DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING

Financial Services for Scattered-Site Providers

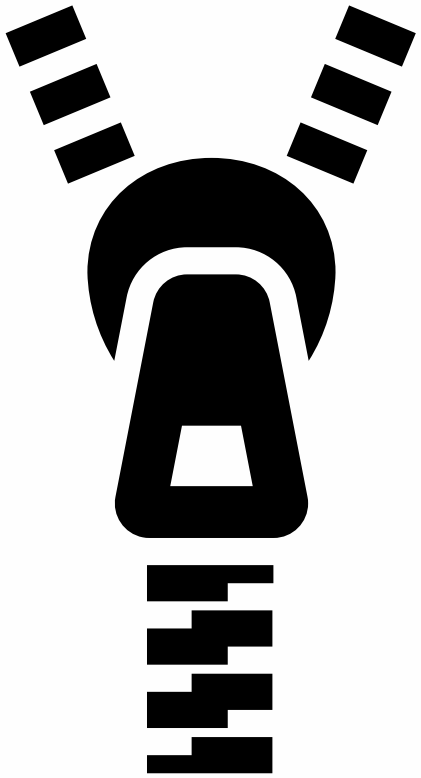
January 29, 2025

Agenda

- Welcome, Background, Expectations
- Implementation timeline
- Overview of Workflow in ONE
- ONE System Demonstration
- Questions
- FAQs

Housing Move-In Financial Support

- Intended to capture costs associated with move-ins for the purpose of advancing racial equity and housing justice.
- Recovering costs and establishing new funding streams
- Future uses may include tracking other financial services not already present in the ONE system



About the Client Population

Any individual who has costs paid as required by landlord for move- in, to establish tenancy, or for services and items necessary to establish a household should have documentation in the ONE system.

About the CalAIM Client Population

1. An individual with active Medi-Cal
2. Who has gone through Housing Navigation* and was authorized for Housing Navigation services *AND*
3. Received Housing Deposit funds to secure housing.

*CalAIM eligible programs are 100% funded by GF and OCOH

Provider Responsibility

- Staff (e.g. financial team, housing locators) will document *Housing Move-In Financial Support* in the ONE system within 3 business days of service **and** prior to program exit.
- Maintain all supporting documentation and records for costs as outlined in HSH contracts

Implementation Timeline

- Go Live on **02/01/2025:** For all individuals who receive a Housing Move-In Financial Support
- CalAIM updates and training will be reviewed at the Community of Practice 02/15 from 2:10 – 3:00 pm. Contact Neha Kapoor [neha.kapoor@sfgov.org] for series calendar invitation

Data Points in the ONE system

- Service Date
- Service Category: *Housing Move-In Financial Support*
- Full cost documentation of Service Items: *Furniture Costs, Housing Deposit and Security Costs, Utilities Costs, and Other Goods*

Housing Deposits Goods and Services

Rental Move-In Amount	Utility Cost Amount	Furniture Cost Amount	Other Goods Amount
Move-in costs required by landlord for occupancy such as: Security deposits required to obtain a lease on an apartment or home First month's rent as required for occupancy	Costs of utilities to establish tenancy which include: Utility Allowances for 1st month Utility set-up fees/ deposits for utilities First month coverage of utilities: •Telephone •Gas, Electricity, Water •Heating <u>One month</u> of arrears if it presents a barrier to establishing utilities in the unit.	Furniture and other household items if reasonable and directly linked to establishing a home *Refer to next slide for a complete list of items.*	Other costs that pose a barrier to establish tenancy e.g. items required by landlord for occupancy, or services needed prior to establishing (or transitioning to) a home 1 month of renter's insurance Application fees First month's coverage of any needed storage fees

Furniture and other household items if reasonable and directly linked to establishing a home such as:

Kitchen items:	Bedroom items	Bathroom items	Living Room items	Other Items
Bowls, can opener, cleaning supplies, cups/glasses, cutlery, cutting boards, dining table/chairs, dish drying rack, dish towels, kitchen utensils, plates, pots and pans, any appliances necessary for food storage and consumption (e.g., microwave, refrigerator, stove, etc.).	Bedding, bedframe, clothes hanger, infant furniture, mattress, nightstand, hypoallergenic mattresses, or pillow covers.	Bathmat, cleaning supplies, shower/bath curtains, toiletries, towels.	Coffee/end tables, couch, lamps/lighting	Air conditioners, air filters, carbon monoxide detectors, heaters, night lights, smoke detectors, trash cans, vacuum cleaners.

What should *not* be included?

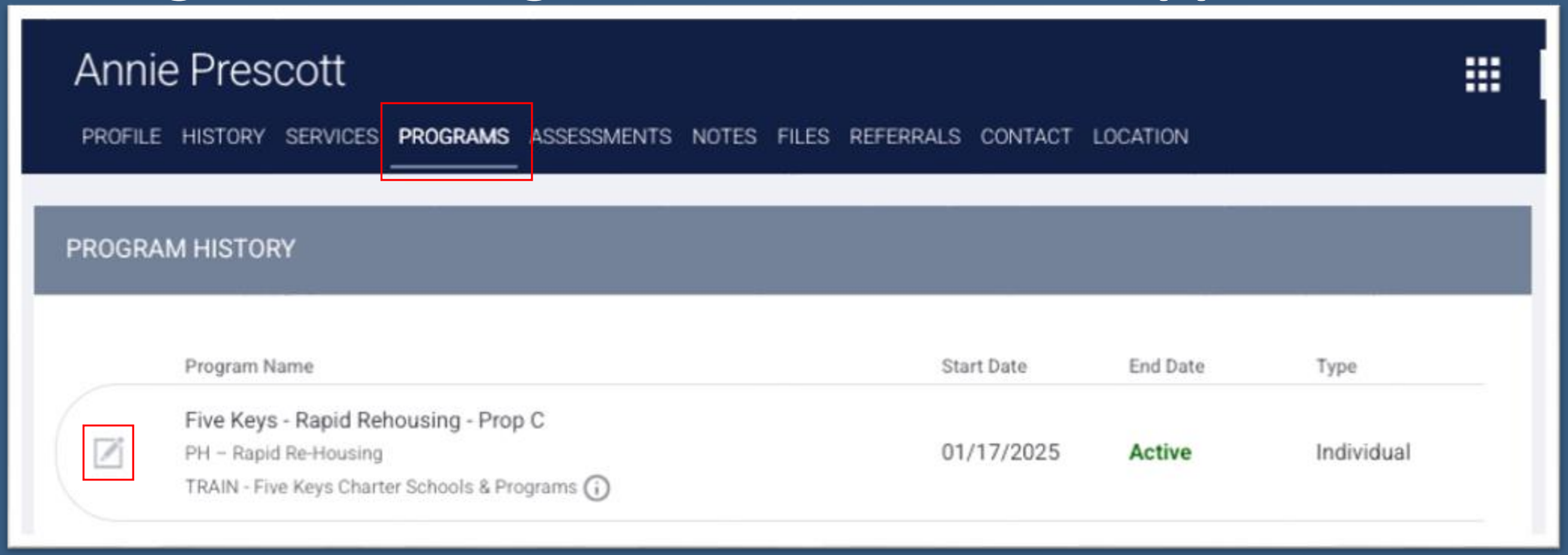
- Renting a truck or storage pod to support with the move
- Hiring movers to support with the move
- Items that are not a part of established provider services

New Service: Housing Move-In Financial Support

- New financial Service to track agency spending related to housing move-in costs under CalAIM.
- Captures exact spending amounts and expense dates

Bitfocus

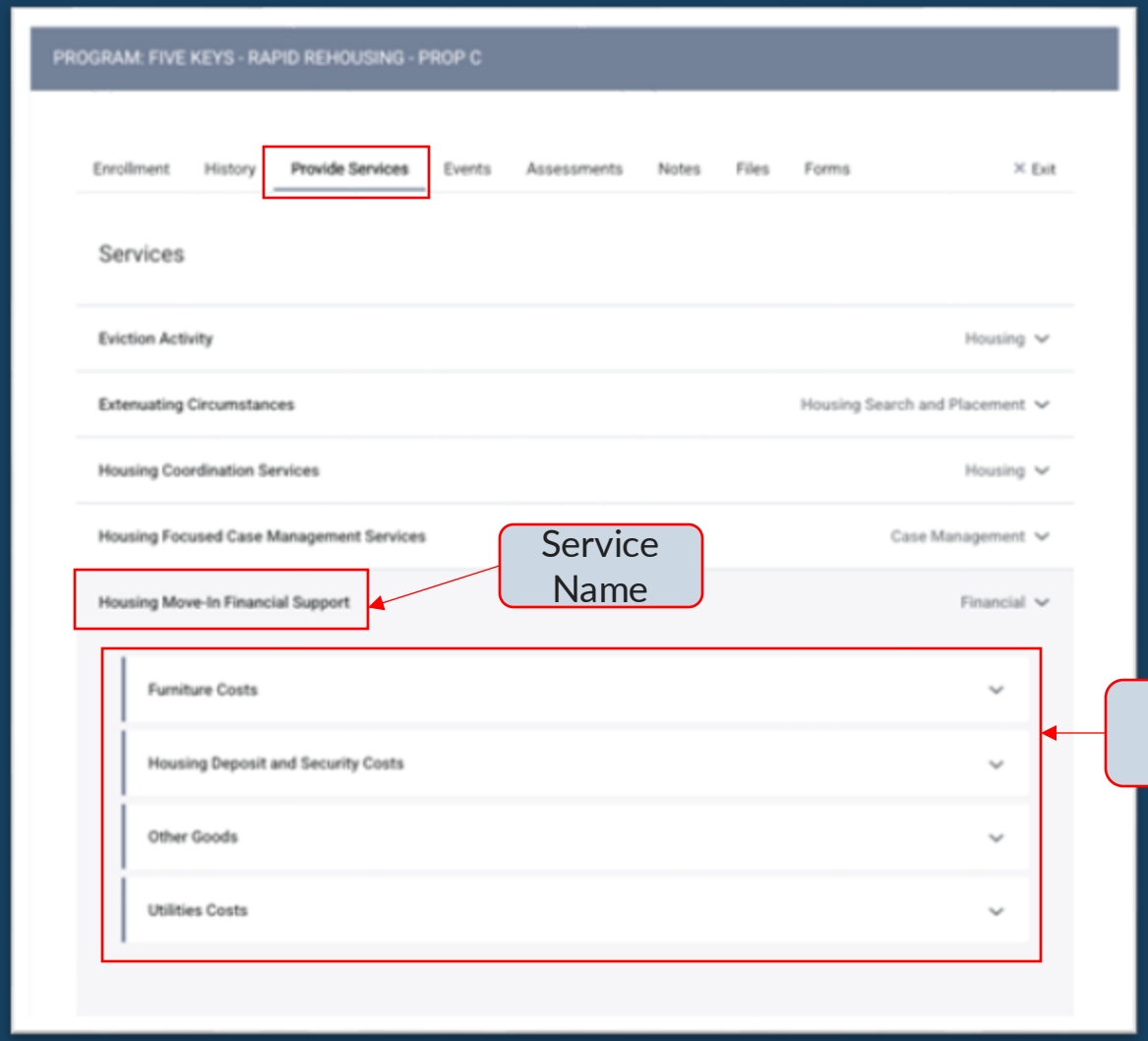
Accessing the Housing Move-In Financial Support Service



- From a client's profile, select the Programs tab
- Select the program enrollment you want add the service to by clicking on th icon
- This service is only available under specific programs

Bitfocus

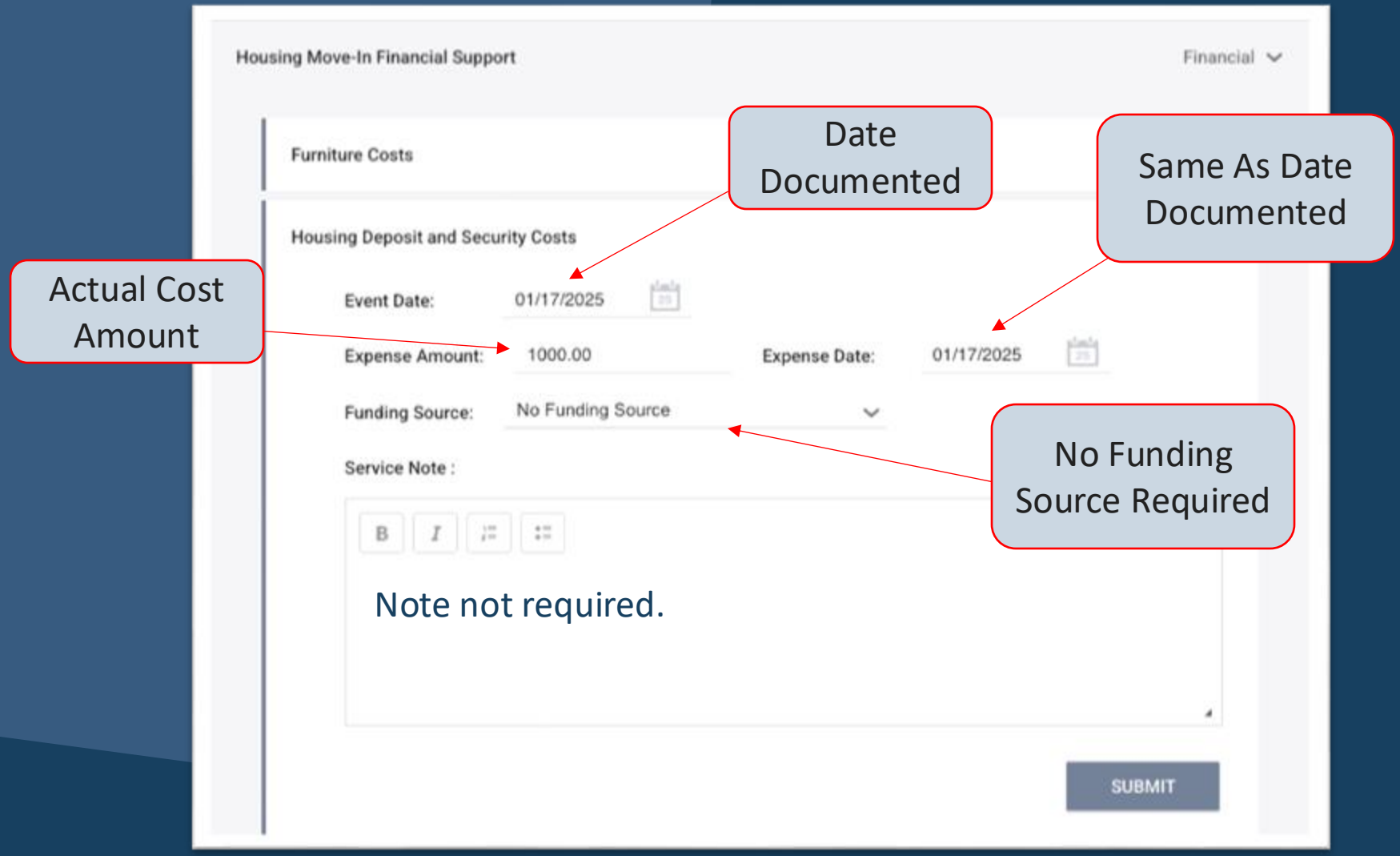
Accessing the Housing Move-In Financial Support Service



- Within the program enrollment, select the *Provide Services* tab
- Select the "Housing Move-In Financial Support" service
- Select the appropriate service item to record your service:
  - Furniture Costs
  - Housing Deposit and Security Costs
  - Other Goods
  - Utilities Cost

Bitfocus

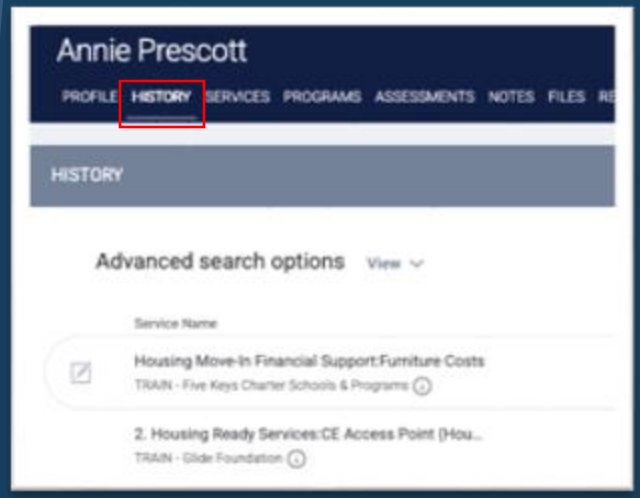
Documenting Costs

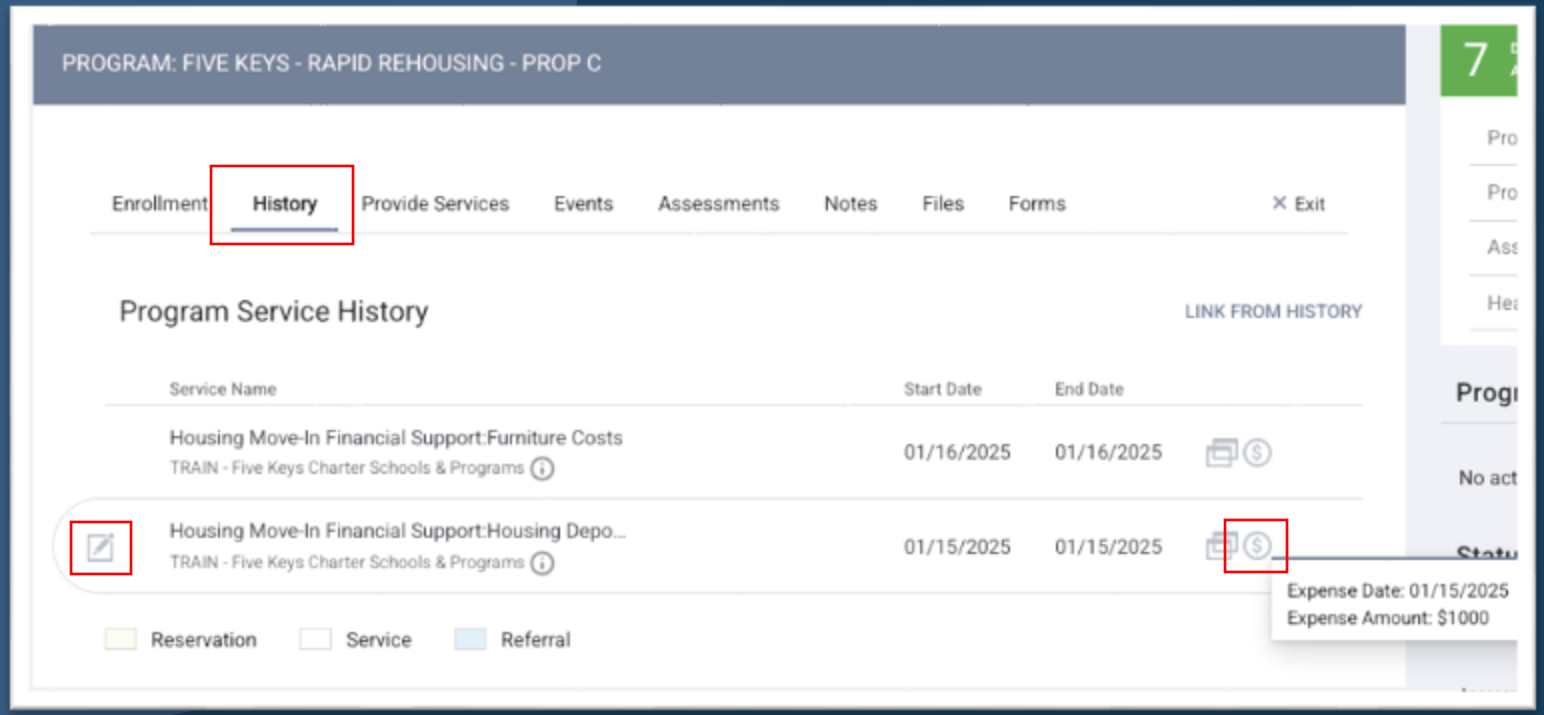


Bitfocus

Reviewing Cost History

- Previously recorded services can be found in the *History* tab within the program enrollment
  - Can also be found under the *History* tab on the client's profile
- Hover over the $ icon to see the expense date and amount
- Click on the edit icon to edit the service





Bitfocus

Editing Costs

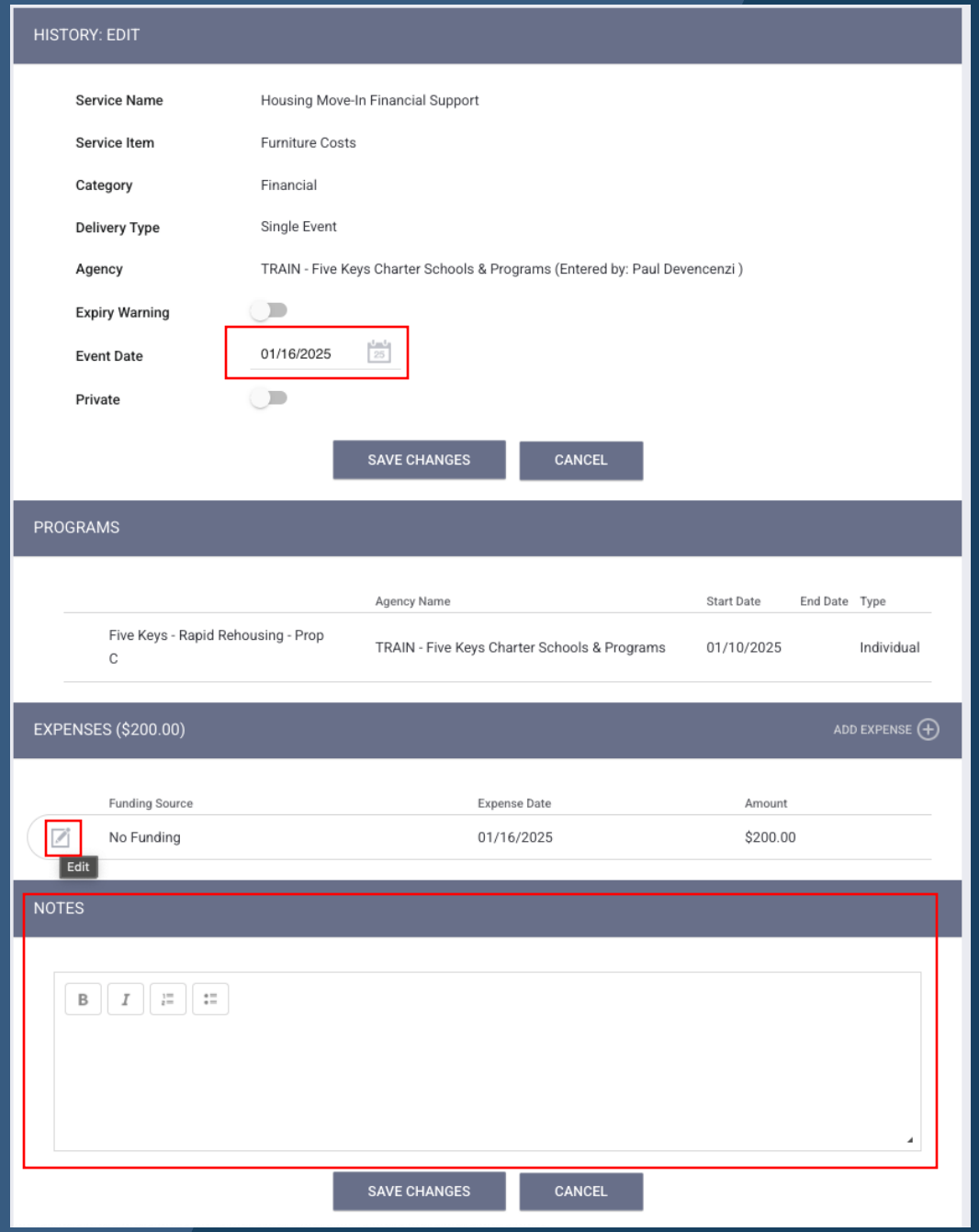
- Costs can not be entered retroactively after program exit
- Costs can not be deleted
  - Duplicate costs should be adjusted to $0
  - Ask Bitfocus' Support Services to remove any services that need to be deleted onesf@bitfocus.com 415.429.4211

Scenario: Costs for Furniture have been entered 2 times. Therefore, second entry should be changed to $0

Bitfocus

Editing Costs

- To edit the Event Date or Service note, make the changes on the edit screen.
- Click on the icon next to the expense you want to edit within the service.
  - This will bring up the Modify Expenses popup

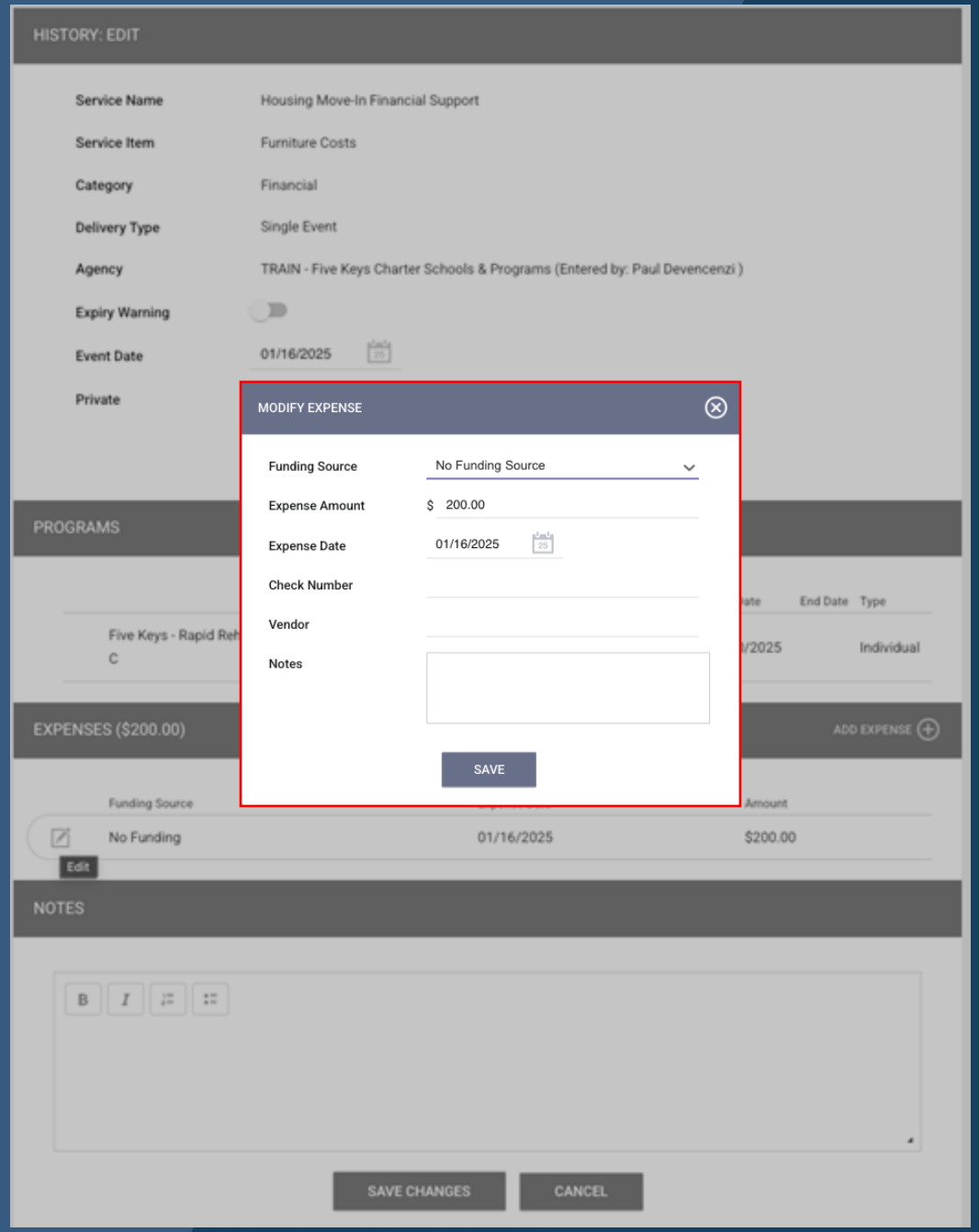


Bitfocus

Editing Costs

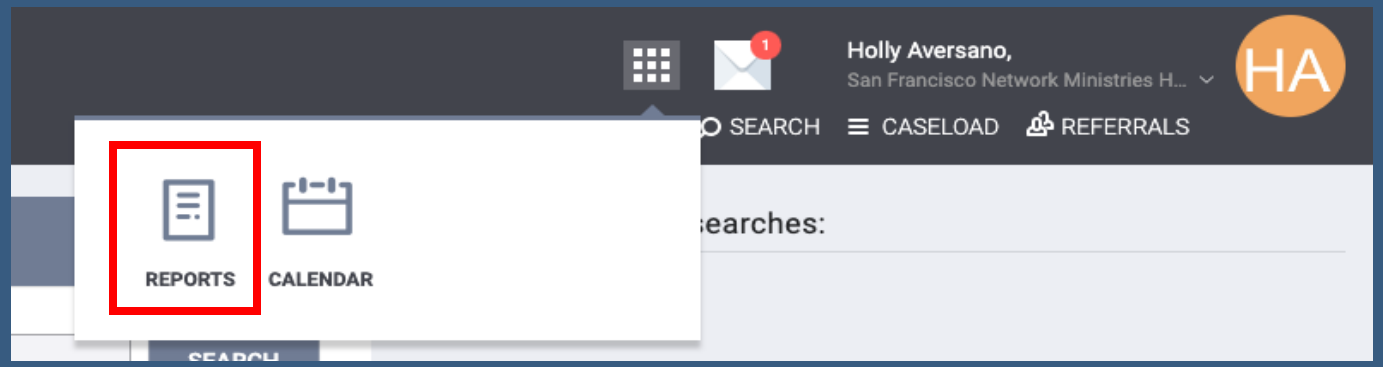
- The following elements can be edited within the Modify Expense popup box:
  - Funding Source
  - Funding Amount
  - Expense Date
- Click on “Save” within the Modify Expenses box, then either of the “Save Changes” buttons to complete editing the service

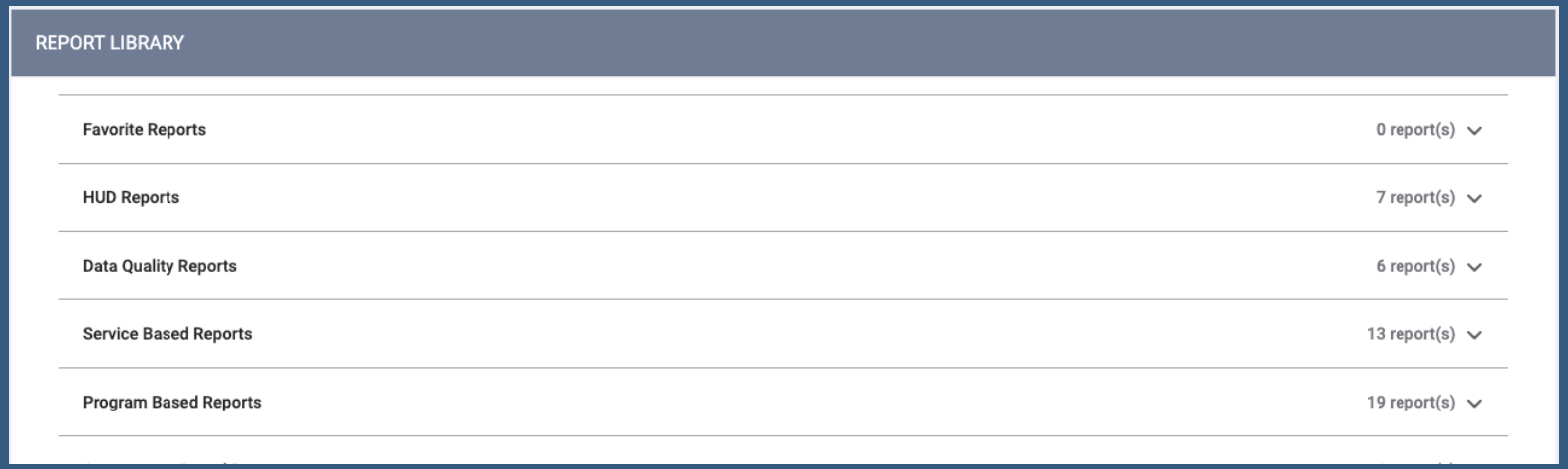
If you are editing an event or expense date, make sure both dates match before saving the service



Bitfocus

Reports Library



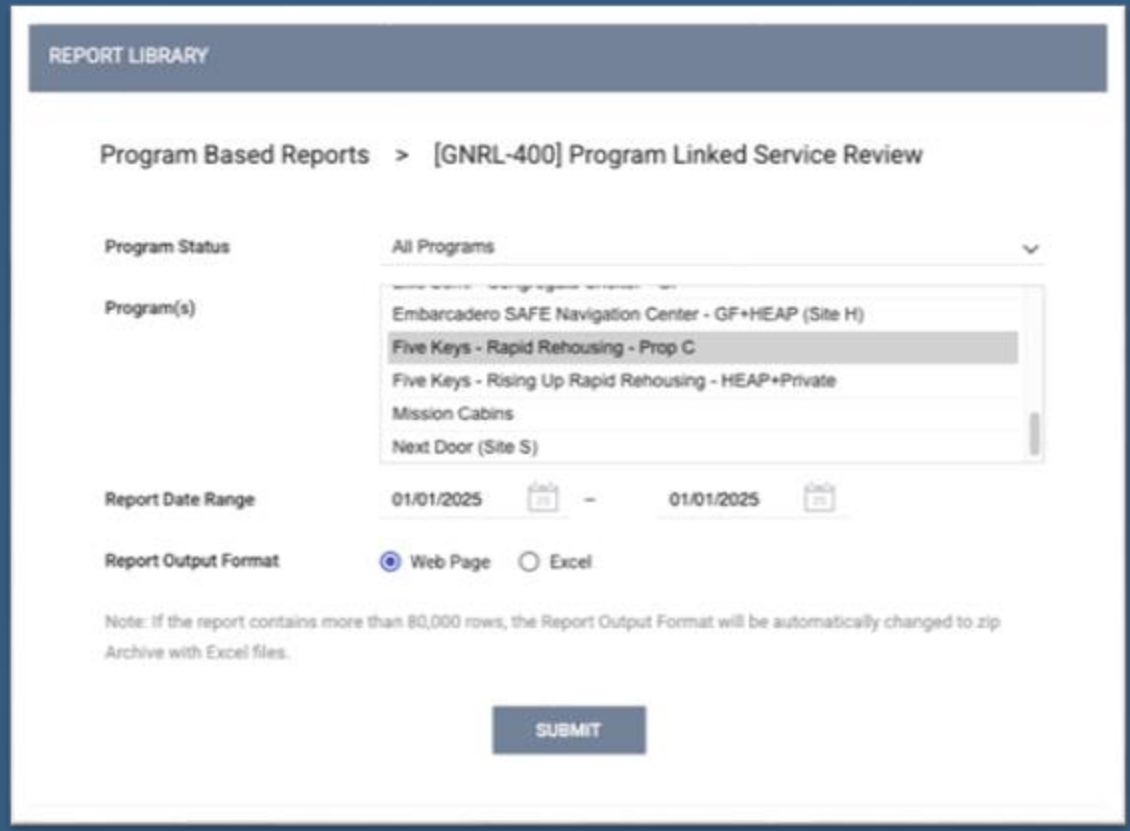


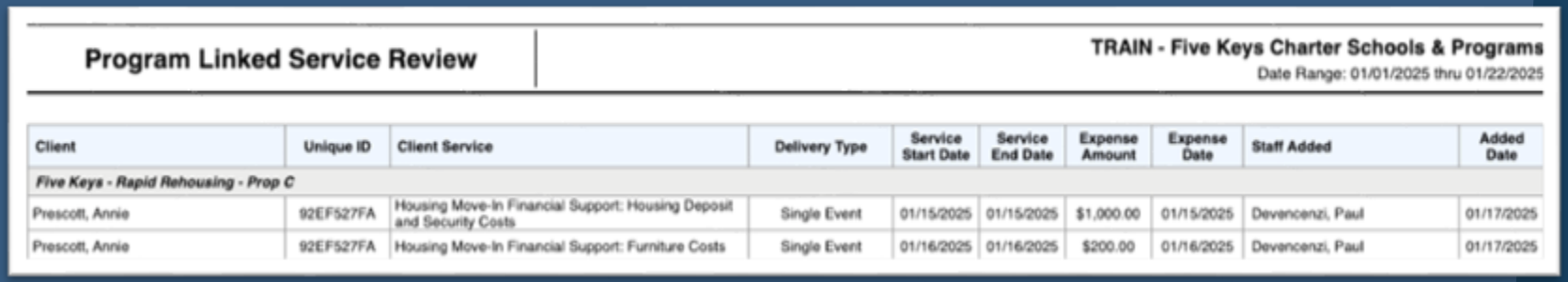
- Contains ready made or "canned" reports
- To access, click the Reports icon from the Launchpad.
- Ability to "Favorite" reports

Bitfocus

Program Linked Service Review

- [GNRL-400] Program Linked Service Review
  - Found in Reports Library under Program Based Reports
  - Select the program the services were completed under and the date range.
  - Provides list of all services linked to the selected program(s).
  - Clients are separated by a color block and services are listed by date provided.





Program Linked Service Review

TRAIN - Five Keys Charter Schools & Programs

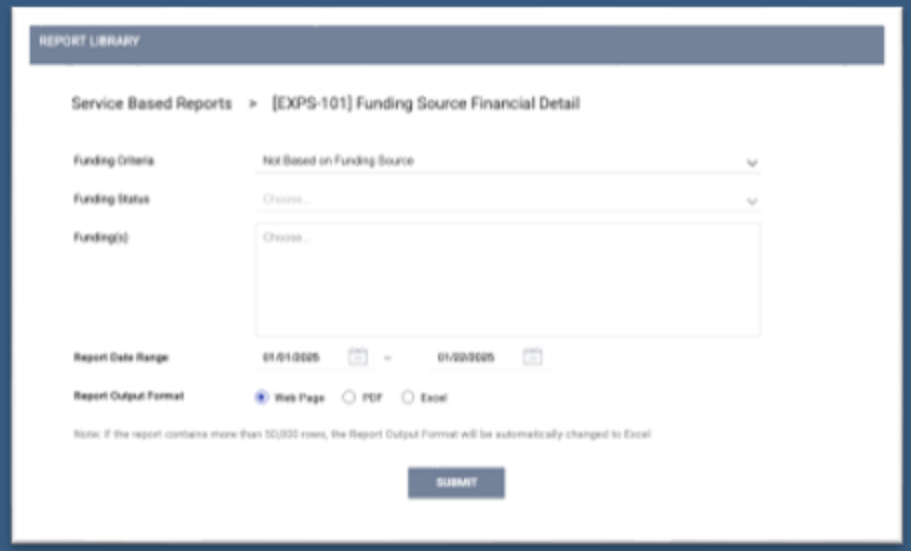
Date Range: 01/01/2025 thru 01/22/2025

Client	Unique ID	Client Service	Delivery Type	Service Start Date	Service End Date	Expense Amount	Expense Date	Staff Added	Added Date
Five Keys - Rapid Rehousing - Prop C									
Prescott, Annie	92EF527FA	Housing Move-In Financial Support: Housing Deposit and Security Costs	Single Event	01/15/2025	01/15/2025	$1,000.00	01/15/2025	Devencenzi, Paul	01/17/2025
Prescott, Annie	92EF527FA	Housing Move-In Financial Support: Furniture Costs	Single Event	01/16/2025	01/16/2025	$200.00	01/16/2025	Devencenzi, Paul	01/17/2025

Bitfocus

Funding Source Financial Detail

- [EXPS-101] Funding Source Financial Detail
  - Found in Reports Library under Service Based Reports
  - Select “No Funding Source” as the funding criteria
  - Provides details of an agency’s funding source and history of the associated service expenses for a specific range.
  - Reported is divided according to service and service item



Funding Source Financial Detail

TRAIN - Five Keys Charter Schools & Programs
Date Range: 01/01/2025 thru 01/22/2025
No Funding Source

Service: Housing Move-In Financial Support

Service Item: Furniture Costs

UID	Name	Notes	Vendor	Check No.	Check Date	Month Pd.	Funding Source	Amount
92EF527FA	Prescott, Annie				01/16/2025	January	No Funding Source	$200.00

Service Item Totals: $200.00

Service Item: Housing Deposit and Security Costs

UID	Name	Notes	Vendor	Check No.	Check Date	Month Pd.	Funding Source	Amount
92EF527FA	Prescott, Annie				01/15/2025	January	No Funding Source	$1,000.00

Service Item Totals: $1,000.00

Service Totals: $1,200.00

Totals: $1,200.00

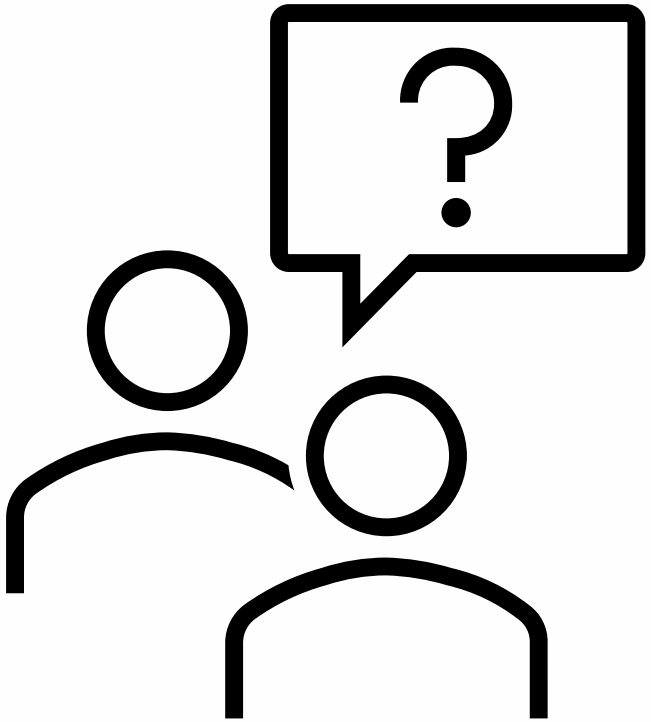
Current Funding Totals

NOTE: Current fund available totals are not reflective of the date range of this report but an actual total of the status of funds available as of the current date

Fund Name	Fund Amount	Total Available
No Funding to Display...		

Bitfocus

Questions



DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING

FAQs

Program Monitoring

- Programs will primarily be monitored by the Scattered- site team
- Please reach out to your HSH Program Manager if you have questions

CalAIM Temporary Monitoring

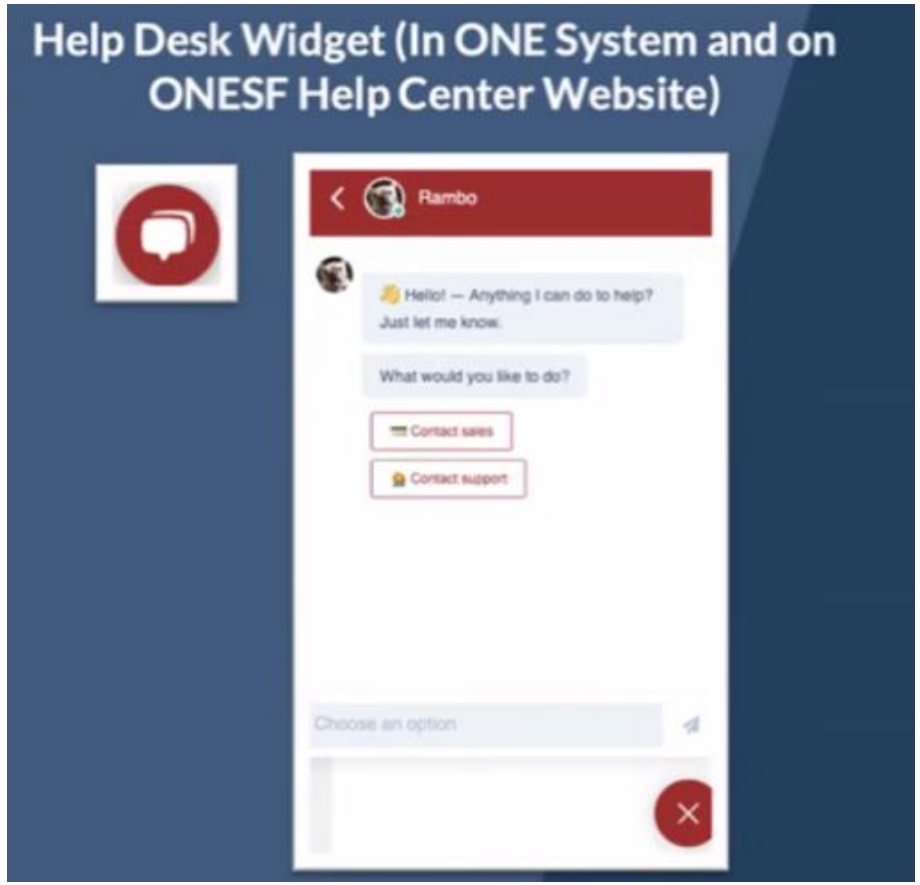
- CalAIM Team will:
  - Create a checklist of necessary documents and datapoints
    - Landlord Tax ID
    - Client address
    - Documentation of rental agreement e.g. signature page of lease
    - Documentation of costs – could be housing costs summary letter, utilities info, etc.
  - Create CalAIM External BOX folders for each CBO fiscal Agent.
  - Document agreements and expectations with CBOs and Program Managers re: process, timeline, and communication.
  - Identify points of contact for CBOs and HSH Programs.

Resources

- Office hours to support with this new process
- Job aid designed by the CalAIM Team (in development)
- Trainings and updates will be reviewed at the Community of Practice or other provider monthly meetings as needed
- CalAIM Provider Manual by 2025

Bitfocus

- Help Desk:
  onesf@bitfocus.com
  415.429.4211
- ONESF Help Center Website
  onesf.bitfocus.com



Accessing this training in the future

- https://onesf.bitfocus.com/
- SSHP External Box folder can be accessed here

Contact Information for CalAIM Team at HSH

- Jessie Shimmin (she/her)

  CalAIM Manager

  Jessica.Shimmin@sfgov.org

- Nisha Anand (she/her)

  File exchanges, Data Systems, Authorization and Billing

  Nisha.Anand@sfgov.org

- Minx Manuel (she/her)

  Housing Deposits, Tenancy and Sustaining Services

  Minx.Manuel@sfgov.org

- Neha Kapoor (she/her)

  Community of Practice, Housing Transition and Navigation Services

  Neha.Kapoor@sfgov.org

DEPARTMENT OF
HOMELESSNESS AND
SUPPORTIVE HOUSING

Thank You