Jan 2026

Glide Relocation & Reunification Program Training

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Today's Agenda

- Welcome & Introductions
- Creating a profile in ONE
- Release of Information
- Managing Households
- Enrollments
- Events/Services
- Uploading Files
- Exits
- Reporting
- Resources/Questions & Wrap up

Client Profiles

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Creating New Profiles in the ONE system

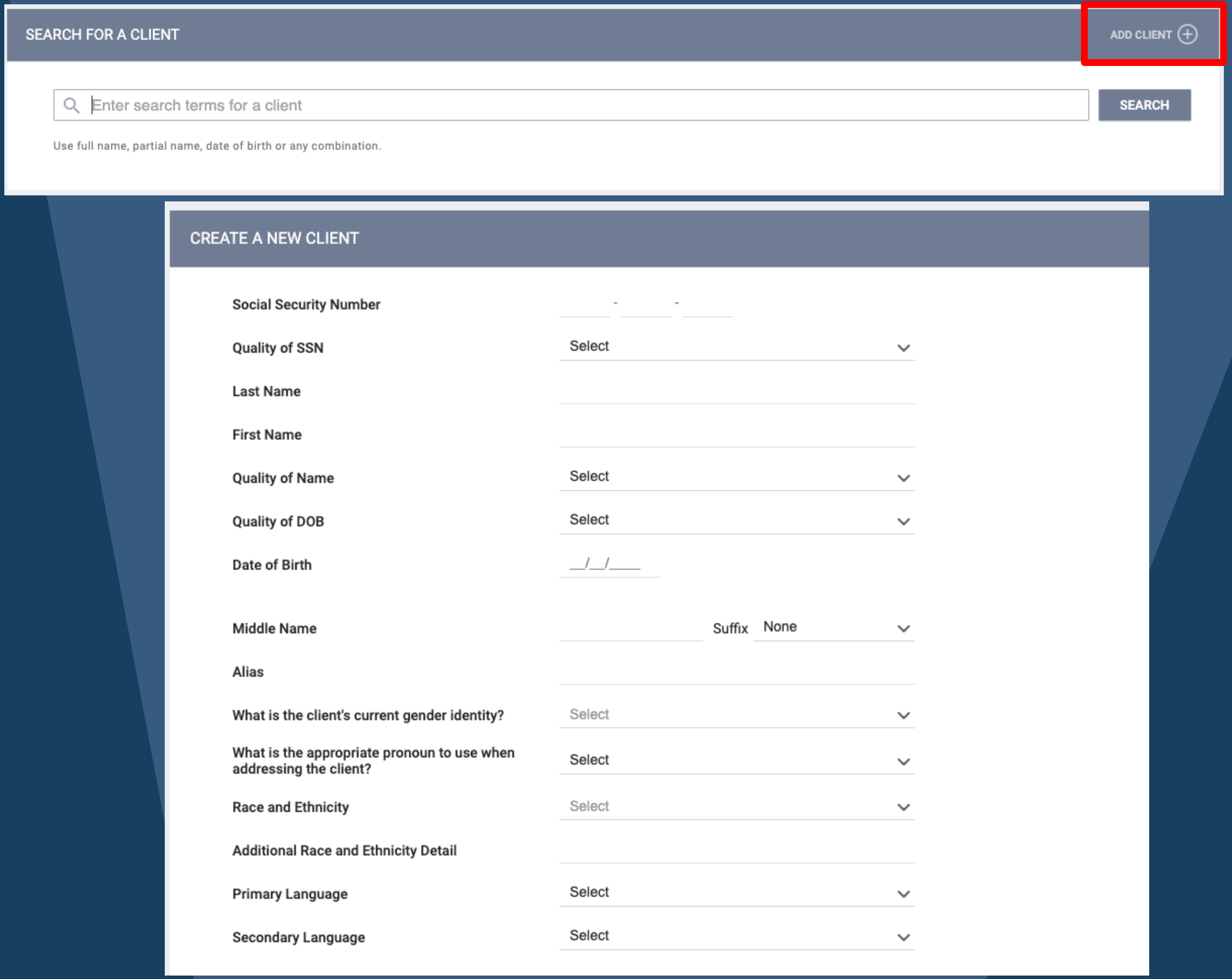
Search the client within the ONE system to be sure that a profile for your agency doesn't already exist

- Search for household/ head of household
- Search by name, DOB and SSN

If no profile exists, create a new profile by clicking the Add Client button

Complete the fields that the client feels comfortable sharing..

- If a client chooses not to answer a specific question, use **"Client prefers not to answer"**
- If the client does not know the answer, use **"Client doesn't know"**
- **"Data not collected"** should only be used in the case that question was not asked



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Release of Information (ROI)

Homeless Response System Release of Information

- Explains how client information is collected in the ONE System, as well as how that info is used by or shared to housing and service providers
- Must be signed by the client and uploaded into the ONE system
- If a client refuses to provide consent, a ONE system profile may not be created
- Online ROI Resources and Forms (available in English, Chinese, Spanish, Tagalog)

San Francisco Department of Homelessness & Supportive Housing

Homelessness Response System
Authorization for Use or Disclosure of Information

This form and the attached notice describe how personal information about you may be used and shared by the City and County of San Francisco's Department of Homelessness and Supportive Housing (HSH) and its provider organizations, and the rights you have about your information.

The San Francisco Department of Homelessness and Supportive Housing's (HSH) Online Navigation and Entry (ONE) System (the City's Homeless Management Information System) is a database that allows HSH to save, access, and share client level information with our Partner agencies, which are San Francisco City Departments, including the Department of Public Health and the Human Services Agency, and other community-based housing and service providers who work with people experiencing, or at risk of experiencing, homelessness. Examples include the SF Homeless Outreach Team (SFHOT) or service providers in supportive housing.

To be able to best help you, information is collected in the ONE System and used by or shared with Partner agencies. Partner agencies use the information in the ONE System to:

- Match clients to appropriate housing and other services they might be able to receive
- Improve coordination of your care and related services between City agencies and providers; and

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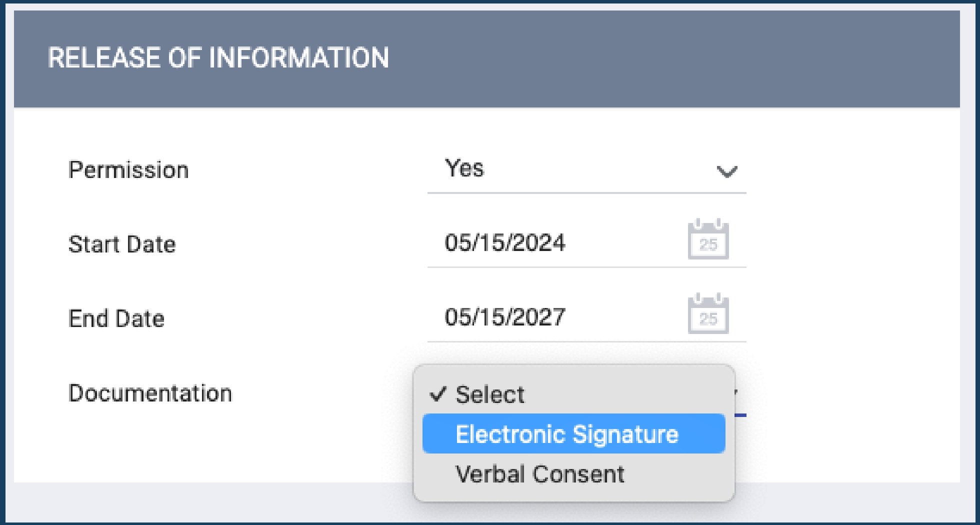
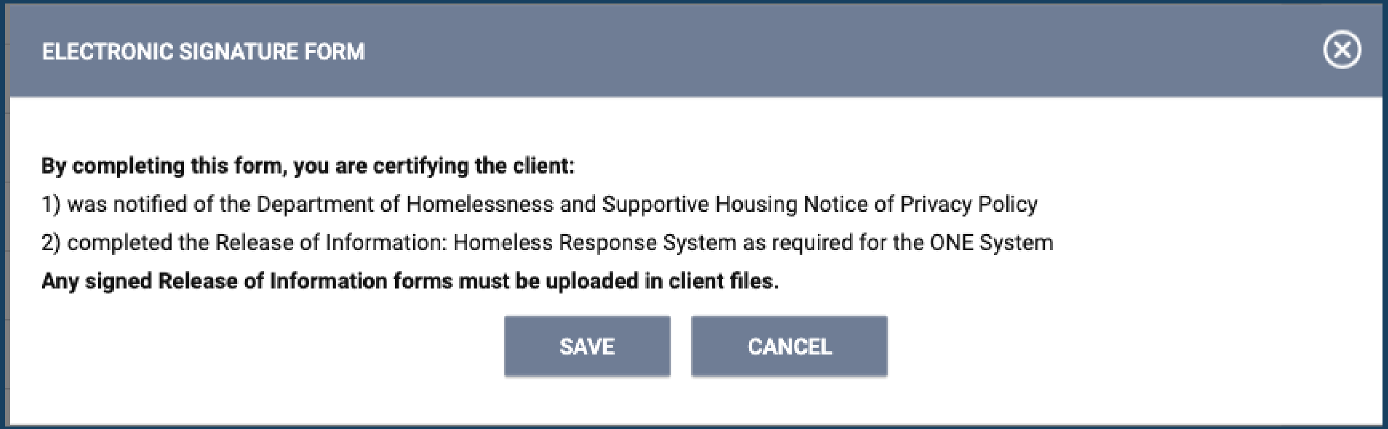
Release of Information in ONE

When creating a new profile, ONE will prompt you to have the household sign a Release of Information

- Electronic Signature (preferable method)
- Verbal Consent only to be used if physical signature couldn't be obtained due to working remotely with clients





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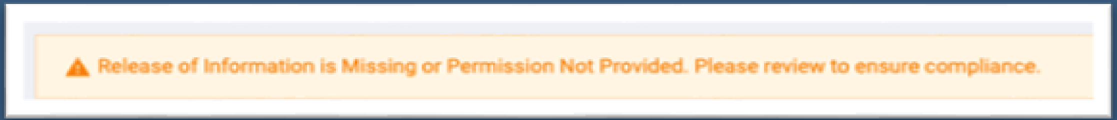
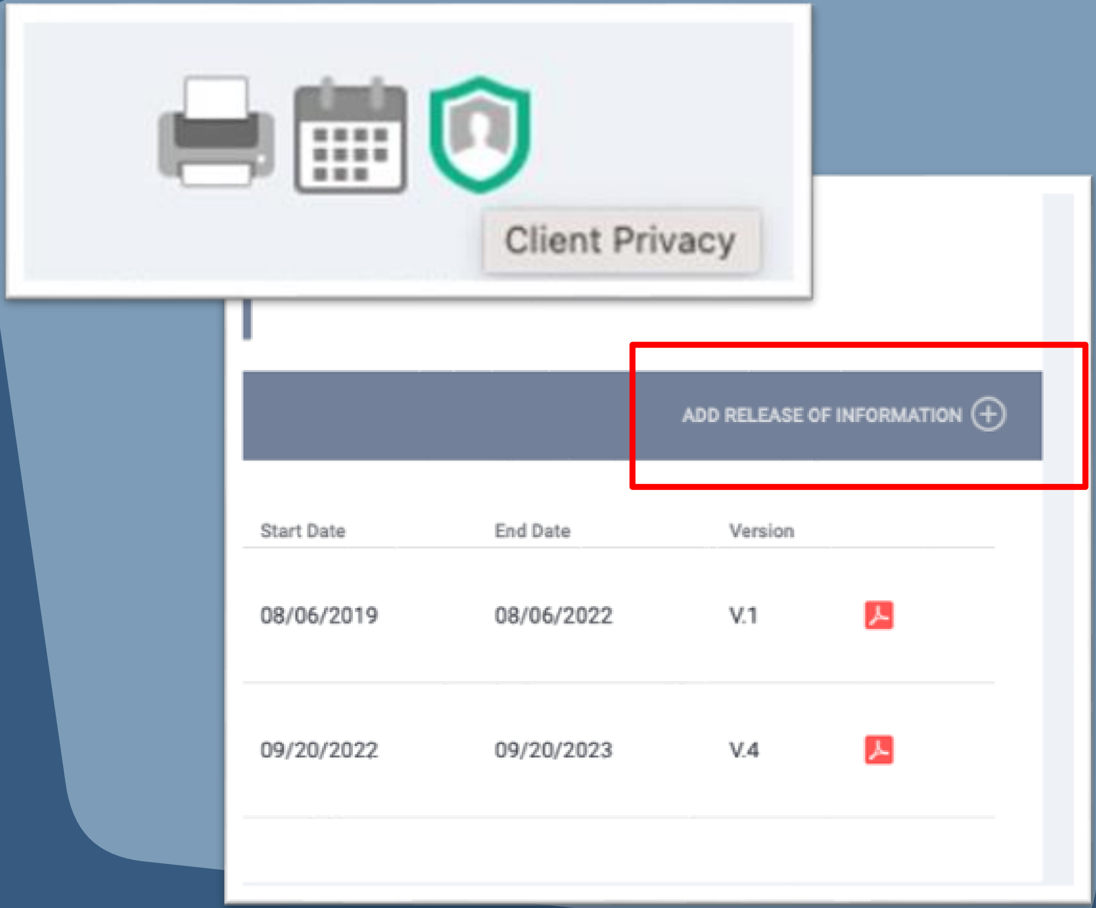
Release of Information in ONE

- ONE will prompt for a Release of Information to be completed when a client profile is created and must be updated every 3 years
- Profiles with missing or expired Releases of Information will be flagged with a yellow banner



- To maintain compliance, each client profile must have an up-to-date & active ROI recorded both as:
    - A file uploaded into client profile
    - An electronic signature recorded in Client Privacy section of client profile (shield icon)



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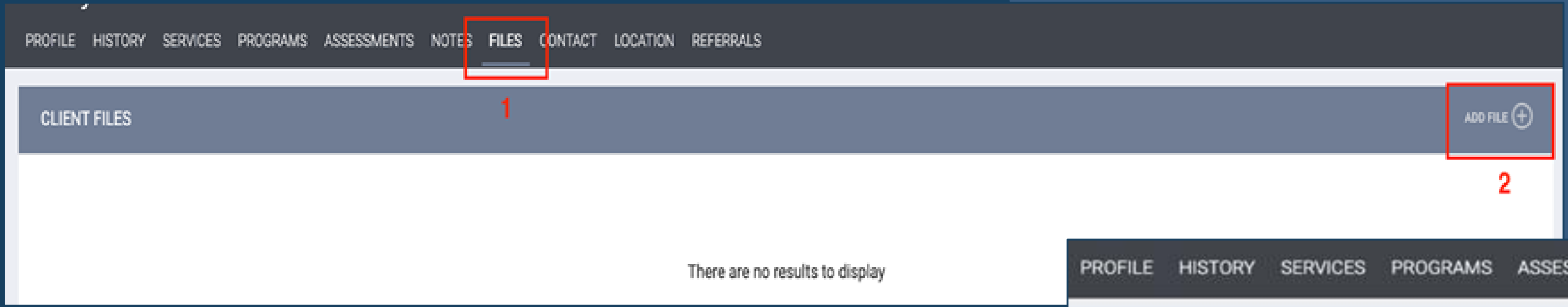
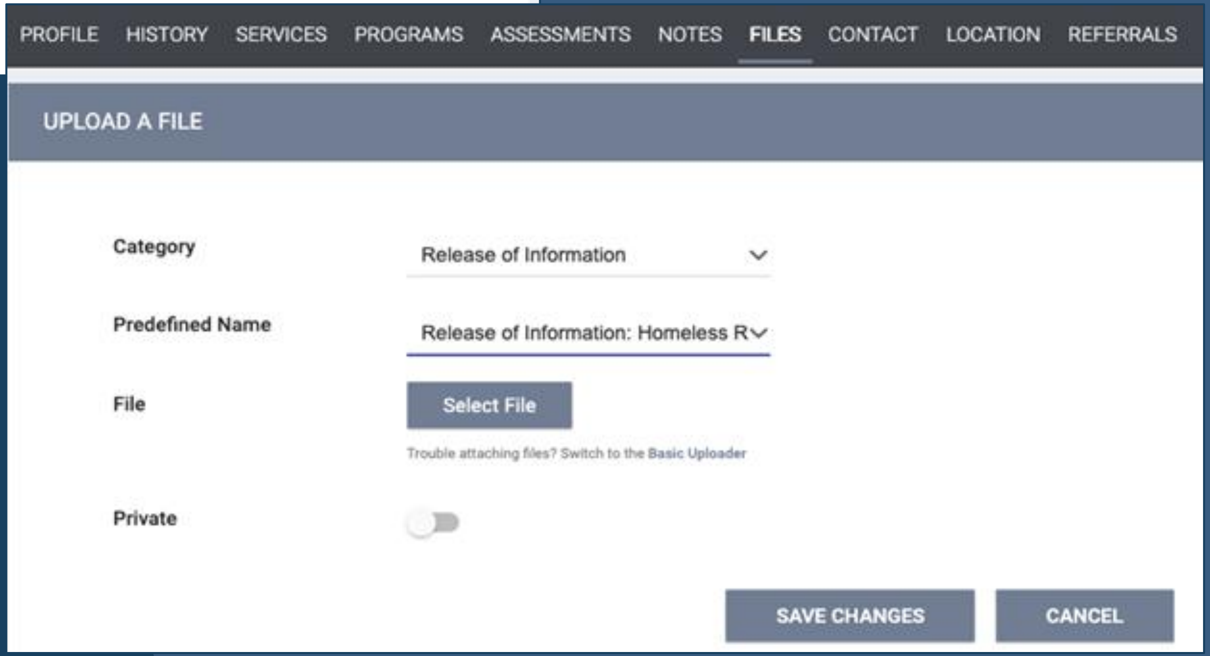
Uploading an ROI as a File in ONE





To upload an ROI:

1. Select the Files tab
2. Select the category for Release of Information
   - Homeless Response System
3. Select your file from your computer using the Select File button
4. Click Save Changes

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Managing Households

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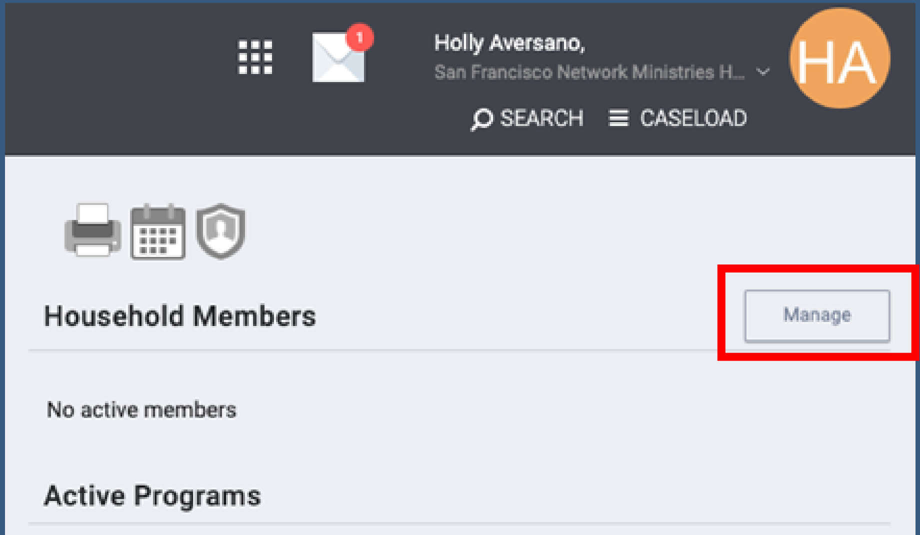
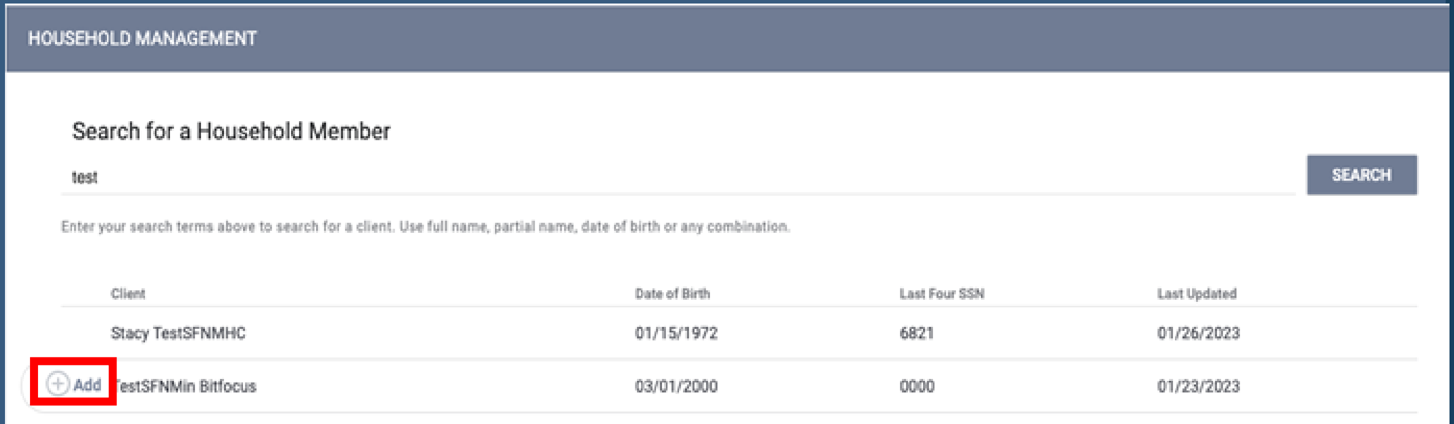
Managing Households in ONE: Client Profile

- You can add and remove household members on the client profile
- Is a necessary step when enrolling households of 2 or more people into a program
- Be sure to indicate a Head of Household
  - Member Type should always reflect the relationship to the Head of Household





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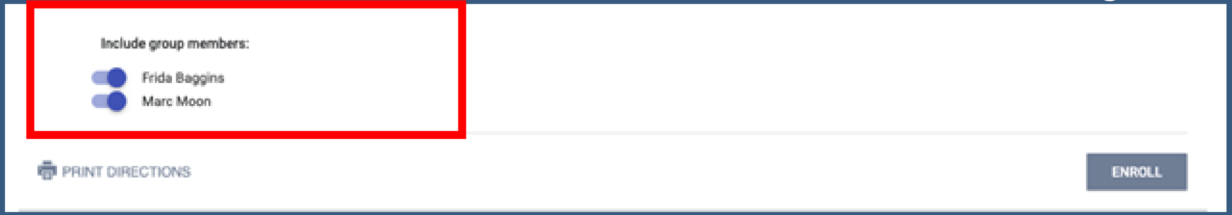
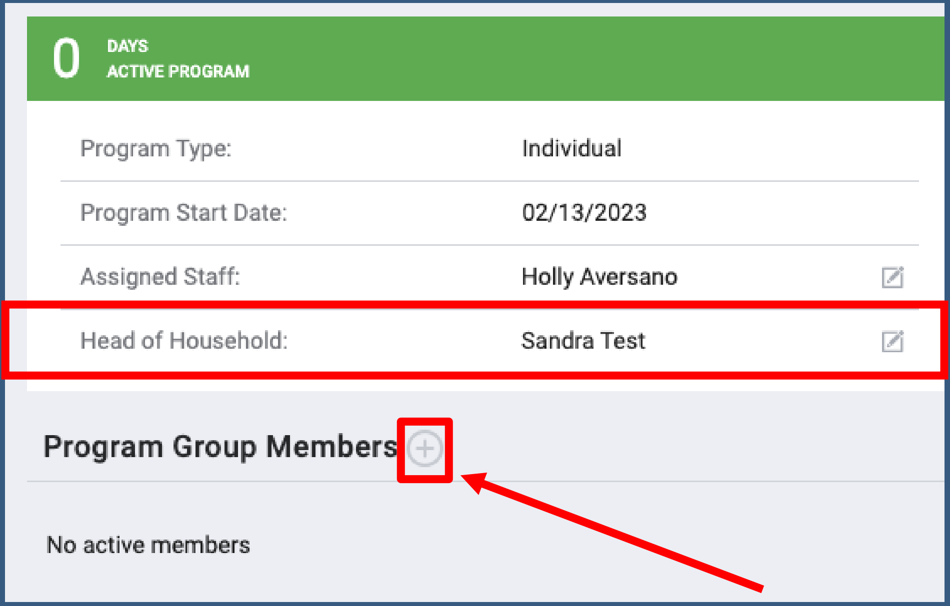
Managing Households in ONE: Client Enrollment

- You can add and remove household members while enrolling a client into a program:



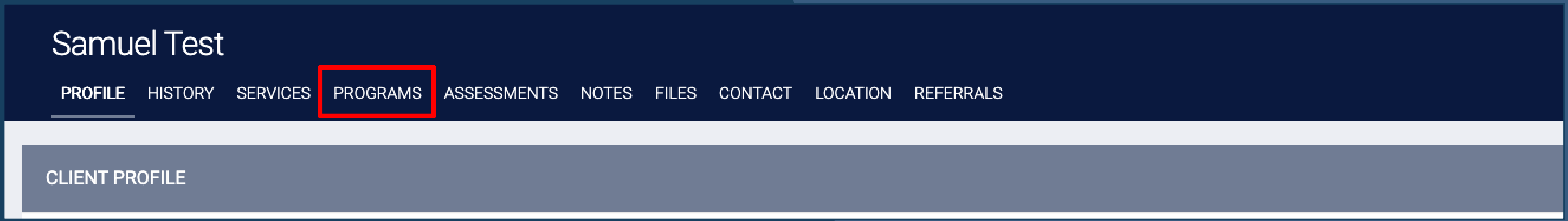
- Or within an active program enrollment:



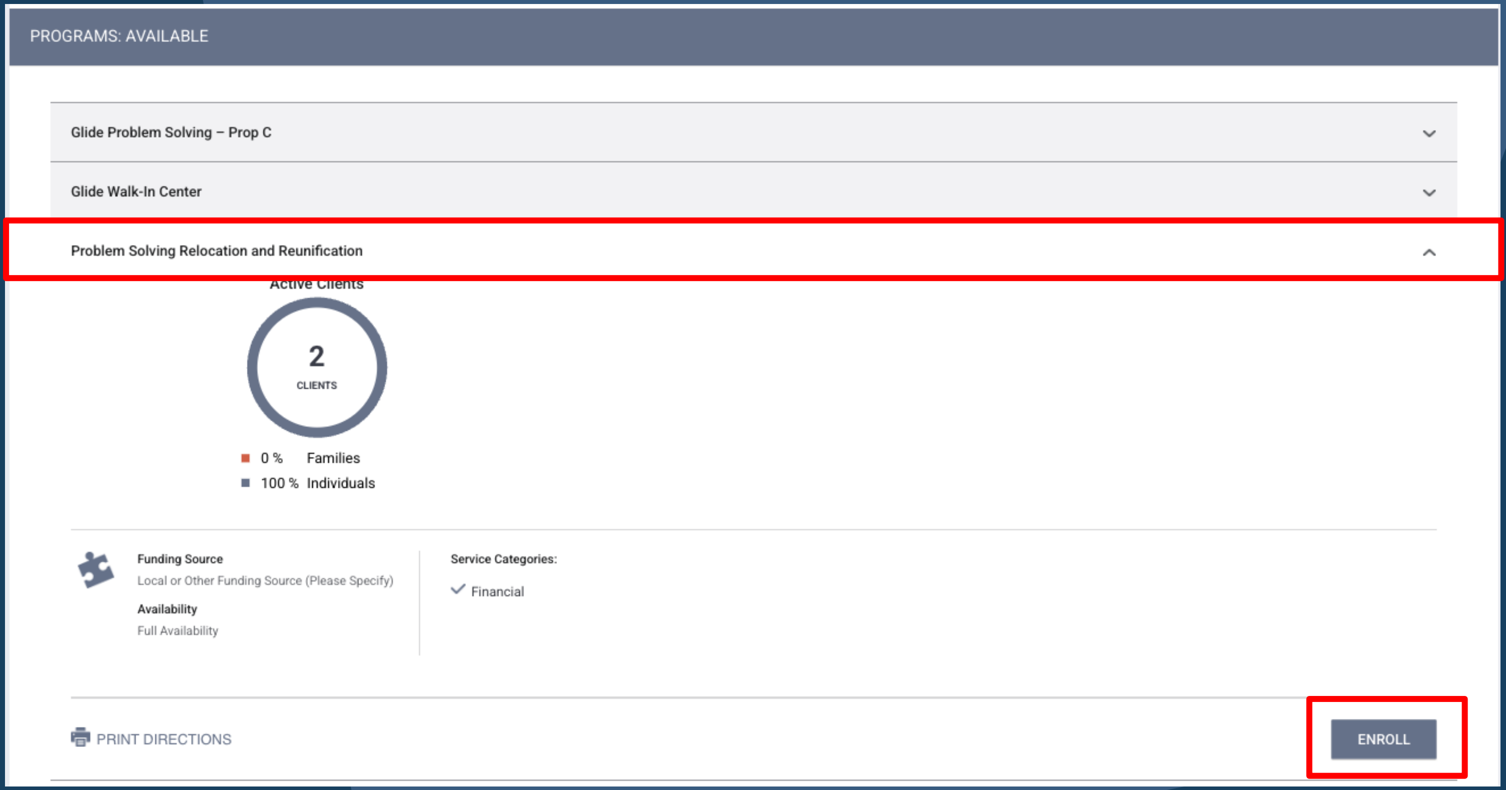
**Household members must be added as members at the client profile first before appearing as available members to add to an enrollment*

Program Enrollments

Program Enrollments



- You can enroll them into a program by completing the following:
  1. Be sure you are switched to the appropriate agency for the program you wish to enroll into
  2. Go to the client profile
  3. Click on the PROGRAMS tab
  4. Scroll down to the Programs: Available section
  5. Click on program name
  6. Include group members (if applicable)
  7. Click Enroll



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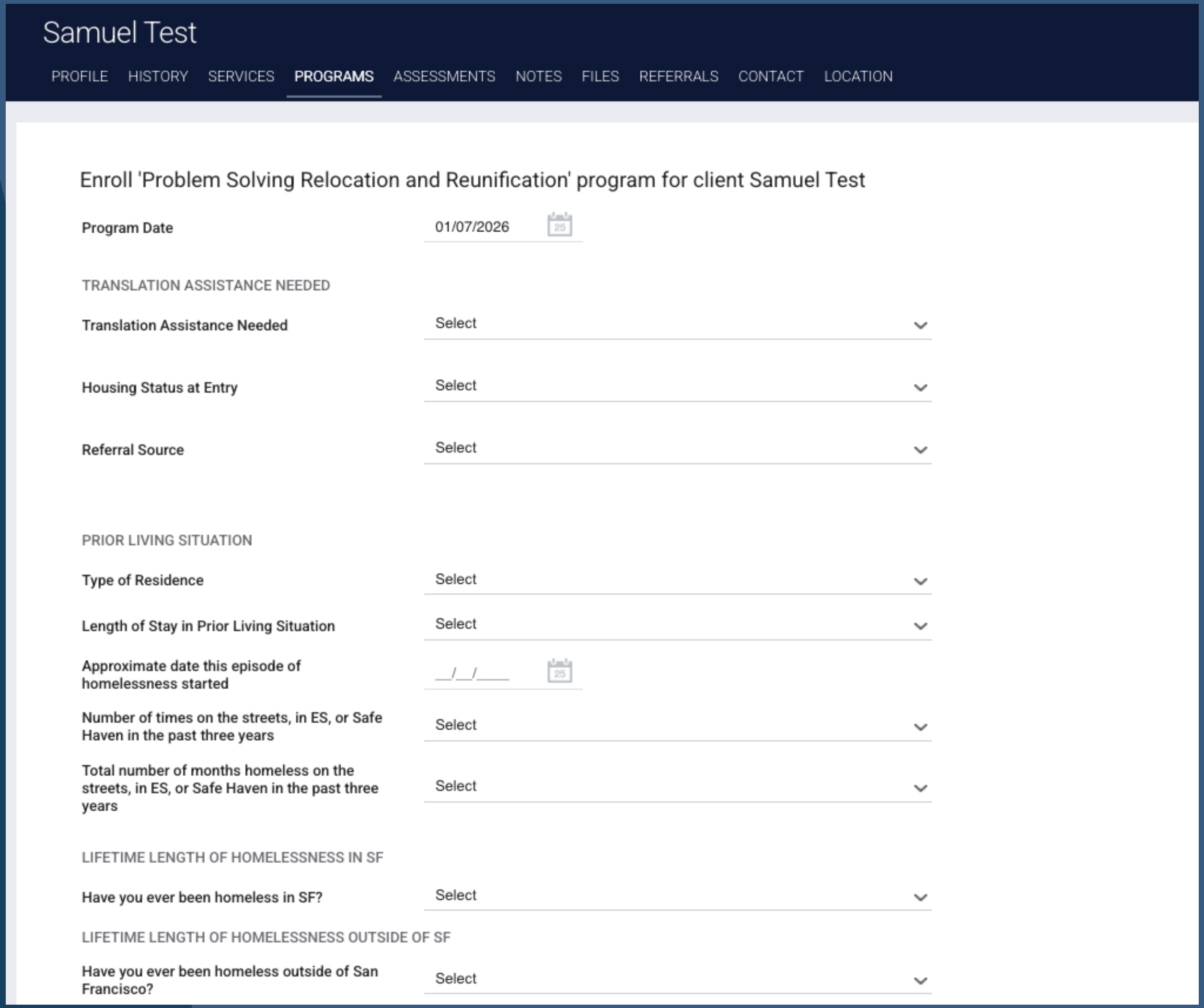
Program Enrollments: Enrollment Form



- Project Start Date is the date that client enrolled into the program
- Be sure to…
  - Ask all questions and fill in answers as completely as the client is comfortable answering

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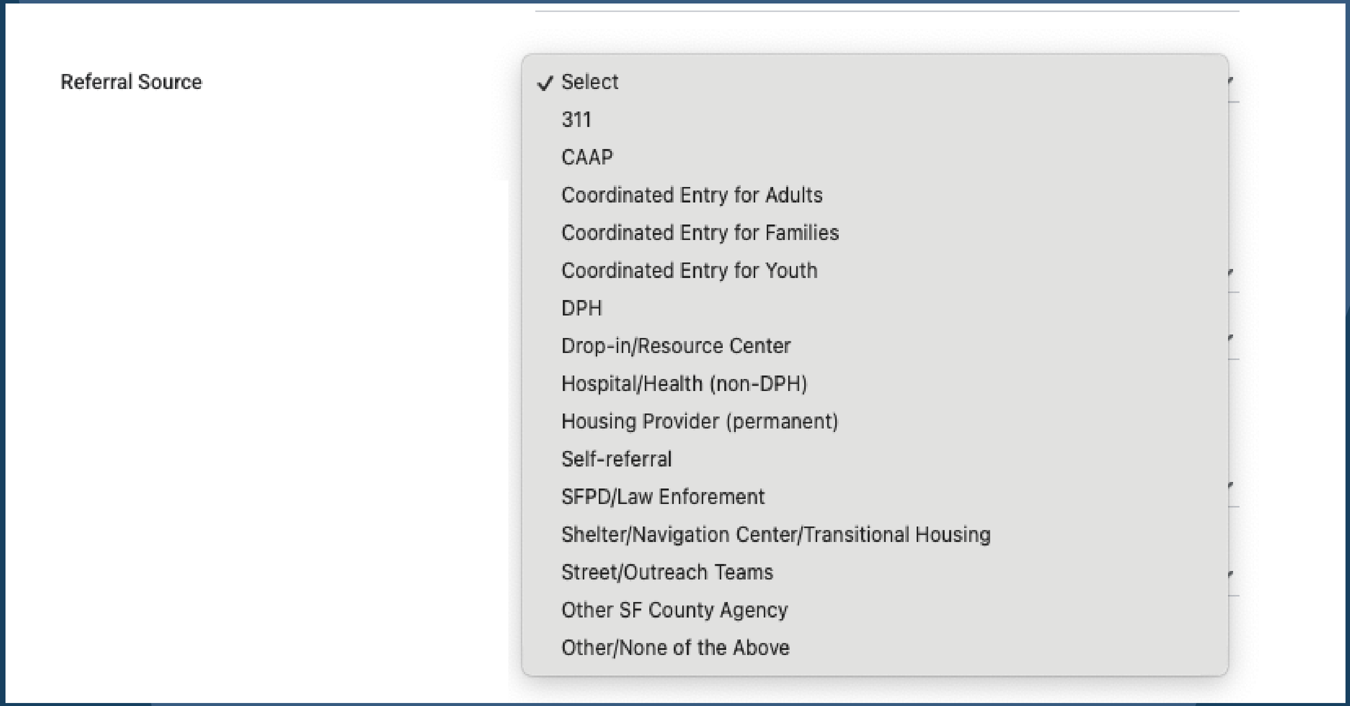
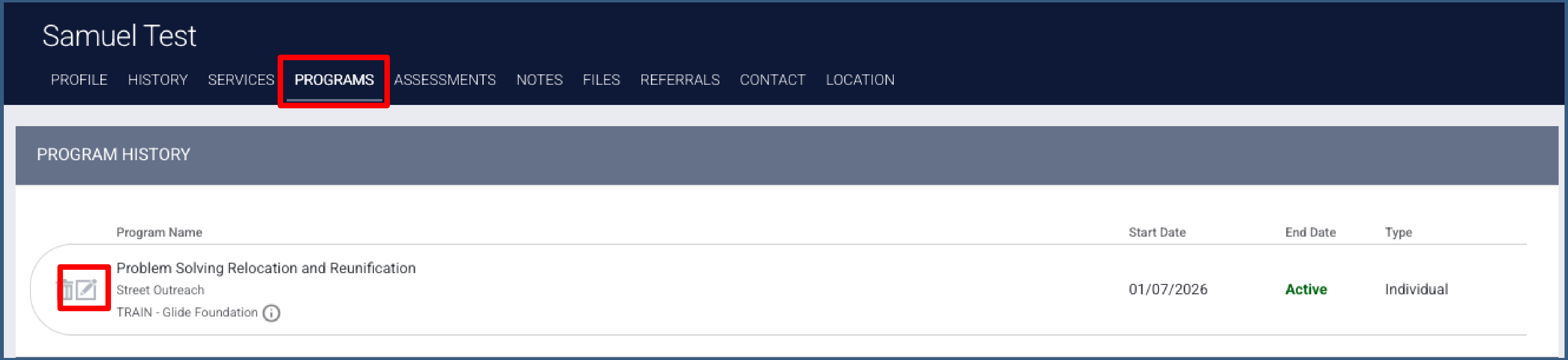
Program Enrollments: Referral Source

- Appears on enrollment screen
- Includes ‘Other’ options if household referral source does not appear on list.
- Additional questions may appear depending on selection.



Accessing a program enrollment

- After a client has been enrolled…
  - Program enrollments are accessible in the Program Tab of the client profile. You can click the pencil icon next to the enrollment you wish to view.



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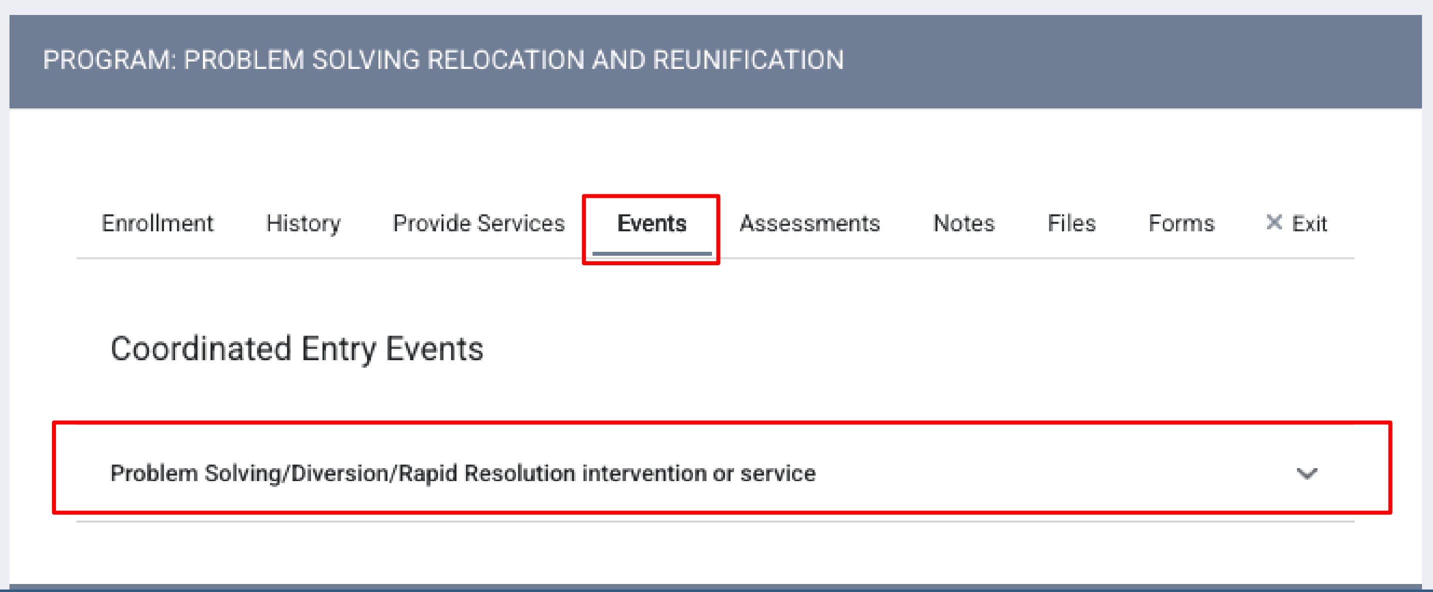
Events and Services

Events

- Problem Solving Conversation
  - All Relocation Assistance clients should receive a PS Conversation Event.
  - For clients on parole or probation, be sure to record whether the client is cleared to travel as a note under the PS Conversation Event.
- Problem Solving Travel and Relocation Support: Referral to substance use treatment or sobering center
  - Event Note should indicate which substance use treatment or sobering center the client will be referred to.



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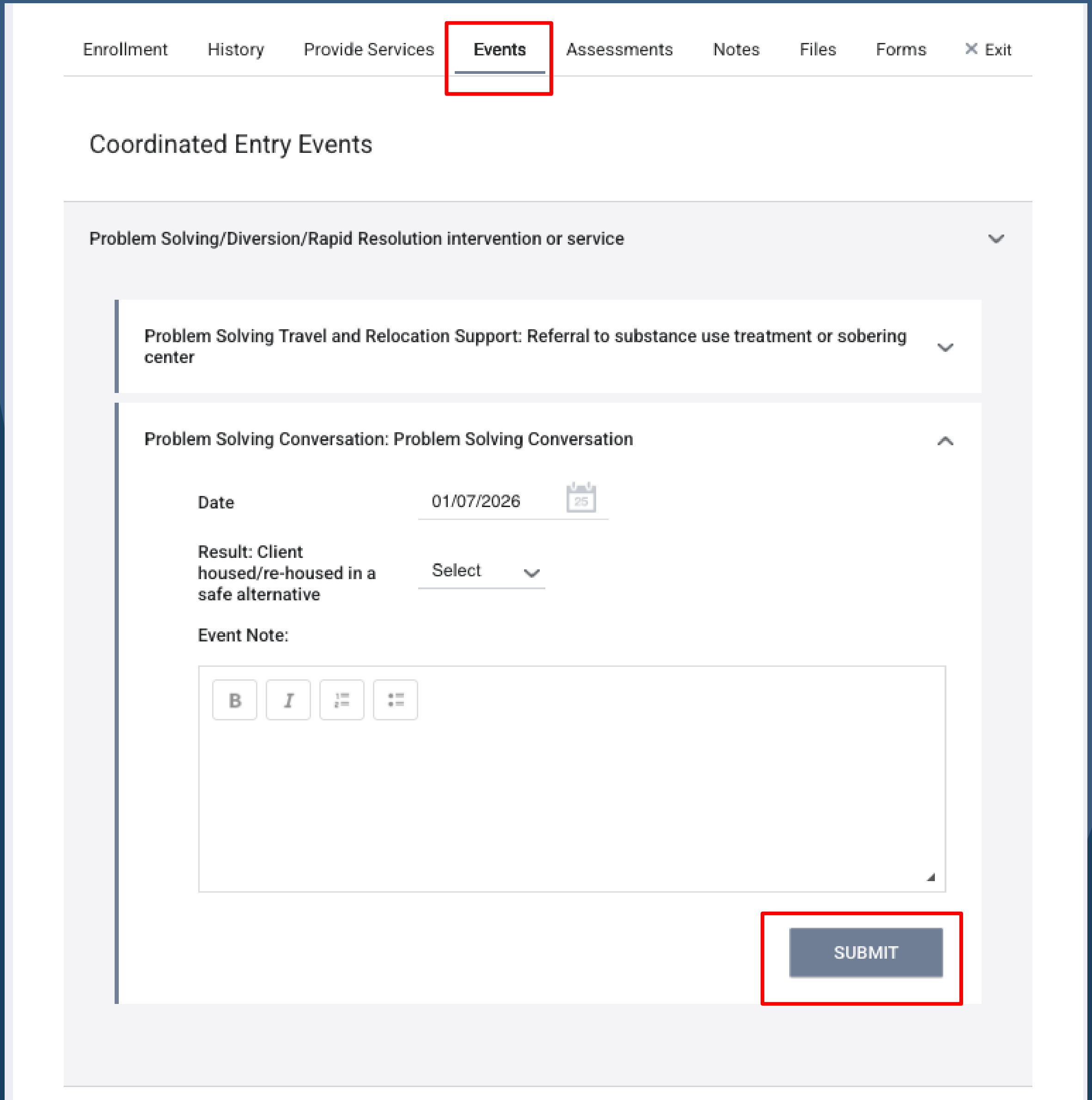
How to Submit an Event

While within a program enrollment

1. Click on Events Tab
2. Click on Event Category
3. Click on the appropriate Event item
4. Adjust for appropriate date and write note
5. Record whether the client is housed/rehoused in a safe alternative due to conversation
6. Include group members, if appropriate
7. Click Submit
8. Find Submitted Event in the Events tab under History



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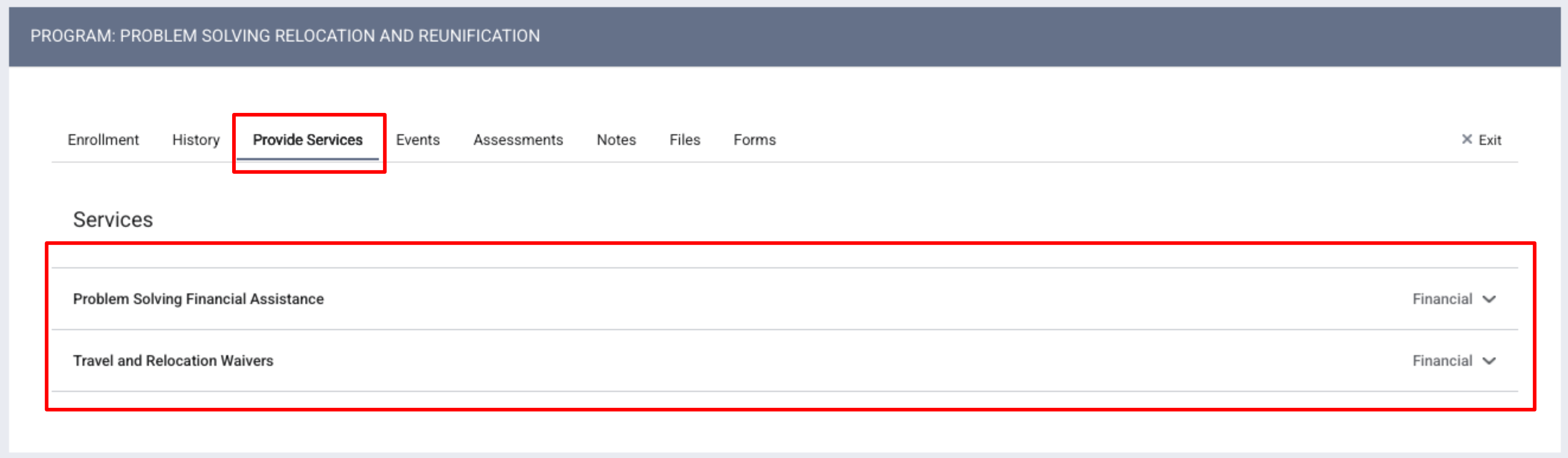
Services

- Problem Solving Financial Assistance
  - Must be recorded for all clients receiving funds from program
  - Date *should match exactly* with the Problem Solving Conversation Event date where the answer to the “Client is housed/rehoused in a safe alternative” question is Yes
- Travel and Relocation Waivers
  - Contains 3 service items to track waiver process:
    - Waiver approved
    - Waiver Denied
    - Waiver Submitted



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Problem Solving Financial Assistance: Travel and relocation support

- Travel and relocation support outside of San Francisco that will result in a housing connection - airline, train or bus ticket
- Travel and relocation support outside of San Francisco that will result in a housing connection- food stipend
- Travel and relocation support outside of San Francisco that will result in a housing connection- gas card
- Travel and relocation support that will result in a housing connection - pet transport fees

- 4 service items under Problem Solving Financial Assistance that are particular to Travel and relocation support
  - Use Other activities approved in advance through the Waiver Process (specify in Notes) to specify expense that does not fit neatly into these 4 categories

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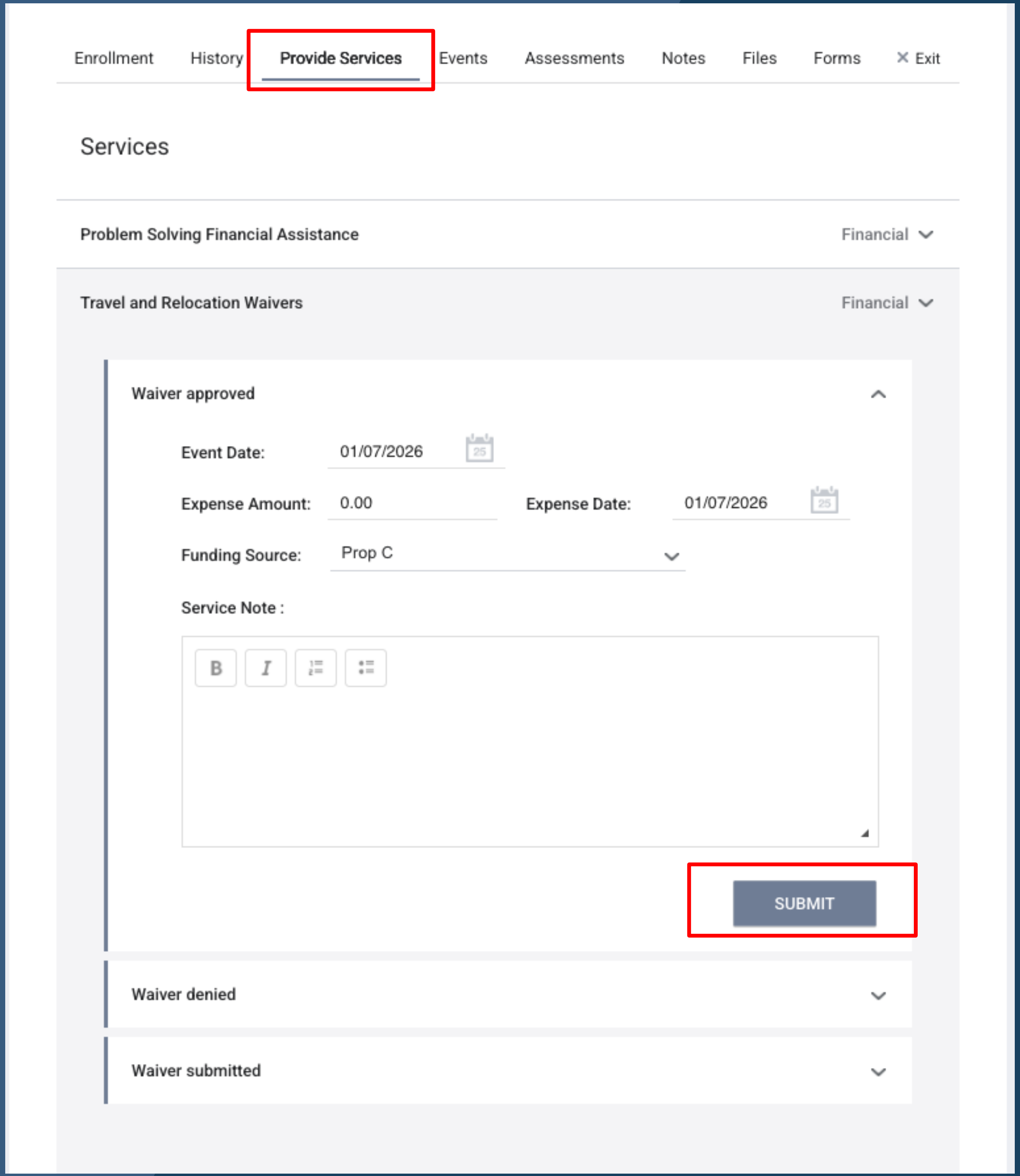
How to Submit a Service

While within a program enrollment

1. Click on Provide Services Tab
2. Click on Service Name
3. Click on the appropriate Service item
4. Adjust for appropriate date, expense amount, expense date, and funding source
5. Write note
6. Include group members (if appropriate)
7. Click Submit
8. Find Submitted Service in the History tab within program enrollment



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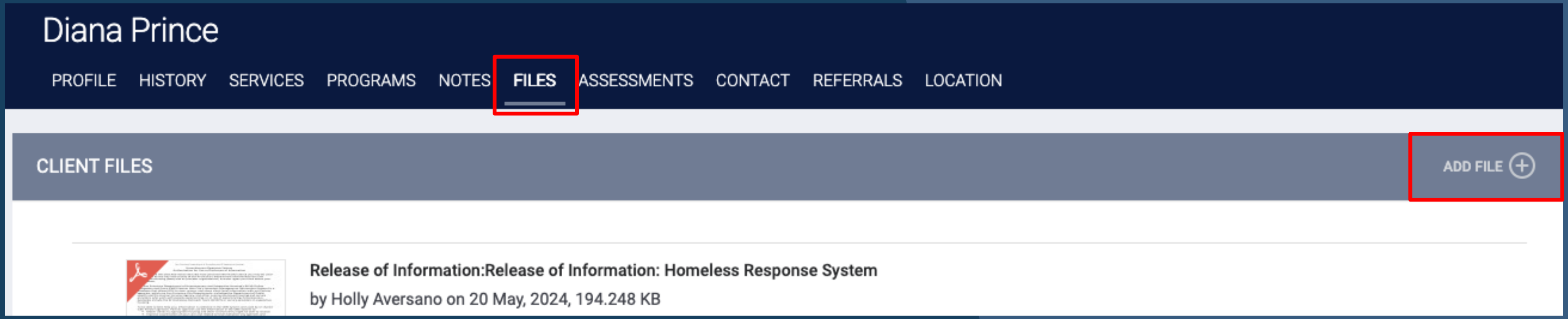
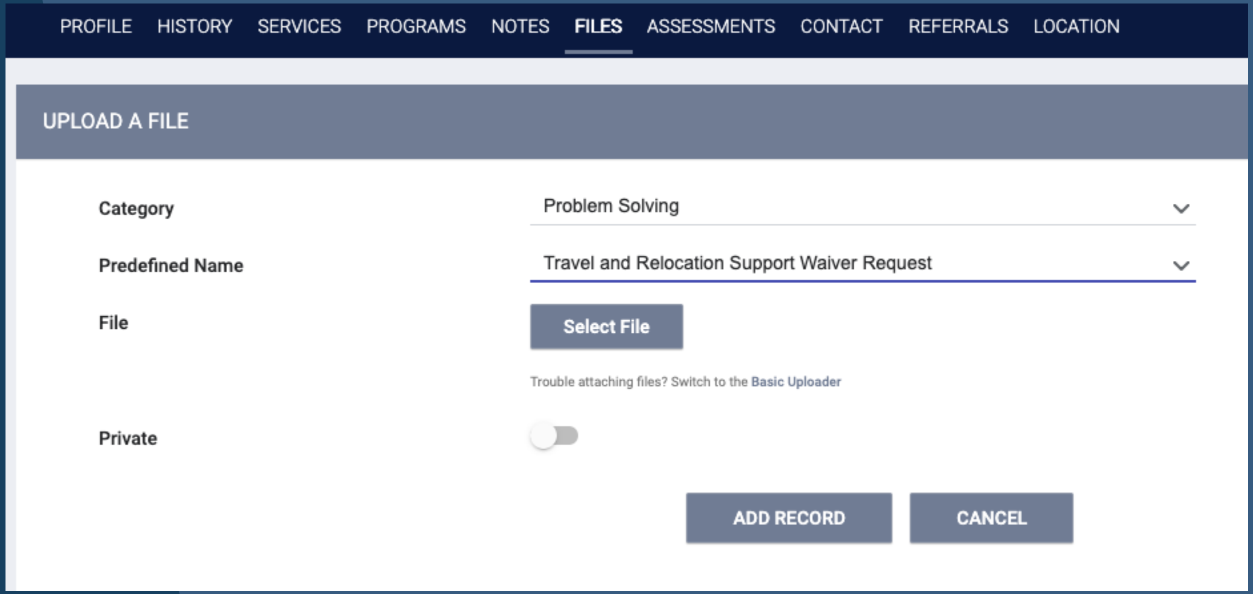
Uploading Files

Uploading a File in ONE



To upload a File:

1. Select the Files tab
2. Click Add File
3. Select the appropriate category: Problem Solving
4. Select the appropriate Predefined Name
5. Select your file from your computer using the Select File button
6. Click Save Changes



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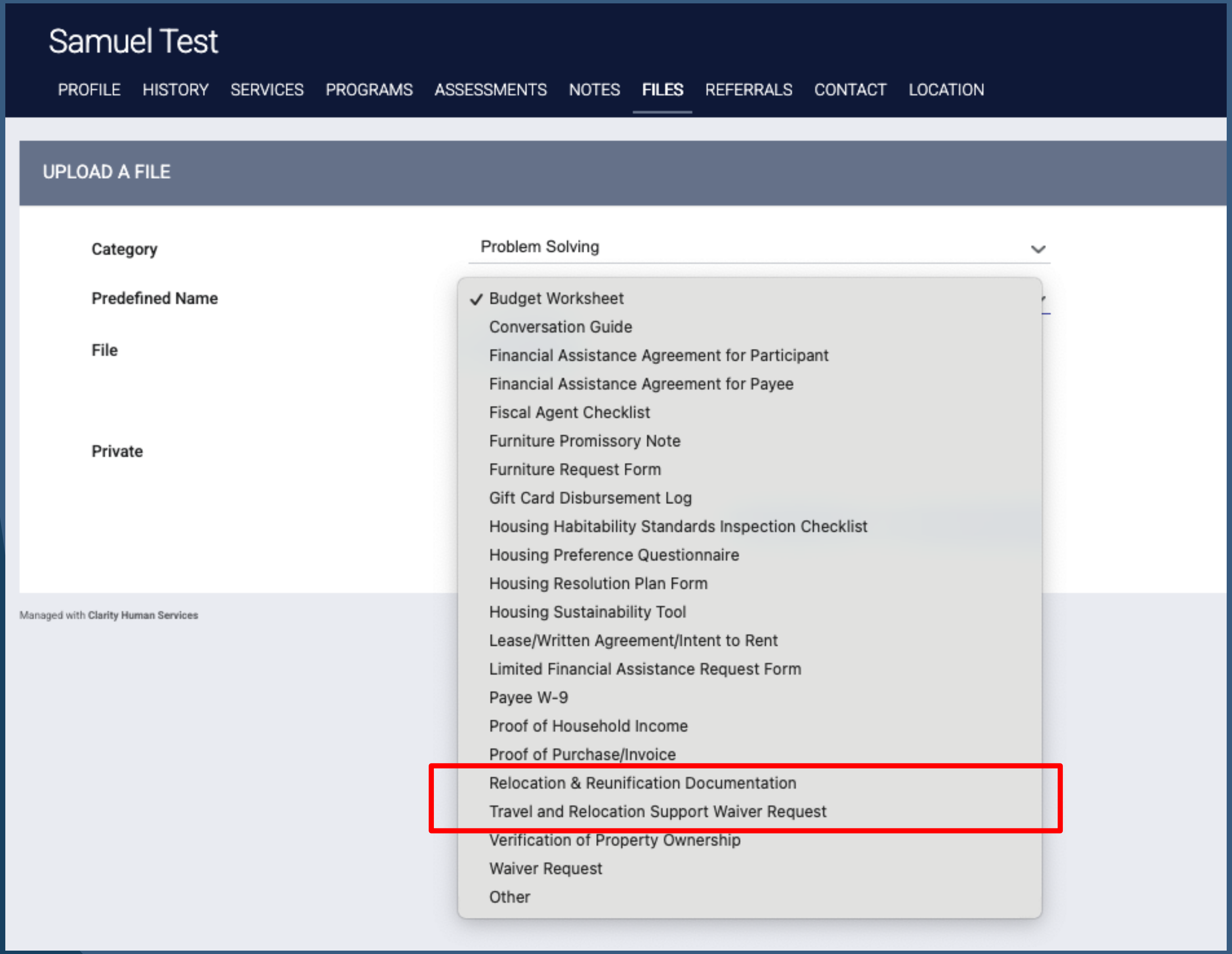
PS Relocation and Reunification Files



- Two “Predefined Name” under the Problem Solving file Category particular to PS Relocation and Reunification program:
  - Relocation and Reunification Documentation
  - Travel and Relocation Support Waiver Request

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Program Exits

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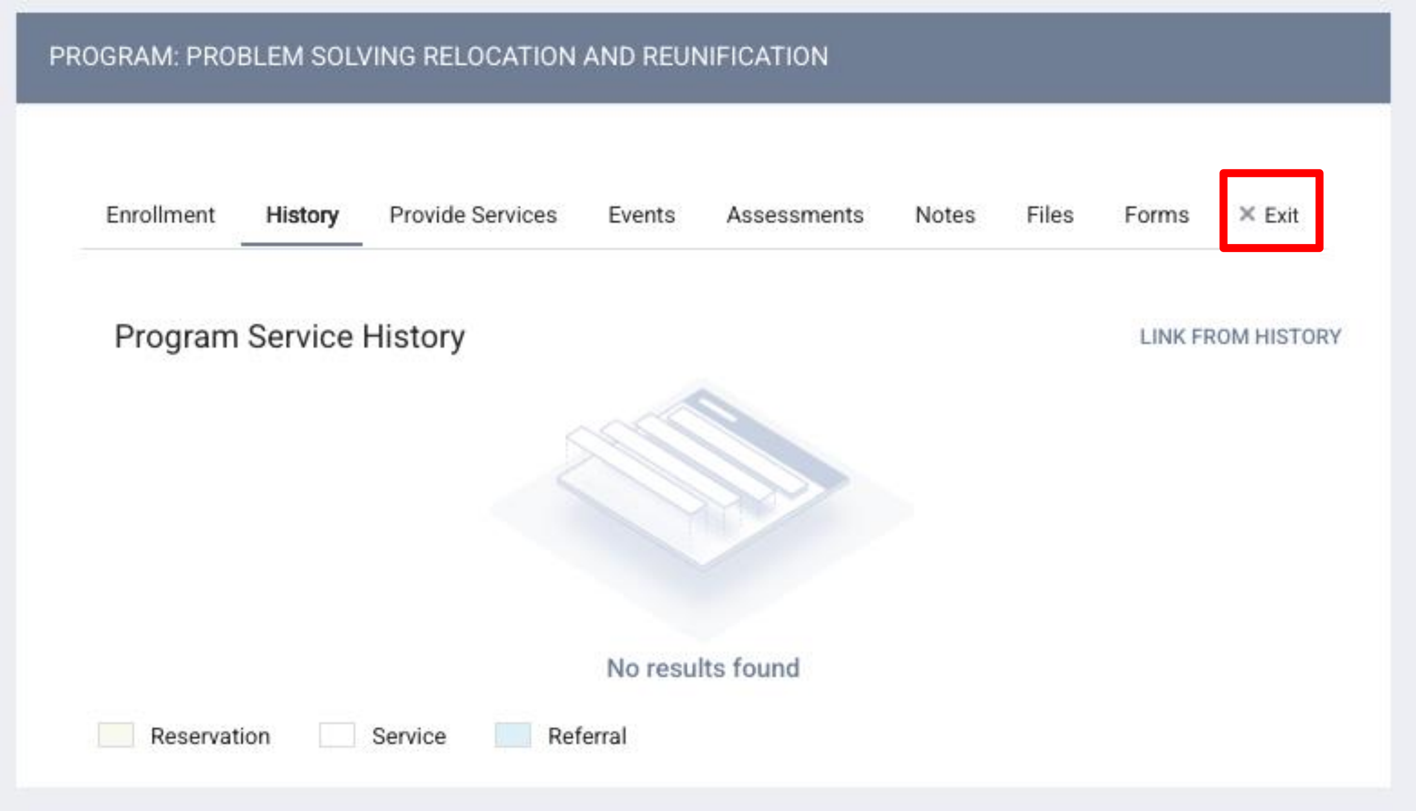
Program Exits

To exit a client:

1. Go to client enrollment
2. Click ‘Exit’ in the top righthand corner of enrollment
3. Complete Exit form and click ‘Save & Close’



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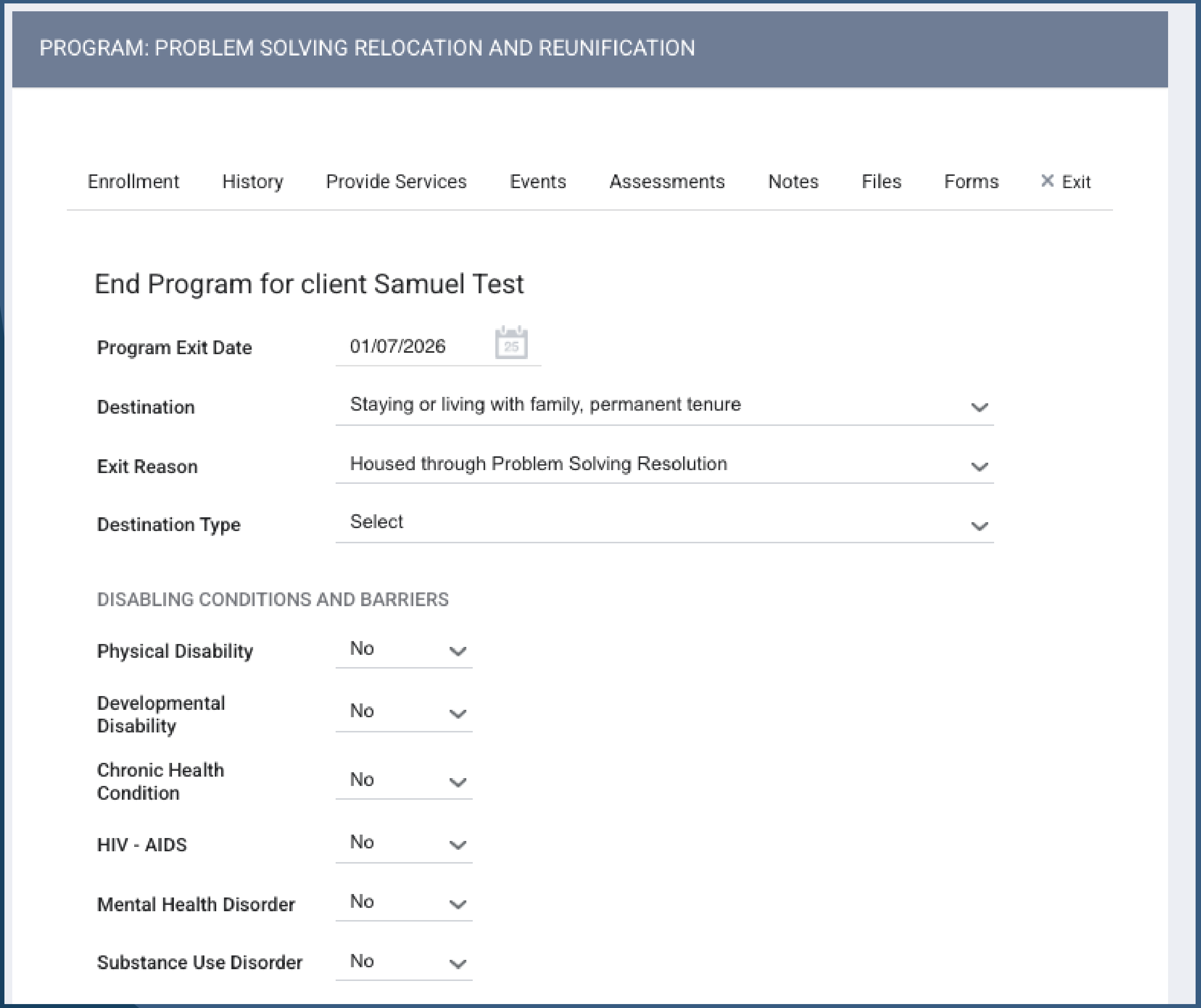
Program Exits: Exit Form


PROGRAM: PROBLEM SOLVING RELOCATION AND REUNIFICATION

Enrollment | History | Provide Services | Events | Assessments | Notes | Files | Forms | ✕ Exit

End Program for client Samuel Test

Program Exit Date	01/07/2026
Destination	Staying or living with family, permanent tenure
Exit Reason	Housed through Problem Solving Resolution
Destination Type	Select

DISABLING CONDITIONS AND BARRIERS

Physical Disability	No
Developmental Disability	No
Chronic Health Condition	No
HIV - AIDS	No
Mental Health Disorder	No
Substance Use Disorder	No

- Program Exit Date is the date that the client exited from the program
- Exit destination should be Staying or living with friends/family (temporary or permanent)
- Exit reason should be "Housed through Problem Solving Resolution"
- Destination type, zip code (or country) fields will appear based on exit destination

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Reporting

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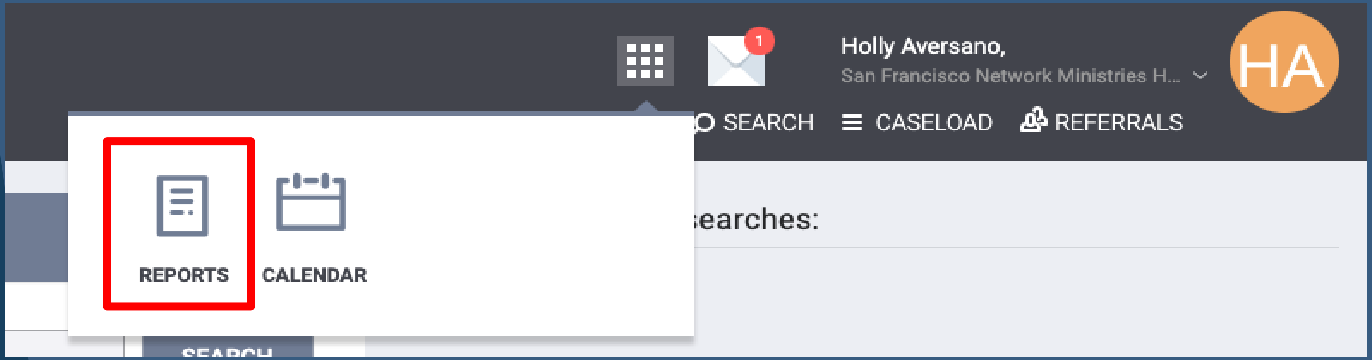
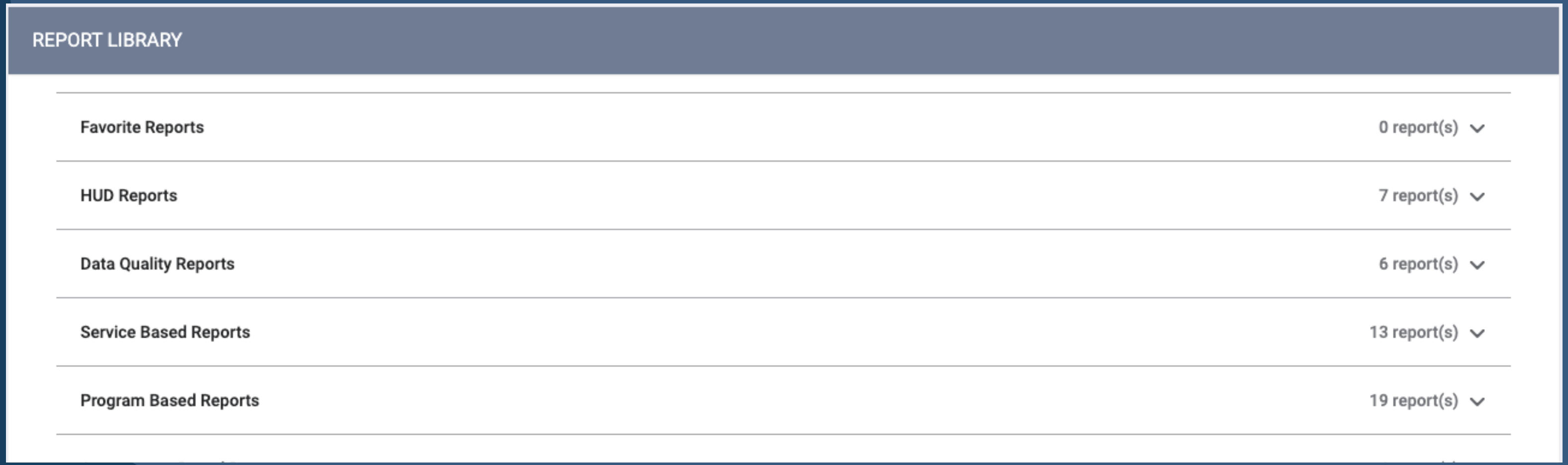
Reports Library





- Contains ready made or "canned" reports
- To access, click the Reports icon from the Launchpad.
- Ability to "Favorite" reports

Program Roster Report

- [GNRL-106] Program Roster
  - Found in Reports Library under Program Based Reports
  - Lists program stay and relevant household information for selected program(s)
  - Useful in ensuring program rosters, enrollments, and exits are reflected accurately the database
  - Helpful to run for Active clients within a particular reporting timeframe

Program Based Reports

- [EMPL-101] Employment Report
- [EMPL-102] Employment / Education Report
- [EXIT-101] Potential Exits
- [EXPS-103] Program Funding Source Financial Detail
- [GNRL-105] Program Participation Summary
- [GNRL-106] Program Roster
- [GNRL-220] Program Details Report [2022]

Head of Household (HoH) Unique Identifiers are listed in bold text. Household members are grouped together with the HoH.

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff
Program: Problem Solving Relocation and Reunification												
Flintstone, Fred	**38365D760**	05/05/1981	44	44	12/31/2025	-	8		0	0	0	C. Thomsen
Potter, Harry	**1E6790D1D**	06/06/1999	26	26	01/06/2026	-	2		0	0	0	C. Thomsen
Test, Samuel	**270240F40**	08/08/1998	27	27	01/07/2026	-	1		0	0	0	H. Aversano
Snow, Frosty	**A245D13C4**	02/02/1992	33	33	01/07/2026	-	1		0	0	0	H. Aversano
Deere, Rudolph	7CA6BF14E	02/02/2002	23	23	01/07/2026	-	1		0	0	0	H. Aversano

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Bitfocus Resources

ONE System Help Site:

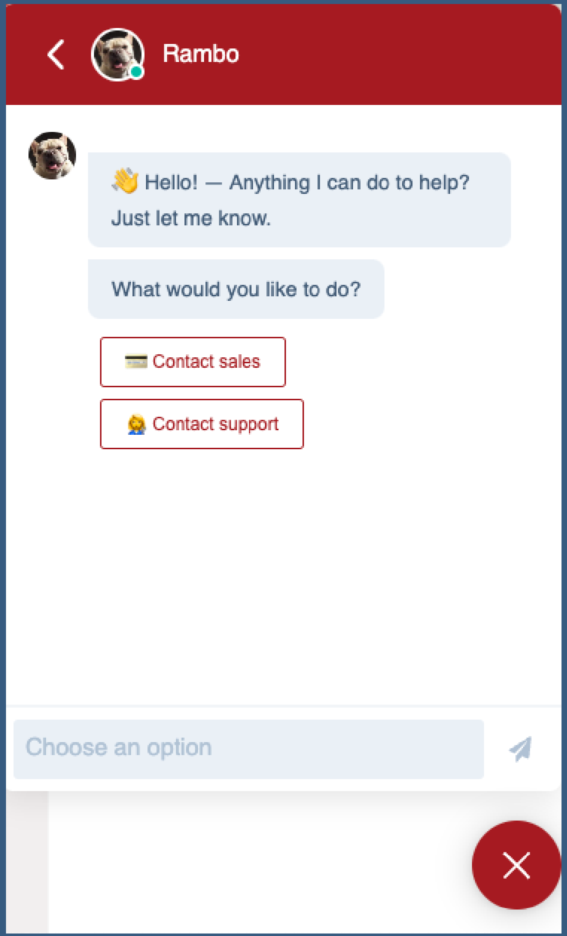
⇢ onesf.bitfocus.com

Bitfocus Help Desk

⇢ onesf@bitfocus.com

⇢ 415.429.4211

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



Questions?

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