

How to Complete a Family Coordinated Entry Eligibility Assessment and Enrollment

This document outlines the necessary steps for getting a family started in the coordinated entry process including an enrollment into the Family Coordinated Entry program.

Search/Add New Clients, Configure Household, & Update Contact Info

Step 1: Log in to the ONE System and click on the dropdown arrow (under your name) to change to the “San Francisco Family Coordinated Entry Agency”.



Step 2: Search for the family’s Head of Household in the client search bar. Search can be conducted by entering a partial first name, partial last name, alias, Date of Birth, or Social Security Number. *Note: Search for the person before creating a new profile to avoid creating duplicate profiles in the ONE System.*

If you find the person in the system, click edit to the left of the person’s name to open their profile screen. If you cannot find the client, create a profile for them by selecting “ADD CLIENT”.



Procedure: [How do I create a new client?](#)

Step 3: Once the head of household has a profile, they need to be grouped into a household with the rest of household members. They will also need their contact and location information updated. Reference the relevant procedures if guidance is needed for these steps.

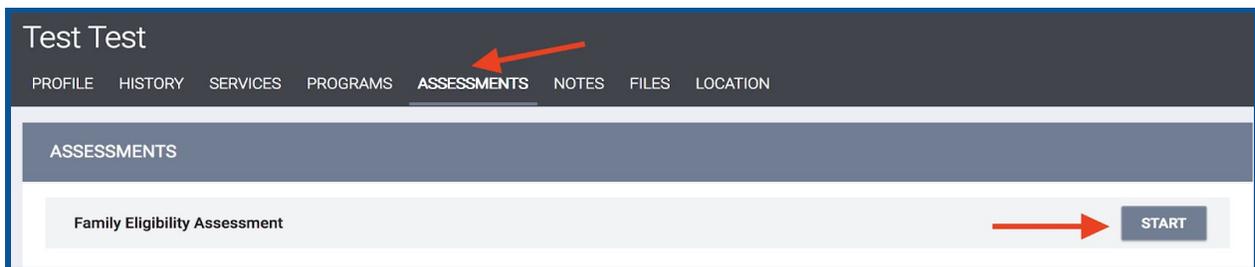
Procedure: [How to Create a Household?](#)

Procedure: [Use of the Location Tab](#)

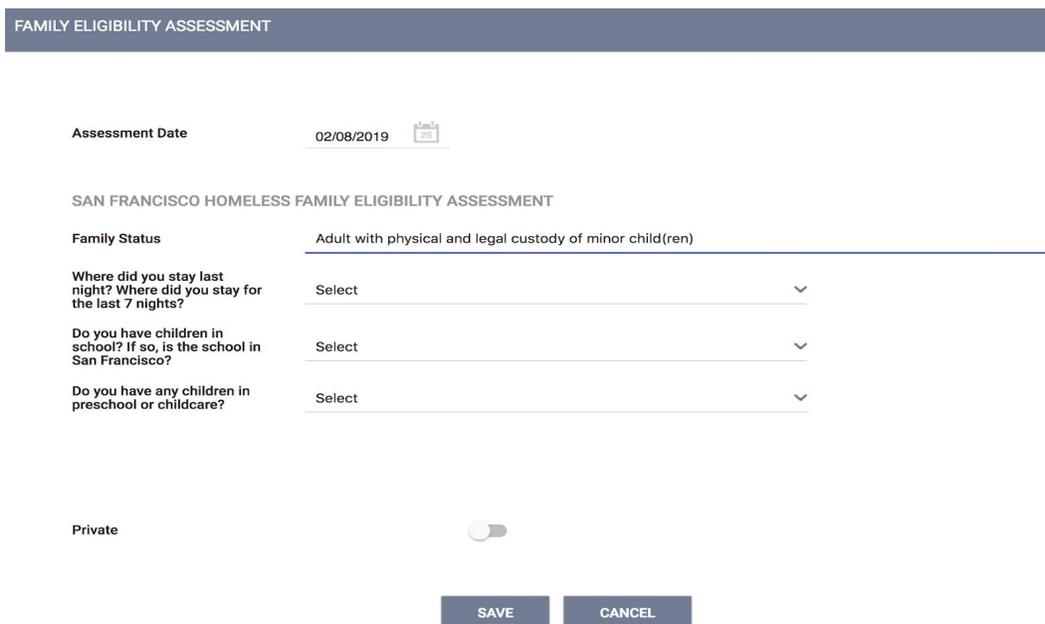
How to Complete a Family Coordinated Entry Eligibility Assessment and Enrollment

Completing the Eligibility Assessment

Step 1: Click the “Assessment” tab. Click “Start” next to the Family Eligibility Assessment.



Step 2: Complete all of the fields and click “Save”.



The screenshot shows the 'FAMILY ELIGIBILITY ASSESSMENT' form. At the top, it says 'FAMILY ELIGIBILITY ASSESSMENT'. Below that, there is a field for 'Assessment Date' with the value '02/08/2019' and a calendar icon. The form title is 'SAN FRANCISCO HOMELESS FAMILY ELIGIBILITY ASSESSMENT'. The 'Family Status' is set to 'Adult with physical and legal custody of minor child(ren)'. There are three dropdown menus: 'Where did you stay last night? Where did you stay for the last 7 nights?' (set to 'Select'), 'Do you have children in school? If so, is the school in San Francisco?' (set to 'Select'), and 'Do you have any children in preschool or childcare?' (set to 'Select'). There is a 'Private' toggle switch which is currently turned off. At the bottom, there are 'SAVE' and 'CANCEL' buttons.

Step 3: If the family is determined to be a “San Francisco Homeless Family” as indicated at the bottom of the assessment, the family should then be enrolled in a Family Coordinated Entry Program. If they are determined to not be a family or are from a different region, direct them towards an Adult Access Point or their current county.

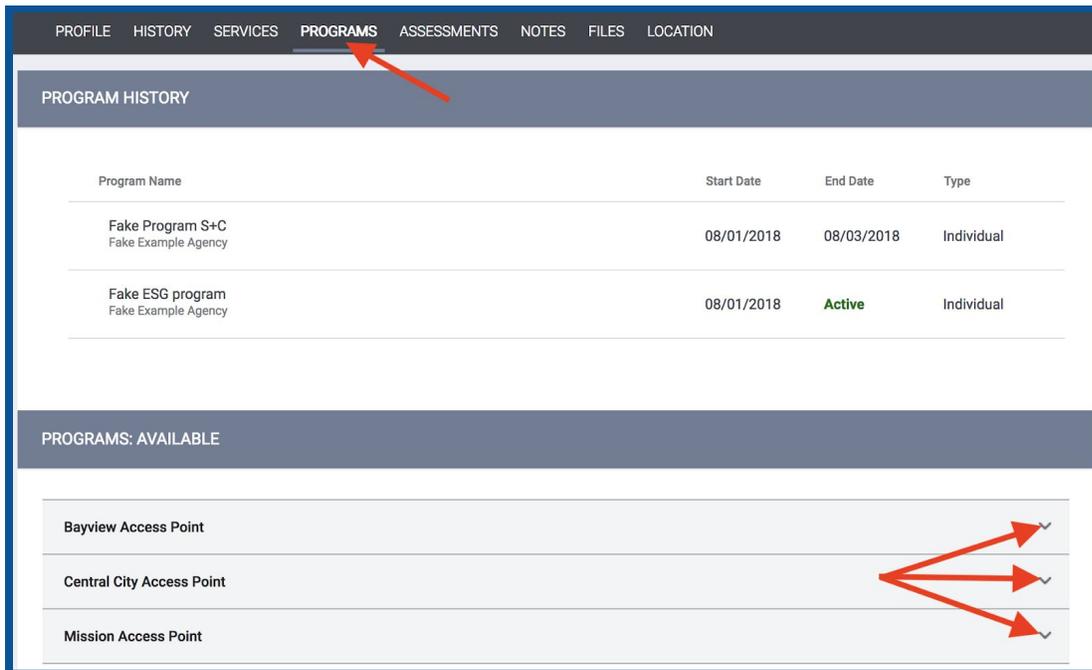


The screenshot shows the 'ELIGIBILITY ASSESSMENT RESULTS (NO RESPONSE NEEDED):' section. It features a dropdown menu with the selected option: 'This is a San Francisco homeless family. Proceed to Family Housing Problem-Solving Assessment'. The text '*****' is visible to the left of the dropdown. The entire dropdown menu is circled in red.

How to Complete a Family Coordinated Entry Eligibility Assessment and Enrollment

Enroll a Family in the Coordinated Entry Program

Step 1: Click the “PROGRAMS” tab. Click the drop down arrow next the the Access Point that the family is engaging.



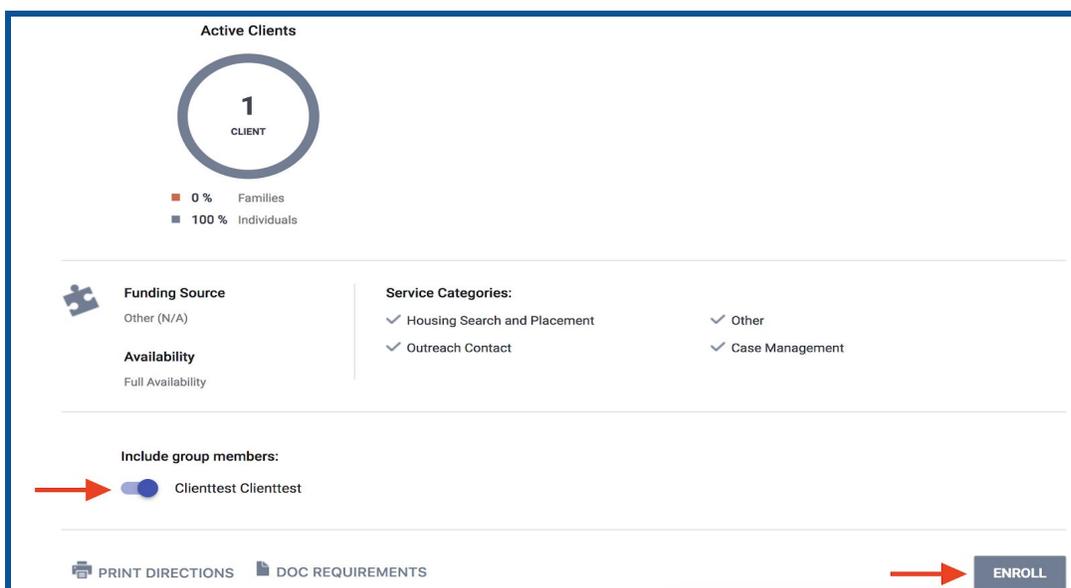
PROGRAM HISTORY

Program Name	Start Date	End Date	Type
Fake Program S+C Fake Example Agency	08/01/2018	08/03/2018	Individual
Fake ESG program Fake Example Agency	08/01/2018	Active	Individual

PROGRAMS: AVAILABLE

- Bayview Access Point ✓
- Central City Access Point ✓
- Mission Access Point ✓

Step 2: Be sure to include the other household members in the enrollment process. To do so, activate the “Include group members” toggle next to the desired household members and then click “Enroll”.



Active Clients

1 CLIENT

0 % Families
100 % Individuals

Funding Source
Other (N/A)

Availability
Full Availability

Service Categories:

- ✓ Housing Search and Placement
- ✓ Outreach Contact
- ✓ Other
- ✓ Case Management

Include group members:

Clienttest Clienttest

PRINT DIRECTIONS DOC REQUIREMENTS ENROLL

How to Complete a Family Coordinated Entry Eligibility Assessment and Enrollment

Step 5: Complete the program enrollment questions for each household member independently and select “SAVE & NEXT” until you enroll the last Household member upon which you will select “SAVE & CLOSE”. The ‘Project Start Date’ is the date that the client visits and engages the Access Point.

CASH INCOME FOR INDIVIDUAL		
Income from Any Source	No	▼
NON-CASH BENEFITS		
Receiving Non-Cash Benefits	No	▼
HEALTH INSURANCE		
Covered by Health Insurance	No	▼
<input type="button" value="SAVE & CLOSE"/> <input type="button" value="CANCEL"/>		