



# Glide Relocation & Reunification Program Training

# 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

# 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

SEARCH FOR A CLIENT

ADD CLIENT +

SEARCH

Enter search terms for a client

Use full name, partial name, date of birth or any combination.

CREATE A NEW CLIENT

Social Security Number

Quality of SSN

Last Name

First Name

Quality of Name

Quality of DOB

Date of Birth

Middle Name

Suffix

None

Alias

What is the client's current gender identity?

What is the appropriate pronoun to use when addressing the client?

Race and Ethnicity

Additional Race and Ethnicity Detail

Primary Language

Secondary Language

# 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

# 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

RELEASE OF INFORMATION

Permission	Yes	<input type="button" value="▼"/>
Start Date	05/15/2024	<input type="button" value="25"/>
End Date	05/15/2027	<input type="button" value="25"/>
Documentation	<input type="button" value="✓ Select"/> <input type="button" value="Electronic Signature"/> <input type="button" value="Verbal Consent"/>	

ELECTRONIC SIGNATURE FORM

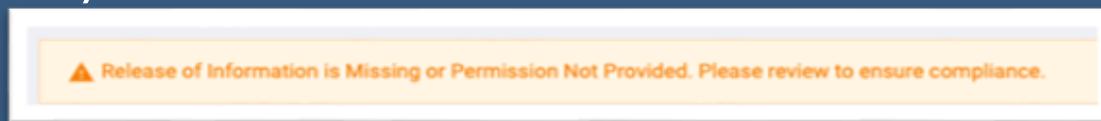
By completing this form, you are certifying the client:

1) was notified of the Department of Homelessness and Supportive Housing Notice of Privacy Policy  
2) completed the Release of Information: Homeless Response System as required for the ONE System

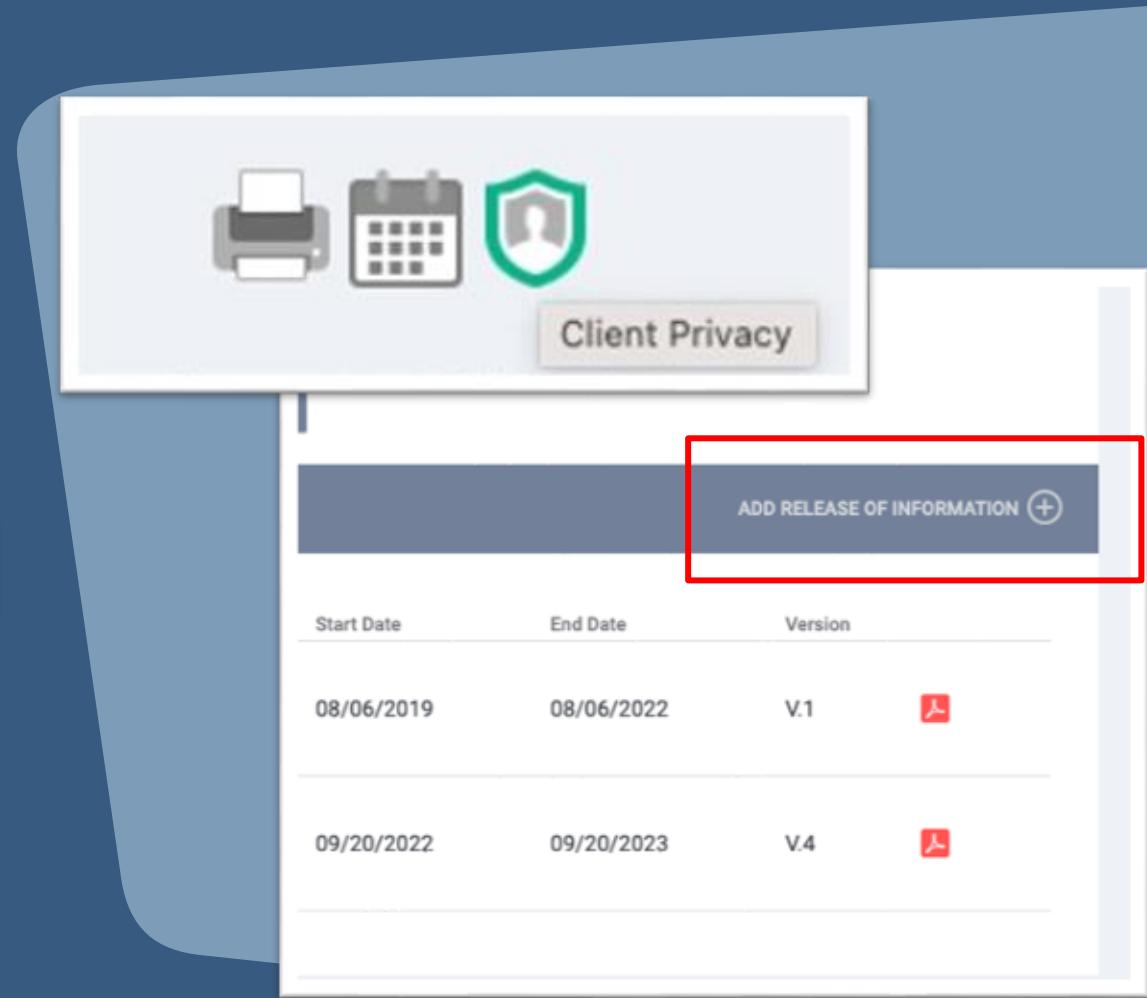
**Any signed Release of Information forms must be uploaded in client files.**

# Release of Information in ONE

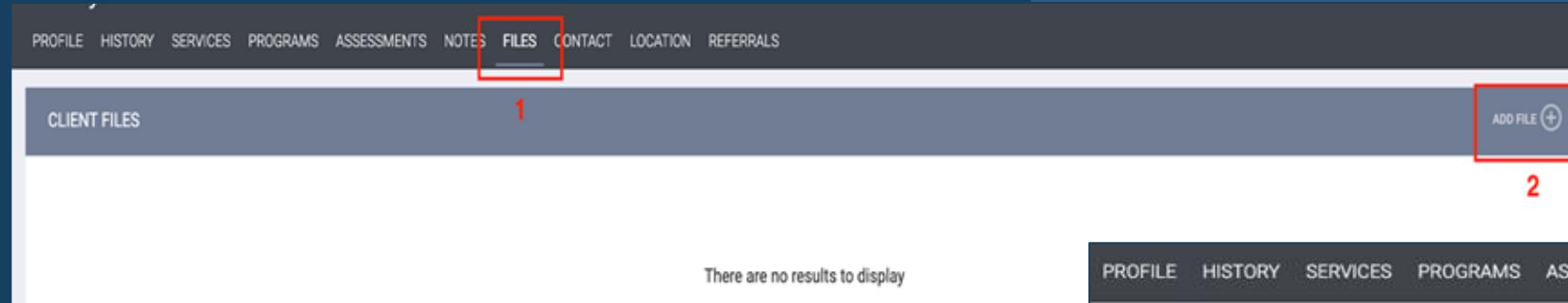
- ONE will prompt for a Release of Information to be completed when a client profile is created and must be updated every 3 years
- Profiles with missing or expired Releases of Information will be flagged with a yellow banner



- 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)



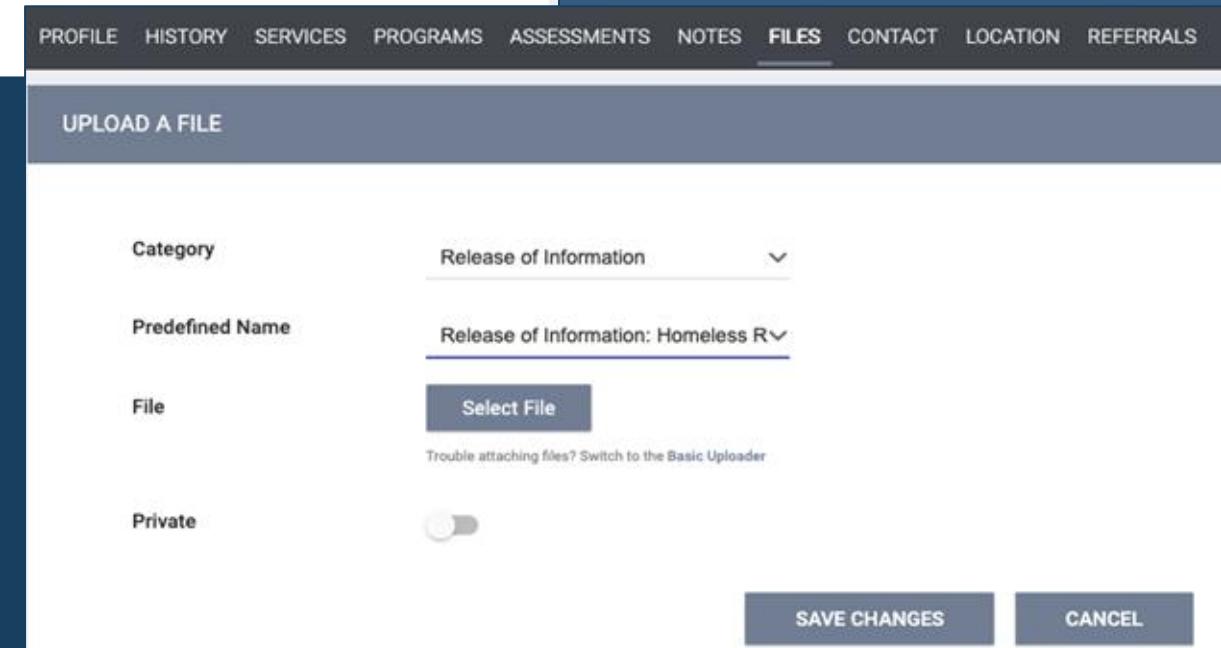
# Uploading an ROI as a File in ONE



The screenshot shows the ONE software interface. At the top, there is a navigation bar with tabs: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. The FILES tab is highlighted with a red box and the number '1' above it. Below the navigation bar is a section titled 'CLIENT FILES' with a red box around the 'ADD FILE' button, which has a plus sign icon. The main content area displays the message 'There are no results to display'.

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



The screenshot shows the 'UPLOAD A FILE' dialog box. At the top, there is a navigation bar with tabs: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. The FILES tab is highlighted with a red box and the number '2' above it. The dialog box has a title 'UPLOAD A FILE'. It contains the following fields:

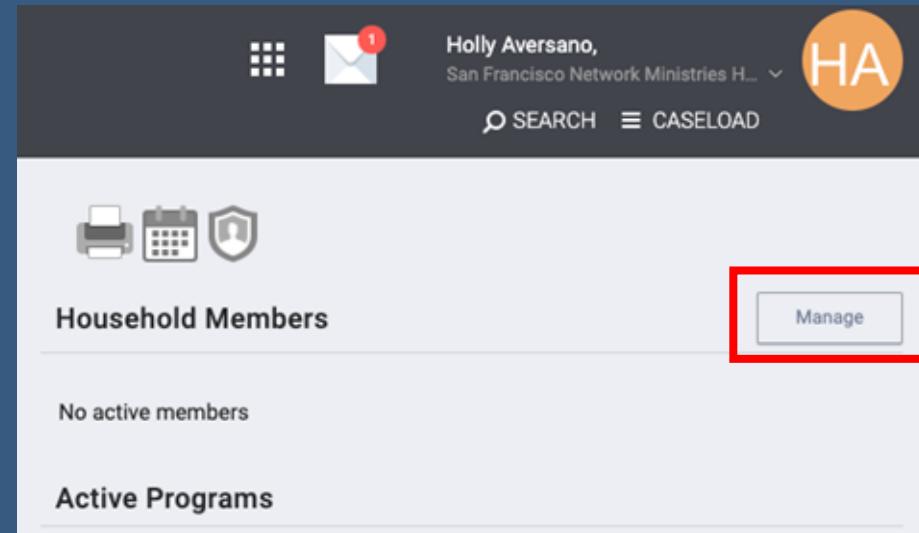
- Category: Release of Information
- Predefined Name: Release of Information: Homeless R
- File: Select File (button)
- Private: A toggle switch that is off

At the bottom of the dialog box are two buttons: 'SAVE CHANGES' and 'CANCEL'.

# Managing Households

# Managing Households in ONE: Client Profile

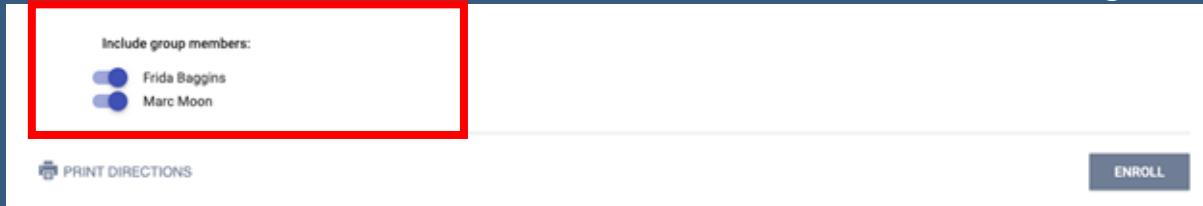
- You can add and remove household members on the client profile
- Is a necessary step when enrolling households of 2 or more people into a program
- Be sure to indicate a Head of Household
  - Member Type should always reflect the relationship to the Head of Household



HOUSEHOLD MANAGEMENT				
Search for a Household Member				
Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.				
Client	Date of Birth	Last Four SSN	Last Updated	
Stacy TestSFNMHC	01/15/1972	6821	01/26/2023	
<a href="#">+ Add</a> testSFNMHC Bitfocus	03/01/2000	0000	01/23/2023	

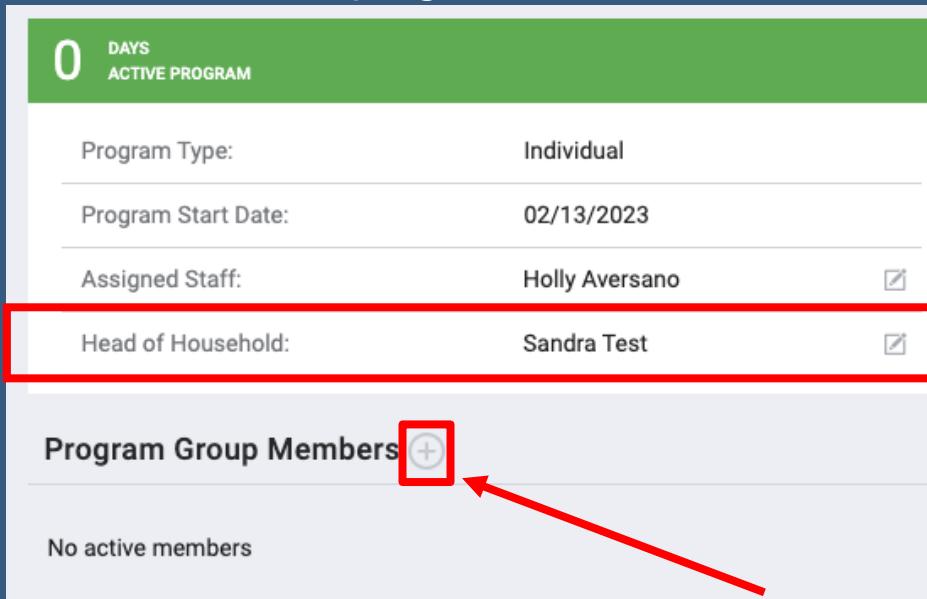
# Managing Households in ONE: Client Enrollment

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



A screenshot of a client enrollment form. At the top left, there is a section labeled "Include group members:" with two entries: "Frida Baggins" and "Marc Moon". This section is highlighted with a red box. At the bottom left is a "PRINT DIRECTIONS" button, and at the bottom right is an "ENROLL" button.

→ Or within an active program enrollment:



A screenshot of an active program enrollment form. At the top left, it shows "0 DAYS ACTIVE PROGRAM". The form includes fields for "Program Type: Individual", "Program Start Date: 02/13/2023", "Assigned Staff: Holly Aversano", and "Head of Household: Sandra Test". The "Head of Household" field is highlighted with a red box. At the bottom left, there is a section titled "Program Group Members" with a red box around the "Add" button (+). Below it, it says "No active members". A red arrow points from the text "Household members must be added as members at the client profile first before appearing as available members to add to an enrollment" to the "Add" button.

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

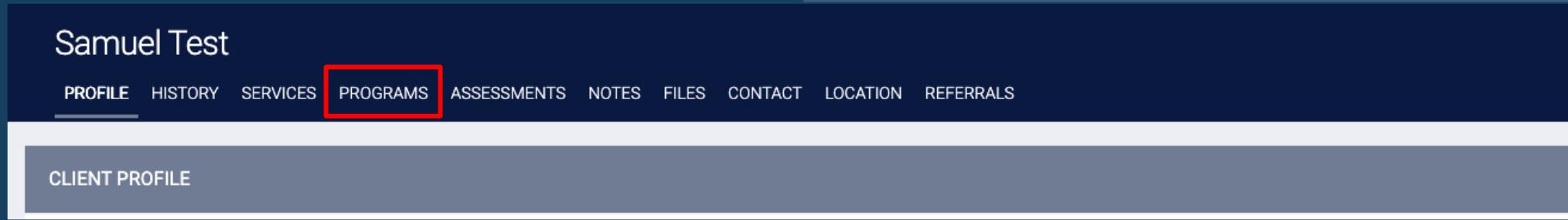
# Program Enrollments

# Program Enrollments

Samuel Test

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

CLIENT PROFILE



→ 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

PROGRAMS: AVAILABLE

Glide Problem Solving – Prop C

Glide Walk-In Center

Problem Solving Relocation and Reunification

Active Clients

2 CLIENTS

0 % Families

100 % Individuals

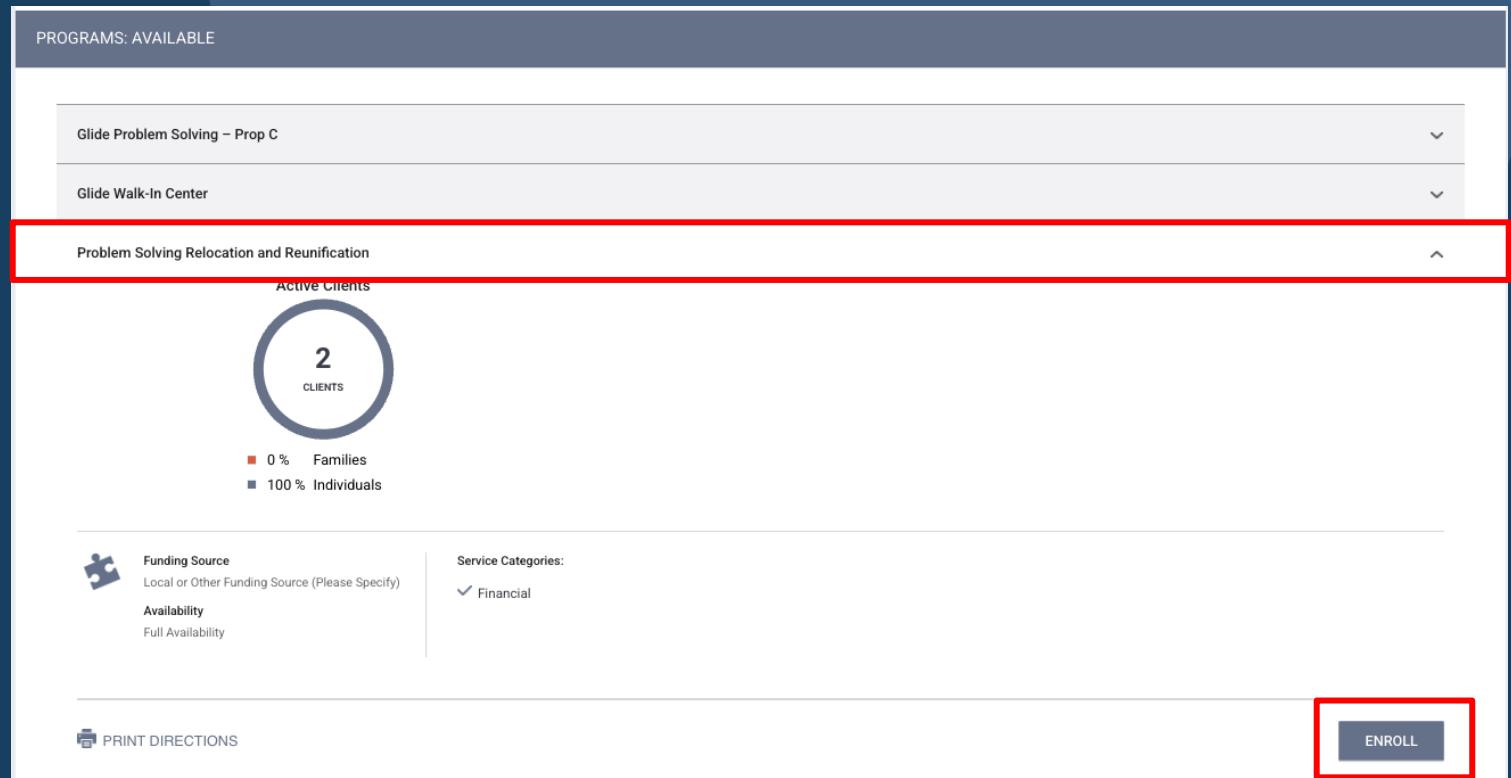
Funding Source: Local or Other Funding Source (Please Specify)

Availability: Full Availability

Service Categories:  Financial

PRINT DIRECTIONS

ENROLL



# 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

Samuel Test

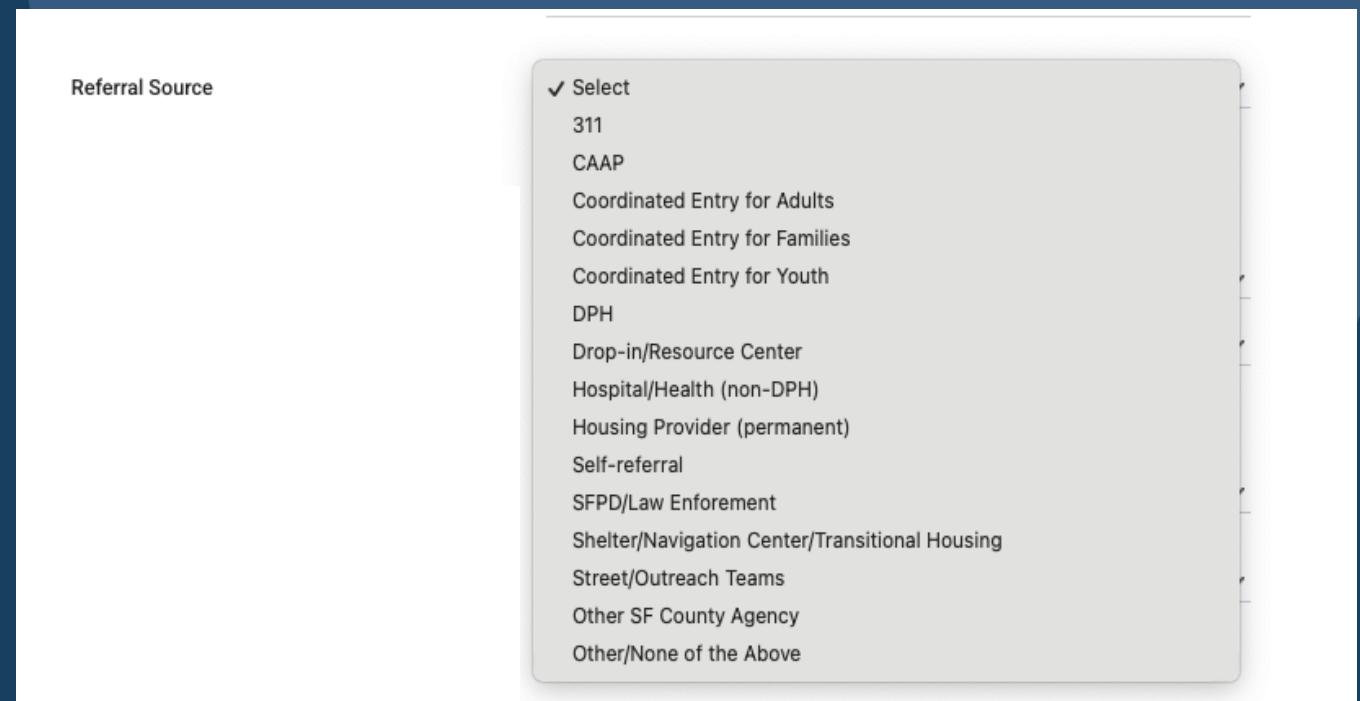
PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES REFERRALS CONTACT LOCATION

Enroll 'Problem Solving Relocation and Reunification' program for client Samuel Test

Program Date	01/07/2026 <input type="button" value="calendar"/>
TRANSLATION ASSISTANCE NEEDED	
Translation Assistance Needed	Select <input type="button" value="▼"/>
Housing Status at Entry	
Housing Status at Entry	Select <input type="button" value="▼"/>
Referral Source	
Referral Source	Select <input type="button" value="▼"/>
PRIOR LIVING SITUATION	
Type of Residence	Select <input type="button" value="▼"/>
Length of Stay in Prior Living Situation	Select <input type="button" value="▼"/>
Approximate date this episode of homelessness started	<input type="text" value="1/1/2026"/> <input type="button" value="calendar"/>
Number of times on the streets, in ES, or Safe Haven in the past three years	Select <input type="button" value="▼"/>
Total number of months homeless on the streets, in ES, or Safe Haven in the past three years	Select <input type="button" value="▼"/>
LIFETIME LENGTH OF HOMELESSNESS IN SF	
Have you ever been homeless in SF?	Select <input type="button" value="▼"/>
LIFETIME LENGTH OF HOMELESSNESS OUTSIDE OF SF	
Have you ever been homeless outside of San Francisco?	Select <input type="button" value="▼"/>

# Program Enrollments: Referral Source

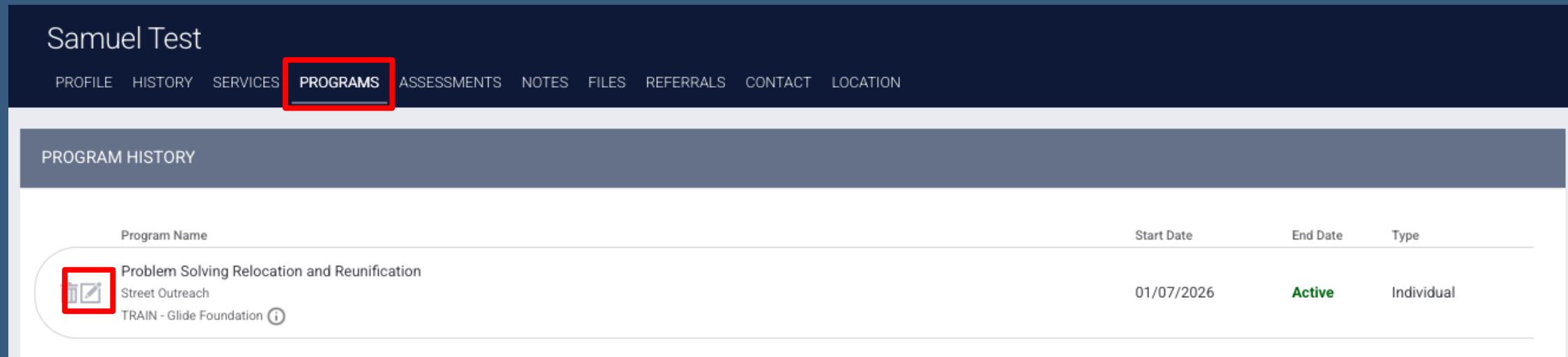
- Appears on enrollment screen
- Includes 'Other' options if household referral source does not appear on list.
- Additional questions may appear depending on selection.



# 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.



Samuel Test

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

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
Problem Solving Relocation and Reunification Street Outreach TRAIN - Glide Foundation <small>(i)</small>	01/07/2026	<b>Active</b>	Individual

# Events and Services

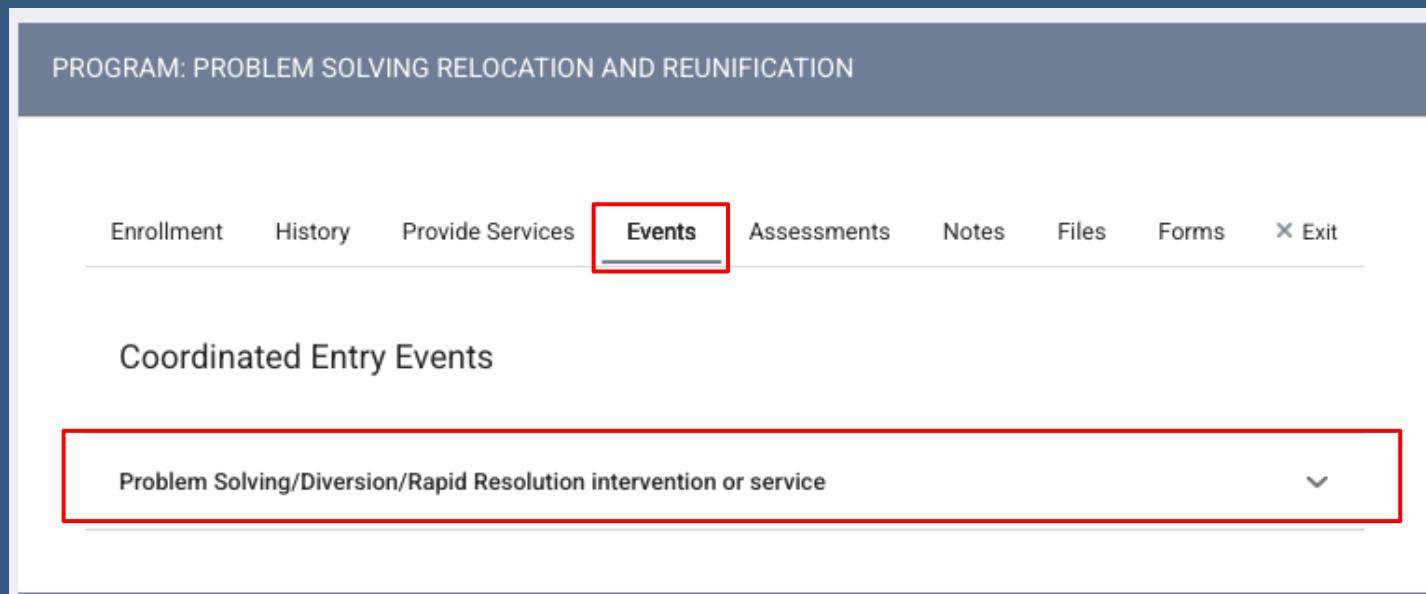
# Events

## → 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.



# 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

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

Coordinated Entry Events

Problem Solving/Diversion/Rapid Resolution intervention or service

Problem Solving Travel and Relocation Support: Referral to substance use treatment or sobering center

Problem Solving Conversation: Problem Solving Conversation

Date: 01/07/2026

Result: Client housed/re-housed in a safe alternative

Event Note:

**SUBMIT**

# 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

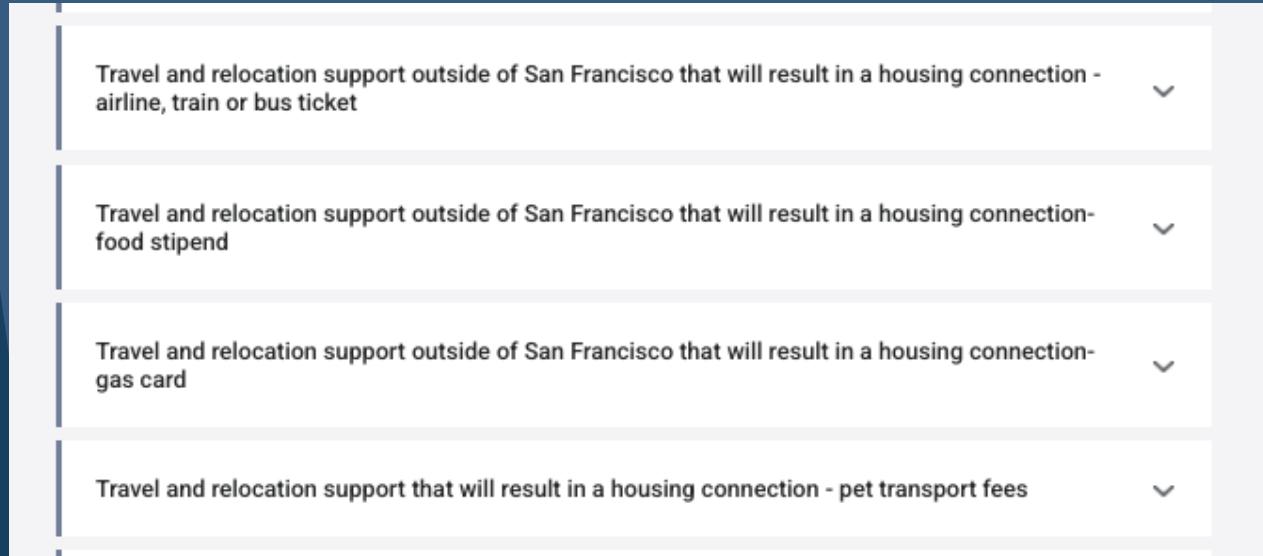
PROGRAM: PROBLEM SOLVING RELOCATION AND REUNIFICATION

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

Services

Problem Solving Financial Assistance	Financial <span>▼</span>
Travel and Relocation Waivers	Financial <span>▼</span>

# Problem Solving Financial Assistance: Travel and relocation support



- 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

# 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

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

Services

Problem Solving Financial Assistance Financial ▾

Travel and Relocation Waivers Financial ▾

**Waiver approved**

Event Date: 01/07/2026 25

Expense Amount: 0.00 Expense Date: 01/07/2026 25

Funding Source: Prop C

Service Note :

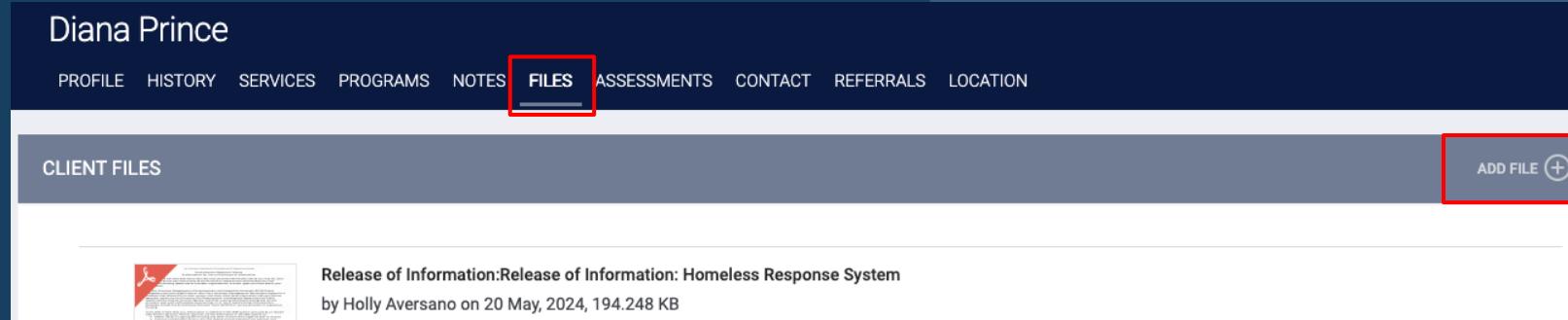
**Waiver denied**

**Waiver submitted**

**SUBMIT**

# Uploading Files

# Uploading a File in ONE



Diana Prince

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

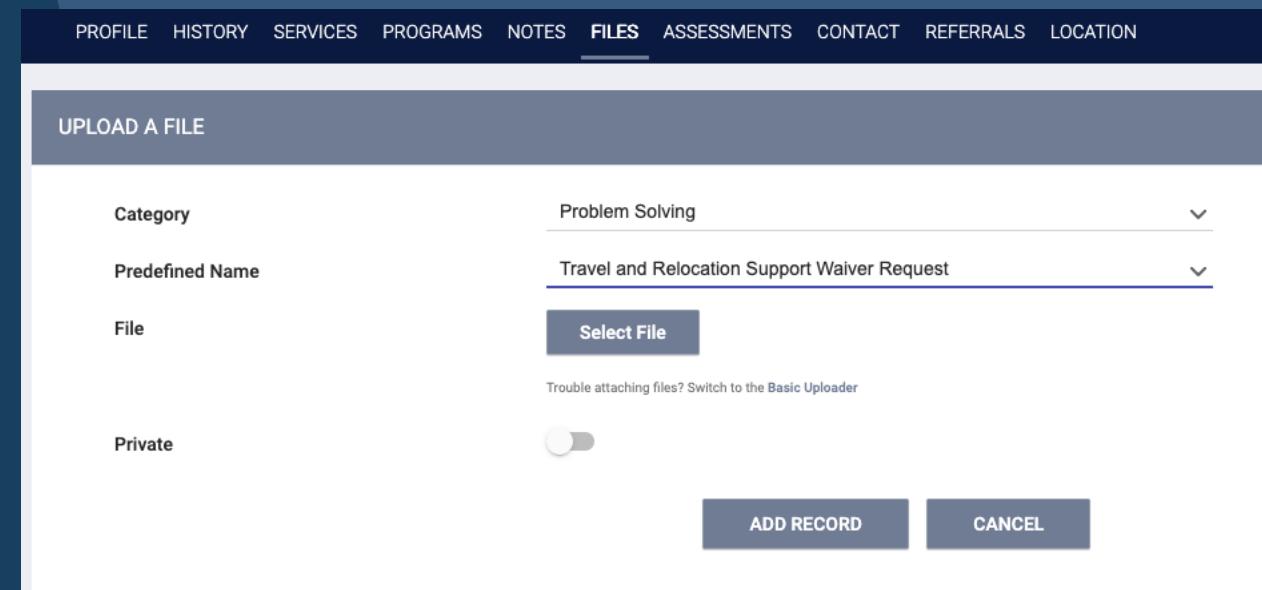
CLIENT FILES

ADD FILE +

Release of Information:Release of Information: Homeless Response System  
by Holly Aversano on 20 May, 2024, 194.248 KB

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**



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

UPLOAD A FILE

Category: Problem Solving

Predefined Name: Travel and Relocation Support Waiver Request

File:

Private:

Trouble attaching files? Switch to the Basic Uploader

ADD RECORD CANCEL

Samuel Test

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES REFERRALS CONTACT LOCATION

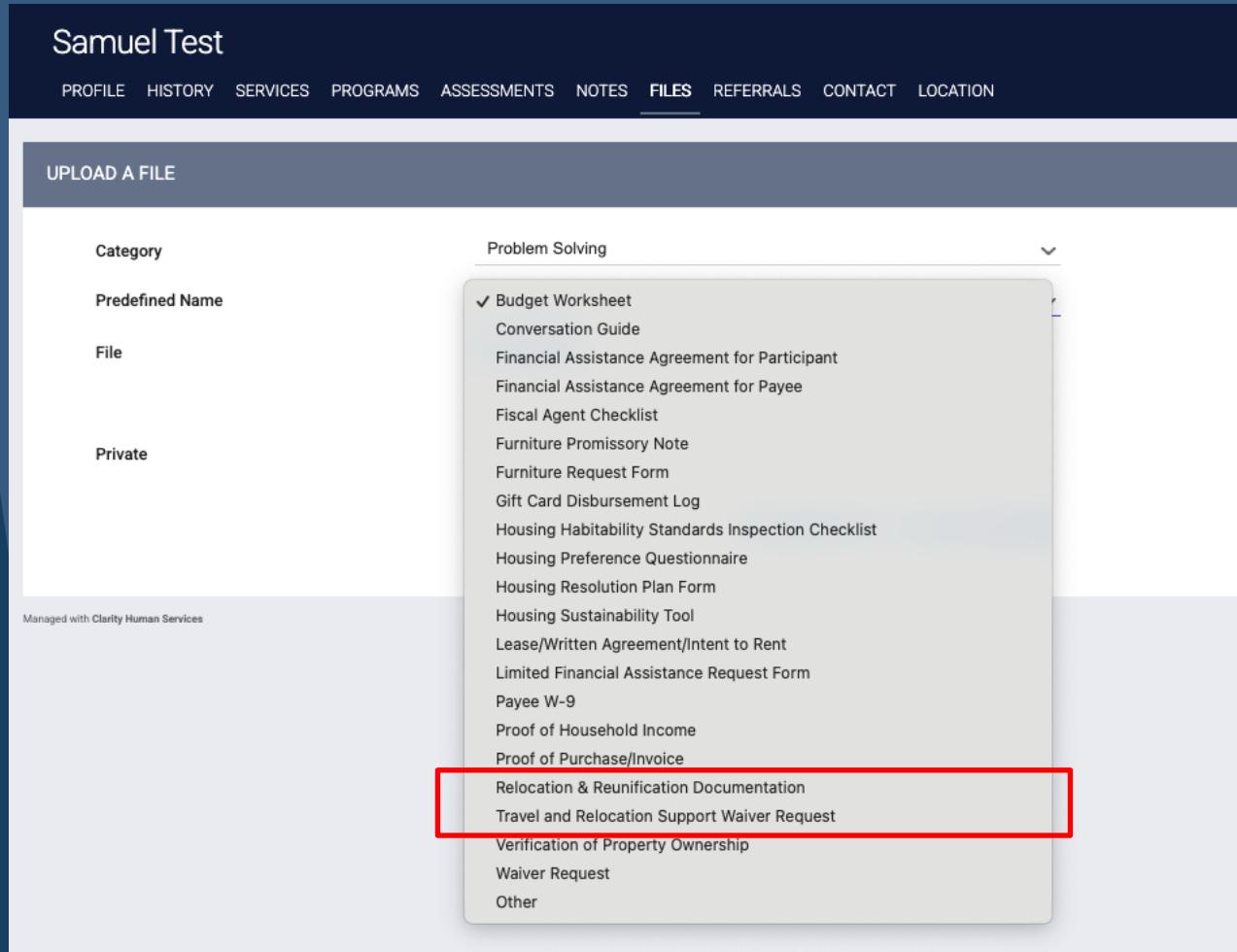
UPLOAD A FILE

Category: Problem Solving

Predefined Name:

- ✓ Budget Worksheet
- Conversation Guide
- Financial Assistance Agreement for Participant
- Financial Assistance Agreement for Payee
- Fiscal Agent Checklist
- Furniture Promissory Note
- Furniture Request Form
- Gift Card Disbursement Log
- Housing Habitability Standards Inspection Checklist
- Housing Preference Questionnaire
- Housing Resolution Plan Form
- Housing Sustainability Tool
- Lease/Written Agreement/Intent to Rent
- Limited Financial Assistance Request Form
- Payee W-9
- Proof of Household Income
- Proof of Purchase/Invoice
- Relocation & Reunification Documentation
- Travel and Relocation Support Waiver Request
- Verification of Property Ownership
- Waiver Request
- Other

Managed with Clarity Human Services



# PS Relocation and Reunification Files

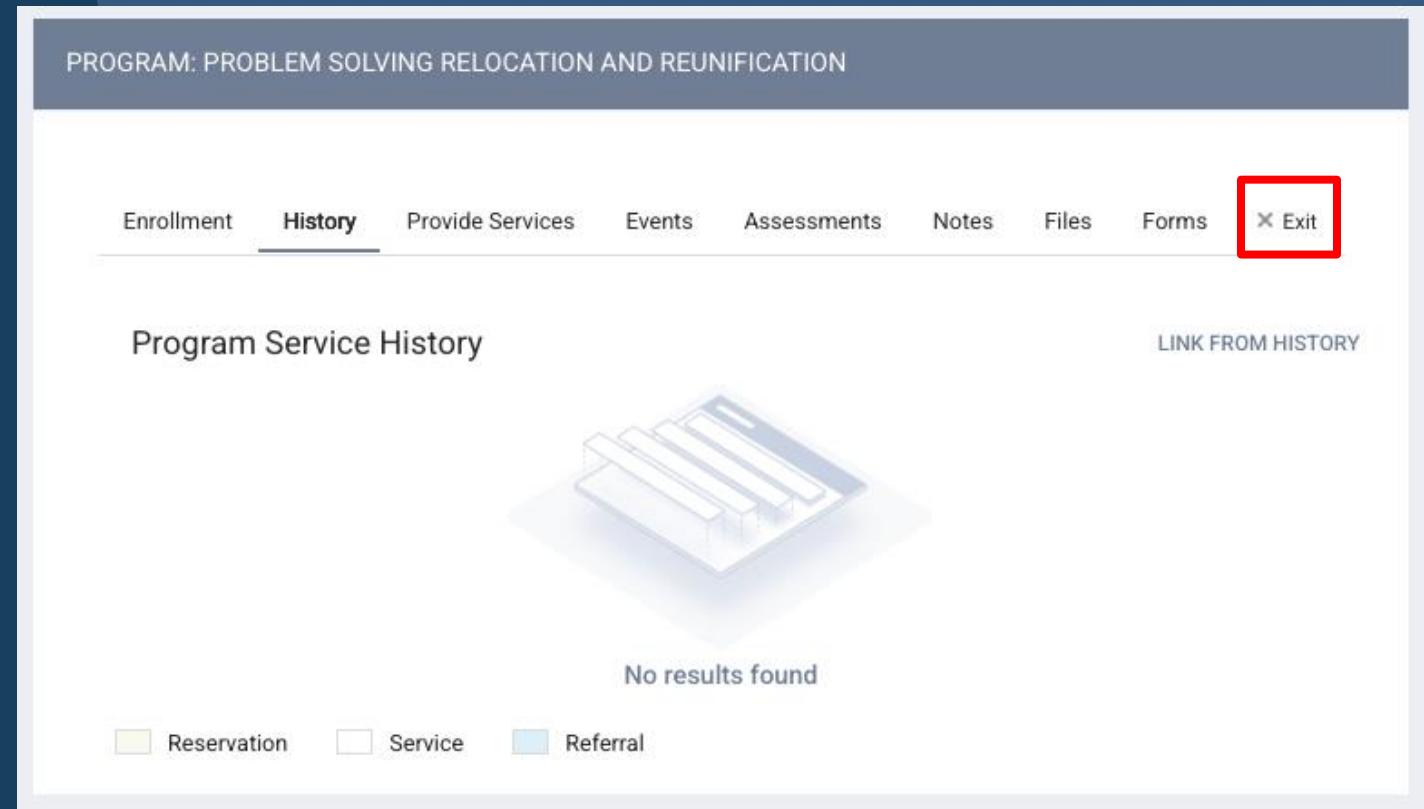
- Two “Predefined Name” under the Problem Solving file Category particular to PS Relocation and Reunification program:
  - Relocation and Reunification Documentation
  - Travel and Relocation Support Waiver Request

# Program Exits

# 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'



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 

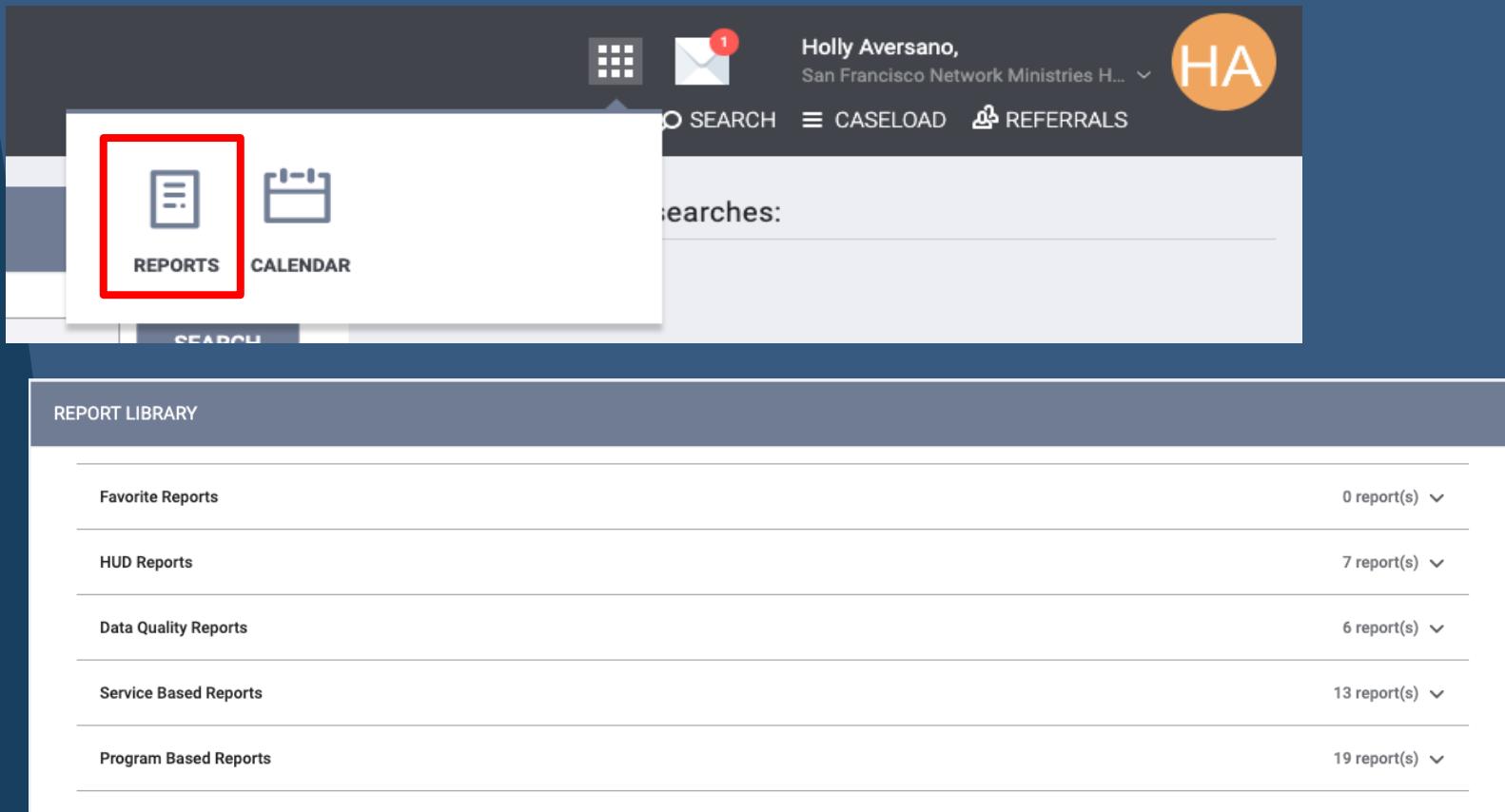
Substance Use Disorder No 

# Program Exits: Exit Form

- 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

# Reporting

# Reports Library



The screenshot shows the Launchpad interface of a software application. At the top, there is a dark header bar with the user's name, Holly Aversano, and a San Francisco Network Ministries logo. Below the header is a navigation bar with icons for SEARCH, CASELOAD, and REFERRALS. The main area is titled "Launchpad" and contains two buttons: "REPORTS" (which is highlighted with a red box) and "CALENDAR". Below this is a search bar with the placeholder text "Searches:". The bottom section is titled "REPORT LIBRARY" and lists several categories of reports with their respective counts:

Category	Count
Favorite Reports	0 report(s)
HUD Reports	7 report(s)
Data Quality Reports	6 report(s)
Service Based Reports	13 report(s)
Program Based Reports	19 report(s)

- 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.

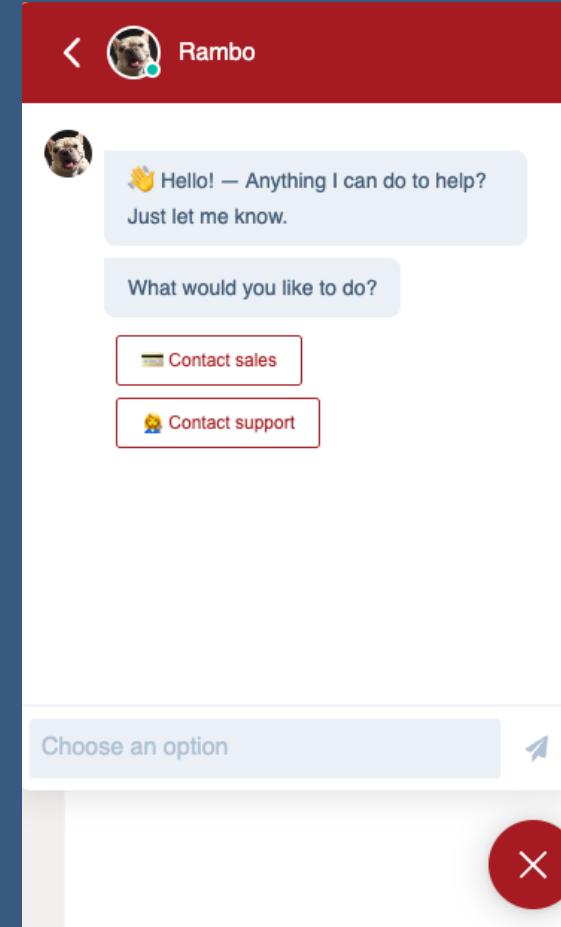
Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff
<b>Program: Problem Solving Relocation and Reunification</b>												
Flintstone, Fred	<b>38365D760</b>	05/05/1981	44	44	12/31/2025	-	8		0	0	0	C. Thomsen
Potter, Harry	<b>1E6790D1D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

# Bitfocus Resources

**ONE System Help Site:**  
→ [onesf.bitfocus.com](http://onesf.bitfocus.com)

**Bitfocus Help Desk**  
→ [onesf@bitfocus.com](mailto:onesf@bitfocus.com)  
→ 415.429.4211

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



# Questions?