



## Access Roles

**This document outlines the new ONE System Access Roles. Access Roles have been determined based on the staff roles, maintaining client privacy and access to ONE functionality needed to do each job.**

Access Role 1- this is the most limited access role. Users with this access role are typically Front Line Staff working at a desk or reception area in a program or housing site. Front Line Staff will have the ability to view the client profile page, services and location. VSP will have the ability to see the client profile page, history, report library and cannot enter any data into ONE. Users with this access role work in the following positions:

- Front Line Staff
- VSP (Only designated VSP agencies Asian Women's Shelter, Safe House, and St. Vincent De Paul-Confidential can request this access role)

Access Role 2- this is a very restricted access role, usually for users who work in property management and manage openings for a housing portfolio. Users with this access role work in the following positions:

- Property Managers

Access Role 3 - staff will have limited access to client information. Users with this access role may need to enter shelter reservation information in ONE. They will have the same access as Access Role 1, with the additional ability to view the programs tab, run reports and use the attendance tool. Users with this access role work in the following positions:

- Shelter Staff

Access Role 4 - This access role is for users who will be providing case management/direct services to clients staying in a shelter. Staff will be able to access all client level information except the assessment tab. This access role has the ability to run reports and use the attendance tool. Users with this access role work in the following positions:

- Shelter Case Manager

Access Role 5 - Housing staff in this role may be responsible for posting open units, processing housing referrals (accepting or denying the referral). Staff will be able to access all client level information except the assessment tab. Users with this access role work in the following positions:

- Housing Program Managers

Access Role 6- This access role is designed for staff who need access to run reports, monitor data quality and see client level information. This is intended for supervisors or access partners who do not oversee housing programs and who do not need access to referral information.



## Access Roles

- Program Supervisor (non-housing program)
- Access Partner

Access Role 7 - This access role is able to see all client level information for ease of care coordination and connection to Coordinated Entry.

Users with this access role work in the following positions:

- Street Outreach
- SFHOT Navigator

Access Role 8- This access role has the least restrictive access in ONE. It is designated for staff that have access to all client level information, referrals and may need matchmaking functionality. Users in this role may need access to information entered by agencies other than their own for purposes of Coordinated Entry. Some users with this level of access will have data analytics information. Some users with this access roles may have data analytics information. Users with this access role work in the following positions:

- Access Point Staff
  - Access Point Manager
  - HSH Staff\*
  - Agency Lead
  - Analyst\*
  - Back-Up Agency Lead
  - Housing Case Managers
  - HSH Matchmaking\*
  - Agency Lead Data
- \* Only for HSH Staff



## 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 Levels	Staff roles	Client Profile	History	Services	Programs	Assessments	Notes	Files	Location	Referrals	Reports
1	Front Line Staff	x		x					x		
2	Property Managers	x			x			x		x	
3	Shelter Staff	x		x	x						x
4	Shelter Case Manager	x	x	x	x		x	x	x		x
5	Housing Program Manager	x	x	x	x		x	x	x	x	x
6	Program Supervisor Access Partner	x	x	x	x	x	x	x	x		x
7	Street Outreach	x	x	x	x	x	x	x	x		x
8	Access Point Staff Access Point Manager/ Vets BNL Agency Manager HSH Staff HSH Analyst Agency Lead Agency Lead Data Back-up Agency Lead Housing Case Manager HSH Matchmaking HSH Data	x	x	x	x	x	x	x	x	x	x