



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

SEARCH

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

ADD CLIENT +

CREATE A NEW CLIENT

Social Security Number

Quality of SSN

Select

Last Name

First Name

Quality of Name

Select

Quality of DOB

Select

Date of Birth

Middle Name

Suffix None

Alias

What is the client's current gender identity?

Select

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

Select

Race and Ethnicity

Select

Additional Race and Ethnicity Detail

Primary Language

Select

Secondary Language

Select

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	▼
Start Date	05/15/2024	25
End Date	05/15/2027	25
Documentation	<div>✓ Select</div> <div>Electronic Signature</div> <div>Verbal Consent</div>	

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.

SAVE

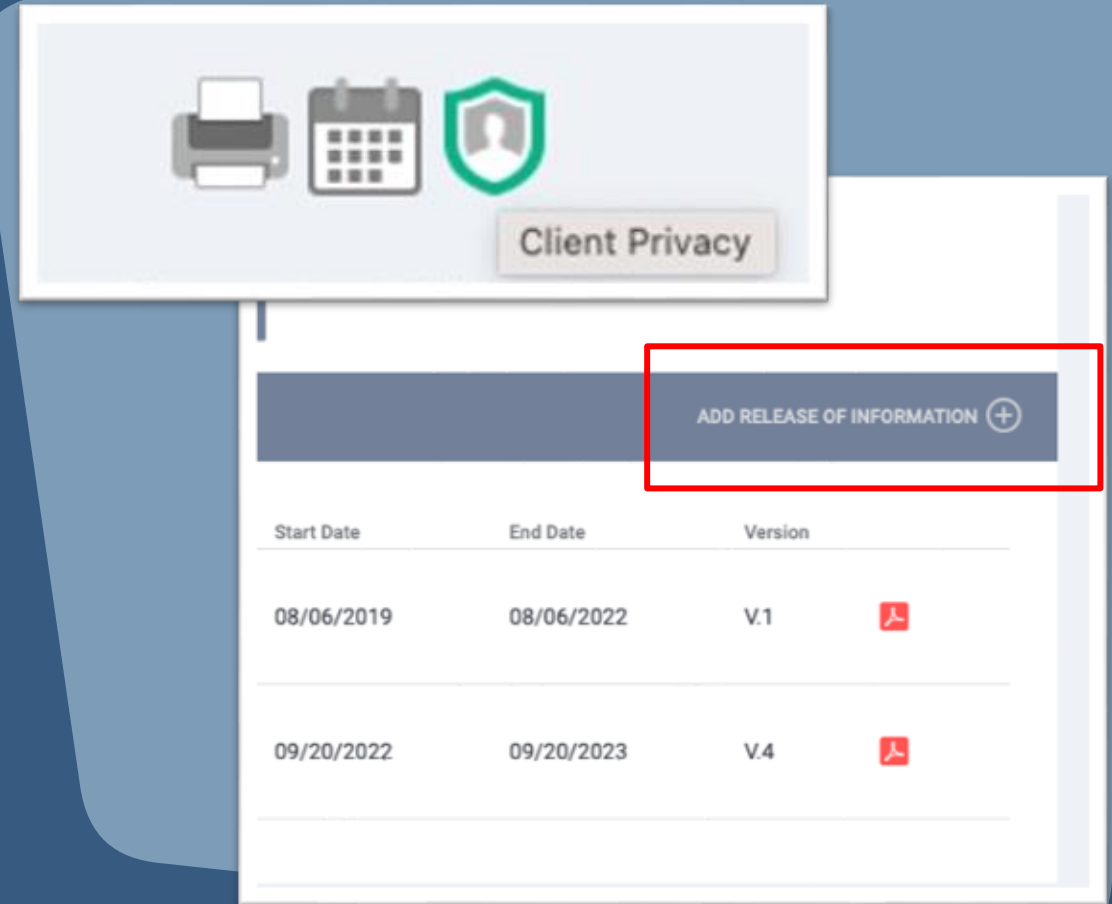
CANCEL

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

▲ Release of Information is Missing or Permission Not Provided. Please review to ensure compliance.

- 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)

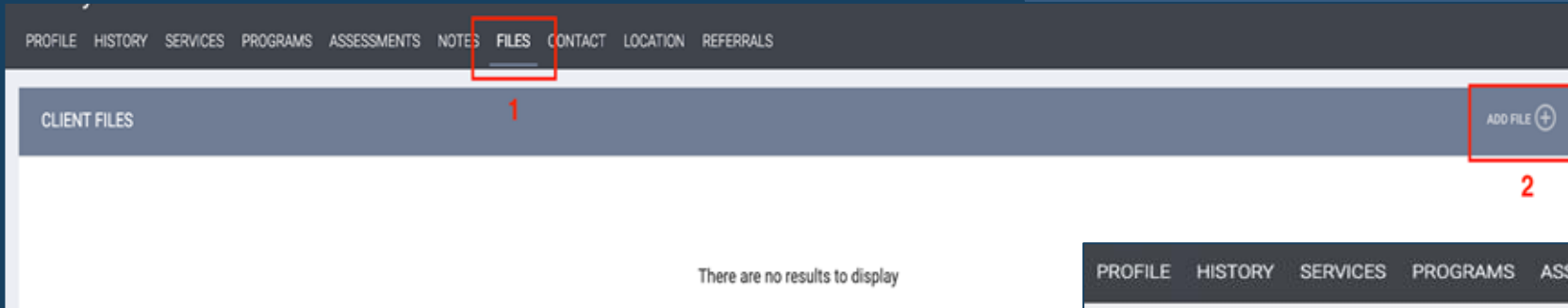


Client Privacy

ADD RELEASE OF INFORMATION (+)

Start Date	End Date	Version
08/06/2019	08/06/2022	V.1
09/20/2022	09/20/2023	V.4

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

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

UPLOAD A FILE

Category Release of Information

Predefined Name Release of Information: Homeless R

File Select File

[Trouble attaching files? Switch to the Basic Uploader](#)

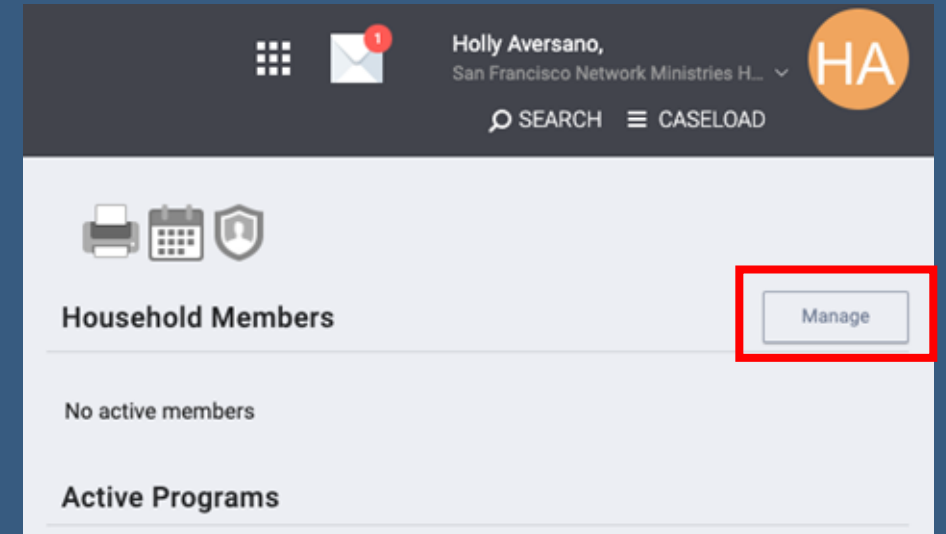
Private

SAVE CHANGES CANCEL

Managing Households

Managing Households in ONE: Client Profile

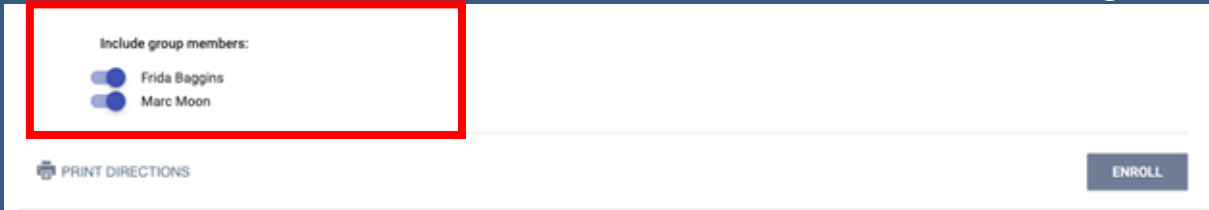
- You can add and remove household members on the client profile
- Is a necessary step when enrolling households of 2 or more people into a program
- Be sure to indicate a Head of Household
 - Member Type should always reflect the relationship to the Head of Household



HOUSEHOLD MANAGEMENT			
Search for a Household Member			
test			SEARCH
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
+ Add testSFNMin 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:



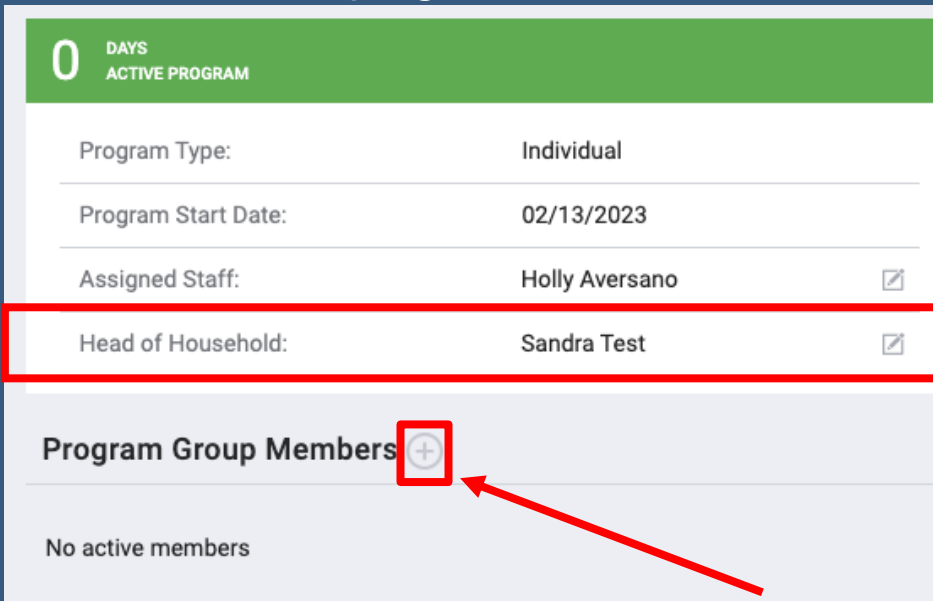
Include group members:

☒ Frida Baggins

☒ Marc Moon

[PRINT DIRECTIONS](#) [ENROLL](#)

---> Or within an active program enrollment:



0 DAYS
ACTIVE PROGRAM

Program Type: Individual

Program Start Date: 02/13/2023

Assigned Staff: Holly Aversano ☒

Head of Household: Sandra Test ☒

Program Group Members ☒

No active members

**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

PROFILEHISTORYSERVICESPROGRAMSASSESSMENTSNOTESFILESREFERRALSCONTACTLOCATION

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

Program Date

01/07/2026



TRANSLATION ASSISTANCE NEEDED

Translation Assistance Needed

Select

▼

Housing Status at Entry

Select

▼

Referral Source

Select

▼

PRIOR LIVING SITUATION

Type of Residence

Select

▼


Length of Stay in Prior Living Situation

Select

▼

Approximate date this episode of homelessness started

__/__/__



Number of times on the streets, in ES, or Safe Haven in the past three years

Select

▼

Total number of months homeless on the streets, in ES, or Safe Haven in the past three years

Select

▼

LIFETIME LENGTH OF HOMELESSNESS IN SF

Have you ever been homeless in SF?

Select


▼

LIFETIME LENGTH OF HOMELESSNESS OUTSIDE OF SF

Have you ever been homeless outside of San Francisco?

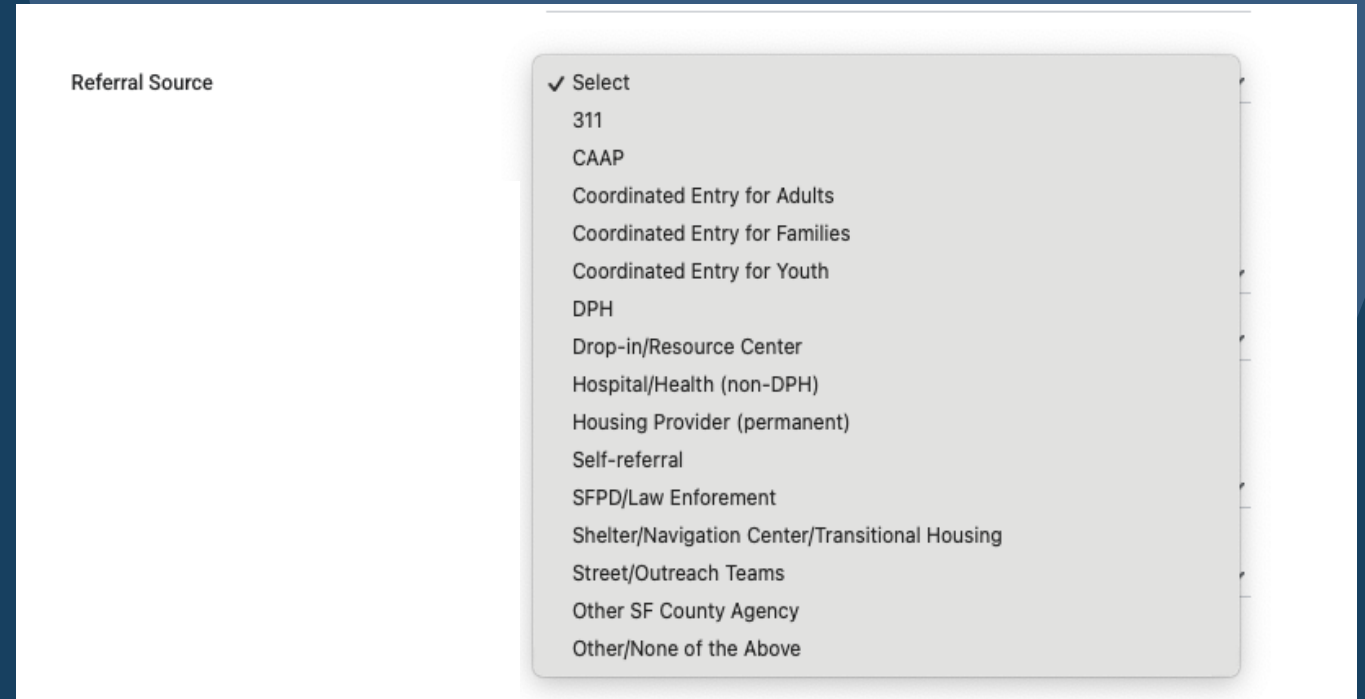
Select

▼

 Bitfocus

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.



The screenshot shows a web form with a label 'Referral Source' and a dropdown menu. The dropdown menu is open, displaying a list of options. The first option, 'Select', is highlighted with a checkmark. The other options are listed below it.

Referral Source

- ✓ Select
- 311
- CAAP
- Coordinated Entry for Adults
- Coordinated Entry for Families
- Coordinated Entry for Youth
- DPH
- Drop-in/Resource Center
- Hospital/Health (non-DPH)
- Housing Provider (permanent)
- Self-referral
- SFPD/Law Enforcement
- Shelter/Navigation Center/Transitional Housing
- Street/Outreach Teams
- Other SF County Agency
- Other/None of the Above

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

PROFILEHISTORYSERVICESPROGRAMSASSESSMENTSNOTESFILESREFERRALSCONTACTLOCATION

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
<div><div></div><div>Problem Solving Relocation and Reunification Street Outreach TRAIN - Glide Foundation ⓘ</div></div>	01/07/2026	Active	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.

PROGRAM: PROBLEM SOLVING RELOCATION AND REUNIFICATION

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

Coordinated Entry Events

Problem Solving/Diversion/Rapid Resolution intervention or service ▼

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

The screenshot shows the Bitfocus web application interface. At the top, a navigation bar contains tabs: Enrollment, History, Provide Services, Events (highlighted with a red box), Assessments, Notes, Files, Forms, and X Exit. Below the navigation bar, the page title is "Coordinated Entry Events". The main content area is a form for submitting an event. It starts with a dropdown menu showing "Problem Solving/Diversion/Rapid Resolution intervention or service". Below this, another dropdown shows "Problem Solving Travel and Relocation Support: Referral to substance use treatment or sobering center". The form includes fields for "Date" (set to 01/07/2026 with a calendar icon), "Result: Client housed/re-housed in a safe alternative" (a dropdown menu set to "Select"), and "Event Note:" (a large text area with formatting icons: B, I, L, and a list icon). At the bottom right of the form, a "SUBMIT" button is highlighted with a red box.

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 ▼
Travel and Relocation Waivers	Financial ▼

Problem Solving Financial Assistance: Travel and relocation support

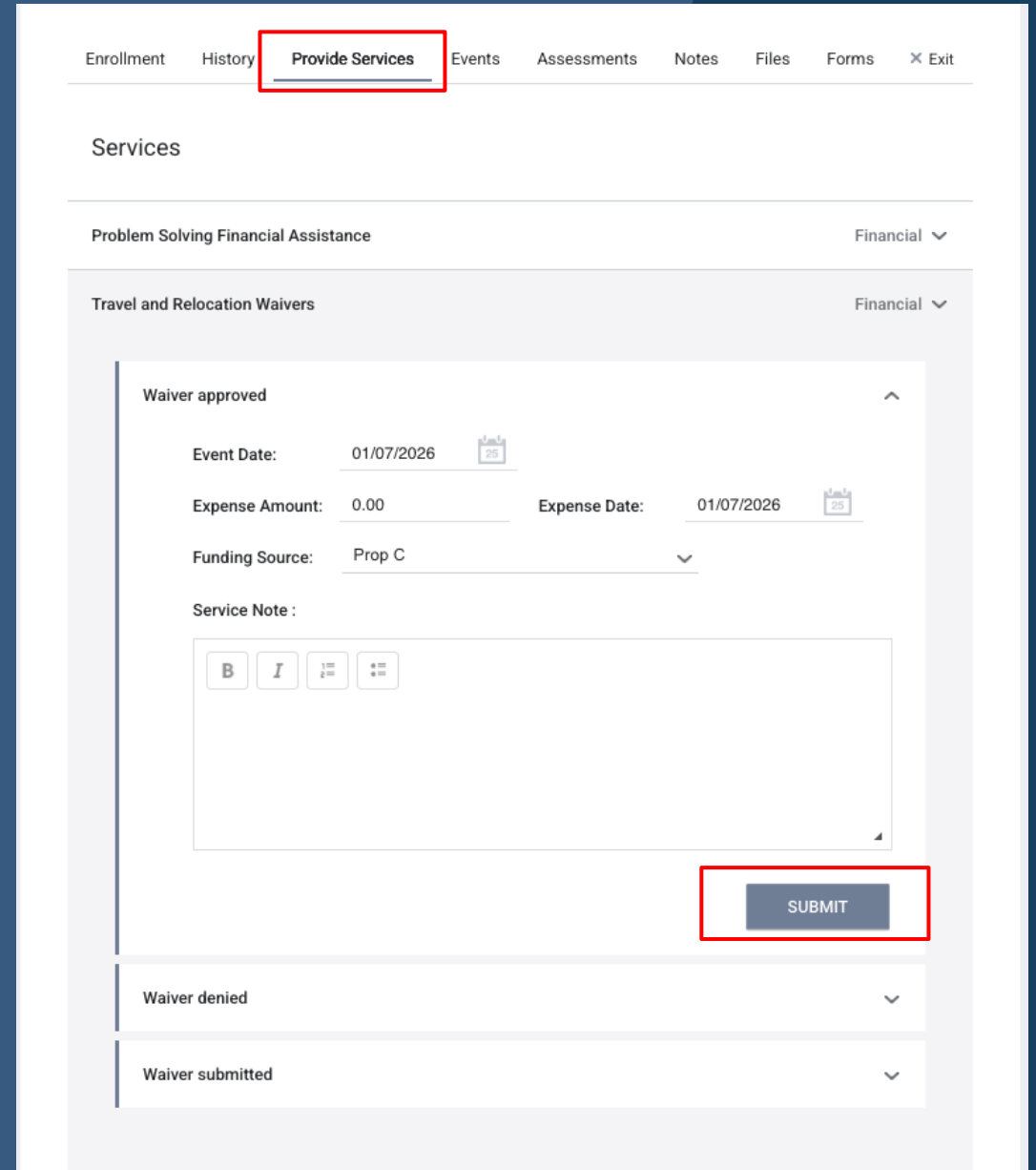
Travel and relocation support outside of San Francisco that will result in a housing connection - airline, train or bus ticket	▼
Travel and relocation support outside of San Francisco that will result in a housing connection- food stipend	▼
Travel and relocation support outside of San Francisco that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

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 

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

Funding Source: Prop C ▾

Service Note :

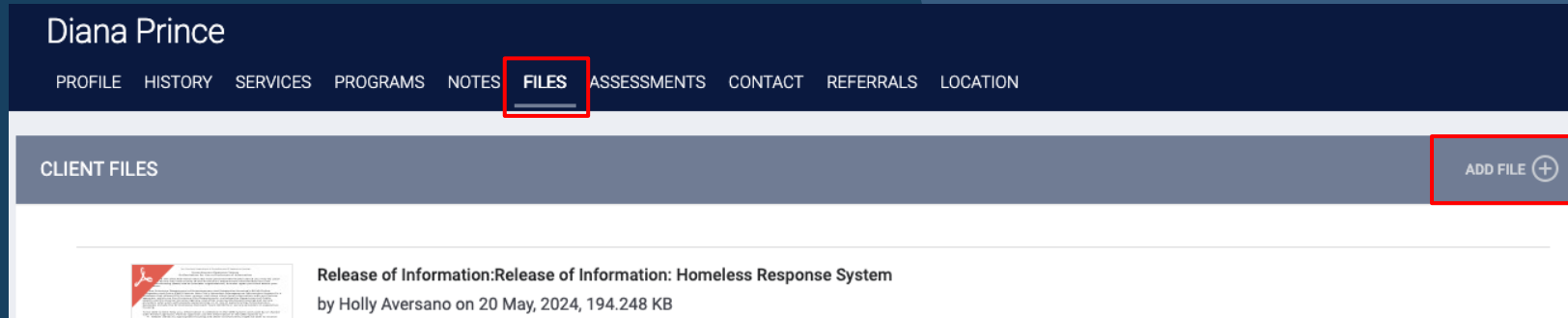
SUBMIT

Waiver denied ▾

Waiver submitted ▾

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**

The screenshot shows the 'UPLOAD A FILE' form. The navigation bar at the top includes links for PROFILE, HISTORY, SERVICES, PROGRAMS, NOTES, FILES (highlighted with a red box), ASSESSMENTS, CONTACT, REFERRALS, and LOCATION. The form has the following fields and controls:

- Category:** A dropdown menu with 'Problem Solving' selected.
- Predefined Name:** A dropdown menu with 'Travel and Relocation Support Waiver Request' selected.
- File:** A button labeled 'Select File'.
- Private:** A toggle switch that is currently turned off.
- Buttons:** 'ADD RECORD' and 'CANCEL' buttons at the bottom right.

Below the 'File' button, there is a link: 'Trouble attaching files? Switch to the Basic Uploader'.

PS Relocation and Reunification Files

Samuel Test

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES REFERRALS CONTACT LOCATION

UPLOAD A FILE

Category Problem Solving

Predefined Name

File

Private

Managed with Clarity Human Services

- ✓ 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

---> Two “Predefined Name” under the Problem Solving file Category particular to PS Relocation and Reunification program:

---> Relocation and Reunification Documentation

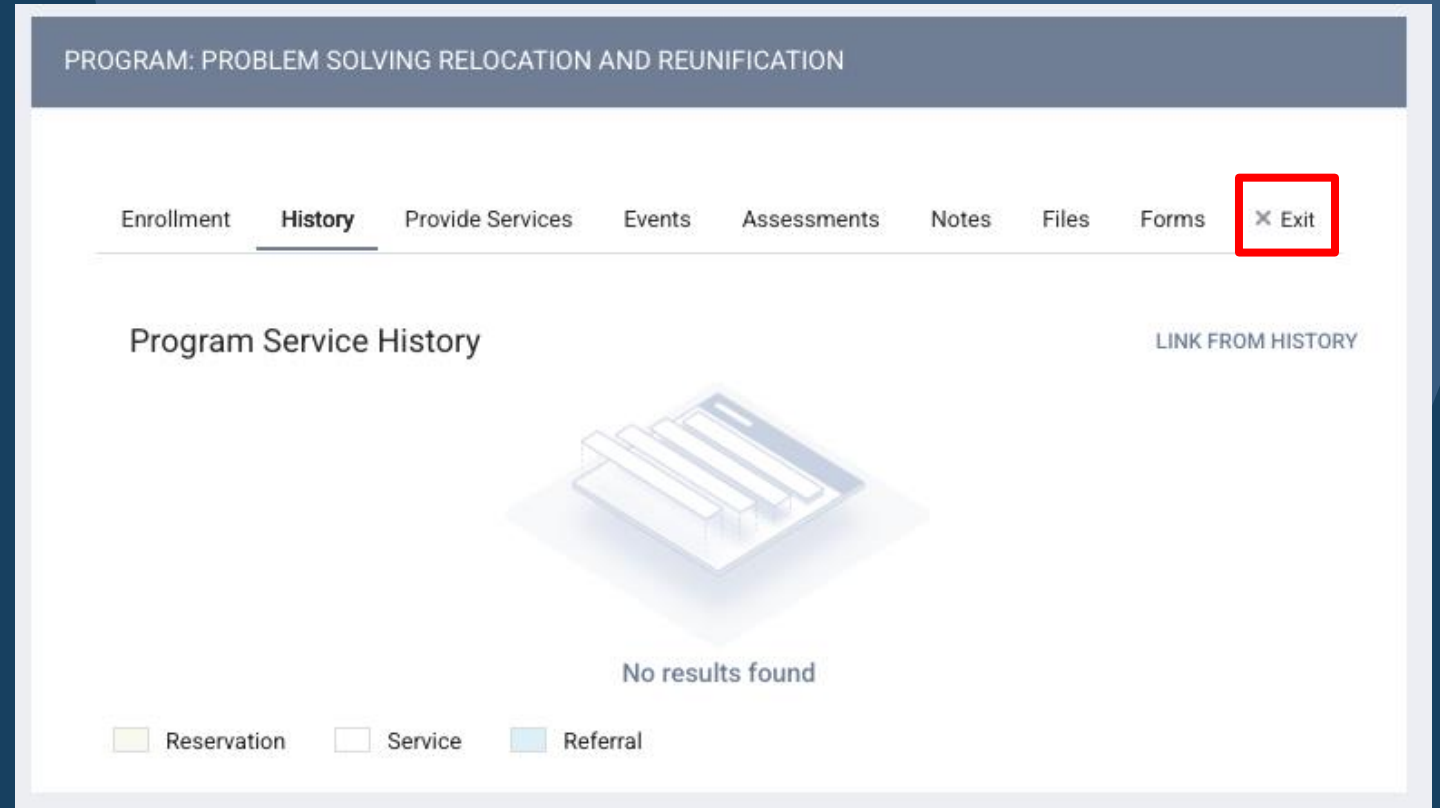
---> Travel and Relocation Support Waiver Request

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**


Program Service History [LINK FROM HISTORY](#)

No results found

☐ Reservation ☐ Service ☐ Referral

[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

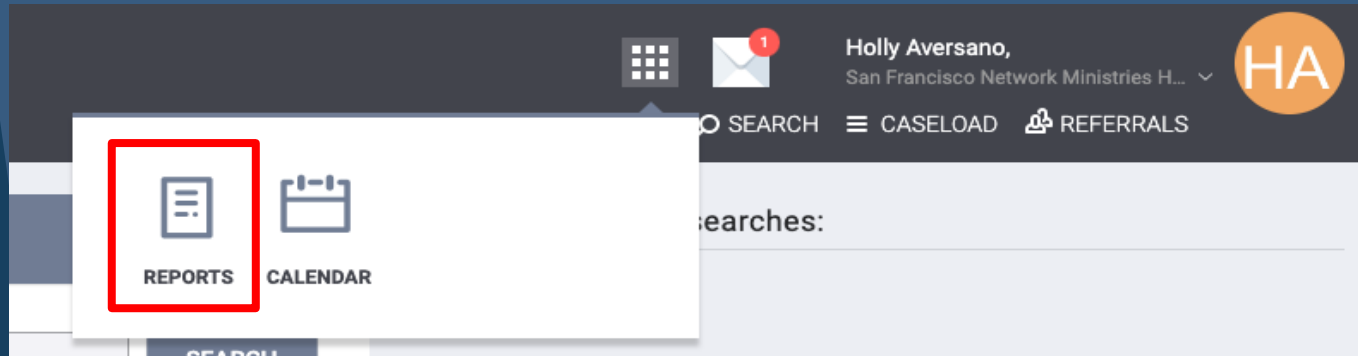
Physical Disability	No	▼
Developmental Disability	No	▼
Chronic Health Condition	No	▼
HIV - AIDS	No	▼
Mental Health Disorder	No	▼
Substance Use Disorder	No	▼

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



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

REPORT LIBRARY	
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) ▼

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

Bitfocus Resources

ONE System Help Site:

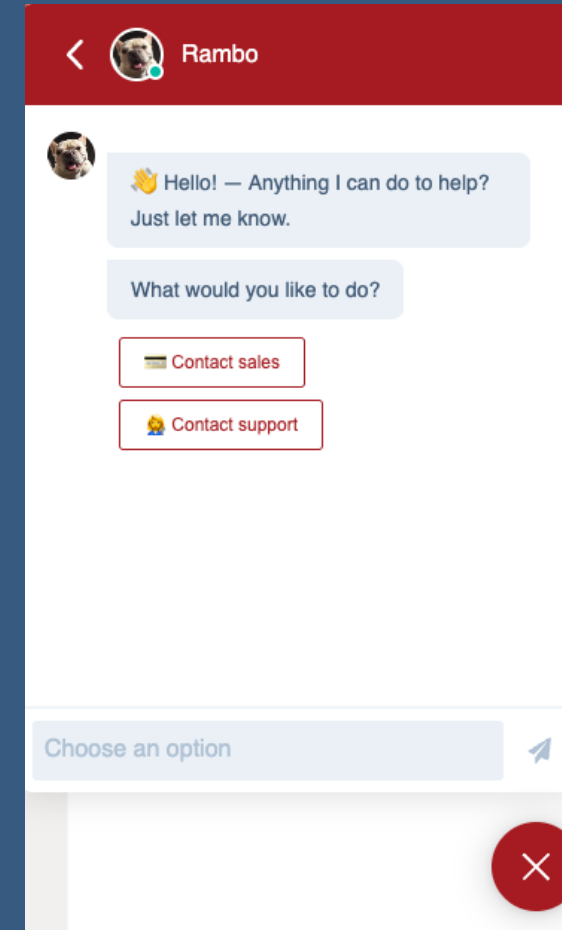
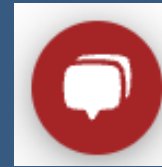
---> onesf.bitfocus.com

Bitfocus Help Desk

---> onesf@bitfocus.com

---> 415.429.4211

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



Questions?