



ONE System Housing Toolkit

Site-Based Permanent Supportive Housing

This toolkit contains tipsheets designed to help you complete your necessary work in the ONE System. You can select individual topics using the table of contents below.

There are additional resources available to you on the [ONE System Help Site](#) and the [Bitfocus Clarity Human Services Help Center](#). This toolkit focuses on the PSH workflow and is not exhaustive, so we encourage you to use these sites for important information on topics like Homelessness Response System [privacy practices](#) and [user access](#).

If you or your supervisor have questions or concerns that are not addressed in this toolkit or either of the linked help sites, please contact the ONE System support team by email at onesf@bitfocus.com or your HSH Program Manager.

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What am I responsible for?

Below are some key ONE System functions, broken out by Support Services and Property Management responsibilities. This is not an exhaustive list, and the division of duties at your site or program might vary from the list below. However, unless you've been instructed otherwise, most programs divide responsibilities in ONE as follows:

Support Services

- Enter program enrollments and ensure correct unit assignment *at move-in*
- Annual assessments
- Exits
- Tracking eviction notices and unlawful detainers served
- Ensuring program rosters are up to date and include all clients in your program(s)

Property Management

- Making units offline and ending offline status when unit becomes available
- Ensuring clients are correctly associated with their current unit
- Regularly monitor your building rosters to ensure accurate occupancy and availability

Be sure to reach out to your supervisor or HSH Program Manager if you have any questions or concerns.

A Note about Inventory

The Inventory functionality in ONE allows for information about specific housing units to be stored in the ONE System. This allows clients to be assigned to a specific unit, unit history to be tracked, and units to be marked offline as needed. Inventory functionality was launched in ONE in 2023 and was a major change to the way programs were managed in the system. Inventory helps to improve efficiency, system-wide visibility, and streamlines the placement of clients into the units that best fit their needs.

The ONE System working smoothly requires property management, support services and coordinated entry to update records in ONE in a timely manner. When a client moves out of a unit, it isn't available for property management to update until the services provider completes the program exit. When an offline status is not ended, the unit is not available for coordinated entry to make a referral.

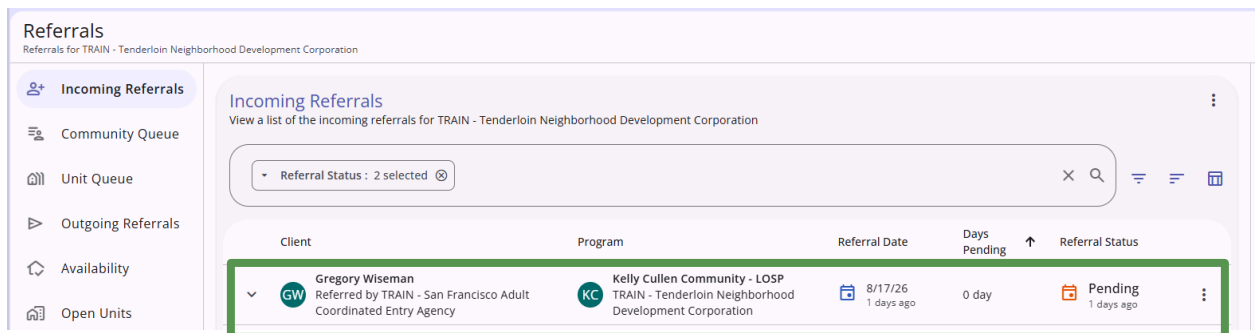
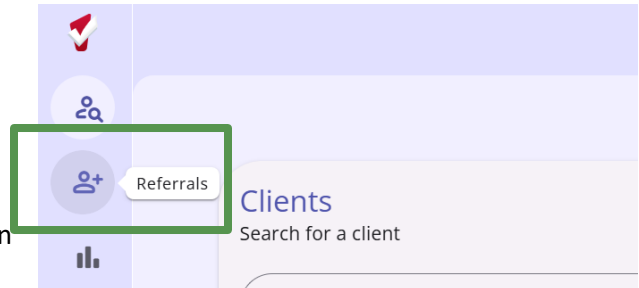
Managing and Changing the Status of Referrals



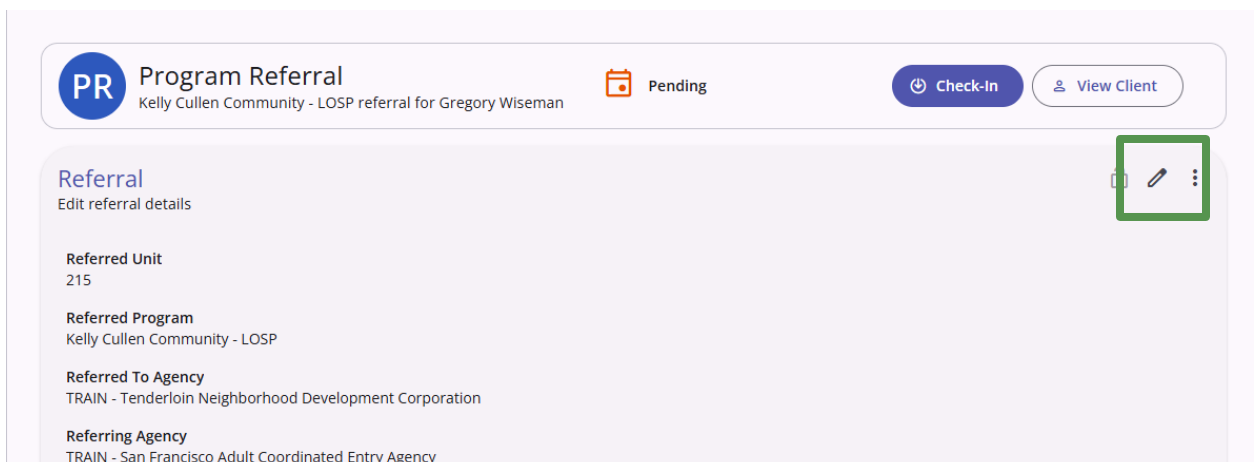
This task is usually completed by **property managers**.

When a referral is made to your program, you must change its status to Pending – In Progress to acknowledge that you have received the referral and it is in process. This “accepts” the referral, ensures it does not expire, and holds the associated unit for the referred client.

1. Select “Referrals” from the primary navigation menu on the left the screen. You can use the double arrows on the bottom of the menu to expand >> or collapse << the labels.
2. The view will default to “Incoming Referrals”. This will show you a list of clients who have been referred to your agency, but have not yet been enrolled into a program. You can search for the name or UID or order the list of clients by client name or program name.



3. Open the referral you’d like to view by clicking the entry with the client’s name.
4. Click the pencil icon in the top right corner of the Referral record to access the Edit Referral screen. Scroll down the Edit Referral screen to **Current Status** and click the drop-down menu. Change the status to **Pending – In Process**. Then click “Save” to save your changes.



Last Activity
8/17/2026

Current Status *

Pending

Pending

Denied

Expired

Pending - In Process

5. Check the **Referred Unit** number. If it is not correct, communicate with the staff member who made the referral so they can deny the referral and make a new referral to the correct unit. See the **Referred by Staff** field if you do not know who made the referral.
6. After saving and confirming, select Incoming Referrals in the menu to return to the list of pending referrals. The referral's status will be updated in the list. You can sort the list of referrals by any of the available fields to assist with your work. Click on the header label for any visible columns to sort by that column. If you'd like to modify the list, use the    buttons next to the search bar to filter, add additional sorting rules, or make additional fields visible.

If you need to deny a referral:

Follow the instructions above, but for step 4, select **Denied** as the status. Once Denied is selected, four additional fields will appear that need to be filled out. Complete as follows:

Denied by Type	Select provider or client
Denied by Reason	Select a reason from the drop-down list
Denial Information	Add notes to explain why the referral was denied. Please be specific to help with future referrals.
Send to Community Queue	If the client is still experiencing homelessness and is housing referral status, select "Yes" to send the client back to the queue.

Once you select "Save" the unit will automatically revert to available status.

Accept and Enroll Client in Program



This task is usually completed by **service providers**.



Enroll a client within three business days of move-in.



Pay attention to following appropriate steps for households.

1. Ensure you are in the correct agency in ONE.
2. Open the client profile and click into programs. Use the plus sign button (+) in the top right corner to add a program enrollment. Under **Available Programs**, click on the appropriate program to expand. You can also access the client record directly from the **Incoming Referrals** section in **Referrals** by clicking on the “View Client” button on the referral.

Gregory Wiseman
You are currently viewing the Client Record pages for Gregory Wiseman.

No Contact Information

Profile
Privacy
Household
History
Programs
Services
Assessments
Units/Beds
Care Team
Notes

Program enrollments
Program enrollment history for Gregory Wiseman

Add program enrollment

1 Select program

Available Programs
Select the program for the enrollment

Name ↑
▼ DH Dalt Hotel - GF + BHSA
▼ DH Dalt Hotel - VASH PBV
▼ Ea Eddy and Taylor - CoC
▼ Ea Eddy and Taylor - HUD PBV
▼ Ea Eddy and Taylor - LOSP
▼ FT Franciscan Towers - CoC Franciscan Towers 2
▼ FT Franciscan Towers Scattered Sites - CoC Franciscan Towers
▼ KC Kelly Cullen Community - HUD PBV
▼ KC Kelly Cullen Community - HUD PBV + BHSA
▼ KC Kelly Cullen Community - LOSP Pending Referral (Referral date: 8/17/2026)

21 - 30 of 34

3. Confirm that there is a pending referral to the program that you select. Click “Next” to move to step 2, which sets the program placement. This screen will confirm the placement is a result of a referral to the unit by the referring agency. If there are additional household members, they will appear on this screen. Be sure to toggle ON all additional household members.

2 Include household members (optional)

Select members (optional)
You can select other household members below to add to the enrollment or just leave this empty and save to continue.

Program Placement a result of Referral to 317 provided by TRAIN - San Francisco Adult Coordinated Entry Agency

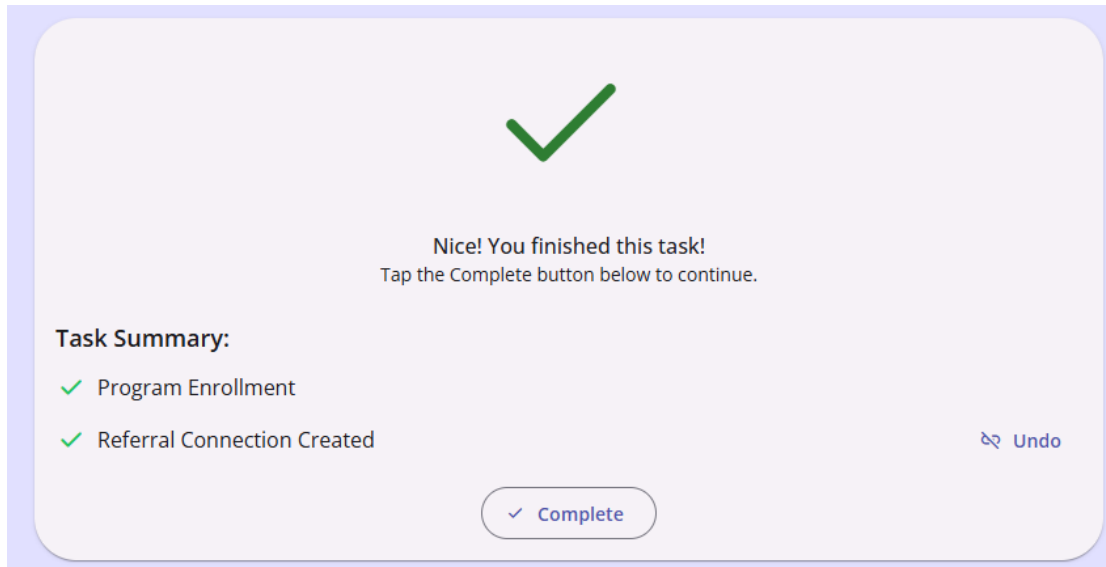
Household Members

Sally Ride

☒ William Ride

Back Next

4. Select “Next” to move to the Program Enrollment entry screen. Complete the enrollment, answering all questions. For a household with multiple individuals, a separate entry screen will appear for each household member.* Be sure to complete the **Relationship to Head of Household** question.
5. Update the **Program Date** to reflect the date the household moved in. Note: the Program Date defaults to the date you are completing the enrollment and will almost always need to be changed. The **Housing Move-In Date** will populate automatically for the head of household and is no longer editable on the **Enrollment** tab when there is a unit referral.
6. Pay special attention to the **Prior Living Situation** fields as these key fields are used for program and systemwide reporting.
7. Ensure the **Unit Number** is correct. If the unit number needs to be updated, follow the instructions for [Transferring a Client to a New Unit](#) which appear later in this Toolkit.
8. When you are done, you will be shown a completion screen, where you can verify that the program enrollment and referral connection was created. Select “Complete” to return to the client profile.



**Please note that only the Head of Household should be assigned to a unit. For any additional household members you are enrolling, you should ignore the banner that appears at the bottom of the enrollment screen:*

A banner with a warning icon (triangle with exclamation mark) and the text: "Please go to the Units/Beds tab to fill out the Initial Occupancy Start Date."

Initial Occupancy Start Date

Date	Time
08/18/2026	12:45 PM

Entering Exits and Exit Reasons for Housing Programs



This task is usually completed by **service providers**.



Update ONE within three business days of a client exit.



Pay attention to following appropriate steps for households.

Exiting a client from the program also exits a client from their assigned unit. It is critical to exit clients from the program and their units so that property management can update the unit status and receive a new referral. All household members should be exited when a client is no longer receiving services from the program.

1. Ensure you are working within the correct agency in ONE.
2. From the client's record, select **Programs** from the client navigation menu, then select the program enrollment. You can also open the program record directly by selecting the client's enrollment from your **Active Enrollments** widget on your home page.

Select **Exit** from the horizontal program menu (on the far right—you might need to scroll). Hit the plus (+) button to add an exit record. Be sure to select any additional household members who also need to be exited from the program and unit. Complete exit screens for all selected household members. Pay close attention to the exit reason and destination, as these key fields are used for program and systemwide reporting.

Sally Ride
You are currently viewing the Client Record pages for Sally Ride (BC848924C).

KC

Kelly Cullen Community - LOSP
 TRAIN - Tenderloin Neighborhood Development Corporation
 PH - Permanent Supportive Housing (disability required for entry)

8/18/26 - Active

8 days ago

Notes

Units/Beds

Files

Forms

Assigned Staff

Exit

History

View a history of interactions during this program enrollment

Program enrollment: Exit

Exit Sally Ride from Kelly Cullen Community - LOSP

Exit program

Exit the program with a new screen.

3. Note: If *only* the head of household has exited, you will need to set a new head of household, assign them to the unit, and enter a housing move in date for them. See [Managing Households](#) for more information.

Add an exit
✕

1 Include household members (optional)

Select members (optional)

You can select other household members below to add to the exit or just leave this empty and save to continue.

Household Members

✓ Jillian Ride

Be sure to select everyone who is exiting the program

Next

- a. Enter the **Program Exit Date**, then select the **Exit Reason** and corresponding **Exit Destination**. If **Eviction** is selected as the **Exit Reason**, you must also complete the **Eviction Reason** field by selecting one of the reasons:
 - Lease Violation
 - Nonpayment of Rent
 - Nonpayment of Rent and Lease Violation

Exit Reason *

Eviction

Eviction Reason *

Select

Select ✓

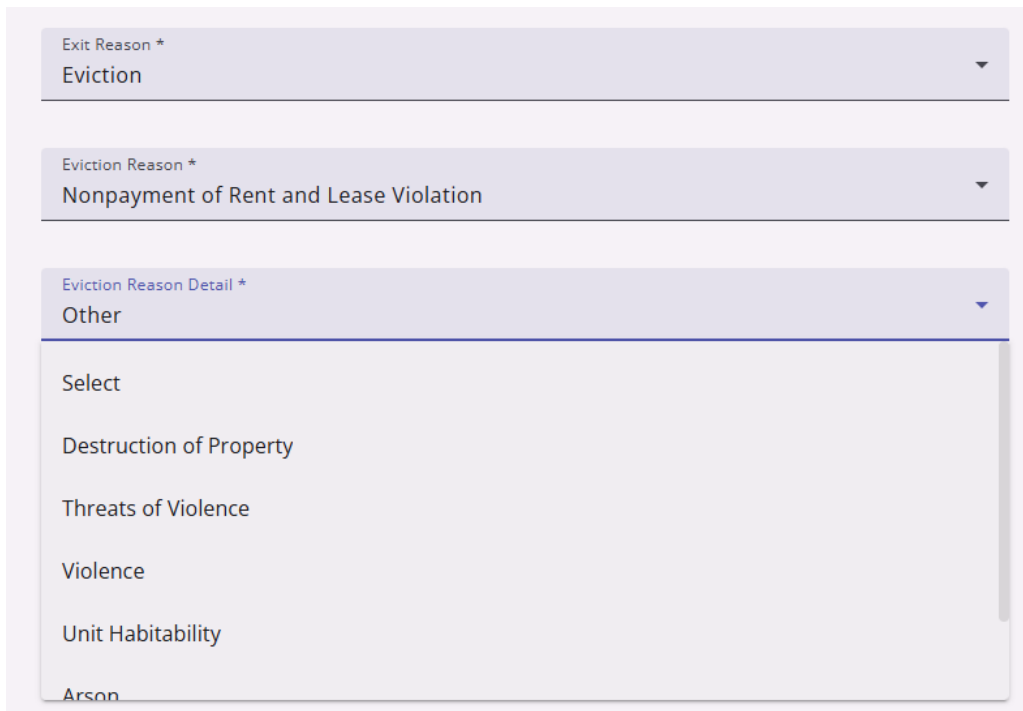
Lease Violation

Nonpayment of Rent

Nonpayment of Rent and Lease Violation

- b. If **Lease Violation** or **Nonpayment of Rent and Lease Violation** is selected as the **Eviction Reason**, you must also complete the **Eviction Reason Detail** field by selecting one of the following:

- Destruction of Property
- Threats of Violence
- Violence
- Unit Habitability
- Arson
- Other (Write In)



The screenshot shows a form with three dropdown menus. The first menu, labeled 'Exit Reason *', has 'Eviction' selected. The second menu, labeled 'Eviction Reason *', has 'Nonpayment of Rent and Lease Violation' selected. The third menu, labeled 'Eviction Reason Detail *', has 'Other' selected, and its dropdown list is open, showing the following options: 'Select', 'Destruction of Property', 'Threats of Violence', 'Violence', 'Unit Habitability', and 'Arson'.

Please ensure these fields are correct as eviction information is reported to the Board of Supervisors annually from the information in ONE. *See the table at the end of this section for a full list of exit reasons and situations where each should be selected.*

4. Complete the remaining fields and click **Save & Close**.

The bottom of the exit screen includes information on the open occupancy and will populate with the exit date and time, which you should leave as the default.

By exiting the client from the program, two additional things will also automatically occur: the client will also be exited from the unit and the unit will be placed offline with reason **Automatically Set to Offline**. Select OK to confirm that the unit will be marked offline as of the program exit date:

At program exit, the unit's offline reason will be **Automatically Set to Offline**, which will allow Property Management to update the unit record with a specific offline reason or to end the offline status to make the unit available to receive a referral. See [Update Units Automatically Set to Offline](#) for more information.

Data Not Collected and Updating Exit Information

Please do not select **Data not collected** unless absolutely necessary. If you obtain missing information after you exit the client, please go back and complete the fields as you receive new information.

To update the exit data after the exit has been completed, open the enrollment and go to the **Exit** screen.

Click on the edit pencil to reopen the exit screen for editing. Update the exit fields with any changes, then click **Save** to update the record.

Exit Reasons

Exit Reason	Use Cases	Additional Fields
Death	Select only the corresponding Exit Destination of “Deceased”	none
Eviction	Select this reason only when the client has been evicted by the Sheriff	Eviction Reason • Nonpayment of Rent • Lease Violation * • Nonpayment of Rent and Lease Violation * * Eviction Reason Detail (enter when Eviction Reason is Lease Violation)
Exit to Institutional Setting	Use <i>only</i> when Exit Destination is one of: • Foster care home or foster care group home • Hospital or other residential non-psychiatric medical facility • Jail, prison or juvenile detention facility • Long-term care facility or nursing home • Psychiatric hospital or other psychiatric facility • Substance abuse treatment facility or detox center	none
Unit Relinquished	Select when the client has voluntarily given up their unit, including when they have transferred to another unit.	none
Unit Abandonment / Client Unseen	Select only when the client has abandoned their unit	none
Other	Select only when none of the other reasons apply AND Select only one of the following corresponding Exit Destinations: • No exit interview completed • Other (note: this should ONLY be used if NO other reason might apply) • Client doesn’t know • Client refused • Data not collected	none

Transferring a Client to a New Unit



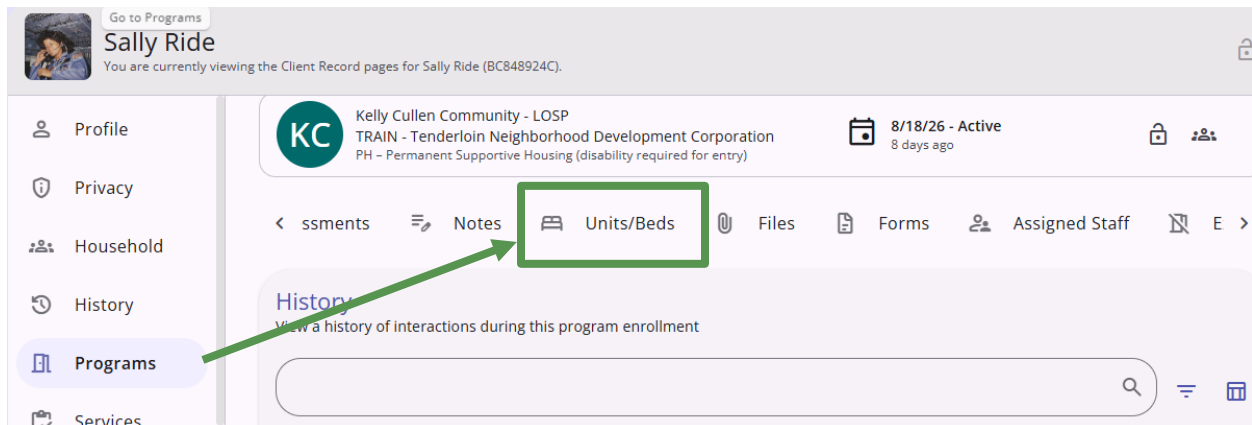
This task is usually completed by *property managers*.

The ONE System should reflect the unit where each client is staying night-by-night, even if it is only on a temporary basis. This section explains how to transfer a client to a new unit in ONE, whether for a temporary or permanent move.

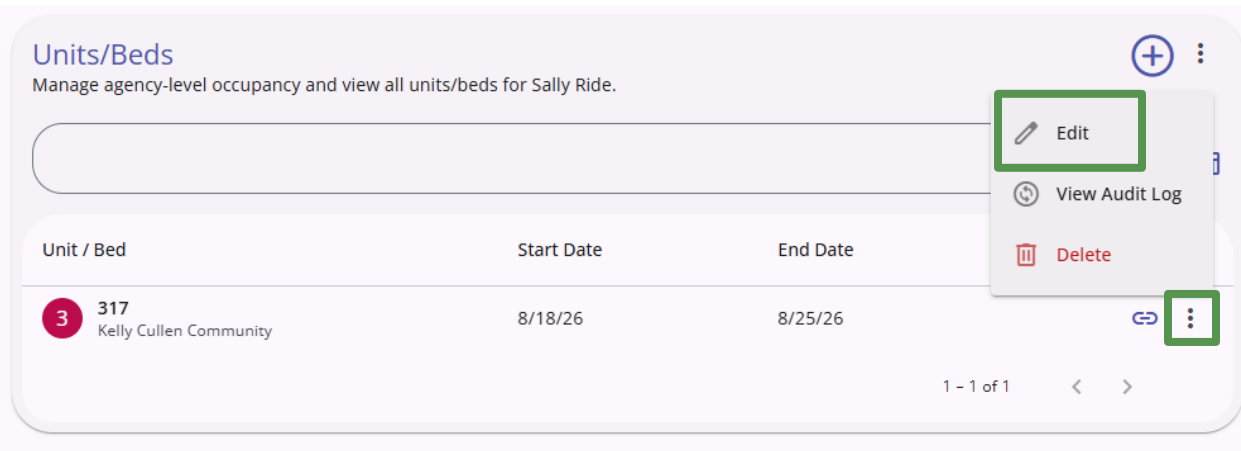
Transferring Clients to a New Unit in the Same Program

If a client has moved to a new unit within the building, you need to update their ONE System record to reflect this. You will also follow these steps if the client is assigned to the incorrect unit at move-in.

1. Within the client's record, select the **Programs** from the client menu. Open the current program, and select the **Units/Beds** tab.



2. In cases where clients need to transfer units, either temporarily or permanently, changes can be made by clicking the three dots to show more actions and selecting "Edit" on the current unit record.



- Open the unit, select the pencil to edit, and enter the end date. The unit will go offline with the reason “Automatically Set to Offline,” so you should either update the offline reason to the actual reason or end the offline status to make the unit available.

- Assign the client to a new unit by selecting the plus (+) button on the right side of the screen.

- In the right-side window, fill in the start date and *leave the end date blank*. Turn on the **Eligibility Override** toggle. Under the **Available Units/Beds**, select the correct unit, and confirm by selecting **Save** to assign the client into their new unit.

If you still do not see the unit, make sure the unit is available.

Be sure to update the automatic offline status that will be created for the newly vacated unit if it is offline **or** update the end date of the automatic offline status if the unit is available for referral.

Note: If a client is moving from a unit in one program to another program with the same provider via an internal transfer, the client must be exited from the current program and enrolled in the new program before the new unit can be assigned.

Transferring Clients to a Unit in a Different Program

If a client is moving to a different program/building, they will need to be exited from the current program and enrolled in their destination program before they can be assigned to their new unit. In these situations, there will not be a referral to the new program/unit.

Support Services

- Exit tenant from current program as of the calendar day before the move and choose the following options for these three fields:
 - Exit Reason: “Unit Relinquished”
 - Destination: “Rental by client, with ongoing housing subsidy”
 - Rental Subsidy Type: “Permanent Supportive Housing”
- Enroll client into the new program as of the date of the move and choose the following options for these two fields:

- a. Prior Living Situation/Type of Residence: "Rental by client, with ongoing housing subsidy"
 - b. Rental Subsidy Type: "Permanent Supportive Housing"
3. You will no longer be able to enter the Housing Move-In Date on the enrollment screen. When Property Management completes the unit assignment, the Housing Move-In Date will automatically populate.

Property Management

1. Ensure the unit the client is transferring into is available by ending an offline status if necessary. Units must be available on or before the date/time you will assign the client to the unit.
2. From the client's profile, open the program enrollment and add the unit assignment to the new unit.
3. Update the automatic offline reason that will be created for the newly vacated unit if it is truly offline or end the automatic offline status by entering an end date if the unit is available. See [Update Units "Automatically Set to Offline"](#).

Updating Unit Status After a Tenant Transfer

When a client moves or transfers from one PSH program to another, it's possible that they will sign a lease before they have relinquished their old unit, or before they have retrieved all their belongings and returned their key. This section outlines how providers should document this situation in ONE.

Exiting Client from the Program

The service provider should exit the tenant from the program as of the day before their enrollment at the new site. See [Entering Exits and Exit Reasons](#).

Updating Unit

The property manager should then:

1. Update the offline reason from **Automatically Set to Offline** to **HSG - Occupied Temporarily by Client from Other Program/Building**. See [Update Units "Automatically Set to Offline"](#).
2. Add the client's name and ONE ID to the unit description field with a brief description of the situation.
3. When the keys are returned and/or the unit is relinquished, the property manager should add a new offline status (likely **HSG/SHLTR - Janitorial/Maintenance** while the unit is turned). The system will ask if you would like to end the former offline status. This will ensure there is no gap between the offline reasons.
4. When the unit is available for a new referral, Property Management can end the offline status and make the unit active.

Offline Reasons

Setting units to offline and ending the offline status to bring those units back to available is an essential part of the housing workflow. Data on the offline reasons is included in reporting and decision-making, so it is important to select the most accurate and appropriate reason when marking a unit offline.

Each offline reason is prefixed by the corresponding program areas where it may be used:

- **HSG** (housing)
- **SHLTR** (shelter)

For any questions not answered in this chart, please contact your supervisor or HSH program manager.

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 by Tenant Whose Subsidy was Terminated	The unit is currently occupied by a tenant who has had their subsidy terminated. This is subject to approval by the HSH Program Manager.	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.	

Set Unit Status to Offline or Back to Available After Being Offline



This task is usually completed by *property managers*.

If a unit needs repairs or other updates before it is ready for a new client or otherwise temporarily unavailable, the unit status can now be set offline in ONE. Any time a unit is unavailable for a client to move in right away, it should be set to offline.

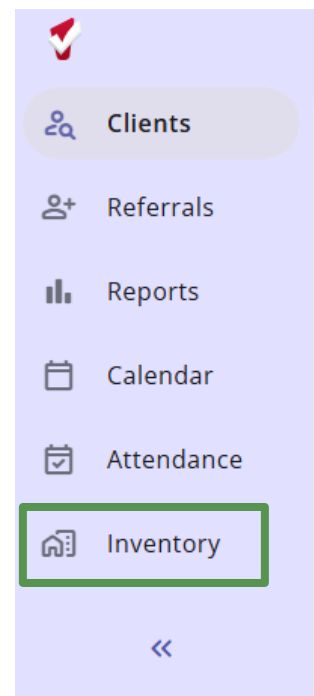
In cases where a client is residing in a unit that needs repairs, the process to [transfer the client](#) should be followed to transfer the client into their temporary unit. The leased unit should be set to offline following the process below. Once repairs are complete, the unit status can be set back to available by adding an end date to the offline status. This will make the unit available, and the client can be transferred back into their original unit in ONE again. If a unit needs to be set to permanently offline, please contact your HSH Program Manager to have the status set to Inactive. *Do not set units to Inactive without contacting HSH.*

Once a unit is Inactive, you will not be able to view the unit unless you run a building roster or the inactive units report. If you accidentally add an Inactive status, contact the Help Desk (onesf@bitfocus.com) to remove it.

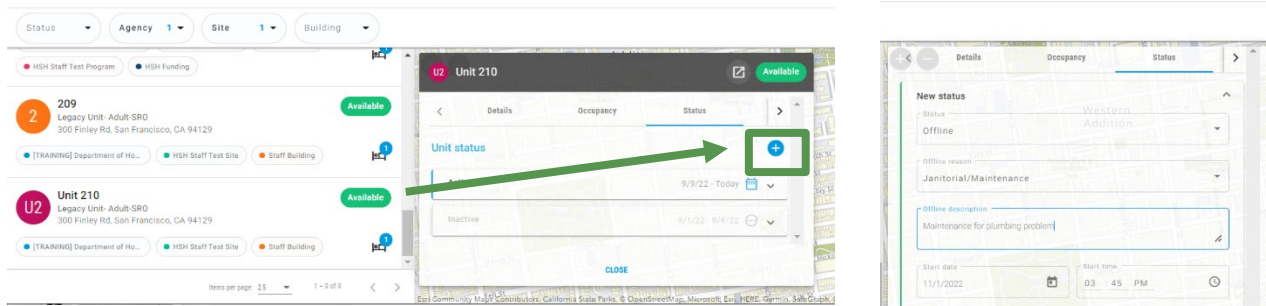
If a unit remains offline but the reason for it being offline changes, a new offline status should be added to ensure the history of the unit is accurately recorded. For example, if a unit is under a coroner hold for two months and then is unavailable due to repairs, each window of time should be reflected in a unique offline status. If the offline reason changes, click the blue (+) to add a new offline status. This will automatically end the former offline status and allow you to record the updated offline reason.

Make a Unit Offline

1. In cases where a unit is not ready for a new client immediately, the unit should be set to offline. To do so, ensure you are in the agency associated with the program/building and then go to the **Inventory Dashboard**, which can be found in the primary navigation menu on the far left.
2. Select the Building by using Building filter at the top of the page.
3. Select the appropriate unit to see the unit's pop-up display card. Click the **Status** button, then find the (+) to add an offline status.
4. Select **Offline** under **New Status**. (Do not use Inactive.) Select the appropriate offline reason and add in any needed notes. Select the appropriate date and time. A unit cannot be both offline and online at the same time, so selecting the right time is important. Leave the End Date for the offline status as blank. Even if you have a projected date the unit will



be available, leave the End Date blank until the unit is actually available again.

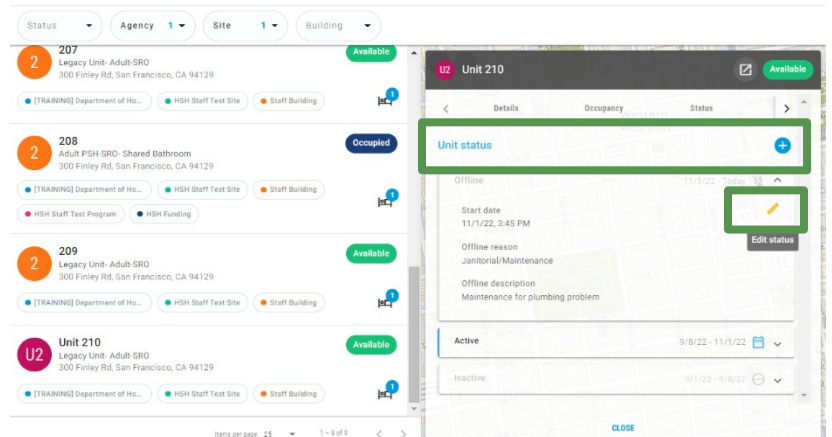


5. If the offline reason has not changed but you have additional information to add to the offline description field, click the pencil icon to edit the offline status.

End an Offline Status to Update Unit Status Back to Available

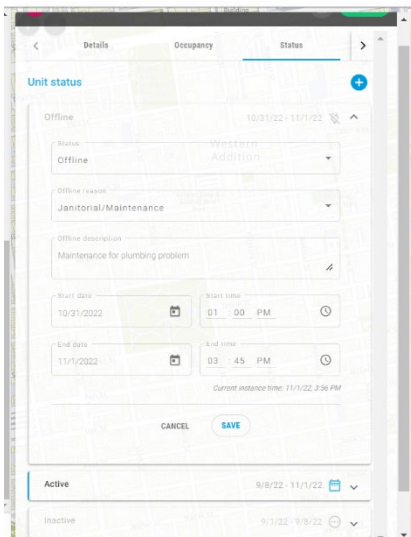
1. When a unit is ready to be marked as Available, open the **Status** section again. Find the most recent **Offline Status**, which will be grey. Click the status entry to expand:

2. Select the pencil tool to edit this offline status (Note! The pencil will only appear if you are under the agency associated with the program/building, so you may need to switch agencies and try again if you are a user with access to multiple agencies in ONE). Add an end date to the offline status. We



recommend leaving the time to the default of 12 AM. Saving an end time that has already passed will update the status change immediately.

3. Once you press save, a pop-up will prompt you to confirm that this will set the unit to active. Select **Confirm** to finalize the status change. The unit will now appear available.



i The Offline End Date is set to 8/25/2026 02:30 PM. This Unit will automatically become Active after the assigned 'Offline' period ends, and an Active status record will be added on 8/25/2026 02:30 PM if there are no future date unit status records that begin on that date.

Back Confirm

Update Units “Automatically Set to Offline”

When a unit assignment is ended, the unit will become automatically offline and you will need to update the offline reason within 3 days. Unit assignments are ended when a client is exited from a program, a client transfers to another unit within the same program, or when a client moves into a unit that does not match the unit to which the client is referred.

1. Ensure you are in the agency associated with the program/building and then go to the **Inventory Dashboard**, which can be found under the waffle tool. You will only be able to edit the offline reason if you are under the agency associated with the program/building.
2. Select the building and the appropriate unit to see the unit’s pop-up display card. Click the **Status** button and find the most recent **Offline Status**, which will be grey. Click the status entry to expand and edit the entry. You’ll only see the pencil icon to edit if you are under the correct agency
3. Update the **Offline Reason** field by selecting the most appropriate reason for the vacancy.
4. Delete the text that appears in the **Offline Description** field and add any necessary details here.
5. *Leave the **End Date** for the offline status as blank.* Even if you have a projected date the unit will be available, leave the End Date blank until the unit is actually available again. If you see an end date in the 2050s, you may leave it, as it is automatic and will be removed.

Tips for Updating Offline Status

Please see below for a quick reference guide to handling various scenarios in which the unit status, offline reason, or description changes:

Situation	Action
Unit Automatically Set to Offline at Exit	Update offline reason and description
Offline Status is Extended (offline reason does not change)	Update offline description with additional details
New Offline Status	Add an offline status with offline reason
Offline Reason Changes	Add new offline status with new offline reason which will also automatically end the current offline status
Unit is No Longer Offline	End offline status which will make the unit Available

Managing Households



Both **property managers** and **service providers** are responsible for ensuring households are appropriately managed in ONE.



All information below covers specific data requirements for households.

Households need to be correctly connected and associated in ONE to ensure that data is accurate and households jointly receive services as needed. Household composition is defined by the client. Anyone who will be residing in the same unit should be associated in the same household. However, household members listed in ONE do not *have* to live together or be enrolled in programs together. The global/profile-level household just helps keep a client's relationships organized.

1. Households need to first be connected at the profile level.
 - a. New members can be added by selecting "Household" in the client navigation menu to the left of the screen. Select the (+) plus button to add a new household member.

Go to Client search

Sally Ride

You are currently viewing the Client Record pages for Sally Ride (BC848924C).

Profile

Privacy

Household

History

Programs

Services

Assessments

Current household members

Active members of this client's household

Client	Join Date
SR Sally Ride Mother	12/22/25 8 months 4 days ago
JR Jillian Ride Child	12/22/25 8 months 4 days ago

1 - 2 of 2

- b. A right-hand window will appear to walk you through the process. First, search for the name of the additional household member. Verify you have found the correct person using the date of birth or last four of their SSN, and click on their name to highlight and select. Click "Next".

Add household member

1 Select or add a client

Clients

Select or create a client that will be added to the household

11/11/75

Client	Date of Birth	SSN	Last Updated
GW Gregory Wiseman	11/11/75	9876	6/4/26

1 - 1 of 1

Next

- c. If you do not find the new household member, you will need to add a profile for them. If this is the case for any adults, [be sure you have a completed ROI on file](#).
- d. A window will pop up that allows you to select the relationship and the date that the secondary household member joined the household. This date should be on or before the date that the household moves into the unit.

- e. Once complete, the household members will be listed in the household section of the client's profile and anywhere else in the system that household members are displayed, including widgets. The individual with the star is designated as the Head of Household. You can then edit the head of household's relationship, or use the arrows to jump to the other household member's client records.

2. Clients need to be connected as a household at the profile level to enroll them into a program together.

- a. When completing section 2 of the enrollment, be sure to toggle this on any members of the household that will also be living at this site.
- 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 Head of Household at client profile level, edit to reflect appropriate head of household.

New Client Program

Create client program for Ellison Onizuka

Program Date
08/25/2026

Translation Assistance Needed
No

Relationship to Head of Household
Self (head of household)

New Client Program

Create client program for Victor Glover

Program Date *

08/25/2026

MM/DD/YYYY

Relationship to Head of Household *

Head of household's spouse or partner

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

- c. Once the enrollment is complete, *only the head of household* should be assigned to a unit. In reports, that will show as all household members under the same unit in one row. Errors will occur if the additional household members are assigned to the unit instead.

Program Roster Report

[TRAINING] Department of Homelessness and Supportive Housing (HSH)

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: HSH Staff Test Program - HSH Funding																
Crayon, Blue	8704EB98	09/12/1998	24	24	11/02/2022	11/02/2022	0	11/02/2022	0	0	0	S. Hoffman	206 Test	n/a	11/02/2022	
Potter, Harry	7E4332E72	07/31/1980	42	42	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	202	n/a	11/02/2022	
Potter, Albus	8F831AE70	04/12/2006	16	17	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a		
Potter, Ginevra	65DFA16B1	12/12/1982	39	40	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a		
Doe, Jane	D01CE8CF0	11/01/1994	28	28	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Fox, Freddy	0E70D5AE7	02/12/2001	21	22	11/02/2022	-	60	undefined	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Sponge, Bob	6384CA5F2	01/03/1981	41	42	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Cattkins, Belles	D028D613E	10/27/2007	15	15	11/09/2022	-	53	11/09/2022	0	0	0	L. Asher	n/a	n/a	n/a	n/a
Test, Gabriela	A820A8B6D	01/01/2001	21	22	12/07/2022	12/13/2022	6	undefined	0	0	0	G. Perez	n/a	n/a	n/a	n/a
Test Str 2, Housing	14FAF7AD9	11/01/1998	24	24	12/12/2022	-	20	12/12/2022	0	0	0	S. Ray	208	n/a	12/12/2022	12/12/2022
Stevens, Cat	FB5D77380	01/01/2001	21	22	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	1206 E Mariner Drive	n/a	11/05/2022	
Hat, Cat	80B972D3C	11/16/1988	33	34	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
													Number of Enrollments: 13			
													Number of Unique Clients: 13			
													Number of Households: 10			
													Total Number of Enrollments: 13			
													Total Number of Unique Clients: 13			
													Total Number of Households: 10			

3. If a household member moves in after the head of household, they should be added to the enrollment, rather than enrolled separately.
- Follow the instructions to link the household member to the client's profile.
 - Open the head of household's program enrollment, and select the **Group** tab from the program menu. Select **(+) Add** to add in the other household members.

- c. A right-side window will appear with all household members listed who are not already enrolled. Toggle on those that you wish to add to the enrollment. Anyone who will be residing in the unit should be added to the enrollment.
- d. Select **Next**, which will prompt you to complete the enrollment screen for the additional household member(s). Once completed, the newly added household members will show under **Group Members** for the original enrollee.

4. If a household is incorrectly enrolled and both members are enrolled in the program separately, only one will show as associated with a unit, and any others will show as n/a. To join these individuals into a group enrollment, you will need to work with the Bitfocus help desk (onesf@bitfocus.com).

Program Roster Report

[TRAINING] Department of Homelessness and Supportive Housing (HSH)

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.

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Potter, Harry	7E4332E72	07/31/1980	42	42	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	202	n/a	11/02/2022	
Potter, Albus	8F831AE70	04/12/2006	16	17	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a		
Potter, Ginevra	65DFA16B1	12/12/1982	39	40	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a		
Test, Bitfocus	560656F23	01/01/1978	44	45	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Doe, Jane	D01CE8CF0	11/01/1994	28	28	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Fox, Freddy	0E70D5AE7	02/12/2001	21	22	11/02/2022	-	60	undefined	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Sponge, Bob	6384CA5F2	01/03/1981	41	42	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Atkins, Belles	0028D013C	10/27/2007	15	15	11/09/2022	-	55	11/09/2022	0	0	0	L. Asriel	n/a	n/a	n/a	n/a
Test, Gabriela	A820A8B6D	01/01/2001	21	22	12/07/2022	12/13/2022	6	undefined	0	0	0	G. Perez	n/a	n/a	n/a	n/a
Test Sr 2, Housing	14FAF7AD9	11/01/1998	24	24	12/12/2022	-	20	12/12/2022	0	0	0	S. Ray	208	n/a	12/12/2022	12/12/2022
	80B972D3C	11/16/1988	33	34	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	Mariner Drive			
Hat, Cat	80B972D3C	11/16/1988	33	34	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a

Number of Enrollments: 13

Number of Unique Clients: 13

Number of Households: 10

Total Number of Enrollments: 13

Total Number of Unique Clients: 13

Total Number of Households: 10

Note: * denotes Inactive Assigned Staff

Note: * denotes inactive Assigned Staff

- a. First, review the household at the profile level and ensure that the household members are in a group together and the appropriate person is set as head of household. Confirm that the date of the household grouping is on or before the date of that the household moved in together.
- b. Then email the Bitfocus help desk at onesf@bitfocus.com. In the email, include the unique identifier of all household members. Be sure note which member should become the head of household for the enrollment and their relationship to the HoH. The help desk will then update the enrollments so they are grouped as a household.

- c. Once the household is grouped, confirm the appropriate relationship type under Programs > Group members.

The screenshot shows the HSH ONE System interface for a client named Sally Ride. The left sidebar has the 'Programs' tab highlighted with a green box. The top navigation bar has the 'Group' tab highlighted with a green box. Below the 'Group' tab, the 'Group members' section is displayed, showing a table of household members enrolled in the Kelly Cullen Community - LOSP program.

Name	Start Date	End Date
Sally Ride Mother	8/18/26	Active
Jillian Ride Child	8/25/26	8/25/26

1 - 2 of 2

Household Splits – Separating Enrollments

There are various scenarios that could occur that affect the way you will need to update ONE to properly reflect a household split. Here are two examples.

1. If one household needs to be changed from a group enrollment to individual enrollments to reflect that they are now two separate households, still enrolled in the same program:
 - a. Exit the household member from the Group enrollment as of the calendar day before the move and choose the following options for these 3 fields:

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

The Head of Household's enrollment will then become an Individual enrollment and nothing will need to be done (unless the unit assignment needs to be updated)

- b. Re-enroll the household member to the program as of the day of the move and choose the following options for these 2 fields:

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

2. If a head of household is exited from the program before other household members, who need to remain enrolled in the program:
 - a. The unit will automatically become offline and the property management staff will need to add an end date to the automatic offline status. The end date/time should match the start date/time. See [Update Units "Automatically Set to Offline"](#).
 - b. Assign a remaining household member as the head of household in the program enrollment and update other household members relationship to the new head of household if necessary. You must assign this household member at least 15 minutes after the end date of the offline status created by the head of household's exit.
 - c. Add the housing move in date for the new head of household. This should be the same as the program start date.
 - d. Assign the new head of household to the unit.

Annual Assessments in ONE



This task is completed by **service providers** in ONE.



Complete an **Annual Assessment** within (before or after) 30 days of client's anniversary date in the program.

Service providers must complete an Annual Assessment for all PSH tenants. Annual Assessments collect updated information about clients enrolled in the ONE System. While necessary for reporting requirements, Annual Assessments also help ensure continuity of care across the Homelessness Response System. Annual Assessments should be completed on or near the client's anniversary date which means they will need to be completed on a rolling basis across all clients in the building.

1. From the client's profile, click **Programs** tab, then select the program enrollment.

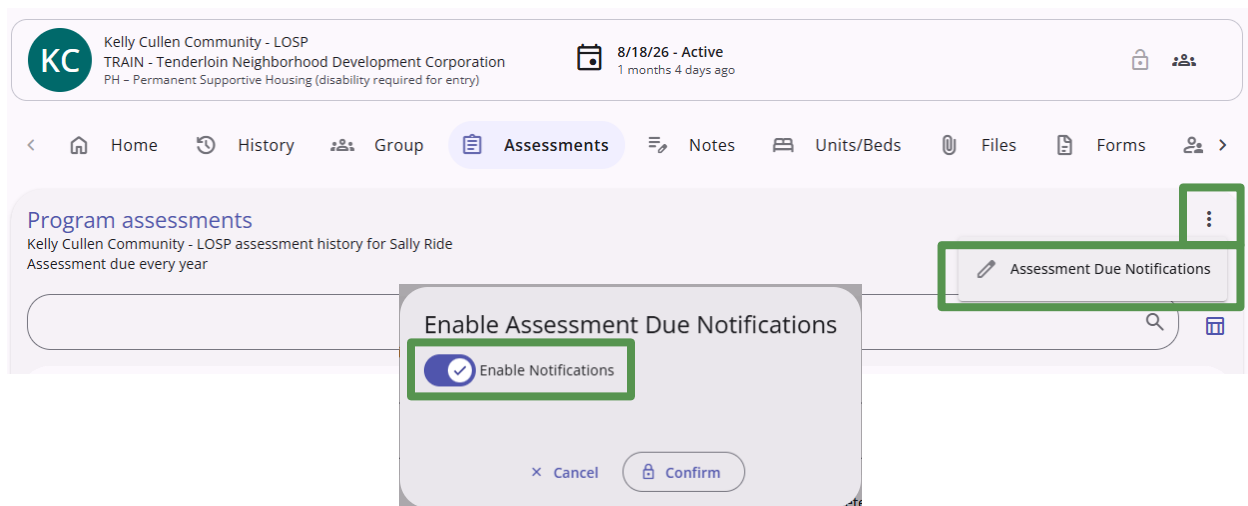
The screenshot shows the HSH ONE System interface for a client named Sally Ride. The left sidebar contains navigation options: Profile, Privacy, Household, Reports, Units/Beds, Care Team, History, Services, **Programs** (highlighted with a green box), and Assessments. The main content area shows the client's profile with the 'Assessments' tab selected in the top navigation bar. A modal window titled 'Add a program assessment' is open, displaying a list of available assessments. The 'Annual Assessment' option is highlighted with a green box. The modal also includes a search bar, a 'No results yet!' message, and a 'Next' button at the bottom.

2. Within the program, select the **Assessments** tab, and click the plus (+) sign to add a new program assessment.
3. In the right-hand window that opens, select **Annual Assessment** from the list of Available Assessments.
4. Follow the steps by updating each section where appropriate and selecting Next to continue. When you've completed all screens, select **Complete** to save.
 - From the program enrollment, click the Assessments tab
 - Click the Start button on Annual Assessment
 - Toggle client name(s) on, then click the Add Annual Assessment button
 - Complete the Annual Assessment, then click Save and Close

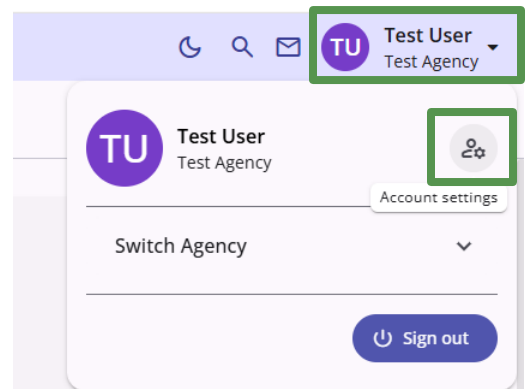
Adding Annual Assessment Warnings

Staff can set assessment warnings to receive a notification when the annual assessment is due for a client on their caseload. There are two different ways to manage notifications in the system.

1. Individually: Program Enrollments
 - a. Make sure you are an assigned staff on the client's enrollment. If you do not see your name on the **Assigned Staff** tab in the client menu, click the **(+)** plus icon to add yourself.
 - b. On the Assessments tab, select the three dot action menu on the right side, and then select **Assessment Due Notifications**.
 - c. An **Enable Assessment Due Notifications** dialog box will pop up. Toggle ON "Enable Notifications" and click Confirm to save.



3. Globally: User Account Settings
 - a. Click your user icon (usually your initials) or name at the top right of the screen, then select the icon for **Account Settings**
 - b. On the **Profile & Preferences** screen, click the pencil icon to edit the options. Scroll to the bottom of the list under Preferences and toggle on **Assessment Due Warning**. You can then set the timeframe desired, and click **Save** to save your changes.



For every enrollment you complete after turning on the user level assessment due warnings, the Assessment due every year notification will automatically be toggled on and you will receive notifications. Note: if you have previously completed enrollments and did not turn on the Assessment Due Warning notifications individually, you will need to go back and turn them on in each client's program enrollment.

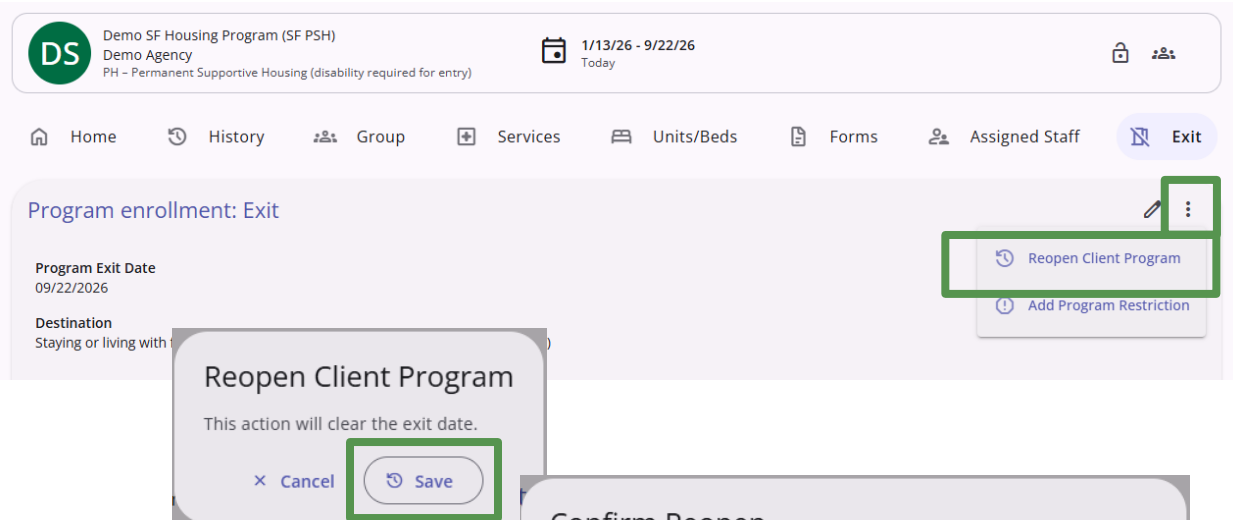
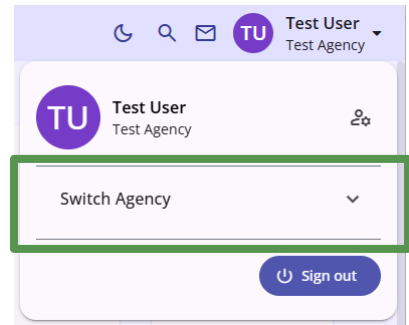
Reopening a Program Enrollment to Enter Services



This task is completed by **service providers** in ONE.

If you need to enter program services after a client has been exited from the program, you will first need to reopen the program enrollment. You can then enter the services and restore the exit data.

1. Start by ensuring that you are working within the correct agency in ONE. You can change agencies through the dropdown list under your name in the top right corner of the screen.
2. From the client's profile, select the **Programs** tab, then open the program enrollment.
3. In the program enrollment, open the **Exit** tab (you might need to scroll right to see it). Make note of the **Exit Date** either by copying it to your clipboard or writing it down. On the Exit tab select the three dot action menu and then select "Reopen Client Program":



4. Select **Save** to clear the exit date and reopen the program. The system will ask you to confirm. Select **Save** on the second dialog box as well.
5. Once the program has been reopened, you can click on the **Services** tab to enter any necessary services.
6. When you are done, exit the client again on the **Exit** tab, using the existing **Program Exit Date**. See the section on [Exiting Clients](#) for details.

Tracking Eviction Notices & Unlawful Detainers for PSH Programs



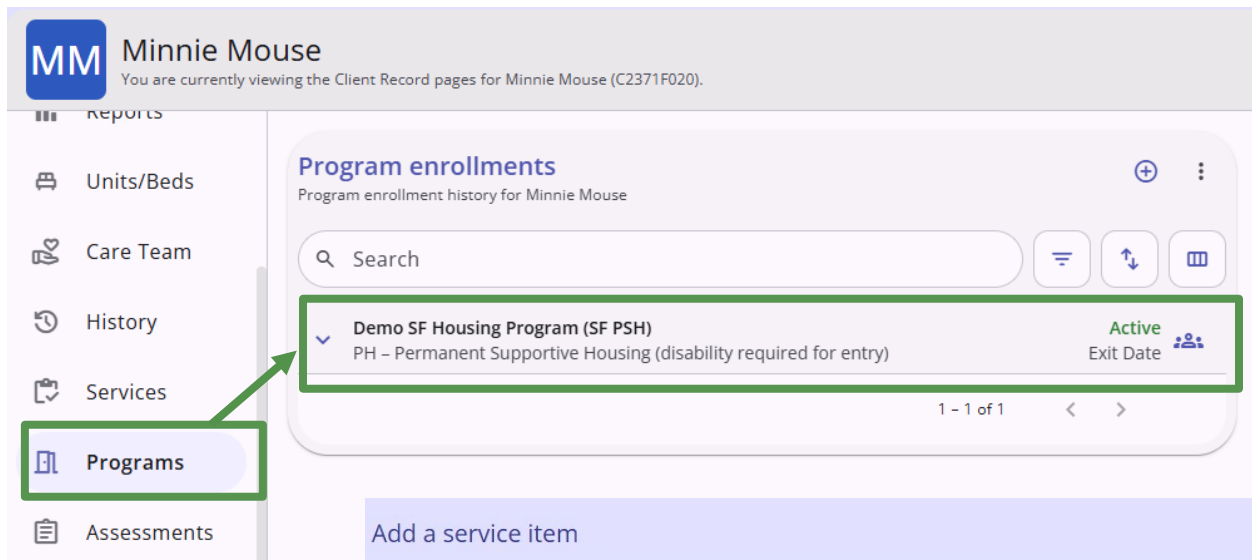
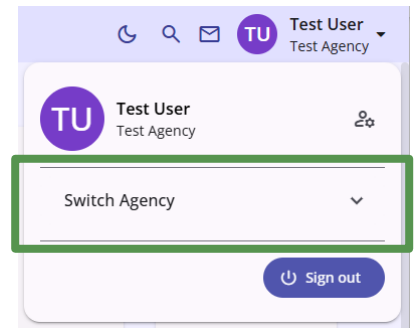
This task is completed by **service providers** in ONE.



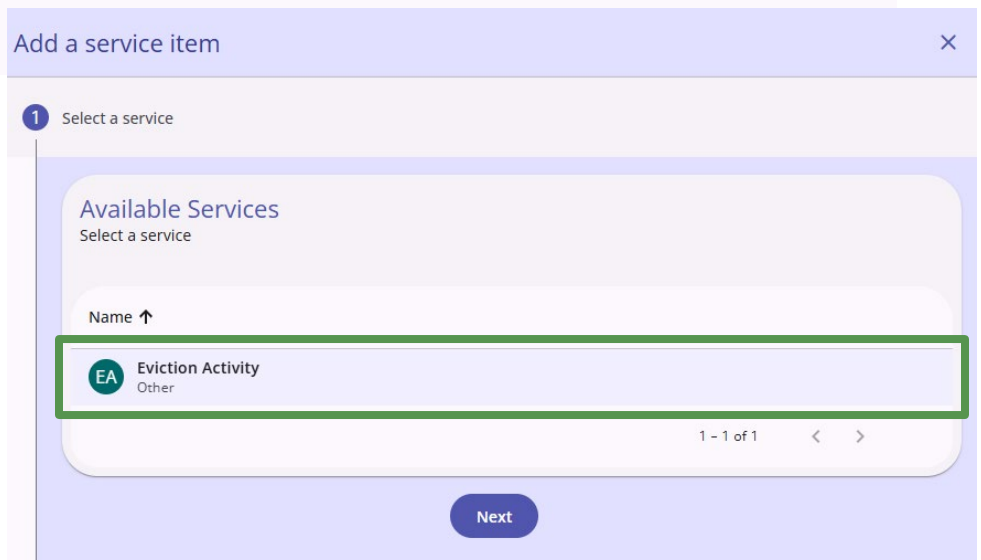
Enter the **Eviction Activity Service** by the 15th of the month following the actual service date on the tenant.

Eviction Notice and Unlawful Detainer data helps HSH gather trends for both internal and external review and learning. Internally, HSH will use this data to understand eviction and unlawful detainer trends across the system and overlay ONE system demographic data to understand these trends through an equity lens. Externally, HSH reports trends and findings to the Homelessness Oversight Committee and Board of Supervisors. Each eviction notice and Unlawful Detainer (UD) served on a tenant should be entered as a Program Service in ONE.

1. Start by ensuring that you are working within the correct agency in ONE. You can change agencies through the dropdown list under your name in the top right corner of the screen.
2. Within the client's profile, open the **Programs** tab, then select the program enrollment:



3. Within the program enrollment, select the **Services** tab, then hit the plus button (+) on the right side to add a new service.
4. Under **Available Services**, select **Eviction Activity**, and then click **Next**.



5. In step 2, select a service item from the **Available Service Items**. Select the appropriate item: **Legal Notice** or **Unlawful Detainer**, and the reason.
6. For each notice or Unlawful Detainer served on the tenant, enter the **Event Date** (this should be the actual date the notice or Unlawful Detainer was served on the tenant), then click **Save**.

2 Select a service item

Available Service Items
Select an item within the Eviction Activity service

Name

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

1 - 6 of 6 < >

Back Next

3 Provide service

Provide service
Provide Unlawful Detainer Served - Lease Violation from the Eviction Activity service

Service Name
Eviction Activity

Category
Other

Date

Event Date *

09/22/2026

MM/DD/YYYY

Data entered on Eviction Activity is available in the ONE System under the Data Analysis tab. See SF ONE System Reports > Data Quality Reports > [Eviction Reporting](#) for a data quality dashboard of Eviction Notices and UDs served, Evictions, and Lease Violation Eviction Details.

Review Housing Reports for Accuracy



Both **property managers** and **service providers** are responsible for accurate data in ONE.



Check reports weekly to ensure accuracy.



Pay attention to reviewing appropriate sections for households.

It is recommended that program staff review rosters at least weekly to ensure that the information in ONE is accurate. To confirm that clients are associated with their current units in ONE, review the **Program Roster Report**, which includes the unit numbers associated with a client's program enrollment. This report is available under the Report Library. All other reports are in the Data Analysis tab.

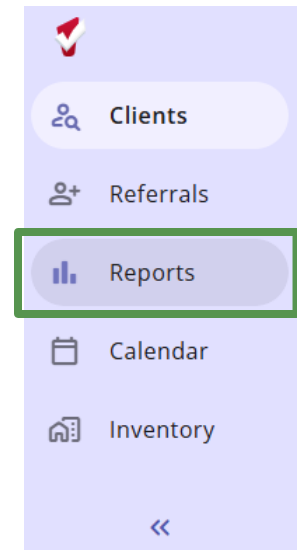
To confirm that units are correctly identified as occupied, offline, or available, review the [Building Roster Report](#). Review the [Housing Inventory Snapshot](#) to see a summary count of units by status. The [Properties of Buildings](#) and [Properties of Units](#) reports include the information in the system about each building and unit so that you can view and review them for accuracy.

Both Service Providers and Property Managers are responsible for ensuring that the data in ONE is accurate. Below are the primary reports that will help with data quality.

Program Roster

1. Ensure you are under the correct agency in ONE.
2. From the primary navigation menu on the left, select **Reports**.
3. Under the Report Library, expand Program Based Reports. Find **Program Roster**, and click to run.

Program Based Reports		19 report(s) ^
[EMPL-101] Employment Report	☆  RUN  SCHEDULE MORE INFO ▾	
[EMPL-102] Employment / Education Report	☆  RUN  SCHEDULE MORE INFO ▾	
[EXIT-101] Potential Exits	☆  RUN  SCHEDULE MORE INFO ▾	
[EXPS-103] Program Funding Source Financial Detail	☆  RUN  SCHEDULE MORE INFO ▾	
[GNRL-105] Program Participation Summary	☆  RUN  SCHEDULE MORE INFO ▾	
[GNRL-106] Program Roster	☆  RUN  SCHEDULE MORE INFO ▾	
[GNRL-220] Program Details Report [2022]	☆  RUN  SCHEDULE MORE INFO ▾	



4. You can select either the web or Excel version, which will include the unit information, or select the PDF version that includes both the program and unit.

REPORT LIBRARY

Program Based Reports > [GNRL-106] Program Roster

Program(s)

Riverside Rapid Rehousing
Test Program
YHDP - Host Home Program
YHDP 3rd Street Homeless Youth RRH Program
YHDP Larkin Street YAC Collaborative

Status

Active within Report Date Range

HoHs Only?

☒ No
☐ Yes

Report Date Range

10/24/2022
10/24/2022

Report Output Format

☐ Web Page
☐ PDF - Program
☒ PDF - Program and Unit
☐ Excel

SUBMIT

- Review the report for accuracy. Clients will either show as having a unit number under the **Unit Assignment** column or n/a. Households that are appropriately enrolled together will be listed within the same section with one unit listed in the unit assignment cell. Households that are incorrectly enrolled will have one individual with a unit and the other household members' units will appear as n/a. All clients must have a move-in date associated with their enrollment, and the move-in date must be on or after the program start date so any showing as undefined must be updated or program start date must be updated.

Program Roster Report

[TRAINING] Department of Homelessness and Supportive Housing (HSH)

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.

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Potter, Harry	7E4332E72	07/31/1980	42	42	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	202	n/a	11/02/2022	
Potter, Albus	8F831AE70	04/12/2006	16	17	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a		
Potter, Ginerva	65DFA16B1	12/12/1982	39	40	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a		
Test, Bitfocus	560656F23	01/01/1978	44	45	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Doe, Jane	D01CE8CF0	11/01/1994	28	28	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Fox, Freddy	0E70D5AE7	02/12/2001	21	22	11/02/2022	-	60	undefined	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Stevens, Cat	FB5D77580	01/01/2001	21	22	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	1206 E Mariner Drive	n/a	11/02/2022	
Hat, Cat	80B972D3C	11/16/1988	33	34	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards		n/a		
Sponge, Bob	6384CA5F2	01/03/1981	41	42	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Cattikins, Belles	D028D613E	10/27/2007	15	15	11/09/2022	-	53	11/09/2022	0	0	0	L. Asher	n/a	n/a	n/a	n/a
Test, Gabriela	A820A8B6D	01/01/2001	21	22	12/07/2022	12/13/2022	6	undefined	0	0	0	G. Perez	n/a	n/a	n/a	n/a
Test Sr 2, Housing	14FAF7AD9	11/01/1998	24	24	12/12/2022	-	20	12/12/2022	0	0	0	S. Ray	208	n/a	12/12/2022	12/12/2022

Number of Enrollments: 13

Number of Unique Clients: 13

Number of Households: 9

Total Number of Enrollments: 13

Total Number of Unique Clients: 13

Total Number of Households: 9

Note: * denotes Inactive Assigned Staff

Program Roster Troubleshooting Tips:

- If a client does not appear on the program roster report, they must be enrolled in the program. See [Accept and Enroll Client in a Program](#).
- If a client appears on the program roster report, but their unit is incorrect, they need to be associated with their current unit. See [Transferring a Client to a New Unit](#).
- If a client has “N/A” in the unit column, this could be one of two issues:
 - The client is associated with a unit, but does not have a move-in date entered in their enrollment. See Step 6 of [Accept and Enroll Client in Program](#). Any housing move-in dates showing as “undefined” should be updated to reflect the date the client moved into the building.
 - The client is a member of a household that was not enrolled together. See [Managing Households](#) for instructions on linking clients within households and updating enrollments to accurately represent all tenants within a unit.
 - Another household member may be assigned to the unit, rather than the Head of Household. If this is the case, the HoH should be assigned to the unit or the HoH needs to be updated to the client assigned to the unit.

Accessing Reports in the Data Analysis Tab

1. From the primary navigation menu, open **Reports**. Select the **Data Analysis** tab. It sometimes takes longer to load than other pages in the ONE System.
2. Select **San Francisco ONE System Reports** to expand the menu. Under **Inventory - Housing**, there are custom reports for various purposes:

Building Roster: Includes all clients in a building with unit assignments

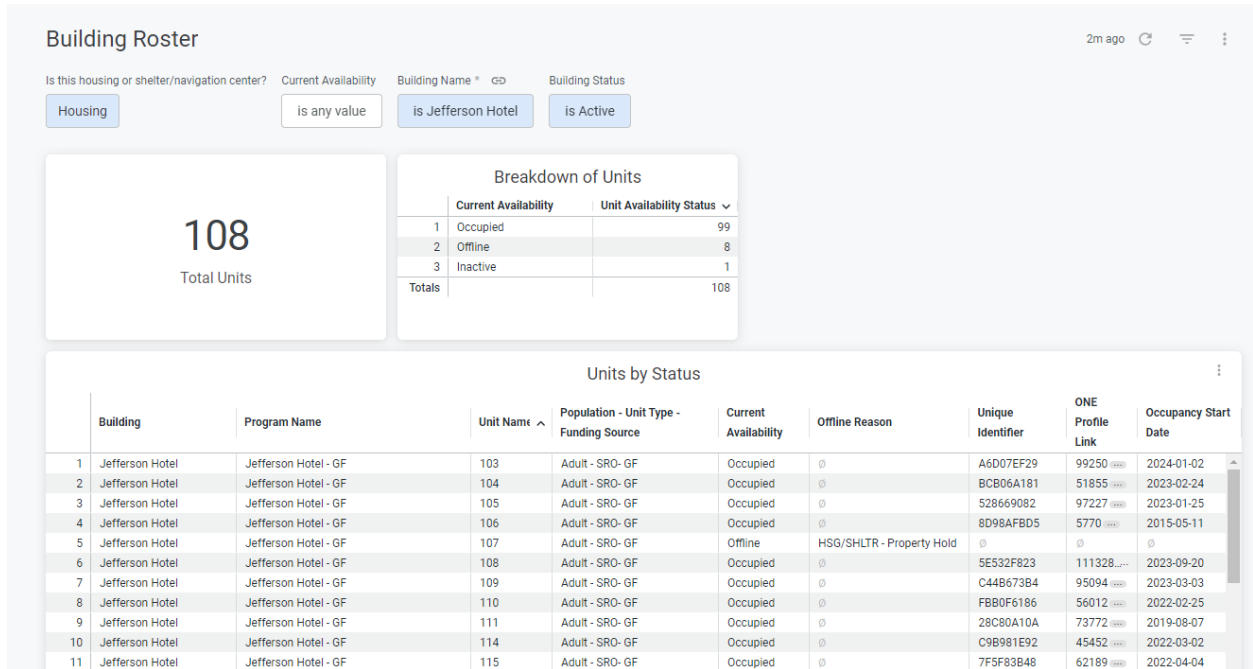
Housing Inventory Snapshot: Displays total units by status in each building

Properties of Buildings/Units: Includes information about each building and unit in the ONE System

REPORT LIBRARY EXPLORE DATA ANALYSIS	
Built In Reports	0 report(s) ▾
San Francisco ONE System Reports	68 report(s) ▲
*Inventory - Housing	
Building Roster	⌂ RUN
Housing Inventory Snapshot	⌂ RUN
Housing Inventory Snapshot by Property Manager	⌂ RUN
Housing Inventory Snapshot for HAT Buildings	⌂ RUN
Inactive Units	⌂ RUN
Offline Housing Units by Reason	⌂ RUN
Program Rosters to Verify Unit Assignments - All agencies except ECS, TNDC and THC	⌂ RUN
Program Rosters to Verify Unit Assignments - Episcopal Community Services	⌂ RUN
Program Rosters to Verify Unit Assignments - Tenderloin Housing Clinic	⌂ RUN
Program Rosters to Verify Unit Assignments - Tenderloin Neighborhood Development Corporation	⌂ RUN
Properties of Buildings Report	⌂ RUN
Properties of Units Report	⌂ RUN

Building Roster

- Under the waffle tool, select **Reports**. Select the **Data Analysis** tab. Select **San Francisco ONE System Reports** to expand the menu. Under **Inventory**, select the **Building Roster**.



- The **Building Roster Report** provides information on the status of each unit in a building. Information on each client associated with a given unit is also presented in this report (client information removed below). Select the desired building and then click the **blue circular update arrow** [] to refresh the report.

Building Roster Troubleshooting Tips:

- If a client appears on this report who no longer lives in your building, they need to be exited from the program to also exit them from the unit record in ONE. See [Exit Client from a Program](#).
- If a client appears on the report, but their unit is incorrect, they need to be associated with their current unit. See [Transferring a Client to a New Unit](#).
- If a current tenant does not appear on the report, they must be enrolled in the program and their current unit verified. See [Accept and Enroll Client in a Program](#) and [Transferring a Client to a New Unit](#).
- If a unit's status is incorrect, it must be updated. See [Managing Offline Units](#).
- If a unit is pending occupancy status and the household that is referred is incorrect, communicate with the referring user to update. See [Managing Referrals](#).

Housing Inventory Snapshot

1. The **Housing Inventory Snapshot** defaults to a portfolio level view of all site-based housing units in ONE, but users can filter for a specific agency or housing program. Be sure to refresh the report using the **blue circular update arrow** [] whenever you update the filters. The count of units in each of the different statuses is displayed.

*Inventory - Housing

Housing Inventory Snapshot

4m ago  

Agency Name Program Name

Agency Name	Program Name	Building Name	Total Unit Count	Inactive Units	Offline Units	Status Unknown Units (see report footnote)*	Reported Occupied via Offline Status	Occupied Units	Pending Occupancy Units	Available Units	Program Vacancy Rate (see report footnote)**
Abode Services	City Gardens - HUD PBV	City Gardens	50	0	0	0	0	50	0	0	0%
	City Gardens - Prop C	City Gardens	150	7	1	0	37	102	0	4	3%
	Verona - GF	Verona Hotel	65	0	1	0	0	63	0	1	3%
Bay View Hunters Point Multipurpose Senior Services	Dr. Davis Senior Community - HUD PBV	Dr. Davis Senior Community	23	0	0	0	0	18	0	5	22%
Bayview Hunters Point Foundation for Community Improvement	Arlington Residence - CoC	Arlington Residence	21	0	0	0	0	16	0	5	24%
	Arlington Residence - HUD PBV	Arlington Residence	65	0	0	0	0	57	0	8	12%
	Arlington Residence - LOSP	Arlington Residence	67	0	1	0	19	45	0	2	4%
	Bayview Hill Gardens - CoC	Bayview Hill Gardens	17	0	0	0	0	13	0	4	24%
	Bayview Hill Gardens - HUD PBV	Bayview Hill Gardens	33	0	0	0	0	24	0	9	27%
	Bayview Hill Gardens - LOSP	Bayview Hill Gardens	22	0	0	0	0	21	0	1	5%
	Monterey Boulevard Apartments - LOSP	Monterey Boulevard Apartments	4	0	0	0	0	1	0	3	75%
Catholic Charities CYO	10th and Mission - LOSP	10th and Mission	44	0	0	0	0	41	0	3	7%
	Edith Witt Senior Community - HUD 202	Edith Witt Senior Community	16	0	0	0	0	16	0	0	0%
	Edith Witt Senior Community - LOSP	Edith Witt Senior Community	11	0	0	0	0	10	0	1	9%

2. Use the **Housing Inventory Snapshot by Property Manager** report for the same information as the Housing Inventory Snapshot, but sorted by Property Management organization rather than Support Services.
3. Once you open the Snapshot report, you can filter by Agency or Program. If you do select a filter, hit the round blue arrow button in the top right corner to refresh the report. This report shows the total unit breakdown by program and building. Check to make sure the number of units in each column is correct. You might need to [end the offline status of a unit](#) or [update the unit associated with a client](#) to ensure these numbers match.

Properties of Buildings

The **Properties of Buildings** report allows for all system fields related to building records to be displayed. Be sure to scroll to the right to see all details. It can be filtered by agency, building, or building status. Be sure to refresh the report using the **blue circular update arrow** [] whenever you update the filters. If there are any erroneous entries, please let your HSH program manager know as soon as possible.

Properties of Buildings Report just now   

Agency Building Building Status Is this housing or shelter/navigation center?

Site-Based PSH Buildings

	Agency	Building Name	Building Status	Property Manager	Address	ZIP Code	SRO Building
1	Abode Services	City Gardens	Active	Housing For Independent People	333 12th St	94103	No
2	Abode Services	Verona Hotel	Active	Abode Services	317 Leavenworth St	94102	Yes
3	Bay View Hunters Point Multipurpose Senior Services	Dr. Davis Senior Community	Active	John Stewart Company	1751 Carroll Avenue	94124	No
4	Bayview Hunters Point Foundation for Community Improvement	Arlington Residence	Active	Mercy Housing	480 Ellis St	94102	Yes
5	Bayview Hunters Point Foundation for Community Improvement	Bayview Hill Gardens	Active	Mercy Housing	1075 Le Conte Avenue	94124	No
6	Bayview Hunters Point Foundation for Community Improvement	Monterey Boulevard Apartments	Active	Caritas Management Corporation	403 Monterey Boulevard	94127	No
7	Catholic Charities CYO	10th and Mission	Active	Mercy Housing	1360 Mission Street	94103	No
8	Catholic Charities CYO	Edith Witt Senior Community	Active	Mercy Housing	875 Stevenson Street	94103	No
9	Catholic Charities CYO	Hazel Betsey Community	Active	Caritas Management Corporation	3554 17th Street	94110	No
10	Catholic Charities CYO	Treasure Island Phase 1 and 2	Active	John Stewart Company	810 Avenue D	94130	No
11	Chinatown Community Development Center	1296 Shotwell	Active	Chinatown Community Development Center	1296 Shotwell Street	94110	No

Properties of Units

Similar to the Properties of Buildings report, the Properties of Units report allows for all system fields related to individual unit records to be displayed. It can be filtered by agency, building, or building status. Be sure to refresh the report using the blue circular update arrow [] whenever you update the filters. Be sure to scroll to the right to see all details. If there are any erroneous entries, please let your HSH program manager know as soon as possible.

Properties of Units Report 1m ago   

Agency Name Building Name Building Status Is this housing or shelter/navigation center?

Site-Based PSH Units

	Agency	Building Name	Unit Name	Unit Status	Program Associated to Unit	Population - Unit Type - Funding Source	Household Type	Unit Desc
1	Abode Services	City Gardens	201	Active	City Gardens - HUD PBV	Family - 5BR - HUD PBV	Households with at least one adult and one child	
2	Abode Services	City Gardens	202	Active	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	
3	Abode Services	City Gardens	203	Active	City Gardens - Prop C	Family - 4BR - Prop C	Households with at least one adult and one child	
4	Abode Services	City Gardens	204	Active	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	
5	Abode Services	City Gardens	205	Active	City Gardens - Prop C	Family - 4BR - Prop C	Households with at least one adult and one child	
6	Abode Services	City Gardens	206	Offline	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	
7	Abode Services	City Gardens	207	Offline	City Gardens - Prop C	Family - 4BR - Prop C	Households with at least one adult and one child	
8	Abode Services	City Gardens	208	Offline	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	
9	Abode Services	City Gardens	209	Active	City Gardens - HUD PBV	Family - 4BR - HUD PBV	Households with at least one adult and one child	
10	Abode Services	City Gardens	210	Inactive	City Gardens - Prop C	Family - 4BR - Prop C	Households with at least one adult and one child	Abode
11	Abode Services	City Gardens	211	Inactive	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	Abode
12	Abode Services	City Gardens	212	Offline	City Gardens - Prop C	Family - 4BR - Prop C	Households with at least one adult and one child	
13	Abode Services	City Gardens	213	Offline	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	
14	Abode Services	City Gardens	214	Active	City Gardens - Prop C	Family - 4BR - Prop C	Households with at least one adult and one child	
15	Abode Services	City Gardens	215	Active	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	
16	Abode Services	City Gardens	216	Active	City Gardens - HUD PBV	Family - 2BR - HUD PBV	Households with at least one adult and one child	
17	Abode Services	City Gardens	217	Active	City Gardens - HUD PBV	Family - 2BR - HUD PBV	Households with at least one adult and one child	
18	Abode Services	City Gardens	218	Active	City Gardens - HUD PBV	Family - 2BR - HUD PBV	Households with at least one adult and one child	
19	Abode Services	City Gardens	219	Active	City Gardens - HUD PBV	Family - 2BR - HUD PBV	Households with at least one adult and one child	
20	Abode Services	City Gardens	220	Offline	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	
21	Abode Services	City Gardens	221	Active	City Gardens - HUD PBV	Family - 2BR - HUD PBV	Households with at least one adult and one child	
22	Abode Services	City Gardens	222	Active	City Gardens - HUD PBV	Family - 2BR - HUD PBV	Households with at least one adult and one child	

ONE System Report Library Quick Reference Guide

<u>LOCATION IN REPORT LIBRARY</u>		CONTENT
SECTION	TITLE	
Program Based	[GNRL-106] Program Roster	This report provides an overview of program stay information for all active, enrolled, or exited clients.
Program Based	[GNRL-220] Program Details Report	This report is based on program enrollments. Includes all client data at entry, annual assessment, or exit.
Program Based	[OUTS-106] Client Demographics	Provides client demographic details with charts for all enrolled clients for selected programs.
Program Based	[GNRL-400] Program Linked Service Review	Lists all services provided during the reporting period and a detailed listing of services linked to selected programs.
Program Based	[OUTS-720] Client Program Service	Provides a detailed listing of program-linked services by client.
Service Based	[GNRL-104] Service Summary	Provides service counts and the number of unique clients who received selected services.
Service Based	[GNRL-103] Service Census	Provides a list of clients who received specific services on specific dates.
Data Quality	[DQXX-103] Monthly Staff Report	Provides three categories of information: <i>General Data Quality</i> , <i>User Activity</i> , and <i>Data Quality by Data Element</i> for all clients served.
HUD Reports	[HUDX-225] HMIS Data Quality Report	Reviews data quality across a number of HMIS data elements.
Agency Management	[STFF-104] Staff Client Data Activity Report	Provides program management with a record of staff and user client record activity in the ONE System.
Agency Management	[STFF-101] User Activity Report	This report provides information regarding login dates, times, and durations.
Community and Referrals	[RFRL-120] Community Queue Detail	Provides details about clients that were referred to the Community Queue by the agencies with the same CoC as the current agency.
Community and Referrals	[RFRL-122] CE Community Queue Detail Report	This is a referral-based report that provides details about clients on Coordinated Entry queues.
Community and Referrals	[RFRL-102] Referral Outcomes Statistics	This report returns a detailed breakdown of referral outcomes by agency and program.