



Housing Support Plan Assessment Training

Agenda

HSH Overview

Creating a Housing Support Plan

Viewing and Editing an Existing Housing Support Plan

Reporting

Resources



DEPARTMENT OF
HOMELESSNESS AND
SUPPORTIVE HOUSING

Housing Support Plan Overview

What is the Housing Support Plan?

- HSH's standardized care plan which incorporates S.M.A.R.T. goals and client-centered strategies to help clients maintain housing stability and retention after permanent housing placement.



Building a Coordinated System with a Care Plan

- The HSP creates an integrated and accountable system by increasing service provider collaboration.
- It is evidence of structured and intentional Case Management



Impact and Accountability

- The HSP provides a clear narrative that meaningful, client-centered work is being done
- Improves client outcomes by centralizing client care so all providers share the same understanding of needs, goals, and progress
- Supports performance measurement by showcasing progress and impact towards HSH's strategic plan





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Compliance & Privacy

Compliance Standards

- The Housing Support Plan is HSH's Care Plan. It is an Appendix A requirement for programs providing case management
- The Housing Support Plan also measures HSH's progress towards goals outlined in the Home By The Bay Strategic Plan.
- The Housing Support Plan is a CalAIM requirement for all individuals accessing CalAIM eligible services



Privacy

- HSH operates as a coordinated system of care by allowing access to Housing Support Plans to a network of contracted providers to improve client outcomes
- Housing Support Plans should only be accessed by individuals directly involved in client care



Documentation Expectations



Which Clients Need an HSP?

- All clients housed in Scattered Site or Site-Based PSH receiving case management should have a HSP in the ONE System



Completing and Updating the HSP

- All clients should have an HSP completed within 30 days of move-in
- The HSP should be updated when client's status changes or goals are updated
- A new one can be created if a client's circumstances change
- The HSP documents that case management is occurring, even if client is unable to collaborate on the plan



HSP Duration

- The HSP can be used for care planning indefinitely
- Program specific engagement policies determine when providers should revisit HSH care plans or every 6 months, at minimum.



When to Revisit the HSP?

- When the client's goal status has changed
- A client has a change in case management needs
- When the program engagement policy requires care plans be revisited
- **Every 6 months at minimum**



Sources that Guide the HSP

- Direct conversations with the client
- Provider's Internal Care Plans
- Provider-to- provider collaboration
- Standard program workflow and best practices
- Observations or indicators suggesting case management is necessary



Completing an HSP when a Client is Unavailable to Collaborate

- A Housing Support Plan should always be completed if case management is ongoing
- Use internal care plans, provider-to-provider collaboration, standard workflow, and observations to inform the HSP
- Follow up with client to maintain a client-centered relationship



Timeline

- The Housing Support Plan is live in the ONE System now (February 3, 2026)
- A housing support plan should be created for all clients requiring case management moving forward

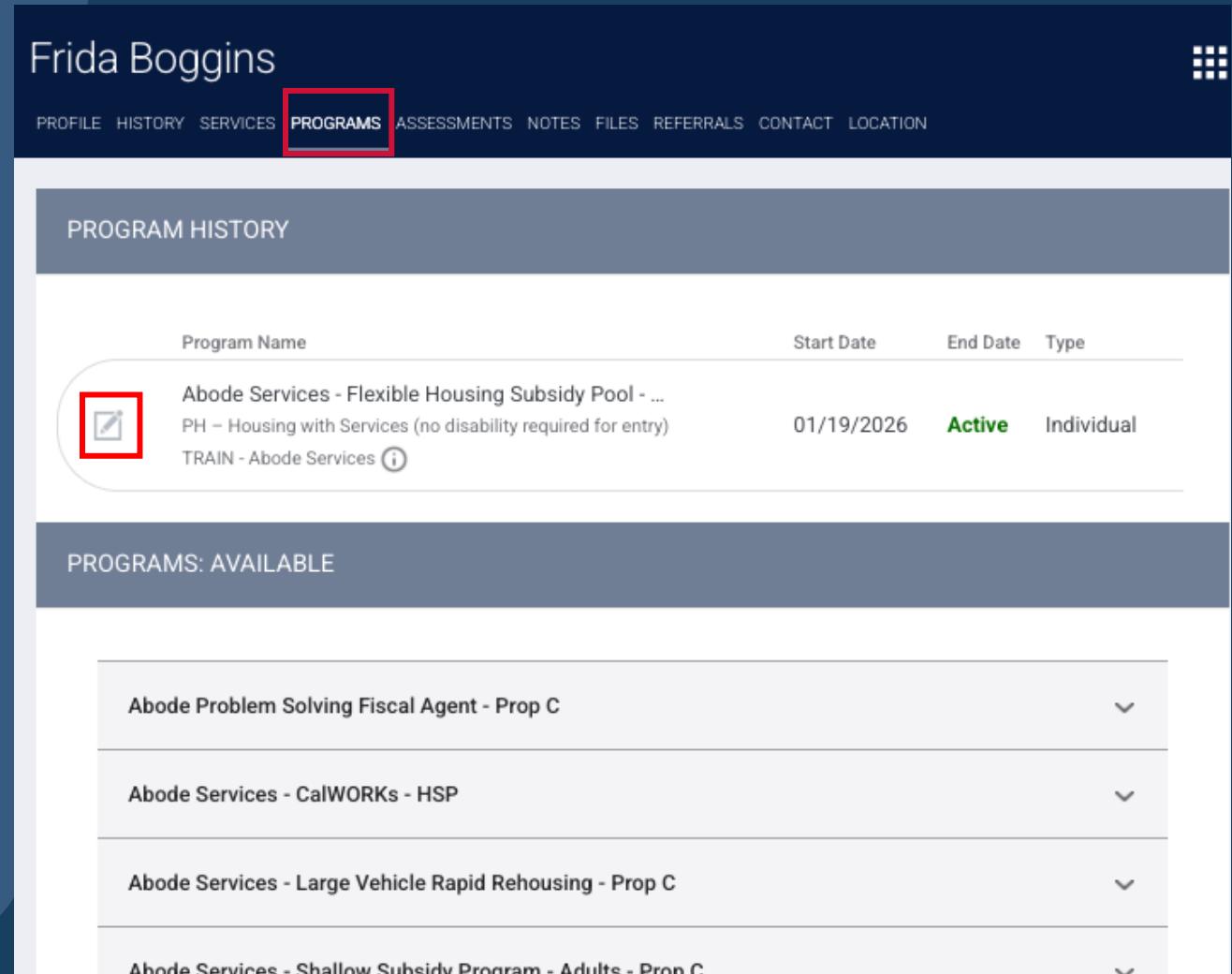




Creating a HSP Assessment

Creating a HSP Assessment

- > Click on the Programs tab from the client profile.
- > Select the program under which you will add a HSP assessment
- > Click on the pencil and paper icon next to the program name to enter the program enrollment



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PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES REFERRALS CONTACT LOCATION

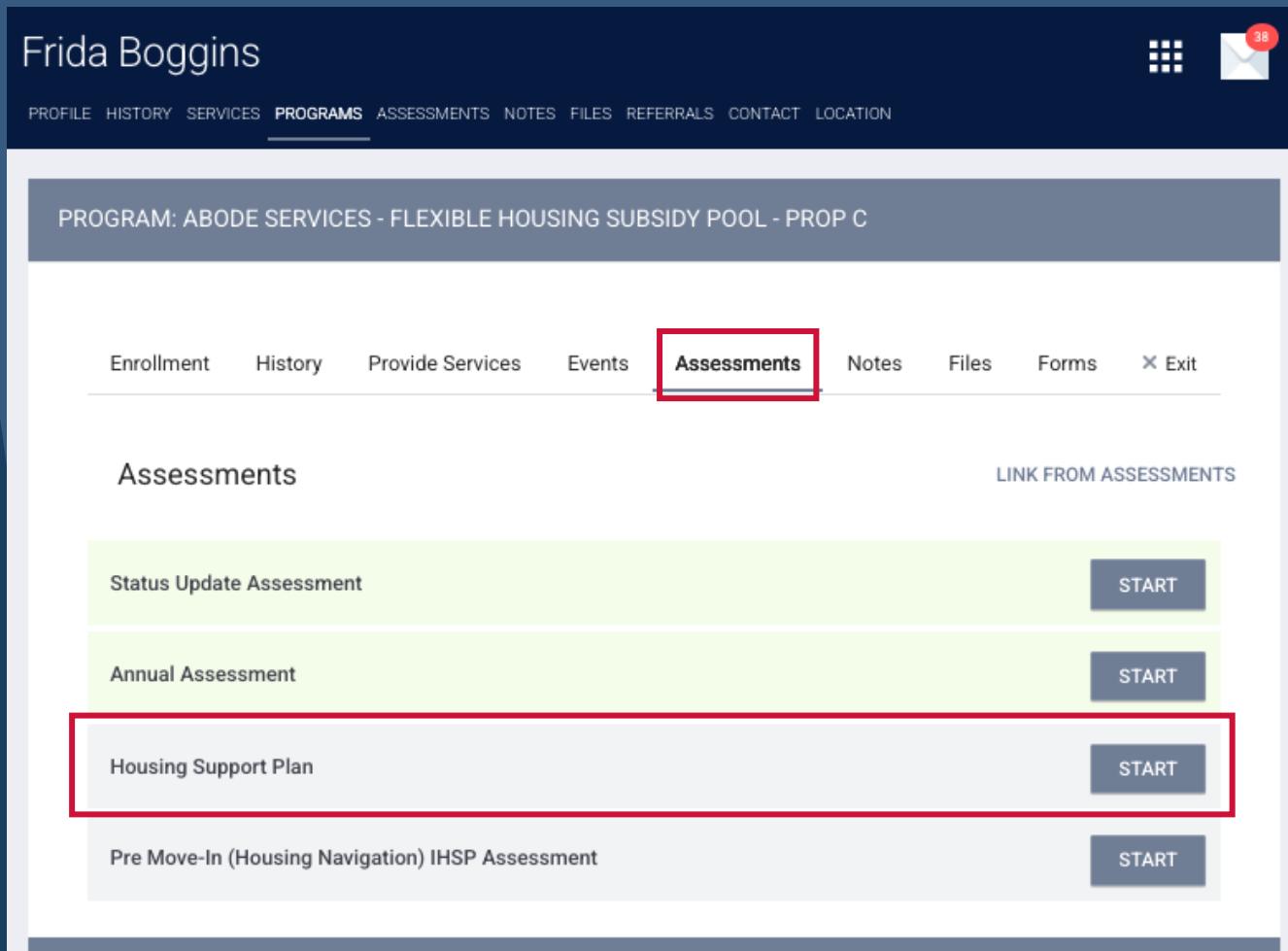
PROGRAM HISTORY

Program Name	Start Date	End Date	Type
Abode Services - Flexible Housing Subsidy Pool - ... PH - Housing with Services (no disability required for entry) TRAIN - Abode Services ⓘ	01/19/2026	Active	Individual

PROGRAMS: AVAILABLE

- Abode Problem Solving Fiscal Agent - Prop C
- Abode Services - CalWORKs - HSP
- Abode Services - Large Vehicle Rapid Rehousing - Prop C
- Abode Services - Shallow Subsidy Program - Adults - Prop C

Creating a HSP Assessment



- ...> Navigate to the Assessment tab within the program enrollment to locate the HSP
 - ...> *The HSP is only available within program enrollments, it is not available as a client level assessment*
 - ...> *The program's agency must also match your active agency for the HSP to be visible.*
- ...> Locate the **Housing Support Plan** and click Start to begin

Creating a HSP Assessment

- Please read the instructions at the top of the assessment before completing it
- Assessment broken out into 8 sections:
 - Housing Retention (*Required*)
 - Other Basic Needs
 - Income
 - Education/ Vocational Training
 - Health
 - Legal
 - Social Needs and Community Involvement
 - Other (Example: Family, Personal Interests)

HOUSING SUPPORT PLAN

⚠

- A Housing Support Plan (HSP) is required for all clients who are permanently housed in Scattered-Site or Site-Based PSH. This assessment should be completed within 30 days of move-in, when client needs change, or when goal status is updated.
- For each identified need, select relevant goals for client and describe interventions required to meet goals. This may be informed by discussions with the client or by standard workflow.
- If the client is unavailable to participate in the planning process but services are still being provided, select "Client unavailable at time of planning" and complete the Housing Support Plan.

Housing Support Plan Date 01/28/2026

HOUSING RETENTION

OUR GOAL IS TO:
Maintain safe, stable
and affordable housing

Assessed Barriers Select

Timeframe Select

Our Approach to Meeting this Goal Select

Goal Status Update Select

Next Steps

Filling out Section Details

HOUSING RETENTION

OUR GOAL IS TO:
Maintain safe, stable
and affordable housing

Assessed Barriers History of homelessness

Timeframe 0-3 months

Our Approach to Meeting this Goal Lease education and compliance, Rental payment

Goal Status Update Goal in Progress

Goal Status Comment Client is seeking help to understand the terms of the lease and remembering to pay rent on time.

Next Steps CM and client have meeting scheduled to review lease; CM will call client on 1st of the month to remind client to pay rent.

- Toggle on a Goal to show the fields within each section.
- You can select multiple responses for the “Assessed Barriers” and “Our Approach to Meeting this Goal” fields
- Enter the status of the goal under the “Goal Status Update” and update as goals are met or not met.
- Selecting “Other” within a field will create a text box for you to add any additional responses that do not already appear.
- Click “Save” at the bottom of the assessment to save your HSP

Section Details: Other: (Example: Family, Personal Interests)

- The Other: (Example: Family, Personal Interests) section can be used to enter goals that are not already included in the HSP

OTHER: (EXAMPLE: FAMILY, PERSONAL INTERESTS)

Other: (Example: Family, Personal Interests)

OUR GOAL IS TO:

Timeframe Select

Our Approach to Meeting this Goal

Goal Status Update Select

HOUSING RETENTION

OUR GOAL IS TO:
Maintain safe, stable
and affordable housing

Assessed Barriers: History of homelessness

Timeframe: 0-3 months

Our Approach to Meeting this Goal: Lease education and compliance, Rental payment

Goal Status Update: Goal in Progress

Goal Status Comment: Client is seeking help to understand the terms of the lease and remembering to pay rent on time.

HOUSING RETENTION

OUR GOAL IS TO:
Maintain safe, stable
and affordable housing

Assessed Barriers: History of homelessness

Timeframe: 0-3 months

Our Approach to Meeting this Goal: Lease education and compliance, Rental payment

Goal Status Update: Goal in Progress

Goal Status Comment: Client is seeking help to understand the terms of the lease and remembering to pay rent on time.

HOUSING RETENTION

OUR GOAL IS TO:
Maintain safe, stable
and affordable housing

Assessed Barriers: Select

Timeframe: Select

Our Approach to Meeting this Goal: Select

Goal Status Update: Select

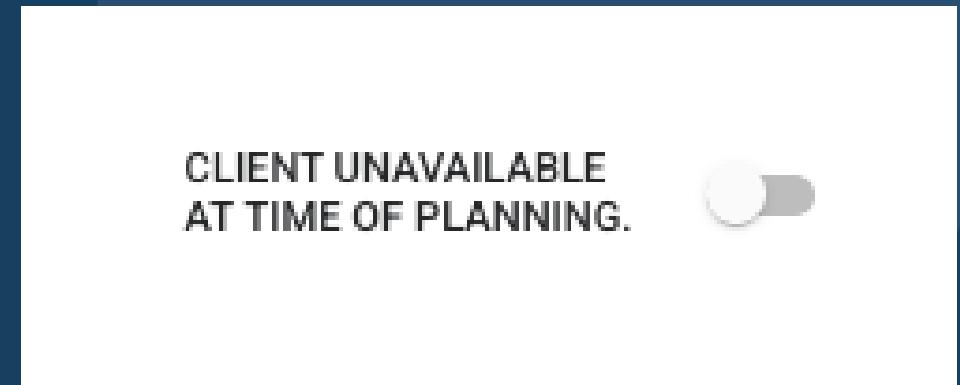
Next Steps: [Text Input Box]

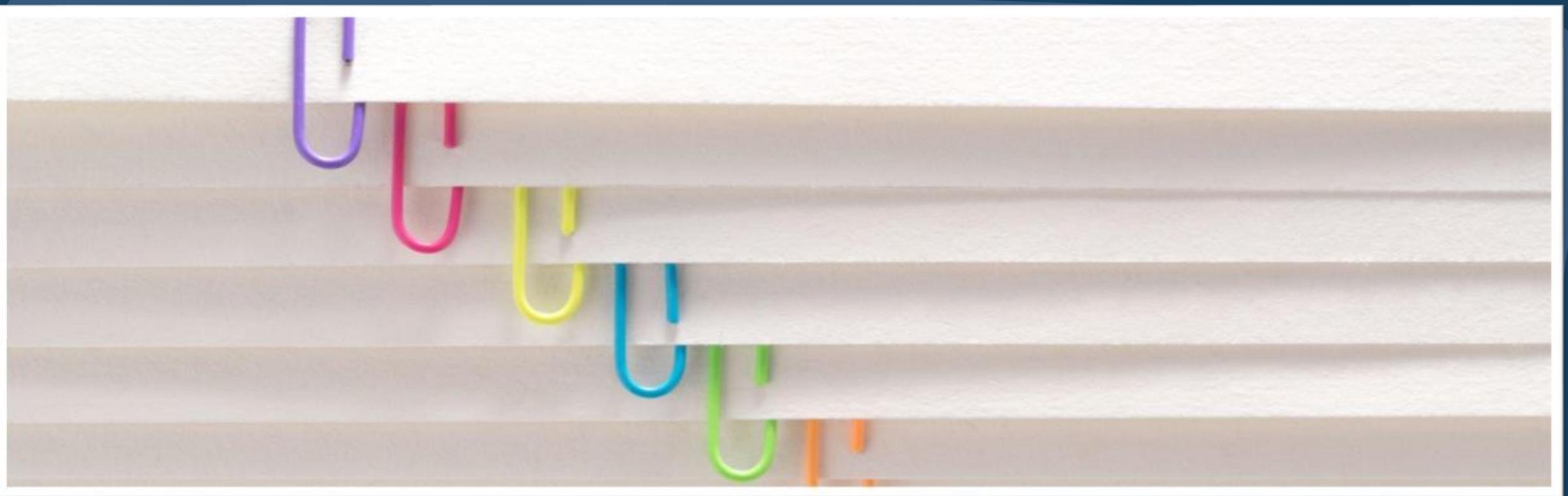
Data Cascade

- Data from previous HSP assessments may potentially cascade.
- Data cascading is when the value for a field saved on the previous assessment automatically populates on a new version of the same assessment.
 - Saved data is kept for **180 days**, if a new assessment is completed after 180+ days the previous assessment is saved, no data will automatically populate.
Data will **only cascade onto new assessments**, editing an existing assessment will not cause the data to cascade.

Toggle: “Client Unavailable at time of Planning”

- Toggle option available at the end of HSP assessment.
- To be used if a client is unavailable to collaborate on the HSP at the time of meeting.





Viewing and Editing an Existing HSP

Viewing an Existing HSP

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

PROGRAM: ABODE SERVICES - FLEXIBLE HOUSING SUBSIDY POOL - PROP C

Enrollment History Provide Services Events **Assessments** Notes Files Forms X Exit

Assessments

LINK FROM ASSESSMENTS

Status Update Assessment	START
Annual Assessment	START
Housing Support Plan	START
Pre Move-In (Housing Navigation) IHSP Assessment	START

ASSESSMENT HISTORY

Advanced search options View ▾

Assessment Name	Completed	Details
Housing Support Plan ⓘ TRAIN - Abode Services	01/28/2026	

Other Status Assessment

Can only see Assessments completed within enrollment

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

ASSESSMENTS

Job Interest Screener Pilot (Category D Only) START

ASSESSMENT HISTORY

Assessment Name	Completed	Details
Housing Support Plan ⓘ TRAIN - Abode Services	01/28/2026	

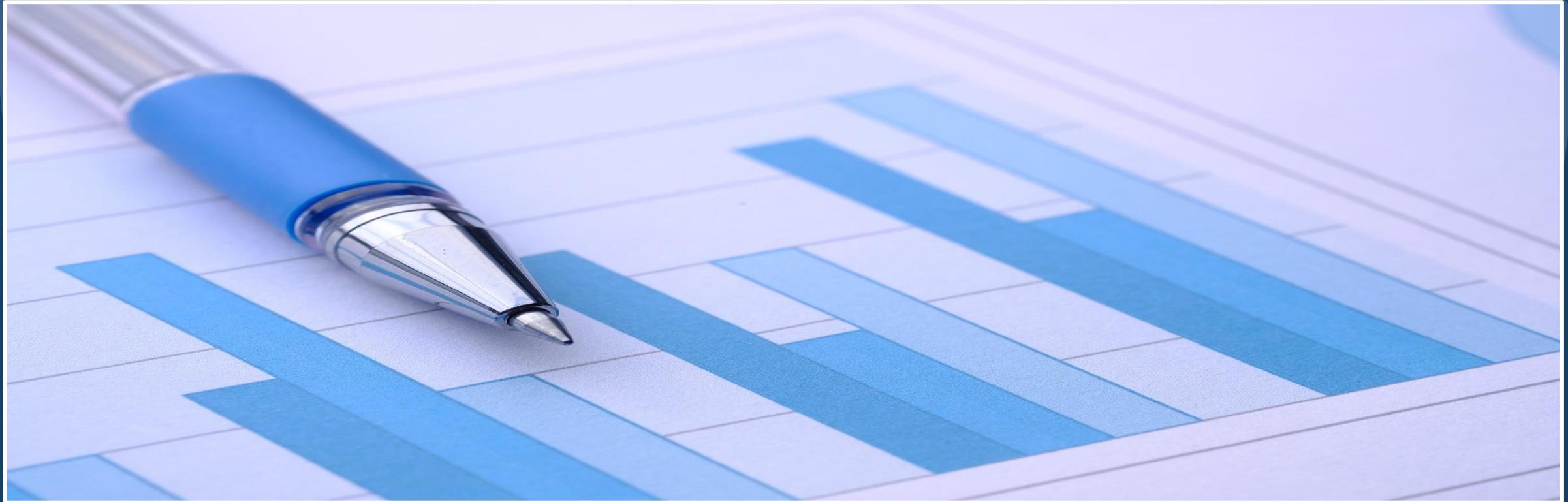
Managed with Clarity Human Services

Can see Assessments completed under any enrollment

Editing an Existing HSP

- You can only edit HSP Assessments that have been completed under your active agency and if your access role allows you to edit assessments.
 - An  icon means you can edit
 - An  icon means you can only view
- Click “Save” to save your edits
- Users are not able to delete assessments. Please reach out to Bitfocus if an assessment needs to be removed

ASSESSMENT HISTORY		
Assessment Name	Completed	Details
 Housing Support Plan  TRAIN - Abode Services	01/28/2026	



Reporting

Service Monitoring Reports

- New column, “Housing Support Plan Date” added to both SMR reports
 - Services Monitoring Report for Site-Based PSH
 - Services Monitoring Report for Scattered Site Housing
- Both reports located in the Data Analysis tab

The screenshot shows the Data Analysis tab of a software interface. At the top, there are three tabs: REPORT LIBRARY, EXPLORE, and DATA ANALYSIS, with the DATA ANALYSIS tab selected. Below the tabs is a search bar with various filters: Agency Name (is Adobe Services), Program Name (is any value), Unique Identifier (is any value), Enrollment Start Date (is any time), Service Name (is any value), CalAIM Service Category (is Housing Tenancy and Sustaining Services), Service Date (is previous month), and More (More + 2).

The first report, "Clients Without Any Services Ever", displays a table with columns: Agency Name, Program Name, Link to ONE Profile, Unique Identifier, Enrollment Start Date, Housing Move-in Date, Housing Support Plan Date, and # of Services Ever. The table shows four clients from Adobe Services, all associated with City Gardens programs. The "Housing Support Plan Date" column is highlighted with a red box.

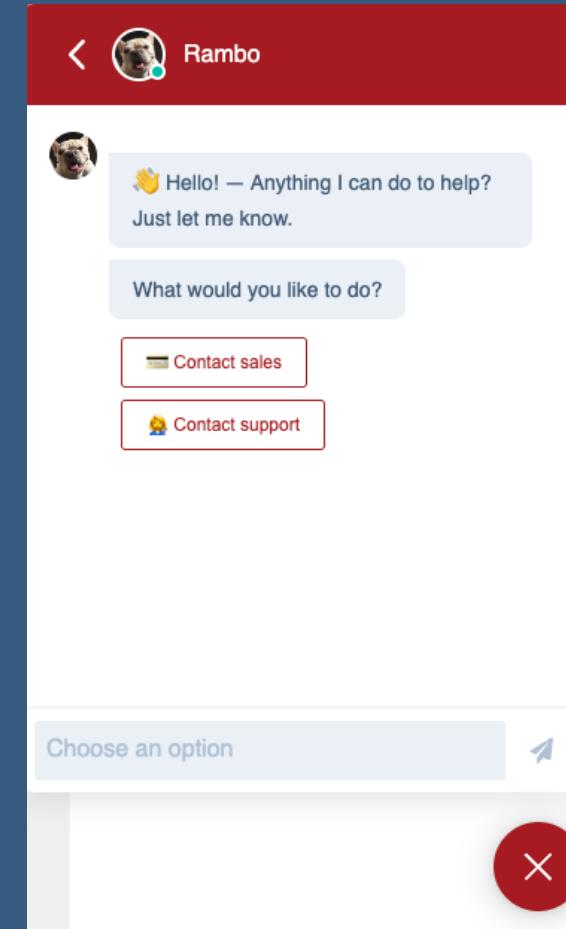
The second report, "Count of Services by Client Over the Last 3 Months", displays a table with columns: Agency Name, Program Name, Link to ONE Profile, Unique Identifier, Enrollment Start Date, Housing Move-in Date, Housing Support Plan Date, # of Services This Month, # of Services Last Month, and # of Services 2 Months Ago. The table shows 13 clients from Adobe Services, all associated with City Gardens programs. The "Housing Support Plan Date" column is highlighted with a red box.

Bitfocus Resources

ONE System Help Site:
→ onesf.bitfocus.com

Bitfocus Help Desk
→ onesf@bitfocus.com
→ 415.429.4211

Help Desk Widget (On ONEF Help Center Website and Bitfocus Help Site)



When should I go to the Help Desk?

Example scenarios:

- I accidentally added an extra HSP and I need it to be deleted!
- I am not able to edit an HSP I created! **Help!**
- **Oopsie!** I wrote an HSP for the wrong client!

And much more! Feel free to reach out to the Help Desk with any situation that is difficult to resolve on your own!

Questions?

