DEPARTMENT OF
HOMELESSNESS AND
SUPPORTIVE HOUSING

Site-Based Housing in ONE

Updated May 2025

Brief Overview of ONE Setup

Every group must follow their workflow in a timely manner for the system to work.

Remember: data isn’t just about numbers, it’s about people.

- Coordinated Entry
- Property Management
- Support Services

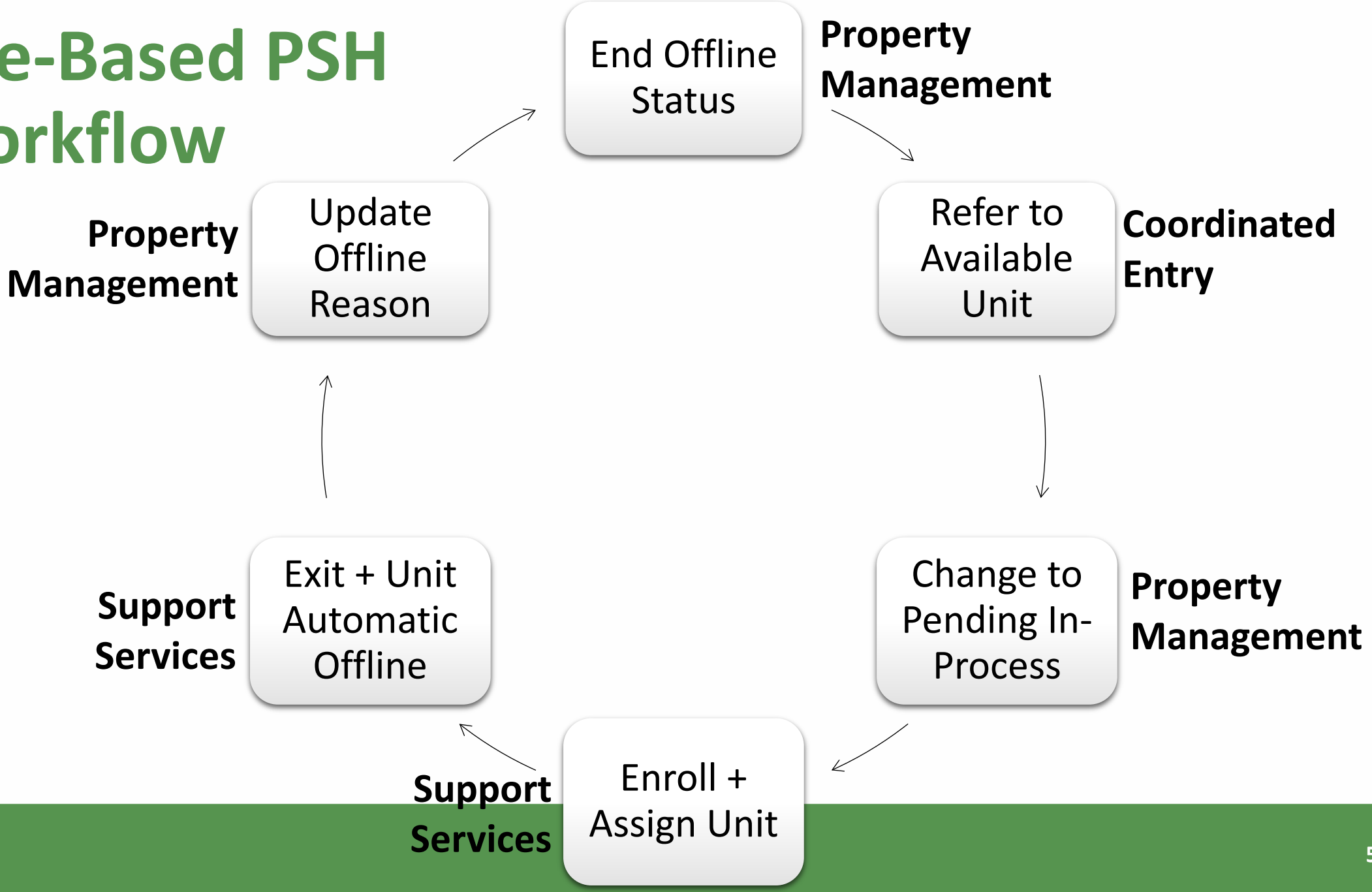
What am I responsible for?

- Support Services
  - Program enrollments and ensuring correct unit assignment **at move-in**
  - Annual assessments
  - Program exits
  - Tracking eviction notices and unlawful detainers served
  - Ensuring program rosters are up to date and include all clients in your program
  - Maintaining Releases of Information
- Property Management
  - Making units offline and ending offline status when unit becomes available
  - Ensuring clients are correctly associated with their current unit
  - Regularly monitoring your building rosters to ensure accurate occupancy and availability

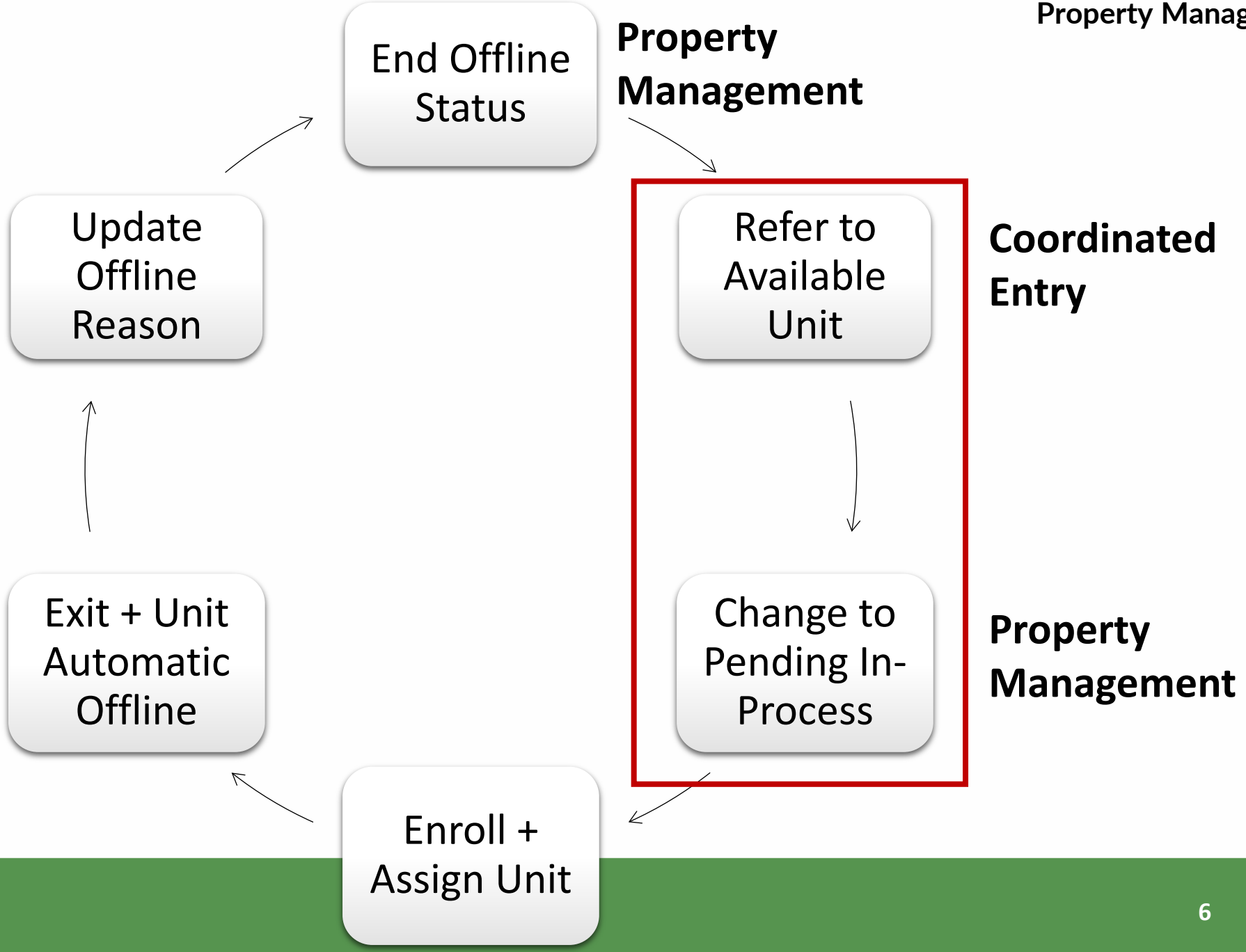
DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING

Housing Workflow

Site-Based PSH Workflow

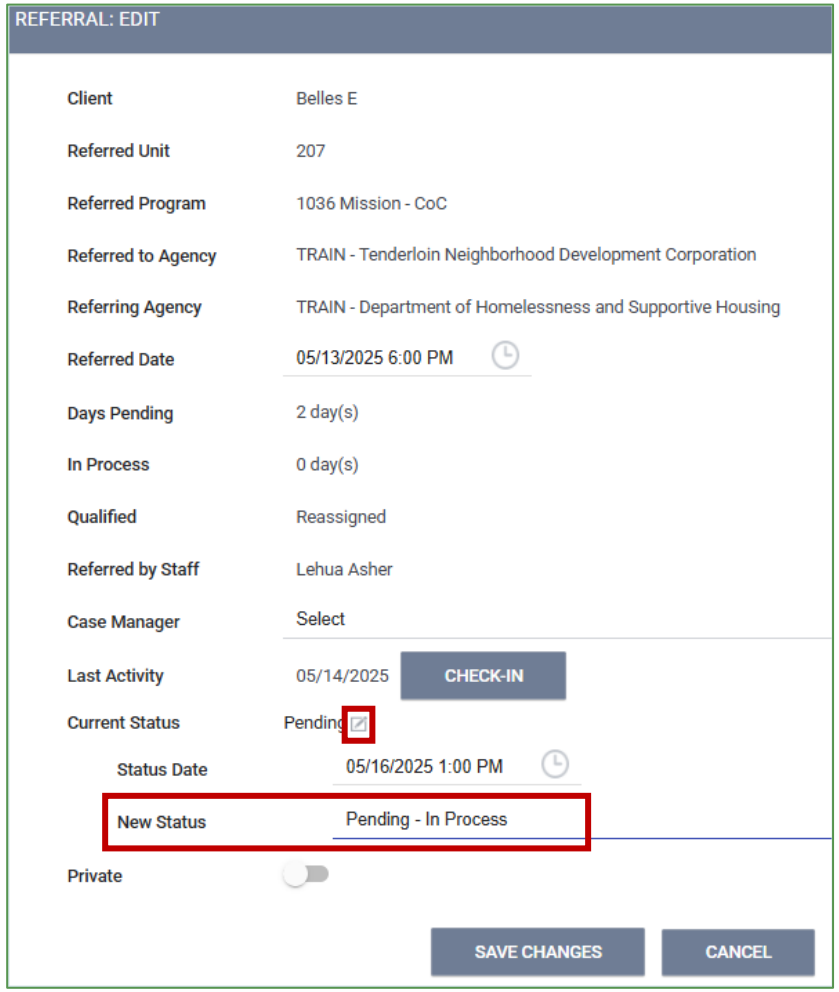


Referral


End Offline Status
Property Management
Refer to Available Unit
Coordinated Entry
Change to Pending In-Process
Property Management
Enroll + Assign Unit
Exit + Unit Automatic Offline
Update Offline Reason

Referral Status: Pending In-Process

- Change the referral status under the **Pending Tab** to **Pending In-Process** within 2 days of receiving referral
- Referral color will change to green
- This notifies the staff who made the referral that it has been received



Referral Status: Denied

- If a client refuses housing or is deemed ineligible:
  - Send client back to the **Community Queue**
  - Select denial type and reason
  - Provide additional details

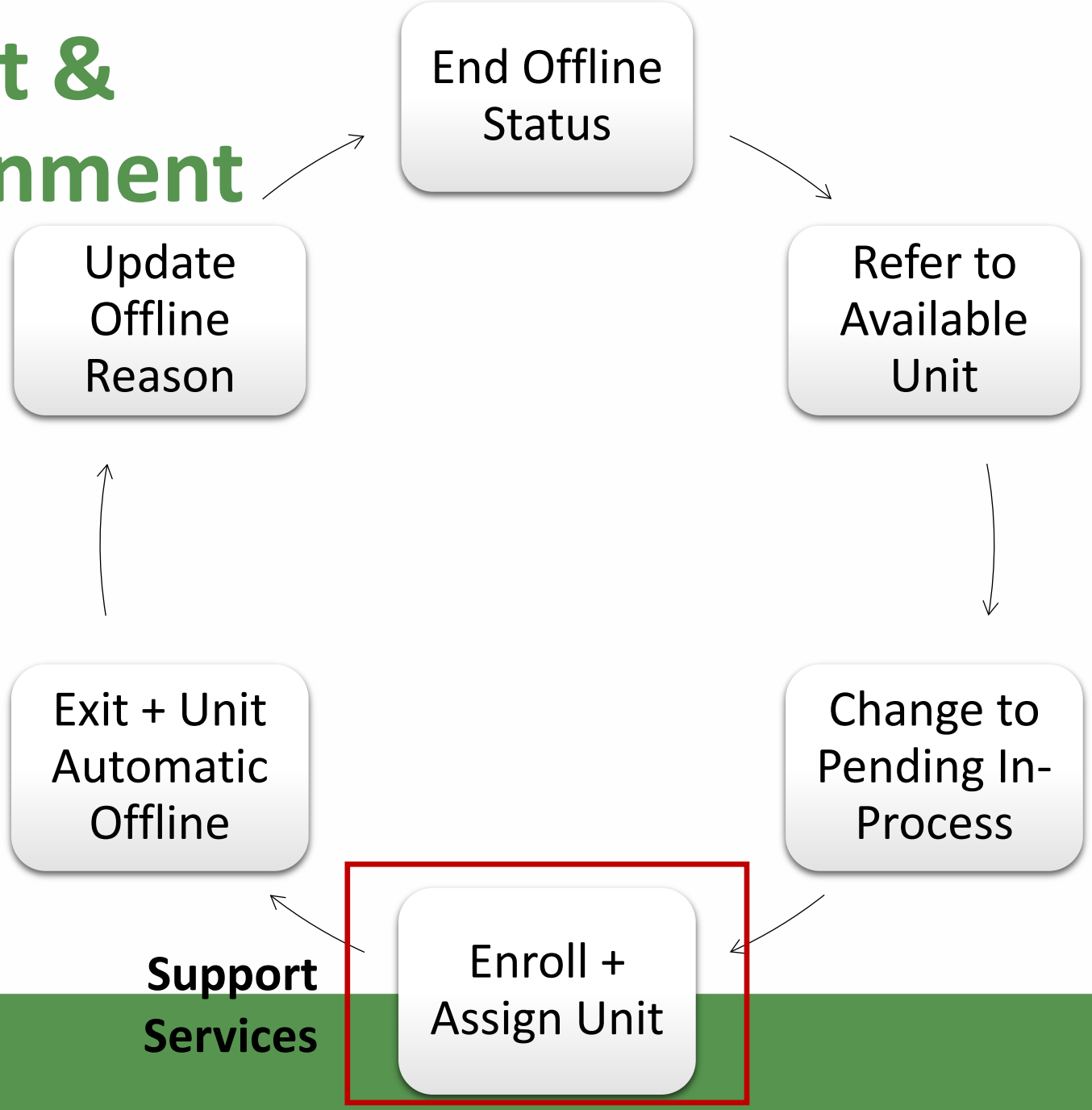
Status	Denied
Send to Community Queue	Yes
Denied By Type	Provider
Denied Reason	Lack of Eligibility
Denial Information	The client is over income

Unit Status/Availability

- Status and availability indicate a unit's usage and occupancy
- Status may be changed at any time
- Do not use Inactive status – discuss with HSH program manager

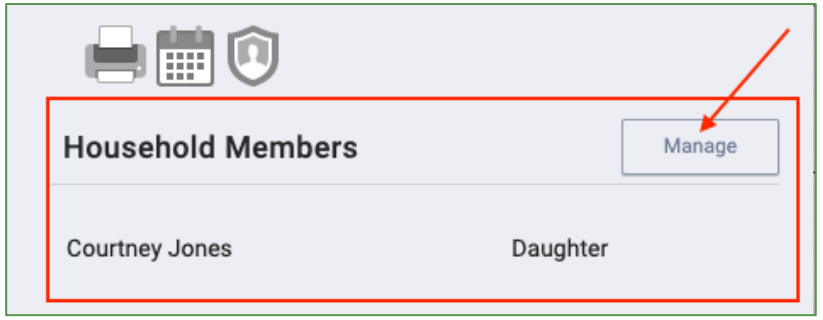
Status	Availability	Description
Active	Available	Unit is available to receive referral (move-in ready)
	Occupied	Client/household is assigned to the unit
	Pending Occupancy	Unit has a pending referral connected to it
Offline		Unit is temporarily unavailable (e.g., due to needed maintenance).
Inactive		Unit not available for referral for foreseeable future (e.g., used as an office). Please call or email the help desk if a unit was accidentally made inactive.

Enrollment & Unit Assignment



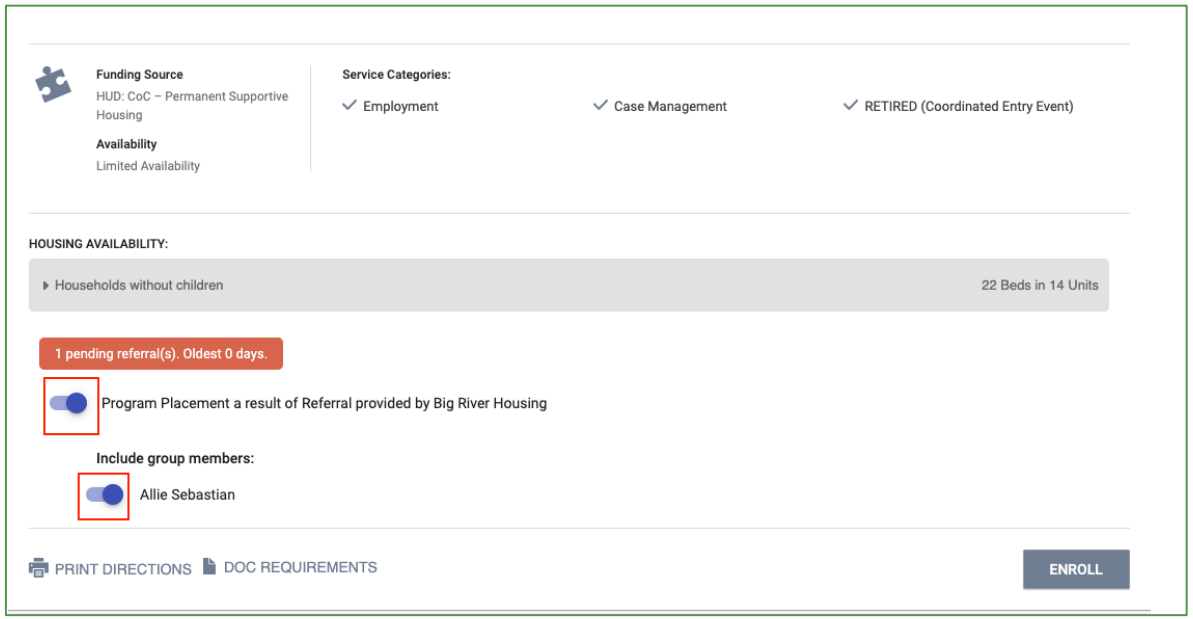
Manage Household Composition

- Confirm household composition from client profile page
- Click **Manage** to add or remove household members if needed



Program Enrollment

- Before enrolling make sure you see:
  - The orange pending referral box
  - “Program Placement a result of Referral...” toggle is on
  - Correct household members are listed



Do not start the enrollment unless all the above are correct

Program Enrollment Details

Enrollment | History | Provide Services | Events | Assessments | Notes | Files | Units/Beds | Forms | × Exit

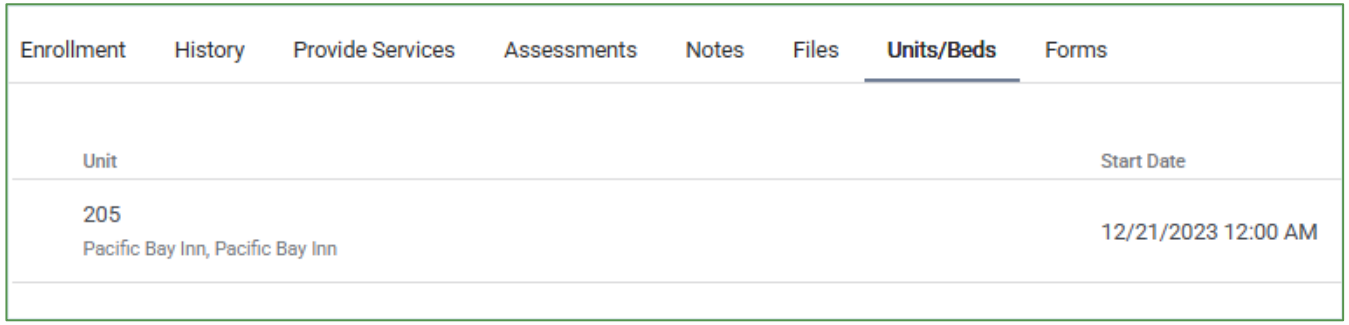
Enroll Program for client Sally Huffman

Project Start Date	12/21/2023
TRANSLATION ASSISTANCE NEEDED	
Translation Assistance Needed	No
COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT	
Housing Move-In Date	12/21/2023
PRIOR LIVING SITUATION	
Type of Residence	Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/tr
Length of Stay in Prior Living Situation	One week or more, but less than one month
Approximate date this episode of homelessness started	12/01/2023
Number of times on the streets, in ES, or Safe Haven in the past three years	One Time
Total number of months homeless on the streets, in ES, or Safe Haven in the past three years	One month (this time is the first month)

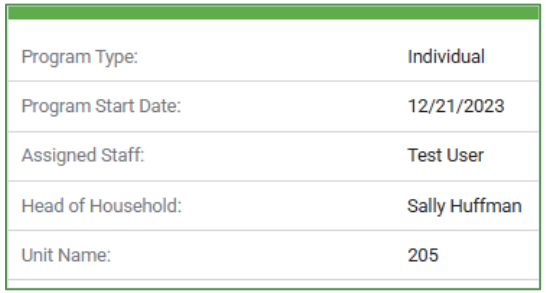
- **Housing Move-In Date** and **Project Start Date** should be the date the client moved in
- Complete as many fields as possible and update auto-populated fields (if necessary)
- **Pay special attention to the Prior Living Situation fields, which are used for key performance indicators**

Unit Assignment

- Unit assignment happens automatically when the referral is completed
- Unit Start Date should match Project Start Date and Housing Move-In Date



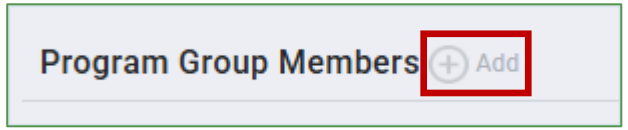
- Once the client is assigned to a unit, the unit number appears in the enrollment sidebar



- **If the unit number is not correct, the upcoming slides on transfers will cover how to correct this.**

Add a New Household Member to a Program Enrollment

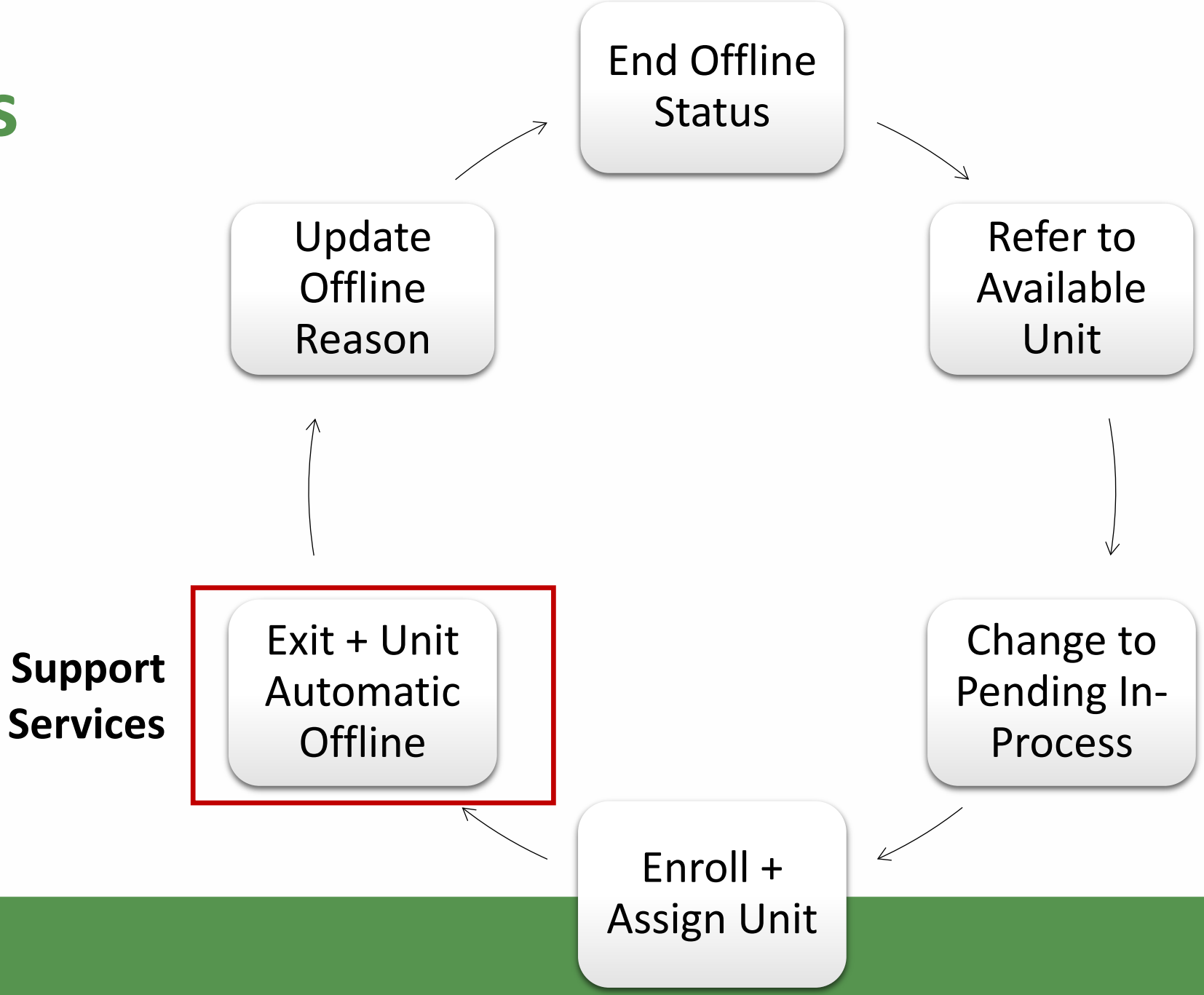
- To add an additional member to a program enrollment, the additional member must be added as a household member at the client's profile
- From the program enrollment click the Add button next to Program Group Members on the right-hand side of the screen



- Complete and save each household member's enrollment as prompted

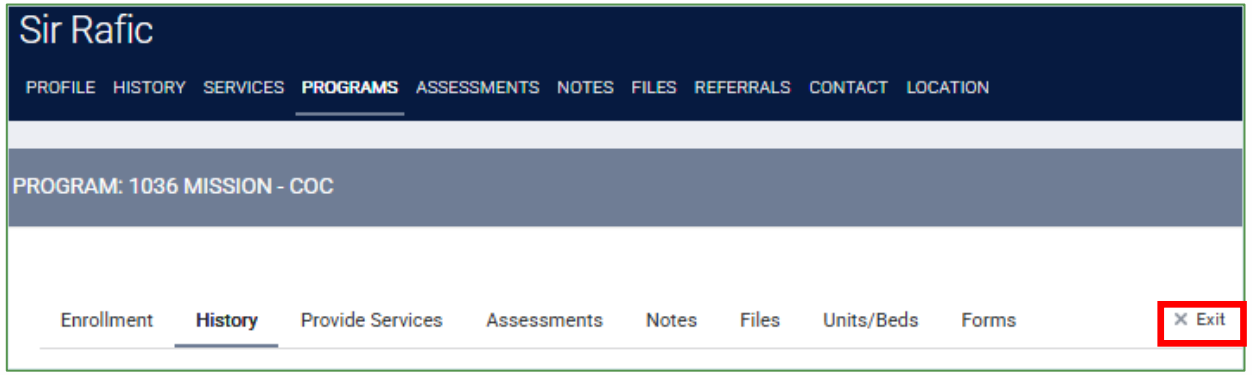
- **Be sure that the Head of Household is designated in the enrollment**

Exits

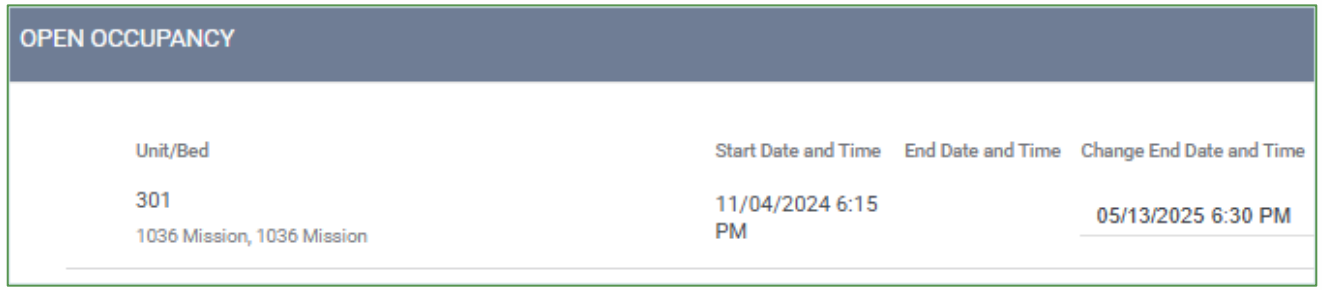

End Offline Status
Refer to Available Unit
Change to Pending In-Process
Enroll + Assign Unit
Exit + Unit Automatic Offline
Update Offline Reason
Support Services

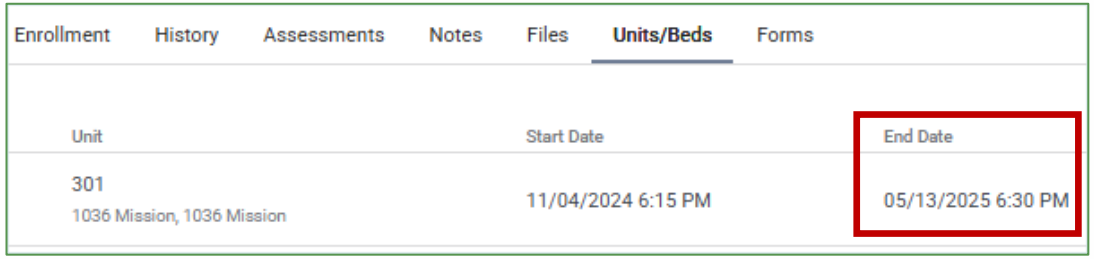
Exiting Client from Program

- Program exits should occur when a client is no longer receiving services



- Exiting a client from a program will automatically exit the client from their unit

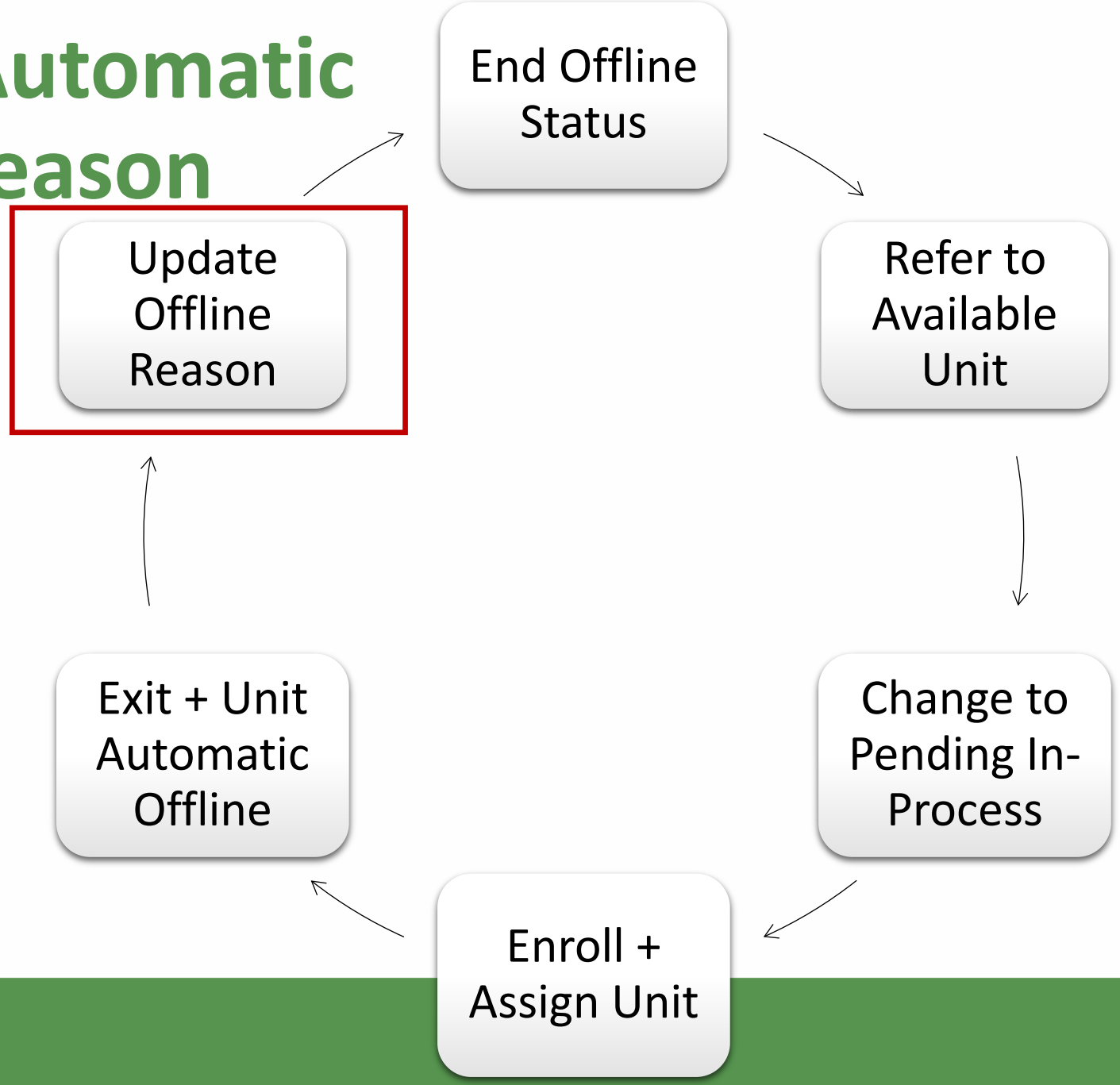




- Complete an exit for all household members

Update Automatic Offline Reason

Property Management



Offline Reasons

- Reasons are labeled with the program specifiers:
  - **HSG** (housing)
  - **SHLTR** (shelter)

- The toolkit includes a complete set of up-to-date definitions

Reason Name	Definitions	Time Offline
Automatically Set to Offline	The unit or bed was automatically set to offline with this reason by the system when the previous household was exited from the program. Update this status to the actual offline reason within three business days.	Maximum 3 business days
HSG – Building Rehab	Planned building rehab/construction: written notification and timeline submitted to HSH Program Manager prior to setting unit offline.	Varies
HSG – Coroner Hold	The unit is held pending a coroner or medical examiner review, or public administrator notification of next of kin.	30-90 days
HSG – Internal Transfer	The unit is held for an in-program transfer, such as a reasonable accommodation move or other transfer from another unit within the same provider's portfolio.	30 days
HSG – Occupied by Legacy Tenant	The unit is currently occupied by a legacy tenant who is not enrolled in the program in ONE.	Ongoing
HSG – Occupied but No Client ROI	The unit is currently occupied by a client refusing to sign an ROI, meaning they cannot be enrolled in the program in the ONE System.	Ongoing
HSG – Occupied Temporarily by Client from Other Program/Building	The unit is temporarily occupied by a client who is enrolled in another program or building, and therefore cannot be assigned to the client.	30-90 days
HSG – Significant Damage	Unit with significant damage due to fire, flood, or other significant incident.	90 days
HSG/SHLTR – Janitorial/Maintenance	The unit is unavailable for client placement due to janitorial or maintenance needs.	14-30 days
HSG/SHLTR – Property Hold	The unit is unavailable due to a property hold. This status can also be used for property management needs that are not covered by any other offline reason. Please include notes explaining the circumstance.	30 days
SHLTR – Hospital Hold	The unit or bed is held for a client who is temporarily at a health care facility. Not used for housing.	
SHLTR – Jail Hold	The unit or bed is held for a client who is temporarily incarcerated. Not used for housing.	

Offline Reasons for Occupied Units

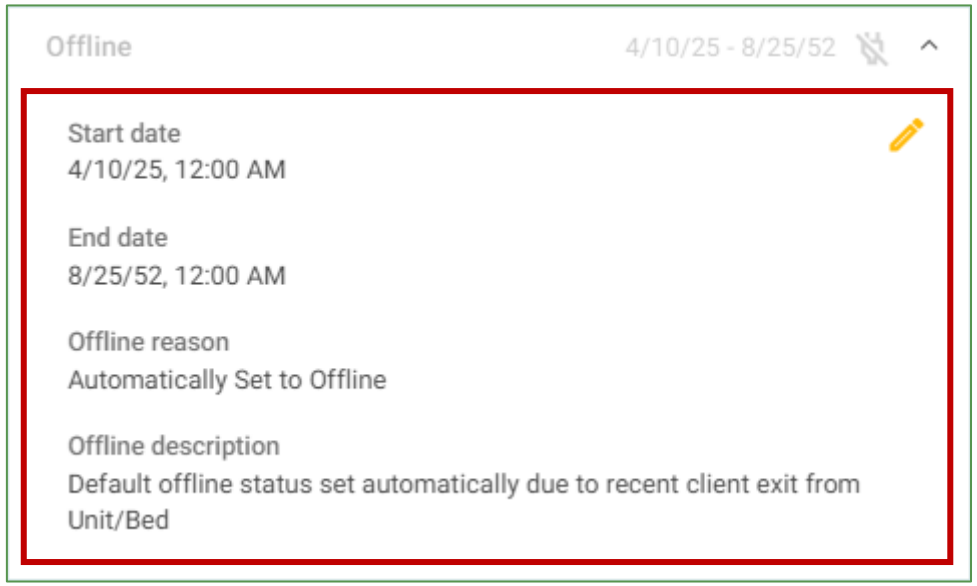
- Three Offline Reasons indicate a unit is occupied but the tenant is not enrolled in the program:
  - HSG - Occupied by Legacy Tenant
  - HSG - Occupied but No Client ROI
  - HSG - Occupied Temporarily by Client from Other Program/Building
- **Click to open the housing toolkit for more details**

Offline Status Updates

Situation	Action
Unit Automatically Set to Offline at Exit	Update offline reason & description
Offline Status is Extended (Offline Reason Doesn't Change)	Update offline description with additional details
New Offline Status	Add an offline status with reason
Offline Reason Changes	Add new offline status with new reason which will also end current offline status
Unit is No Longer Offline	End offline status

Updating Unit Automatically Set to Offline

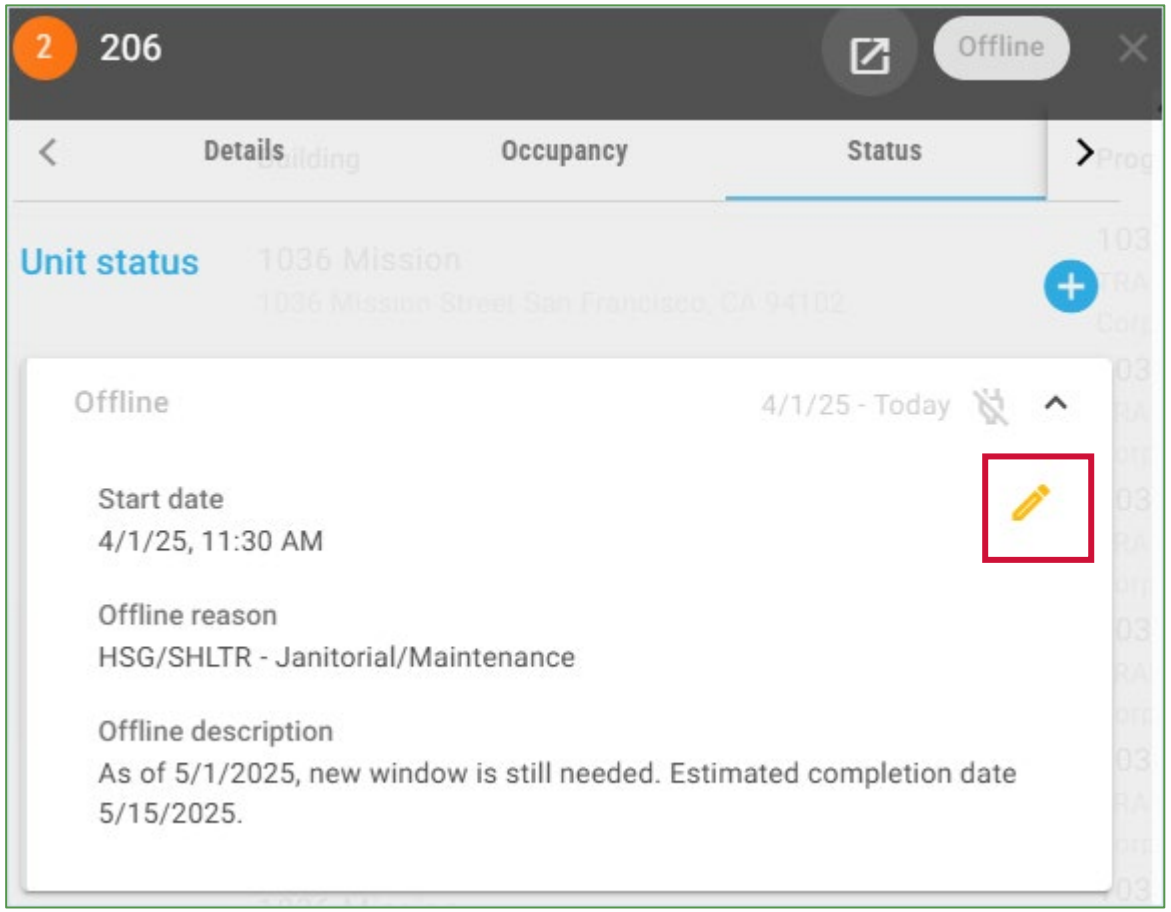
- The unit will automatically switch to offline when the unit assignment ends because of a program exit or unit transfer
- Update the **Offline reason** with the actual reason from the dropdown
- Delete **Offline description** and add any details



- **Always leave the end date blank**

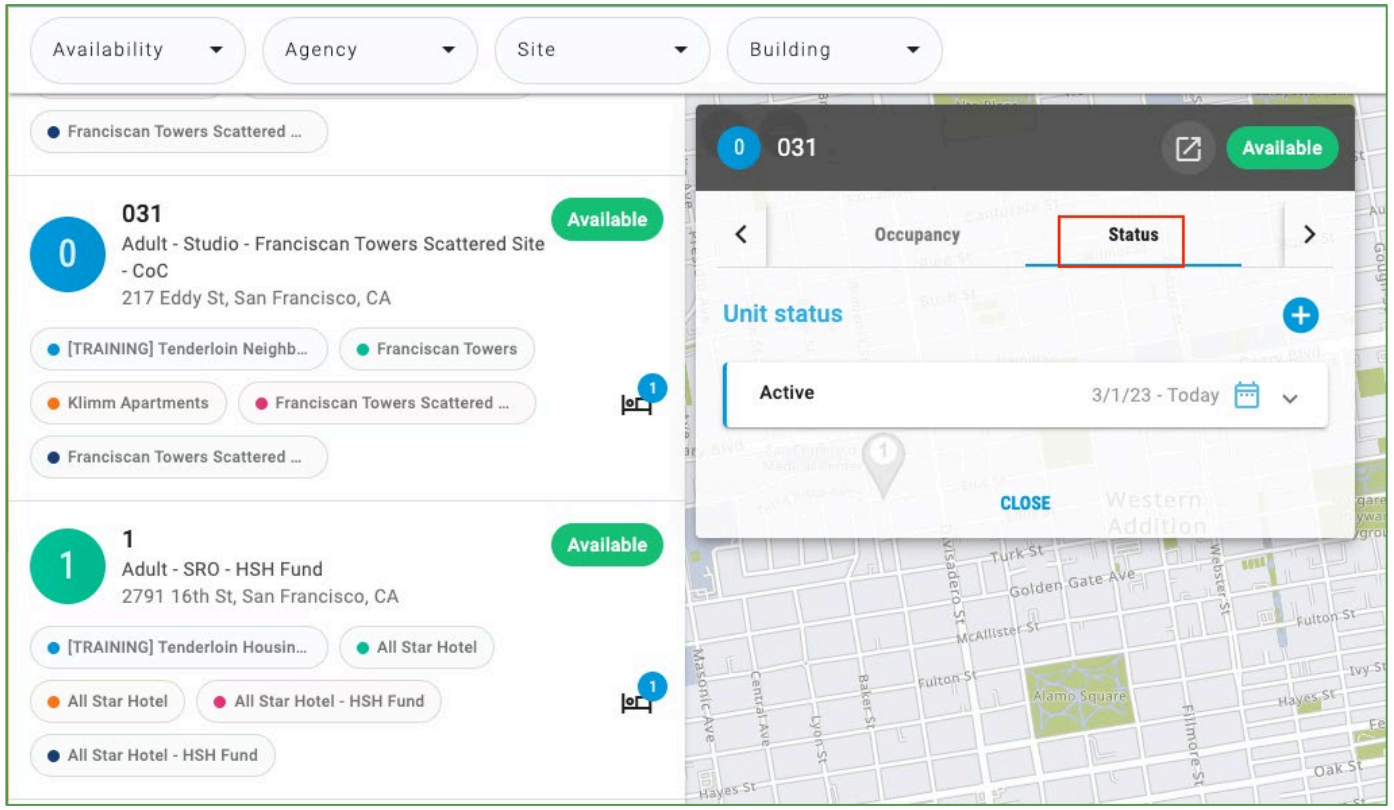
Extending Offline Status

- When a unit is offline for longer than expected, do not add a new status
- Click the pencil to edit and enter additional details in the **Offline description** field



Adding New Offline Status

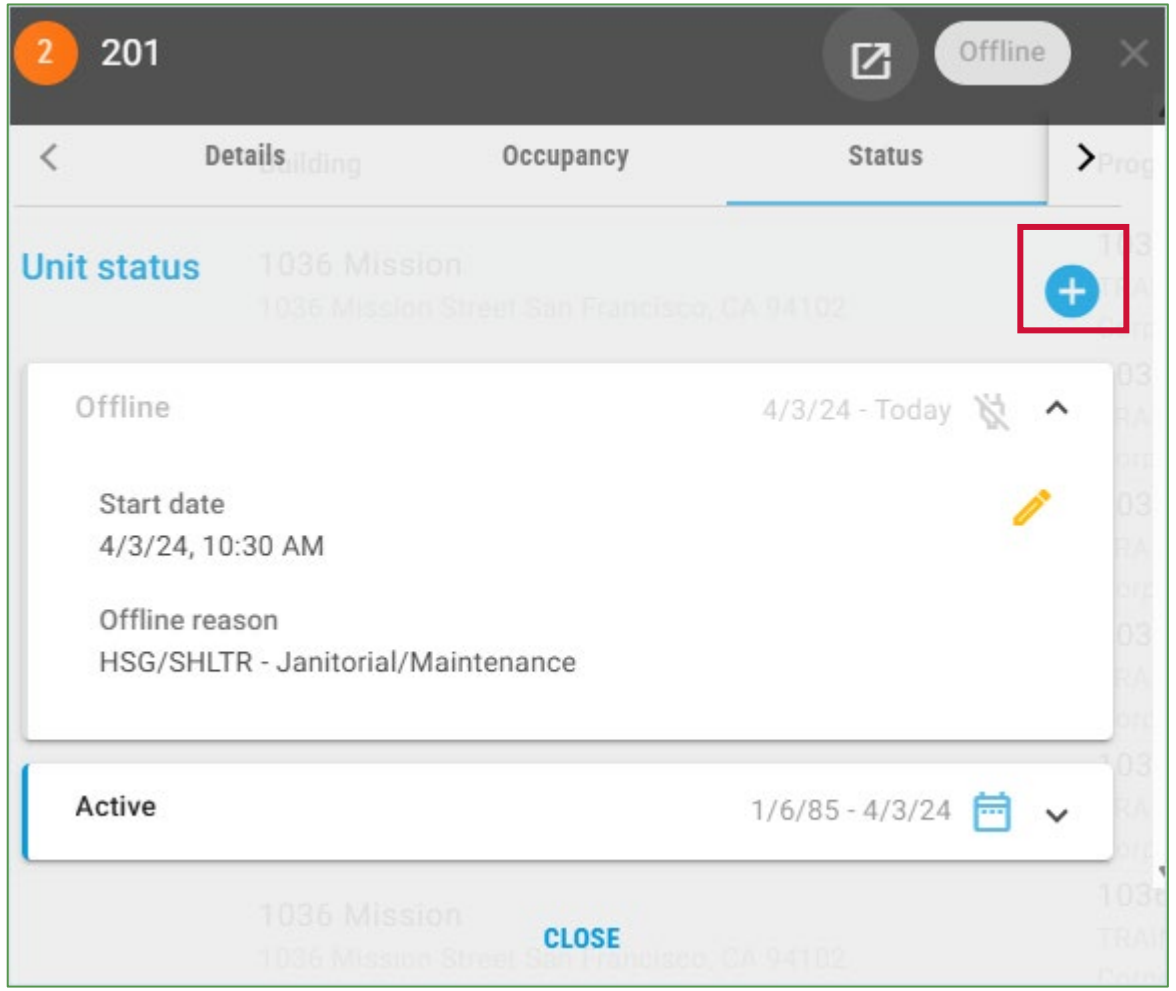
- Add an offline status from the Status tab
- Unit status dates and times cannot overlap
- **Always leave the end date blank**



Changing Offline Reason

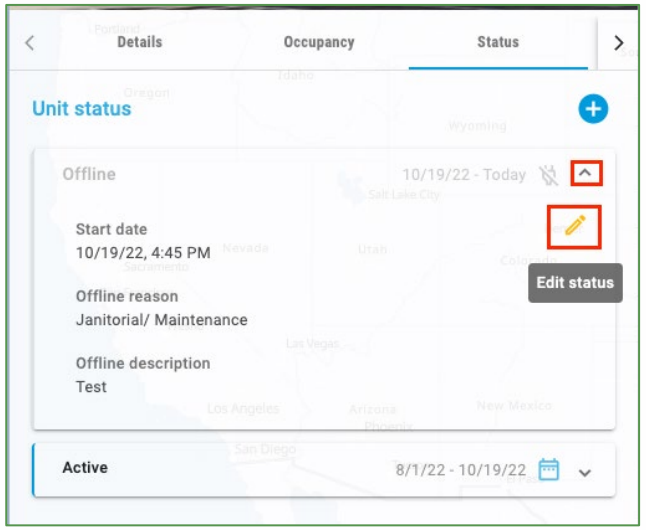
- When an offline reason changes, add a new offline status with the new reason by clicking the blue plus sign

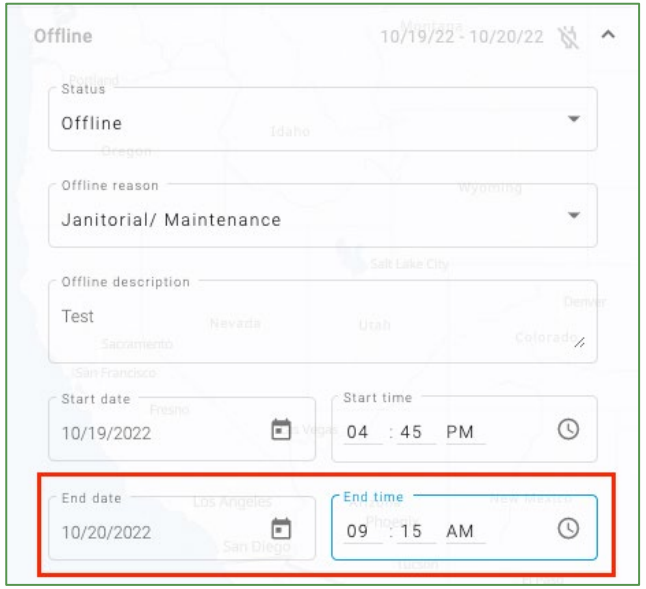
- This will automatically end the prior offline status



Ending Offline Status

- Click the pencil icon to edit the status
- Add an end date to make the unit available
- **Ending the offline status makes a unit available to receive a new referral or assign to a tenant**

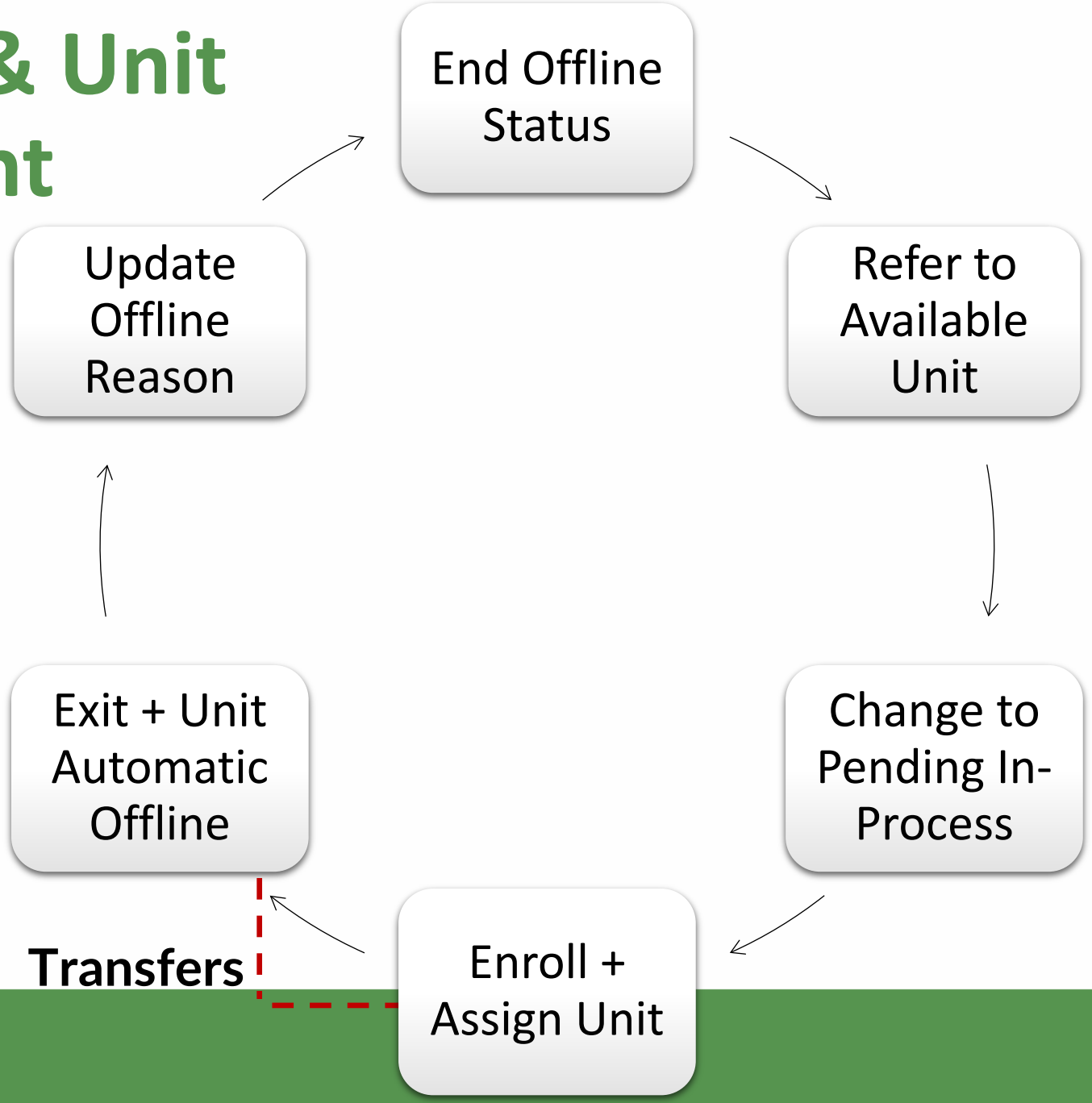




DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING

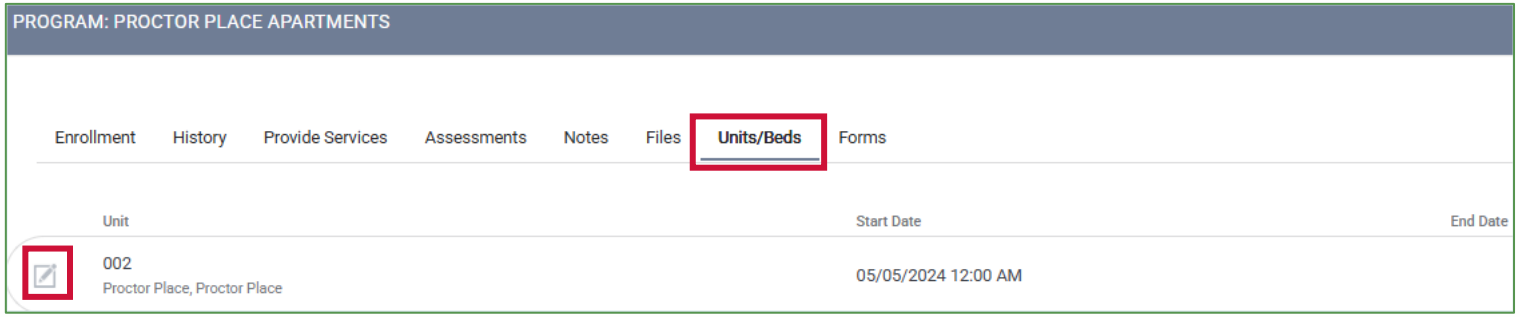
Additional Responsibilities

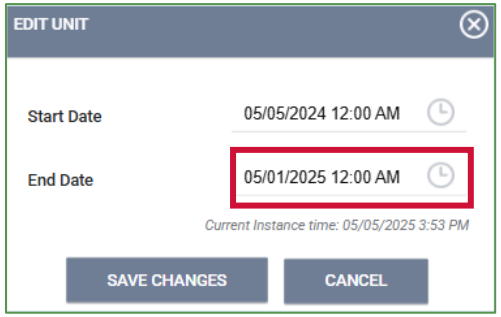
Transfers & Unit Assignment Updates



Transfer Within the Same Program *or* Reassign to Different Unit

Step 1: add End Date for the current unit

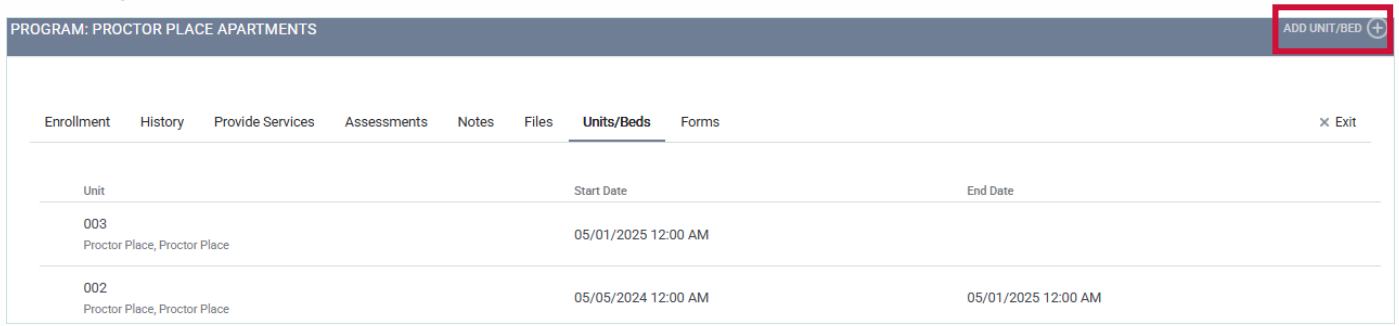


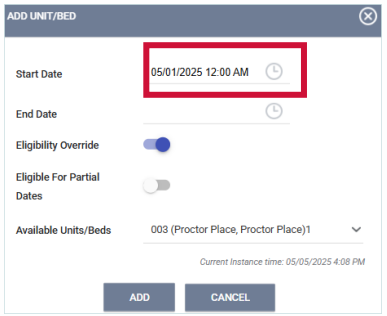


The unit will become offline so you will need to update or end the offline status.

Transfer Within the Same Program *or* Reassign to Different Unit

Step 2: add Start Date for the new unit that doesn't overlap with former unit

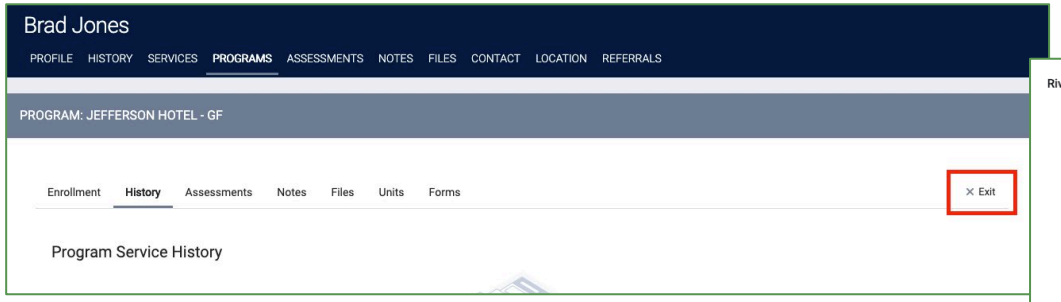




Toggle Eligibility Override on to select from the Available units.

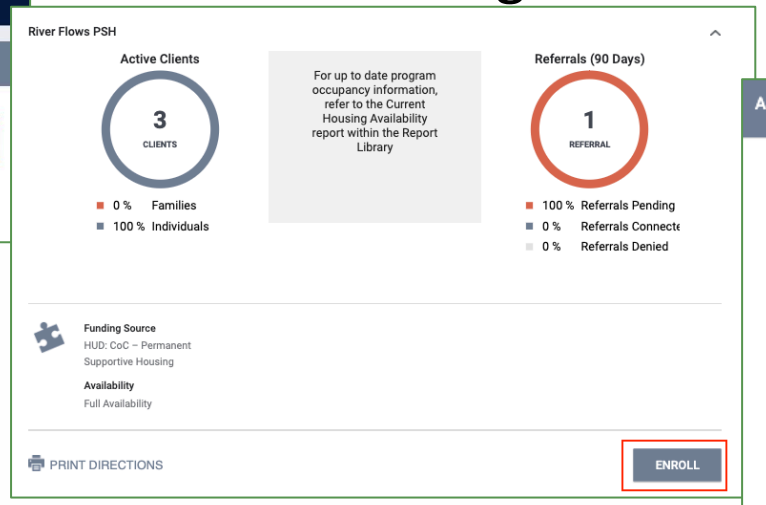
Transfer to a Different Program

Exit from Current Program



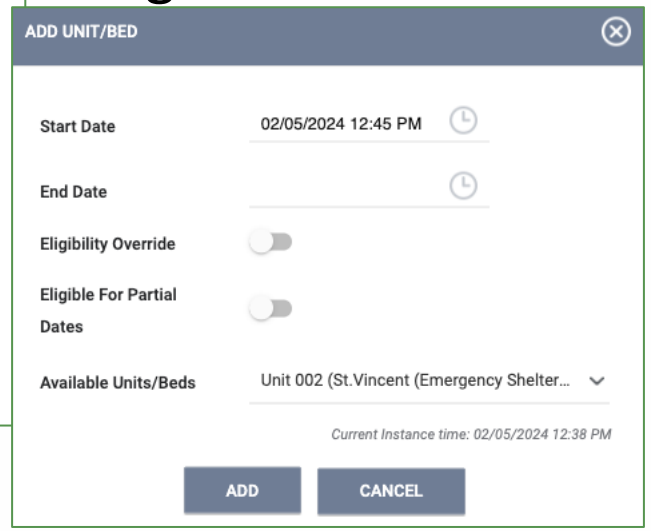
Exit Reason: Unit Relinquished
Exit Destination: Rental by client, with ongoing housing subsidy
Rental Subsidy Type: Permanent Supportive Housing

Enroll in New Program



Prior Living Situation/Type of Residence: Rental by client, with ongoing housing subsidy
Rental Subsidy Type: Permanent Supportive Housing

Assign to New Unit

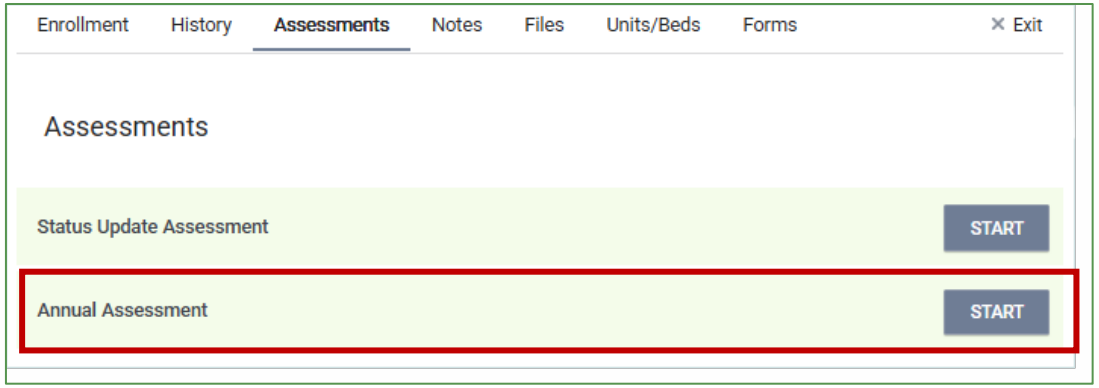


In this situation there may not be a referral to the new program and unit

Annual Assessments

- **Annual Assessments** are due within 30 days before or after the client's anniversary date and must reflect updated information about:
  - Disabling conditions and barriers
  - Income and benefits
  - Health insurance

- Access the **Annual Assessment** from the program enrollment, update any information that has changed, and be sure to save



Annual Assessment Warnings

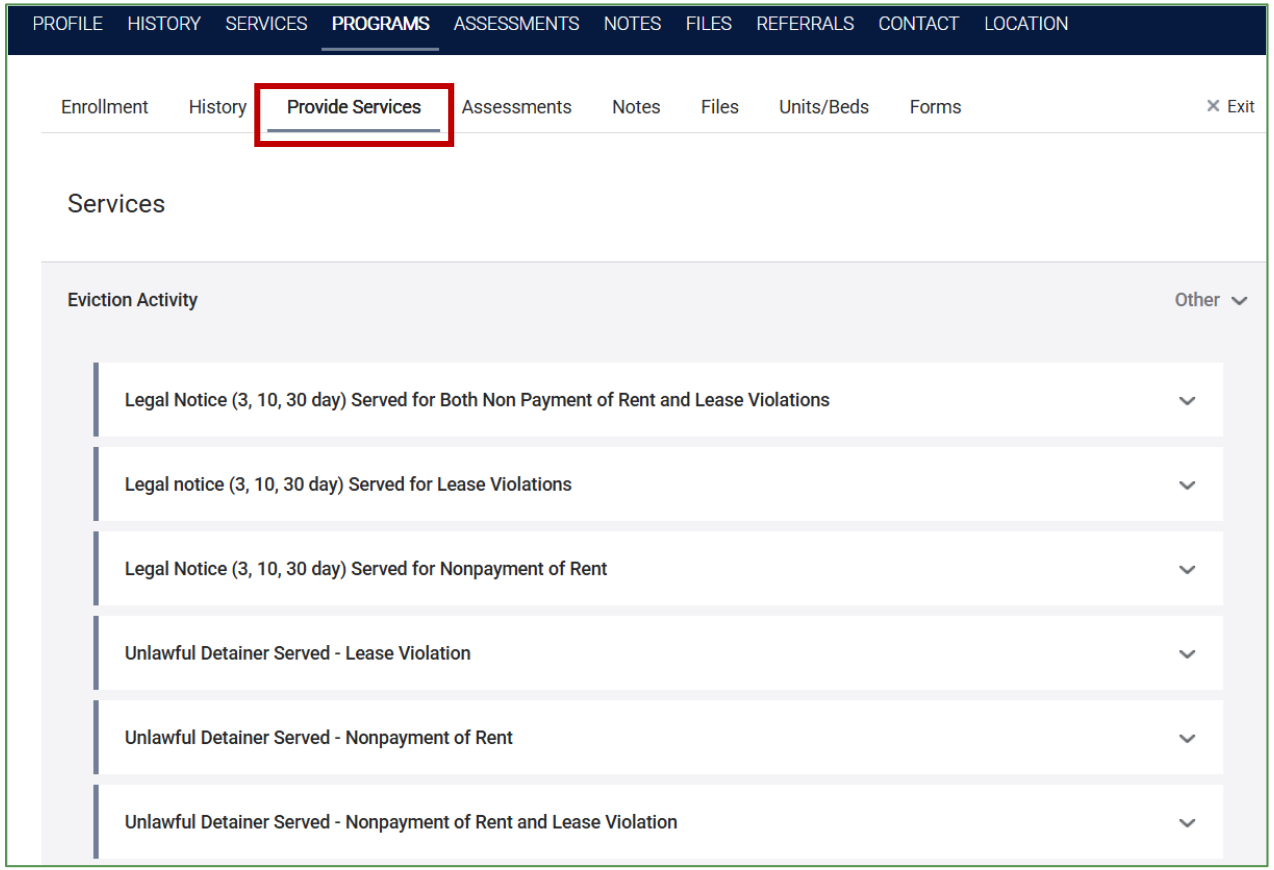
- You will receive automatic notifications when annual assessments are due for future households you enroll

- For existing households, you will need to set yourself as an **Assigned Staff** and toggle on **Assessment due every year** Notification from the program enrollment

- On the right-hand side make sure the toggle is set to **Assessment due every year Notification: ON**

Tracking Eviction Notices & Unlawful Detainers

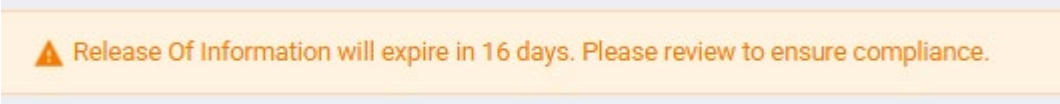
- HSH uses eviction data to understand trends, analyze equity, and report to the Board of Supervisors
- From the program enrollment, record all eviction notices and Unlawful Detainers served by adding an **Eviction Activity** service within 3 days of service on the tenant
- Enter the Event Date (the date the notice or UD was served) and click **Submit**



Homelessness Response System Release of Information (HRS ROI)

- An HRS ROI must be completed when a client profile is created and must be updated every 3 years
- A completed HRS ROI includes:
  - A signed copy of the HRS ROI uploaded to files section of client profile
  - An electronic signature recorded in **Client Privacy** section of client profile
    - Click the shield icon to view **Client Privacy**

- Client profiles with missing or expired HRS ROIs are flagged with a yellow banner



DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING

Reports

Report Library Reports: [GNRL-106] Program Roster

- Accessed under: Report Library > Program Based Reports
- Includes program stay information
- Includes unit assignment

Program Roster Report

United Living International (ULI)
Active within 01/01/2022 thru 03/31/2023

Housing Move-in: Undefined = Unknown HoH or adjusted Move-in is Null, = Non PH Project, **A:** Assessments, **S:** Services, **CN:** Case Notes
You can find more information about adjusted Move-In Date at the Help Center Article
Head of Household (HoH) Unique Identifiers are listed in bold text. Household members are grouped together with the HoH.

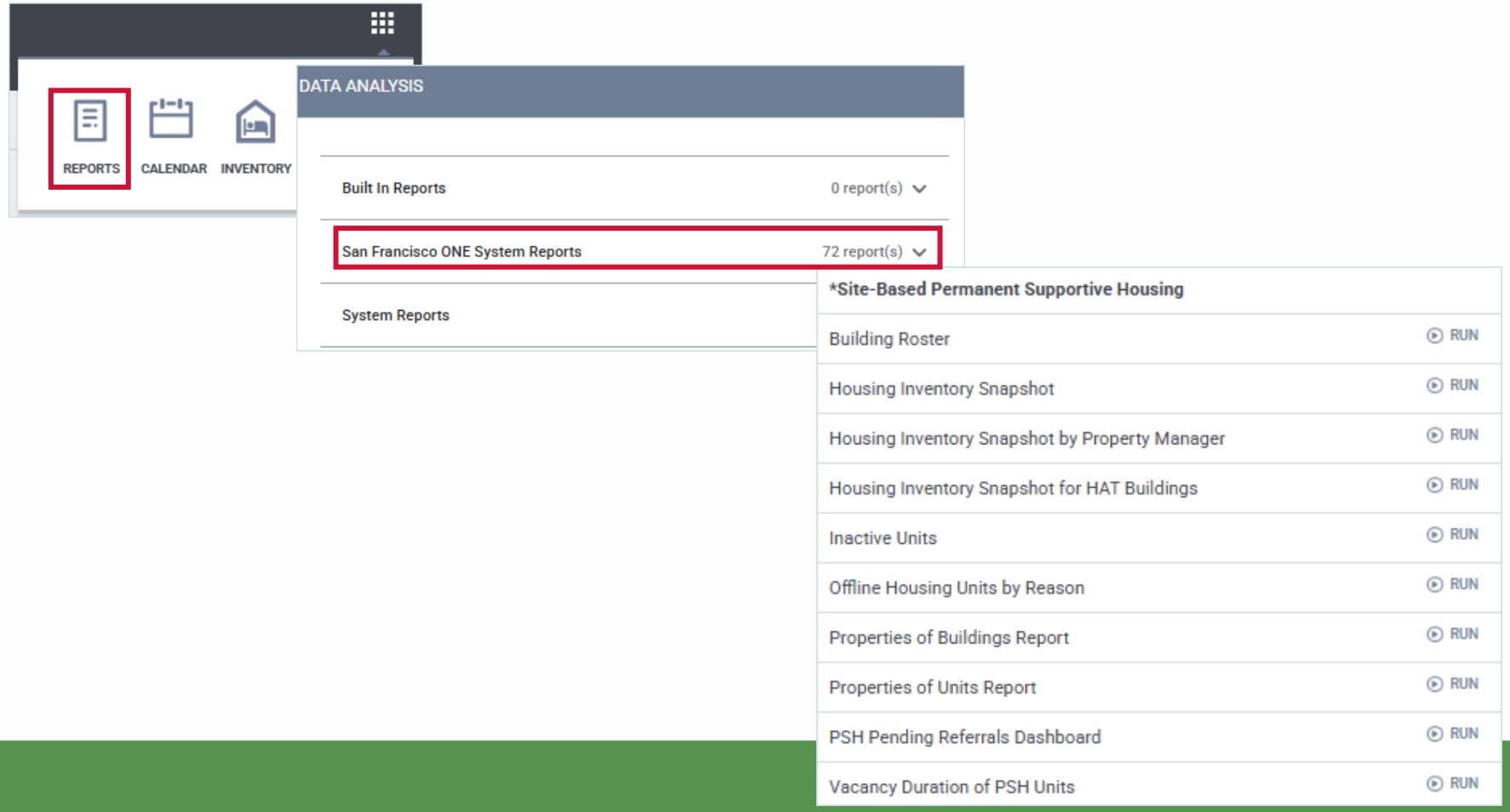
Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff	Unit Assignment	Bed Assignment	Occupancy Start Date	Occupancy End Date
Program: Proctor Place Apartments																
Simmons, Lucy	**D476AF867**	10/06/1985	37	37	10/26/2022	-	157	10/26/2022	0	0	0	S. Hoffman	Unit 111	n/a	10/26/2022	
Simmons, Joy	B292B01C7	11/15/2018	3	4	10/26/2022	11/28/2022	33	10/26/2022	0	0	0	S. Hoffman		n/a		
Roberts, Rob	**A3659C0CC**	11/21/1954	68	68	12/01/2022	12/01/2022	0	12/01/2022	0	0	0	S. Hoffman	Unit 102	n/a	12/01/2022	12/01/2022
Titan, Robin	**FC58384A7**	01/01/2003	19	20	10/26/2022	10/26/2022	0	undefined	0	0	0	A. Maldonado	n/a	n/a	n/a	n/a
Hall, Randall	**C6B6E49FC**	10/13/1956	66	66	10/27/2022	-	156	10/27/2022	0	0	0	M. Wheeler	Unit 105	n/a	10/27/2022	
Robbins, Alexander	**96419981F**	10/30/1995	27	27	12/01/2022	-	121	12/01/2022	0	0	0	S. Hoffman	Unit 108	n/a	12/01/2022	
Robbins, Trevor	8568CD308	12/13/2015	6	7	12/01/2022	-	121	12/01/2022	0	0	0	S. Hoffman		n/a		

Number of Enrollments: 7
Number of Unique Clients: 7
Number of Households: 5

Total Number of Enrollments: 7
Total Number of Unique Clients: 7
Total Number of Households: 5

Data Analysis Reports

Accessed under: Reports > Data Analysis > San Francisco ONE System Reports



Data Analysis Reports: Building Roster Report

Property management should monitor for accuracy of unit availability and status

- Available: ready to receive referral
- Occupied: lists head of household assigned to the unit
- Pending Occupancy: lists client referred to the unit
- Offline: lists current offline reason
- Inactive: units that are not client units (offices, resident manager, etc.)

Building Roster

just now

Is this housing or shelter/navigation center?	Program Name	Current Availability	Building Name *	Building Status
Housing	is any value	is any value	is 1036 Mission	is Active

40
Total Units

Breakdown of Units

	Current Availability	Unit Availability Status
1	Occupied	35
2	Pending Occupancy	3
3	Offline	2
Totals		40

Units by Status

	Building	Program Name	Unit Nam	Population - Unit Type - Funding Source	Current Availability	Offline Reason	Head of Household	ONE Profile Link	Occupancy Start Date	Unique Identifier
1	1036 Mission	1036 Mission - HUD PBV	201	Family - 2BR - HUD PBV	Offline	Automatically Set to Offline	∅	∅	∅	∅
2	1036 Mission	1036 Mission - LOSP	202	Family - 2BR - LOSP	Occupied	∅			2018-07-16	
3	1036 Mission	1036 Mission - CoC	203	Family - 2BR - CoC	Occupied	∅			2018-08-01	
4	1036 Mission	1036 Mission - HUD PBV	206	Family - Jr1BR - HUD PBV	Offline	HSG/SHLTR - Property Hold			∅	
5	1036 Mission	1036 Mission - CoC	207	Family - 1BR - CoC	Occupied	∅			2023-04-21	
6	1036 Mission	1036 Mission - CoC	209	Family - Jr1BR - CoC	Occupied	∅			2025-04-18	
7	1036 Mission	1036 Mission - CoC	301	Family - 2BR - CoC	Occupied	∅			2018-07-16	
8	1036 Mission	1036 Mission - CoC	302	Family - 2BR - CoC	Occupied	∅			2018-07-31	
9	1036 Mission	1036 Mission - CoC	305	Family - 3BR - CoC	Occupied	∅			2018-07-16	
10	1036 Mission	1036 Mission - LOSP	306	Family - Jr1BR - LOSP	Occupied	∅			2020-01-07	
11	1036 Mission	1036 Mission - CoC	307	Family - Jr1BR - CoC	Occupied	∅			2021-08-20	
12	1036 Mission	1036 Mission - CoC	311	Family - 2BR - CoC	Occupied	∅			2018-08-07	
13	1036 Mission	1036 Mission - LOSP	401	Family - 2BR - LOSP	Occupied	∅			2024-07-30	
14	1036 Mission	1036 Mission - CoC	402	Family - 2BR - CoC	Occupied	∅			2018-07-17	
15	1036 Mission	1036 Mission - CoC	403	Family - 2BR - CoC	Occupied	∅			2024-11-23	
16	1036 Mission	1036 Mission - CoC	404	Family - 2BR - CoC	Occupied	∅			2024-10-31	
17	1036 Mission	1036 Mission - LOSP	405	Family - 3BR - LOSP	Occupied	∅			2018-08-07	
18	1036 Mission	1036 Mission - CoC	406	Family - Jr1BR - CoC	Occupied	∅			2021-06-01	
19	1036 Mission	1036 Mission - HUD PBV	501	Family - 2BR - HUD PBV	Pending Occu...	∅			∅	
20	1036 Mission	1036 Mission - CoC	505	Family - 3BR - CoC	Occupied	∅			2018-07-16	

Data Analysis Reports: Other Reports

- Housing Inventory Snapshot
  - Count of units associated with site-based PSH programs by availability and status
  - See also Housing Inventory Snapshot by Property Manager
- Offline Housing Units by Reason
- Responsible Staff Who Receive Referral Notifications
- Properties of Buildings Report and Properties of Units Report
  - Contact your HSH program manager if building or unit details change or are incorrect

What if I need support?

- Review documentation (available on the Bitfocus help site)
  - Toolkits
  - Training slides and videos
- Contact the Bitfocus Help Desk and can be reached several ways:
  - Email onesf@bitfocus.com
  - Call 415-429-4211: 5am to 5pm, M-F
  - Click the "Help" button to chat on the OneSF support site: 5am to 5pm, M-F
- Attend virtual office hours
  - Held on the 4th Tuesday of the month from 2 - 3pm

Thank you and Questions!