



ONE System Scattered-Site Services Monitoring Report

The Services Monitoring Report (SMR) offers centralized, real-time data to confirm assessments, service documentation, and overall program compliance. The SMR should be used routinely to track service trends, ensure timely completion of Housing Support Plans, and identify documentation issues early.

Instructions

1. Log on to the ONE system.
2. Click the launchpad (waffle) in the top right corner of the screen.
3. Select the icon titled, "Reports" in the drop-down menu.
4. Select "Data Analysis" tab on the left-hand side of the screen below Agency Name.
5. Click the down arrow on the right-hand side of the section titled "San Francisco ONE System Reports".
6. Under "Scattered-Site Housing" section, locate the "Services Monitoring Report for Scattered Site Housing". Select "Run" to open the report.
7. Using the Agency Name filter, select an Agency.
8. Using the Program Name filter, select programs to be viewed in the report. ("Is any value" will show all programs)
9. Click the update button (blue circular arrow in upper right corner) to show most accurate program data.
10. Correct client data entry errors by updating services in their profile. This can be achieved by selecting the hyperlink under "Link to ONE Profile" next to client's "Unique Identifier" in each tile.

When to Use

Bi-Weekly Review: Review SMR data at least every to ensure real-time accuracy and catch documentation gaps early.

Monthly Pull Deadline: The full SMR data set must be run no later than the 30th of each month.

Correction Deadline: All missing documentation entries identified in the monthly pull must be completed and entered in the ONE System by the 7th of the following month.

Service Tiles and Usage

Tile 1: Clients Without Any Services Ever identifies clients missing service documentation, or Housing Support Plans, or those with gaps in care coordination. Review each client's record and enter services provided or outreach attempts per HSH guidance.

Tile 2: Count of Services by Client Over the Last 3 Months. Identifies clients who receive regular support and clients with zero documented services in the past two months (highlighted in red). Review clients with zero counts of services (highlighted red) to assess if additional outreach or documentation is needed. Those with missing Housing Support Plan dates should have care plans updated per HSH guidance.

Tile 3: Individual Client Services identifies service data errors such as undocumented or duplicate service entries for each client. Review and verify the accuracy of service types, dates, and associated expense amounts. Correct any service entry errors and request that Bitfocus permanently remove duplicates from the ONE System.

