



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



DEPARTMENT OF
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SUPPORTIVE HOUSING

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

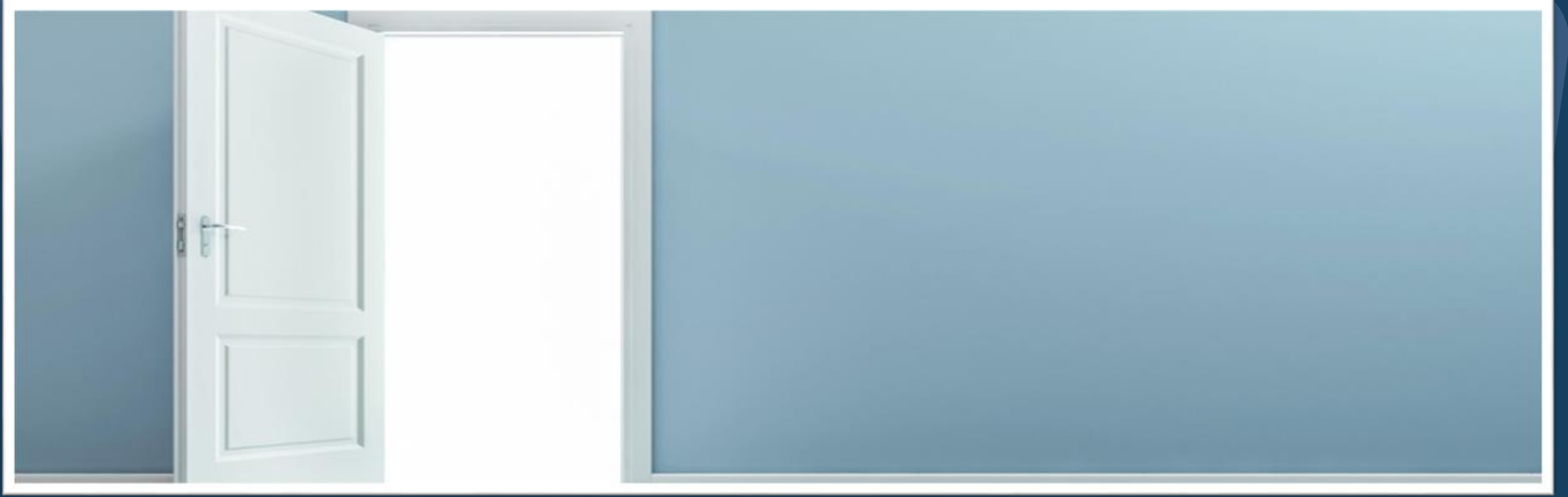
- Direct conversations with the client
- Provider's Internal Care Plans
- Provider-to- provider collaboration
- Standard program workflow and best practices
- Observations or indicators suggesting case management is necessary

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

The screenshot shows the client profile for Frida Boggins. The top navigation bar includes tabs for PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted with a red box), ASSESSMENTS, NOTES, FILES, REFERRALS, CONTACT, and LOCATION. Below the navigation bar, the 'PROGRAM HISTORY' section displays a table with the following data:

	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

Below the 'PROGRAM HISTORY' section, the 'PROGRAMS: AVAILABLE' section lists four programs, each with a dropdown arrow:

- 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


The screenshot shows the Bitfocus user interface for a user named Frida Boggins. The top navigation bar includes links for PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, REFERRALS, CONTACT, and LOCATION. The 'PROGRAMS' tab is selected, and the program name 'ABODE SERVICES - FLEXIBLE HOUSING SUBSIDY POOL - PROP C' is displayed. Below the program name, there is a sub-navigation bar with tabs for Enrollment, History, Provide Services, Events, Assessments, Notes, Files, Forms, and an Exit button. The 'Assessments' tab is highlighted with a red box. Under the 'Assessments' tab, there is a list of assessment types: Status Update Assessment, Annual Assessment, Housing Support Plan, and Pre Move-In (Housing Navigation) IHSP Assessment. Each assessment type has a 'START' button next to it. The 'Housing Support Plan' row is highlighted with a red box. A link labeled 'LINK FROM ASSESSMENTS' is visible on the right side of the assessment list.

- 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	<div>Client is seeking help to understand the terms of the lease and remembering to pay rent on time.</div>	
Next Steps	<div>CM and client have meeting scheduled to review lease; CM will call client on 1st of the month to remind client to pay rent.</div>	

- 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 ▼

Our Approach to Meeting this Goal

Goal Status Update ▼

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.

HOUSING RETENTION

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

Assessed Barriers

Timeframe

Our Approach to
Meeting this Goal

Goal Status Update

Goal Status Comment

HOUSING RETENTION

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

Assessed Barriers

Timeframe

Our Approach to
Meeting this Goal

Goal Status Update

Goal Status Comment

New assessment
created within
180 days

HOUSING RETENTION

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

Assessed Barriers

Timeframe

Our Approach to
Meeting this Goal

Goal Status Update

Next Steps

New assessment
created after 180
days

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.

CLIENT UNAVAILABLE
AT TIME OF PLANNING.





Viewing and Editing an Existing HSP

Viewing an Existing HSP

Frida Boggins

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

Frida Boggins

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	

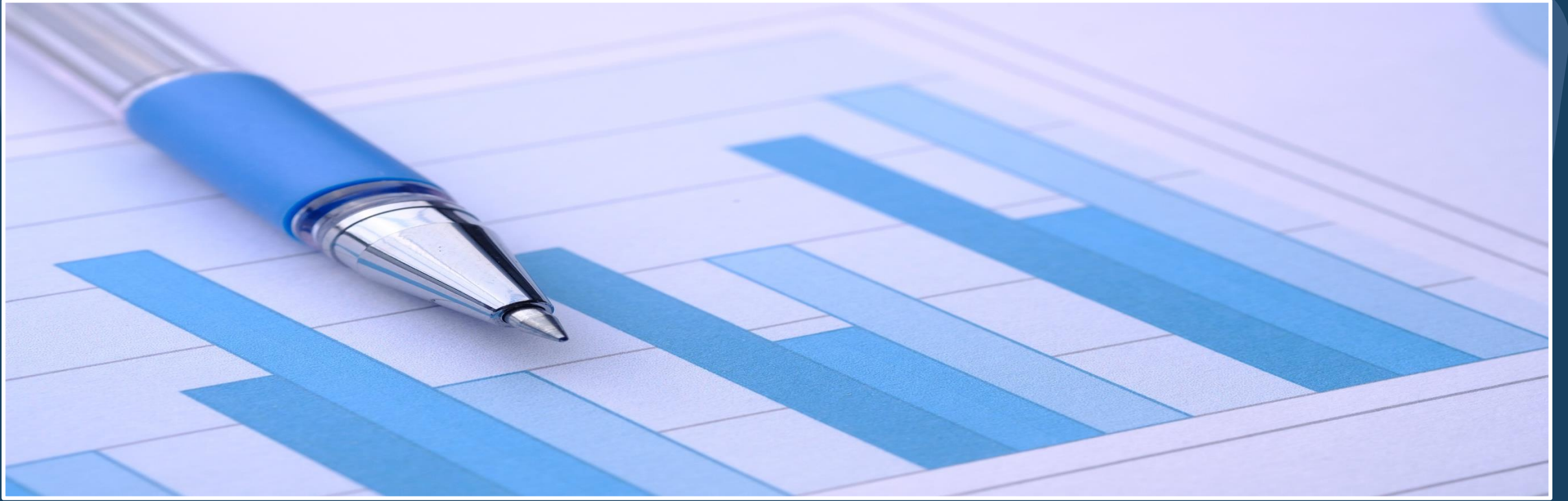
Managed with Clarity Human Services

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

REPORT LIBRARY EXPLORE **DATA ANALYSIS**

Services Monitoring Report for Site-Based PSH

Agency Name * Program Name Unique Identifier Enrollment Start Date Service Name CalAIM Service Category Service Date (only filters 3rd tile)

Clients Without Any Services Ever

These clients won't appear in other sections of the dashboard.

Agency Name	Program Name	Link to ONE Profile	Unique Identifier	Enrollment Start Date	Housing Move-in Date	Housing Support Plan Date	# of Services Ever
1 Abode Services	City Gardens - Prop C	84313 View	248B031F3	2025-12-05	2025-12-05		0
2 Abode Services	City Gardens - HUD PBV	75336 View	63B0F32AF	2025-12-04	2025-12-04		0
3 Abode Services	City Gardens - Prop C	2877 View	A98B4C0C2	2025-10-30	2025-10-30		0
4 Abode Services	City Gardens - HUD PBV	95171 View	FD55357E8	2025-06-11	2025-06-11		0

Count of Services by Client Over the Last 3 Months

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	# of Services 2 Months Ago
1 Abode Services	City Gardens - HUD PBV	121367 View	07F05F347	2025-10-21	2025-10-21		0	1	0
2 Abode Services	City Gardens - Prop C	92229 View	433C7CA43	2025-09-04	2025-09-04		2	1	0
3 Abode Services	City Gardens - Prop C	19359 View	50C8B4656	2025-08-15	2025-08-15		0	4	4
4 Abode Services	City Gardens - Prop C	4148 View	FFED1871	2025-07-10	2025-07-10		0	2	1
5 Abode Services	City Gardens - Prop C	27751 View	86A0BF223	2025-07-07	2025-07-07		0	0	2
6 Abode Services	City Gardens - Prop C	94124 View	FF64A5BD3	2025-05-30	2025-05-30		0	4	1
7 Abode Services	City Gardens - Prop C	121290 View	72A33E54C	2025-05-22	2025-05-22		0	1	1
8 Abode Services	City Gardens - Prop C	81895 View	4B35B94AA	2025-05-21	2025-05-21		0	1	1
9 Abode Services	City Gardens - Prop C	7224 View	26F1FB94F	2025-05-21	2025-05-21		0	0	2
10 Abode Services	City Gardens - HUD PBV	110398 View	C97D01141	2025-04-03	2025-04-03		0	6	5
11 Abode Services	City Gardens - Prop C	28115 View	AAB24E9F9	2025-04-01	2025-04-01		0	2	0
12 Abode Services	City Gardens - HUD PBV	35172 View	A488D484C	2025-03-20	2025-03-20		0	1	2

Bitfocus Resources

ONE System Help Site:

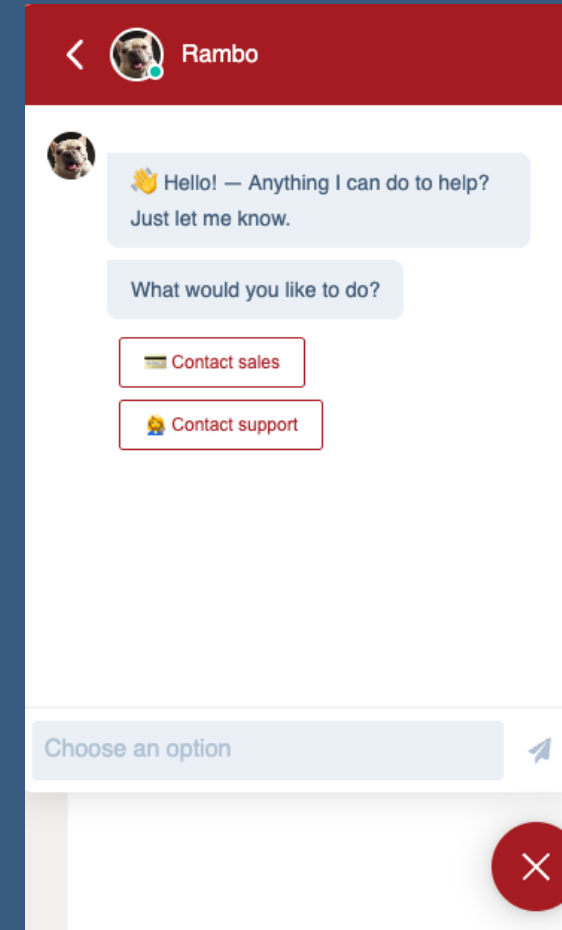
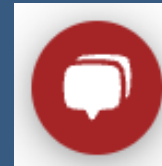
--->onesf.bitfocus.com

Bitfocus Help Desk

--->onesf@bitfocus.com

--->415.429.4211

Help Desk Widget (On ONESF 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?

