



Youth Coordinated Entry

ONE System Training



Gain an understanding of the Coordinated Entry (CE) process

Understand roles and responsibilities of CE staff

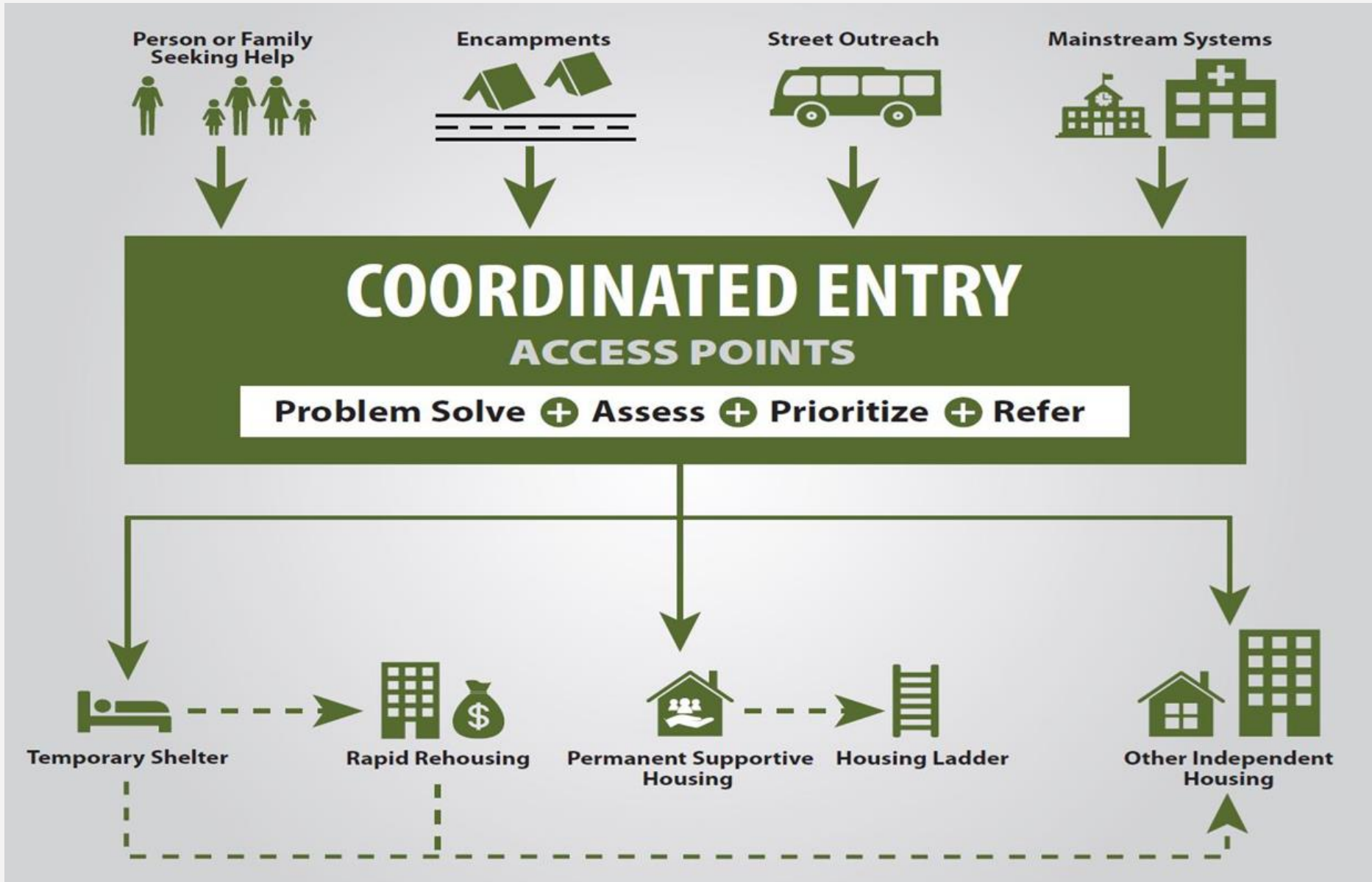
Understand tasks as they relate to CE

Understand documentation processes

Observe Access Point workflow in the One System



Getting Started in Coordinated Entry



Getting Connected to Coordinated Entry

Household connect with CE through various ways:

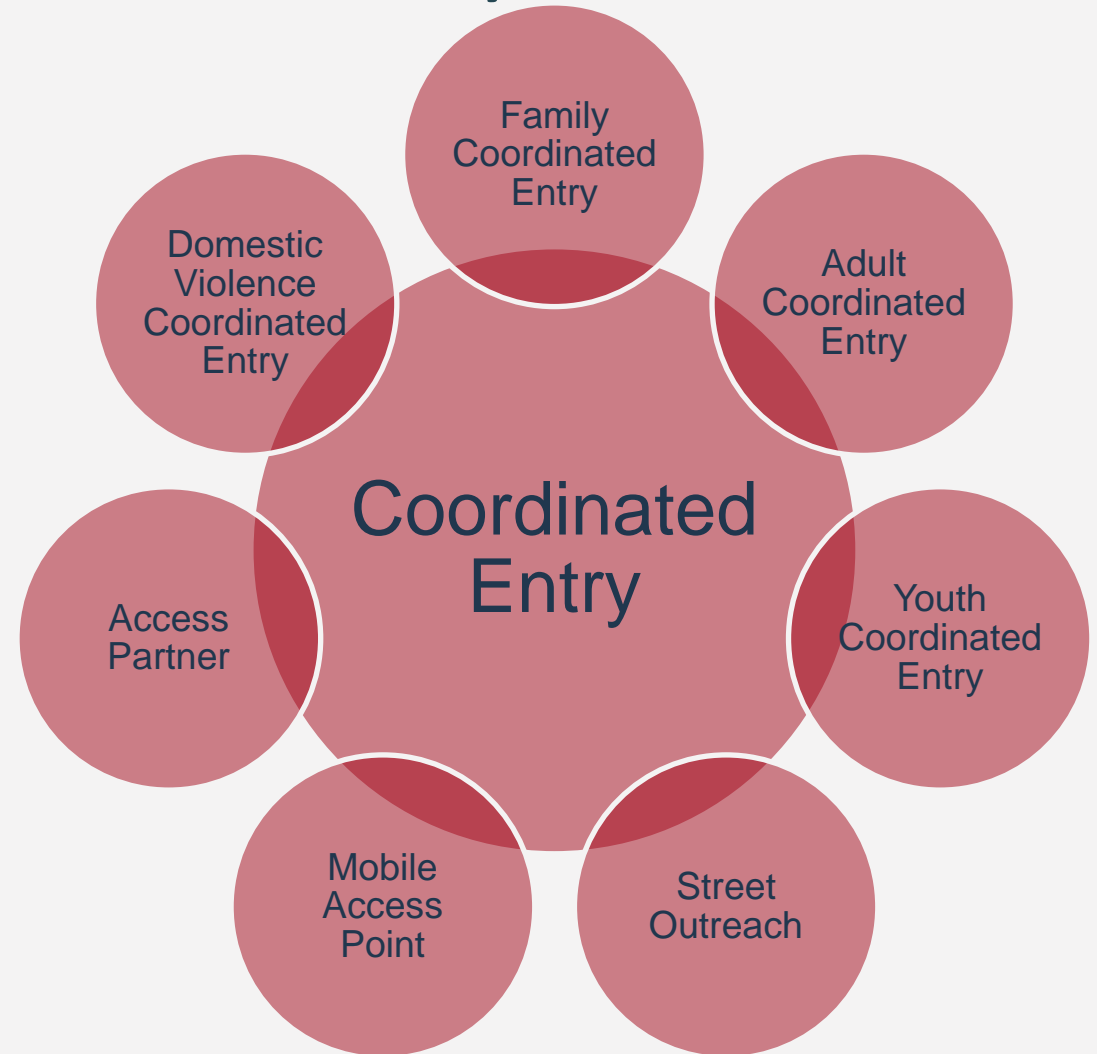
Access Point

- Families with children under 18 directed to Family Access Points
- Transitional Age Youth (18-24) and (25-27) can choose between the Adult and Youth Access Points
- Adults over the age 18 without minor children directed to Adult Access Points
- People and Families fleeing violence directed to Domestic Violence Access Points

Outreach team

- SFHOT
- Mobile Access Points
- Access Partners

Once determined eligible for CE, a household is entered into ONE if they aren't currently in system



Getting ONE System Access

1. Complete the required trainings outlined below. Depending on your Access Role, additional trainings may be required.
 - Clarity Human Services General Training
 - SFDPH Privacy Training
2. Notify your Agency Lead of completion
3. Request your Agency Lead contact the Bitfocus Help Desk at onesf@bitfocus.com or (415) 429-4211 to request a new ONE System user account for you. The Agency Lead will need to provide the following information:
 - Username
 - User email
 - Access role



For more information, please visit - <https://onesf.bitfocus.com/new-user-info>



Navigating the ONE System

Navigating ONE

Youth Coordinated Entry work should be completed under the San Francisco Youth Coordinated Entry Agency



If you have access to multiple agencies, you will need to switch to the
San Francisco Youth Coordinated Entry agency

Looking up households in ONE

- Once determined eligible for CE, a household is entered into ONE if they aren't currently in system
- Search for household/ head of household
 - Search by name, DOB and SSN
- If unable to find head of household, create a new profile



SEARCH FOR A CLIENT

ADD CLIENT +

Search by name, partial name, DOB or SSN

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

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Recover deleted data

Duplicate Profiles

- If you discover multiple profiles in ONE for a household:
 - Please contact the Bitfocus Help Desk (onesf@bitfocus.com) to get the records merged together
 - Provide the unique identifiers for each profile and identify the master profile
- In the example below, you will notice that one profile has the name misspelled but it is the same household

| flowers | | | | |
|----------------|--|------------|------|--------------|
| Daisy Flowers | | 04/01/1999 | 1111 | |
| Diasy Flowers | | 04/01/1999 | 1111 | |
| Spring Flowers | | 06/17/1988 | 9922 | Last Updated |
| Daisy Flowers | | 04/01/99 | 1111 | 04/01/19 |
| Diasy Flowers | | 04/01/99 | 1111 | 09/05/19 |
| Spring Flowers | | 06/17/88 | 9922 | 06/17/19 |

powered with Clarity Human Services



Creating New Profiles

SEARCH FOR A CLIENT

ADD CLIENT +

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

- Create a new profile if you can definitively confirm that your household is unique
- Collect as much information as possible, avoid using “Client refused” or Data Not Collected” whenever possible
 - For existing profiles, review and confirm that all information is correct

CREATE A NEW CLIENT

Social Security Number

Quality of SSN

Last Name

First Name

Quality of Name

Quality of DOB

Date of Birth

Middle Name

Gender

Race

Ethnicity

Please fill in Release of Information form

De-Identified Profiles

When entering the SSN please enter all 000-00-0000 For the Quality of SSN select from the drop down option "Client Doesn't Know".

Use the HOPE ID as the Last Name. For the First Name enter the word HOPE.

For Quality of Name select the Partial, street name, or code name reported

For Quality of DOB select Approximate or Partial DOB Reported Enter 01/01/xxxx for the Date of Birth-enter the year the client was born (e.g., 8/26/1981 enter 01/01/1981)

Enter all of the demographic information as **Client Prefers Not to Answer.**

Enter the primary phone number and email for the VSP staff person who assessed the client.

Select **No** in the Release of Information Module Select **ADD RECORD**

- De-identified profiles will be used for survivors of violence that do not wish to have their information put into ONE. Survivors of violence can choose at any time what types of PII they do or do not want to have shared in the ONE System.
- ONE System users will not be able to search for them using PII such as name, partial name, date of birth, or social security number. However, ONE System users will be able to search for an individual by the Unique Identification number (UID#) that the ONE System randomly generates for each client profile.
- Contact would be facilitated through a third party such as a case manager or advocate working with the individual or household.

Release of Information

When creating a new profile, ONE will prompt you to have the household sign a Release of Information

RELEASE OF INFORMATION

| | | |
|---------------|----------------------|------|
| Permission | Yes | ▼ |
| Start Date | 09/05/2019 | 📅 25 |
| End Date | 09/05/2029 | 📅 25 |
| Documentation | ✓ Select | ✓ |
| | Electronic Signature | |

ELECTRONIC SIGNATURE FORM

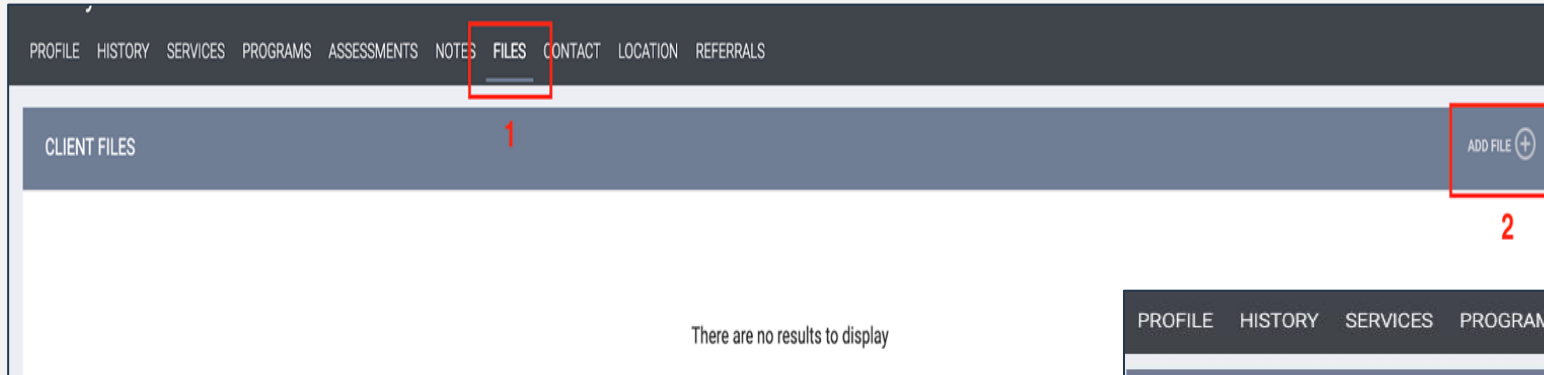
By completing this form, you are certifying the client:

- 1) was notified of the Department of Homelessness and Supportive Housing Notice of Privacy Policy
- 2) completed the Release of Information: Homeless Response System as required for the ONE System
- 3) reviewed the Release of Information: Human Service Agency.

Any signed Release of Information forms must be uploaded in client files.

SAVE CANCEL

Uploading ROIs



1. To upload an ROI, select the Files tab
2. Select the categories for Release of Information
 - Homeless Response System
 - Human Services Agency

A screenshot of the 'UPLOAD A FILE' form. The form has a dark header with the text 'UPLOAD A FILE'. Below the header, there are several fields and controls:

- Category:** A dropdown menu with 'Release of Information' selected.
- Predefined Name:** A dropdown menu with 'Release of Information: Homeless R' selected.
- File:** A 'Select File' button.
- Private:** A toggle switch that is currently turned off.

At the bottom right of the form, there are two buttons: 'SAVE CHANGES' and 'CANCEL'.

Update Contact and Location Information

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES **CONTACT** LOCATION REFERRALS

CLIENT CONTACTS ADD CONTACT +

ADD CONTACT

Contact Type

- Aunt/Uncle
- Case Manager
- Child
- ✓ Client
- Client- Work
- Client- Cell
- Doctor
- Employer
- Emergency Contact
- Friend
- Grandparent
- Guardian
- Niece/Nephew
- Parent
- Sibling

More than one contact can be added. Be sure to select a contact type from the drop down

Email

Phone (#1)

Phone (#2)

Active Contact

Private

Contact Date

Note

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES **LOCATION** REFERRALS

CLIENT LOCATION ADD ADDRESS + ↗

For mobile team, the arrow can be used to mark the exact location you met with the client.

ADD CLIENT LOCATION

Address Type

Name

Address (line 1)

Address (line 2)

City

State

Zip Code

Location Date

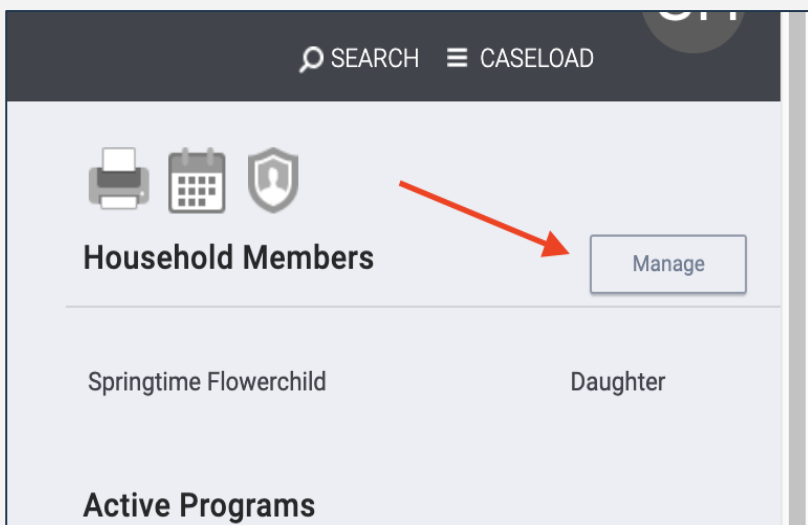
Active Location

Private

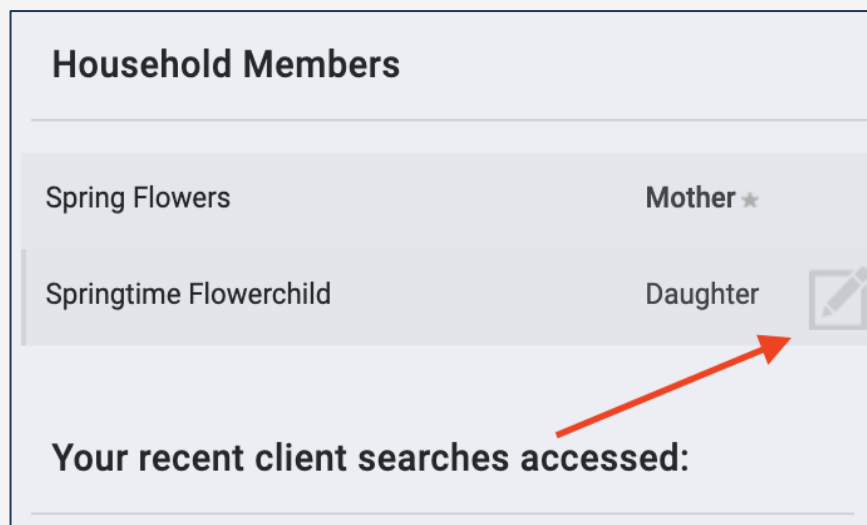
Note

Managing Households

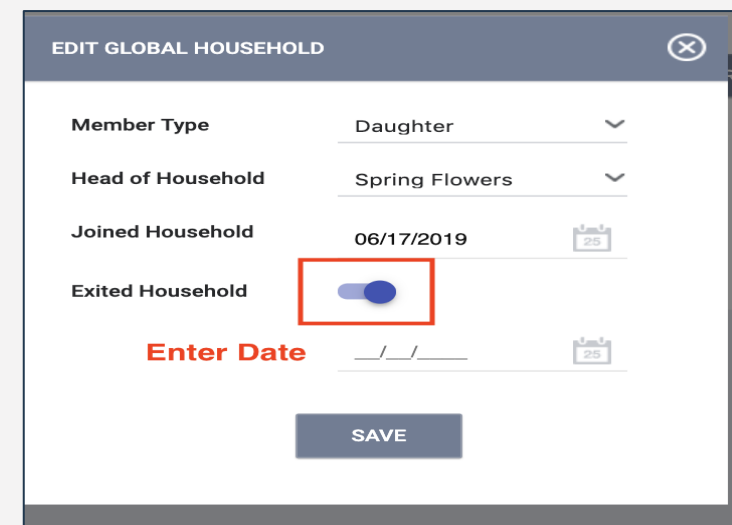
If there are 2 or more in a household but one person is moving forward individually, you will need to remove the household as a family member in ONE



1

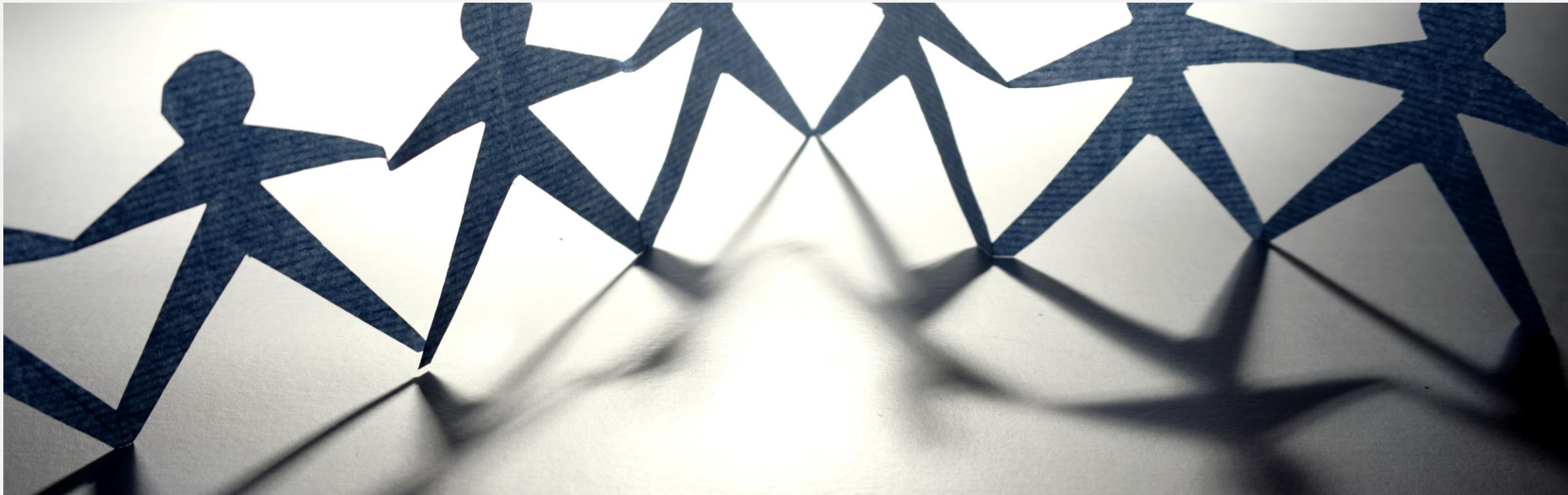


2



3





Enrollments

Coordinated Entry Enrollment

All households who are eligible for CE should be enrolled into a CE program

Enrollments are completed to show that households are actively being engaged by the Homelessness Response System

Eliminates duplication of staff efforts and burden on the household

Information cascades forward to other fields/screens in ONE

HUD requirement

Coordinated Entry Enrollment in ONE

PROGRAM HISTORY

| Program Name | Start Date | End Date | Type |
|---|------------|------------|------------|
| Swords Rapid Resolution Program [TRAINING] Swords to Plowshares | 10/01/2019 | Active | Individual |
| LYRIC Access Point [TRAINING] San Francisco Youth Coordinated Entry Agency | 09/12/2019 | 10/07/2019 | Individual |

PROGRAMS: AVAILABLE

Select the drop down next to the program corresponding to the access point you work at

| | |
|---------------------------|---|
| ECS: Bayview Access Point | ▼ |
| ECS: Mobile Access Point | ▼ |
| ECS: SOMA Access Point | ▼ |
| Housing Stabilization | ▼ |
| Problem Solving | ▼ |
| SFHOT Access Point | ▼ |

LYRIC Access Point

Active Clients

2 CLIENTS

- 0 % Families
- 100 % Individuals

Funding Source
Other (N/A)

Service Categories:
✓ Housing Search and Placement
✓ Outreach Contact
✓ Other


Availability
Limited Availability

PROGRAM AVAILABILITY:
▶ Available openings 0

[PRINT DIRECTIONS](#) [DOC REQUIREMENTS](#) [ENROLL](#)

Coordinated Entry Enrollment in ONE

Enroll Program for client Freddy Fox

Program Entry Date 08/27/2019 

DISABLING CONDITIONS AND BARRIERS

Disabling Condition

Physical Disability

Developmental Disability

Chronic Health Condition

HIV - AIDS

Mental Health Problem

Substance Abuse Problem

Victim of Domestic Violence

CASH INCOME FOR INDIVIDUAL

Income from Any Source

NON-CASH BENEFITS

Receiving Non-Cash Benefits

HEALTH INSURANCE

Covered by Health Insurance

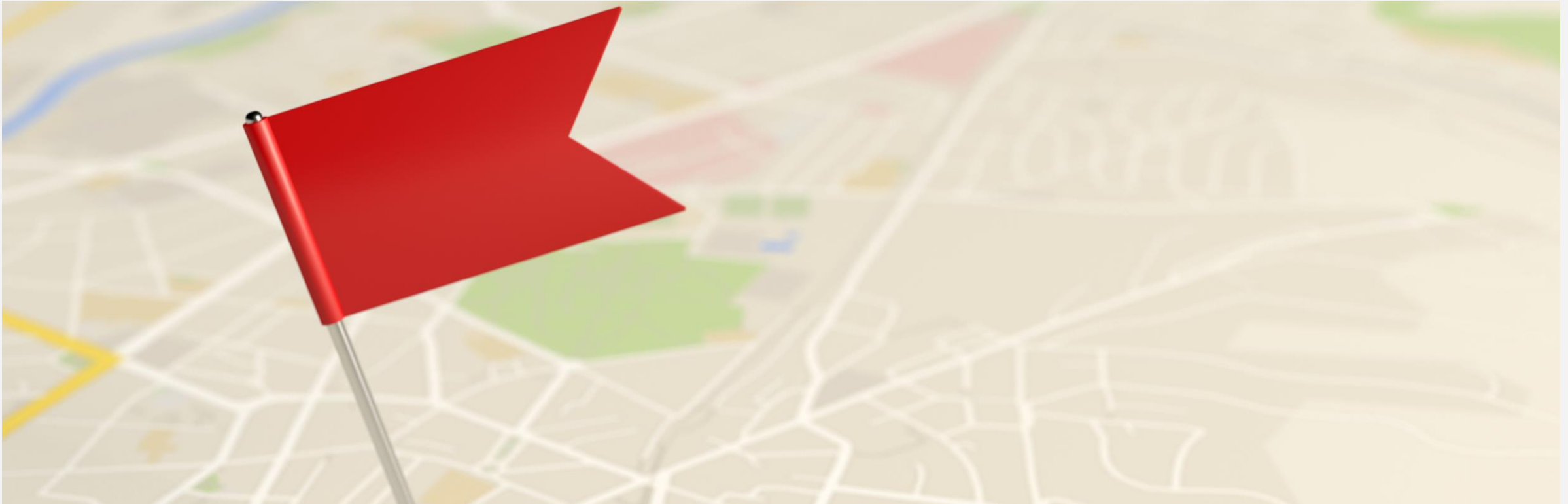
If any of the fields auto-populated from a previous enrollment, please confirm the information is still up to date.

Complete all fields when possible. Try to avoid selecting "Data not collected" when possible.

[Audit Log](#)

aged with Clarity Human Services





Current Living Situation Assessment

Current Living Situation Assessment

REQUIRED

- Used to regularly document the following:
 - The current living situation of people experiencing homelessness
 - Homeless chronicity
 - Risk of imminent homelessness
- Used to understand how many times a person is engaged while experiencing homelessness
- For Coordinated Entry, record a CLS anytime any of the following occurs:
 - Project Start (enrollment into CE program)
 - A CE Assessment or CE Event is recorded; or
 - The household's living situation changes



Current Living Situation Assessment

The screenshot displays a web application interface for managing program assessments. At the top, a navigation menu includes 'PROFILE', 'HISTORY', 'SERVICES', 'PROGRAMS', 'NOTES', 'FILES', 'CONTACT', 'LOCATION', 'REFERRALS', and 'ASSESSMENTS'. The 'PROGRAMS' menu item is highlighted with a red box. Below this is a 'PROGRAM HISTORY' section with a table listing programs. The first row is 'ECS: Bayview Access Point' with a red box around its edit icon. A modal window titled 'PROGRAM: ECS: BAYVIEW ACCESS POINT' is open, showing a sub-menu with 'Assessments' highlighted. Below the sub-menu is an 'Assessments' section with a green bar for 'Current Living Situation'. A separate modal window titled 'ADD PROGRAM ASSESSMENT' is shown, featuring a radio button for 'Pita Pocket' and a highlighted 'ADD CURRENT LIVING SITUATION' button.

| Program Name | Start Date | End Date | Type |
|---|------------|----------|------|
| ECS: Bayview Access Point [TRAINING] San Francisco Adult Coordin | | | |
| Swords Rapid Resolution Program | | | |

PROGRAM: ECS: BAYVIEW ACCESS POINT

Enrollment History Provide Services **Assessments** Notes Files Forms × Exit

Assessments

Current Living Situation

ADD PROGRAM ASSESSMENT ×

Pita Pocket Grandchild

ADD CURRENT LIVING SITUATION


Current Living Situation Assessment

Living Situation verified by field should be the program that verified the person living situation.

Examples:

- Nav Center staff informed the AP that the household is staying the Nav Center. Verified by would be the appropriate Nav Center.
- The household self reported the are sleeping in their car. Verified by would be the AP program where the household was seen.

Add Current Living Situation for client Cedar Fever

Date of Contact 10/24/2019 

Current Living Situation Place not meant for habitation (e.g., a vehicle, an abandoned buildir

Living Situation Verified By Bayview Access Point

Location Details

CA-501


- Coordinated Entry
 - [TRAINING] Always Awesome Agency
 - [TRAINING] Department of Homelessness and Supportive ...
 - [TRAINING] San Francisco Adult Coordinated Entry Agency
 - [TRAINING] San Francisco Family Coordinated Entry Agency
 - [TRAINING] San Francisco Youth Coordinated Entry Agency
- Emergency Shelter
 - Sarah Smith Housing Services
 - [TRAINING] Department of Homelessness and Supportive ...
 - [TRAINING] Dolores Street Community Services
 - [TRAINING] Emergency Solutions Grant
 - [TRAINING] ESC Agency

Clarity Human Services

Current Living Situation Assessment

Add Current Living Situation for client Pita Pocket

Additional questions may populate based on the client's responses

| | |
|---|--|
| Date of Contact | 10/14/2019  |
| Current Living Situation | Hospital or other residential non-psychiatric medical facility <input type="text"/> |
| Living Situation Verified By | ECS: Bayview Access Point <input type="text"/> |
| Is client going to have to leave their current living situation within 14 days? | Yes <input type="text"/> |
| Has a subsequent residence been identified? | Select <input type="text"/> |
| Does individual or family have resources or support networks to obtain other permanent housing? | Select <input type="text"/> |
| Has the client had a lease or ownership interest in a permanent housing unit in the last 60 days? | Select <input type="text"/> |
| Has the client moved 2 or more times in the last 60 days? | Select <input type="text"/> |
| Location Details | <input type="text"/> |

Documenting Refusals

Ensure a client is enrolled in a Youth CE program. On the client profile page, click the **PROGRAMS** tab.

Minnie Mouse

PROFILE HISTORY SERVICES PROGRAMS NOTES FILES ASSESSMENTS LOCATION CONTACT REFERRALS

CLIENT PROFILE

| | |
|------------------------|--------------------|
| Social Security Number | XXX - XX - 5678 |
| Quality of SSN | Full SSN Reported |
| Last Name | Mouse |
| First Name | Minnie |
| Quality of Name | Full name reported |

Click the pencil icon to open program enrollment.

Minnie Mouse

PROFILE HISTORY SERVICES **PROGRAMS** NOTES FILES ASSESSMENTS LOCATION CONTACT REFERRALS

PROGRAM HISTORY

| Program Name | Start Date | End Date | Type |
|---|------------|----------|------------|
| Larkin Street Access Point Coordinated Entry TRAIN - San Francisco Youth Coordinated Entry Agency | 03/07/2024 | Active | Individual |

Documenting Refusals Cont

Click **Events** tab to select Coordinated Entry Events and then click the arrow next to **Referral to Housing Navigation project or services**.

PROGRAM: LARKIN STREET ACCESS POINT

Enrollment History Provide Services **Events** Assessments Notes Files Forms × Exit

Coordinated Entry Events

Problem Solving/Diversion/Rapid Resolution intervention or service ▼

Referral to Street Outreach project or services ▼

Referral to Housing Navigation project or services ▼

***** For Aarti refusals, use the following Refused Housing Referral options to document refusal reason.**

Refused Housing Referral: Other Refusal Reason ▼


Refused Housing Referral: Prefer a Different Neighborhood ▼

Refused Housing Referral: Prefer a Different Building ▼



Refusal Notes

In the Event Note section, identify that the household refused Aarti referral and the specified reason. Once completed, click **SUBMIT**.

Refused Housing Referral: Prefer a Different Building ^

Date 03/11/2024 

Event Note:

B *I*  

The household refused the Aarti referral due to not having access to their own kitchen and bathroom.

SUBMIT

Documenting Refusals for Undocumented Youth

Select Refusal for Documentation from the options

- Refused Housing Referral: Other Refusal Reason
- Refused Housing Referral: Prefer a Different Neighborhood
- Refused Housing Referral: Prefer a Different Building

Refused Housing Referral: Prefer a Different Building

Date: 03/11/2024

Event Note:

B *I* u **≡**

The household refused the Aarti referral due to not having access to their own kitchen and bathroom.

SUBMIT

Input "Not documentation status ready" in note for events.

Refusals Report

Click **WAFFLE** to access reports

San Francisco Youth Coordinated Entry Agency

3646 Loretta Vallot, San Francisco Youth Coordinated E... ▾

SEARCH CASELOAD REFERRALS

Click **DATA ANALYSIS** tab and scroll down to **YOUTH CES** reports.

RUN Aarti Denials List report

San Francisco Youth Coordinated Entry Agency

REPORT LIBRARY EXPLORE DATA ANALYSIS

| Youth CES | |
|--|-------|
| Aarti Denials List | ⊙ RUN |
| YCE Pending & Pending I/P Referrals Dashboard | ⊙ RUN |
| YCE_ServiceObjectivesDashboard | ⊙ RUN |
| YCE_User Notes from Last 42 Days | ⊙ RUN |
| Youth CE | ⊙ RUN |
| Youth Flex Pool & RRH Housing Program Openings | ⊙ RUN |
| Youth Homelessness Response Dashboard | ⊙ RUN |
| Youth Open PSH Units | ⊙ RUN |



Problem-Solving Services and Events

| Problem-Solving Services and Events | Where to find them? |
|---|---------------------|
| Problem Solving Financial | Services Tab |
| Problem Solving | Events Tab |
| Problem Solving Conversation | Events Tab |
| Problem Solving Housing Location Assistance | Events Tab |
| Problem Solving Mediation Services | Events Tab |



Coordinated Entry Events Tab

Document outreach attempts for the Aarti, Artmar, and other housing opportunities, under the events tab under the program tab.

PROGRAM: ECS: SOMA ACCESS POINT

Enrollment History Provide Services **Events** Assessments Notes Files Forms × Exit

Coordinated Entry Events

Problem Solving/Diversion/Rapid Resolution intervention or service ▼

Referral to Street Outreach project or services ▼

Referral to Housing Navigation project or services ▼

CE Events

- You will find the "Event" Items under the corresponding "Categories."
- Select the drop-down arrow next to the category in order to capture the CE Event.

PROGRAM: ECS: SOMA ACCESS POINT

Enrollment History Provide Services **Events** Assessments Notes Files Forms × Exit

Coordinated Entry Events

Categories

| | |
|--|---|
| Problem Solving/Diversion/Rapid Resolution intervention or service | ▼ |
| Referral to Street Outreach project or services | ▼ |
| Referral to Housing Navigation project or services | ▼ |

Event Items Are Located Under Each Drop Down Category

CE Events

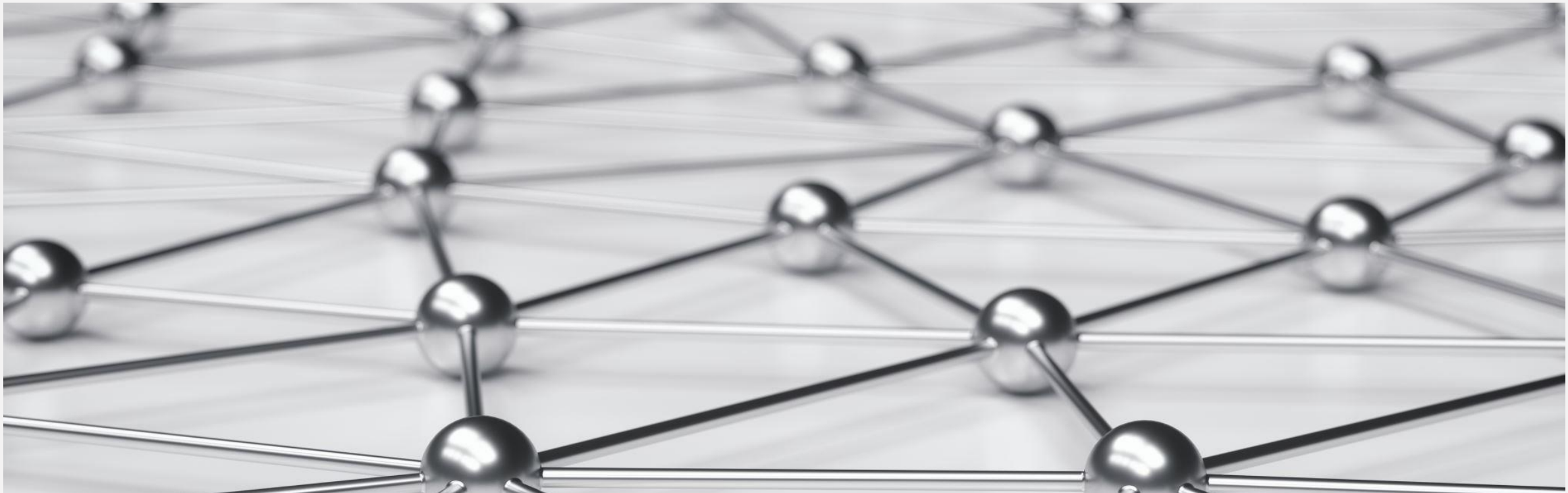
Here you will see when you select the category, the "Event" items will show in the drop-down.

Previously, items that were under the "Services" tab are now located under the "Event Category" to be captured at each Problem-Solving interaction.

Coordinated Entry Events

Problem Solving/Diversion/Rapid Resolution intervention or service

- Problem Solving: Initiated Problem Solving Conversation
- Problem Solving Mediation Services: Mediation
- Problem Solving Conversation: Problem Solving Conversation
- Problem Solving Housing Location Assistance: Problem Solving Housing Location Assistance



Problem Solving

Problem Solving

- Creative, strength-based conversations to explore and plan housing solutions outside of the Homelessness Response System
- Various categories of Problem-Solving services
 - Problem Solving Conversations
 - Housing Location Assistance
 - Travel and relocation support outside of San Francisco
 - Reunification, Mediation, and Conflict Resolution
 - Financial Assistance
- Problem Solving can be cyclical
 - A household may explore Problem Solving multiple times before finding a sustainable solution
 - If unsuccessful, the household is given the housing prioritization assessment (primary assessment)

For more information, see the directions on Problem Solving located in Box.

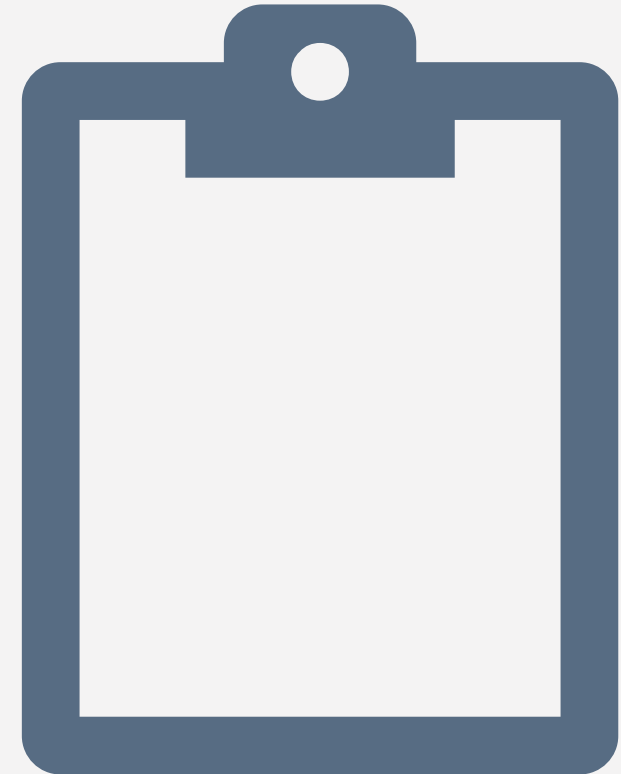




Housing Primary Assessment

Housing Primary Assessment

- Evaluates a household's possible health vulnerability, housing barriers, and homelessness chronicity
- Determines prioritization for housing resources: Housing Referral Status vs. Problem Solving status
- Completed for households that did not resolve their homelessness via Problem Solving
- Does **NOT** guarantee eligibility for a housing resource
- Is not visible to all users to protect household's privacy



Housing Primary Assessment

- **Prior to completing an assessment**, you should **check the household's history tab or profile screen** to see if **they have already completed an assessment**
- Assessment are valid for six months
 - **Do not** complete a new assessment (within the six months) unless there has been a change in population
 - If the household has been exited, you need to re-enroll them prior to completing the assessment

| Service Name | Start Date | End Date |
|--|------------|----------|
| ECS: Bayview Access Point [TRAINING] San Francisco Adult Coordinated Entry Agency | 08/27/2019 | Active |
| Referral: Community Queue [TRAINING] San Francisco Adult Coordinated Entry Agency referral to Community Queue | 08/07/2019 | Pending |
| Adult Primary CE Assessment [TRAINING] San Francisco Adult Coordinated Entry Agency | 08/07/2019 | |

Legend: Program Service Referral Reservation Assessment

UNIQUE IDENTIFIER
F32DE8A0A

COMMUNITY QUEUE
Client has an active entry on the Community Queue.

VIEW DETAILS


No Contact Information - Add



Completing the Assessment in ONE

PROFILE HISTORY SERVICES **PROGRAMS** NOTES FILES CONTACT LOCATION REFERRALS ASSESSMENTS

PROGRAM HISTORY

| Program Name | Start Date | End Date | Type |
|--|------------|----------|------------|
|  ECS: Bayview Access Point [TRAINING] San Francisco Adult Coordinated Entry Agency | 10/07/2019 | Active | Individual |
| Swords Rapid Resolution Program | | | |

PROGRAM: LYRIC ACCESS POINT

Enrollment History Provide Services **Assessments** Notes Files Forms × Exit

Assessments





LINK FROM ASSESSMENTS

Adult Primary CE Assessment → **START**

Assessment History

There are no results to display

Completing the Assessment in ONE

| ADULT PRIMARY CE ASSESSMENT | |
|-----------------------------|---|
| Assessment Date | 10/24/2019  |
| Assessment Location | ECS: Bayview Access Point  |
| Assessment Type | In person  |
| Assessment Level | Housing Needs Assessment  |

10/24/2019

| | |
|---|---|
| Select | Assessment type should always be in person |
| Phone | |
| Virtual | |
| <input checked="" type="checkbox"/> In person | |

| | |
|--|--|
| Select | Assessment level should be Housing Needs Assessment |
| Crisis Needs Assessment | |
| <input checked="" type="checkbox"/> Housing Needs Assessment | |

Completing the Assessment in ONE

ADULT PRIMARY CE ASSESSMENT

Assessment Date 08/28/2019

Complete the fields of the assessment being as thorough as possible (try to avoid using data not collected)

ADULT HOUSING ASSESSMENT

1) Where did you stay last night? (Living situation, not geography) Select

2) In the place you are staying, are you experiencing physical or sexual violence? Select

3) How long have you been homeless this time? Select

4) Have you resided in a shelter, safe haven, or place not meant for human habitation for more than 12 months over the last 3 years (Does not need to be consecutive)? Select

5) How long in total have you lived in an emergency shelter or place not meant for people to sleep, including today? (Over lifetime) Select

6) How many times in the past three years have you lived in a shelter, outdoors, in a vehicle, or other place not meant for people to live? (each break in homelessness has to span at least 7 consecutive nights) Select

7) How old were you when you first experienced homelessness (living in shelter, outdoors, in a vehicle or other place not mean for people to live)? Select

8) Do you have one of the following disabling conditions, or been told you have one of the following by a healthcare provider: Physical disability, developmental disability, chronic health condition, HIV/AIDS, mental health problem, substance abuse? Select

9) Do you have any challenges that cause you to need help with daily activities or help with maintaining housing (e.g. a serious medical condition, mental health problem, substance problem, other issue)? Select

10) How many times have you used crisis services in the past year (for example, mental health crisis services, hospital, detox, suicide prevention hotline)? Select

THE REMAINING FIELDS ARE USED FOR STATISTICAL PURPOSES (NO INPUT NECESSARY)

SAVE

CANCEL



Primary Assessment Facilitation Guide

Facilitation Guide



Housing Referral Status

- The score of the assessment will populate once it has been saved. The score is used to determine if a household has Housing Referral Status.
- Tell households in real time if they have Housing Referral Status
 - Do not tell the household the exact score of the assessment
 - For households who are not Housing Referral Status for housing, please revisit Problem Solving

Adult Priority Score Summary

| | | | |
|---|----|---------------------------|----|
| LIVING SITUATION AND HOUSING HISTORY | 51 | | |
| INCOME | 9 | HEALTH STATUS AND HISTORY | 30 |
| Adult Priority PRE-SCREEN TOTAL 90 | | | |

Permanent Supportive Housing Queue

CAAP PSH Queue

Rapid Rehousing Queue

Stabilization Rooms Queue (SFHOT Management Only)

REFER DIRECTLY TO COMMUNITY QUEUE(S)

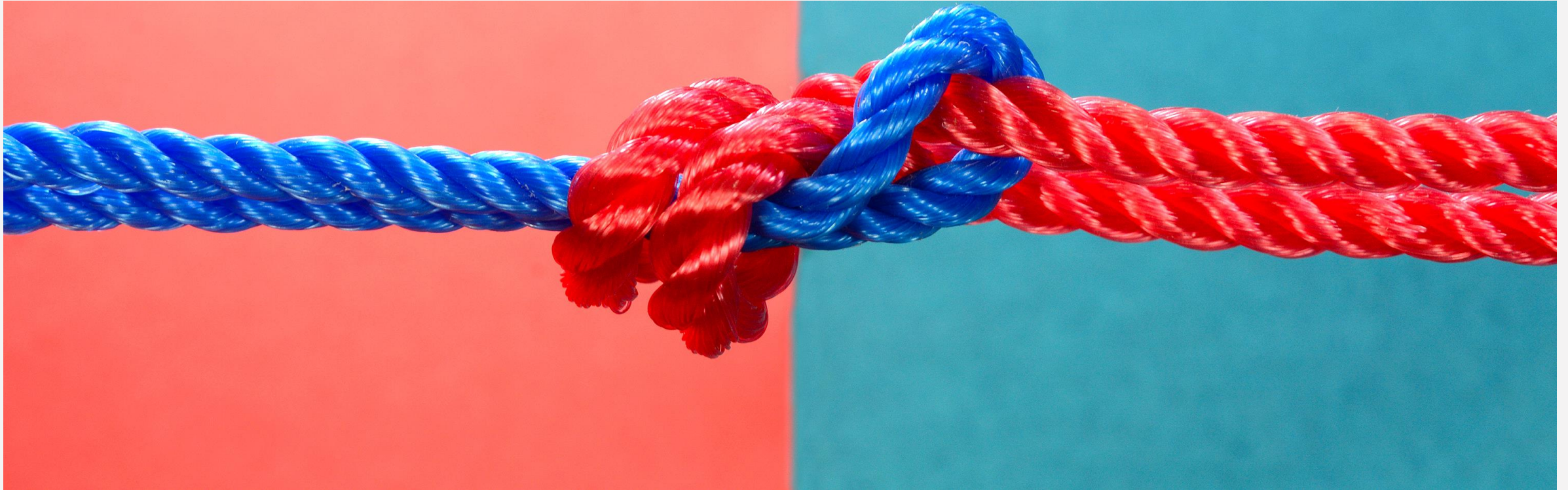
Housing Referral Status

For current Housing Referral Status criteria, please visit the Department of Homelessness and Supportive Housing – Coordinated Entry website:



Website: <https://hsh.sfgov.org/services/the-homelessness-response-system/coordinated-entry/>

*Note: This scores may change depending on housing availability in a 90-day period



Referrals and the Community Queue






Referrals to the CQ

- If the household has more than one assessment, the most recent assessment will default as the one on the CQ (*this is only true if the assessments are the same population*)
- If the assessments are different, the original assessment needs to be removed from the CQ and the new assessment will need to be referred

PROFILE **HISTORY** SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

HISTORY


Advanced Search Options [View](#) ▾

| Service Name | Start Date | End Date |
|---|--|--|
|  Referral: Community Queue Sara H. Agency 2 referral to Community Queue |  08/07/2019 | 09/04/2019  |
| Adult Primary CE Assessment [TRAINING] San Francisco Adult Coordinated Entry Agency | | 07/23/2019   |
| LYRIC Access Point | 04/01/2019 | 04/01/2019 |

REMOVE FROM QUEUE

Reason for Removal

- Select Reason --
- Self Resolved
- Refused All Housing
- Whereabouts Unknown
- Deceased
- Reassessed
- Automated Removal
- Other

Queue Removal Date: 09/04/2019 

SAVE CHANGES **CANCEL**

SAVE CHANGES **CANCEL**

NOTES

“Checking in” households

Checking in a household is one way to keep them **active** on the CQ

The screenshot shows a software interface for a user named 'Teddy Bear'. The top navigation bar includes 'PROFILE', 'HISTORY', 'SERVICES', 'PROGRAMS', 'NOTES', 'FILES', 'CONTACT', 'LOCATION', 'REFERRALS', and 'ASSESSMENTS'. The 'HISTORY' tab is active, displaying a table of services and a referral entry. A modal window titled 'REFERRAL: ASSIGN' is open, showing details for a referral to 'Bruce Spruce'.

| Service Name | Start Date |
|---|------------|
| Housing Stabilization [TRAINING] San Francisco Adult Coordinated Entry Agency | 10/08/2019 |
| ECS: Bayview Access Point [TRAINING] San Francisco Adult Coordinated Entry Agency | 10/07/2019 |
| Swords Rapid Resolution Program [TRAINING] Swords to Plowshares | 10/01/2019 |
| Referral: Community Queue [TRAINING] San Francisco Youth Coordinated Entry Agency referral to Community Queue | 09/12/2019 |
| LYRIC Access Point | 09/12/2019 |

| REFERRAL: ASSIGN | |
|-----------------------------|---|
| Client | Bruce Spruce |
| Referred to | Community Queue |
| Referring Agency | [TRAINING] San Francisco Youth Coordinated Entry Agency |
| Referred Date | 09/12/2019 2:10 PM |
| Days Pending | 26 day(s) |
| Qualified | Yes |
| Adult Priority score | 93 |
| Last Activity | 09/12/2019 |
| Referred by Staff | Sara Hoffman |

Remember...

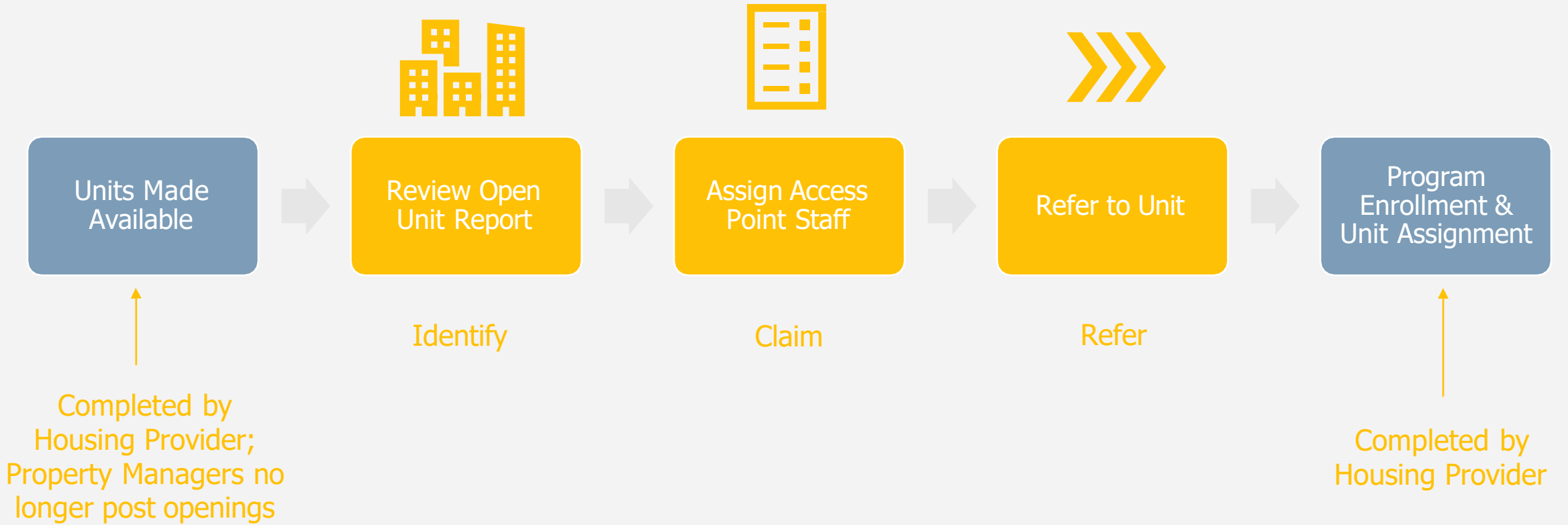
**You must complete the
Current Living Situation
Assessment at every direct
contact with a household**





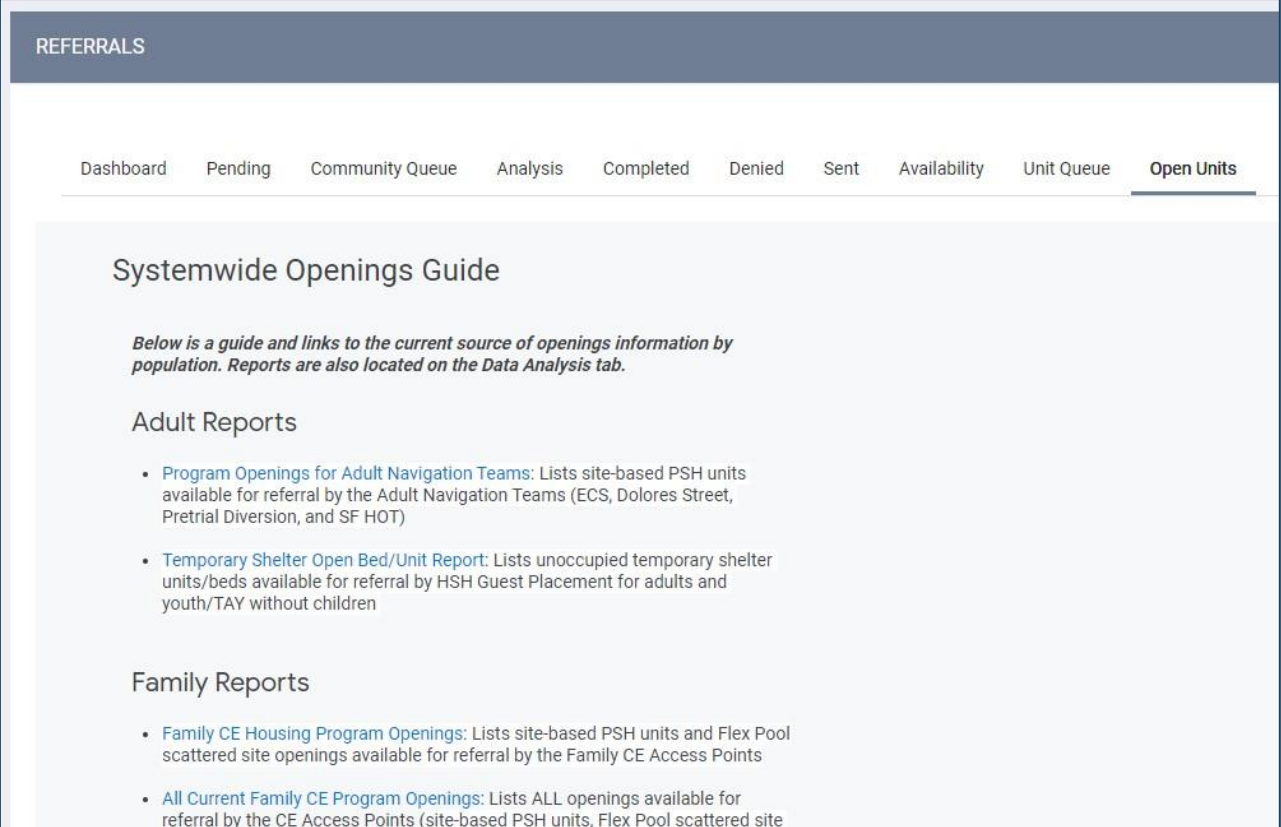
Unit Assignments Rapid Rehousing and Permanent Supportive Housing

Workflow



Location of Open Units Reports

- “Systemwide Openings Guide” located under the *Open Units Tab* under Referrals
 - **Links to both the Family and Youth Open PSH Units reports**
 - Reports for Flex Pool, RRH, and Shelter openings also listed/linked (*no change in workflow or use of Inventory units for these programs*)
- Reports are also located on the Data Analysis tab under “Family CES” and “Youth CES” headings



The screenshot displays the REFERRALS system interface. At the top, a dark blue header contains the word "REFERRALS". Below this is a navigation menu with tabs: Dashboard, Pending, Community Queue, Analysis, Completed, Denied, Sent, Availability, Unit Queue, and Open Units. The "Open Units" tab is currently selected and underlined. The main content area is titled "Systemwide Openings Guide" and contains the following text: "Below is a guide and links to the current source of openings information by population. Reports are also located on the Data Analysis tab." Below this text are three sections: "Adult Reports" with two bullet points, "Family Reports" with two bullet points, and "Youth Reports" (partially visible at the bottom). The bullet points describe various types of openings and their availability for referral.



Open PSH Units Reports

- Contains only site-based PSH units
- Review available units and attributes
- Can filter and sort to find units with specific attributes

| Family Open PSH Units (DRAFT) | | | | | | | | | |
|--|----------------------|--------------------------------|-----------|-------------------|----------------------------------|----------------------|-------------------|------------------|--|
| Agency Name | Building Name | Program Name | Unit Name | Link to Unit Page | Unit Population - Size - Funding | Current Availability | Availability Date | Client Full Name | |
| Abode Services | City Gardens | City Gardens - Prop C | 423 | 10188 ... | Family - 2BR - Prop C | Available | 2024-01-29 | Ø | |
| Abode Services | City Gardens | City Gardens - Prop C | 526 | 10200 ... | Family - 2BR - Prop C | Available | 2024-02-05 | Ø | |
| Abode Services | City Gardens | City Gardens - Prop C | 724 | 10221 ... | Family - 2BR - Prop C | Available | 2024-01-30 | Ø | |
| Bayview Hunters Point Foundation for Community Improvement | Bayview Hill Gardens | Bayview Hill Gardens - HUD PBV | 102 | 3745 ... | Family - 3BR-HUD PBV | Available | 1985-01-06 | Ø | |
| Bayview Hunters Point Foundation for Community Improvement | Bayview Hill Gardens | Bayview Hill Gardens - HUD PBV | 105 | 3729 ... | Family - 2BR-HUD PBV | Available | 1985-01-06 | Ø | |
| Bayview Hunters Point Foundation for | Bayview Hill Gardens | Bayview Hill Gardens - HUD PBV | 204 | 3775 ... | Family - 1BR-HUD PBV | Available | 2023-06-12 | Ø | |



Claiming Units

- Utilize Open Unit Reports to link directly to Unit Screen page
- Click on Link to Unit Page hyperlink
- In ONE system, must be switched into the agency where the unit lives

| | Agency Name ^ | Building Name ^ | Program Name ^ | Unit Name ^ | Link to Unit Page | Unit Population - Size - Funding |
|---|--|----------------------|--------------------------------|-------------|-------------------|----------------------------------|
| 1 | Abode Services | City Gardens | City Gardens - Prop C | 423 | 10188 | Family - 2BR - Prop C |
| 2 | Abode Services | City Gardens | City Gardens - Prop C | 526 | 10200 | Family - 2BR - Prop C |
| 3 | Abode Services | City Gardens | City Gardens - Prop C | 724 | 10221 | Family - 2BR - Prop C |
| 4 | Bayview Hunters Point Foundation for Community Improvement | Bayview Hill Gardens | Bayview Hill Gardens - HUD PBV | 102 | 3745 | Family - 3BR-HUD PBV |



Claiming Units

- Select appropriate "Referral Channel"
- Add Access Point to "Access Point Staff Responsible for Filling Unit"
- Add "Initial Date Unit Assigned to Access Point Staff to Fill"
- Include additional notes (if helpful)

FIELDS BELOW FOR USE BY FAMILY & YOUTH ACCESS POINTS OR HSH STAFF COORDINATING TRANSFERS INTO FAMILY & YOUTH UNITS

Referral Channel

Access Point Staff Responsible for Filling Unit

Initial Date Unit Assigned to Access Point Staff to Fill

Most Recent Date Unit Re-Assigned to Access Point Staff to Fill

Additional Notes

- ✓ Select
- Family CE
- Youth CE
- Transfer from within Site-Based PSH
- Transfer from Flexible Housing Subsidy Pool
- Transfer from RRH



If Unit is Reassigned to a Different Access Point to Fill

- Update "Access Point Staff Responsible"
- Leave "Initial Date"
- Add "Most Recent Date Unit Re-Assigned to Access Point Staff to Fill"
- Include any helpful notes

FIELDS BELOW FOR USE BY FAMILY & YOUTH ACCESS POINTS OR HSH STAFF COORDINATING TRANSFERS INTO FAMILY & YOUTH UNITS

Referral Channel

Access Point Staff Responsible for Filling Unit

Initial Date Unit Assigned to Access Point Staff to Fill

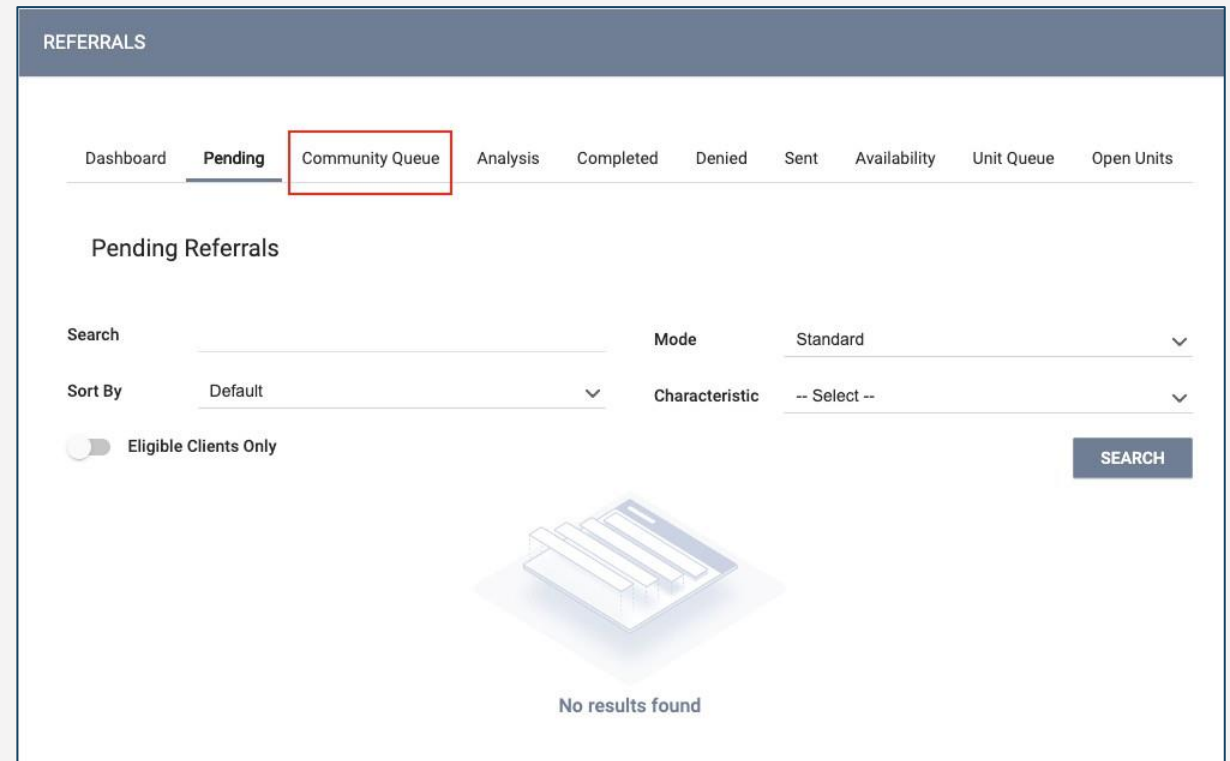
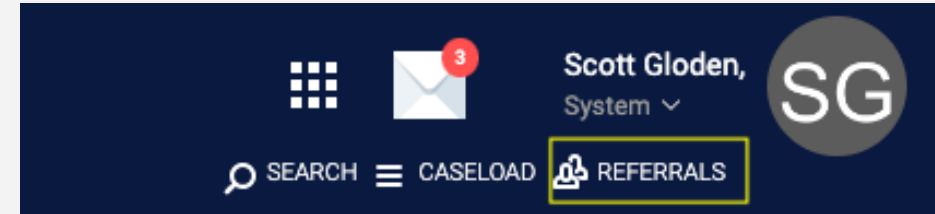
Most Recent Date Unit Re-Assigned to Access Point Staff to Fill

Additional Notes



Referrals

- Navigate back to the *Referrals* section
- Click *Community Queue*




Selecting Clients

Dashboard Pending **Community Queue** Analysis Completed Denied Sent Availability Unit Queue


Community Queue


< CAAP PSH Queue **Permanent Supportive Housing Queue** Rapid Rehousing Queue SFHA - EHV >


Eligible Clients Only


Date 01/26/2024 


Search


Active Agency TRAIN - Abode Services 

Project Verona - GF 

Filter Type Standard 

Mode Standard 

Characteristic -- Select -- 

Sort By Default 

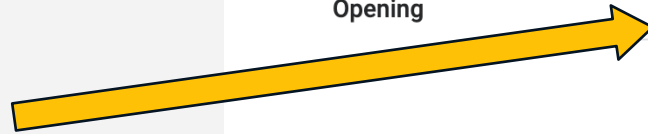
SEARCH

- Select the *Active Agency*
- Can turn on *Eligible Clients Only*
- Select the applicable program under *Project* dropdown






Reassigning a Client

Opening dropdown will show Available Units (versus Program Openings)



REASSIGN

| | |
|----------------------|---|
| Reassignment Date | 02/11/2024  |
| Program | Verona - GF  |
| Eligibility Override | <input type="checkbox"/> |
| Opening | Select...  |

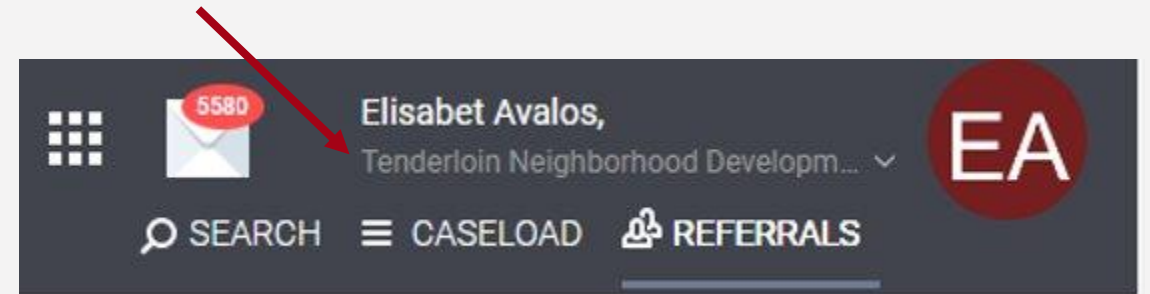
- Scroll to the *Reassign* section
- Select the applicable program
- Select the claimed unit under the *Opening* dropdown



Rapid Rehousing and Flex Pool Slots

Select the agency for which you will be filling the program opening

| | Agency | Buildings/Slot |
|------|--|---|
| Flex | Community Forward SF | Ending trans homelessness |
| | Unity Care | Flex Pool Slot(s) |
| RRH | 3rd st | 3rd St RRH |
| | Five Keys Charter Schools and Programs | Rising Up Five Keys |
| | First Place for Youth | Rising Up First Place for Youth |
| | Larkin Youth Services | Rising Up Larkin |
| | Larkin Youth Services | Pathways I- requires employment at beginning |
| | Larkin Youth Services | Pathways II- requires employment at beginning |



Rapid Rehousing and Flex Pool Slots

Select the **Availability** tab under **Referrals**.



Tenderloin Neighborhood Development Corporation

REFERRALS

Dashboard Pending Community Queue Analysis Completed Denied Sent **Availability** Open Units


Rapid Rehousing and Flex Pool Slots

Select the program opening you are filling and click on the pencil icon

864 Ellis Street - HUD PBV

FULL AVAILABILITY LIMITED AVAILABILITY NO AVAILABILITY ^

Available Openings

04/18/2022 Unit 2C - HOPWA (HIV+ Unit) | Assigned to: Larkin St 

Unit Number : 2C
Unit Size (# of bedrooms) : 0
Minimum Household Size (min. # of ppl) : 1
Maximum Household Size (max. # of ppl) : 2
What floor is the unit on? : 2
Does the building have an elevator? : Yes
ADA Unit : No
Does the building have stairs? : No
Does the building have a nurse? : No
Does the unit have a shower? : Yes
9 more fields

Rapid Rehousing and Flex Pool Slots

In the additional notes field add the name of your agency and your name

MODIFY OPENING ✕

| | |
|---------------------------|--|
| Date | 04/18/2022  |
| Additional Notes | <input type="text" value="Unit 2C - HOPWA (HIV+ Unit) Assigned to: Larkin St"/> |
| Unit Number | <input type="text" value="2C"/> |
| Unit Size (# of bedrooms) | <input type="text" value="0"/> |

Rapid Rehousing and Flex Pool Slots

How you know you did it right

San Francisco Youth Coordinated Entry Agency

REFERRALS

Dashboard Pending Community Queue Analysis Completed Denied Sent Availability Open Units

Open Unit Report Live 03.31.22 349 rows - from cache - 29m ago Run ⚙️

Filters (4) Agencies Agency Name is not "Fake Example Agency" or "Test" Agencies CoD Code is "CA-301" Program Openings Open Referrals is 0 Program Openings Opening Filled / Deleted (Yes / No) is 0

Visualization Table (Legacy) Forward Edit

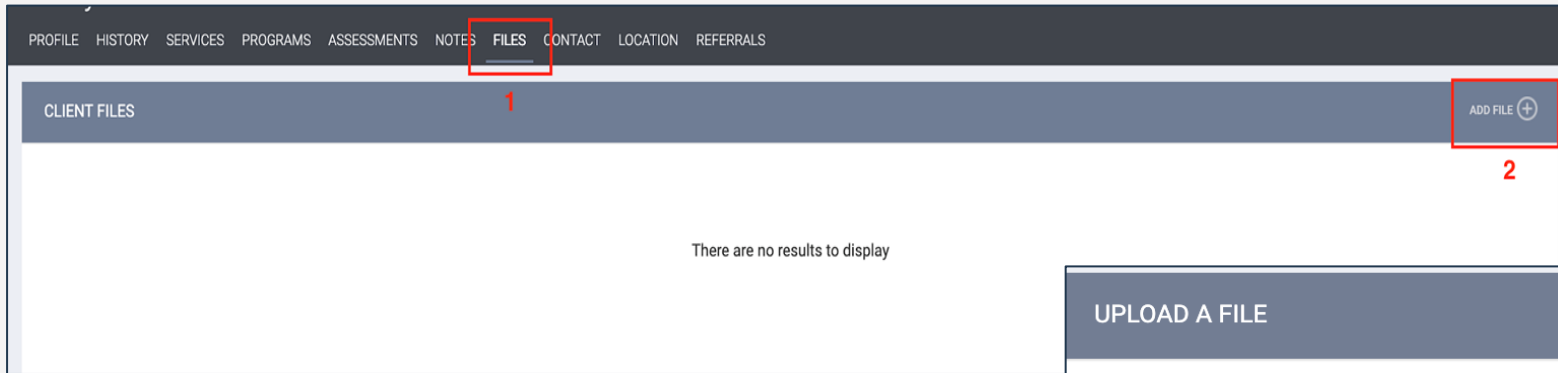
| | Program Opening Note | Access Point Staff Responsible for Filing Unit | Program Openings Custom HDA? (Yes / No) | Program Openings Custom H&E Referral (Yes / No) | Program Openings |
|----|--|--|---|---|------------------|
| 8 | Unit 2C - HCPWA (HIV+ Unit) Assigned to Lanin St | Lanin Street | No | No | No |
| 9 | Unit 5D | | No | No | No |
| 10 | | | No | No | No |
| 11 | | | No | No | No |
| 12 | | | No | No | No |





Uploading Documents

Uploading Documents into ONE



The 'UPLOAD A FILE' modal form contains the following fields and controls:

- Category:** A dropdown menu currently showing 'Background Check'.
- Predefined Name:** A dropdown menu currently showing 'Credit, Criminal, and/or Eviction-T'.
- File:** A 'Select File' button.
- Private:** A toggle switch currently turned off.

Annotations on the right side of the form:

- Red text: "Select a category and a predefined name from the drop downs."
- Red text: "Click Select file and then chose the file from your computer you need to upload."
- Red text: "Click Save"

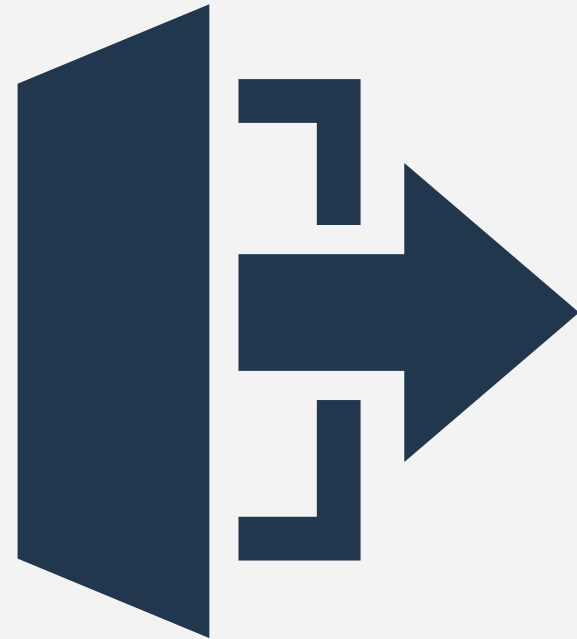
Buttons at the bottom: 'SAVE CHANGES' and 'CANCEL'.



Exiting Clients

Exits


- Access Point staff are responsible for exiting households from the CE program
- Household should be exited from CE for the following reasons:
 - Successfully problem solved
 - Been housed by CE
 - Known to be housed
 - Deceased
 - Household is lost to follow up (90 days)
 - No longer experiencing homelessness in San Francisco
 - Declined three housing offers
 - Staff entering third refusal should exit household



Exits

PROFILE HISTORY SERVICES **PROGRAMS** NOTES FILES CONTACT LOCATION REFERRALS ASSESSMENTS

PROGRAM HISTORY

| Program Name | Start Date | End Date | Type |
|--|------------|------------|------------|
| YHDP Larkin Street YAC Collaborative Housing Test Agency | 11/21/2018 | 12/21/2018 | Individual |
|  ECS: Bayview Access Point [TRAINING] San Francisco Adult Coordinated Entry Agency | 11/01/2018 | Active | Individual |

PROGRAM: ECS: BAYVIEW ACCESS POINT

Enrollment **History** Provide Services Assessments Notes Files Forms ✕ Exit

Program Service History

LINK FROM HISTORY

| Service Name | Start Date | End Date |
|--|------------|------------|
| Problem Solving :Initiated Problem Solving Conversation [TRAINING] San Francisco Adult Coordinated Entry Agency | 10/15/2019 | 10/15/2019 |


Reservation Service Referral


Exits


PROGRAM: ECS: BAYVIEW ACCESS POINT

Enrollment History Provide Services Assessments Notes Files Forms

End Program for client Will Wilson


Program Exit Date 

Adult CE Program Referred to? 


Destination 

Adult CE Program Exit Destination Note:


MONTHLY INCOME AND SOURCES

Income from Any Source 

NON-CASH BENEFITS

Receiving Non-Cash Benefits 

HEALTH INSURANCE

Covered by Health Insurance 

Removing Exits

- If a household has been auto-exited but re-engages prior to the 6-month expiration of their assessment, you will need to reactivate their program enrollment.
- This is done by selecting “Reopen Client” at the very bottom of the exit screen.

The screenshot displays a web application interface with a dark navigation bar at the top containing the following menu items: PROFILE, HISTORY, SERVICES, PROGRAMS, NOTES, FILES, CONTACT, LOCATION, REFERRALS, and ASSESSMENTS. The 'PROGRAMS' menu item is highlighted with a red box. Below the navigation bar is a section titled 'PROGRAM HISTORY'. A table lists programs, with the first entry 'ECS: Bayview Access Point' highlighted by a red box. To the right of this entry is a red box containing a trash can icon. A modal window is open over the 'ECS: Bayview Access Point' entry, titled 'PROGRAM: ECS: BAYVIEW ACCESS POINT'. This modal has a sub-navigation bar with 'Enrollment', 'History', 'Provide Services', 'Assessments', 'Notes', 'Files', and 'Forms'. The 'History' tab is selected. In the top right corner of the modal, there is a red box containing a button labeled '× Exit'. Below the sub-navigation bar is a section titled 'Program Service History' with a 'Service Name' field. At the bottom of the modal, there are two buttons: 'Reopen Client Program' and 'Audit Log' (which includes a calendar icon with the number 25).

Auto-Exits

Auto-exits from the CE may occur if:

- The household is permanently housed through CE.
- Any household enrolled in the CE program that had no activity in ONE for 90 days.
- Exit Destination will be marked as “Unknown”.

Auto-Exits from CE when Housed

The following events will trigger an auto-exit from CE Program:

- A staff member saves a value for the field Housing Move-In Date in an enrollment screen for any program enrollment with a permanent housing program type.
- A staff member saves a “housed” exit destination for any program exit screen.

Example 1

The household is referred to a PSH program. The household is enrolled in the program with a move-in date of 7/30/21.

Auto-Exit from CE= YES

Example 2

The household informs their case manager they are going to live with their aunt in Oregon.

Auto-Exit from CE=NO

The household needs to be manually exited from CE.

Timelines/Thresholds in ONE

| Functionality Name | Timeframes | What functionality does | What will keep the client active? |
|--|------------|--|--|
| Auto Exits | 90 Days | Clients will be automatically exited from a Coordinated Entry program enrollment after days of inactivity | Services and program level assessments |
| Inactive Referral Expiration Threshold | 90 Days | Clients will be removed from the community queue after 90 days of inactivity | Referral activity, assessments, notes, "check-in", uploaded files location added |
| Community Referral Threshold | 180 Days | If a client has been referred to a housing program and the referral sits pending for more than 180 days, the client will be sent back to the community queue | The provider needs to change the status of the referral from pending to pending in process |
| Assessment Expiration | 6 Months | Length of time for validity of assessments | |
| Unreachable Clients | 90 Days | If a client has been unreachable for 90 days, they should be removed from the community queue and exited from the Coordinated Entry program | |

Community Que Reinstatement Policy

ONE System Auto-exit Thresholds were established to better manage the list of Housing Referral Status households placed on the Community Queue. Housing Referral Status households are expected to engage in the housing navigation process towards housing placement into a permanent housing program. HSH and HSH providers are expected to support Housing Referral Status households throughout the navigation process and maintain participant engagement. See Engagement activities that prevent auto-exits from the Community Queue. Note, the threshold “clock” is reset when a referral returns to the Community Queue with any qualifying actions.

Per the CE Written Standards, “If a Housing Referral Status person experiences a 90-day period of no contact with CE, they will be (auto) exited from CE, exited from Housing Referral Status and will need to start again with Problem Solving to re-engage.”

This notice provides guidance for reinstating households who have auto-exited CE back to the Community Queue without starting again with Problem Solving or retaking the Housing Primary Assessment.

Criteria for Reassessment

Per the CE Written Standards, San Francisco Coordinated Entry Assessments are active for six (6) months from date of assessment for Adults and Youth; ninety (90) days for Families with Minor Children. People experiencing homelessness are not expected to conduct a new assessment simply due to a new symptom or a change in their household status. In the event a household experiences a change in household type (e.g., the addition of a new child, or departure of an adult) that household may be immediately reassessed. Problem Solving status households who believe their status does not reflect their current needs can pursue an Administrative Review.



Resources

ONESF Help Center Website

<https://onesf.bitfocus.com/coordinated-entry>

Bitfocus Helpdesk

onesf@bitfocus.com

415.429.4211

