



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

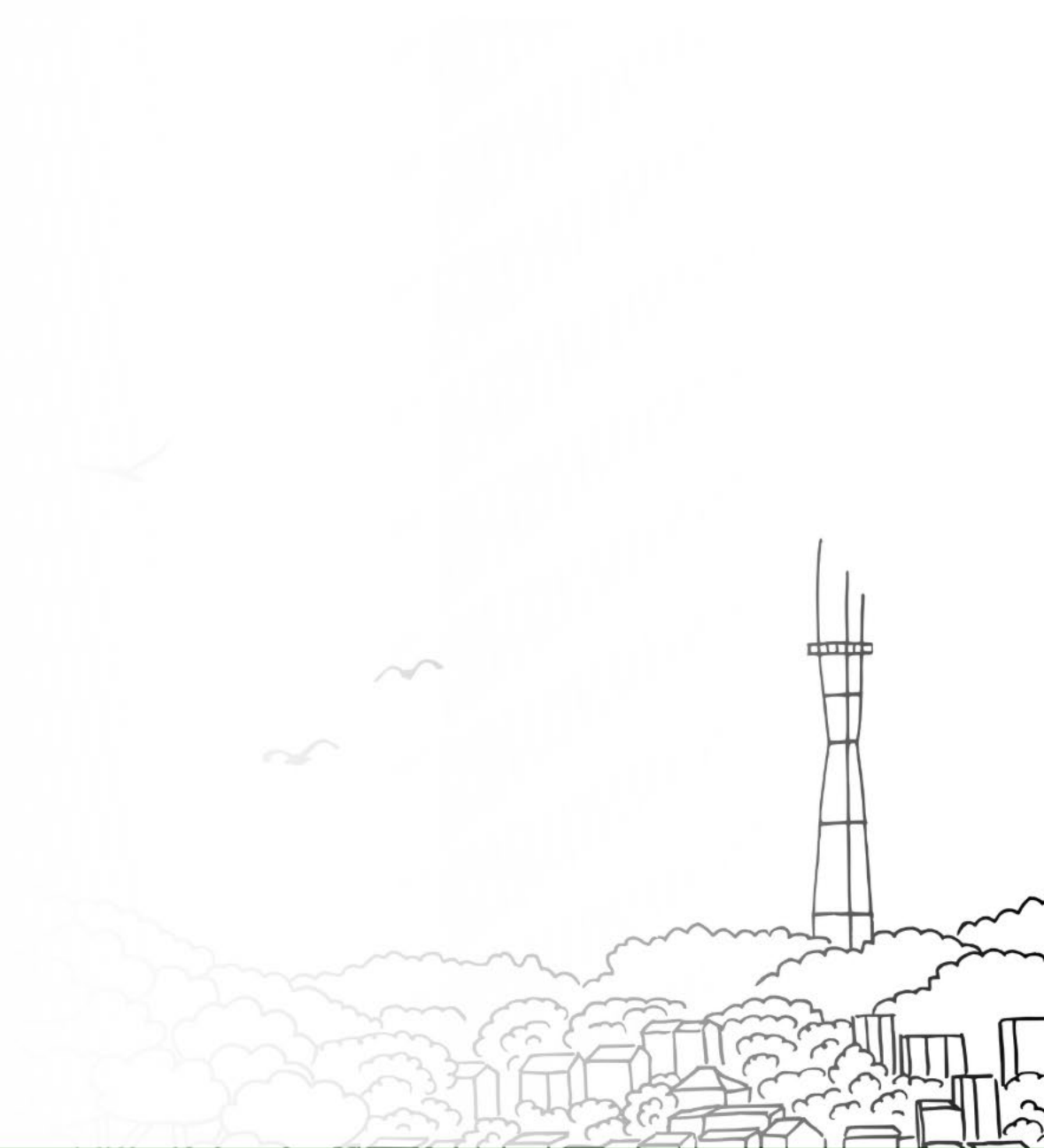
## • Property Management

- 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

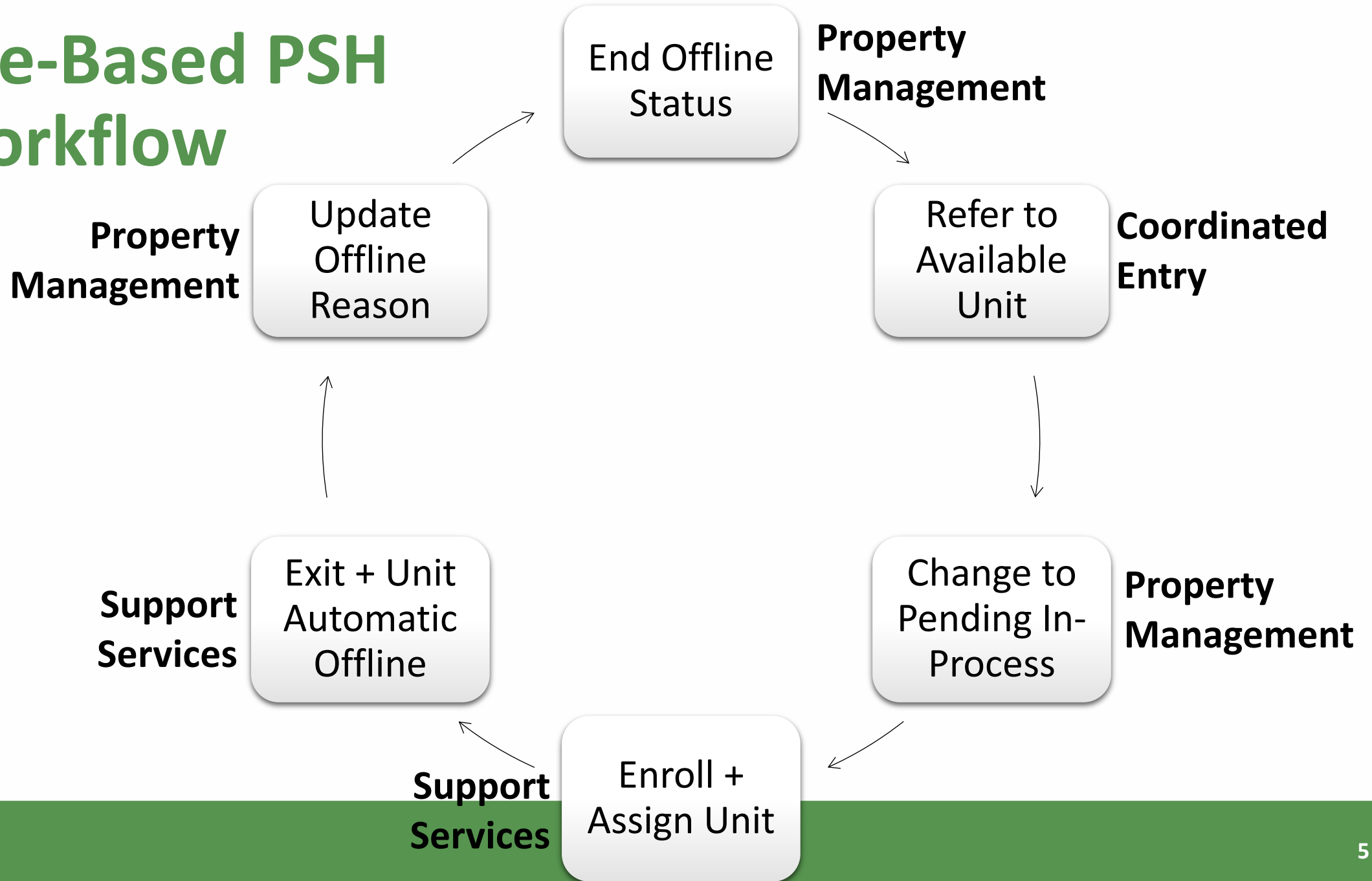


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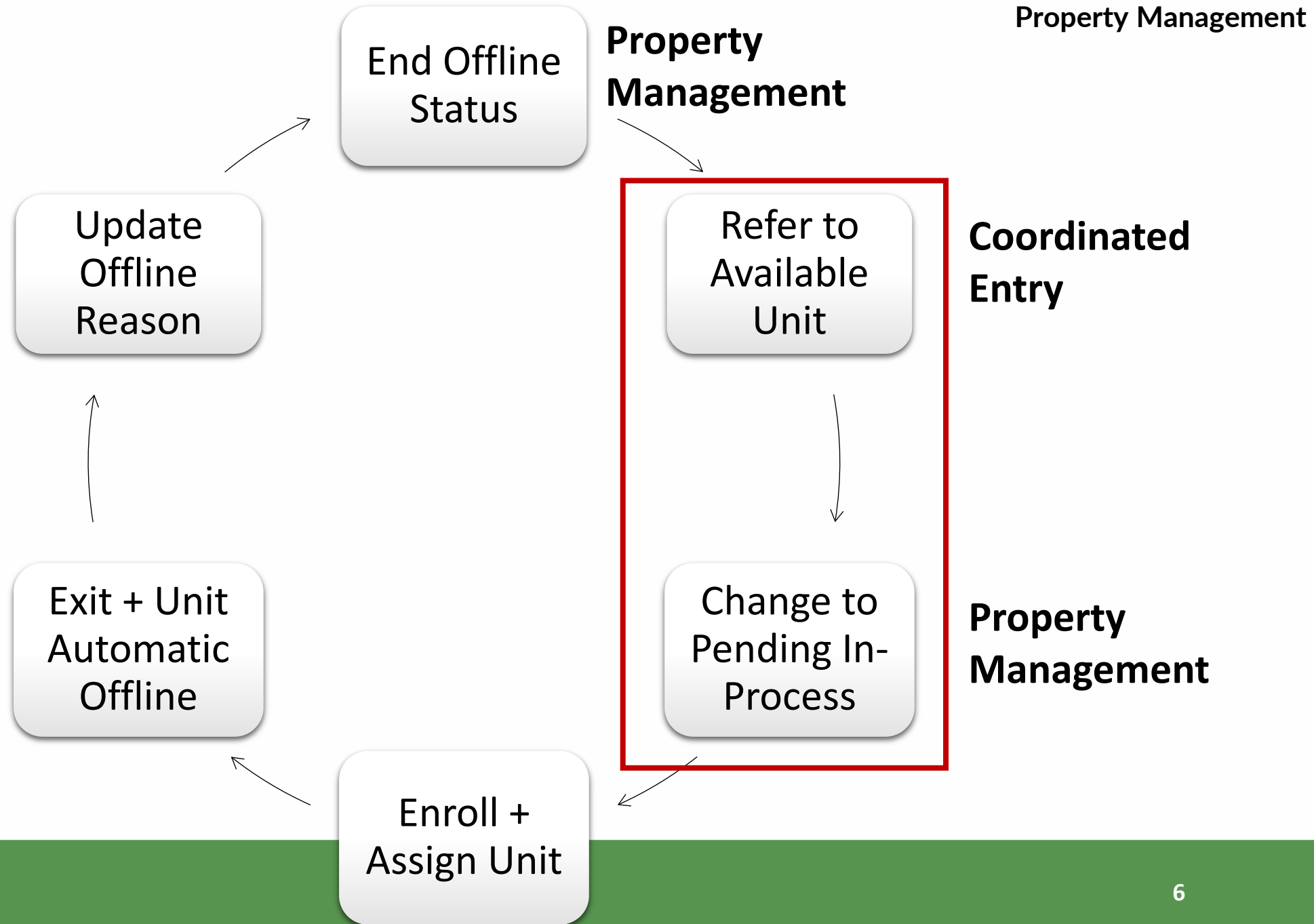
# Housing Workflow



# Site-Based PSH Workflow



# Referral



# 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: EDIT

Client	Belles E
Referred Unit	207
Referred Program	1036 Mission - CoC
Referred to Agency	TRAIN - Tenderloin Neighborhood Development Corporation
Referring Agency	TRAIN - Department of Homelessness and Supportive Housing
Referred Date	05/13/2025 6:00 PM
Days Pending	2 day(s)
In Process	0 day(s)
Qualified	Reassigned
Referred by Staff	Lehua Asher
Case Manager	Select
Last Activity	05/14/2025
Current Status	Pending <input checked="" type="checkbox"/>
Status Date	05/16/2025 1:00 PM
New Status	Pending - In Process
Private	<input type="checkbox"/>

# 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	<div>The client is over income </div>	

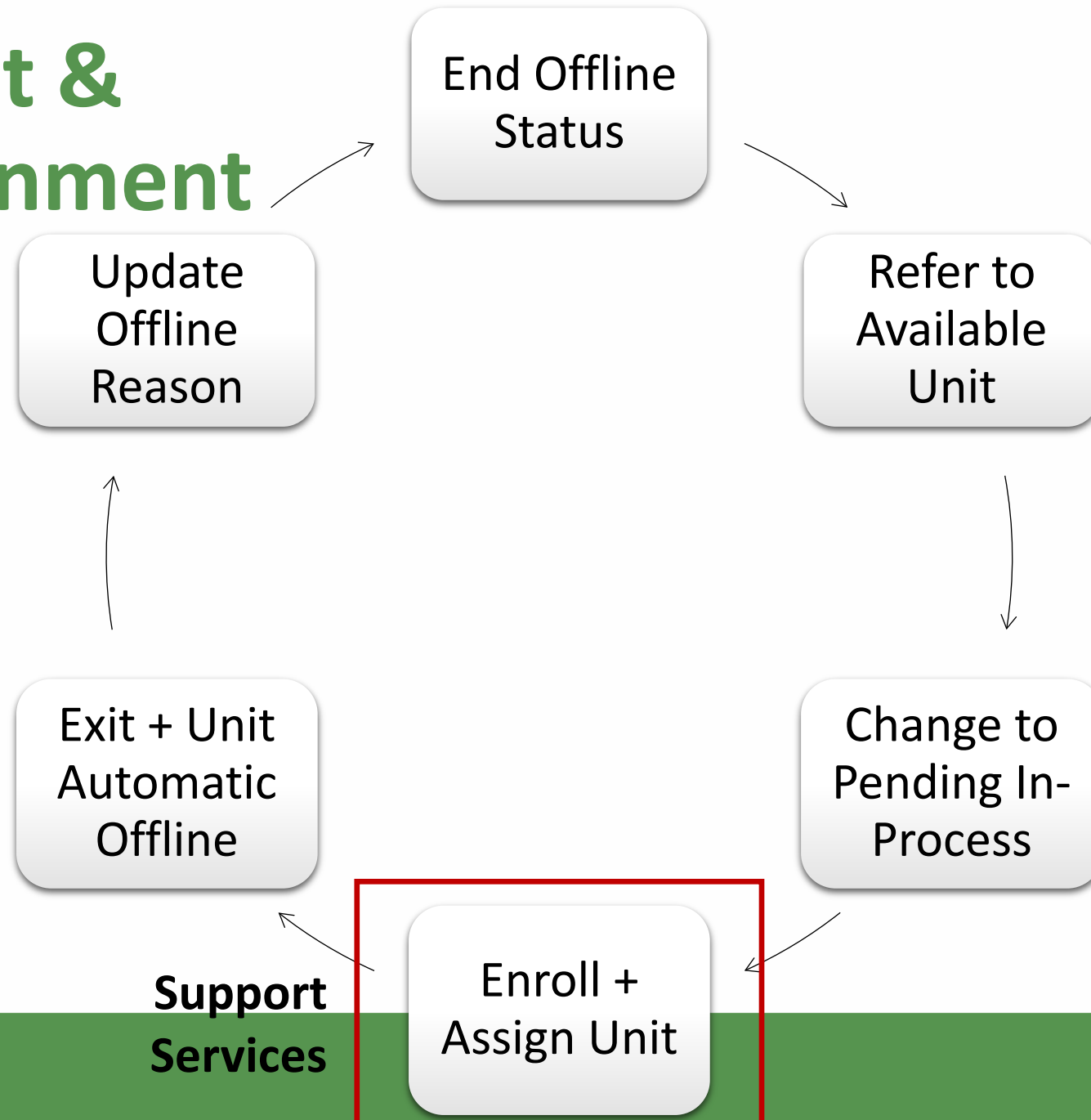


# Unit Status/Availability

- 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.

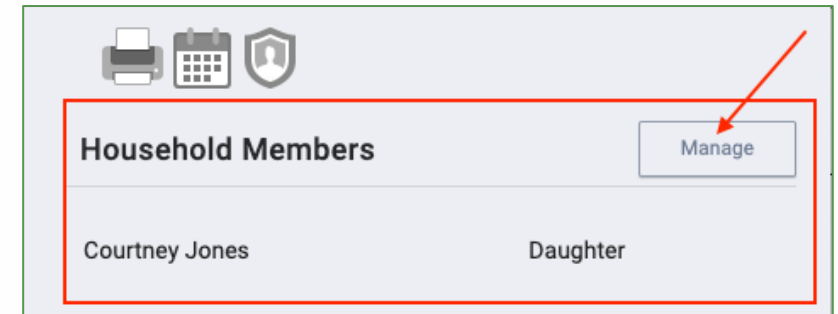
# Enrollment & Unit Assignment



**Support  
Services**

# 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


The screenshot displays a web form for program enrollment. At the top, the 'Funding Source' is 'HUD: CoC - Permanent Supportive Housing' with a note 'Limited Availability'. 'Service Categories' include 'Employment', 'Case Management', and 'RETIRED (Coordinated Entry Event)'. Under 'HOUSING AVAILABILITY', a dropdown shows 'Households without children' with '22 Beds in 14 Units'. A red box highlights '1 pending referral(s). Oldest 0 days.' Below this, a toggle switch for 'Program Placement a result of Referral provided by Big River Housing' is turned on. Another red box highlights the 'Include group members' section, which lists 'Allie Sebastian'. At the bottom, there are links for 'PRINT DIRECTIONS' and 'DOC REQUIREMENTS', and a blue 'ENROLL' button.

**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 X 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

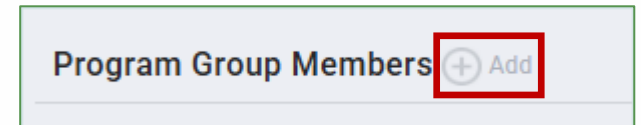
Enrollment	History	Provide Services	Assessments	Notes	Files	Units/Beds	Forms
Unit		Start Date					
205		12/21/2023 12:00 AM					
Pacific Bay Inn, Pacific Bay Inn							

- 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.**

Program Type:	Individual
Program Start Date:	12/21/2023
Assigned Staff:	Test User
Head of Household:	Sally Huffman
Unit Name:	205

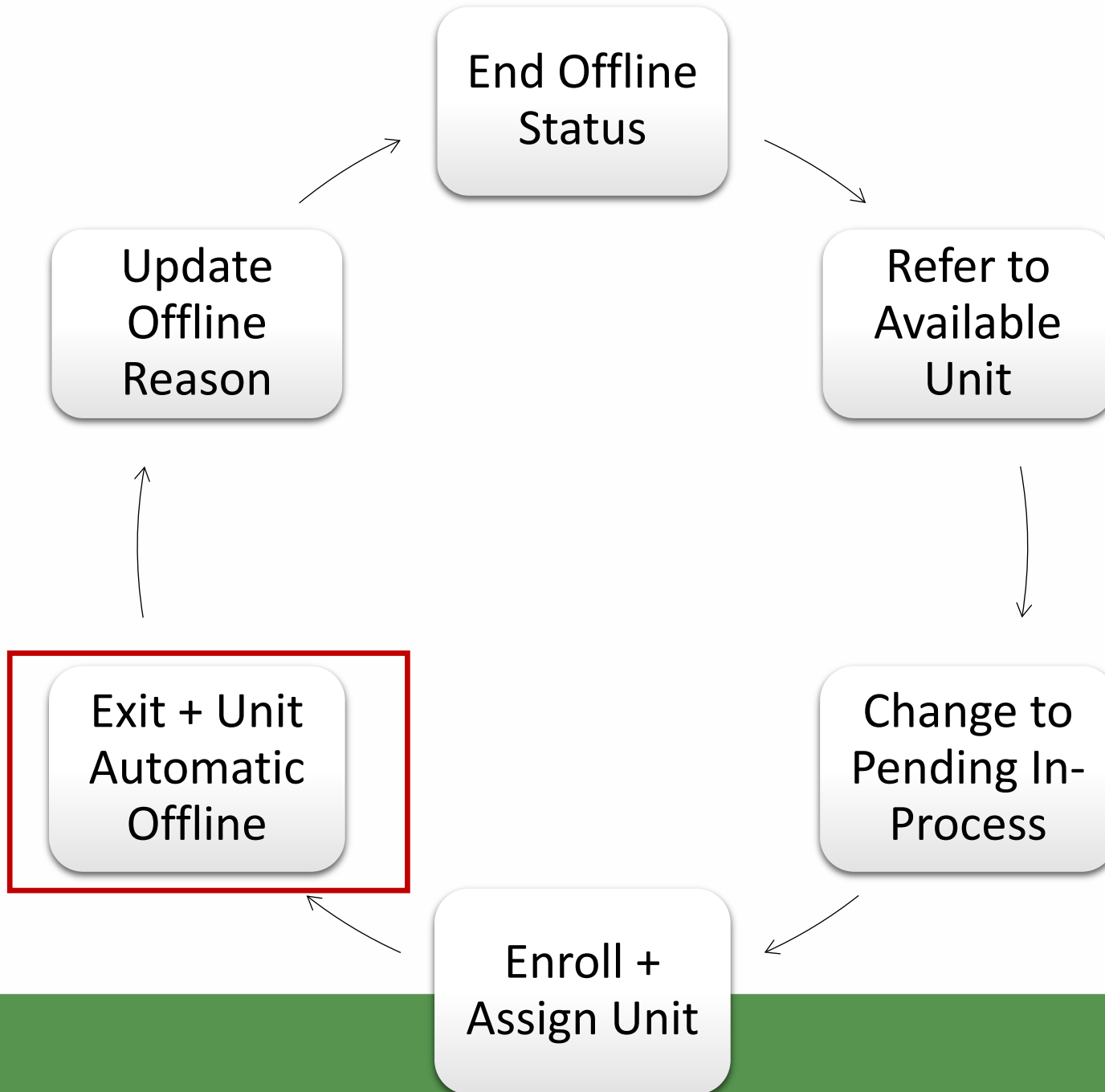
# Add a New Household Member to a Program Enrollment

- 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

## Support Services





# Exiting Client from Program

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

Sir Rafic

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

PROGRAM: 1036 MISSION - COC

Enrollment **History** Provide Services Assessments Notes Files Units/Beds Forms **X Exit**

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

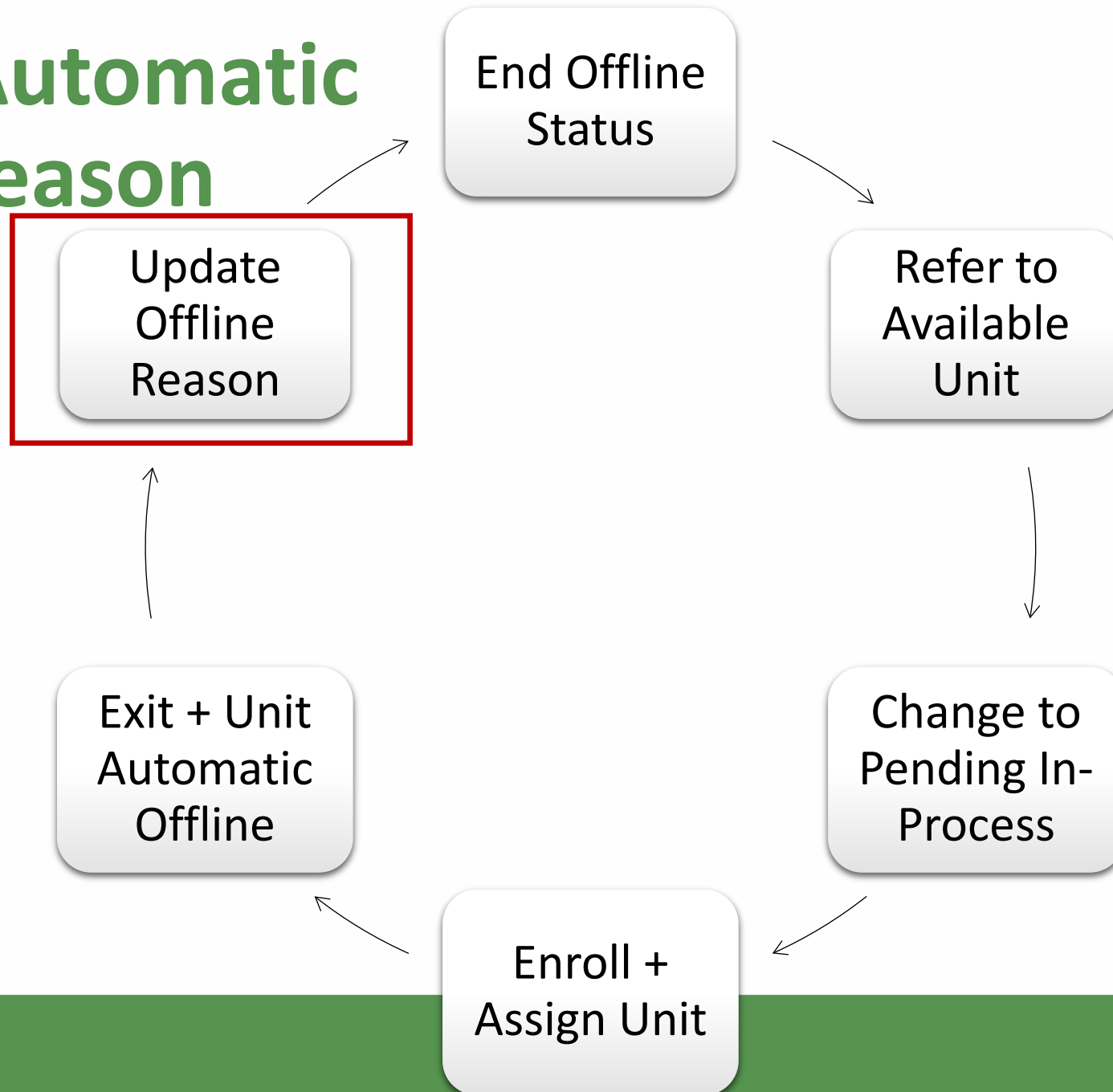
OPEN OCCUPANCY			
Unit/Bed	Start Date and Time	End Date and Time	Change End Date and Time
301 1036 Mission, 1036 Mission	11/04/2024 6:15 PM	05/13/2025 6:30 PM	

Enrollment	History	Assessments	Notes	Files	<b>Units/Beds</b>	Forms
Unit	Start Date		End Date			
301 1036 Mission, 1036 Mission	11/04/2024 6:15 PM		05/13/2025 6:30 PM			

- 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
<b>Automatically Set to Offline</b>	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
<b>HSG – Building Rehab</b>	Planned building rehab/construction: written notification and timeline submitted to HSH Program Manager prior to setting unit offline.	Varies
<b>HSG – Coroner Hold</b>	The unit is held pending a coroner or medical examiner review, or public administrator notification of next of kin.	30-90 days
<b>HSG – Internal Transfer</b>	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
<b>HSG – Occupied by Legacy Tenant</b>	The unit is currently occupied by a legacy tenant who is not enrolled in the program in ONE.	Ongoing
<b>HSG – Occupied but No Client ROI</b>	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
<b>HSG – Occupied Temporarily by Client from Other Program/Building</b>	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
<b>HSG – Significant Damage</b>	Unit with significant damage due to fire, flood, or other significant incident.	90 days
<b>HSG/SHLTR – Janitorial/Maintenance</b>	The unit is unavailable for client placement due to janitorial or maintenance needs.	14-30 days
<b>HSG/SHLTR – Property Hold</b>	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
<b>SHLTR – Hospital Hold</b>	The unit or bed is held for a client who is temporarily at a health care facility. Not used for housing.	
<b>SHLTR – Jail Hold</b>	The unit or bed is held for a client who is temporarily incarcerated. Not used for housing.	

# Offline Reasons for Occupied Units

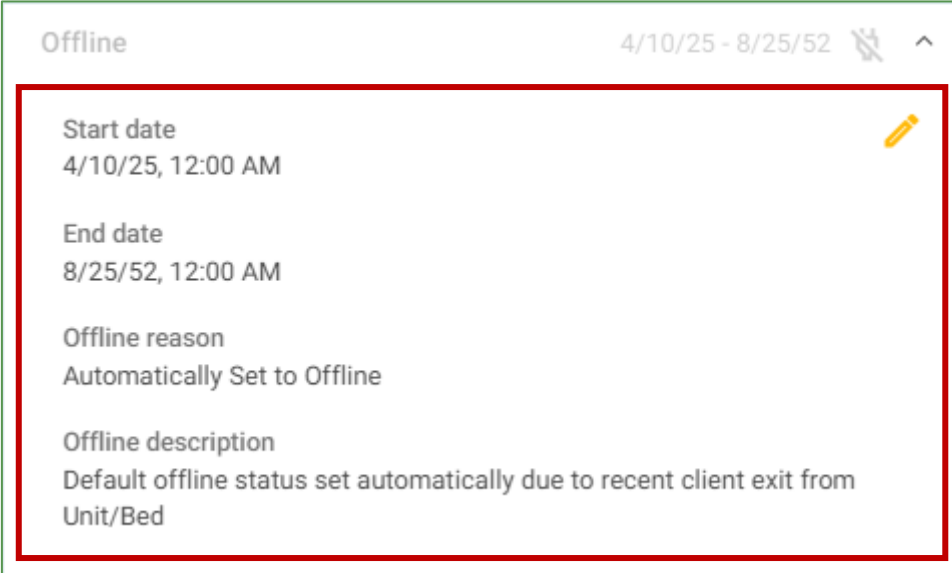
- Three Offline Reasons indicate a unit is occupied but the tenant is not enrolled in the program:
  - HSG - Occupied by Legacy Tenant
  - HSG - Occupied but No Client ROI
  - HSG - Occupied Temporarily by Client from Other Program/Building
- [Click to open the housing toolkit for more details](#)


# 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



Offline 4/10/25 - 8/25/52  ^

Start date  
4/10/25, 12:00 AM 

End date  
8/25/52, 12:00 AM

Offline reason  
Automatically Set to Offline

Offline description  
Default offline status set automatically due to recent client exit from Unit/Bed

# 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

2 206

Offline

< Details Occupancy Status >

Unit status 1036 Mission  
1036 Mission Street San Francisco, CA 94102

Offline 4/1/25 - Today

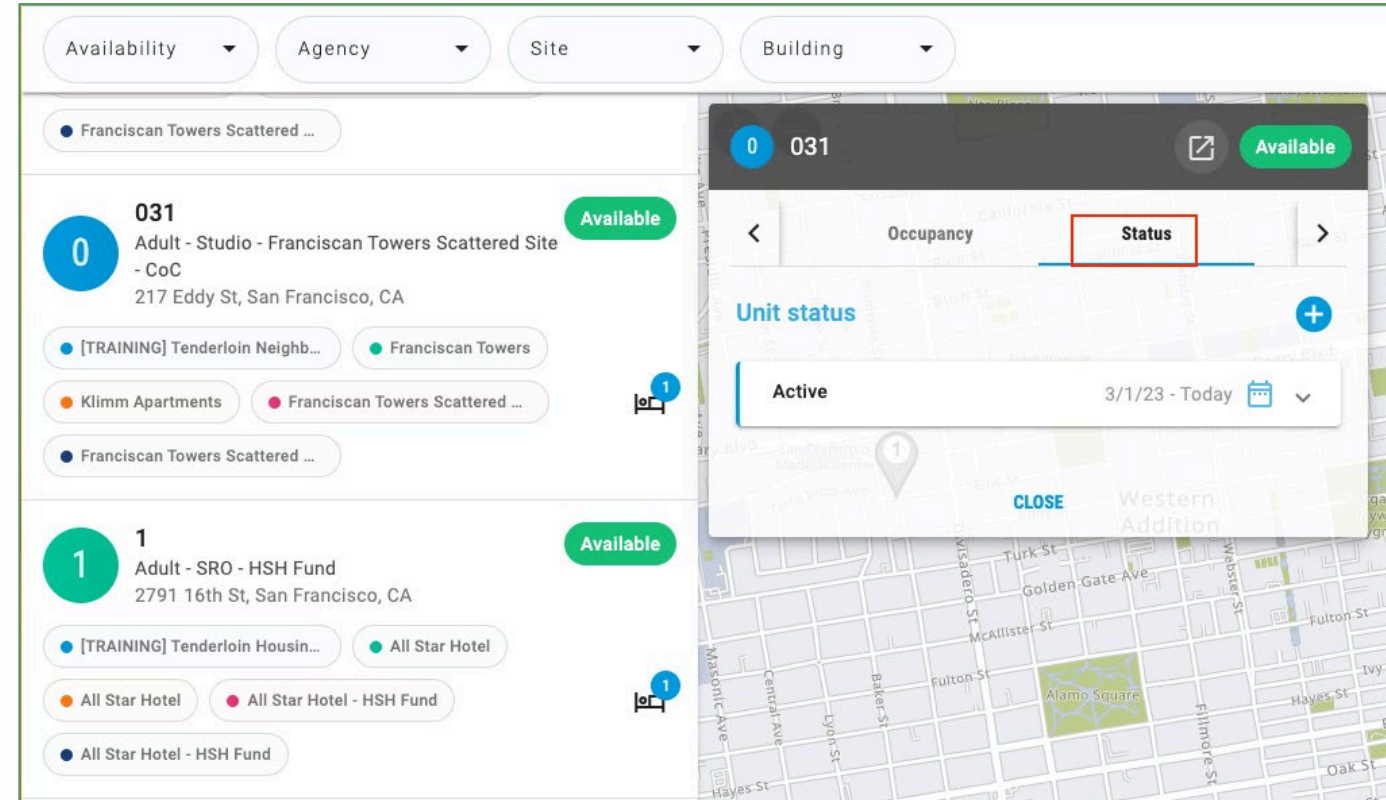
Start date  
4/1/25, 11:30 AM

Offline reason  
HSG/SHLTR - Janitorial/Maintenance

Offline description  
As of 5/1/2025, new window is still needed. Estimated completion date 5/15/2025.

# 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

The screenshot shows a mobile application interface for managing unit status. At the top, there's a header bar with a unit number '201' and an 'Offline' button. Below this, there are tabs for 'Details', 'Occupancy', and 'Status'. The 'Status' tab is selected. Under the 'Unit status' section, there's a list of status entries. The first entry is 'Offline' with a start date of '4/3/24 - Today' and a reason of 'HSG/SHLTR - Janitorial/Maintenance'. A red box highlights a blue plus sign icon in the top right corner of the status list, indicating where to click to add a new status. Below the 'Offline' entry, there's an 'Active' entry with a start date of '1/6/85 - 4/3/24'. At the bottom, there's a 'CLOSE' button.

# 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**

The screenshot shows the 'Status' tab of a property management application. The 'Unit status' section is highlighted. It displays the current status as 'Offline' with a date range of '10/19/22 - Today'. A red box highlights the 'Offline' status and the date range. Below this, the 'Start date' is '10/19/22, 4:45 PM', the 'Offline reason' is 'Janitorial/ Maintenance', and the 'Offline description' is 'Test'. A red box highlights the 'Edit status' button. At the bottom, the 'Active' status is shown with a date range of '8/1/22 - 10/19/22'.

The screenshot shows the 'Offline' status edit form. The 'Status' dropdown is set to 'Offline'. The 'Offline reason' dropdown is set to 'Janitorial/ Maintenance'. The 'Offline description' text field contains 'Test'. The 'Start date' is '10/19/2022' and the 'Start time' is '04 : 45 PM'. The 'End date' is '10/20/2022' and the 'End time' is '09 : 15 AM'. A red box highlights the 'End date' and 'End time' fields.

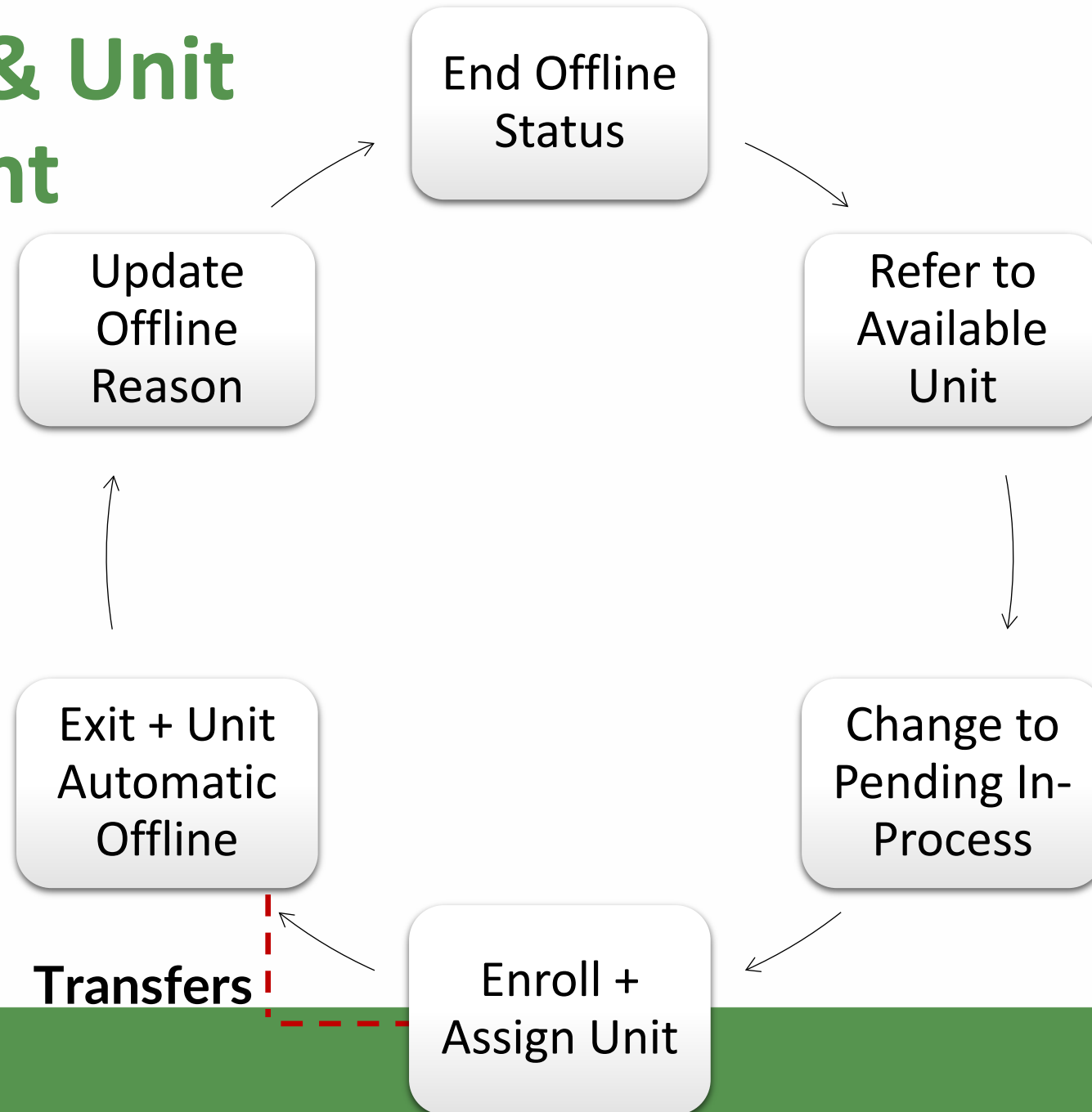


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# Additional Responsibilities



# Transfers & Unit Assignment Updates




Transfers

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

Step 1: add End Date for the current unit

PROGRAM: PROCTOR PLACE APARTMENTS

Enrollment History Provide Services Assessments Notes Files **Units/Beds** Forms

Unit	Start Date	End Date
 002 Proctor Place, Proctor Place	05/05/2024 12:00 AM	

EDIT UNIT

Start Date 05/05/2024 12:00 AM

End Date **05/01/2025 12:00 AM**

Current Instance time: 05/05/2025 3:53 PM

SAVE CHANGES CANCEL

**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

PROGRAM: PROCTOR PLACE APARTMENTS

ADD UNIT/BED +

Enrollment	History	Provide Services	Assessments	Notes	Files	Units/Beds	Forms	✕ Exit
Unit	Start Date	End Date						
003 Proctor Place, Proctor Place	05/01/2025 12:00 AM							
002 Proctor Place, Proctor Place	05/05/2024 12:00 AM	05/01/2025 12:00 AM						

ADD UNIT/BED

Start Date 05/01/2025 12:00 AM

End Date

Eligibility Override ☒

Eligible For Partial Dates ☐

Available Units/Beds 003 (Proctor Place, Proctor Place)1

Current Instance time: 05/05/2025 4:08 PM

ADD CANCEL

**Toggle Eligibility Override on to select from the Available units.**

# Transfer to a Different Program

## Exit from Current Program

Brad Jones

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

PROGRAM: JEFFERSON HOTEL - GF

Enrollment **History** Assessments Notes Files Units Forms

Program Service History

X Exit

**Exit Reason:** Unit Relinquished

**Exit Destination:** Rental by client, with ongoing housing subsidy

**Rental Subsidy Type:** Permanent Supportive Housing

## Enroll in New Program

River Flows PSH

Active Clients

3 CLIENTS

0 % Families  
100 % Individuals

Referrals (90 Days)

1 REFERRAL

100 % Referrals Pending  
0 % Referrals Connect  
0 % Referrals Denied

For up to date program occupancy information, refer to the Current Housing Availability report within the Report Library

Funding Source  
HUD: CoC - Permanent Supportive Housing

Availability  
Full Availability

PRINT DIRECTIONS

ENROLL

**Prior Living Situation/Type of Residence:** Rental by client, with ongoing housing subsidy

**Rental Subsidy Type:** Permanent Supportive Housing

## Assign to New Unit

ADD UNIT/BED

Start Date 02/05/2024 12:45 PM

End Date

Eligibility Override

Eligible For Partial Dates

Available Units/Beds Unit 002 (St.Vincent (Emergency Shelter...)

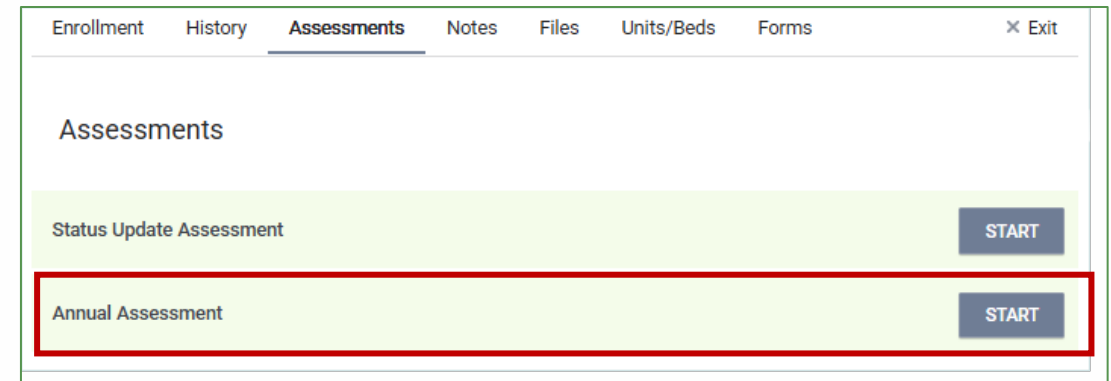
Current Instance time: 02/05/2024 12:38 PM

ADD CANCEL

**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



Enrollment	History	Assessments	Notes	Files	Units/Beds	Forms	× Exit
Assessments							
Status Update Assessment							START
Annual Assessment							START



# 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**

The screenshot displays the HSH system interface. At the top, a dark blue navigation bar contains the following tabs: PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted), ASSESSMENTS, NOTES, FILES, REFERRALS, CONTACT, and LOCATION. Below this, a secondary navigation bar includes Enrollment, History, Provide Services (highlighted with a red box), Assessments, Notes, Files, Units/Beds, Forms, and an Exit button. The main content area is titled 'Services' and features a section for 'Eviction Activity' with a dropdown menu set to 'Other'. Below this section, there is a list of six eviction activities, each with a dropdown arrow on the right:

- Legal Notice (3, 10, 30 day) Served for Both Non Payment of Rent and Lease Violations
- Legal notice (3, 10, 30 day) Served for Lease Violations
- Legal Notice (3, 10, 30 day) Served for Nonpayment of Rent
- Unlawful Detainer Served - Lease Violation
- Unlawful Detainer Served - Nonpayment of Rent
- Unlawful Detainer Served - Nonpayment of Rent and Lease Violation

# 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

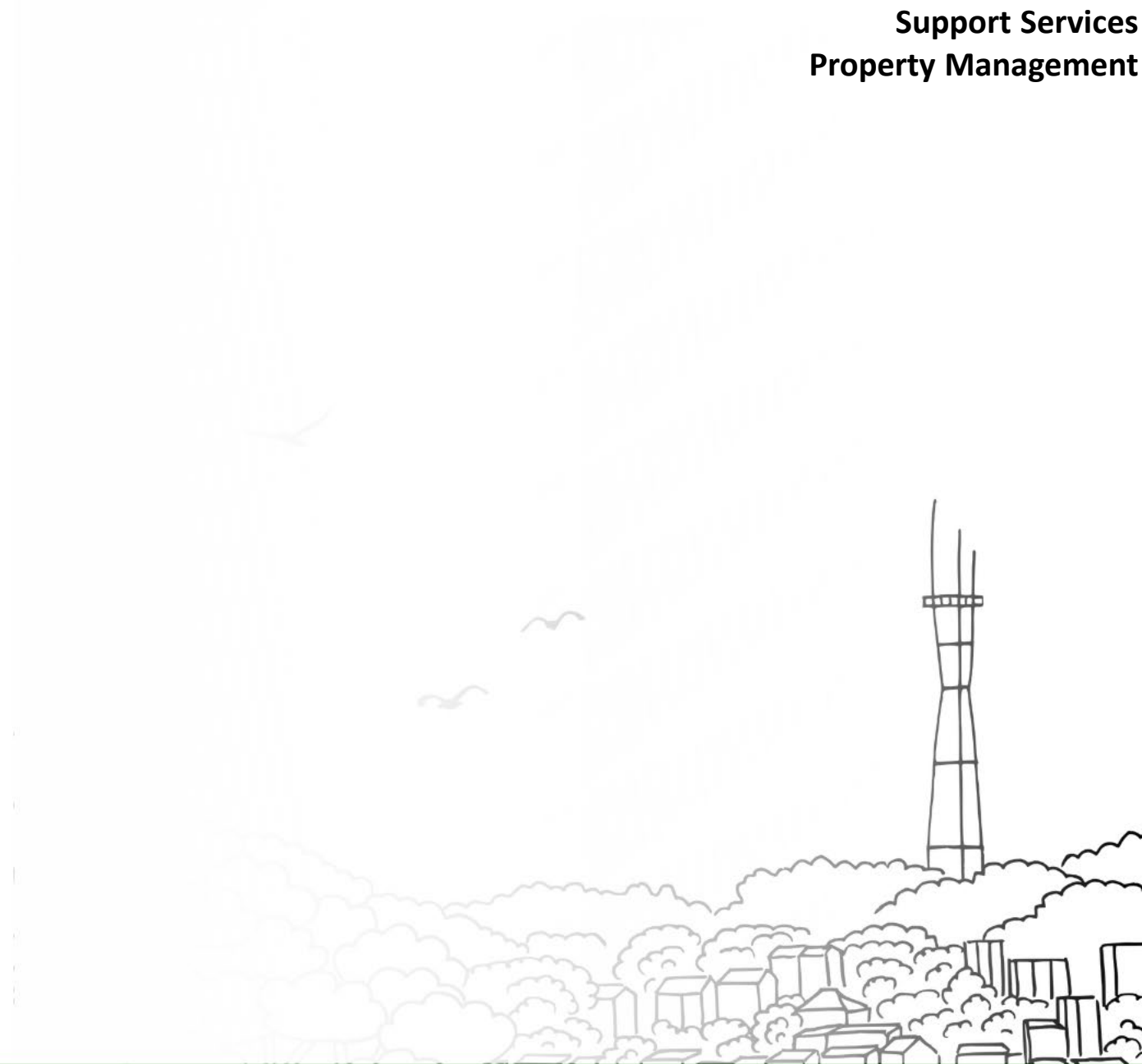


⚠ Release Of Information will expire in 16 days. Please review to ensure compliance.



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# Reports





# Data Analysis Reports

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

The screenshot shows a web application interface for Data Analysis. On the left, a sidebar contains three icons: a document icon labeled 'REPORTS' (highlighted with a red box), a calendar icon labeled 'CALENDAR', and a house icon labeled 'INVENTORY'. The main content area is titled 'DATA ANALYSIS' and contains a list of report categories. The 'San Francisco ONE System Reports' category is highlighted with a red box and shows '72 report(s)'. Below this, a list of reports is displayed under the heading '\*Site-Based Permanent Supportive Housing'. Each report has a 'RUN' button next to it.

*Site-Based Permanent Supportive Housing	
Building Roster	<a href="#">RUN</a>
Housing Inventory Snapshot	<a href="#">RUN</a>
Housing Inventory Snapshot by Property Manager	<a href="#">RUN</a>
Housing Inventory Snapshot for HAT Buildings	<a href="#">RUN</a>
Inactive Units	<a href="#">RUN</a>
Offline Housing Units by Reason	<a href="#">RUN</a>
Properties of Buildings Report	<a href="#">RUN</a>
Properties of Units Report	<a href="#">RUN</a>
PSH Pending Referrals Dashboard	<a href="#">RUN</a>
Vacancy Duration of PSH Units	<a href="#">RUN</a>

# 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

Is this housing or shelter/navigation center?  Program Name  Current Availability  Building Name \*  Building Status

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 Name	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](mailto: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!

