



Monthly Agency Leads Meeting

San Francisco, April 2023



TODAY'S AGENDA

Welcome!

2023 HIC/PIT Updates

ONE System Auto-exit Thresholds

Reports Spotlight

System Updates

Upcoming Trainings

WELCOME!

Icebreaker!

What is your favorite movie or gameday snack?

Please share name, pronouns, and agency when responding.



2023 HIC/PIT Updates

2023 HIC/PIT Updates

- This year's **Housing Inventory Count (HIC) and Point-in-Time (PIT) Count** occurred on January 26, 2023
- Final stretch of data cleanup for shelter and housing program **rosters and inventory**
- Final submission deadline: **April 28, 2023**



ONE System Auto-exit Thresholds

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.
- **Auto-exit thresholds set program by program, and only apply to certain program types, i.e. Coordinated Entry programs and family shelters.**

Qualifying Actions

- **Actions to prevent auto-exit from a Program Enrollment*:**
 - Adding a program level Service
 - Adding an Event
 - Adding a program level Assessment
 - Adding a Status Assessment
 - Adding an Annual Assessment
 - Adding a Current Living Situation Assessment
 - Adding a Unit/Bed to the program enrollment

**Programs with no set auto-exit threshold will never experience auto-exits*

Qualifying Actions (cont.)

- **Actions to prevent auto-exit from a Community Queue:**
 - Adding a Service (client level and program level)
 - Adding an Event
 - Adding an Assessment (client level and program level)
 - Adding a Status Assessment or Annual Assessment for a client
 - Adding a new contact to the Contact tab
 - Adding a location to the Location tab
 - Adding a File (client level and program level)
 - Adding a note (client level and program level)
 - Adding an alert
 - Enrolling a client into a program
 - Exiting a client from a program
 - 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.

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	<div><p>✓ Pending</p><p>Pending - In Process</p><p>Denied</p><p>Expired</p></div>
Private	

SAVE CHANGES CANCEL

Additional Resource

- **Document:** [ONE System Coordinated Entry & Community Queue Auto-Exit Threshold Settings](#)



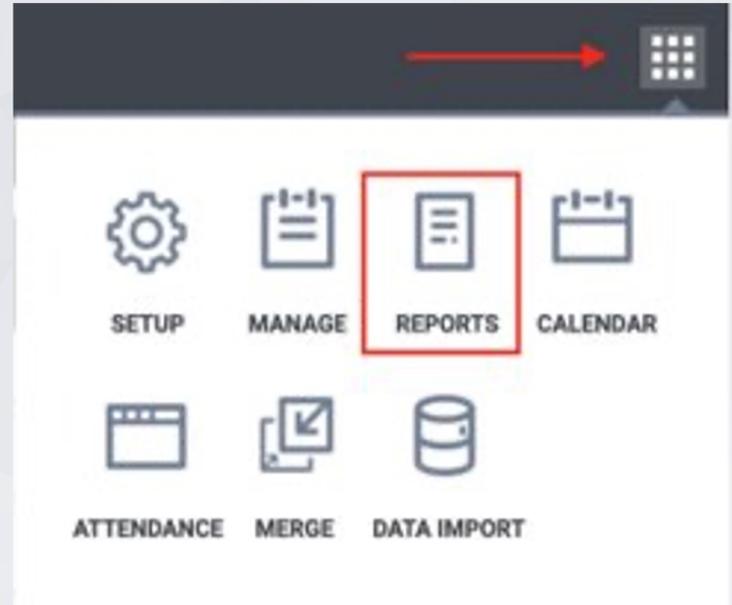
Reports Spotlight

Today's Highlighted Report

- [\[EXIT-101\] Potential Exits](#)

Additional Helpful Reports for HIC/PIT Data

- [\[GNRL-106\] Program Roster](#)
- [\[HUDX-225\] HMIS Data Quality](#)
- [\[GNRL-220\] Program Details Report](#)



[EXIT-101] Potential Exits

- Program-based report
- Lists clients who are active in the program but have not received services, case notes or program connected assessments since the selected cutoff date.
- Helpful to understand which clients may be in danger of auto-exiting from a program.
- Captures activity activity connected to a particular enrollment, regardless of which agency added the activity.

Potential Exits			
Clients who are			
Unique ID	[TRAINING] San Francisco Adult Coordinated Entry Agency (ACE)		
95B71C2BA	Cut off Date: 04/21/2023		
E3CC96B05	the cut off date		
B833B21EA	Most Recent Update/Service/Case Note	Most Recent Update/Service/CaseNoteDate	Assigned Staff
51EE5F8C5			Enroll Type
point			Individual
point	[PATH] Community mental health: Community mental health	03/11/2023	Individual
point			Individual
point			Individual
Total Unique Clients: 4			
Total Number Of Clients Programs: 4			

System Updates

- ULI (Unit Level Inventory) Phase 3 Go Live is set for June 12, 2023
 - Trainings are upcoming
 - Last day to update the OVT is **June 6**
- New Transfer Queue is live
 - Will be used by HSH to manage client transfer requests
 - To be used by HSH only

Transfer Queue (HSH Only)



Upcoming Trainings

Trainings

- June 7 @ 11am-12:30pm:
Phase 3 Inventory Provider
Training – 1
- June 12 @ 1-2:30pm:
Phase 3 Inventory
Provider Training - 2



Announcements

Monthly Office Hours:

- April 25 @ 2pm
- May 23 @ 2pm

Next Agency Leads Meetings:

- May 22 @ 10:30am
- June 26 @ 10:30am

Presenters are welcome!

Registration Links: onesf.bitfocus.com



Helpful Resources

ONESF Help Center Website

<https://onesf.bitfocus.com>

Bitfocus Helpdesk

onesf@bitfocus.com

415.429.4211

Thank You From Your SF Team!



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