



DEPARTMENT OF  
HOMELESSNESS AND  
SUPPORTIVE HOUSING

# Tracking in ONE: Annual Assessments, Eviction Notices & Unlawful Detainers and Exit Reasons

March 30, 2023 & April 5, 2023



# Agenda

- Welcome
- Overview
- Goals
- Expectations
- ONE Demonstrations
- Questions

# Training Goals

- Review new requirements and demonstrate in ONE:
  - Annual Assessments
  - Tracking Eviction Notices & Unlawful Detainers (UDs)
  - Tracking Exit Reasons (including Eviction)
- Review expectations, next steps and timeline
- Answer any questions

# New Requirements in ONE

## • Annual Assessments

- Annual Assessments provide the most up to date information regarding the tenant and progress towards housing stability.

## • Tracking Eviction Notices & Unlawful Detainers (UDs)

- Eviction Notice and Unlawful Detainer Data helps HSH gather trends for both internal and external review and learning. Internally, HSH will use this data to understand eviction and unlawful detainer trends across the system and overlay ONE system demographic data to understand these trends through an equity lens. Externally, HSH can report trends and findings to the Board of Supervisors.

## • Tracking Exit Reasons (including Eviction)

- Exit reasons describe why a person exits PSH and helps HSH and the community understand trends in exits across the PSH portfolio.

**Service providers should collaborate with property management staff to receive information on eviction notices, UD's, and exit reasons to enter into ONE**

# Annual Assessments

## • Purpose

- **Annual assessments** provide the most up to date information regarding the tenant and progress towards housing stability.

## • ONE Entry

- Data entry in the ONE System for *annual assessments* will be completed by support services staff or an agency's designated data entry person. The information to be entered will come from the tenant.

## • Expectations

- Service providers complete an Annual Assessment for each client on their caseload within +/- 30 days of the client's anniversary date – beginning May 2023

# ONE System Demo – Annual Assessments

From the client's profile, click **Programs** tab, then select the program enrollment

There are two methods to complete the **Annual Assessment**

Program Name	Start Date	End Date
Empress - GF PH - Housing with Services (no disability required for entry) [TRAINING] Department of Homelessness and Supportive Housing	11/23/2022	Active

Method 1:

- Click the “+” to the right of **Status Assessments** (located on right hand side of screen)
- In the box that appears, click **Add Annual Assessment**
- Toggle clients then click **Add Annual Assessment**
- Click **Save & Close** when you have completed the assessment

ADD PROGRAM ASSESSMENT

P. Furball

ADD STATUS ASSESSMENT

ADD ANNUAL ASSESSMENT

Method 2:

- Click the **Assessments** tab
- Click **Start** button on **Annual Assessment**
- Toggle name then click **Add Annual Assessment**
- Click **Save & Close** when you have completed the assessment

Enrollment History Provide Services **Assessments** Notes Files Units/Beds Forms X Exit

Assessments LINK FROM ASSESSMENTS

Status Update Assessment	START
Annual Assessment	START

# ONE System Demo – Annual Assessment Warnings

1. Make sure you are listed as an **Assigned Staff** on the client's program enrollment
  - a. If you do not see your name listed, click the **Edit** icon to add yourself, then click **Save Changes**
2. Click the **Edit** icon to toggle on **Assessment due every year** Notification

PROGRAM: EMPRESS - GF

114 DAYS ACTIVE PROGRAM

Program Type:

Program Start Date:

Assigned Staff: [Edit]

Head of Household:

Program Group Members

No active members

Status Assessments (+)

No Statuses

Assessment due every year Notification: ON [Check]

Reservation Service Referral

You can also adjust the timing of when you receive the Annual Assessment due date notifications in User Account Settings

- Click your initials at the top right of the screen, then click **Account Settings**
- At the bottom of the **My Info** screen, toggle on the **Assessment Due Warning**, set the timeframe, click **Save Changes**

# Tracking Eviction Notices & UDs

## • Purpose

- **Eviction Notice and Unlawful Detainer Data** helps HSH gather trends for both internal and external review and learning. Internally, HSH will use this data to understand eviction and unlawful detainer trends across the system and overlay ONE system demographic data to understand these trends through an equity lens. Externally, HSH can report trends and findings to the Board of Supervisors.

## • ONE Entry

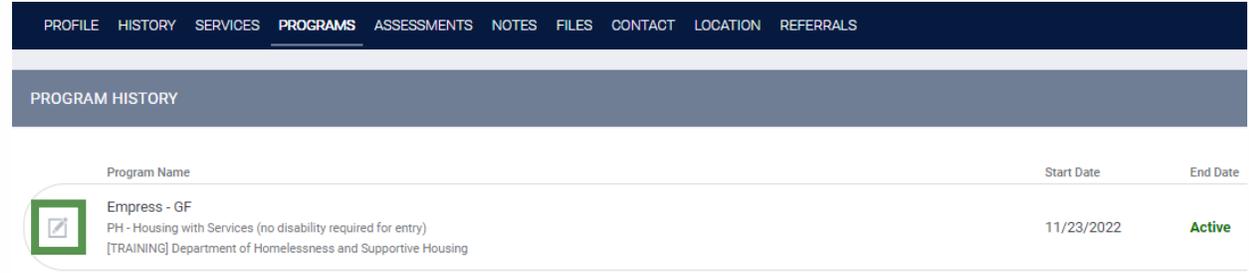
- Data entry in the ONE System for *eviction notices, unlawful detainers, and evictions* will be completed by support services staff or an agency's designated data entry person. The information to be entered will come from property management staff.

## • Expectations

- Service providers should collaborate with property management staff to receive this information and enter into ONE
- All eviction notices and unlawful detainers served on tenants for FY22-23 (7/1/2022 – 6/30/2023) should be entered into the ONE system by July 31, 2023
- Beginning July 2023, all eviction notices and UDs should be entered monthly by the 15th of the following month
  - For example, all eviction notices and UDs served in July 2023 should be entered into ONE by August 15, 2023

# ONE System Demo – Entering Eviction Notices & UD's

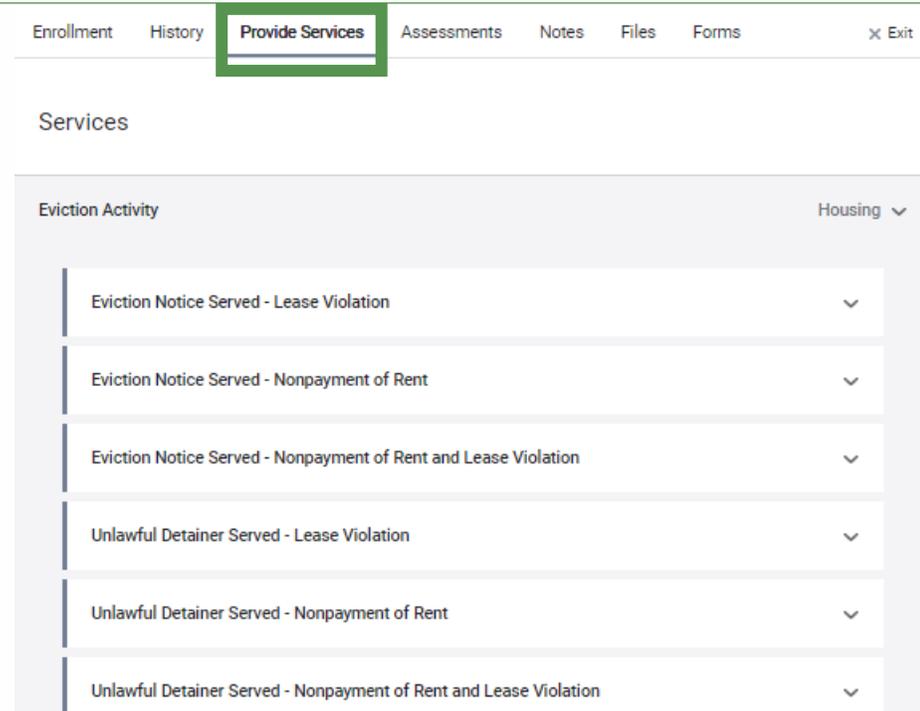
1. From the client's profile, click **Programs** tab, then select the program enrollment



The screenshot shows the 'PROGRAMS' tab in the ONE System interface. At the top, there is a navigation bar with tabs: PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this is a 'PROGRAM HISTORY' section. A table lists program enrollments with columns for Program Name, Start Date, and End Date. The first entry is 'Empress - GF' with a start date of 11/23/2022 and a status of 'Active'. The program name is expanded to show 'PH - Housing with Services (no disability required for entry) [TRAINING] Department of Homelessness and Supportive Housing'.

Program Name	Start Date	End Date
Empress - GF PH - Housing with Services (no disability required for entry) [TRAINING] Department of Homelessness and Supportive Housing	11/23/2022	Active

2. Open the program enrollment
  - a. Select the **Provide Services** tab
  - b. Select the appropriate service from the following:
    - **Eviction Notice Served**
      - Lease Violation
      - Nonpayment of Rent
      - Both Nonpayment and Lease Violation
    - **Unlawful Detainer Served**
      - Lease Violation
      - Nonpayment of Rent
      - Both Nonpayment and Lease Violation



The screenshot shows the 'Provide Services' tab in the ONE System interface. The navigation bar includes: Enrollment, History, Provide Services (highlighted), Assessments, Notes, Files, Forms, and an Exit button. Below the navigation bar is a 'Services' section. A dropdown menu is open, showing a list of services under the heading 'Eviction Activity'. The dropdown is currently set to 'Housing'. The list includes: Eviction Notice Served - Lease Violation, Eviction Notice Served - Nonpayment of Rent, Eviction Notice Served - Nonpayment of Rent and Lease Violation, Unlawful Detainer Served - Lease Violation, Unlawful Detainer Served - Nonpayment of Rent, and Unlawful Detainer Served - Nonpayment of Rent and Lease Violation.

# ONE System Demo – Entering Eviction Notices & UD's

3. After you have selected the appropriate service, complete the following:
  - a. Enter the **Event Date** (this is the date the notice or UD was served on the tenant)
  - b. Click **Submit**

The screenshot shows a web application interface for 'Eviction Activity'. At the top right, there is a dropdown menu labeled 'Housing'. The main content area is titled 'Eviction Notice Served - Lease Violation'. Below this title, there is a form with two main sections. The first section is labeled 'Event Date' and contains a date input field with a calendar icon; this field is highlighted with a green border. The second section is labeled 'Service Note:' and contains a large text area with a rich text editor toolbar (including buttons for Bold, Italic, Bulleted List, and Numbered List). At the bottom right of the form, there is a blue 'SUBMIT' button, which is also highlighted with a green border.

# Tracking Exit Reasons (including Eviction)

## • Purpose

- **Exit reasons** describe why a person exits PSH and helps HSH and the community understand trends in exits across the PSH portfolio.

## • ONE Entry

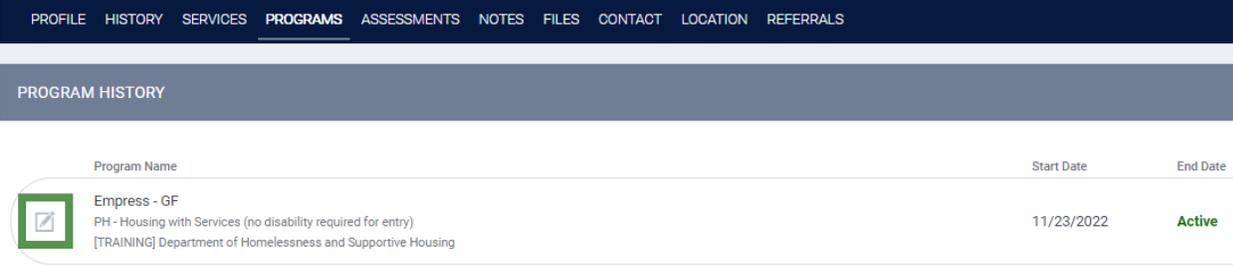
- Data entry in the ONE System for *exit reasons* will be completed by support services staff or an agency's designated data entry person. The information to be entered will come from property management staff.

## • Expectations

- Service providers should collaborate with property management staff to receive this information to include in the program exit
- All exit reasons for eviction should be entered for FY22-23 (7/1/2022 – 6/30/2023) by July 31, 2023
- Exit reasons need to be entered for all PSH exits beginning April 10, 2023
  - This is when the field will go live in the system after the trainings

# ONE System Demo – Entering Exit Reason

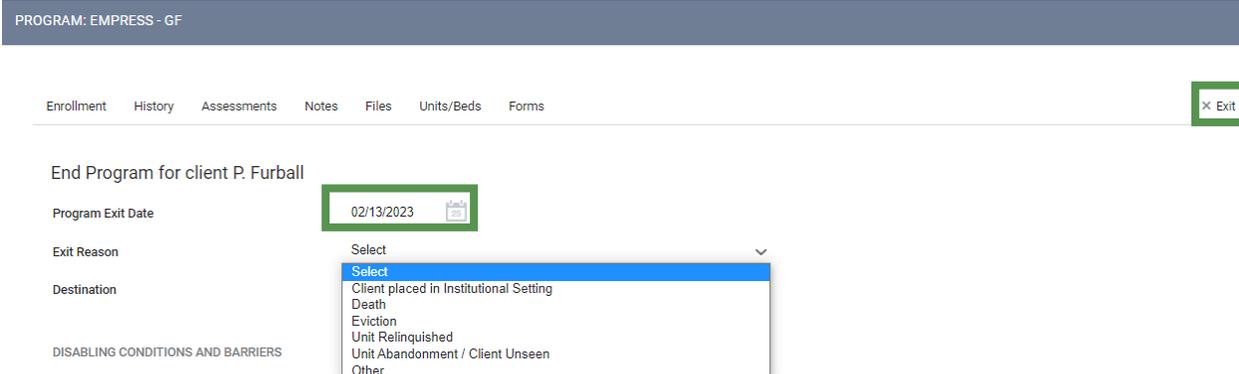
1. From the client’s profile, click **Programs** tab, then select the program enrollment



The screenshot shows the 'PROGRAMS' tab in the ONE System. A table titled 'PROGRAM HISTORY' lists program enrollments. The first entry is highlighted with a green box:

Program Name	Start Date	End Date
 Empress - GF PH - Housing with Services (no disability required for entry) [TRAINING] Department of Homelessness and Supportive Housing	11/23/2022	Active

2. From the enrollment screen, click the **Exit** button and enter the **Program Exit Date**, then select the **Exit Reason** and corresponding **Exit Destination**
- Complete the remaining fields and click **Save & Close**
  - Please do not select “Data not collected” unless absolutely necessary
    - If you must select “Data not collected” and are able to obtain the information after you exit the client, please go back in to the enrollment and complete fields as you receive the information

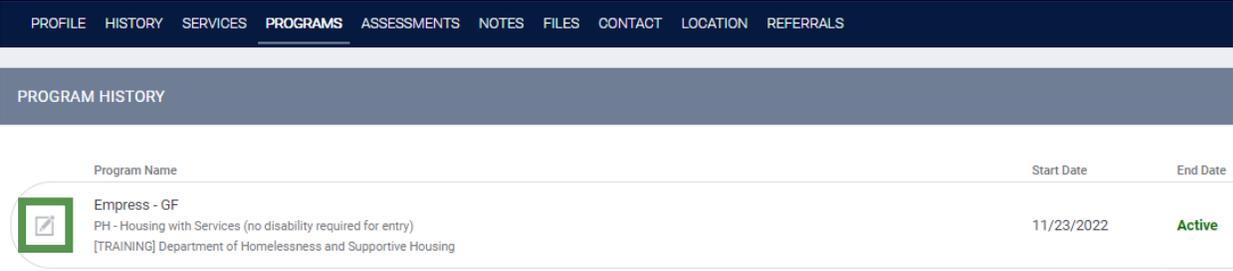


The screenshot shows the 'PROGRAM: EMPRESS - GF' enrollment screen. The 'Exit' button is highlighted with a green box. The 'Program Exit Date' is set to 02/13/2023. The 'Exit Reason' dropdown menu is open, showing options: Select, Client placed in Institutional Setting, Death, Eviction, Unit Relinquished, Unit Abandonment / Client Unseen, and Other.

# ONE System Demo – Re-Opening Program Exit

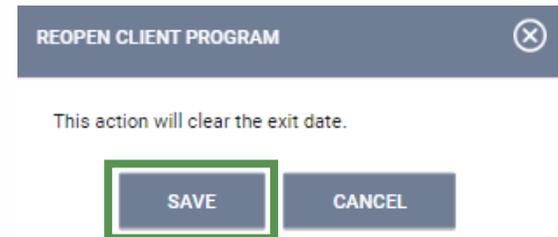
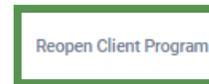
## To enter eviction notices and UDs

1. From the client's profile, click **Programs** tab, then select the program enrollment



Program Name	Start Date	End Date
 Empress - GF PH - Housing with Services (no disability required for entry) [TRAINING] Department of Homelessness and Supportive Housing	11/23/2022	Active

2. From the enrollment screen:
  - a. Click the **Exit** button
  - b. Copy the **Program Exit Date** (you will need to reenter this later and it is easier just to paste it)
  - c. Scroll to the bottom right section of the screen
  - d. Click the button: **Reopen Client Program**
  - e. Click **Save** on the box that pops up to clear the exit date

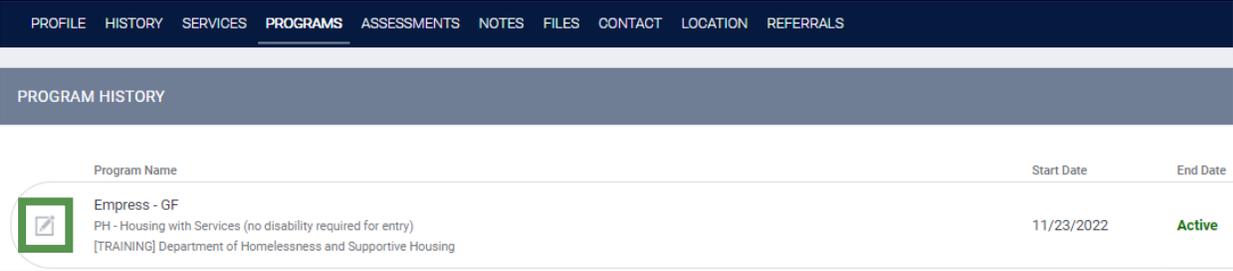


3. Click on the Provide Services tab to enter all eviction notices and unlawful detainers served on tenants since 7/1/2022
4. When you have entered all the eviction notices and UDs for this client:
  - a. Click the **Exit** button again
  - b. Re-enter (or paste) the **Program Exit Date**
  - c. Click **Save & Close**

# ONE System Demo – Re-Opening Program Exit

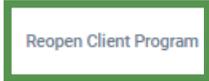
## To enter Eviction as Exit Reason

1. From the client's profile, click **Programs** tab, then select the program enrollment



Program Name	Start Date	End Date
 Empress - GF PH - Housing with Services (no disability required for entry) [TRAINING] Department of Homelessness and Supportive Housing	11/23/2022	Active

2. From the enrollment screen:
  - a. Click the **Exit** button
  - b. Copy the **Program Exit Date** (you will need to reenter this later and it is easier just to paste it)
  - c. Scroll to the bottom right section of the screen
  - d. Click the button: **Reopen Client Program**
  - e. Click **Save** on the box that pops up to clear the exit date



This action will clear the exit date.



3. Select 'Eviction' as **Exit Reason** for all tenants who were exited due to eviction since 7/1/2022
  - a. Complete the required **Eviction Reason** field that will appear
  - b. Re-enter (or paste) the **Program Exit Date**
  - c. Click **Save & Close**

# Next Steps & Timeline

- Enter in ONE: all eviction notices & unlawful detainers served on tenants since July 1, 2022 for Fiscal Year 22-23 (7/1/22 – 6/30/23)
  - Due Date: July 31, 2023
  - Continue entering in the ONE System by the 15<sup>th</sup> of the month following service on the tenant beginning August 15, 2023 (for July 2023 data)
- Enter Eviction as Exit Reason and Eviction Type for program exits due to eviction since July 1, 2022 for Fiscal Year 22-23 (7/1/22 – 6/30/23)
  - Due Date: July 31, 2023
  - Select Exit Reason for all PSH exits beginning April 10, 2023
- Complete Annual Assessments for all PSH Tenants
  - Starting May 2023 and moving forward

# Resources

## 🔑 Office Hours

- Tuesday afternoon, April 11, 2023 at 4-5:00 PM - <https://bitfocus.zoom.us/j/87899615024>
- Wednesday morning, April 12, 2023 at 10-11:00 AM - <https://bitfocus.zoom.us/j/84729538400>

## 🔑 ONE System

## 🔑 Bitfocus SF homepage

## 🔑 Set up ONE account:

- New user completes 3 trainings: BF General Training, SF DPH Privacy Training, and Housing Training
- Agency lead requests new account from the Bitfocus Helpdesk [onesf@bitfocus.com](mailto:onesf@bitfocus.com)
- Complete instructions to set up new users are here: <https://onesf.bitfocus.com/new-user-info>

## 🔑 Housing Training Slides

## 🔑 Bitfocus Help, Training or Technical Assistance

- Schedule TA call with Bitfocus Community Administration team: <https://meetings.hubspot.com/holly-aversano/paulholly>
- Bitfocus holds virtual office hours on the 4th Tuesday of every month from 2 - 3pm
- Help Desk - 5 a.m. to 5 p.m. PST, Monday through Friday and can be reached several ways: [onesf@bitfocus.com](mailto:onesf@bitfocus.com), (415) 429-4211, click the "Help" button to chat on the OneSF support site