



ONE System Toolkit for Scattered Site Programs

This toolkit can be used as a guide for the entire housing referral workflow for staff who work in scattered site housing programs. Each task has its own tip sheet with step-by-step instructions. There are also some additional topics and resources to support your work.

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Referral Workflow

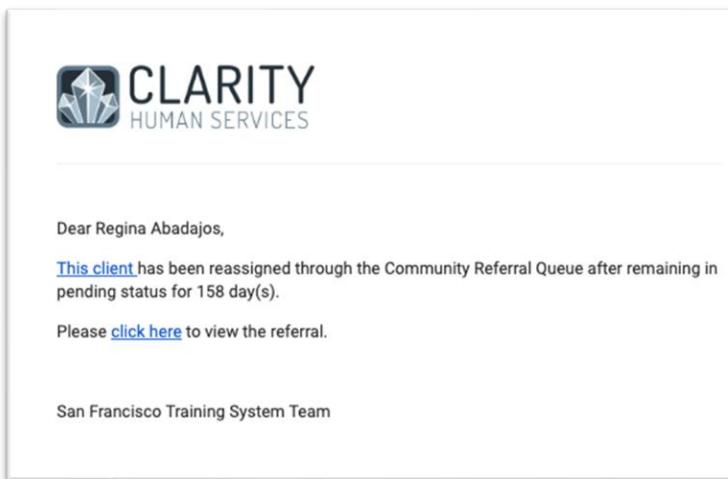
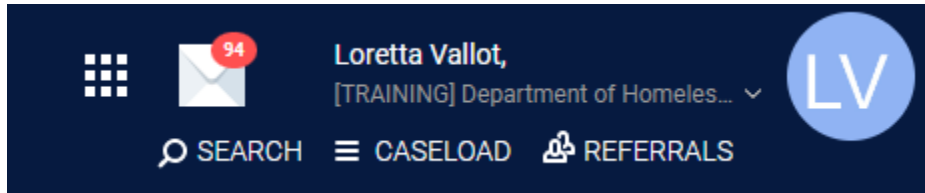
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Processing and Accepting Referrals

The first step of accepting a new household to your program is to process the referral. You will receive an automatic notification via email and in your Clarity inbox when a referral has been sent to a program.



Referrals are processed from **REFERRALS** dashboard on the homepage. Referrals will be editable through the **Pending** tab.

REFERRALS				
Dashboard Pending Community Queue Analysis Completed Denied Sent Availability Open Units				
Pending Referrals				
Search		Mode	Standard	▼
Sort By	Default	Characteristic	-- Select --	▼
☐ Eligible Clients Only		SEARCH		
Client	Referral Date	Qualified	Days Pending	
Tina Test1 Program: HSH Staff Test Program - HSH Funding Referred by: [TRAINING] Department of Homelessness and Supportive Housing	03/23/2023	No	166 total 166 pending	
Jane Doe Program: Camelot Hotel - GF Referred by: [TRAINING] Department of Homelessness and Supportive Housing	04/04/2023	Reassigned	154 total 154 pending	
Problem Solving Queen Program: Camelot Hotel - GF Referred by: [TRAINING] Department of Homelessness and Supportive Housing	 04/07/2023	Reassigned	151 total 151 pending	



To acknowledge the referral and mark it received, the status in ONE needs to be changed from **Pending** to **Pending - In Process**. This task is usually completed by service providers. This will notify other users, including Access Point staff and HSH staff, that the referral has been received and is in process. If the referral is not changed to Pending - In Process, the referral will automatically expire after 180 days, and the client will be sent back to the Community Queue.

REFERRAL: EDIT

Client	Samuel Test
Referred Program	BVHP-Rapid Rehousing-Prop C
Referred to Agency	[TRAINING] Bayview Hunters Point Foundation for Community Improvement
Referring Agency	[TRAINING] San Francisco Adult Coordinated Entry Agency
Referred Date	05/01/2023 4:18 PM
Days Pending	0 day(s)
In Process	0 day(s)
Qualified	Reassigned
Adult Priority score	99
Referred by Staff	Holly Aversano ⓘ
Case Manager	Select ▼
Last Activity	05/01/2023 CHECK-IN
Status	✓ Pending Pending - In Process Denied Expired
Private	

SAVE CHANGES
CANCEL

The display color of the referral will change to green when status is changed to **Pending - In Process**:

Samuel Test

Program: BVHP-Rapid Rehousing-Prop C

Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency ⓘ



Denying Referrals

When you need to deny a referral, change the status of the referral to **Denied**. Four additional fields will populate that need to be answered to identify the denial reason.

The screenshot displays a web form for denying referrals. At the top, the 'Status' dropdown menu is set to 'Denied'. Below this, a red rectangular box highlights four fields that must be completed: 'Send to Community Queue' (a dropdown menu showing '-- Select --'), 'Denied By Type' (a dropdown menu showing '-- Select --'), 'Denied Reason' (a dropdown menu showing 'Select'), and 'Denial Information' (a text input area). Below the red box is a 'Private' toggle switch, which is currently turned off. At the bottom of the form are two buttons: 'SAVE CHANGES' and 'CANCEL'.

Program Enrollments

Once the household has agreed to be a part of the program, the next step is to enroll the household in the program. Enrolling a client into your program accepts the Community Queue referral. Click the **PROGRAMS** tab and find the program that the household was referred to. There should be an orange box identifying that there is a pending referral to this program. Ensure the toggle that says “Program Placement is the result of Referral” is on.

If there are other members in the household, include those household members who are moving in by toggling their names ON. Doing so is essential to ensuring that the household can be placed in a unit together. This task is usually completed by the service provider.

Samuel Test

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

CLIENT PROFILE

BVHP-Rapid Rehousing-Prop C

Program Description:
Adult households reside in a unit in the private rental market. This is a temporary subsidy, up to two years. Household rent contributions will increase over time. The household is expected to take over the entire rental amount at the end of subsidy term.

Active Clients

3 CLIENTS

0 % Families
100 % Individuals

Occupancy (Today)

3 UNITS

9 % Checked In
0 % Reserved
91 % Available

Referrals (90 Days)

1 REFERRAL

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

Funding Source
Local or Other Funding Source

Availability
Full Availability

Service Categories:
☒ Case Management
☒ RETIRED (Coordinated Entry Event)
☒ Housing Search and Placement
☒ Other

HOUSING AVAILABILITY:

Households without children 35 Beds in 35 Units

☒ Program Placement a result of Referral provided by [TRAINING] San Francisco Adult Coordinated Entry Agency

1 pending referral(s). Oldest 0 days.

PRINT DIRECTIONS

ENROLL

The project start date is the date the household begins housing navigation services. Leave the housing move-in date blank until the household successfully moves into their unit.



Samuel Test

[PROFILE](#)
[HISTORY](#)
[SERVICES](#)
[PROGRAMS](#)
[ASSESSMENTS](#)
[NOTES](#)
[FILES](#)
[CONTACT](#)
[LOCATION](#)
[REFERRALS](#)

Enroll 'BVHP-Rapid Rehousing-Prop C' program for client Samuel Test

Program Date

05/01/2023

HOUSING LOCATION INFORMATION

Housing Location Provider

Select

CASE MANAGEMENT INFORMATION

Case Management Provider

Select

Case Management Status

Select

COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date

Unit Number

Address

City

Zipcode

Is this a shared housing destination?

PRIOR LIVING SITUATION

Type of Residence

Place not meant for habitation (e.g., a vehicle, an abandoned building, bu

Length of Stay in Prior Living Situation

One night or Less

Approximate Date Homelessness Started

03/10/2023

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

One Time

When enrolling a client, please keep in mind that client information may cascade forward from other program enrollments, which assists in data entry by autofilling the fields. It is important to always confirm that all details are still up to date and accurate. Update information as necessary.



Housing Move-In Date

When a household moves into their unit, record the move-in date in ONE. This task is usually completed by the housing locator.

1. Click on **PROGRAMS** tab
2. Click on the pencil icon to open the program
3. Click the **Enrollment** tab
4. Update housing move-in date, address, and shared housing toggle (if applicable)
5. Scroll down and click **SAVE & CLOSE** to save changes

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

Enrollment History Assessments Notes Files Forms

Enroll Program for client Lo California

Program Date 04/30/2025

TRANSLATION ASSISTANCE NEEDED

Translation Assistance Needed No

HOUSING LOCATION INFORMATION

Housing Location Provider Compass Family Services

CASE MANAGEMENT INFORMATION

Case Management Provider Compass Family Services

Case Management Status Receiving Case Management

COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date 04/23/2026

Unit Number 3

Address 1234 Fifth Street

City San Francisco

Zip code 94501

SAVE & CLOSE CANCEL



Services

Outreach services are universal across scattered sites programs.

- Use **Housing Search** to show that your program is working to outreach a client for initial contact, or that you are supporting the client through search of a home in the private rental market.
- Use **Housing Search Hold** when a referral is in the housing search process and encounters barriers to housing that places the housing search process on hold.

Use the following steps 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 and write note
5. Click SUBMIT

The screenshot displays the 'Provide Services' tab in the ONE System Toolkit. The interface includes a top navigation bar with tabs: Enrollment, History, **Provide Services** (highlighted), Events, Assessments, Notes, Files, and Forms. Below the navigation bar, the 'Services' section is visible. Under 'Housing Search', there are two options: 'Housing Search' and 'Housing Search Hold'. The 'Housing Search Hold' option is selected, and a green box labeled 'Service Name' points to it. The 'Housing Search Hold' form is displayed, showing an 'Event Date' of 05/01/2023 and a 'Service Note' field. The 'SUBMIT' button is highlighted in a green box.

Program Exits

When a household leaves your program, record the exit in ONE. Be sure to select any additional household members, by toggling the household member ON, who also need to be exited from the program. This task is usually completed by the service provider.

1. Click on **PROGRAMS** tab
2. Click on the pencil icon to open the program
3. Click the **Exit** button in the top right-hand corner
4. Review the prepopulated information for accuracy
5. Scroll down and click **SAVE & CLOSE** to save changes

The screenshot displays the ONE System interface for a user named Samuel Test. The top navigation bar includes tabs for PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. The PROGRAMS tab is selected, showing the program name: PROGRAM: BVHP-RAPID REHOUSING-PROP C. Below this, there is a sub-navigation bar with tabs for Enrollment, History, Provide Services, Events, Assessments, Notes, Files, and Forms. The History tab is selected. In the top right corner of the main content area, there is a button labeled 'Exit' with a close icon, which is highlighted by a green rectangular box. Below the navigation bar, the section 'Program Service History' is visible, featuring a table with columns for Service Name, Start Date, and End Date. The table contains one entry: 'Referral: BVHP-Rapid Rehousing-Prop C [TRAINING] San Francisco Adult Coordinated Entry Agency referral to [TRAINING] Bayview Hunters Point Foundation for Community Improvement', with a start date of 05/01/2023 and an end date of 05/01/2023. A legend at the bottom indicates that 'Reservation' is represented by a yellow square, 'Service' by a white square, and 'Referral' by a blue square.

Service Name	Start Date	End Date
Referral: BVHP-Rapid Rehousing-Prop C [TRAINING] San Francisco Adult Coordinated Entry Agency referral to [TRAINING] Bayview Hunters Point Foundation for Community Improvement	05/01/2023	05/01/2023

LINK FROM HISTORY

☐ Reservation ☐ Service ☒ Referral



Returns to Housing Search (Rehousing)

If a household returns to housing search in a scattered site housing program and leaves their current unit, they must be exited from their existing program stay and immediately re-enrolled to reflect their accurate living situation.

1. Returning to Housing Search

- The household must be exited from their existing scattered sites program prior to their stay in their temporary housing situation.
 - The **Program Exit Date** should be the date when they moved out of their scattered sites unit.

PROGRAM: UNITY CARE - FLEXIBLE HOUSING SUBSIDY POOL - PROP C

Enrollment History Provide Services Assessments Notes Files Forms X Exit

End Program for client California Lo

Program Exit Date: 10/01/2025

Destination: Emergency shelter, including hotel or motel paid for with emergency shelter

Exit Reason: Exit by client choice

DISABLING CONDITIONS AND BARRIERS

Physical Disability: No

Developmental Disability: No

Chronic Health Condition: No

HIV - AIDS: No

Mental Health Disorder: Yes Long Term: Yes

Substance Use Disorder: Both alcohol Long Term: Yes

EMPLOYMENT STATUS

Employed: Yes

Type of Employment: Full-time

Ensure the Exit Destination and Exit Reason are accurate.

All information cascades from previous program enrollments or last annual assessment—update all information as necessary.

2. Re-Enrollment in Scattered Site Housing Program

- The household is re-enrolled in the same scattered sites housing program.
 - Immediately re-enroll the household in the same scattered sites housing program, with **Program Start Date** being the same date the household enrolled in the temporary housing program/intervention.
 - This should be the same date the household was exited from the initial scattered site housing program.

Enroll 'Unity Care - Flexible Housing Subsidy Pool - Prop C' program for client California Lo

Program Date: 10/01/2025

TRANSLATION ASSISTANCE NEEDED

Translation Assistance Needed: No

HOUSING LOCATION INFORMATION

Housing Location Provider: Brilliant Corners

CASE MANAGEMENT INFORMATION

Case Management Provider: Unity Care

Case Management Status: Receiving Case Management

COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date: / /

Unit Number:

Address:

City:

Zip code:

Leave Move-In Date and Address Information blank until household moves into their new unit.



3. Prior Living Situation

- All fields on the Enrollment page will cascade from previous exit information.
- All households re-enrolled in their scattered sites housing program should have their **Type of Residence** be “Rental by Client, with ongoing housing subsidy”.
 - The **Rental Subsidy Type** should identify what subsidy the household utilizes (Rental by client, with other ongoing subsidy, RRH, etc).

PRIOR LIVING SITUATION	
Type of Residence	Rental by client, with ongoing housing subsidy ▼
Rental Subsidy Type	Rental by client, with other ongoing housing subsidy ▼
Length of Stay in Prior Living Situation	90 days or more, but less than one year ▼
Length of Stay Less Than 7 Nights	No ▼

4. New Move-In Information

- Once a household moves into their new unit, enter the new housing move-in date and address information for the household.

COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT	
Housing Move-In Date	11/04/2025 
Unit Number	2
Address	2800 Iceman
City	Oakland
Zip code	94606

5. Multiple Program Enrollments

- Under the **PROGRAMS** tab, there will be multiple enrollments for the same housing program.
- Each time a household returns to housing search, follow the new workflow.

California Lo			
PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES REFERRALS CONTACT LOCATION			
PROGRAM HISTORY			
Program Name	Start Date	End Date	Type
Lower Point TAY Navigation Center - HHAP+GF+ERAF Emergency Shelter - Entry Exit TRAIN - 3rd Street Youth Center and Clinic	10/01/2025	Active	Individual
Unity Care - Flexible Housing Subsidy Pool - Prop C PH - Housing with Services (no disability required for entry) TRAIN - Unity Care	10/01/2025	Active	Individual
Unity Care - Flexible Housing Subsidy Pool - Prop C PH - Housing with Services (no disability required for entry) TRAIN - Unity Care	10/01/2024	10/01/2025	Individual

Note one program enrollment has an end date and the new enrollment is now active with a new program start date.



Annual Assessments

Complete annual assessments yearly to update client information that may have changed since enrollment. This task is to be done by the service provider:

1. Click **PROGRAMS** tab
2. Click on the pencil icon to open the program
3. Click on the **Assessments** tab
4. Click the **START** button on the Annual Assessment
5. Update information in the assessment
6. Click **SAVE & CLOSE** at the bottom of the assessment to save

Samuel Test

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

Emergency Shelter - Entry Exit United Living International 05/01/2023 Active Individual

Verona - GF PH - Housing with Services (no disability required for entry) 04/05/2023 04/05/2023 Individual [TRAINING] Abode Services

BVHP-Rapid Rehousing-Prop C PH - Rapid Re-Housing 04/01/2023 Active Individual [TRAINING] Bayview Hunters Point Foundation for Community Improvement

Samuel Test

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

PROGRAM: BVHP-RAPID REHOUSING-PROP C

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

Assessments LINK FROM ASSESSMENTS

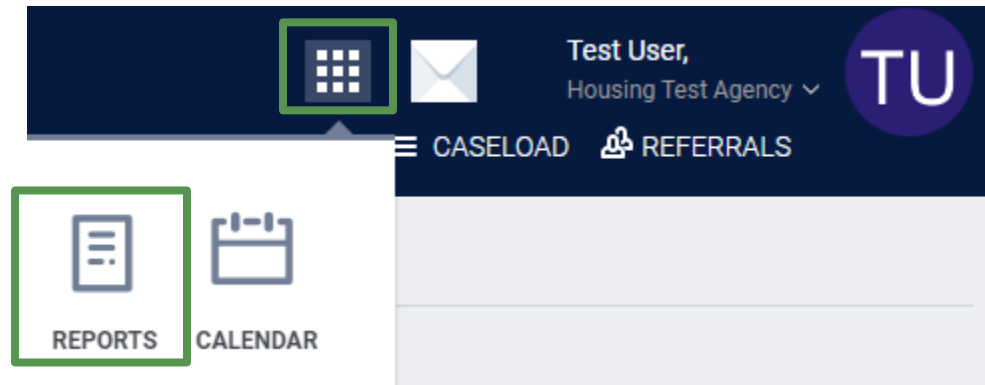
Status Update Assessment START

Annual Assessment START



Report Library

For providers serving our unhoused and housed neighbors, some reports in the Report Library can ensure data quality being present, consistent, accurate, and timely. Both service providers and housing locators are responsible for ensuring the data in ONE is accurate. Although it may not be immediately visible in the day-to-day workflow, data quality impacts the effectiveness of the Homelessness Response System's work in many ways. When we do not have timely, high-quality data in ONE, it hinders HSH and the Homeless Response System's ability to serve clients equitably and effectively. The Program Roster is a highly used report for scattered site programs to ensure accurate data quality.



Demo Agency	
REPORT LIBRARY	EXPLORE DATA ANALYSIS
REPORT LIBRARY	
Favorite Reports	4 report(s) ▼
Data Quality Reports	6 report(s) ▼
Administrator Reports	19 report(s) ▼
Service Based Reports	13 report(s) ▼
Program Based Reports	19 report(s) ▼
Assessment Based Reports	4 report(s) ▼
Profile Screen Reports	1 report(s) ▼
Housing	5 report(s) ▼
HUD Reports	7 report(s) ▼
Community and Referrals	8 report(s) ▼
Agency Management	4 report(s) ▼



Program Roster Report										Demo Agency			
Active within [12/01/2019 - 11/30/2020]													
Housing Move-in: Undefined = Unknown HoH or Move-in is Null, ☐ = Non PH Project, A: Assessments, S: Services, CN: Case Notes													
Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff	
Program: Arches Navigation Center													
Fever, Cedar	F32DE8A0A	11/30/1999	20	21	01/21/2020	-	0		0	0	0	S. Hoffman	
												Number of Clients: 1	
												Number of Households: 1	
Program: Coordinated Entry Access Point													
Canyon, Bryce	AAFEF1344	09/12/1979	40	41	01/02/2020	-	334		0	0	0	S. Hoffman	
												Number of Clients: 1	
												Number of Households: 1	
Program: Street Outreach Program													
Bend, Big	FBD52A648	10/07/1976	42	44	12/29/2018	-	703		0	0	0	S. Hoffman	
Jonez, Maroon	F3670B32B	01/12/1965	55	55	02/06/2020	-	299		0	0	0	S. Jones*	
												Number of Clients: 2	
												Number of Households: 2	
Program: Zion Housing													
Mouse, Malia	33347CB86	01/02/2018	1	2	02/01/2019	-	669	undefined	0	0	0	S. Jones*	
Mouse, Minnie	471CA3370	01/25/1985	33	35	11/11/2018	-	751	11/11/2018	0	1	0	S. Jones*	
Tree, Pine	61F0D4B00	06/04/2011	9	9	06/25/2020	-	159	undefined	0	0	0	S. Hoffman	
Canyon, Bryce	AAFEF1344	09/12/1979	41	41	10/08/2020	10/08/2020	0	10/08/2020	1	1	0	G. Demo	
Tree - do Not Use, Evergreen	76764A8E7	07/01/1988	32	32	10/26/2020	-	36	10/26/2020	0	0	0	S. Hoffman	
												Number of Clients: 5	
												Number of Households: 5	
												Total Number of Clients: 10	
												Total Number of Households: 10	
denotes Inactive Assigned Staff													
Program Name								Project Type					
Arches Navigation Center								Emergency Shelter					
Coordinated Entry Access Point								Coordinated Entry					
Street Outreach Program								Street Outreach					
Zion Housing								PH - Permanent Supportive Housing (disability required)					

Troubleshooting Tips

- If a household does not appear on the program roster report, they need to be enrolled in the program.
- If you see 'undefined' in the move-in date column next to a HoH member on the roster and you know the client has moved into their unit, the enrollment must be linked to the enrollment.

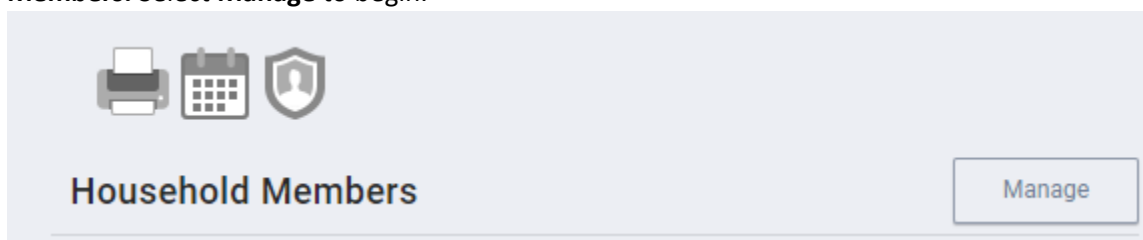
You have access to many reports in ONE that can help provide a bigger picture of the work being done in San Francisco's Homeless Response System. Feel free to download and explore any report you have access to that interests you and helps you understand your work better.



Managing Households

Both housing locators and service providers are responsible for ensuring households are appropriately managed in ONE. Households need to be correctly connected and associated in ONE to ensure data is accurate and households are joined in program enrollments. Household composition is defined by the client. Anyone who will be residing in the same unit should be associated in the same household. Below are the step-by-step instructions on managing households in ONE:

1. Households need to first be connected at the profile level. If a household member has never been entered in the ONE System, they would need a new profile created. First verify that they are not in the system before completing a new profile.
 - a. New members can be added at the right of the client's profile screen, under **Household Members**. Select **Manage** to begin.



- b. Enter the name of the additional household member into the search bar. Verify you have found the correct person using the date of birth or last four of their SSN, and hover over their name to display the Add button. Select **Add**.

HOUSEHOLD MANAGEMENT

Search for a Household Member

Jane Doe 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
Jane Doe Existing Group, Head of Household: Brian Smith, Members: 2	04/25/1983	0000	12/14/2021
Jane Doe	01/01/1947	6789	04/28/2023
+ Add Jane Doe10	12/01/1986	3456	08/29/2023

- c. A window will pop up that allows you to select the relationship and the date that the additional household member joined the household. This date should be on or before the date that the household moves into the unit.



ADD TO HOUSEHOLD

Member Type

Not Set

Start Date

09/27/2023

SAVE

- d. Once complete, the household members will be listed on the right side of either client's profile. The individual with the star is designated as the Head of Household (HoH). You can then edit the head of household's relationship.

Household Members	
Lo California	Niece ★
Jane Doe10	Aunt

2. Clients also need to be connected as a household when enrolling into a program.

- a. When completing an enrollment, find the section that says "include Group Members". Toggle this ON for any members of the household that will also be living at this site.

Include group members:

☒ Jane Doe10

- b. When enrolling, an enrollment screen will appear for each household member. The relationship to the Head of Household must be designated for each household member. The Head of Household should be the individual with the primary eligibility for the program. If the eligible person was not already set as the Head of Household at the client profile level, edit the household to reflect appropriate Head of Household.

Enroll 'Abode Services - Flexible Housing Subsidy Pool Over 60 - Prop C' program for client Jane Doe10

Program Date

09/27/2023

Relationship to Head of Household

Select

Select

Head of household's child

Head of household's spouse or partner

Head of Household's other relation member (other relation to Head of Household)

Other: non-relation member

HOUSING LOCATION INFORMATION

Housing Location Provider



3. If a household member moves in after the head of household, they should be added to the enrollment, rather than enrolled separately.

- a. Open the head of household's program enrollment, and look for Program Group Members on the right side of the screen. Select **(+) Add** to add in other household members.
- b. A pop-up window will appear with all household members listed. Toggle ON those you wish to add to the enrollments. Anyone who will be residing in the unit should be included in the enrollment.

ENROLL ADDITIONAL MEMBERS
✕

☐

Jane Doe10

Aunt

ENROLL

Loretta Vallot,
 [TRAINING] Department of Homeles...

LV

SEARCH

CASELOAD

2
DAYS
ACTIVE PROGRAM

Program Type:
Individual

Program Start Date:
09/27/2023

Assigned Staff:
Loretta Vallot

Head of Household:
Lo California

Program Group Members
+ Add

No active members

- c. Select **ENROLL**, which will prompt you to complete the enrollment screen for the additional household member(s). Once completed, household members will show in the right-hand column under **Program Group Members** for the original enrollee.

2
DAYS
ACTIVE PROGRAM

Program Type:
Group (2)

Program Start Date:
09/27/2023

Assigned Staff:
Loretta Vallot

Head of Household:
Lo California

Program Group Members

Jane Doe10	09/29/2023	Active
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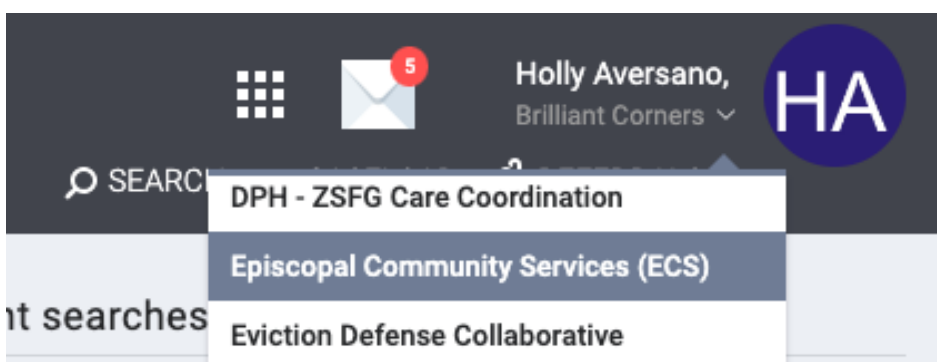


Switching Between Agencies

Programs in ONE are organized under agencies, which primarily correspond with provider organizations.

You may need to switch agencies to enroll a client into a program and/or edit a client's enrollment in ONE (including entering move-in information). You can switch your active agency by simply clicking on the agency toggle underneath your name in the top right-hand corner of your screen and selecting a different agency.

When you are in ONE, the agency that is listed under your name in the top right corner is the agency that you are currently viewing and working under. You will be able to access different programs and services depending on the agency you are currently working in.

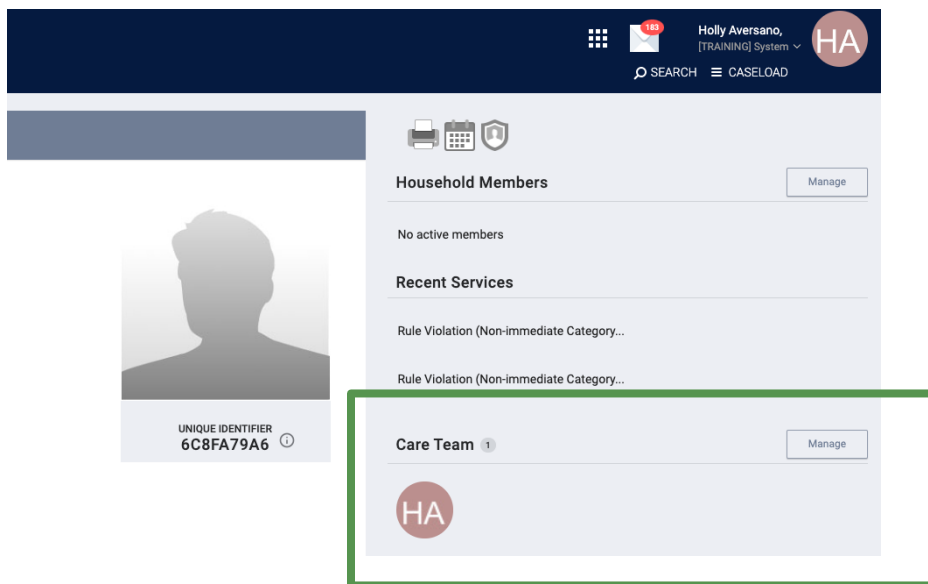


Care Team Members

Care Team members are assigned staff in the system that are involved with a client's care. All Care Team members are other ONE System users. A user can become assigned to a client's Care Team in one of the following ways:

- Through a program enrollment
- By being manually assigned as a case manager
- By being assigned as a client's navigator

From the client Profile page, you can access the Care Team on the right-hand side of the screen. From there, you can manage who appears on the Care Team by selecting the **Manage** button next to the Care Team section.



From the Care Team Management screen, you will be able to view active and inactive Care Team members, as well as add new Care Team members to the client's profile.

- To add a new Care Team member, select the **Add Care Team Member** button.

CARE TEAM MANAGEMENT

ADD CARE TEAM MEMBER +

Active Care Team

Care Team Member	Type	Start Date	End Date
Holly Aversano [TRAINING] San Francisco Housing Authority	Enrollment	03/30/2022	

Inactive Care Team

Care Team Member	Type	Start Date	End Date
Holly Aversano [TRAINING] HSH: SFHOT	Enrollment	2022	2023



Next, a pop-up screen will allow you to begin to assign a new Care Team member.

- Select the drop-down arrow to select from the list of staff. This will show you users within your agency.
- Enter the date the Care Team member was assigned to the client in the **Start Date** field.
- Select **ADD** to save the record.
- To remove a Care Team member, simply update the **End Date** field with the date the Care Team member stopped working with the client, and select **UPDATE**.

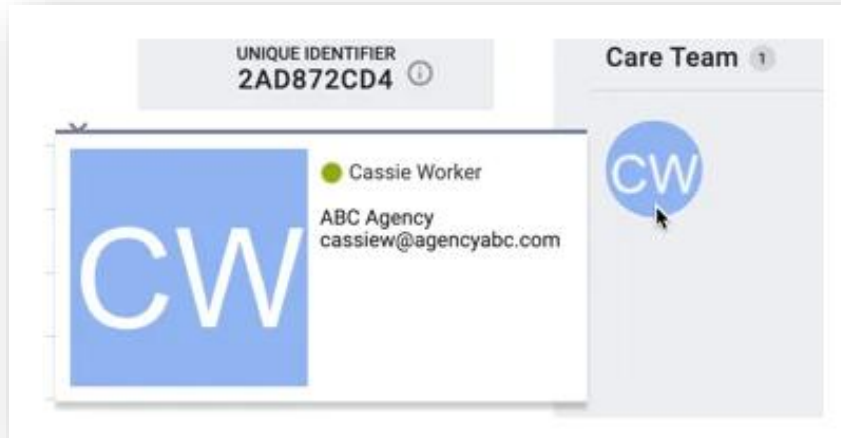
Keep the Public toggle ON as shown in the example above. You should avoid marking the Care Team member as private (unless you are required to do so) as it prohibits information from being shared across the system.

You are also able to change the Assigned Staff from within the program enrollment. In the Active Program box on the right side of the screen, select the pencil edit icon next to the **Assigned Staff** name. Then select the new assigned staff member from the drop-down list. You can select multiple staff members by clicking the checkbox next to each name. You can also remove the staff member automatically assigned during enrollment.



Care Team Helpful Hints

By hovering over the Care Team member icon, you are able to view the Care Team member contact information associated with their ONE System account.



On the Care Team Management screen, you are able to view whether the assigned staff were added to the Care Team manually or through an enrollment:

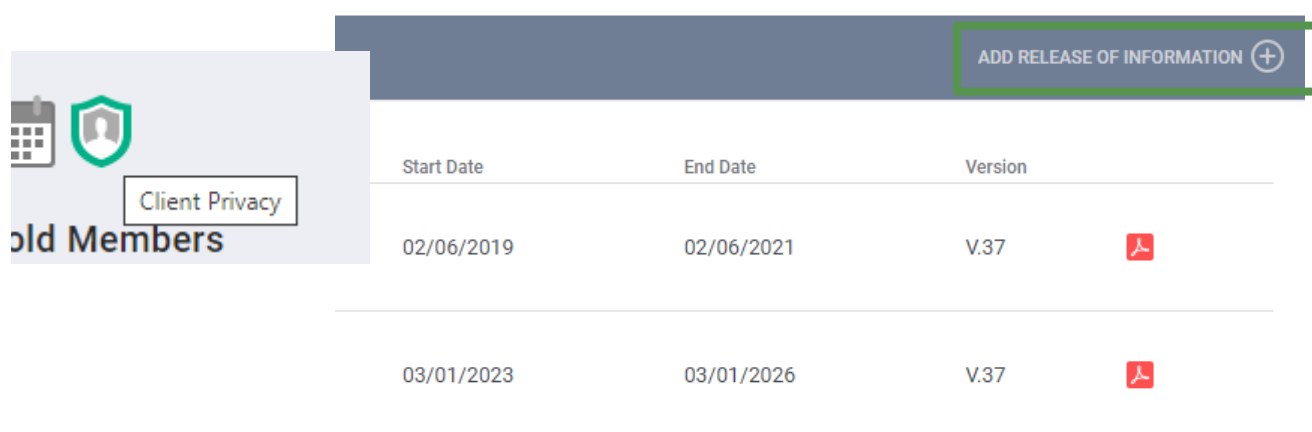
CARE TEAM MANAGEMENT					ADD CARE TEAM MEMBER +	
Active Care Team						
Care Team Member	Type	Start Date	End Date			
Cassie Worker ABC Agency	Enrollment	04/21/2022				

Release of Information (ROI) Management in ONE

ONE will prompt for a Release of Information to be completed when a client profile is created. The ROI must also be updated every three years. Profiles with missing or expired Releases of Information will be flagged with a yellow banner.

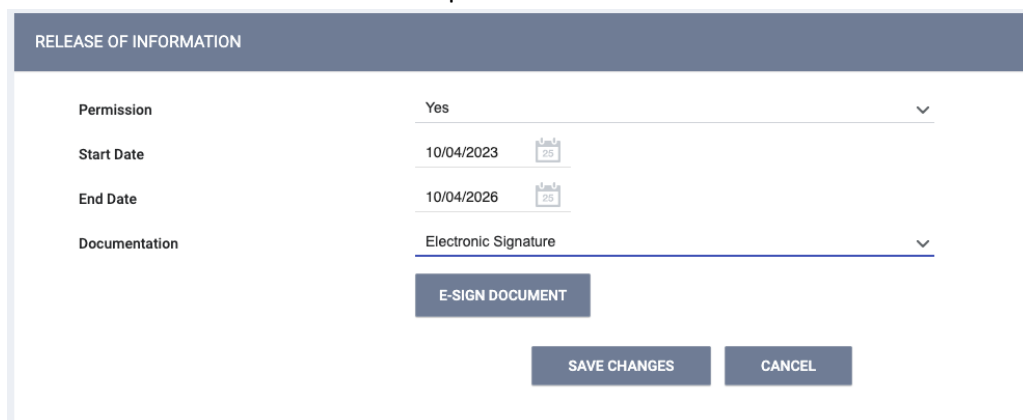
 Release of Information is Missing or Permission Not Provided. Please review to ensure compliance.

To maintain compliance, each client profile must have an up-to-date and active ROI recorded in the **Client Privacy** section of client profile.



Start Date	End Date	Version
02/06/2019	02/06/2021	V.37
03/01/2023	03/01/2026	V.37

- The Start Date defaults to today and the End Date defaults to three years from today.
- Options for Electronic Signature or PDF Upload
 - If providing verbal consent, select “Electronic Signature” and check the box indicating the client is providing verbal consent.
- NOTE: The start date for a new ROI cannot overlap with the end date of an old or current ROI



RELEASE OF INFORMATION

Permission: Yes

Start Date: 10/04/2023

End Date: 10/04/2026

Documentation: Electronic Signature

E-SIGN DOCUMENT

SAVE CHANGES **CANCEL**

Resources

As a provider, you have access to the Bitfocus Help Desk to answer any questions, as well as correct any errors made in the system. Here are the three ways to get support through the Bitfocus Help Desk:

1. Bitfocus Help Desk
onesf@bitfocus.com
415.429.4211
2. ONESF Help Center Website
<https://onesf.bitfocus.com/>
3. Help Desk Widget (In bottom right corner of ONE System and on ONESF Help Center Website)

