Monthly Agency Leads Meeting

San Francisco, October 2024

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Today's Agenda

Welcome

System Updates

ONE System User Survey

ONE System Auto-exit Thresholds: Review and Update

Wrap Up

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Welcome!

What's your favorite Halloween tradition?

⋯→Please share your name, pronouns, and agency when responding.

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System Updates

⟶ Federal Report season is here:

    ⟶ LSA: launches Nov 4, 2024

    ⟶ SPM: launches in early 2025

    ⟶ HIC/PIT: launches in Spring 2025

⟶ Inventory launched for Adult Shelters

⟶ Family Shelter Inventory coming soon

2024 ONE System User Survey

- **We value your feedback!**
  - Survey aims to gather information about your experience with the ONE System, including but not limited to:
    - Trainings
    - Resources
    - Your user experience of ONE
- Completely anonymous
- 15 mins or less to complete
- Feedback will go directly into improving ONE System trainings and resources
- Please complete and share with your agency staff
  - Click here for survey
  - Emailed to all users on October 16th

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ONE System Auto-exit Thresholds: Review and Update

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What are auto-exit thresholds?

- Auto-exit thresholds are set at 3 levels in ONE:
  - **Program**
  - **Community Queue**
  - **Program Referral**
- These thresholds determine how long a client can be in a program, on a queue, or have a pending program referral with no qualifying action before being auto-exited.

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Current auto-exit threshold settings

Category	Program/Queue	Auto-exit Threshold
Program Enrollment	All CE Programs	90 days
Community Queue	-CAAP PSH Queue -Permanent Supportive Housing Queue -Rapid Rehousing Queue -Temporary Shelter Queue	90 days
	-Transfer Queue (HSH Only)	180 days
	-SFHA - EHV	720 days
Pending Program Referral	-CAAP PSH Queue -Permanent Supportive Housing Queue -Rapid Rehousing Queue -Transfer Queue (HSH Only)	180 days
	-Temporary Shelter Queue	90 days
	-SFHA - EHV	1 day

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What is a Qualifying Action?

→ A Qualifying Action is any action made on a client's record that resets the "clock" and prevents an auto-exit in ONE

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Updates to Qualifying Actions as of October

Activities that now keep a client active in program or on the queue:

⇢ Adding or Editing a location on the Location tab

⇢ Adding or Editing a contact on the Contact tab

⇢ Editing records (i.e. services, events, notes, enrollments etc) now counts as a qualifying action

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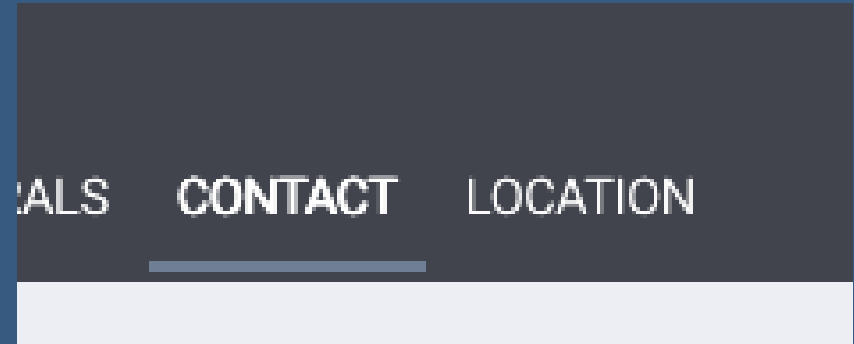
Qualifying Actions

Actions to prevent auto-exit from a Program Enrollment:

⟶ Adding/editing a program level Service

⟶ Adding/editing an Event

⟶ Adding/editing a program level CE Assessment

⟶ Adding/editing a Status Assessment

⟶ Adding/editing an Annual Assessment

⟶ Adding/editing a Current Living Situation Assessment

⟶ Adding/editing a Unit/Bed to the program enrollment

⟶ Adding/editing a location to the Location tab

⟶ Adding/editing a contact to the Contact tab

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Qualifying Actions (cont.)

Actions to prevent auto-exit from a Community Queue:

⤑ Adding/editing a Service (client level and program level)

⤑ Adding/editing an Event

⤑ Adding/editing a CE Assessment (client level and program level)

⤑ Adding/editing a Status Assessment or Annual Assessment for a client

⤑ Adding/editing a contact to the Contact tab

⤑ Adding/editing a location to the Location tab

⤑ Adding/editing a File (client level and program level)

⤑ Adding/editing a note (client level and program level)

⤑ Adding/editing an alert

⤑ Enrolling a client into a program or editing a client enrollment

⤑ Exiting a client from a program or editing a client exit

⤑ Creating a direct program referral

⤑ Selecting the "CHECK-IN" button within the referral

Additionally, the threshold "clock" is reset when a referral returns to the queue as a result of a denial/expiration or is placed on the queue as the result of a transfer from another queue.

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Qualifying Actions (cont.)

Actions to prevent auto-exit from a Pending Program Referral:

┄→ Changing the Referral Status from "Pending" to "Pending – In Process" (Note: once a referral is set to "Pending – In Process," it never automatically expires)

REFERRAL: EDIT

Client	Joshua Tree
Referred Program	DSCS/SVdP Housing Navigation
Referred to Agency	[TRAINING] San Francisco Adult Coordinated Entry Agency
Referring Agency	[TRAINING] San Francisco Adult Coordinated Entry Agency
Referred Date	09/17/2020 1:03 PM
Days Pending	946 day(s)
In Process	836 day(s)
Qualified	Reassigned
Adult Priority score	63
Referred by Staff	Swati Pande ⓘ
Case Manager	Select ⌄
Last Activity	02/08/2022 CHECK-IN
Status	✓ Pending
	Pending – In Process
	Denied
	Expired
Private	

SAVE CHANGES   CANCEL

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Additional Resource

ONE System Coordinated Entry & Community Queue Auto-Exit Threshold Settings

![Bitfocus logo]

Don't forget about Office Hours!

→ ONE System Office Hours occur **every 4th 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

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Announcements

Monthly Office Hours:
- November 26 @2pm

Next Agency Leads Meetings:
- November 25@10:30am

Registration Links: onesf.bitfocus.com

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Helpful Resources

ONESF Help Center Website

- onesf.bitfocus.com

Bitfocus Help Center

- help.bitfocus.com

Bitfocus Helpdesk

- onesf@bitfocus.com
- 415.429.4211

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Thank You From Your SF Team!

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