



DEPARTMENT OF
HOMELESSNESS AND
SUPPORTIVE HOUSING

Site-Based Housing in ONE Support Services

Updated September 2026



Introduction

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

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

- Coordinated Entry
- Property Management
- Support Services

What am I responsible for?



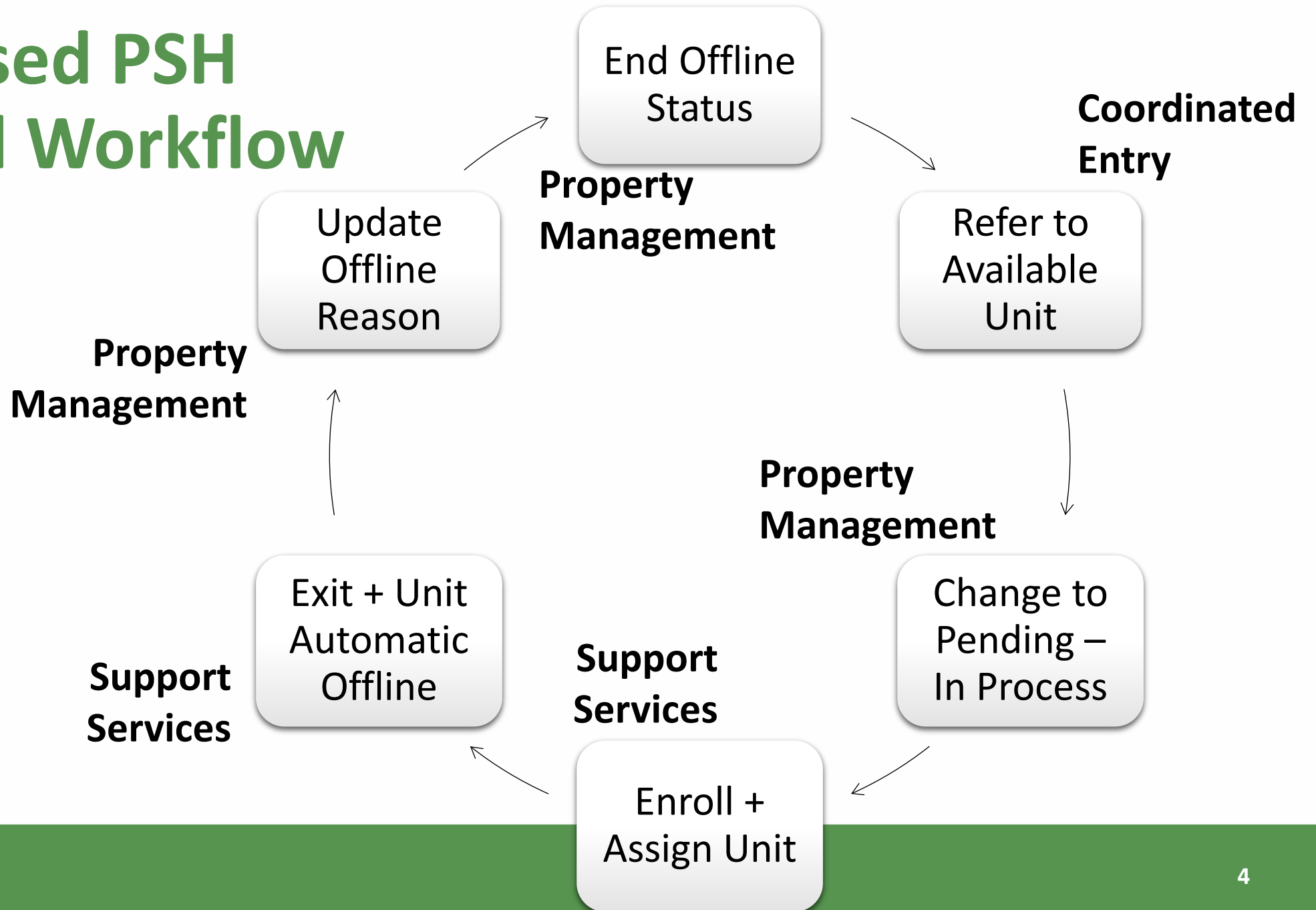
• Support Services

- Program enrollments and ensuring correct unit assignment **at move-in**
- Annual assessments
- Program exits
- Tracking eviction notices and unlawful detainers served
- Ensuring program rosters are up to date and include all clients in your program
- Maintaining Releases of Information

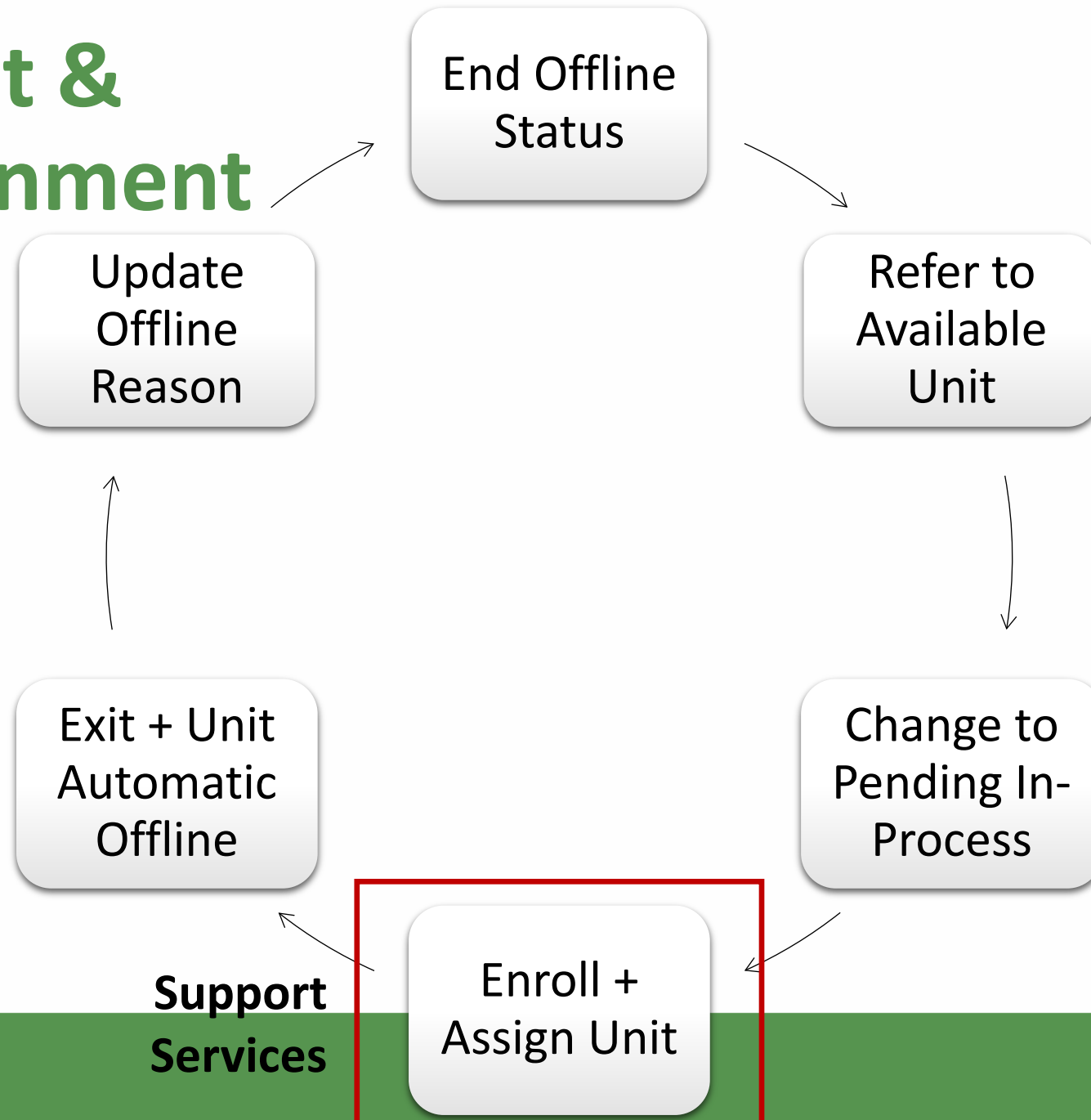
• Property Management

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

Site-Based PSH Referral Workflow



Enrollment & Unit Assignment



Managing Household Composition

- Make sure household composition is correct on the client profile before enrolling in a program
- Update household composition from **Household** tab

Current household members		Active members of this client's household	
Client	Join Date		
Jess B Grandparent	8/11/26 1 days ago		⋮
Benny Jay Grandchild	8/11/26 1 days ago		⋮

Program Enrollment

- New clients should be enrolled in the program within 3 days of move-in
- Enrollments complete referrals so the unit number and the household members should be accurate
- **Program Date** should be the date the client moved in
 - The **Program Date** will autofill the **Housing Move-In Date**
 - The **Housing Move-In Date** can no longer be entered directly
- Complete as many fields as possible and update auto-populated fields

Pay special attention to the Prior Living Situation fields, which are used for key performance indicators

Unit Assignment

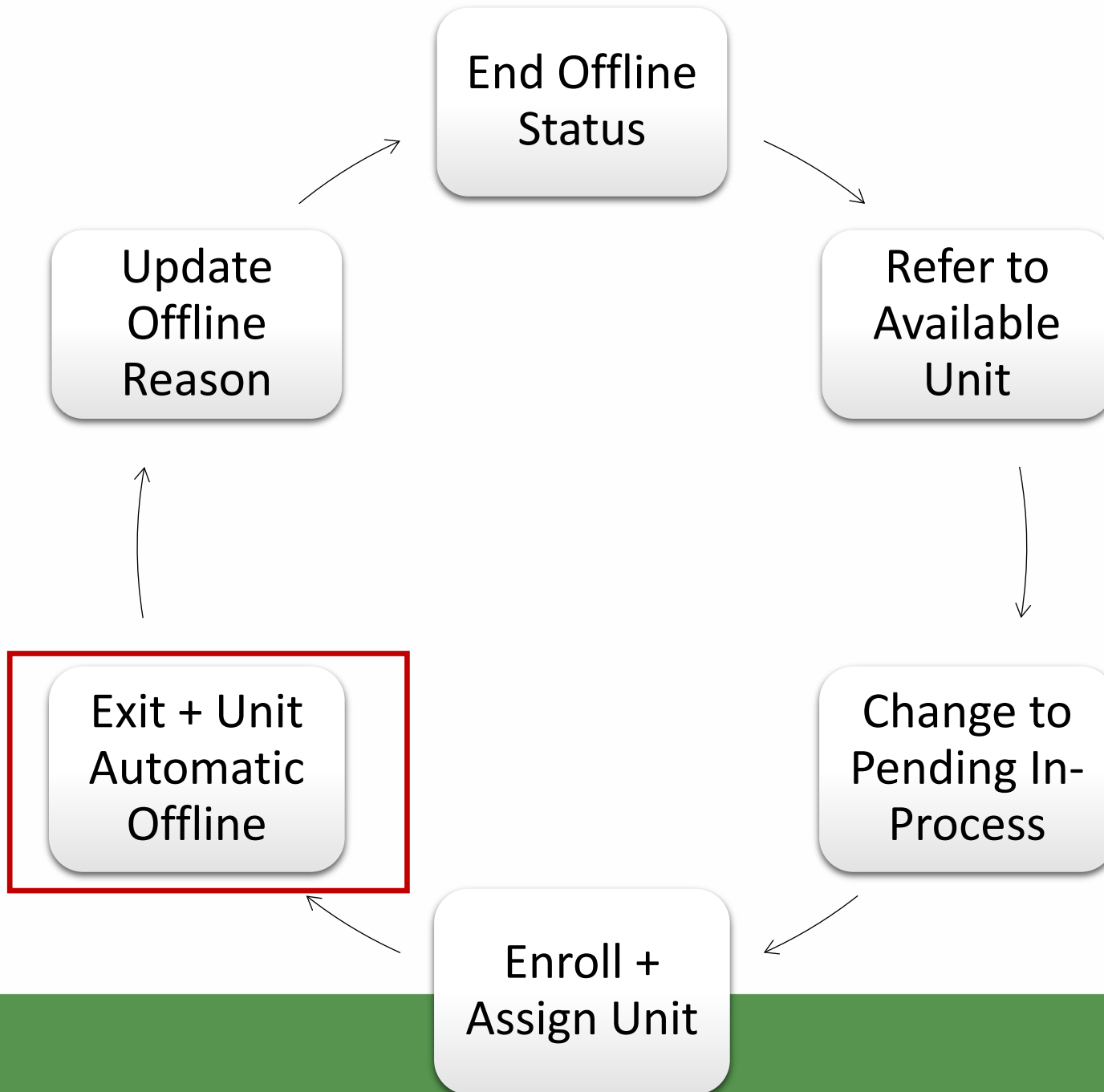
- Unit assignment happens automatically and appears at the bottom of the enrollment screen for the Head of Household (HoH)
 - Initial Unit Occupancy Start Date is auto-filled from the **Program Date** and populates the **Housing Move-In Date**
 - Do not change the start date/time for the unit assignment
- On the enrollment screen for additional household members, ignore the Initial Occupancy message because only the HoH is assigned to the unit

 Please go to the Units/Beds tab to fill out the Initial Occupancy Start Date.

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

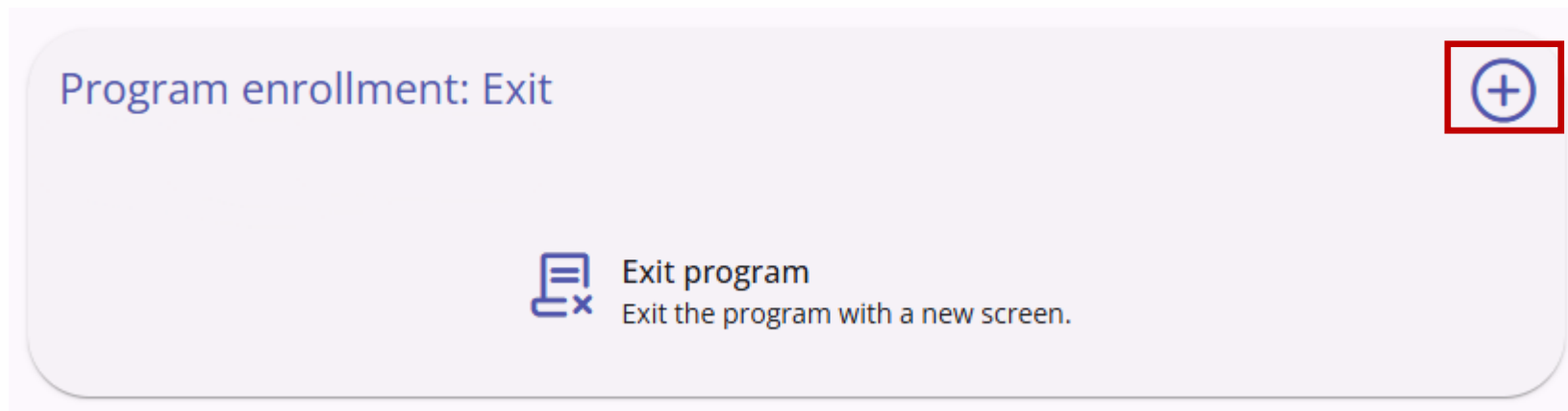
Exits

Support Services



Program Exit

- Clients should be exited from a program within 3 days of when they are no longer receiving services
- Click the "+" sign to open the exit screen to complete the program exit



- Exiting a client from a program will automatically end their unit assignment
- Program exits must be completed for every household member

Annual Assessments

- **Annual Assessments** are due within 30 days before or after the client's anniversary date and must reflect updated information about:
 - Disabling conditions and barriers
 - Income and benefits
 - Health insurance
- Access the **Annual Assessment** from the program enrollment, update any information that has changed, and be sure to save
- Add yourself as an **Assigned Staff** to the program enrollment if you would like to receive a warning when the assessment is coming due
 - You are automatically listed as an Assigned Staff if you did the program enrollment

Homelessness Response System Release of Information (HRS ROI)

- An [HRS ROI](#) must be completed when a client profile is created and updated every 3 years
- A completed HRS ROI includes 2 items recorded in the **Privacy** section of client profile:

1. ROI fields completed

AND

2. An electronic signature **OR** a signed HRS ROI

Client profiles with missing or expired HRS ROIs are flagged



ROI Missing

Release of Information

Permission *

Yes

Start Date *

MM/DD/YYYY

End Date *

MM/DD/YYYY

Documentation *

Select

Select

Electronic Signature

Attached PDF

Add Household Member to Program Enrollment

- Ensure the additional household member is linked to the client's profile
- The additional household member should not be enrolled in the program separately, they should be grouped into the existing enrollment
- Click the **Group** tab within the program enrollment to add the additional household member(s)
 - Ignore the Initial Occupancy message at the bottom of the screen for additional household members - only the head of household is assigned to the unit

 Please go to the Units/Beds tab to fill out the Initial Occupancy Start Date.

Be sure the head of household is designated in the enrollment

Tracking Eviction Notices & Unlawful Detainers

- HSH uses eviction data to understand trends, analyze equity, and report to the Board of Supervisors
- Eviction notices and Unlawful Detainers are recorded in ONE as **Eviction Activity** services within the program enrollment
- **Eviction Activity** services must be added within 3 days of service on the tenant
- The **Event Date** should match the date the notice or UD was served on the tenant

Reports

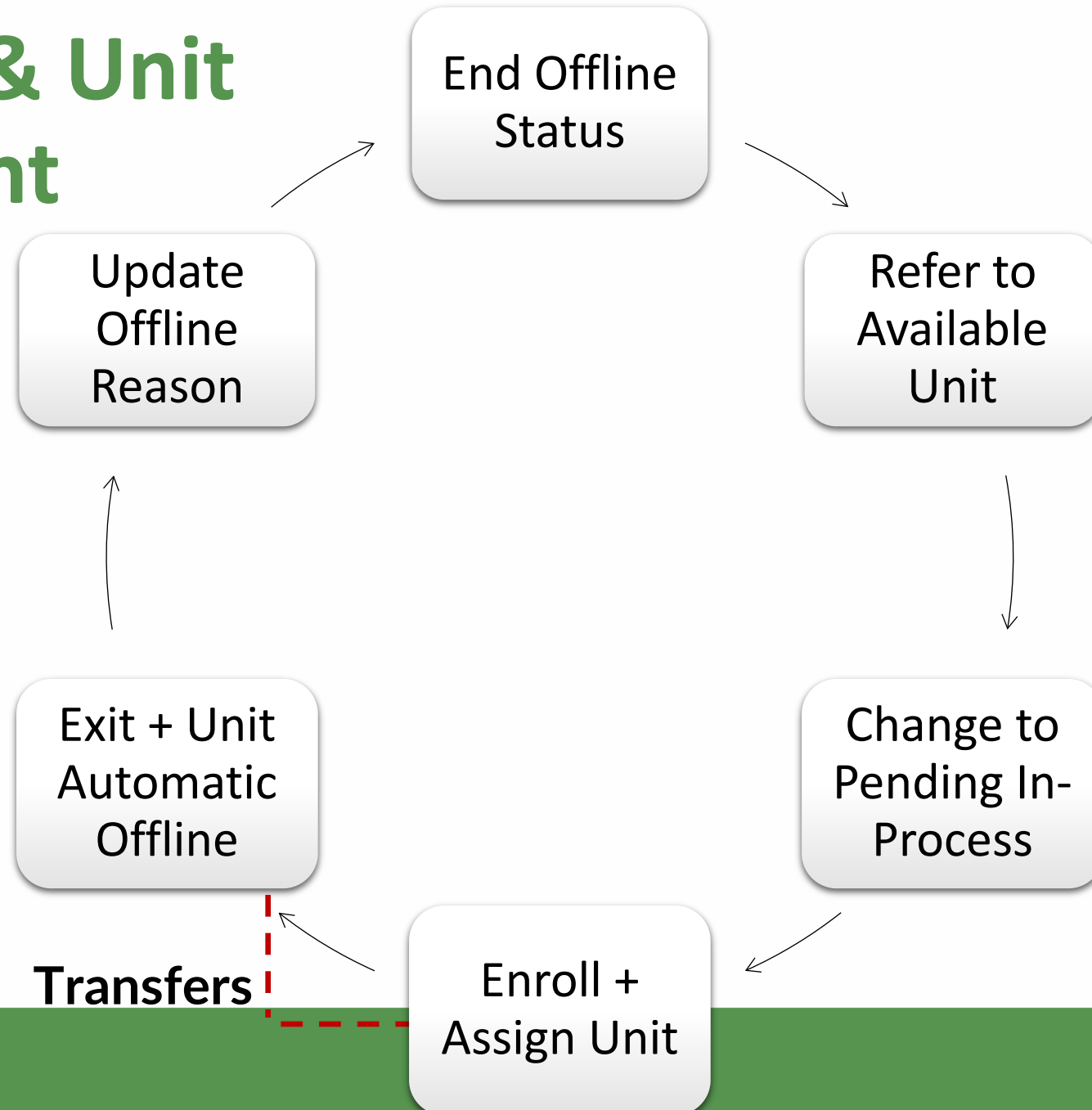
- **Report Library**

- Canned reports available in all Clarity instances
- Accessed under: Reports > Report Library > Category
- Under **Program Based Reports:**
 - **[GNRL-106] Program Roster** - enrollment/exit information and unit assignments
 - **[GNRL-409] Annual Assessment Overview** - information on assessment status for each client

- **Data Analysis**

- Custom San Francisco reports
- Accessed under: Reports > Data Analysis > San Francisco ONE System Reports
- Under **Data Quality Reports:**
 - [Client ROI Audit Report](#)

Transfers & Unit Assignment Updates



Transfers

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

- The same process is used when a client transfers to a different unit within the same program and when a client is initially enrolled and linked to referral to an incorrect unit
- **Step 1:** add End Date for the current unit
 - The unit will automatically be set to offline so the property manager will need to update or end the offline status
- **Step 2:** add Start Date for the new unit that doesn't overlap with the former unit assignment
 - Toggle Eligibility Override ON to select from the Available units.

Transfer to a Different Program

The client will be exited from the former program and enrolled in the new program as they ordinarily would be with the following conditions:

- **Program Exit**, select these options:
 - **Exit Reason:** Unit Relinquished
 - **Exit Destination:** Rental by client, with ongoing housing subsidy
 - **Rental Subsidy Type:** Permanent Supportive Housing
- **Program Enrollment**, select these options:
 - **Prior Living Situation/Type of Residence:** Rental by client, with ongoing housing subsidy
 - **Rental Subsidy Type:** Permanent Supportive Housing
- **Unit Assignment:**
 - Toggle **Eligibility Override**
 - **Housing Move-In Date** will automatically populate

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

Need more help?



- This video and additional training materials available on the [ONESF Help Site](#)
- Contact the help desk:
 - Email onesf@bitfocus.com
 - Call 415-429-4211
 - Click the "Help" button to chat on the [ONESF Help Site](#)
- Drop in to [virtual](#) office hours every 4th Tuesday
- Contact your HSH Program Manager for programmatic assistance if necessary