

San Francisco ONE System

Agency Lead Meeting

December 6, 2021



TODAY'S AGENDA

- **Welcome**
- **Duplicate Enrollments and Clients**
- **Overlapping Enrollments**
- **Announcements**
- **Resources**

Welcome

What are some helpful tips for preparing for the new year?

Please share name, pronouns, and agency when responding.

Duplicate Enrollments and Clients

Duplicate Enrollments

What are duplicate enrollment

The LSA (Longitudinal Systems Analysis) a report submitted to HUD annually that includes a complex analysis across key projects participating in the Continuum of Care (CoC) ONE System.

Duplicate Enrollments and Clients

What's the issue?

- Early LSA submissions have flagged quite a few data quality errors or warnings
- Several parties have noted multiple agencies creating duplicate client records

Duplicate Enrollments and Clients

Duplicate Enrollments

- These can occur for a variety of reasons including:
 - Returning clients are enrolled with incorrect start dates, making it look like two separate enrollments are duplicate enrollments.
 - Start or end dates on an enrollment get edited to overlap each other.
 - Rather than removing an exit date to reopen an enrollment, users sometimes create a new enrollment with the same or similar start date.
 - Multiple staff entering enrollments for clients without checking the client's history to see whether they've already been enrolled.
 - Client merges that result in enrollments for both clients are assigned to the remaining client, which can result in duplicate enrollments.

Duplicate Enrollments and Clients

Identifying Duplicate Enrollments

- Run Program Roster Report [GNRL-106] at least once a month
- If you have Data Analysis Access:
 - Run a query to identify clients with duplicate enrollments
 - Unsure of how to run a query for this? Contact the Helpdesk

Program Roster Report

Andrea B. Testy Tester Agency

Active within [10/01/2020 - 11/30/2020]

Housing Move-in: Undefined = Unknown HoH or Move-in is Null, ☐ = Non PH Project, A: Assessments, S: Services, CN: Case Notes

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff
Program: Awesome RRH												
Shark, Christopher	FD9B61683	01/01/2000	20	20	07/01/2020	-	153	undefined	0	0	0	A. Bañas
West Coast, Ginny	0276CF56B	04/09/2002	18	18	10/01/2020	-	61	11/15/2020	0	0	0	A. Bañas
Number of Clients: 2												Number of Households: 2
Program: Test MH Program AB												
Shark, Christopher	FD9B61683	01/01/2000	20	20	09/30/2020	-	62	undefined	0	0	0	A. Bañas
West Coast, Ginny	0276CF56B	04/09/2002	18	18	11/05/2020	-	26	11/15/2020	0	0	0	A. Bañas
Number of Clients: 2												Number of Households: 2
Total Number of Clients: 4												Total Number of Households: 4

Duplicate Enrollments and Clients


Correcting Duplicate Enrollments

- When ready to fix the duplicate enrollment(s)
 - Decide which enrollment you want to keep. You can always change enrollment dates and update information, so if you're comparing enrollments and one has annual assessments, family members, and clients notes, while the other has only enrollment screen information, you should keep the more detailed one (Need to compare enrollment data? Use the [GNRL-220] Program Details report.)
 - Update the target enrollment (the one you want to keep) with any missing information from the duplicate enrollment (again, the [GNRL-220] Program Details report can help).
 - Once you've updated any details and moved any services, the duplicate enrollment can be deleted by contacting the Helpdesk.

Duplicate Enrollments and Clients

Identifying Duplicate Clients

- Duplicate clients often have a combination of the same name, Social Security number, birthdate, etc.
- Run [DQXX-110] Duplicate Clients at least once a month
- - More about this report later in the presentation

	Unique Identifier	Name	SSN	Date Of Birth
	E5597309	Lee, Sarah	xxx-xx-3434	08/15/1980
	C3E0E484	Lee, Sarah	xxx-xx-3434	08/15/1980

Duplicate Enrollments and Clients

Correcting Duplicate Clients

- Connect with the Help Desk (please don't attempt to merge!)

Provide the following:

- Unique IDs of records in need of merging
- Identify which is the “primary” record
 - Usually the one with more complete information (more enrollments, services, or the most recent record created).

Duplicate Enrollments and Clients

What happens after duplicate client records are merged?


- Any program enrollments, services, notes, public alerts, files, locations, assessments, and referrals in the secondary client record(s) are transferred to the “primary” record and display in their corresponding tabs and/or the client history tab.
- The unique ID from the secondary record(s) will show under the Alias field and are searchable.
- If any profile data is different only the primary record data is retained

Report Spotlight Review: [DQXX-110] Duplicate Clients

Provides a list of clients enrolled in one of your projects who may have a duplicate record.

To run the [DQXX-110] Duplicate Clients Report:

- Navigate to the Report Library
- Locate [DQXX-110] Duplicate Clients under the Data Quality Reports section
- Choose the Program(s) you wish to include in the report.
- Select active clients or enrolled clients
- Enter the start and end dates for the report
- Click OK

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Overlapping Enrollments

Overlapping Enrollments

During the LSA, we have contacted many agencies asking you to resolve overlapping enrollments.

What is an overlapping enrollment ?

A client's ONE System record shows that the client is housed in more than one shelter or housing program at the same time.

A client can only sleep in one place at a time. ONE System data should reflect this.

Considerations

RRH

- An enrollment into a RRH program is not considered housed. Adding the move-in date will count the client as housed.
- Providing a deposit for a client doesn't necessarily count the client as housed. If you discontinue working with the client before they have moved into their permanent housing location, do not enter a move-in date.

Shelter

- Entry/Exit shelter: an enrollment into the project indicates the client is sleeping there.
- Night-by-night shelters: a bed night indicates the client is sleeping there.
 - Project start date = the first night the client started sleeping at the shelter, record the first bed night.
 - Project exit date = the day after the client's last bed night.

Permanent Housing

- A move-in date indicates that the client is permanently housed and is sleeping in a permanent housing location. Move-in date may be after the Project Start Date.

Example

A client is enrolled in at Buena Vista Horace Mann Family Shelter which is a night-by-night shelter with bed night services recorded from 4/1/20-5/1/20.

The client is also enrolled at Hamilton Family Residence from 4/1/20-6/30/20, which is an entry/exit shelter.

Is this an overlapping enrollment?

Yes, because there are bed nights recorded at BVHM that overlap with the enrollment at Hamilton Family Residence indicating that the client was sleeping in two places at once which is not physically possible.

Example

A client is enrolled in Rapid Rehousing for Adults program with a move-in date of 6/1/20 and the client is still enrolled.

The client is also enrolled in The Auburn HUD VASH program on 7/1/20 with no move-in date and the client is still enrolled.

Is this an overlapping enrollment?

No, this is NOT an overlapping enrollment because the client doesn't have a move-in date for The Auburn. If the client has moved into The Auburn, enter the client's move in date once that occurs.

Example

The client is enrolled in Compass Family Shelter (entry/exit shelter) on 3/1/20 and was exited on 6/1/20.

The client was enrolled in Hamilton HUD Rapid Rehousing (permanent housing) on 5/1/20 with a move in date recorded for the same date, 5/1/20.

Is this an overlapping enrollment?

Yes, because the client is enrolled at a shelter on 5/1/20 indicating they are sleeping there and also have a move-in date into Hamilton HUD Rapid Rehousing which is permanent housing on 5/1/20. If the client didn't move into permanent housing until 6/1/20, enter the move-in date as 6/1/20--start date is still 5/1/20 because that's when Hamilton HUD Rapid Rehousing started working with the client.

Training Topics

Training Topics

What are topics you or your staff would benefit from additional training on?

- Data Quality

Announcements

Announcements

Bitfocus office will be closed December 24, December 31 and January 3rd.

Helpful Resources

ONESF Help Center Website

<https://onesf.bitfocus.com>

Bitfocus Helpdesk

onesf@bitfocus.com

415.429.4211

Thank You From Your SF Team!



**Ja Eun Guerrero
Huh, LCSW
Senior Project
Administrator**



**Andrea Bañas
Deputy Project
Administrator**