



# Adult Coordinated Entry

## ONE System Training

# Learning Objectives

Gain an understanding of the Coordinated Entry (CE) process

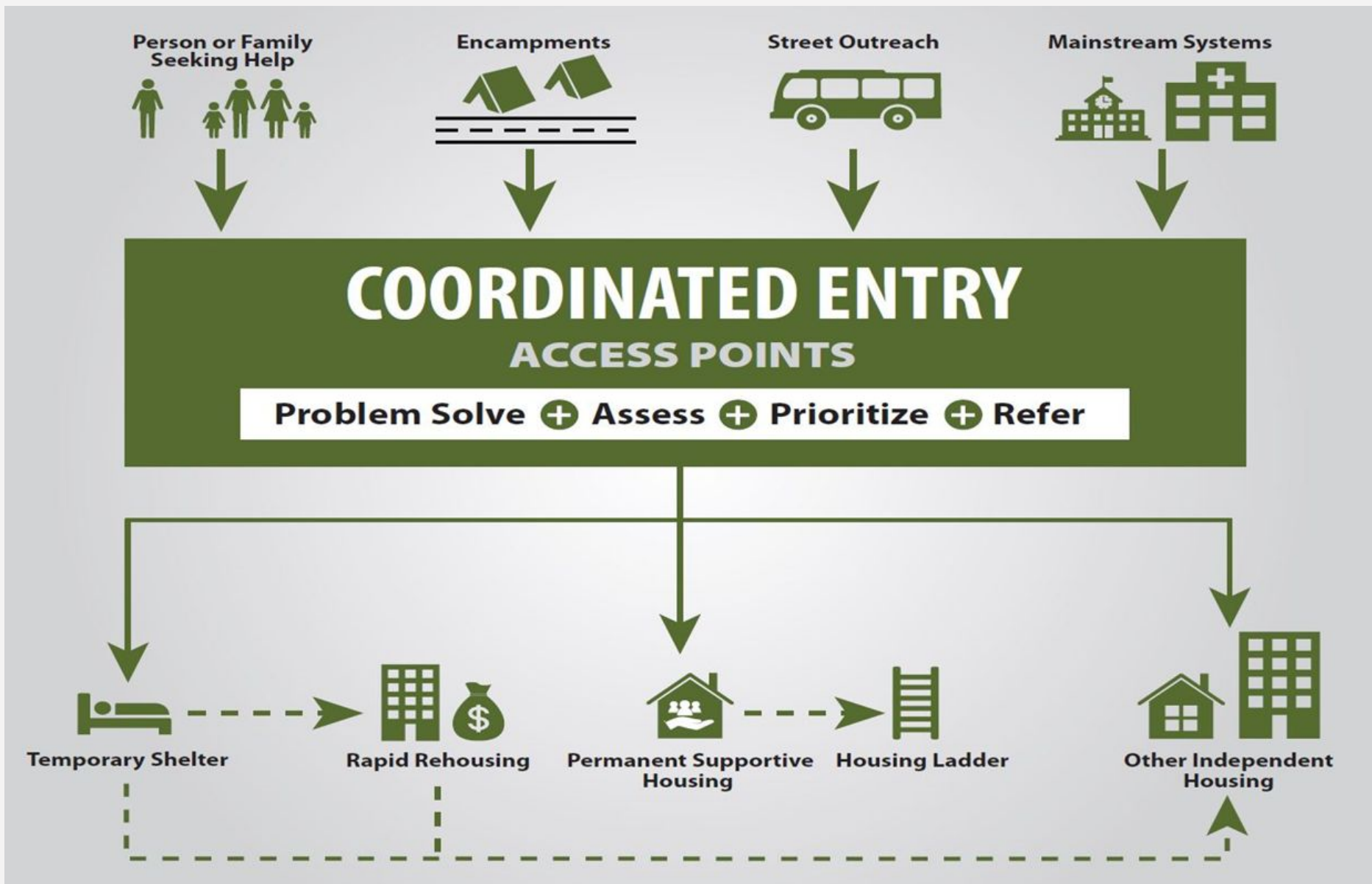
Understand tasks as they relate to CE

Observe Access Point workflow in the One System





# Getting Started in Coordinated Entry



# Getting Connected to Coordinated Entry

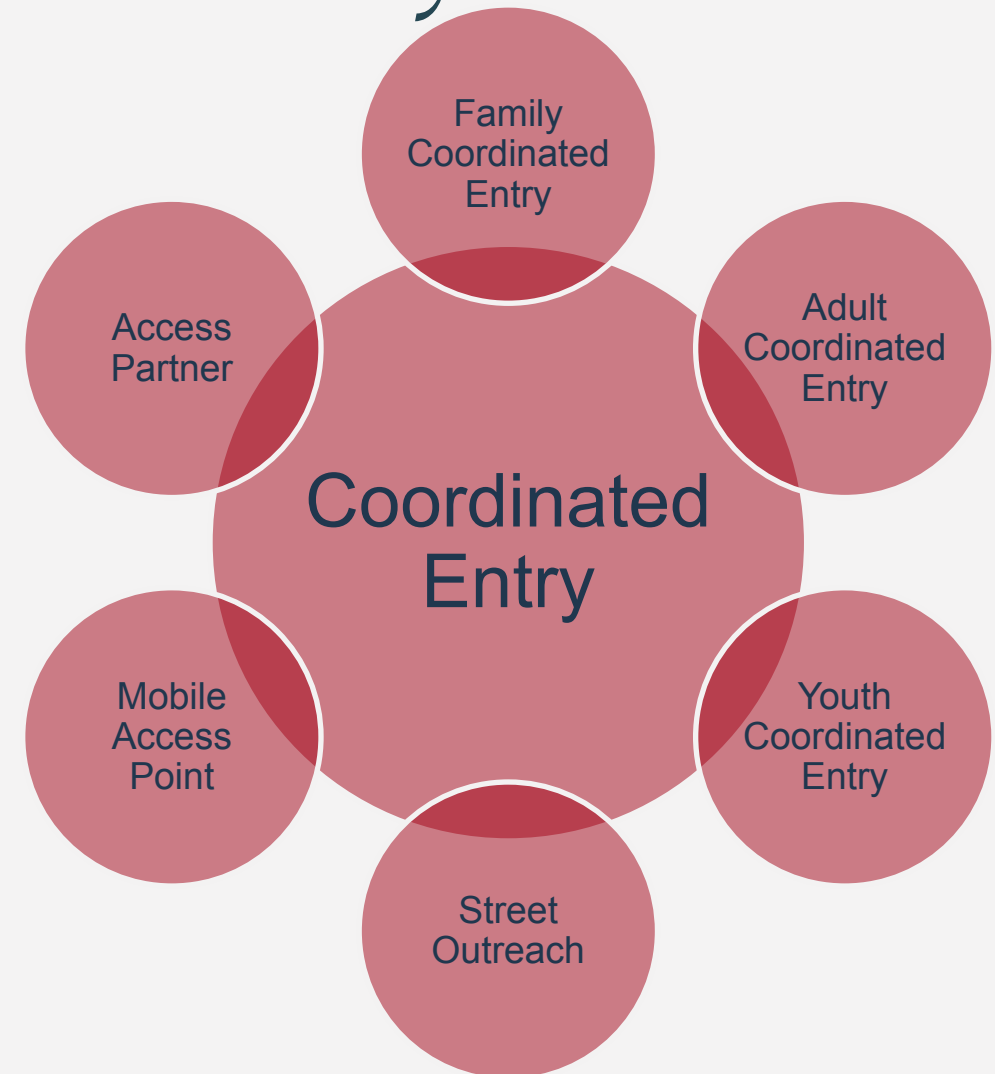
Household connect with CE through various ways:

## 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

## 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](mailto: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>



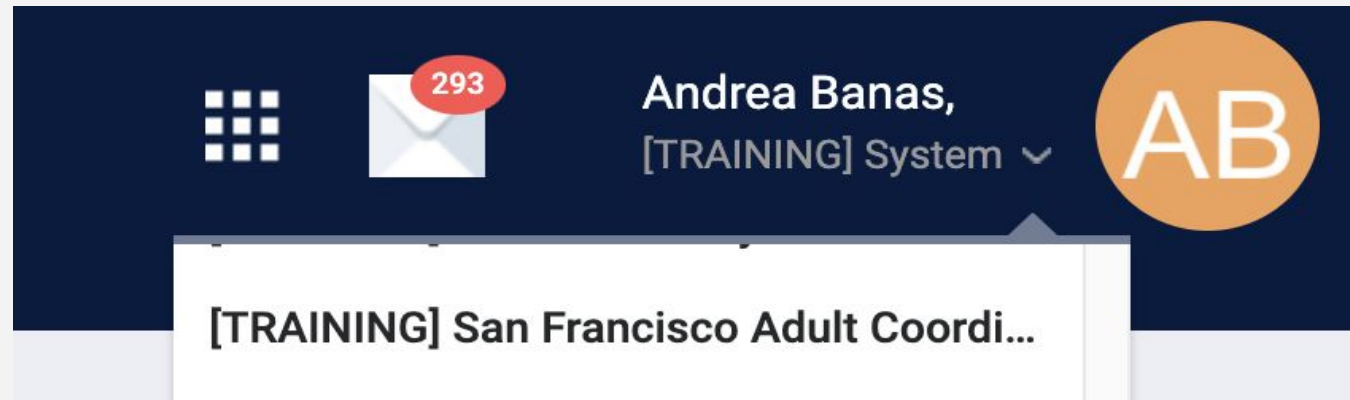




# Navigating the ONE System

# Navigating ONE

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



If you have access to multiple agencies, you will need to switch to the  
**San Francisco Adult 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.

Managed with Clarity Human Services

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				SEARCH
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	

aged 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

Select

Last Name



First Name

Quality of Name

Select

Quality of DOB

Select

Date of Birth

\_\_

\_\_

\_\_

Middle Name

None

Gender

Select

Race

Select

Ethnicity

Select

Please fill in Release of Information form

CANCEL





# 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.

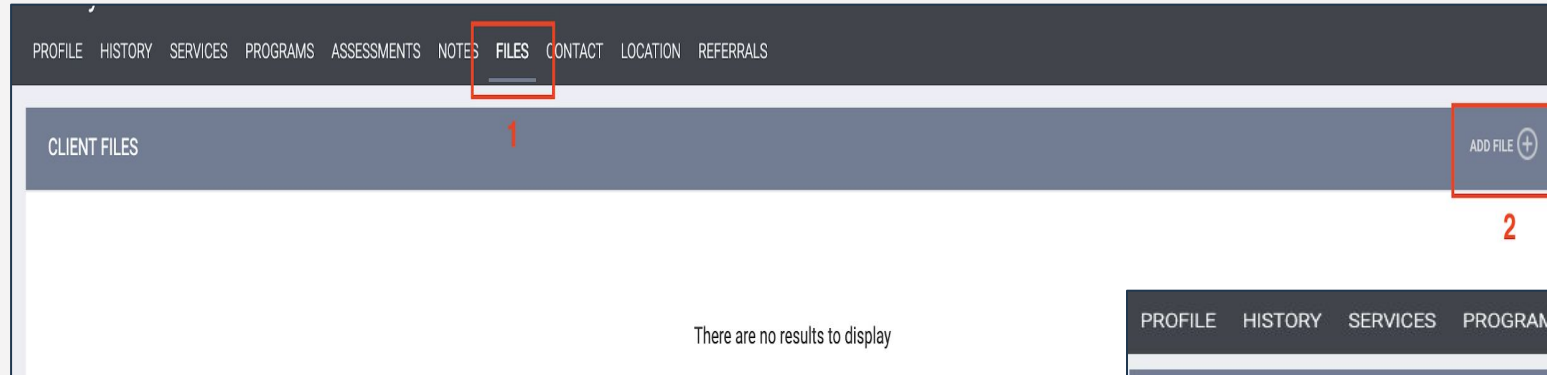
**Any signed Release of Information forms must be uploaded in client files.**

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

This screenshot shows the 'UPLOAD A FILE' form. The top navigation bar is the same as the previous screenshot. The form has a header 'UPLOAD A FILE'. Below the header, there are two rows of form fields. The first row has 'Category' on the left and a dropdown menu on the right showing 'Release of Information' with a downward arrow. The second row has 'Predefined Name' on the left and a dropdown menu on the right showing 'Release of Information: Homeless R' with a downward arrow. Below these rows is a 'File' label on the left and a 'Select File' button on the right. Below the 'Select File' button is a link that says 'Trouble attaching files? Switch to the Basic Uploader'. At the bottom of the form is a 'Private' label on the left and a toggle switch on the right. At the bottom right of the form are two buttons: 'SAVE CHANGES' and 'CANCEL'.



# Update Contact and Location Information

## Contact

## Location

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

CLIENT CONTACTS ADD CONTACT +

ADD CONTACT

Contact Type  
Email  
Phone (#1)  
Phone (#2)  
Active Contact  
Private  
Contact Date  
Note

- 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

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES **CONTACT** **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 Home

Name

Address (line 1)

Address (line 2)

City

State Alabama

Zip Code

Location Date

Active Location

Private

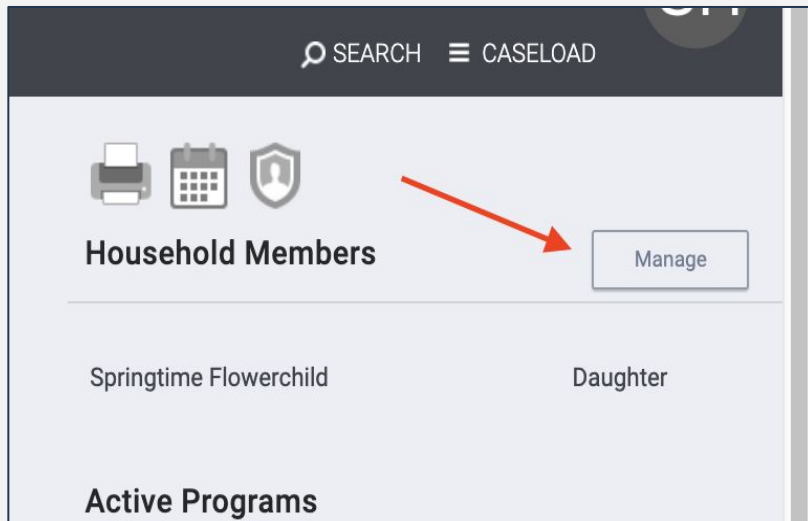
Note



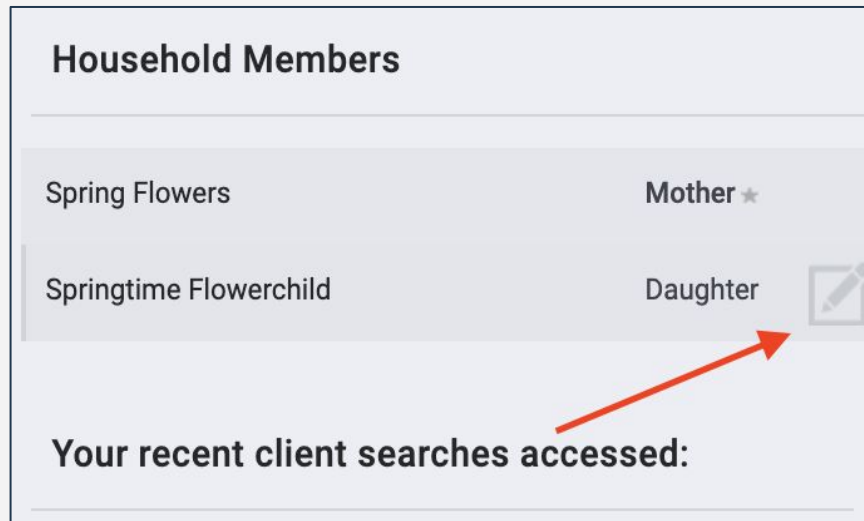


# Managing Households

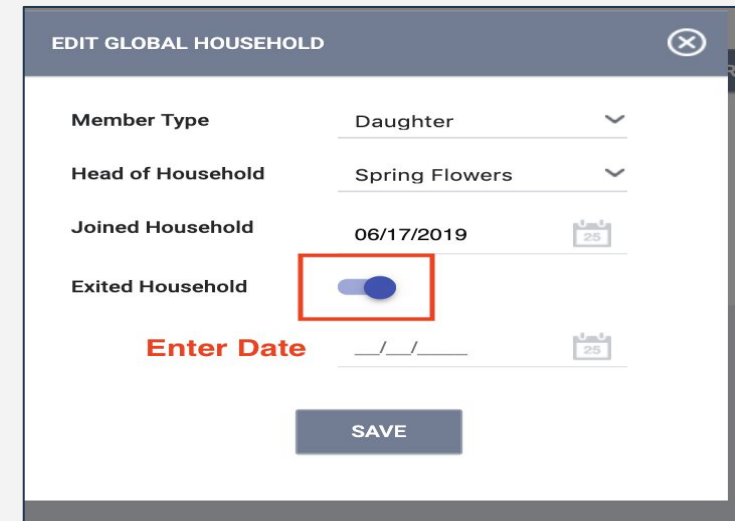
If the household is part of a family but is moving forward individually, you will need to remove the household as a family member in ONE



1

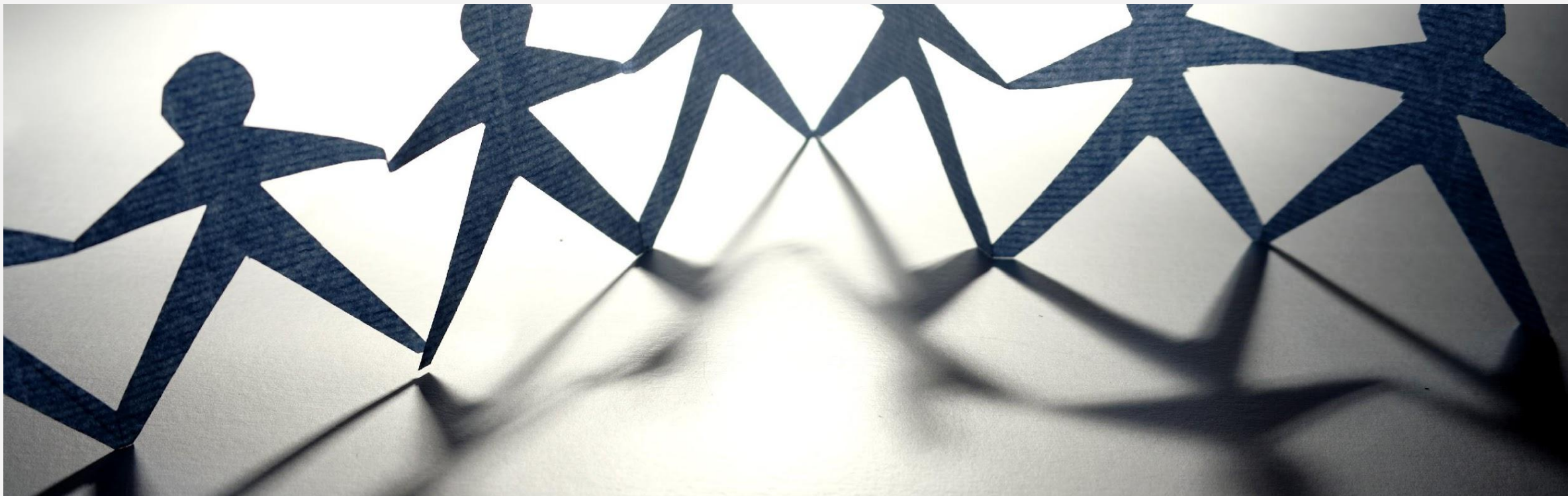


2



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



0 % Families  
100 % Individuals



### Funding Source

Other (N/A)

### Availability

Limited Availability

### Service Categories:

✓ Housing Search and Placement

✓ Other

✓ Outreach Contact

### 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 Help 25

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.**

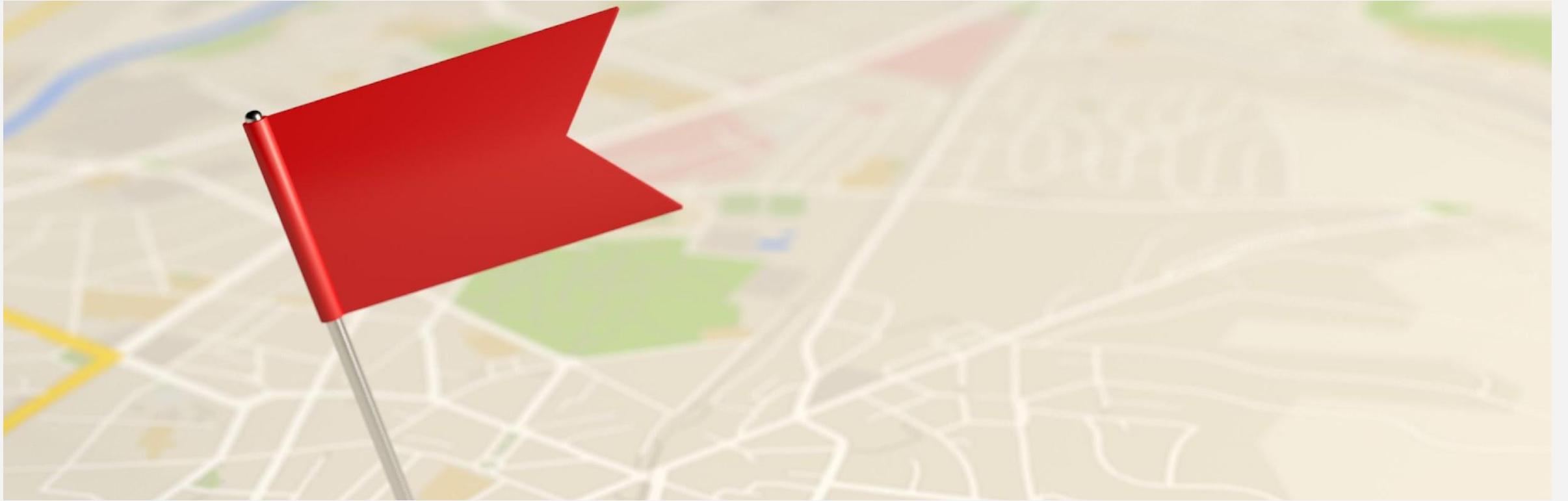
**Complete all fields when possible. Try to avoid selecting "Data not collected" when possible.**

**SAVE & CLOSE** **CANCEL**

Audit Log

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# 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 illustrates the 'Current Living Situation Assessment' process within the Bitfocus application. The interface is divided into several sections:

- Top Navigation Bar:** Contains links for PROFILE, HISTORY, SERVICES, **PROGRAMS** (highlighted), NOTES, FILES, CONTACT, LOCATION, REFERRALS, and ASSESSMENTS.
- PROGRAM HISTORY:** A table listing programs. The first entry is 'ECS: Bayview Access Point' with a sub-entry '[TRAINING] San Francisco Adult Coordination'. A red box highlights the edit icon next to this entry.
- Program Detail View:** Displays details for 'PROGRAM: ECS: BAYVIEW ACCESS POINT'. It includes a sub-navigation bar with links for Enrollment, History, Provide Services, **Assessments** (highlighted), Notes, Files, and Forms. An 'Exit' button is located in the top right corner.
- Assessments Section:** Shows a list of assessments, with 'Current Living Situation' highlighted in green.
- Add Program Assessment Modal:** A dialog box titled 'ADD PROGRAM ASSESSMENT' with a close button. It features a toggle switch for 'Pita Pocket' (which is turned on) and a radio button for 'Grandchild'. Below these options is a red-bordered button labeled '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 building)

Living Situation Verified By Bayview Access Point

Location Details

Select

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

Date of Contact

10/14/2019



Current Living Situation

Hospital or other residential non-psychiatric medical facility

▼

Living Situation Verified By

ECS: Bayview Access Point

▼

Is client going to have to leave their current living situation within 14 days?

Yes

▼

Has a subsequent residence been identified?

Select

▼

Does individual or family have resources or support networks to obtain other permanent housing?

Select

▼

Has the client had a lease or ownership interest in a permanent housing unit in the last 60 days?

Select

▼

Has the client moved 2 or more times in the last 60 days?

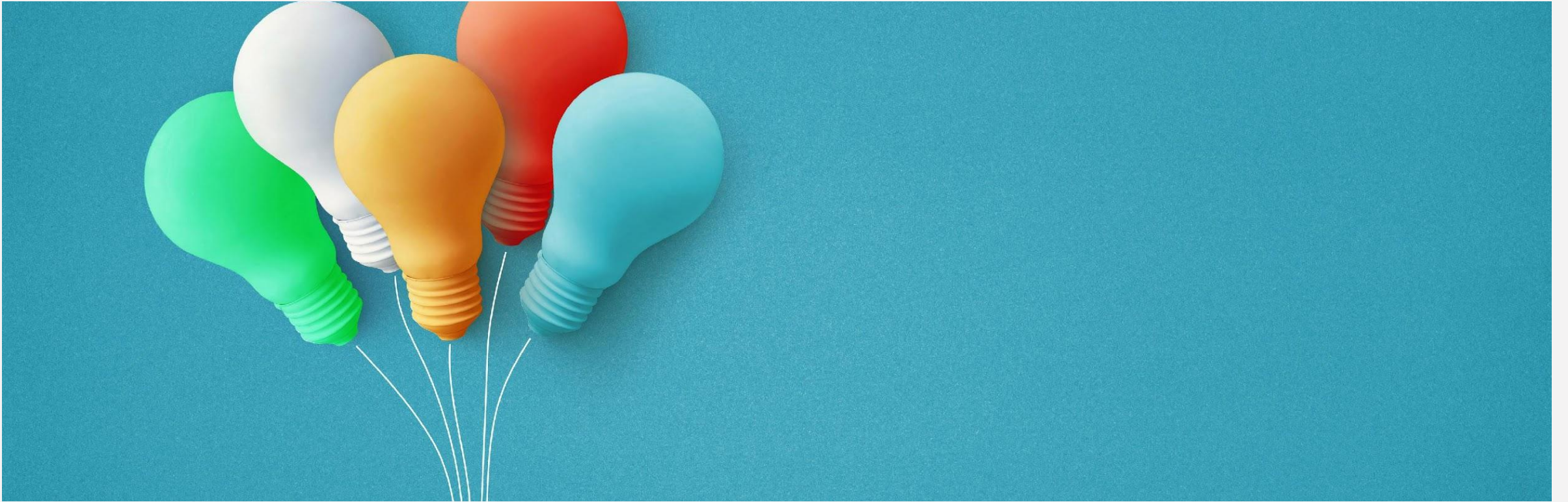
Select

▼

Location Details

Additional questions may populate based on the client's responses





# Updates to Coordinated Entry



# Update to CE Events

## What's New?

### Beginning 11/14:

- CE Events will be manually recorded in the ONE System by Users.
- The system automatically records Inferred events through referrals based on project type or funding source criteria.

### Why?

- These changes will allow for greater flexibility in recording CE Events and introduce the ability to import all CE Event values into the system.



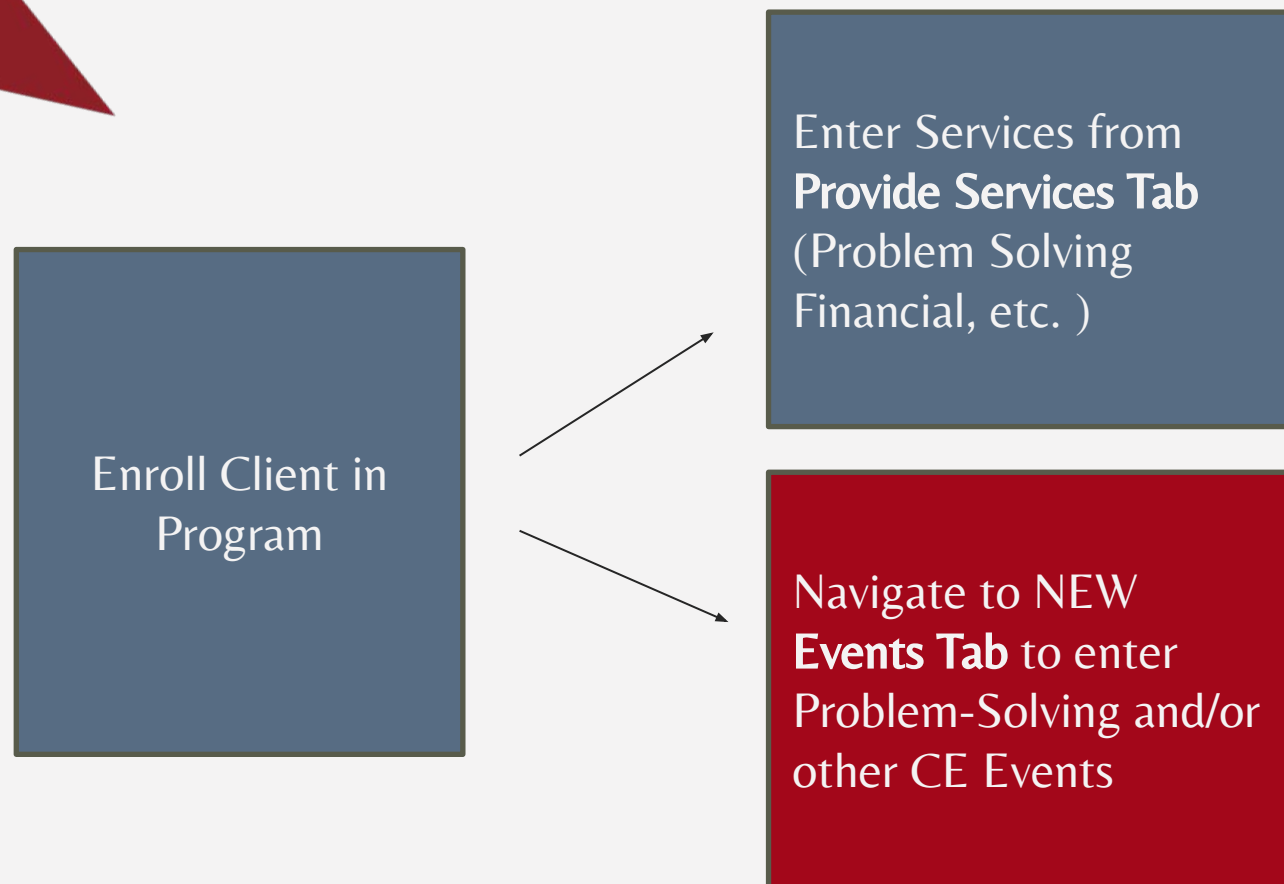
# Problem-Solving Services and Events

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



**NEW!**

# Changes to User Workflow



Depending on the client's situation, you may provide Services through the “Services” tab, or log the interaction on the “Events” tab.

For example, a Problem Solving Conversation would be logged under the “Events” Tab.



NEW!

# Coordinated Entry Events 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



# Update to 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





# Update to 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

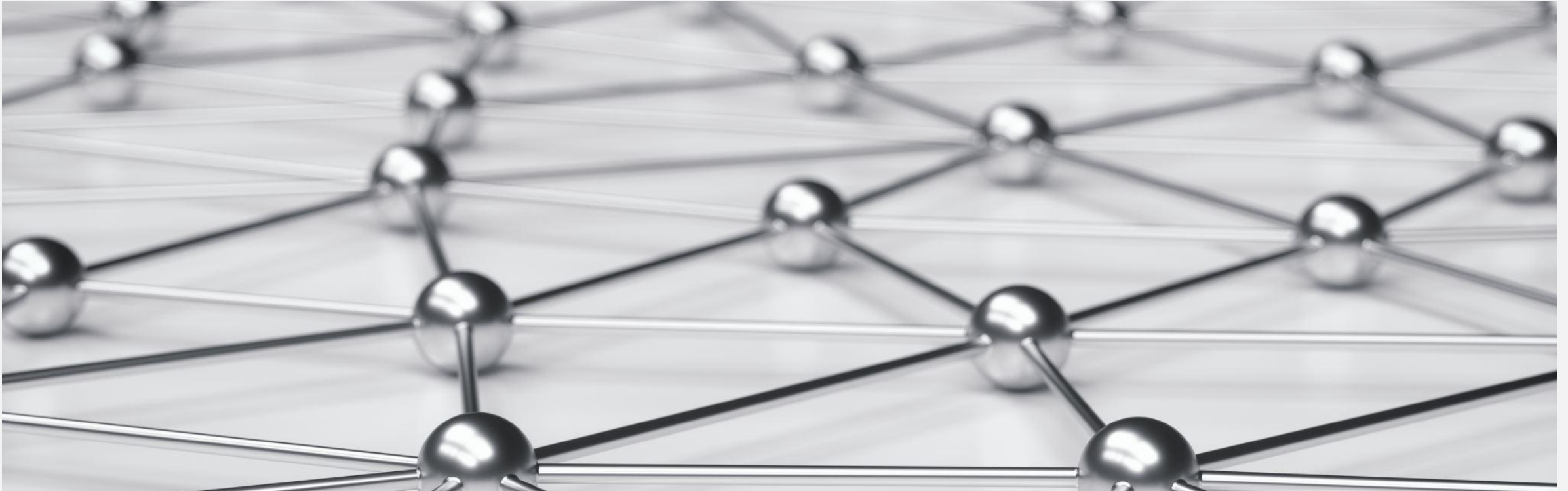
Problem Solving: Initiated Problem Solving Conversation

Problem Solving Mediation Services: Mediation

Problem Solving Conversation: Problem Solving Conversation

Problem Solving Housing Location Assistance: Problem Solving Housing Location Assistance





# Problem Solving

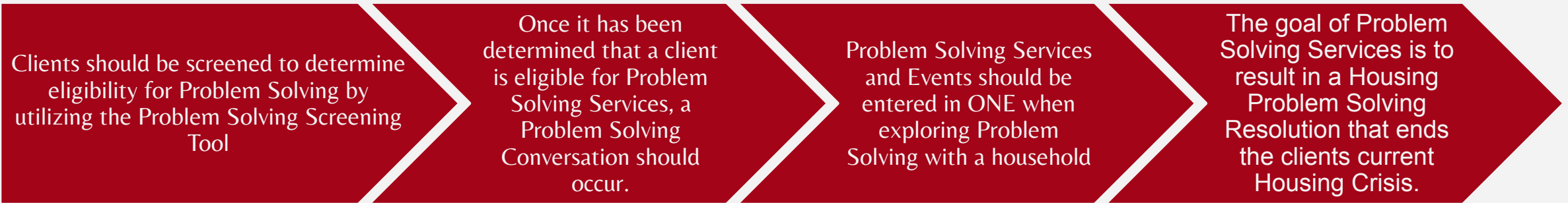
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# Problem Solving

- 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)



# Problem Solving Services



The narrative of the note should include details of the conversation with the household; including any Problem-Solving solutions being explored.

More information on Problem Solving Training is located on the SF ONE System Support site at:  
[Onesf.bitfocus.com](https://Onesf.bitfocus.com)



# Problem Solving Services

Problem Solving  
Financial services  
are captured within  
program  
enrollments

PROGRAM: ECS: SOMA ACCESS POINT

Enrollment

History

Provide Services

Events

Assessments

Notes

Files

Forms

✕ Exit

Services

Background Check Complete

Housing Search and Placement

Problem Solving Financial Assistance

Financial

Unique Circumstances

Other







## Remember!


If Problem Solving results in a Problem-Solving Resolution, you must:


1. Log the Financial Assistance as a service,
2. And log the resolution as a conversation in the events tab.

# Problem Solving Services

Problem Solving Financial Assistance Financial ▾



Car repair, registration, smog tests, insurance, or payment, if reasonable and directly linked to housing resolution ^

Event Date: 12/20/2022 

Expense Amount: 0.00 Expense Date: 12/20/2022 

Funding Source: General Funds ▾

Service Note:


**B** **I**  


Coordinated Entry Events

Problem Solving/Diversion/Rapid Resolution intervention or service ▾



Problem Solving Mediation Services: Mediation ▾

Problem Solving Conversation: Problem Solving Conversation ^

Date: 12/20/2022 

Result: Client housed/re-housed in a safe alternative Yes ▾ Result Date: 

Event Note:

**B** **I**  



# Outcome/Result

For Problem Solving Events:

If the result of Problem Solving event is:

- “Client Housed/Re-Housed in a Safe Alternative = Yes” is a resolution, and the household should be exited from PS/CE Program in ONE.

The screenshot shows a web form titled "Problem Solving Conversation" with a "Coordinated Entry Event" link in the top right. The form contains the following fields:

- Start Date:** 09/15/2020 (with a calendar icon)
- End Date:** 09/15/2020 (with a calendar icon)
- Result:** Client housed/re-housed in a safe alternative: -- Select -- (with a dropdown arrow)
- Service Note:** A text area with formatting icons (B, I, bulleted list, numbered list).
- SUBMIT** button in the bottom right corner.

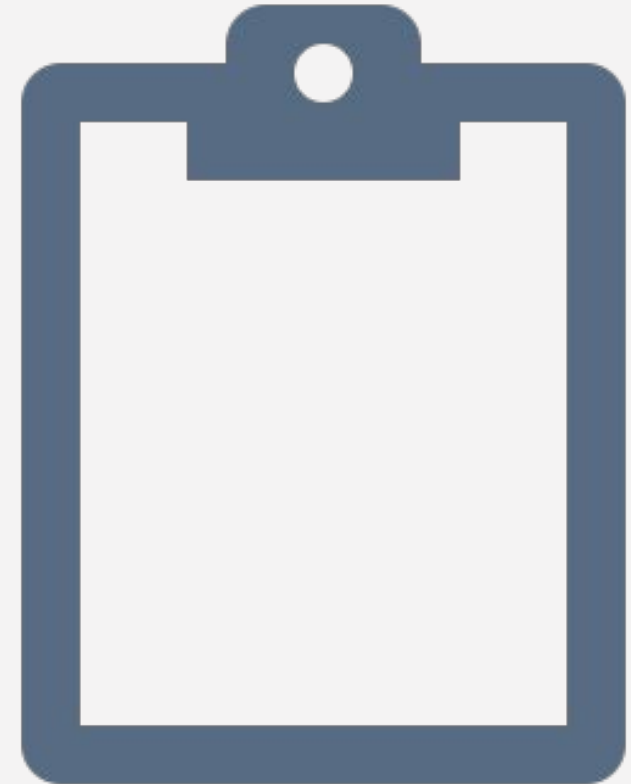




# Housing Primary Assessment

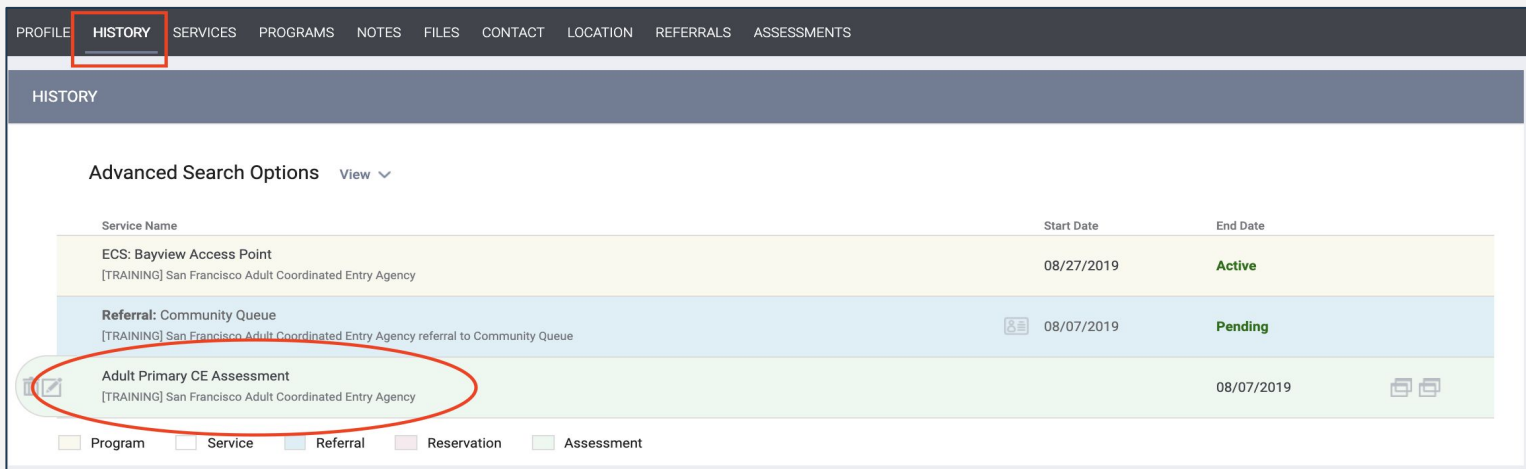
# Housing Primary Assessment

- 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



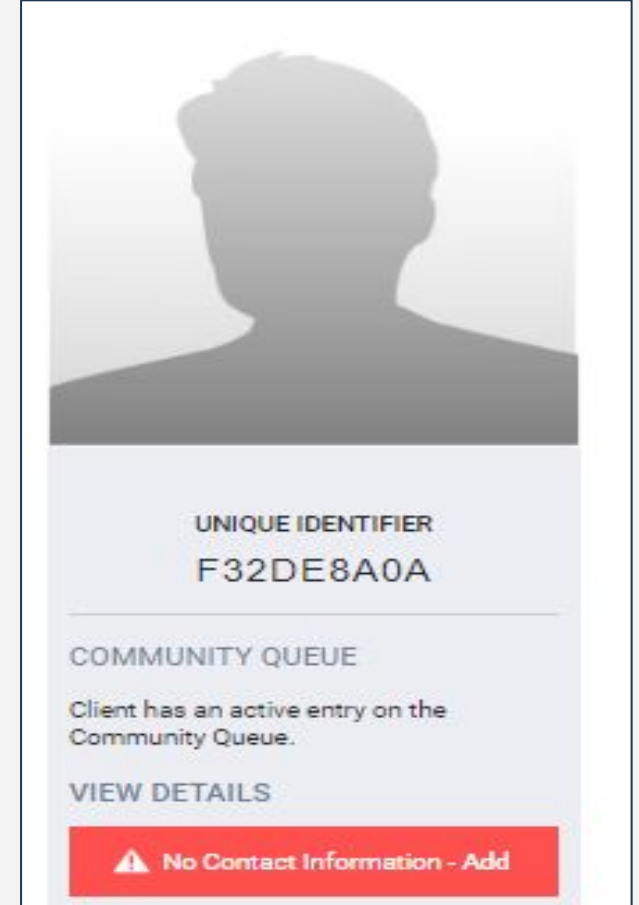
PROFILE **HISTORY** SERVICES PROGRAMS NOTES FILES CONTACT LOCATION REFERRALS ASSESSMENTS

HISTORY

Advanced Search Options View ▾

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	

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 Bend 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	
✓ In person	

Select	Assessment level should be
Crisis Needs Assessment	Housing Needs
✓ Housing Needs Assessment	Assessment



# Completing the Assessment in ONE

ADULT PRIMARY CE ASSESSMENT

Assessment Date08/28/2019

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



# 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 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
<b>Adult Priority PRE-SCREEN TOTAL 90</b>			

☐ Permanent Supportive Housing Queue

☐ CAAP PSH Queue

☐ Rapid Rehousing Queue

☐ Stabilization Rooms Queue (SFHOT Management Only)

REFER DIRECTLY TO COMMUNITY QUEUE(S)



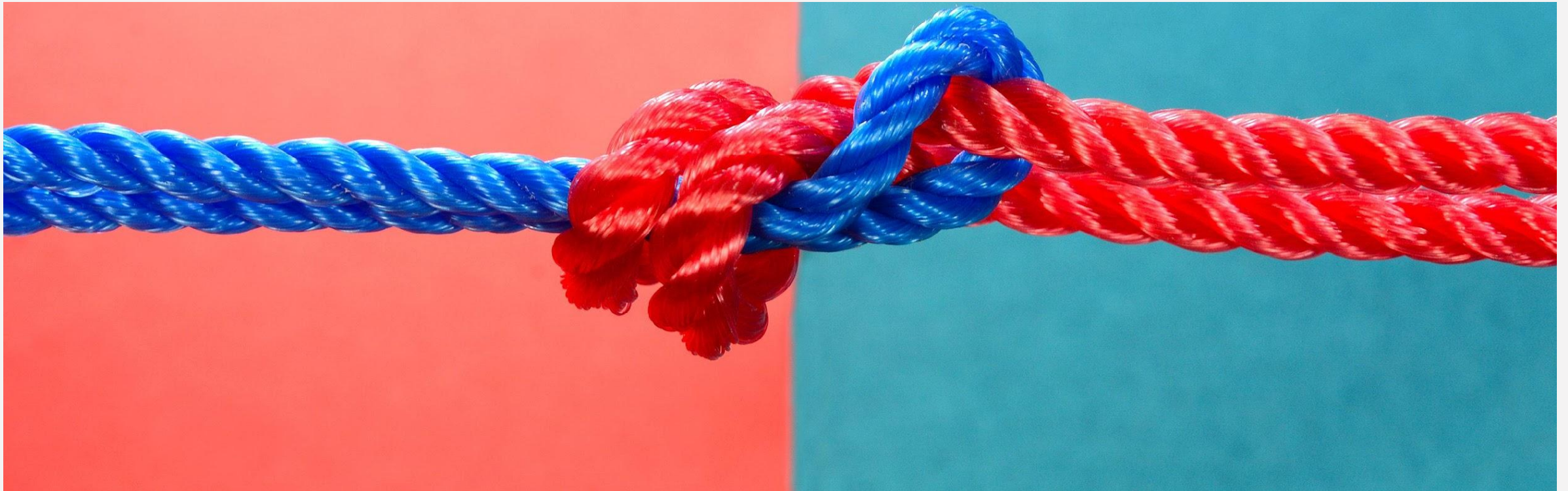
# Housing Referral Status

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 <span>View ▾</span>									
Service Name		Start Date		End Date					
 <b>Referral: Community Queue</b> 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					

SAVE CHANGES

CANCEL


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

NOTES



# “Checking in” households



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

Teddy Bear

PROFILE HISTORY SERVICES PROGRAMS NOTES FILES CONTACT LOCATION REFERRALS ASSESSMENTS

HISTORY

Advanced Search Options View

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

CHECK-IN

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# Remember...

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





# Uploading Documents

# Uploading Documents into ONE

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

CLIENT FILES

ADD FILE +

There are no results to display



UPLOAD A FILE

Category Background Check

Predefined Name Credit, Criminal, and/or Eviction-T

File Select File

Private

Trouble attaching files? Switch to the Basic Uploader

SAVE CHANGES CANCEL

Select a category and a predefined name from the drop downs.

Click Select file and then chose the file from your computer you need to upload.

Click Save





# 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

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, a section titled 'PROGRAM HISTORY' lists several programs. The first program, 'ECS: Bayview Access Point', is highlighted with a red box around its edit icon. 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 corner of this modal, there is a red box around the 'X Exit' button. At the bottom of the modal, there is a 'Reopen Client Program' button and an 'Audit Log' button with a calendar icon showing the date 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

