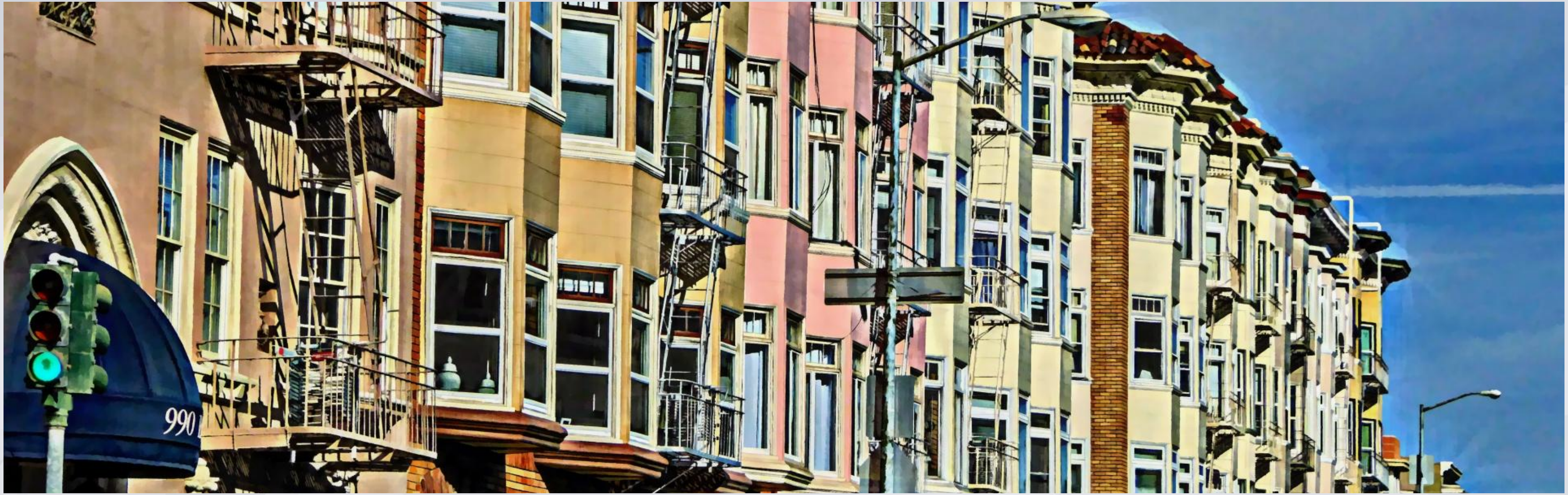

Homeless Prevention Program Training

Objectives

- Search and Create Clients in the ONE system
- Review Clients History
- Document Services

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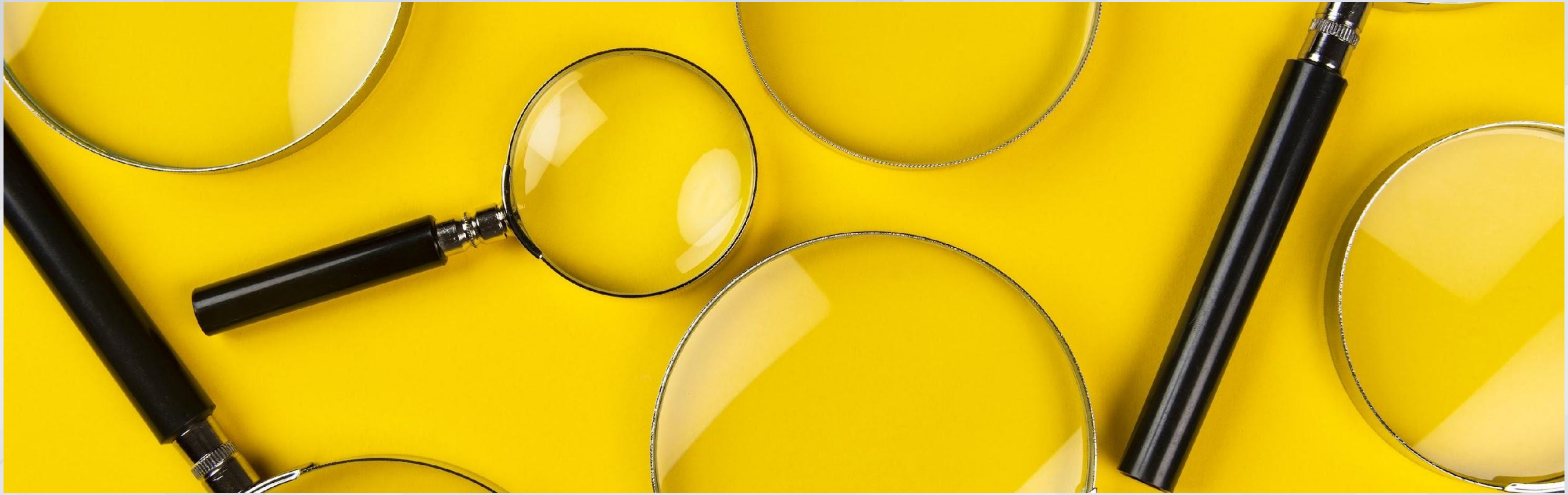

Searching Clients in the ONE System

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Creating New Profiles - Searching for Clients in ONE

Creating New Client Profiles

Creating New Profiles

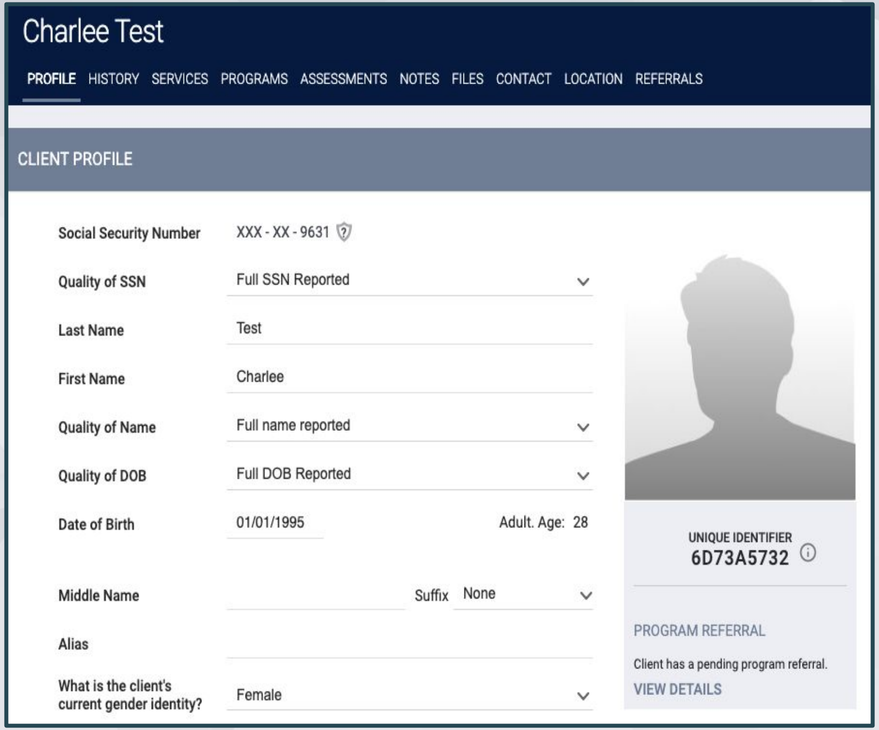
Please make sure to collect as much information as possible

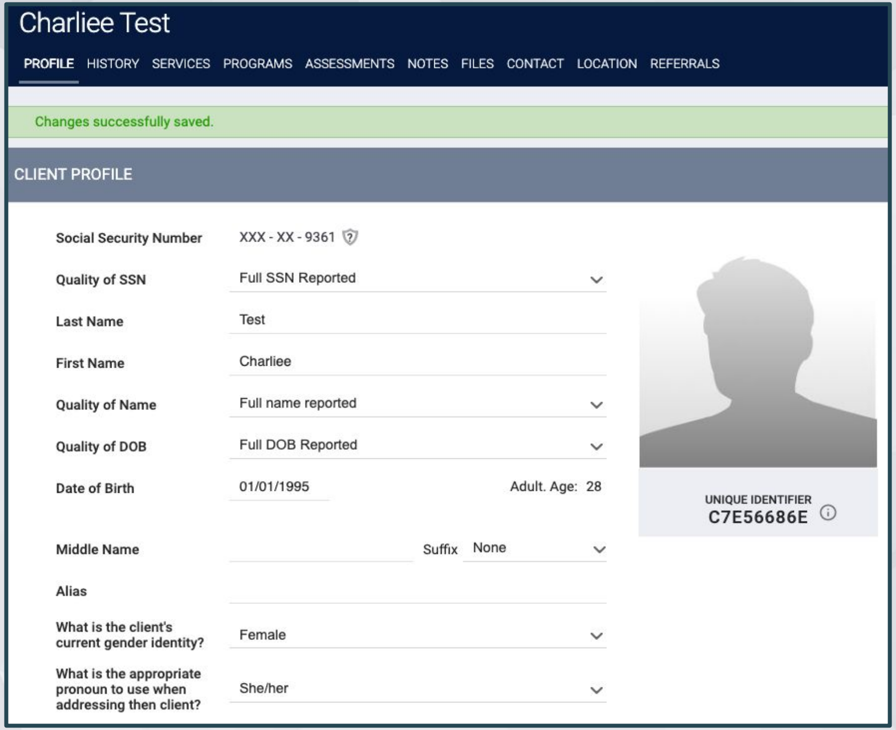
Avoid using:

- Client refused
- Client Doesn’t Know
- Data Not Collected
- Approximate or Partial

For existing profiles, confirm that all information is correct.

Duplicate Clients





Contact Bitfocus Help Desk to Merge Profiles
Bitfocus Help Desk: onesf@bitfocus.com
Only include the client's Unique Identifier (UID) when emailing about clients.

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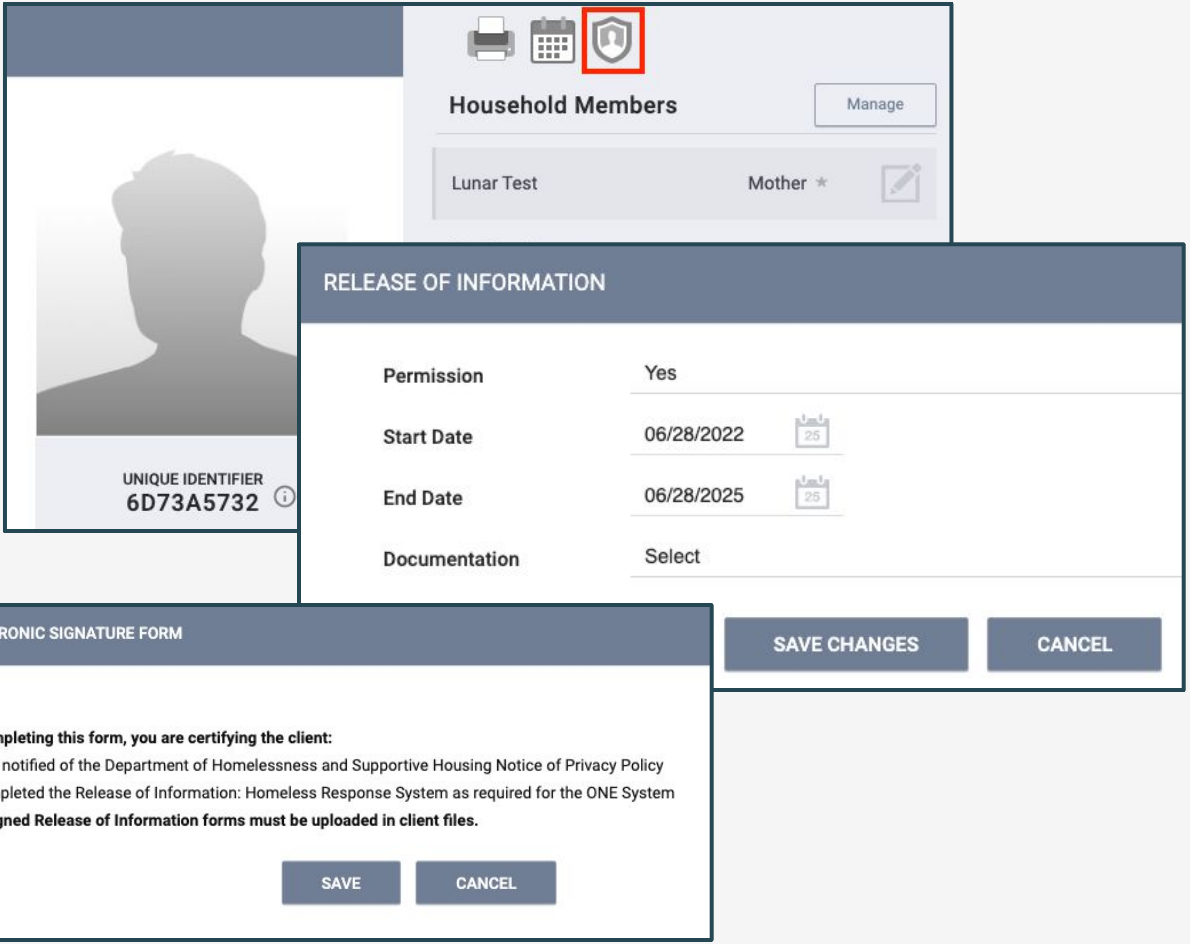
Release of Information

Release of Information

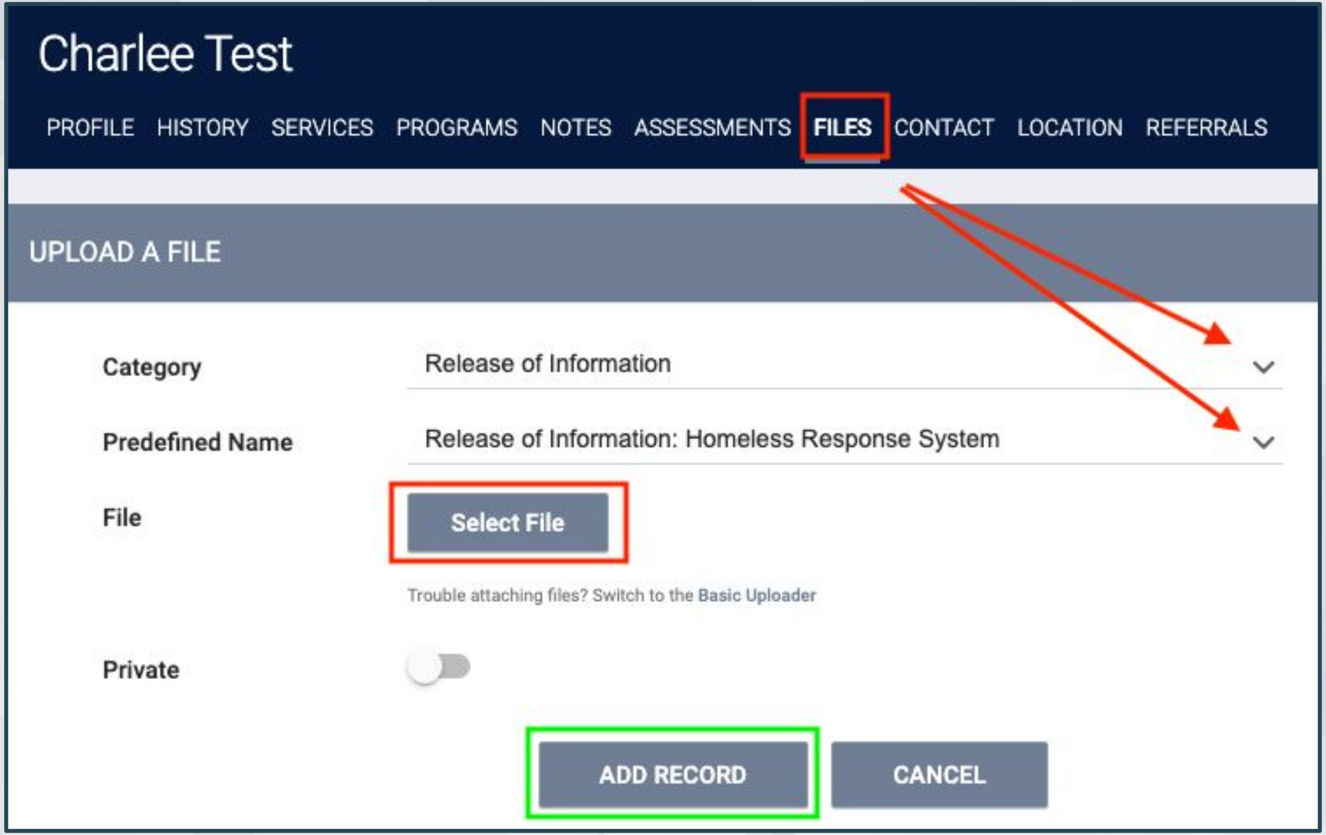
When creating a new client profile, ONE will prompt you to have the client sign a Release of Information or give verbal consent.

- The Release of Information entered date should correspond with both the date that the client signed the release and the date you created the client profile.
- In the next slide, we will demonstrate where you can upload the corresponding release of information



Uploading an ROI

- Select the files tab on the client profile to upload an ROI.
- Select the category for Release of Information
- Next, use the “Select File” button to upload the document.
- Once the document has been uploaded, click “Add Record”



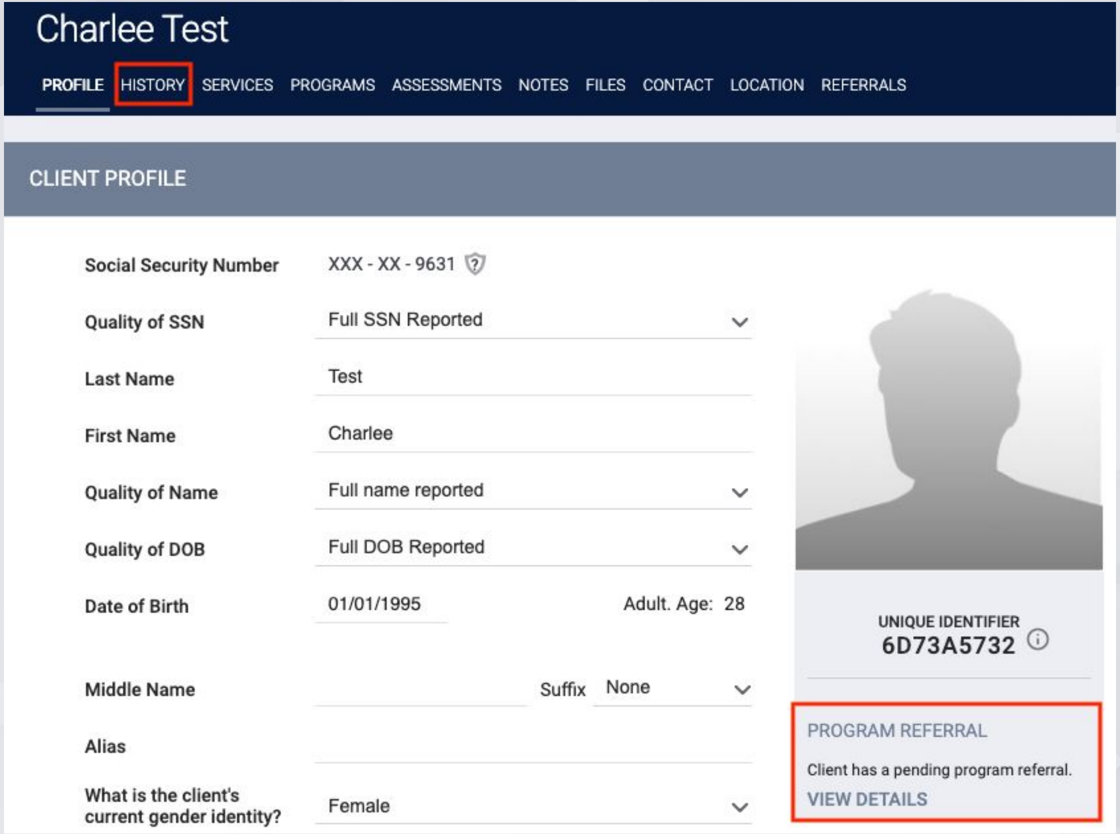
Client History

Client History

Client information and history can be found throughout the ONE System.

A client's active referrals can be found under the client's Unique Identifier.

You can also find a client's usage of programs, resources, and services by selecting the "History" tab at the client level.

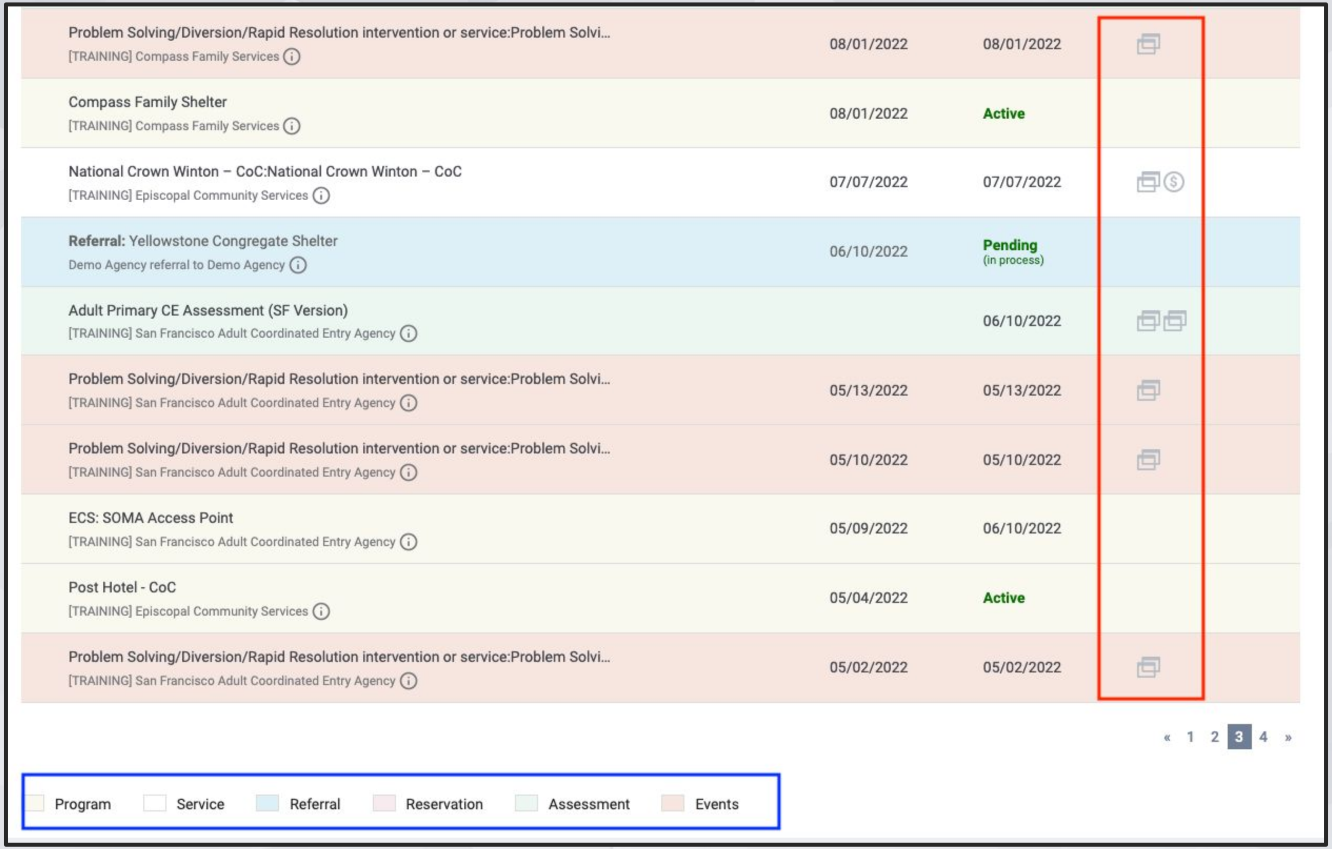


Client History

When selecting the "History" tab at the client level, the client's history will show in chronological order of newest to oldest.

The history is color-coded by type which can be referenced at the bottom of the screen on the "History" tab.

You will also notice icons next to certain items.

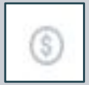
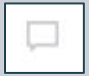


Client History

Item	Type and Color
Clarity Connect PSH Program System	Program: tan
Case management:Case management System	Service Items: white
VI-SPDAT Prescreen for Single Adults [V2] System	Assessments: green
Reservation: Reservation:Reservation System	Reservations: pink
Referral: Community Queue System referral to Community Queue	Referrals: blue
Referral to a Housing Stability Voucher:Referral to a Housing Stability Voucher Help Center Agency	Coordinated Entry Events: peach

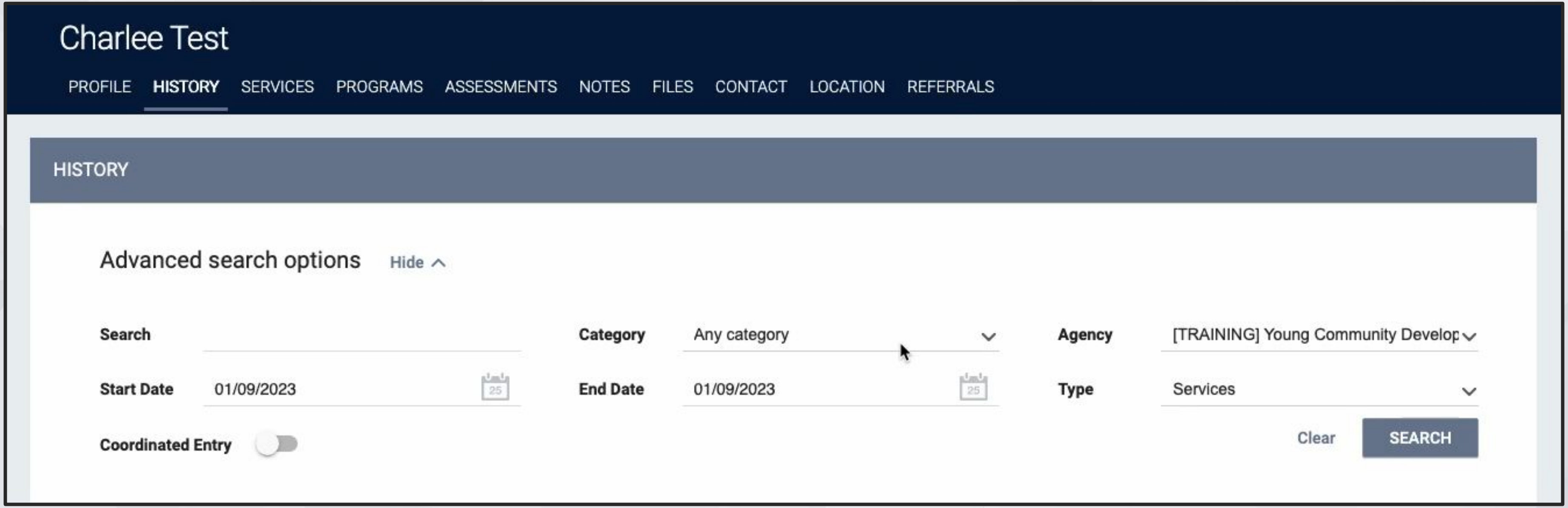
Client History

By hovering over each icon, you will be able to view additional information related to the item:

Icon	Description
	Service items with attached expenses
	Services, Assessments, and Reservations linked to an enrollment Coordinated Entry Events (Inferred or Manual)
	A note is associated with the service item or referral.
	The program enrollment was the result of a referral.
	Click this icon to delete the historical item.
	Click this icon to view and edit the details of a historical item.
	Click this icon to view (but not edit) the details of a historical item.

Client History

You can also customize your search by using the different fields under the History tab.



Client Files

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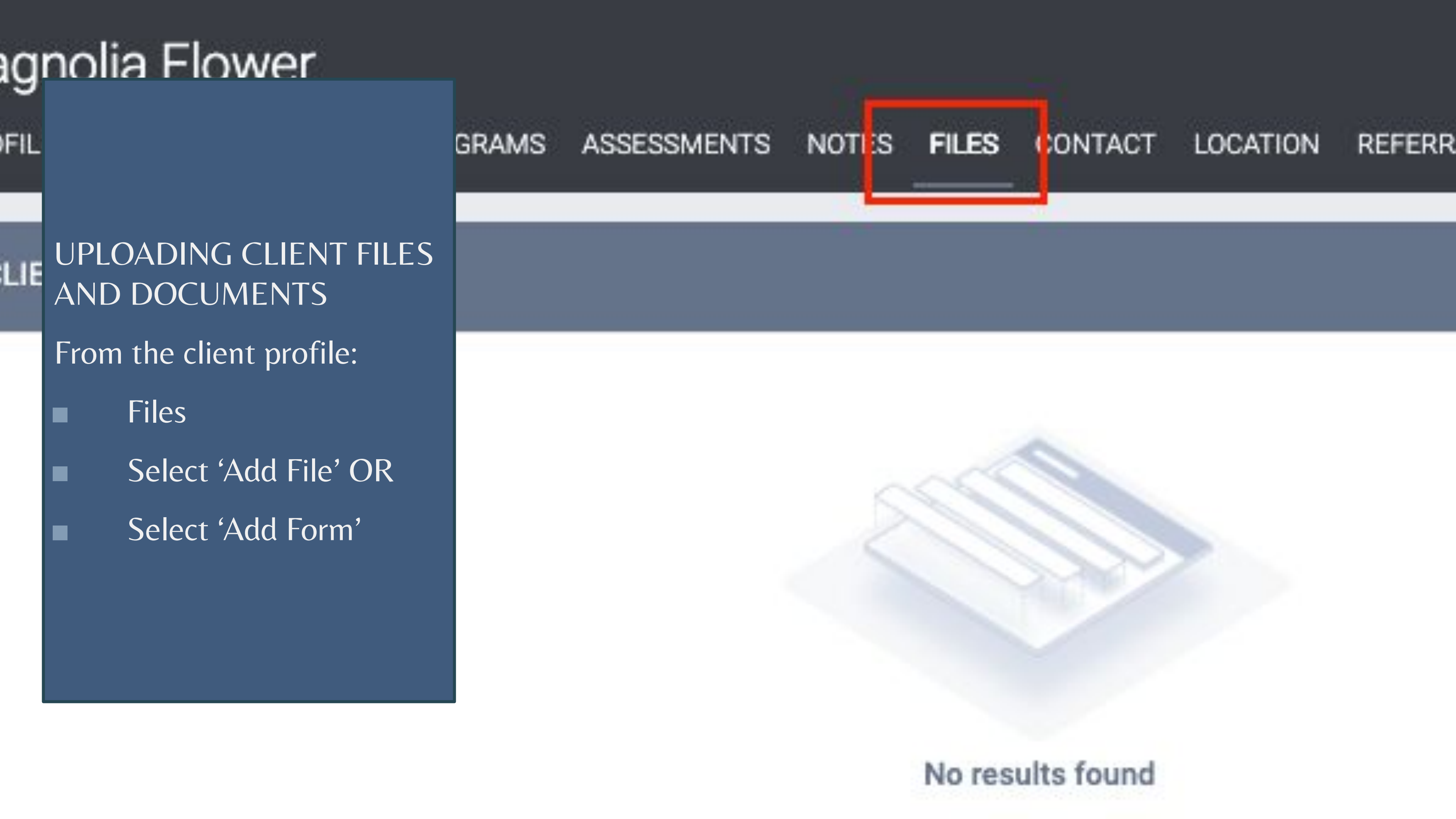
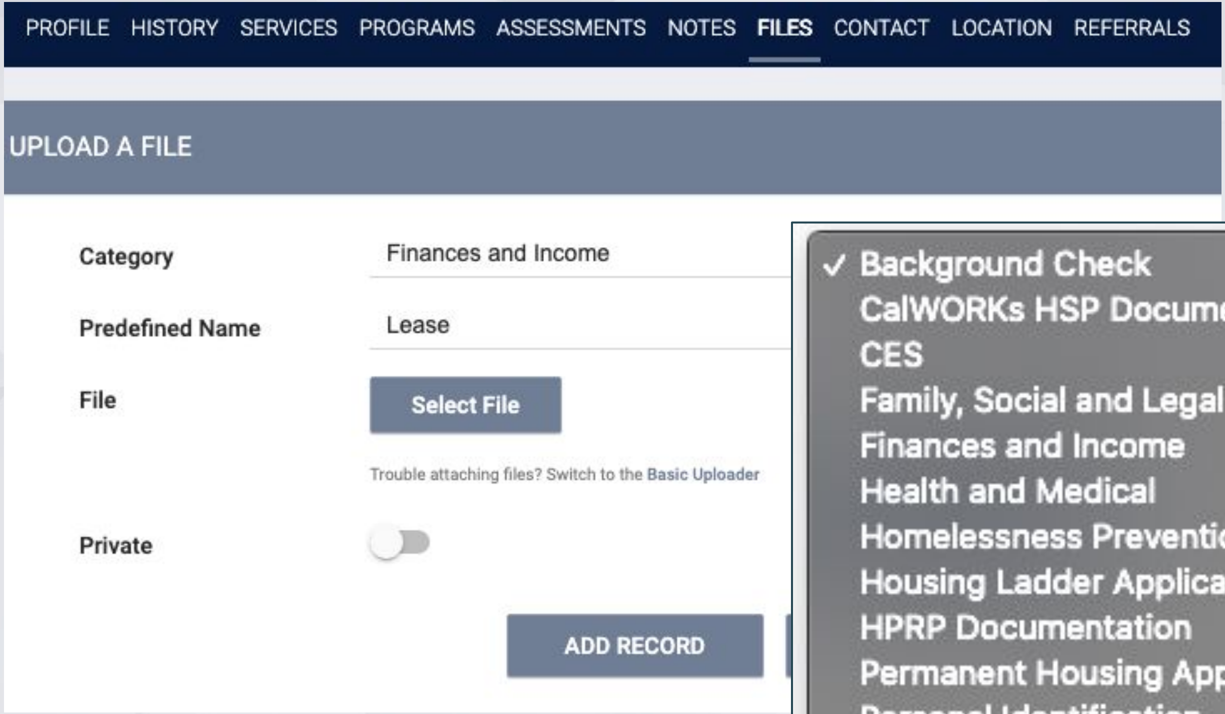


UPLOADING CLIENT FILES AND DOCUMENTS

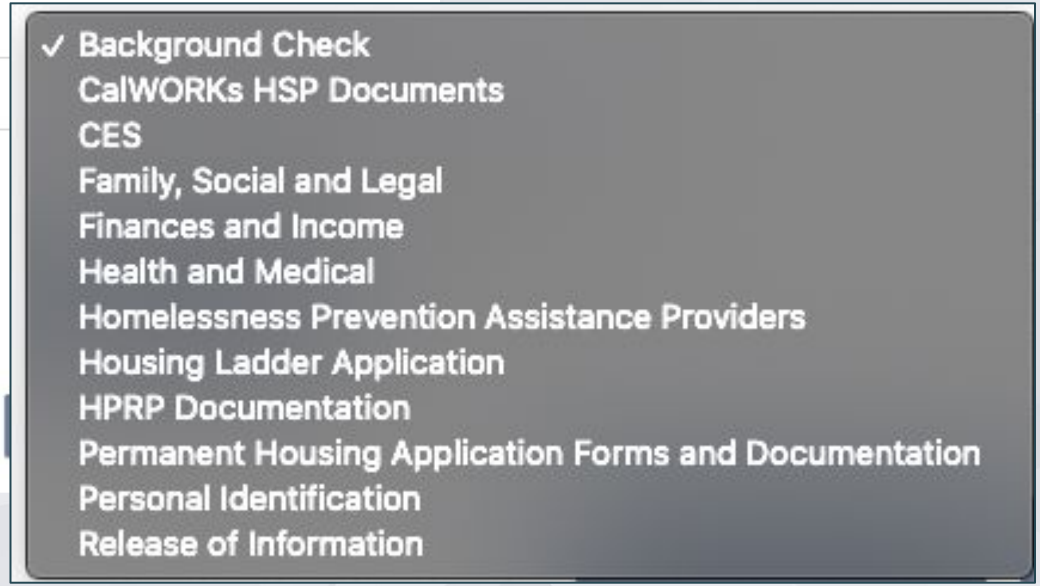
From the client profile:

- Files
- Select ‘Add File’ OR
- Select ‘Add Form’

Uploading Files and Documents



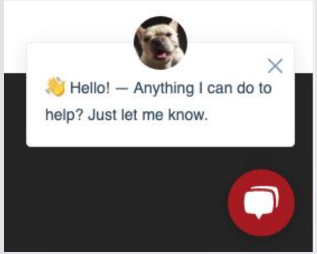
FILE TYPE CATEGORIES



ONE System Support:

ONE System Support Site:
onesf.bitfocus.com

Bitfocus Help Desk:
onesf@bitfocus.com
Ph: 415.429-4211
Chat Icon:



Community Administration
onesf-admin@bitfocus.com

And for specific help go to: The Prevention Pages within SF ONE Help

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