



Coordinated Entry Navigation Services

Navigation

- Housing Referral Status households will be assigned a navigator who will:
 - Assist household in getting “document ready”
 - Help the household navigate the housing application process
- The Navigators should assign themselves as the navigator in the ONE System



Assigning Navigators in ONE

There are two ways you can assign a navigator in ONE

Method 1:

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

HISTORY 1

Advanced Search Options View ▾

Service Name	
ECS: Bayview Access Point [TRAINING] San Francisco Adult Coordinated Entry Agency	1
Swords Rapid Resolution Program [TRAINING] Swords to Plowshares	1
Referral: Community Queue [TRAINING] San Francisco Youth Coordinated Entry Agency referral to Community Queue	0

2

REFERRAL: ASSIGN

Client	Marge Simpson
Referred to	Community
Referring Agency	[TRAINING]
Referred Date	09/17/2019
Days Pending	19 day(s)
Qualified	Yes
Adult Priority score	123
Last Activity	09/17/2019 CHECK-IN
Referred by Staff	YCE Train6
Navigator	ASSIGN NAVIGATOR 3

Navigator

Private

- ✓ Aaron Court
- Billie McGee
- HOT Train1
- Hot Train2
- Hot Train4
- HOT Train5



Assigning Navigators in ONE

Method 2: is better when you are making a referral at the same time

1

Sara Hoffman,
Sarah Smith Housing Services

SEARCH CASELOAD **REFERRALS**

1 Last 30 days

REFERRALS

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

Community Queue

2

Search Mode Standard

Active Agency Sarah Smith Housing Services Characteristic -- Select --

Eligible Clients Only Sort By Default

SEARCH

3

Client	Referral Date	Days Pending
<input checked="" type="checkbox"/> Lime Ade Referred by: [TRAINING] Bayview Access Point	01/28/2018	576

REFERRAL: ASSIGN

Client Lime Ade

Previous Referred Program Nob Hill

Previous Referred to Agency Sara H. Agency 2

Referring Agency [TRAINING] Bayview Access Point

Referred Date 01/28/2018 11:34 PM

Days Pending 576 day(s)

Qualified Reassigned

Fam Priority score 30

Last Activity 12/19/2018 CHECK-IN

Referred by Staff Sara Hoffman

Navigator **ASSIGN NAVIGATOR** 4

Private

5

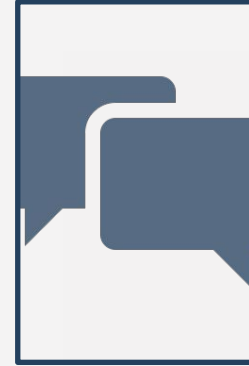
SAVE CHANGES CANCEL



Navigation Services



Navigation services track interactions related to the housing process



Allow other staff to be informed of the household's progress in the housing process



Navigators assist the household in getting their documents ready for housing



Copies of documents should be uploaded into ONE



Navigation Services

Enrollment	History	Provide Services	Events	Assessments	Notes	Files	✕ Exit
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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	▼
--	---



“Checking in” households



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

ready Bear


PROFILE HISTORY SERVICES PROGRAMS NOTES FILES CONTACT LOCATION REFERRALS ASSESSMENTS

HISTORY

Advanced Search Options View ▾

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

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 new
Current Living Situation
Assessment at every direct
contact with a household**



Release of Information

NOTE:

The ONE will prompt you to have the household sign a new Release of Information if the current ROI is set to expire

Don't forget to upload a copy of the ROI form signed by the client to the system.

Charlee Test

PROFILE HISTORY SERVICES PROGRAMS NOTES ASSESSMENTS FILES CONTACT

⚠ Release Of Information will expire in 1 days. Please review to ensure compliance.

CLIENT PROFILE

Social Security Number	XXX - XX - 9631
Quality of SSN	Full SSN Reported
Last Name	Test
First Name	Charlee
Quality of Name	Full name
Quality of DOB	Full DOB
Date of Birth	01/01/19
Middle Name	
Alias	
What is the client's	Female

RELEASE OF INFORMATION

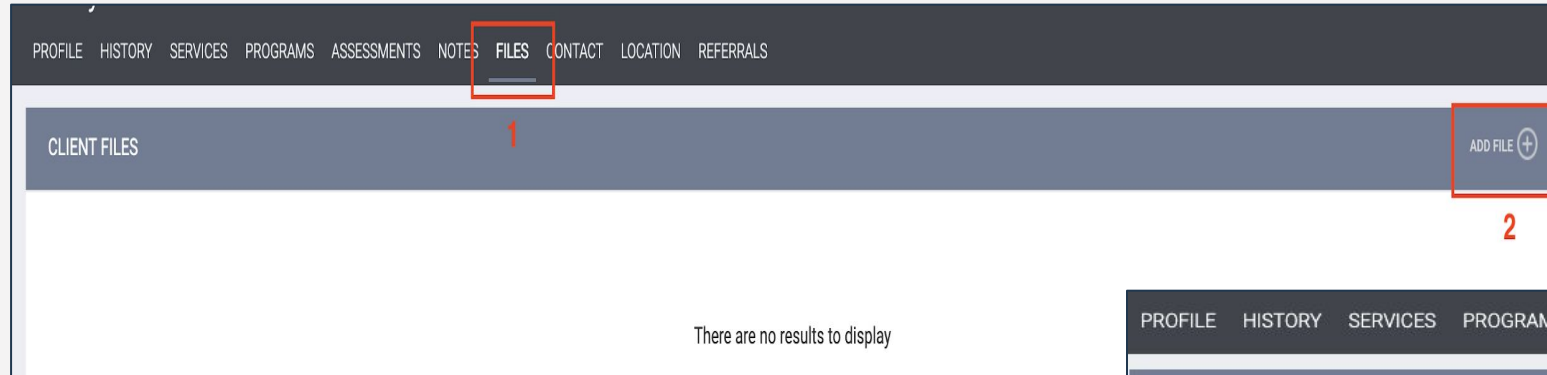
Permission	Yes
Start Date	09/05/2019
End Date	09/05/2029
Documentation	<div>✓ Select Electronic Signature</div>

By completing this form, you are certifying:
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

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

UPLOAD A FILE

Category Release of Information

Predefined Name Release of Information: Homeless R

File [Select File](#)

Trouble attaching files? Switch to the Basic Uploader

Private ☐

[SAVE CHANGES](#) [CANCEL](#)

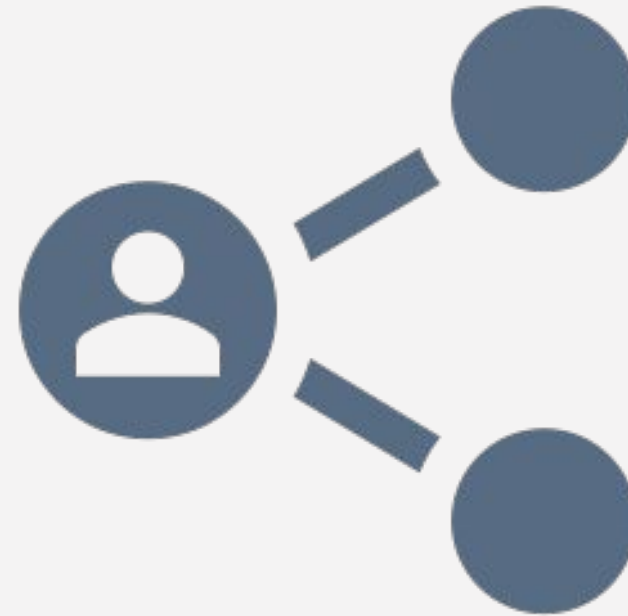




Matchmaking

Matchmaking

- Matchmaking is identifying and referring households to available housing
- How does it work?
 - Program eligibility is configured for every housing program participating in CE
 - Responses from the assessment and profile screen cross references with a program's eligibility criteria
 - The Eligibility Engine will generate a list of households who meet the program eligibility



Open Unit Report

Units that have been open the longest should be filled first

SEARCHCASELOADREFERRALS

REFERRALS

DashboardPendingCommunity QueueAnalysisCompletedDeniedSentAvailabilityOpen Units

Program Openings: 1,461/2

FILTERS (4)Agencies Agency Name is not "Fake Example Agency" or "Test"Agencies CoC Code is "CA-501"Program Openings Open Referrals is 0Program Openings Opening Filled / Deleted (Yes / No) is No

VISUALIZATION

Agency name	Program Name	Opening ID	Program Opening Date	Program Description	Program Type	Program Opening Note	Eligibility	Access Point Staff Responsible for Filling Unit	Unit Details	Population
46Tenderloin Housing Clinic	Seneca Hotel	2096	2019-08-13	"SRO. Each unit includes a mattress, bedframe, dresser, sink, and mirror. Entry = street level. Elevator to units. Units begin one floor up. TV and community room, community kitchen, and onsite laundry. Animals are only permitted if they provide a medically required service or companionship. Daytime Visiting: Visitation hours are from 9 a.m. until 10 p.m. There is a limit of two (2) visitors per unit at any time. Kids ages 13 & under do not count toward the visitor limit. There is a limit of two (2) kids per unit at any time. Tenant must be present at the time a visitor signs in, and must escort and sign out all visitors of the building by 10 p.m. unless the visitor is an overnight guest. Overnight Visiting: Those new to THC can only have an overnight visitor after 32 days of residency. Overnight visitor requests must be made by 9 p.m. for a visit that night. An overnight visitor has to check out by 11 a.m. the next morning and be escorted out by the tenant. A tenant gets a maximum of 10 overnights per calendar month, 20 for double occupancy units (one visitor per tenant and per unit, per night)."	PH - Permanent Supportive Housing (disability required)	Posted by Sergio Canjura - Unit # 632			Unit Number 632; Has Elevator; Has Stairs; Adult;	Single Adult
47Tenderloin Housing Clinic	Vincent Hotel	1935	2019-08-13	"SRO. Each unit includes a mattress, bedframe, dresser, sink, and mirror. Elevator to mezzanine floor ONLY. Entry = street level. Elevator to units on mezzanine floor only (1/2 floor up). TV and community room, and onsite laundry. Animals are only permitted if they provide a medically required service or companionship. Daytime Visiting: Visitation hours are from 9 a.m. until 10 p.m. There is a limit of two (2) visitors per unit at any time. Kids ages 13 & under do not count toward the visitor limit. There is a limit of two (2) kids per unit at any time. Tenant must be present at the time a visitor signs in, and must escort and sign out all visitors of the building by 10 p.m. unless the visitor is an overnight guest. Overnight Visiting: Those new to THC can only have an overnight visitor after 32 days of residency. Overnight visitor requests must be made by 9 p.m. for a visit that night. An overnight visitor has to check out by 11 a.m. the next morning and be escorted out by the tenant. A tenant gets a maximum of 10 overnights per calendar month, 20 for double occupancy units (one visitor per tenant and per unit, per night)."	PH - Permanent Supportive Housing (disability required)	Posted by Sergio Canjura - Unit # 333			Unit Number 333; Has Elevator; Has Stairs; Adult;	Single Adult
48Tenderloin Housing Clinic	Vincent Hotel	2097	2019-08-13	"SRO. Each unit includes a mattress, bedframe, dresser, sink, and mirror. Elevator to mezzanine floor ONLY. Entry = street level. Elevator to units on mezzanine floor only (1/2 floor up). TV and community room, and onsite laundry. Animals are only permitted if they provide a medically required service or companionship. Daytime Visiting: Visitation hours are from 9 a.m. until 10 p.m. There is a limit of two (2) visitors per unit at any time. Kids ages 13 & under do not count toward the visitor limit. There is a limit of two (2) kids per unit at any time. Tenant must be present at the time a visitor signs in, and must escort and sign out all visitors of the building by 10 p.m. unless the visitor is an overnight guest. Overnight Visiting: Those new to THC can only have an overnight visitor after 32 days of residency. Overnight visitor requests must be made by 9 p.m. for a visit that night. An overnight visitor has to check out by 11 a.m. the next morning and be escorted out by the tenant. A tenant gets a maximum of 10 overnights per calendar month, 20 for double occupancy units (one visitor per tenant and per unit, per night)."	PH - Permanent Supportive Housing (disability required)	Posted by Sergio Canjura - Unit # 316			Unit Number 316; Has Elevator; Has Stairs;	Youth

DATA

Powered by Looker



Matchmaking

Three filters can be used when matchmaking to narrow eligibility criteria

- Search by agency and program eligibility
- Search by assessment type
- Search by predetermined characteristics



Matchmaking

REFERRALS

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

Community Queue 1

Search 2

Active Agency 4

Project 4

Eligible Clients Only 3

Mode 5

Characteristic

Score Range

Sort By

SF Adult Prioritization Assessment

-- Select --

-- All Ranges --

Default

6 SEARCH

Client	Referral Date	Days Pending	Score
Will Wilson Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency	12/13/2018	305	75
Pcea0-Ch1-Dis-Mh-Hiv-Sa Adulteligibility1 Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency	02/20/2019	236	72
Pcea0-Ch1-Dis-G2-Dis-Hiv Adulteligibility1 Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency	02/21/2019	236	72
Ann Test1 Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency	02/07/2019	250	69



Making the Referral in ONE

- Households are sorted by highest vulnerability score and days pending on the CQ

Community Queue

Search

Active Agency

Project

☒ Eligible Clients Only

Housing Test Agency

Evergreen PSH

Mode

Characteristic

Score Range

Sort By






SF Adult Prioritization Assessment

-- Select --

-- All Ranges --

Default

SEARCH

Client	Referral Date	Days Pending	Score
 Will Wilson Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency	 12/13/2018	305	75 
Pcea0-Ch1-Dis-Mh-Hiv-Sa Adulteligibility1 Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency	 02/20/2019	236	72 



Making the Referral in ONE

- Select the correct program and unit number

RE-ASSIGN

Program

Evergreen PSH

1

Opening

04/27/2019 Training Day Open Un

2

SAVE CHANGES

CANCEL

REMOVE FROM QUEUE



Tracked Characteristics

- Certain units buildings/programs in the system have additional eligibility criteria that only pertains to a portion of the units in the building
- You will need to add additional filters to the search criteria when matchmaking for these units (called tracked characteristics)
- Providers will indicate in the unit posting when additional eligibility criteria is required for a unit



Example of an Open Unit Needing Tracked Characteristic

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

rogram Opening V2 Run

FILTERS (3) Agencies Agency Name is "Sara's Test Agency" or "Housing Test Agency" or "Sarah Smith Housing Services" or "Sara H. Agency 2" Program Openings Open Referrals is 0 Program Openings Opening Filled / Deleted (Yes / No) is No

VISUALIZATION

	Agency Name ^	Name	ID	Date Date	Description	Project Type Code	Note	Eligibility	Unit Details (Calculation)	Population (toggles)
1	Housing Test Agency	Evergreen PSH	237	2019-02-06		PH - Permanent Supportive Housing (disability required)	Tina Test Opening #1			
2	Housing Test Agency	Evergreen PSH	242	2019-04-17		PH - Permanent Supportive Housing (disability required)	Unit 1A This unit is dedicated for individuals with a mental health disability. Please only refer individuals who meet that criteria.		Unit Number 1A; 1; Max 2 people; Floor Number 1; Has Elevator; Adult;	Single Adult
3	Housing Test Agency	Evergreen PSH	389	2019-10-15		PH - Permanent Supportive Housing (disability required)			Unit Number 4A; Studio; Max 2 people; Floor Number 3; Has Elevator; Adult;	Single Adult
4	Housing Test Agency	Evergreen PSH	390	2019-10-15		PH - Permanent Supportive Housing (disability required)	4B		Unit Number 4B; Studio; Max 2 people; Floor Number 3; Has Elevator; Adult;	Single Adult
5	Housing Test Agency	Evergreen PSH	391	2019-10-15		PH - Permanent Supportive Housing	4A		Unit Number 4A; Studio; Max 2 people; Floor Number 3; Has Elevator; Adult;	Single Adult



Tracked Characteristics

Example: The Evergreen PSH Apartments has 24 units. 20 units require an adult who is experiencing homelessness and has an income less than 30% of the AMI. The remaining 4 units require the same eligibility but are dedicated to individuals with a mental health disability. The program eligibility was configured in ONE including the homelessness and income requirements.

When searching for one of the 4 units that are dedicated to individuals with a mental health disability, we will need to include an additional filter.



Community Queue

Search

Active Agency: Housing Test Agency

Project: Evergreen PSH

☒ Eligible Clients Only

Mode: **Characteristic**

Score Range

Sort By

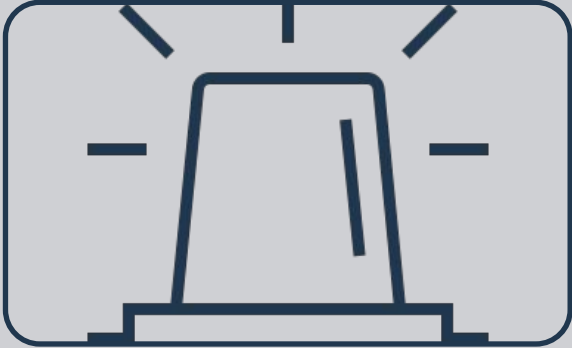
SF Adult Prioritization Assessment

- Select --
- Address
- CAAP Eligibility
- Chron A
- Disability
- HDAP
- HIV/AIDS
- HSP Eligibility
- Mental Health or Substance Use
- MHSA- FSP
- Nursing Support
- Priority List
- Referred for Clinical Review
- Training- Mental Health
- Trans Youth
- Vets**

Client	Referral Date
Will Wilson Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency	12/13/2018
Pcea0-Ch1-Dis-Mh-Hiv-Sa Adulteligibility1 Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency	02/20/2019
Pcea0-Ch1-Dis-G2-Dis-Hiv Adulteligibility1	



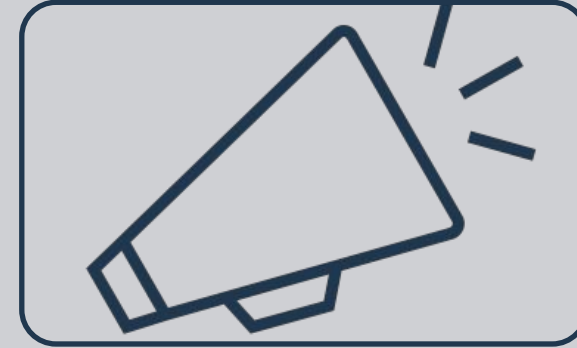
Things to Know About Referrals



Providers will receive notification when a referral is sent to their program



The provider is expected to change the status of the referral from pending to pending in-process as soon as they receive it



The Access Point staff who sent the referral will receive a notification that the referral status has been updated





Exits

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

EnrollmentHistoryProvide ServicesAssessmentsNotesFilesForms

End Program for client Will Wilson

Program Exit Date

__/__/__

 25

Adult CE Program Referred to?

A Program in the ONE System

▼

Destination

Data not collected

▼

Adult CE Program Exit Destination Note:

MONTHLY INCOME AND SOURCES

Income from Any Source

Data not collected

▼

NON-CASH BENEFITS

Receiving Non-Cash Benefits

Data not collected

▼

HEALTH INSURANCE

Covered by Health Insurance

Data not collected

▼

SAVE CHANGES

CANCEL



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 the Bitfocus software interface. At the top, a dark navigation bar contains the following tabs: PROFILE, HISTORY, SERVICES, **PROGRAMS** (highlighted with a red box), NOTES, FILES, CONTACT, LOCATION, REFERRALS, and ASSESSMENTS. Below this, the 'PROGRAM HISTORY' section is visible. A table lists programs, with the first entry 'ECS: Bayview Access Point' (with a red box around its edit icon) and the second entry 'Swords Rapid Resolution Program'. A modal window titled 'PROGRAM: ECS: BAYVIEW ACCESS POINT' is open, showing tabs for Enrollment, **History** (selected), Provide Services, Assessments, Notes, Files, and Forms. In the top right of this modal, there is a button labeled '× Exit' (highlighted with a red box). At the bottom of the modal, there is a button labeled 'Reopen Client Program' and an 'Audit Log' button with a calendar icon.



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	



Resources

ONESF Help Center Website

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

Bitfocus Helpdesk

onesf@bitfocus.com

415.429.4211

