Monthly Agency Leads Meeting

San Francisco, May 2023

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TODAY'S AGENDA

Welcome!

2023 HIC/PIT Is Complete!

Refresher: How to Request New User Accounts

Reports Spotlight

System Updates

Upcoming Trainings

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WELCOME!

Icebreaker!

What was your first role in the homeless response system?

Please share name, pronouns, and agency when responding.

2023 HIC/PIT Is Complete

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2023 HIC/PIT is Complete! Thank You!

- Thanks to ALL of you!
- This year's **Housing Inventory Count (HIC) and Point-in-Time (PIT) Count** occurred on January 26, 2023
- Essential for ensuring accurate counts and demographic data for all people experiencing Homelessness in SF
- Do it again next year.

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2023 HIC/PIT is Complete! Thank You!

- 2022 Reports can be found here:

- [2022 SF HIC Report](#)

- [2022 SF PIT Report](#)

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Refresher: How to Request New User Accounts

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What are the Access Roles?

- **Access Roles:** determine the level of access staff have to ONE System functions.

- **Three different kinds** of access role seats: *Enterprise, Manager* and *Admin*

DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING
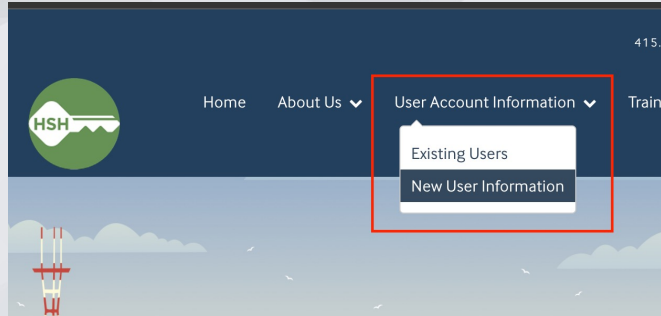
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Access Roles

The following chart is a visualization of the Access Roles and the functions in ONE System they will have permissions to view and/or use.

Access Role	ONE Functions										
	Client Profile	History	Services	Programs	Assessments	Notes	Files	Location	Referrals	Reports	Data Analysis
Front Line Staff	x		x					x			
VSP	x	x	x	x	x		x			x	x
Property Managers	x			x			x		x		
Shelter Staff	x		x	x						x	
Shelter Staff + Client Referrals	x		x	x					x	x	
Shelter Case Manager	x	x	x	x		x	x	x		x	
Shelter Case Manager + Client Referrals	x	x	x	x		x	x	x	x	x	
Housing Program Manager	x	x	x	x		x	x	x	x	x	
Program Supervisor	x	x	x	x	x	x	x	x		x	
Access Partner	x	x	x	x	x	x	x	x		x	
Street Outreach	x	x	x	x	x	x	x	x		x	
SF HOT Navigator	x	x	x	x	x	x	x	x		x	
Agency Lead	x	x	x	x	x	x	x	x	x	x	x
Agency Lead Data	x	x	x	x	x	x	x	x	x	x	x
Back-up Agency Lead	x	x	x	x	x	x	x	x	x	x	x
Access Point Staff	x	x	x	x	x	x	x	x	x	x	x
Access Point Manager/Vets BNL Agency Manager	x	x	x	x	x	x	x	x	x	x	x
Agency Manager	x	x	x	x	x	x	x	x	x	x	x
Housing Case Management	x	x	x	x	x	x	x	x	x	x	x
Navigation Case Management (Assessment)	x	x	x	x	x	x	x	x	x	x	x
HSH Analyst*	x	x	x	x	x	x	x	x	x	x	x
HSH Staff*	x	x	x	x	x	x	x	x	x	x	x
HSH Matchmaking*	x	x	x	x	x	x	x	x	x	x	x
*Only for HSH staff											

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What Trainings do I Need to Take?

- Before Bitfocus can grant a new user access to ONE, they **must complete all necessary trainings** for their access role.

- All access roles are required to complete both the **DPH Privacy Training** and the **ONE System General Training**.

- These trainings must be completed under the new staff's **agency email address**. And can be found on the main onesf.bitfocus.com website.

What Trainings do I Need to Take (cont.)

- Nearly all access roles also require their own individual trainings as well.

- These trainings are assigned based on the agency's role in the HMIS system and the staff member's role in the agency.
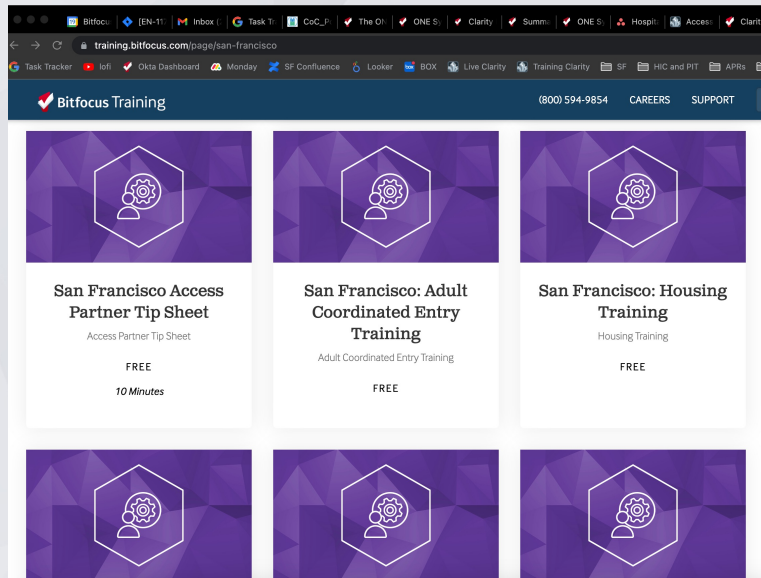
- All trainings must be 100% completed before they are considered finished

- Trainings can be found at: training.bitfocus.com/page/san-Francisco

- Manager level access roles also have their own additional trainings for their specific role

What Trainings do I Need to Take (cont.)

ONE System User Training Requirement Matrix

The following combinations of trainings need to be completed prior to requesting your ONE System User account. Recorded trainings are available on onesf.bitfocus.com. Contact onesf@bitfocus.com for support.

	Clarity General Training	SF DPH Privacy Training	Homelessness Prevention Training	Housing Standardization Training	Problem Solving Training	Adult Coordinated Entry Training	Family Coordinated Entry Training	Youth Coordinated Entry Training	Rapid Rehousing Training	Rapid Enrollment Coordinated Entry Training	Access Partner Training	Family Shelter Training	Navigation Center Training [Denial of Service and Case Management training may be required]	Stabilization Room Training	Flex Pool Training
Outreach	X	X				X									
Shelter	X	X													
Adult Coordinated Entry	X	X				X									
Family Coordinated Entry	X	X					X								
Youth Coordinated Entry	X	X						X							
Problem Solving	X	X			X										
Homelessness Prevention	X	X	X												
Rapid Rehousing	X	X							X						
Permanent Supportive Housing - Providers	X	X		X											
Permanent Supportive Housing - Property Managers	X	X		X											
Care Coordinators	X	X									X				
Navigation Centers	X	X												X	
Access Partners	X	X									X				
Coordinated Entry Access Partner	X	X				X									
SFHOT	X	X												X	

- This matrix can also be found under the "New User Information" section of the onesf.bitfocus.com website.

How Do I Request a New Account?

- *All* new user accounts must be requested by an **Agency Lead**. (Access role changes must also be submitted by Agency Leads)

- *All* new user account requests must be emailed to the onesf@bitfocus.com to create a ticket.

- Please include the new staff's name, email address and requested access role in the request.

- Once the staff's training competitions have been confirmed an account will be created and an email sent to the agency lead and the staff with their login information.
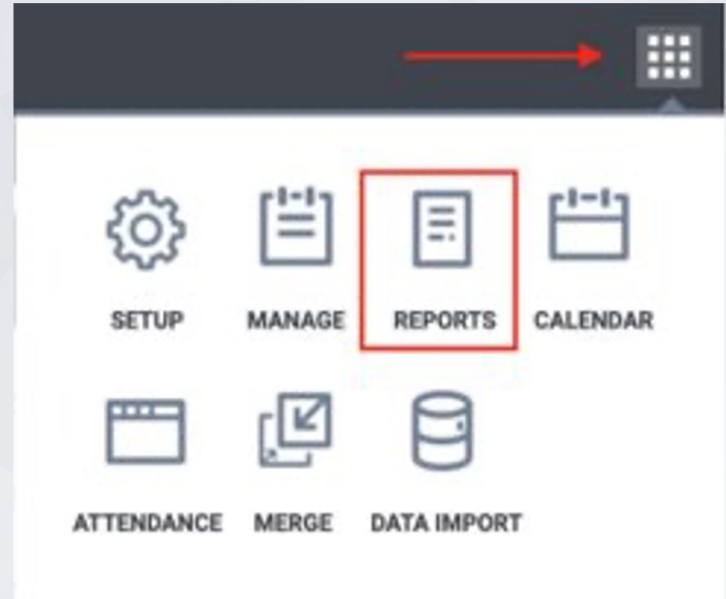
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Reports Spotlight

Today's Highlighted Report

- **[RFRL-103] Referral Statistics - Inbound**

Additional Helpful Reports for Referral Stats

- [RFRL-104] Referral Statistics - Outbound
- [RFRL-102] Referral Outcomes Statistics

[RFRL-103] Referral Statistics - Inbound

- Referral-based report.

- Lists an aggregate count of referrals, broken out by different statuses. This report reports on referral that are referred to the agency running the report.

- Helpful to understand the status of all client referrals into your agency's housing programs.

Referral Statistics - Inbound — **[TRAINING] Compass Family Services**
Date Range: 01/01/2023 thru 05/19/2023

A direct referral is when a client is referred directly to a program regardless of eligibility criteria. Direct referrals are made from the eligibility determination screen of the client's referral tab or from the referrals tab without going to the eligibility screen. Community Queue Referrals are broken down into two columns - Program (reassigned to a program from the Community Queue) and Unit (reassigned to a unit through Unit Queue functionality).

	Direct	CQ Program	CQ Unit	Total
Number of Agency referrals received	1	1	0	2
Pending Referrals				
Number of pending referrals	1	0	0	1
Oldest pending referral in days	591	0	0	591
Newest pending referral in days	591	0	0	591
Average pending referral in days	591	0	0	591
Pending - In Process Referrals				
Number of pending in process referrals	0	0	0	0
Oldest pending in process referral in days	0	0	0	0
Newest pending in process referral in days	0	0	0	0
Average pending in process referral in days	0	0	0	0
Completed Referrals				
Number of referrals resulting in Program enrollment	0	0	0	0
Longest time to connect a referral in days	0	0	0	0
Shortest time to connect a referral in days	0	0	0	0
Average time to connect a referral in days	0	0	0	0
Expired Referrals				
Number of expired referrals	0	0	0	0
Longest time for a referral to expire in days	0	0	0	0
Shortest time for a referral to expire in days	0	0	0	0
Average time for a referral to expire in days	0	0	0	0
Denied Referrals				
Number of denied referrals	0	1	0	1
Longest time to deny a referral in days	0	0	0	0
Shortest time to deny a referral in days	0	0	0	0
Average time to deny a referral in days	0	0	0	0

[RFRL-103] Referral Statistics – Inbound

- Allows drilldown functionality to see more information about the clients in each count.

Referral Statistics - Inbound

Pending Referrals

Number of pending referrals - Direct

Referral Date	Unique ID	Client Name	Program Name	Type	Days Pending
10/05/2021	0276CF56B	West Coast, Ginny	Compass Behavioral Health Team- GF From agency: [TRAINING] Catholic Charities CYO To agency: [TRAINING] Compass Family Services	Direct	591

Total: 1

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System Updates

- ULI (Unit Level Inventory) Phase 3 Go Live is set for June 12, 2023
  - Trainings are upcoming
  - Last day to update the OVT is June 6
- New Transfer Queue is live
  - Will be used by HSH to manage client transfer requests
  - To be used by HSH only

Transfer Queue (HSH Only)

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Upcoming Trainings

Trainings

- **June 7 @ 11am-12:30pm:** Phase 3 Inventory Provider Training – 1

- **June 12 @ 1-2:30pm:** Phase 3 Inventory Provider Training - 2

Announcements

Monthly Office Hours:
- May 23 @ 2pm
- June 27 @ 2pm

Next Agency Leads Meetings:
- June 26 @ 10:30am
- July 26 @ 10:30am

Presenters are welcome!

Registration Links: onesf.bitfocus.com

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Helpful Resources

ONESF Help Center Website

https://onesf.bitfocus.com

Bitfocus Helpdesk

onesf@bitfocus.com

415.429.4211

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Thank You From Your SF Team!

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