

ECS
Mainstream Voucher Program
HUD 811 Training
April 12, 2022



AGENDA

- **Navigating ONE**
- **Program Enrollments**
- **Services**
- **Program Exits**
- **Reports**

Navigating ONE

Navigating ONE - Client Search

- ▶ Search for your client
Search by name , partial name, DOB and SSN
- ▶ If unable to find, create a new profile

SEARCH FOR A CLIENT

ADD CLIENT +

Search by name, partial name, DOB or SSN

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Managed with Clarity Human Services

Recover deleted data

Navigating ONE - Duplicate records

Identifying Duplicate Clients

- ▶ Duplicate clients often have a combination of the same name, Social Security number, birthdate, a misspelled name, etc.
- ▶ If you suspect a duplicate record

Send an email to the Bitfocus help desk - onesf@bitfocus.com

- Provide both Unique Identifiers
- Identify which is the primary record

SEARCH FOR A CLIENT

ADD CLIENT +

christop

	DOB	Age	SSN	ROI
 Christopher Shark	01/01/1999	23	0000	<div>Yes</div>
 Christopher Shahr	01/01/1999	23	0000	<div>Missing</div>

SEARCH

Recover deleted data

Help: How to search for a client



UNIQUE IDENTIFIER
FD9B61683



Navigating ONE - Creating new client records

- ▶ Please make sure to collect as much information as possible, and avoid using “Client refused” or Data Not Collected” whenever possible
- ▶ For existing profiles, review and confirm that all information is correct and update as needed
- ▶ If in a family, profiles must be created for all members of a household

SEARCH FOR A CLIENT

ADD CLIENT +

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

CREATE A NEW CLIENT

Social Security Number

-

-

Quality of SSN

Select

Last Name

First Name

Quality of Name

Select

Quality of DOB

Select

Date of Birth

/

/

Middle Name

None

Gender

Select

Race

Select

Ethnicity

Select

Please fill in Release of Information form



CANCEL


Navigating ONE - Release of Information

When creating a new client profile, ONE will prompt you to have the client sign a Release of Information (ROI) or give verbal consent.

- ▶ The Release of information enter date, should correspond with both the date that the client signed the release and the date you created the client profile.
- ▶ In the next slide we will demonstrate where you can upload the corresponding release of information

RELEASE OF INFORMATION

Permission	Yes	▼
Start Date	01/07/2021	
End Date	01/07/2024	
Documentation	<div>✓ Select Electronic Signature Verbal Consent</div>	

ELECTRONIC SIGNATURE FORM 

By completing this form, you are certifying the client:

- 1) was notified of the Department of Homelessness and Supportive Housing Notice of Privacy Policy
- 2) completed the Release of Information: Homeless Response System as required for the ONE System

Any signed Release of Information forms must be uploaded in client files.

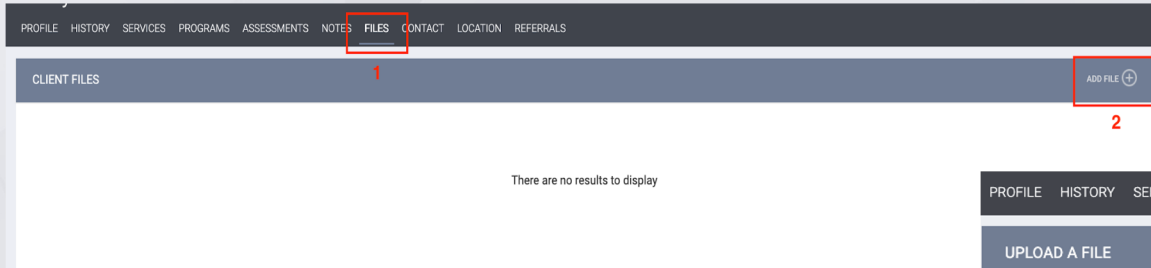
SAVE

CANCEL

Navigating ONE - Release of Information

To upload an ROI:

- ▶ Select the files tab
- ▶ Select the category for Release of Information



The screenshot shows the 'UPLOAD A FILE' form. It has a dark header with the same navigation tabs as the previous screenshot. The form fields are:

- Category:** A dropdown menu with 'Release of Information' selected.
- Predefined Name:** A text field with 'Release of Information: Homeless R' and a dropdown arrow.
- File:** A button labeled 'Select File'.
- Private:** A toggle switch that is currently turned off.

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

Program Enrollments

Program Enrollments

Locate the correct program for enrollment in the Programs tab

Bart Simpson

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

Ja Guerrero Huh
[TRAINING] Episcopal Community S...

SEARCH CASELOAD

ECS-Rapid Rehousing-Prop C	▼
Elm Hotel - HSH Fund	▼
ESG-ECS Shelter Program	▼
Granada Hotel- LOSP	▼
Henry Hotel-CoC	▼
Henry Hotel-GF	▼
Hillsdale Hotel-HSH Fund	▼
Mainstream Voucher Program-HUD 811	▼
Mentone Hotel - HSH Fund	▼

Mainstream Voucher Program-HUD 811

Active Clients

2
CLIENTS

0 % Families

100 % Individuals

Occupancy (Today)

2
UNITS

2 % Checked in

0 % Reserved

98 % Available

Funding Source

Local or Other Funding Source

Availability

Limited Availability

Service Categories:

✓ Housing Search and Placement

PROGRAM AVAILABILITY:

Available openings 0

HOUSING AVAILABILITY:

Households without children 98 Beds in 99 Units

PRINT DIRECTIONS

ENROLL

Program Enrollments

- ▶ Please make sure to collect as much information as possible.
- ▶ Avoid using “Client refused” or Data Not Collected” whenever possible.
- ▶ Data entry should happen within three working days.


Bart Simpson

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

Enroll 'Mainstream Voucher Program-HUD 811' program for client Bart Simpson

Program Date


04/08/2022



COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date

__/__/__



PRIOR LIVING SITUATION

Type of Residence

Place not meant for habitation (e.g., a vehicle, an abandoned building, bu

▼


Length of Stay in Prior Living Situation

90 days or more, but less than one year

▼

Approximate Date Homelessness Started

11/01/2021



Number of times on the streets, in ES, or Safe Haven in the past three years

Three Times

▼

Services

Services

- ▶ Program level services.
- ▶ Some services may have service items listed that will allow you to be more specific about what activity should be captured.

The screenshot displays a web application interface for a user named Bart Simpson. The top navigation bar includes links for PROFILE, HISTORY, SERVICES, PROGRAMS (which is underlined), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this, a header bar indicates the current program: PROGRAM: MAINSTREAM VOUCHER PROGRAM-HUD 811. The main content area features a sub-navigation bar with links for Enrollment, History, Provide Services (highlighted with a red box), Assessments, Notes, Files, Forms, and an Exit button. The 'Provide Services' section is titled 'Services' and contains a list of five service items, each with a dropdown arrow indicating further options:

Services	
Housing Stabilization: Other Contact Attempt	Housing Search and Placement ▼
Housing Stabilization: Successful Contact	Housing Search and Placement ▼
Mainstream Voucher Program Milestones	Housing Search and Placement ▼
Other Outreach Attempt	Housing Search and Placement ▼
Successful Outreach Attempt	Housing Search and Placement ▼

Services

- ▶ Select service
- ▶ Edit event date, enter note if relevant, submit

Housing Stabilization: Successful Contact

Housing Search and Placement ▾

Email Message Received ▾

Housing Stabilization Plan Completed ▾

In-Person Meeting ▾

Phone Call – Case Manager, Other Provider, or Family Member ▾

Phone Call – Client ▾

Text Message Received ▾

Housing Stabilization: Successful Contact

Housing Search and Placement ▾

Email Message Received ^

Event Date 04/08/2022



Service Note :

B

I

1

2

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Services for MSV Program

- ▶ **Three general categories of services:**
 - ▶ **Before participant is housed**
 - ▶ Successful Outreach Attempt
 - ▶ Other Outreach Attempt
 - ▶ **After participant is housed**
 - ▶ Housing Stabilization: Successful Contact
 - ▶ Housing Stabilization: Other Contact Attempt
 - ▶ **Throughout program participation**
 - ▶ Mainstream Voucher Program Milestones

Mainstream Voucher Program Milestones (1)

Mainstream Voucher Program Milestones

Application Status Change

Client Pulled from SFHA MSV Waitlist

Contact with SFHA

Docs Ready

Housing Application Completed

SFHA Annual Recertification Completed

Voucher Briefing

▶ **Application Status Change:**

- ▶ Approvals, denials, appeals; include notes about the status change.
- ▶ Not needed for every approval – purpose is to have a way to document special circumstances related to application status

▶ **Client Pulled from SFHA MSV Waitlist**

- ▶ Enroll someone in the program with as much data as possible and enter this service at the time of an SFHA pull
- ▶ Use date of SFHA waitlist pull, not today's date
- ▶ N/A if someone is not yet in ONE as no ROI is in place
- ▶ Purpose is to support system-wide collaboration to locate & connect clients with MSV opportunity

Mainstream Voucher Program Milestones

Mainstream Voucher Program Milestones

Application Status Change

Client Pulled from SFHA MSV Waitlist

Contact with SFHA

Docs Ready

Housing Application Completed

SFHA Annual Recertification Completed

Voucher Briefing

► **Contact with SFHA**

- To document outreach/correspondence that was not directly with client, rather than in Outreach Attempt category

► **Docs Ready & Housing Application Completed**

- To track completion of these parts of the process as well as be able to review timelines between application submission & approval

► **SFHA Annual Recertification & Voucher Briefing**

- Enter when these milestones are completed either by SFHA or by ECS, with notes



Exits




Exits

- ▶ Exits should be entered when a client is no longer receiving services from the program.
- ▶ Be sure to include an exit destination for the client.
- ▶ Data entry should happen within three working days.









Bart Simpson

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

End Program for client Bart Simpson

Program Exit Date	04/08/2022	
Destination	Staying or living with family, permanent tenure 	
Exit Reason	Exit by client choice 	

DISABLING CONDITIONS AND BARRIERS

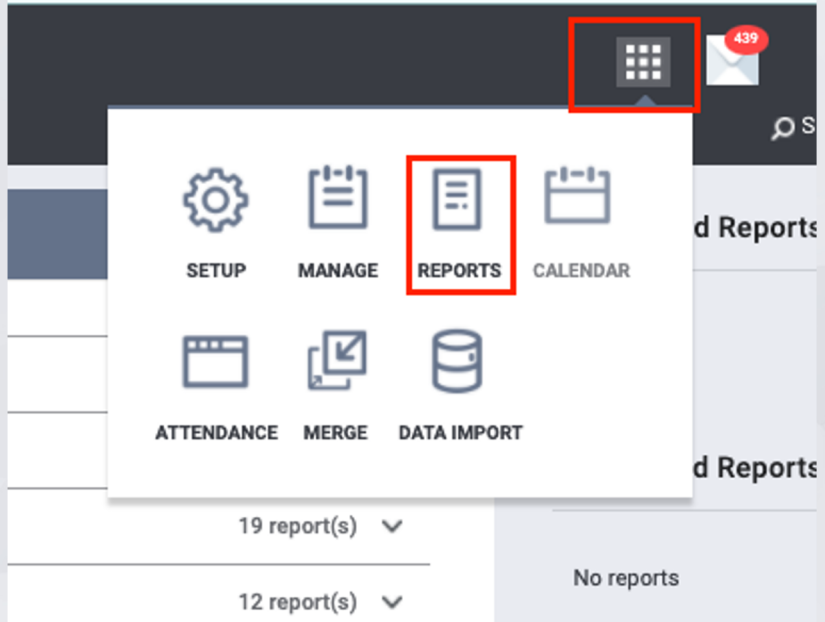
Physical Disability	No	
Developmental Disability	No	
Chronic Health Condition	Yes 	Long Term Yes 
HIV - AIDS	No	
Mental Health Disorder	Yes 	Long Term Yes 
Substance Use Disorder	No	



Reports

Reports

► Launchpad> Reports> Report Library



Reports - Program Roster

[GNRL-106] Program Roster (Program Based Report)

- ▶ Who's stayed in the program
- ▶ Lists program stay information for clients with the selected status in the selected program
- ▶ This report can be run for one or more programs at a time.

REPORT LIBRARY

Program Based Reports > [GNRL-106] Program Roster

Program(s)

Henry Hotel-GF

Hillsdale Hotel-HSH Fund

Mainstream Voucher Program-HUD 811

Mentone Hotel - HSH Fund

Minna Lee- GF

Post Hotel - CoC

Status

Active within Report Date Range

Report Date Range

04/01/2022

25

–

04/08/2022

25

Report Output Format

☒ Web Page

☐ PDF

☐ Excel

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Reports - Program Roster

Program Roster Report

[TRAINING] Episcopal Community Services (ECS)

Active within 04/01/2022 thru 04/08/2022

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](#)

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff
Program: Mainstream Voucher Program-HUD 811												
Seinfeld, Jerry	237B62F5C	01/01/1967	55	55	03/24/2022	-	16	03/24/2022	0	1	0	J. Guerrero Huh
Client, Test	F2830A985	01/01/1993	29	29	03/28/2022	04/04/2022	7	undefined	0	0	0	A. Schneider
Tiger, Sophie	BBD0E6A6F	01/01/1998	24	24	04/08/2022	-	1	undefined	0	0	0	A. Schneider
Simpson, Bart	6EA543244	09/25/2000	21	21	04/08/2022	04/08/2022	0	04/08/2022	0	1	0	J. Guerrero Huh

Number of Enrollments: 4

Number of Unique Clients: 4

Number of Households: 4

Total Number of Enrollments: 4

Total Number of Unique Clients: 4

Total Number of Households: 4

Reports - Service Summary

[GNRL-104] Service Summary (Services Based Report)

- ▶ Total number of clients.
- ▶ Including the total number of unique clients, who received selected services during the report data range.

REPORT LIBRARY

Service Based Reports > [GNRL-104] Service Summary

Service Item(s)

Housing Stabilization: Other Contact Attempt: Text Message Sent

Housing Stabilization: Successful Contact: Email Message Received

Housing Stabilization: Successful Contact: Housing Stabilization Plan Completed

Housing Stabilization: Successful Contact: In-Person Meeting

Housing Stabilization: Successful Contact: Phone Call – Case Manager, Other Provider, or Family M

Housing Stabilization: Successful Contact: Phone Call – Client

Report Date Range

04/01/2022 – 04/08/2022

Report Output Format

☒ Web Page ☐ PDF ☐ Excel

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Reports - Service Summary Report

Service Summary

[TRAINING] Episcopal Community Services (ECS)

Date Range: 04/01/2022 thru 04/08/2022

Housing Stabilization: Successful Contact	Unique Clients	# of Services	# of Service Days
Email Message Received	1	1	1

Fri Apr 8 12:08:48 PM 2022

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HUMAN SERVICES

1 / 1

Resources

Bitfocus Help Desk

onesf@bitfocus.com or (415) 429-4211

ONESF Help Center Web Page

onesf.bitfocus.com

The Help Desk Widget

