



# Monthly Agency Leads Meeting

San Francisco, August 2024

# Today's Agenda

Welcome!

System Updates

Deidentifying Profiles in ONE

Annual Assessments

Wrap Up

# Welcome!

What is your favorite fall activity?

--->Please share your name, pronouns, and agency when responding.



# System Updates

---> Federal Report season is coming:

---> LSA: launches in November

---> SPM: launches in early 2025

---> HIC/PIT: launches in Spring 2025

---> **Shelter Inventory** officially launching for MSC-S, Sanctuary, and Next Door on **September 9**



# SSN Update in ONE

CLIENT PROFILE

Social Security Number

Quality of SSN

onesf-train.clarityhs.com says

The SSN entered does not conform to Social Security Administration guidelines. Click 'Cancel' to change the SSN. Click 'OK' to proceed with the SSN entered.

→ As of August 12, SSNs that meet the following conditions **will have x's instead of 0's**:

- SSNs with '0000' for the last four digits are updated so that the last four digits are 'xxxx'
- SSNs with '000' for the first three digits are updated so that the first three digits are 'xxx'
- SSNs with '00' for the middle digits (i.e., digits #4 and #5; the second grouping of digits) are updated so that the middle digits are 'xx'
- SSNs that are '000-00-0000' are updated so that they are 'xxx-xx-xxxx'

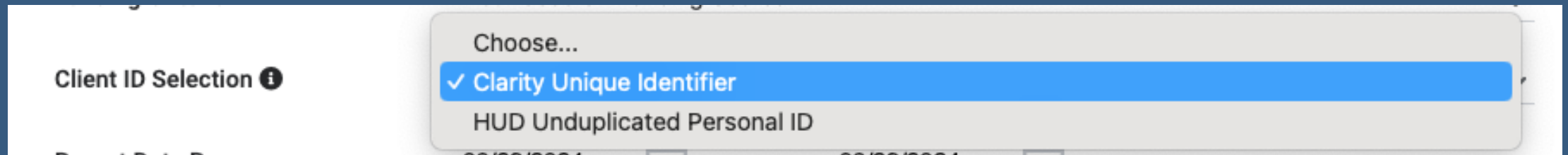
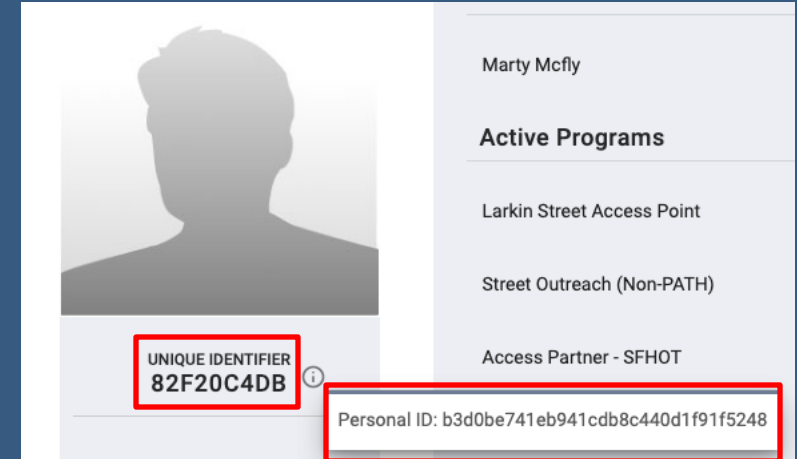
→ Small change that helps the system better comply with updated SSA and HUD Standards.

→ When x's or 0's are entered, new "Warning" message appears to alert users that SSN does not conform with SSA guidelines.

- Click **Cancel** to go back and edit SSN
- Click **OK** to proceed with the SSN entered as is

# New Report Parameter: Client ID Selection

- Now have the choice between 2 options for select reports:
  - **Clarity Unique Identifier**: count of unique profiles in ONE
  - **HUD Unduplicated Personal ID**: count of Client Personal IDs in ONE
- Recommendation is to use Clarity Unique Identifier for reporting





DEPARTMENT OF  
HOMELESSNESS AND  
SUPPORTIVE HOUSING

# Interim De-identified Client Profiles Policy



# Agenda

- What is a de-identified profile?
- How will de-identified profiles be used in the process?
- Who will be impacted by the interim policy?
- Why is this an interim policy?
- Do all survivors need a de-identified profile?
- Protocol
- Policy
- Questions



# What is a de-identified profile?

- A **de-identified** profile in the ONE System has no personally identifiable information such as name, date of birth, addresses, demographic information and social security number. A de-identified profile does produce a unique identifier (UI) in the ONE system which can then be used to track services from the Homelessness Response System.

# How will de-identified profiles be used in the process?

- MJ is a survivor and is being served by Asian Women's Shelter who conducts a Coordinated Entry Assessment. MJ is Housing Referral Status but wants to keep her identity confidential. Asian Women's Shelter can request a de-identified profile from HSH staff on behalf of MJ. HSH creates a de-identified profile for MJ that contains no personally identifying information. The de-identified profile is added to appropriate queue and when it's her turn to be matched to a unit, the staff person responsible for matching, will contact Asian Women's Shelter to connect the Housing Program to MJ.

# Who will be impacted by this interim policy?

Staff with the responsibility to create profiles, match individuals to housing programs including Access Points and Housing Placement Team. Housing Providers who receive referrals through Coordinated Entry including property managers and supportive services. Those impacted will have an additional step in outreaching persons with a de-identified profile that involves contacting the staff person working with that survivor.

# Why is this an interim policy?

HSH is working on a de-identified profile policy for all people experiencing homelessness receiving services from the Homelessness Response System and who have not signed the Homelessness Response System Release of Information. When this policy is released later this summer 2024 it will supersede this interim protocol.

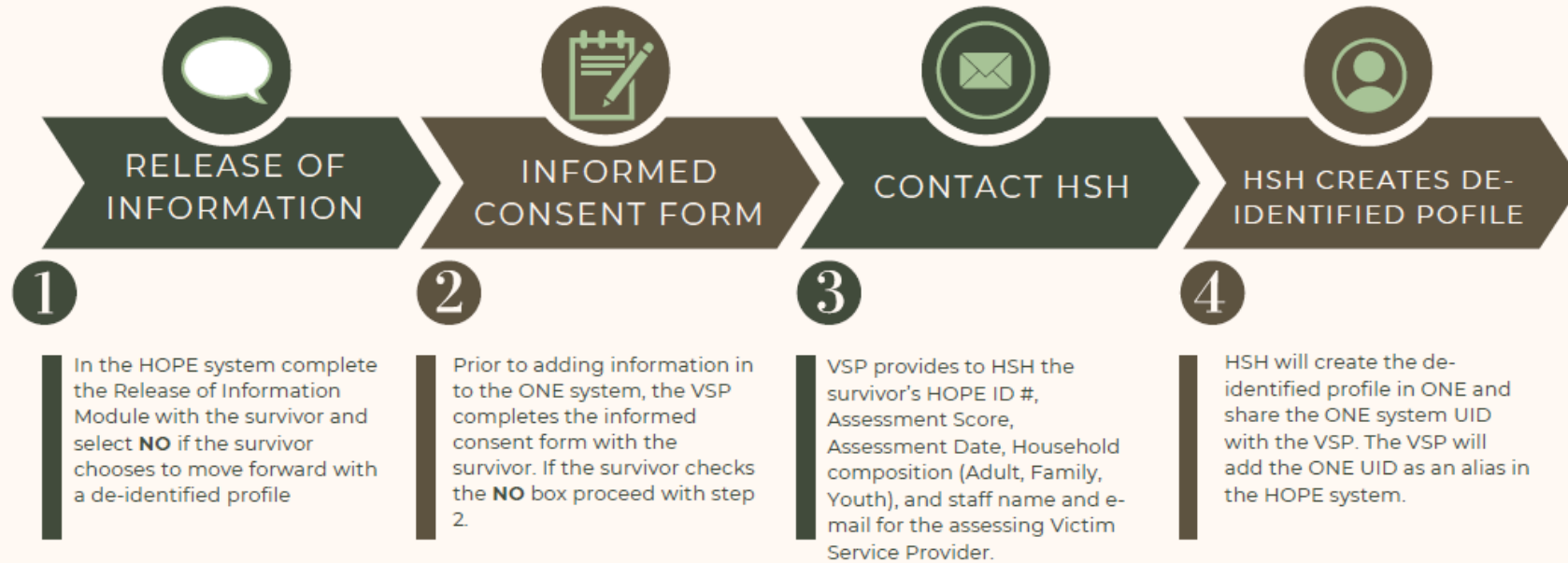
# Do all survivors need a de-identified profile?

- No, it's up to the survivor whether they consent to have personally identifiable information in the ONE system.



# CE FOR SURVIVORS DE-IDENTIFIED PROFILES IN ONE INTERIM PROTOCOL

The following is a guide on how to create a de-identified client profile in ONE when a client does not wish to share personally identifiable information (PII).

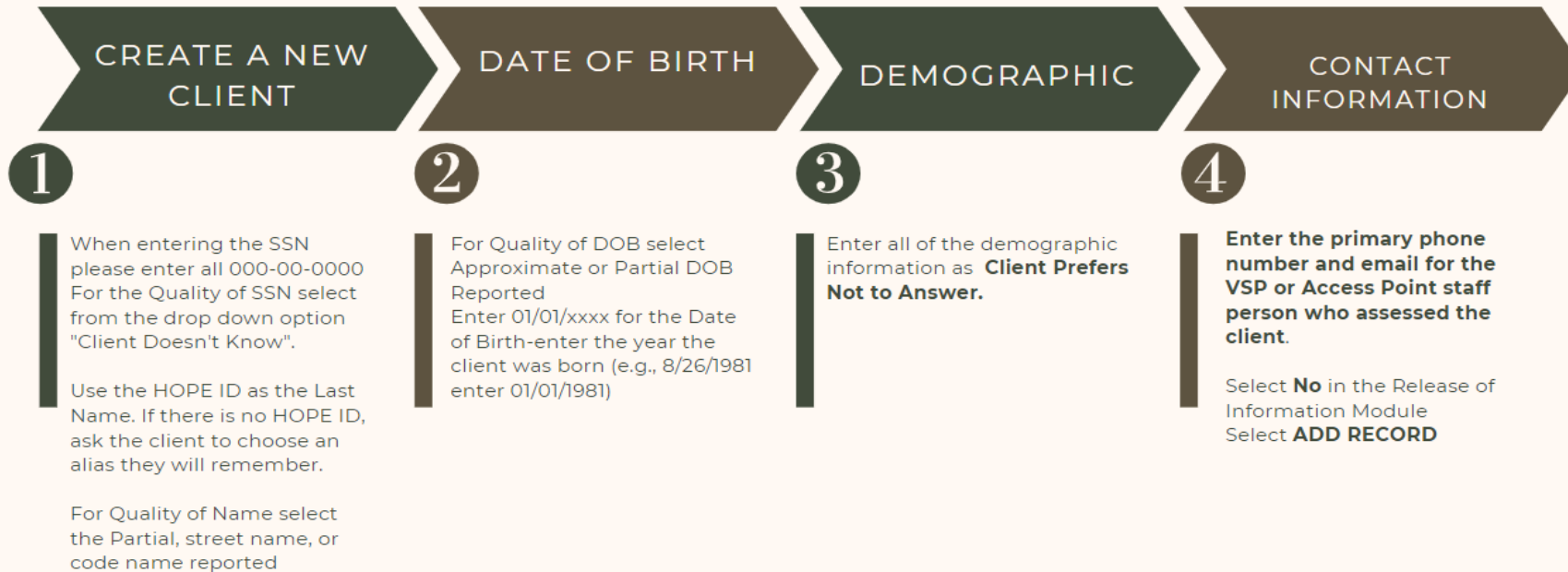




# CE FOR SURVIVORS DE-IDENTIFIED PROFILES IN ONE INTERIM PROTOCOL

The following is a guide on how to create a de-identified client profile in ONE when a client does not wish to share personally identifiable information (PII).

CREATE A NEW CLIENT	<p><b>Quality of DOB</b></p> <p><b>Date of Birth</b></p>	<p>What is the client's current gender identity?</p> <p>What is the appropriate pronoun to use when addressing the client?</p> <p>Race and Ethnicity</p> <p>Additional Race and Ethnicity Detail</p> <p>Primary Language</p> <p>Secondary Language</p>	<p><b>Primary Phone Number:</b></p> <p>Primary Email: _____</p>
<p>Social Security Number</p> <p>Quality of SSN</p> <p>Last Name</p> <p>First Name</p>			



# Interim De-Identified Client Profiles Policy

- The information reviewed in these slides can be found in the [One Page Policy Summary](#) document.
- The [Full Interim Policy](#) document contains more information.





DEPARTMENT OF  
HOMELESSNESS AND  
SUPPORTIVE HOUSING

# Questions?

[HSH.DeidentifiedProfile@sfgov.org](mailto:HSH.DeidentifiedProfile@sfgov.org)


# Annual Assessments

- > Should be completed for all housing program tenants
- > Completed by service providers in ONE
- > Must be completed within 30 days before or after the Head of Household's project start date
- > [Annual Assessment Tip Sheet](#) gives info on how to complete an annual assessment

PROGRAM: KNOX APARTMENTS - COC

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

Add Annual Assessment for client Frida Baggins

Program Date 08/23/2024 

DISABLING CONDITIONS AND BARRIERS

Physical Disability	No	▼
Developmental Disability	No	▼
Chronic Health Condition	No	▼
HIV - AIDS	No	▼
Mental Health Disorder	No	▼
Substance Use Disorder	No	▼
Survivor of Domestic Violence	No	▼

MONTHLY INCOME AND SOURCES

# Assessment Due Warning

---> Reminders can be sent via email that a client/household has an upcoming due date for their annual assessment

---> Steps to enable reminders:

1. Go to your account settings and enable the **Assessment Due Warning** toggle
  - a) Set how many days in advance of the due date you'd like a reminder
2. Go to client enrollment and ensure that:
  - a) You are listed as one of the client's **Assigned Staff**
  - b) The **Assessment due every year Notification** is **ON**

1

Holly Aversano, TRAIN - Fake Example Agency

SEARCH CASELOAD REFERRALS

Change Photo

**ACCOUNT SETTINGS**

SIGN OUT

Assessment Due Warning  1 Day

2

170 DAYS ACTIVE PROGRAM

Program Type: Group (2)

Program Start Date: 01/22/2024

**Assigned Staff:** Holly Aversano

Head of Household: Sam Wise

**Program Group Members**

Sam Wise	01/22/2024	Active
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**Status Assessments** (+)

No Statuses

Assessment due every year Notification: **ON**

# Helpful Reports

## ---> [\[HUDX-227\] Annual Performance Report](#)

- > Found in Reports Library under HUD Reports
- > Useful in identifying all clients served in a program within the report year
- > Lists demographic information and identifies where data errors may have occurred
- > Shows Annual Assessment-based updates

The screenshot displays a web application interface. At the top, there is a user profile for Holly Aversano, Fake Example Agency, with a search bar and a CASELOAD button. A navigation menu is open, showing icons for REPORTS (highlighted with a red box), CALENDAR, and ATTENDANCE. Below the navigation menu, there is a table titled 'REPORT LIBRARY' with the following data:

REPORT LIBRARY	EXPLORE	DATA ANALYSIS
REPORT LIBRARY		
Favorite Reports		0 report(s) ↓
Data Quality Reports		6 report(s) ↓
Service Based Reports		13 report(s) ↓
Program Based Reports		23 report(s) ↓
Assessment Based Reports		4 report(s) ↓
Profile Screen Reports		1 report(s) ↓
Housing		5 report(s) ↓
HUD Reports		8 report(s) ↓
Community and Referrals		9 report(s) ↓
Agency Management		4 report(s) ↓



## Don't forget about Office Hours!

- > ONE System Office Hours occur every 4<sup>th</sup> Tuesday of the month at 2pm
- > Available to everyone who is a user of the ONE System
- > No problem too big, no question too small!
- > Register at [bitfocus.zoom.us/meeting/register/tZcrce-rqTouHNZejrOoeyxlgx7faH4\\_LdNK#/registration](https://bitfocus.zoom.us/join/91226705)

# Announcements

## Monthly Office Hours:

- August 27 @2pm
- September 24 @2pm

## Next Agency Leads Meetings:

- September 23 @10:30am
- October 28 @10:30am

Registration Links: [onesf.bitfocus.com](https://onesf.bitfocus.com)



# Helpful Resources



## ONESF Help Center Website

- [onesf.bitfocus.com](https://onesf.bitfocus.com)

## Bitfocus Help Center

- [help.bitfocus.com](https://help.bitfocus.com)

## Bitfocus Helpdesk

- [onesf@bitfocus.com](mailto:onesf@bitfocus.com)
- 415.429.4211

# Thank You From Your SF Team!



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