



# Coordinated Entry Navigation Services

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# 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

Swords Rapid Resolution Program  
[TRAINING] Swords to Plowshares

**2**  **Referral: Community Queue**  
[TRAINING] San Francisco Youth Coordinated Entry Agency referral to Community Queue

REFERRAL: ASSIGN

Client Marge Simpson

Referred to Community Queue

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 **3**

Navigator **ASSIGN NAVIGATOR**

**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

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 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

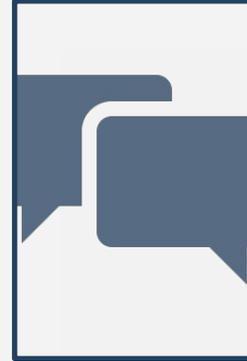
**SAVE CHANGES** 5 CANCEL



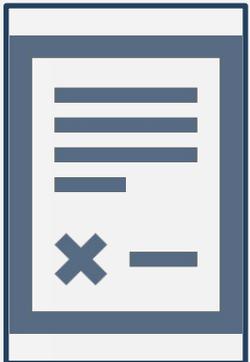
# Navigation Services



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

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Problem Solving/Diversion/Rapid Resolution intervention or service ▼

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Referral to Street Outreach project or services ▼

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Referral to Housing Navigation project or services ▼



# “Checking in” households

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

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 <b>CHECK-IN</b>
Referred by Staff	Sara Hoffman

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Remember...

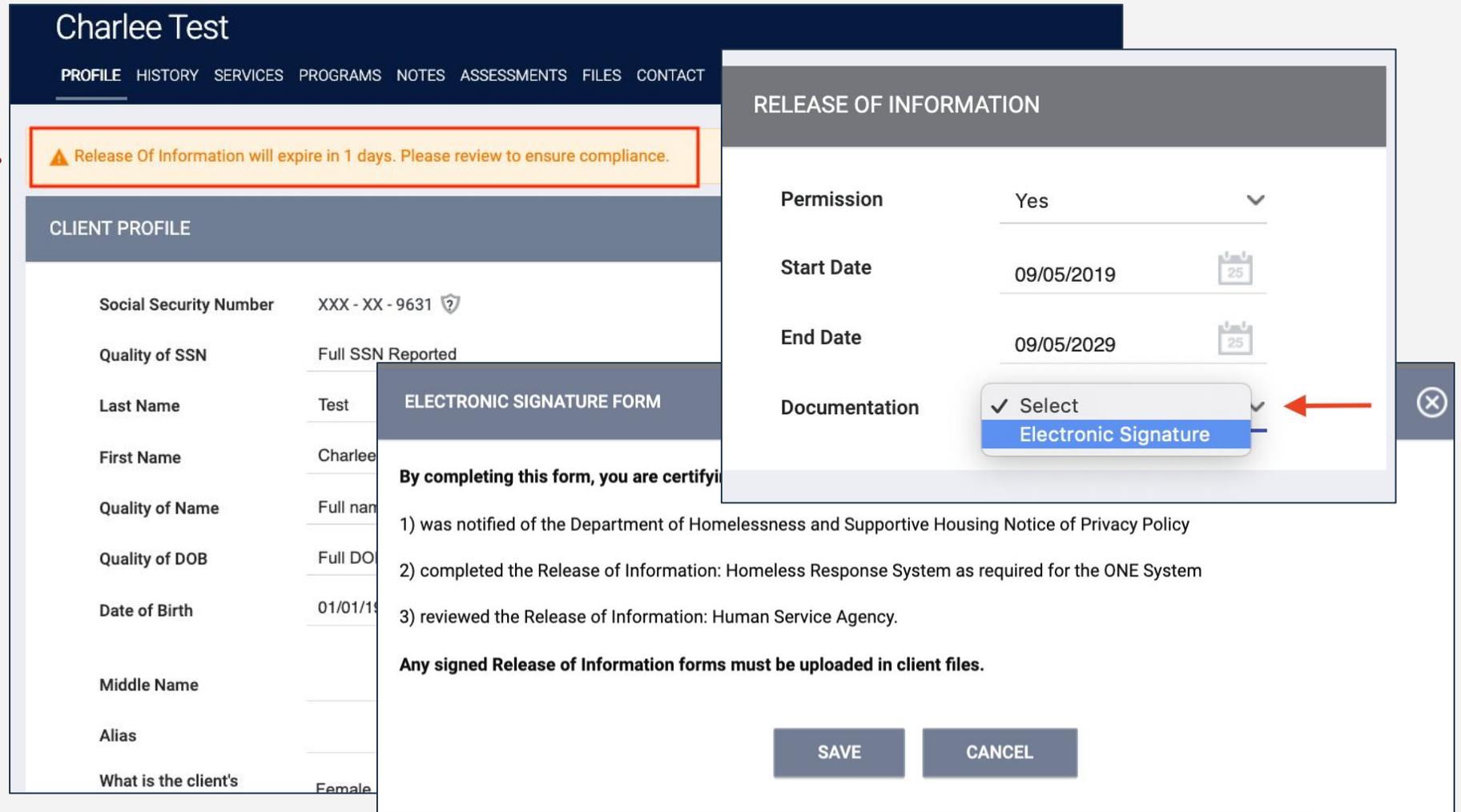
**You must complete the new  
Current Living Situation  
Assessment at every direct  
contact with a household**



# Release of Information

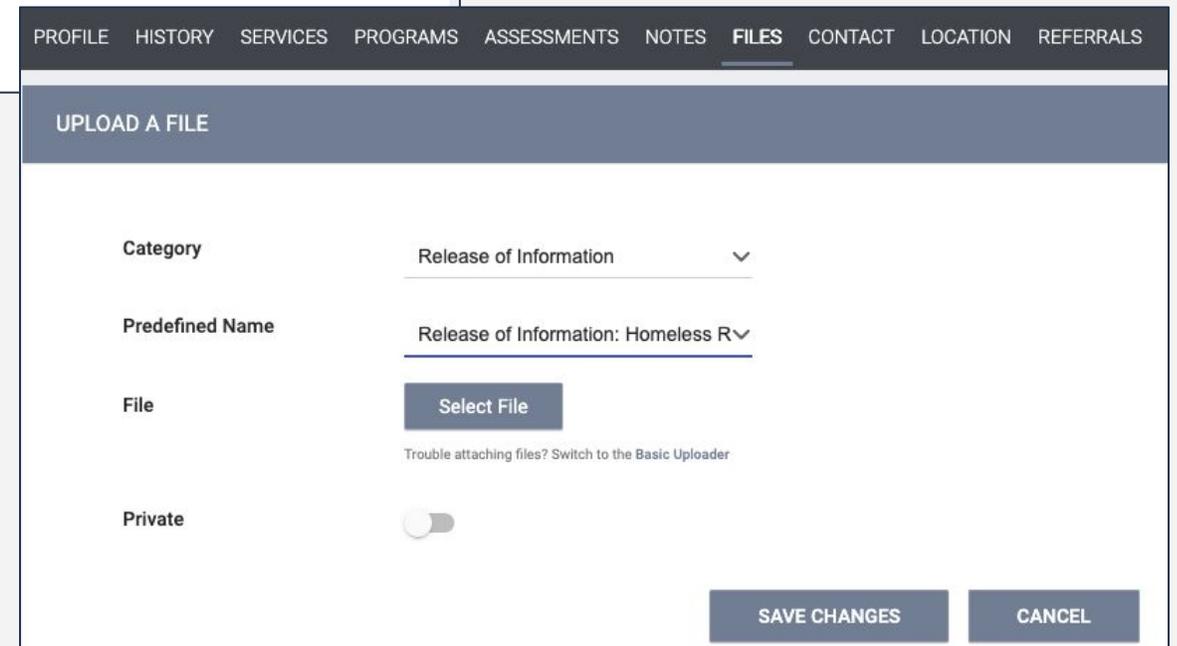
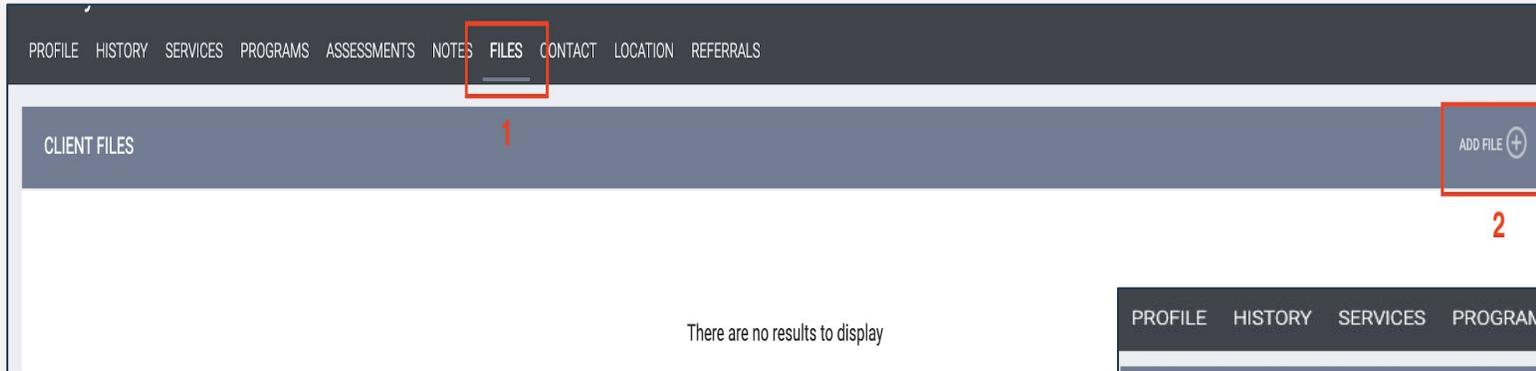
**NOTE:**  The ONE will prompt you to have the household sign a new Release of Information if the current ROI is set to expire

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



The screenshot shows a client profile for Charlee Test. A warning banner at the top states: "Release Of Information will expire in 1 days. Please review to ensure compliance." The client profile includes fields for Social Security Number, Quality of SSN, Last Name, First Name, Quality of Name, Quality of DOB, Date of Birth, Middle Name, Alias, and What is the client's gender. A modal window titled "RELEASE OF INFORMATION" is open, showing fields for Permission (Yes), Start Date (09/05/2019), End Date (09/05/2029), and Documentation (Select Electronic Signature). An "ELECTRONIC SIGNATURE FORM" overlay is also present, containing a certification statement and a list of actions: 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, and 3) reviewed the Release of Information: Human Service Agency. The form also includes a note: "Any signed Release of Information forms must be uploaded in client files." and buttons for "SAVE" and "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

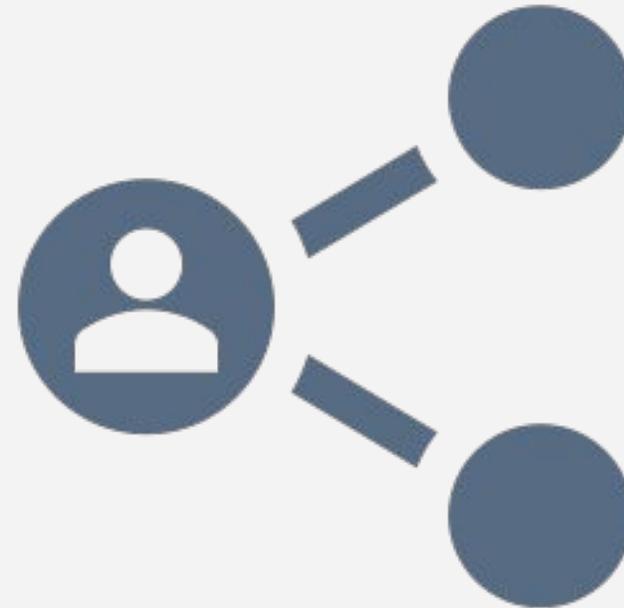




# Matchmaking

# 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

SEARCH CASELOAD REFERRALS

REFERRALS

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

Program Openings: 1,612

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

VISUALIZATION EDIT

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
46 Tenderloin Housing Clinic	Seneca Hotel	2096	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 # 632			Unit Number 632; Has Elevator; Has Stairs; Adult;	Single Adult
47 Tenderloin 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
48 Tenderloin 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** **Mode** **5** SF Adult Prioritization Assessment ✓

**Active Agency** **3** Housing Test Agency ▼ **Characteristic** -- Select -- ▼

**Project** **4** Evergreen PSH ▼ **Score Range** -- All Ranges -- ▼

**Eligible Clients Only** **3** **Sort By** 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

Mode

Characteristic

Score Range

Sort By

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**

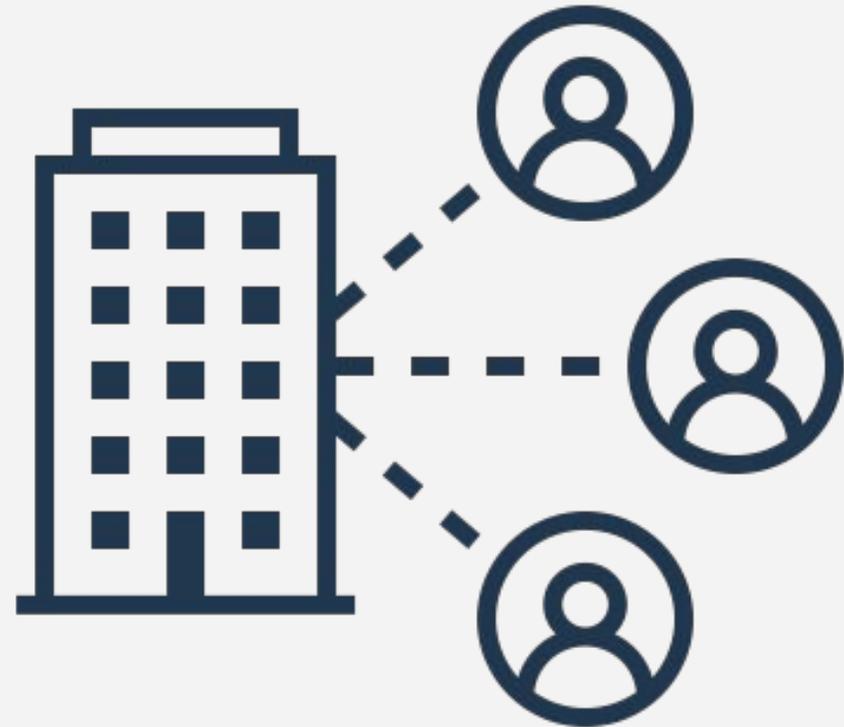
**Opening** 04/27/2019 Training Day Open Un   **2**

**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**

Program 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 EDIT

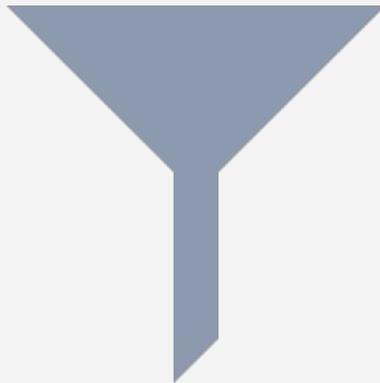
Agency Name ^	Name	ID	Date Date	Description	Project Type Code	Note	Eligibility	Unit Details (Calculation)	Population (toggles)
1	Housing Test Agency	Evergreen PSH	237	2019-02-06	PH - Permanent Supportive Housing (disability required)	Tina Test Opening #1			
2	Housing Test Agency	Evergreen PSH	242	2019-04-17	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.



The screenshot shows the 'Community Queue' interface with the following details:

- Search:** Search bar
- Active Agency:** Housing Test Agency
- Project:** Evergreen PSH
- Eligible Clients Only:** Toggle switch is turned on.
- Mode:** Characteristic (highlighted with a red box)
- SF Adult Prioritization Assessment:** -- Select --
- Score Range:** (empty)
- Sort By:** (empty)

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	

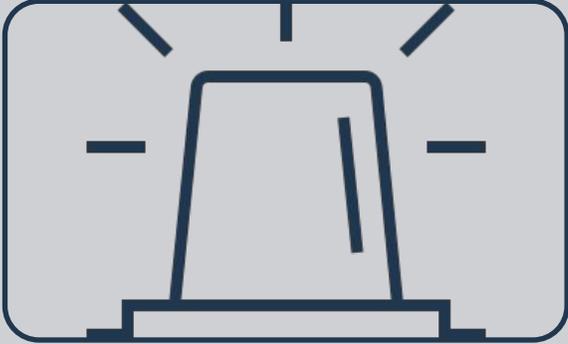
The dropdown menu for 'Characteristic' is open, showing the following options:

- 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** (highlighted in blue)

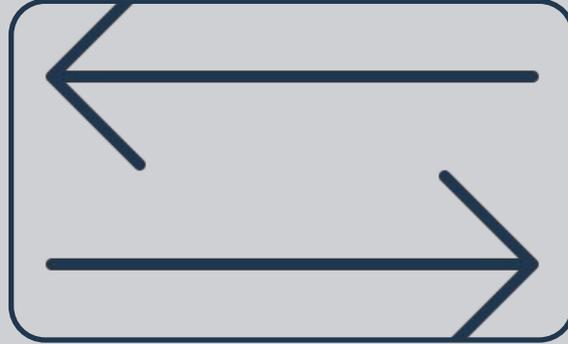
An orange arrow points from the 'Vets' option in the dropdown menu to the '02/20/2019' referral date in the table below.



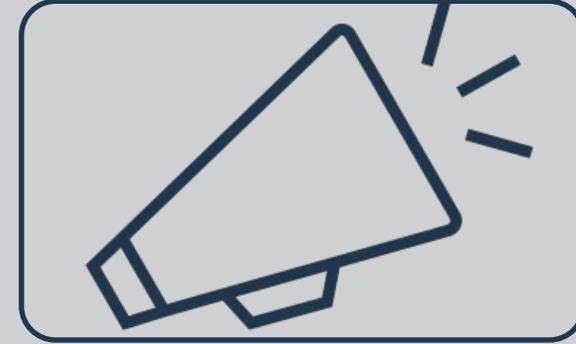
# Things to Know About Referrals



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

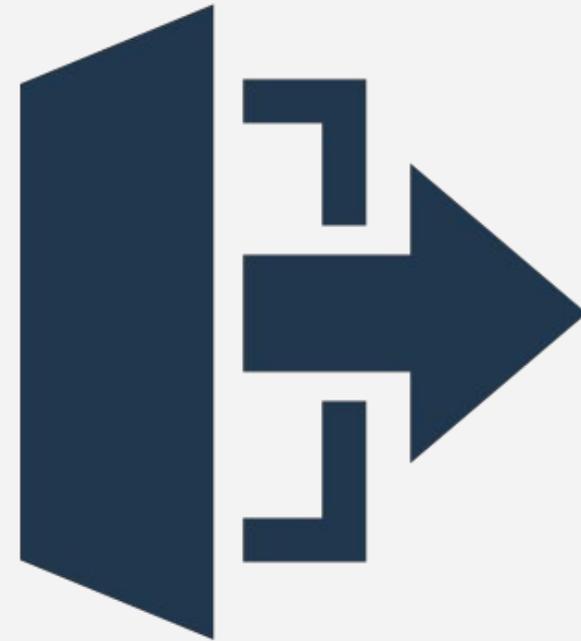




# Exits

# 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

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 software interface for managing client programs. At the top, a navigation bar includes options: PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted with a red box), NOTES, FILES, CONTACT, LOCATION, REFERRALS, and ASSESSMENTS. Below this is a 'PROGRAM HISTORY' section with a table of programs. The first program listed is 'ECS: Bayview Access Point' with a red box around its edit icon. A detailed view of this program is shown, titled 'PROGRAM: ECS: BAYVIEW ACCESS POINT'. It features tabs for Enrollment, History (selected), Provide Services, Assessments, Notes, Files, and Forms. A red box highlights an 'X Exit' button in the top right corner. At the bottom of this view, there are two buttons: 'Reopen Client Program' and 'Audit Log' (with a calendar icon showing '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	



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# Resources

## ONESF Help Center Website

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

## Bitfocus Helpdesk

[onesf@bitfocus.com](mailto:onesf@bitfocus.com)

415.429.4211

