit.



4. Select the appropriate status associated with the unit.



NOTE: Status options include the following:

- Delayed (Please Explain): Use 'Notes' section to provide an explanation
- Excessive Property: Select this option when a unit has a substantial number of items needing to be removed (hoarding, filth etc.)
- HSH Hold for Transfer: External transfer (HSH holds a unit for a RA Transfer, Life Safety Transfer and change in Household composition)
- Hold for Transfer: Internal transfer- property holds unit for an internal transfer at the site
- Janitorial: Unit requires minor repairs and cleaning
- Maintenance: Unit requires major/substantial repairs
- Medical Examiner Hold: Unit being held by the City's Medical Examiner's Office



- Pest Control: Unit needs to be professionally treated for pests
- Property Hold: Provider placed a hold on the unit for various reasons. The note section should be completed to provide details
- Ready for Inspection: Unit needs to be inspected by San Francisco Housing Authority (SFHA) or Department of Building Inspection (DBI)
- Ready for Referral: Unit is available for occupancy
- Temp Occupied: Unit is temporarily occupied by a resident while repairs to the permanent unit are made

NOTE: Do not use the following status options unless you are entering a unit that is associated with the batching process. (See page 10 for more information on Adding Batch Units to the Offline Vacancy Tracker)

- Ready for Batch No Referral
- Ready for Batch No Referral
- Ready for Batch Pending Referral
- Batch Move-In
- Batch Withdrawn
- 5. Complete fields using the dropdown feature, calendar date selection feature, or by typing the response in the space provided for the following form fields.

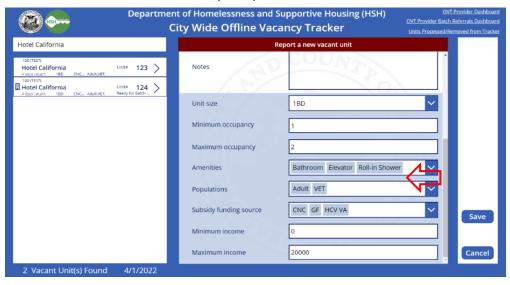




- a. Move out reason
- b. Date of vacancy
- c. Expected date available
- d. Notes
 - a. Include all relevant information on the unit regarding eligibility that is not captured in other fields and an explanation why the unit will be offline longer than expected time frame.
- e. Unit size
- f. Minimum occupancy



- g. Maximum occupancy
- h. Amenities
- i. Population
- j. Funding Sources
- k. Minimum Income
- I. Maximum Income
- 6. Review all data for accuracy
- 7. Select 'Save' to save the vacancy entry.

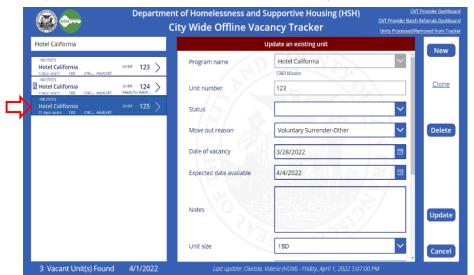


NOTES:

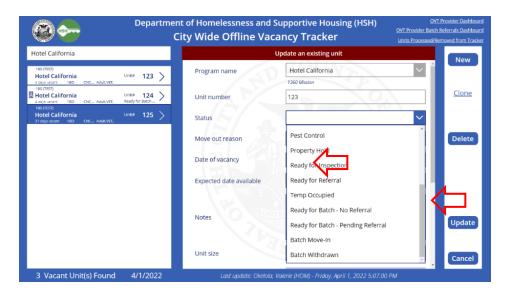
- Save will be disabled if the unit number is a duplicate of a unit currently posted in the Application. Duplications are not permitted.
- Please return to the OVT to update unit status as necessary and save changes.
- To avoid reentering the same information for each vacancy use the clone feature to copy unit information such as program name, amenities, and funding sources. See page 17 for instructions on how to clone a vacant unit.

UPDATING UNITS IN THE OVT THAT ARE READY FOR REFERRAL

1. At the home screen, select the unit that is ready for a referral.



2. Change the status of the vacant unit to 'Ready for Referral' and select 'Update'.

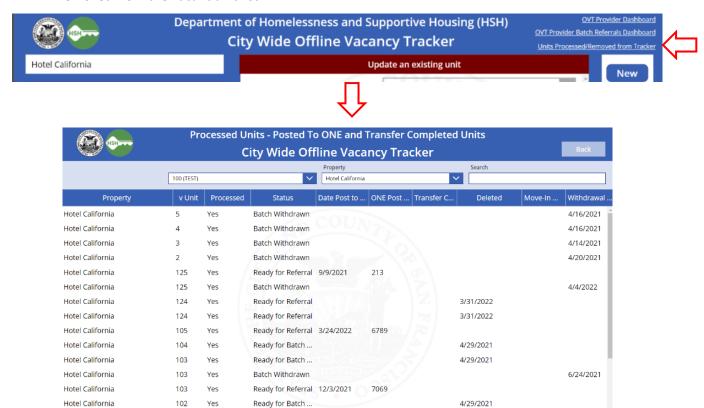


- After updating the vacancy status as, 'Ready for Referral' two new form fields will appear. Enter the date the staff member posted the vacancy into the ONE System.
 - 3.1. Please noted: For the field, ONE posting ID, instead of entering the ONE posting ID, enter the name of the staff member updating this record in the OVT.



4. After selecting, 'Update' the unit will be removed from the vacant units list.

NOTE: If you would like to confirm the information associated with a unit that was updated and removed from the list, select 'Units Processed/Removed from Tracker' to see the unit that was removed from the vacant unit list.



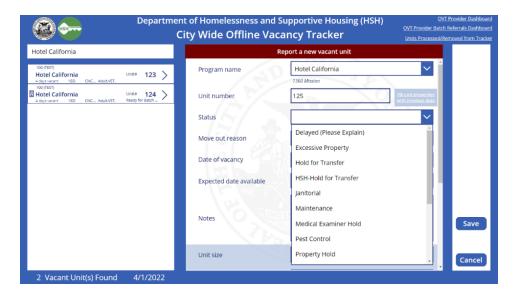
ADD A BATCH UNIT TO THE OVT

Batch Referrals

HSH in partnership with our Provider partners engages with what is known as batch referrals. This entails HSH sending a group of clients to Providers to house from vacant units in their portfolio. HSH uses the OVT to track how many vacant units are available and their status (no referral, pending referral, moved-in or withdrawn).

To add a batch unit to the OVT, complete the following steps.

- 1. See the section titled, 'Add a Unit to the OVT' on page 4 and complete steps 1 through 3.
- 2. Select the appropriate status associated with the unit. When entering a new vacant unit into the OVT, select 'Ready for Batch No Referral' from the status dropdown menu. This is the status that is set initially for all units involved in the batch referral process.



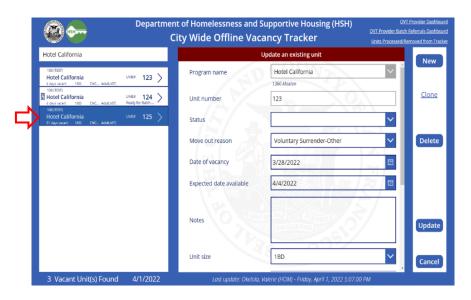
3. See the section titled, 'Add a Unit to the OVT' and complete steps 5 through 7 to complete entry of the batch unit into the OVT.

UPDATING BATCH UNITS IN THE OVT

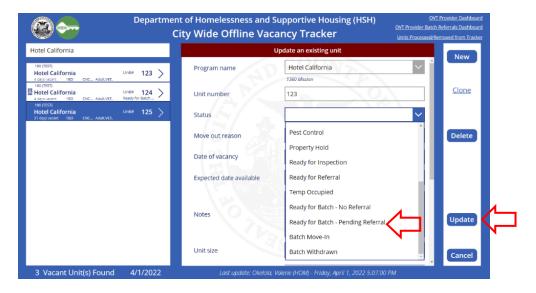
Updating Batch Units in the OVT that are Pending Referral

When a user selects, 'Ready for Batch-Pending Referral' from the status dropdown menu this means that a client has been matched to the unit vacancy and waiting for additional information such as verification or documentation before move-in. To update the status of a unit to 'Ready for Batch-Pending Referral', complete the following instructions.

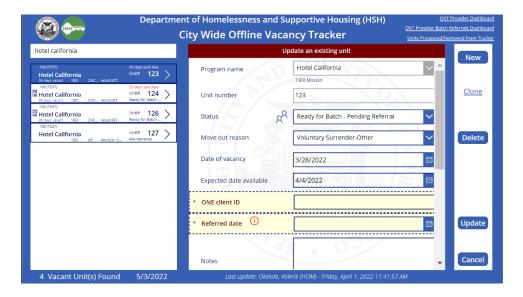
1. At the home screen, select the batch unit that needs to be updated.



2. Select 'Ready for Batch-Pending Referral' from the status dropdown menu and select 'Update'.



3. After updating the vacancy status two new form fields will appear. These fields require information about the ONE client ID and date a referral to the unit was made.

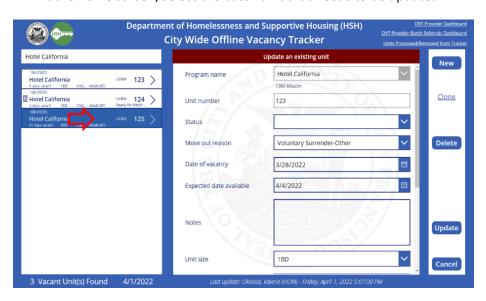


- 4. Log on to the ONE System to obtain the ONE client ID and enter it into the client ID field.
- 5. Enter the referral date for the unit and select update the entry.

Updating Batch Units in the OVT that are Ready for Batch Move-In

When a user selects, 'Batch Move-In' from the status dropdown menu this means that the client has moved into the unit. To update the status of a unit to 'Batch Move-In', complete the following instructions.

1. At the home screen, select the batch unit that needs to be updated.

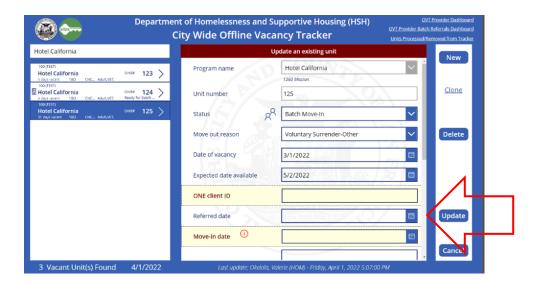


2. Select 'Batch Move-In' from the status dropdown menu and select 'Update'.



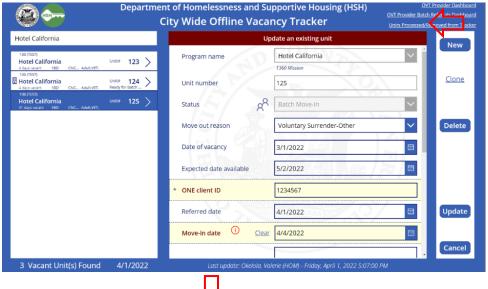


3. After updating the vacancy status as, 'Batch Move-In' three new form fields will appear. These fields require information about the ONE client ID, referral date, and move-in date.

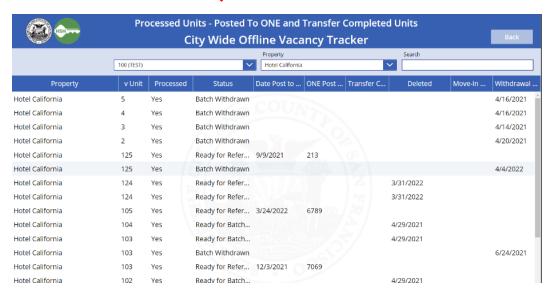


- 4. Log on to the ONE System to obtain the ONE client ID and enter it into the client ID field.
- 5. Enter the move-in date for the unit and select update. After selecting 'Update' the unit will be removed from the vacant units list.

NOTE: If you would like to confirm the information associated with a unit that was removed from the vacant units list, select 'Units Processed/Removed from Tracker' to see the unit that was removed from the vacant unit list.



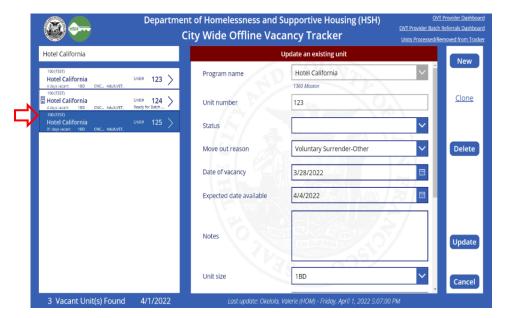




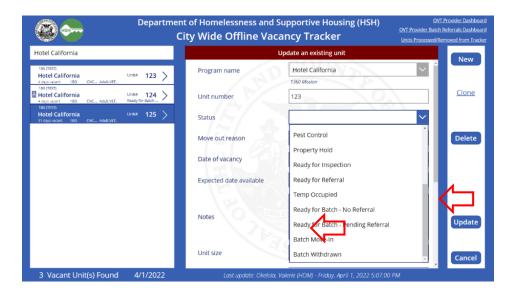
Updating Batch Units in the OVT that Should be Withdrawn from THE OVT

When a user selects, 'Batch Withdrawn' from the status dropdown menu this means that the client refused, is denied, or otherwise withdrew from the unit. To update the status of a unit to 'Batch Withdrawn', complete the following instructions.

1. At the home screen, select the unit that is ready for a referral.



2. Select, 'Batch Withdrawn' from the status dropdown menu and select 'Update'.

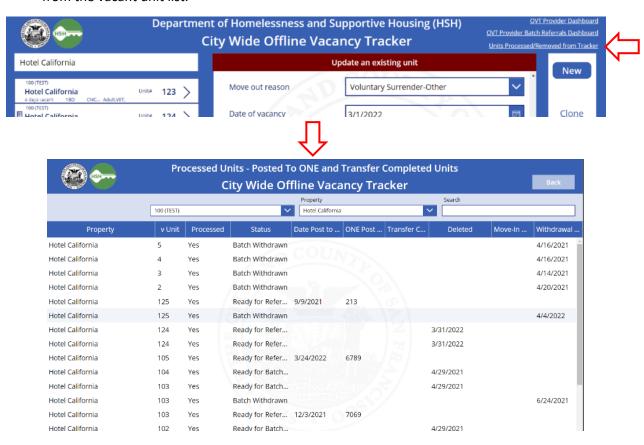


After updating the vacancy status as, 'Batch Withdrawn' a new form field will appear. This fields requires information about the withdrawal date.



3. Enter the withdrawal date and select 'Update'. After selecting 'Update' the unit will be removed from the vacant units list.

NOTE: If you would like to confirm the information associated with a unit that was withdrawn from the list, select 'Units Processed/Removed from Tracker' to see the unit that was removed from the vacant unit list.

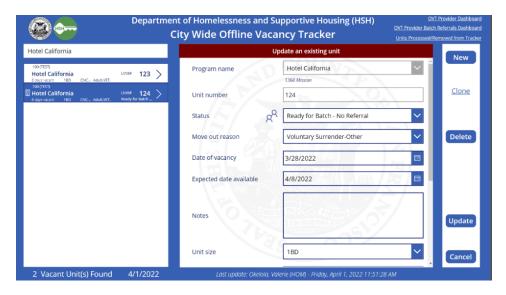




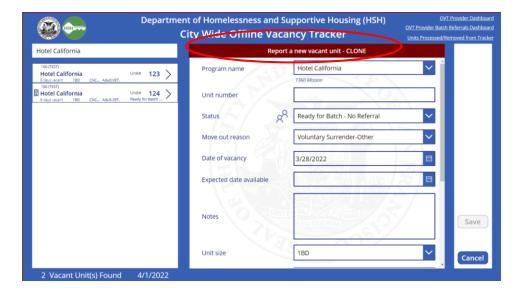
CLONING A VACANT UNIT

The clone feature allows you to copy the information associated with an existing vacancy (such as unit size, amenities, population, etc.) into a new vacant unit. To clone a unit, complete the following steps.

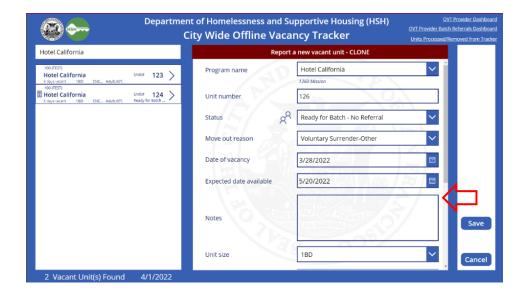
1. At the home screen, select the unit that you would like to copy.



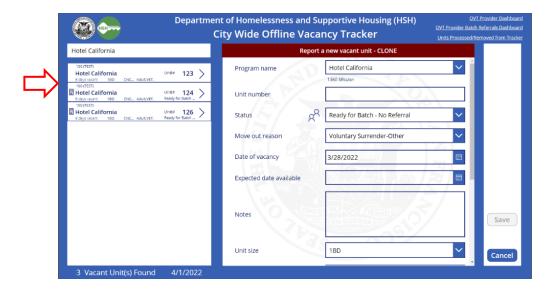
2. Select 'Clone' on the right-hand side of the form. The top of the form should now have a red bar with text that reads, 'Report a new vacant unit – CLONE'.



3. Add information to the form associated with the new vacant unit and select 'Save'.



The unit will appear in the vacant unit list.



DATA ENTRY EXPECTATIONS

It is expected that organizations comply with reporting offline vacancies in the OVT. All offline vacancies should be reported using the OVT and any previous methods of communicating and reporting vacancies, including email, shall no longer be utilized.

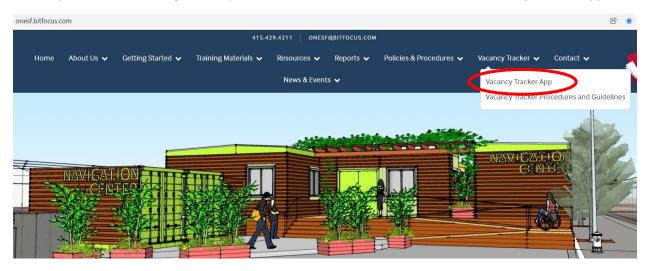
Property Managers will follow a two-step process to report all vacancies:

- Offline units should be posted in the OVT as soon as the unit becomes vacant or at the latest no later than 5pm Friday. However, if a unit is Ready for Referral (or will be within 15 calendar days), provider should enter it directly to ONE (Property Managers should not enter batch units). If there are any issues with timely postings, the HSH program manager administering the contract for the property should be immediately contacted.
- 2. The notes field in the OVT should include all relevant information on the unit and any additional eligibility requirements for posting in the ONE System and an explanation why a unit will not be available for a referral within an expected time frame. Expectations regarding the number of days a unit should be offline are provided in the figure below.

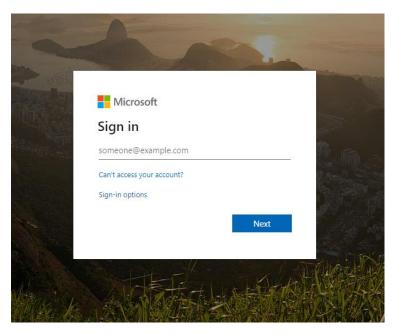
Offline Vacancy Tracker Status	Maximum Length of Time Offline	Additional Information
Coroner Hold	30 days	
Delayed (Explain)	Varies	Notify HSH Program Manager with Detailed Explanation
Excessive Property	30 days	Refers to Abandoned Units; Extreme Cases of Hoarding
Hold for Transfer	14 days	
HSH Hold for Transfer	14 days	
Janitorial	7 days	
Maintenance	14 -30 days	Minor Maintenance -14 days; Major- 30 Days
Pest Control	14-21 days	
Property Hold	14 days	
Ready for Inspection	14 days	Notify HSH Program Manager of Delays/Concerns
Ready for Referral	NA	
Temp Occupied	30 days	Notify HSH Program Manager if Occupancy Will Exceed 30 Days
Fire-Flooding-Other	30-90 days	Notify HSH Program Manager if Occupancy Will Exceed 30 Days

ACCESSING THE OVT

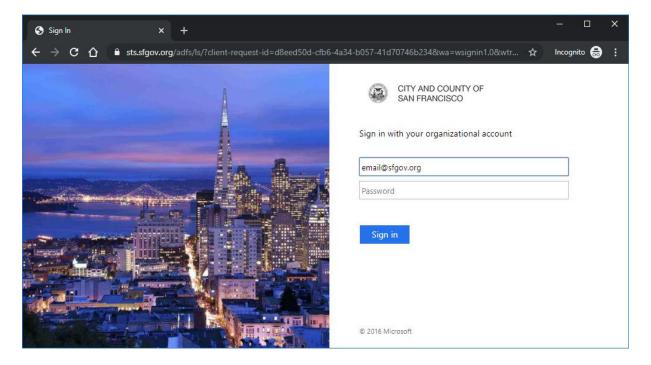
1. On your web browser, go to: https://onesf.bitfocus.com/ and click on the 'Vacancy Tracker App' link.



You will be redirected to a Microsoft 365 login page.



- 2. At sign in, type your sfgov.org email address (<u>username@sfgov.org</u>) and click 'Next'.
- 3. You will be redirected to the City and County of San Francisco sign in portal. Enter your password and click 'Sign in'.

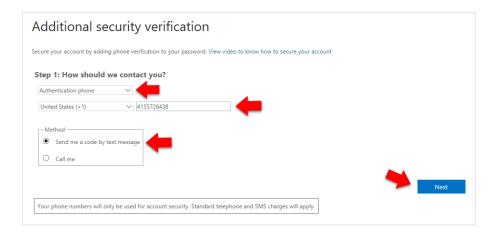


If this is your first time signing into Office 365 (O365), you will be prompted to setup Multi-Factor-Authentication (MFA) for O365 (sometimes referred to as two-step verification process) in which the user provides two different authentication factors to verify identity. MFA will likely require each person to use a separate authenticating mechanism to gain system access, such as a text message or email.

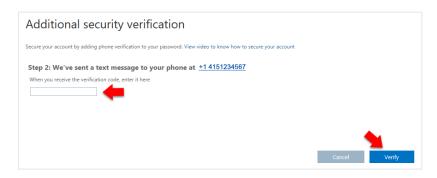
- 4. Please follow the instructions below to set up MFA for O365 using SMS to your mobile phone
 - a. Log into Outlook Web App after MFA has been enabled for your account: http://outlook.com/sfgov.org. Log into your account and when prompted, click the 'Set it up now' button to proceed.



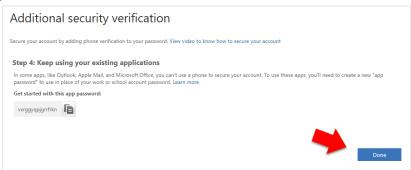
b. Select 'Authentication Phone' in the drop drown menu. Enter mobile phone number and select 'Send me a code by text message'. Click 'Next' to continue.



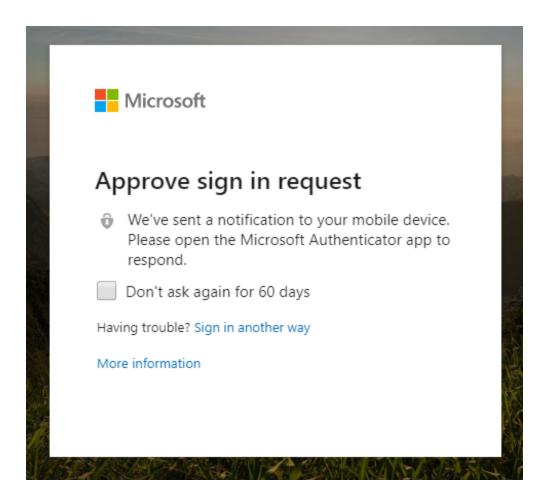
c. You will receive an SMS message to your phone with a verification code. Enter the code and click 'Verify'.



d. Click 'Done'.



5. For the next login attempt, you will be required to complete the MFA process. Enter the code or approve the sign in with Microsoft Authenticator.



SYSTEM REQUIREMENTS

License

 To begin the process, each user must obtain a license to use the system. Licenses are issued by HSH to property management staff or designated personnel. To obtain a license contact Valerie Okelola at valerie.okelola@sfgov.org.

Hardware

 The System is accessible via internet connection and must meet the following requirements:

Operating System

Windows 10 preferred or Mac OS X 10 or later

Web Browser

- Microsoft Edge
- o Google Chrome (most recent 2 versions)
- Mozilla Firefox (most recent 2 versions)
- Mac Safari

Troubleshooting

 If user is unable to access the Vacancy Tracker Application, contact the HSH program manager. HSH Department of Information Technology should not be contacted for login issues. Direct all inquiries to the HSH program manager responsible for the property contract.