# 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?](link)

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.
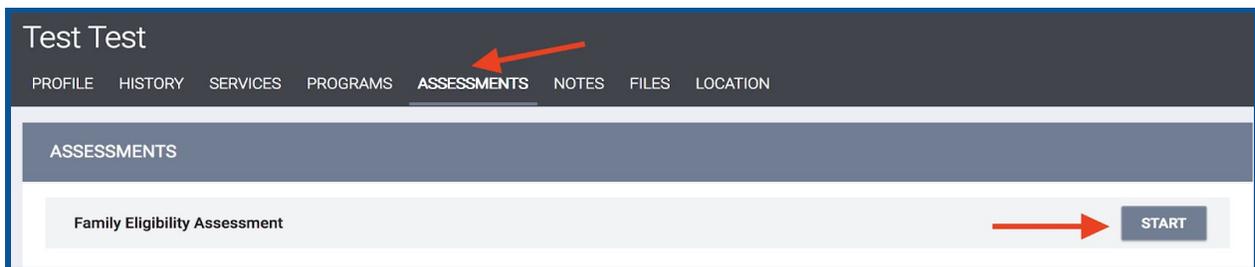Procedure: [How to Create a Household?](link)
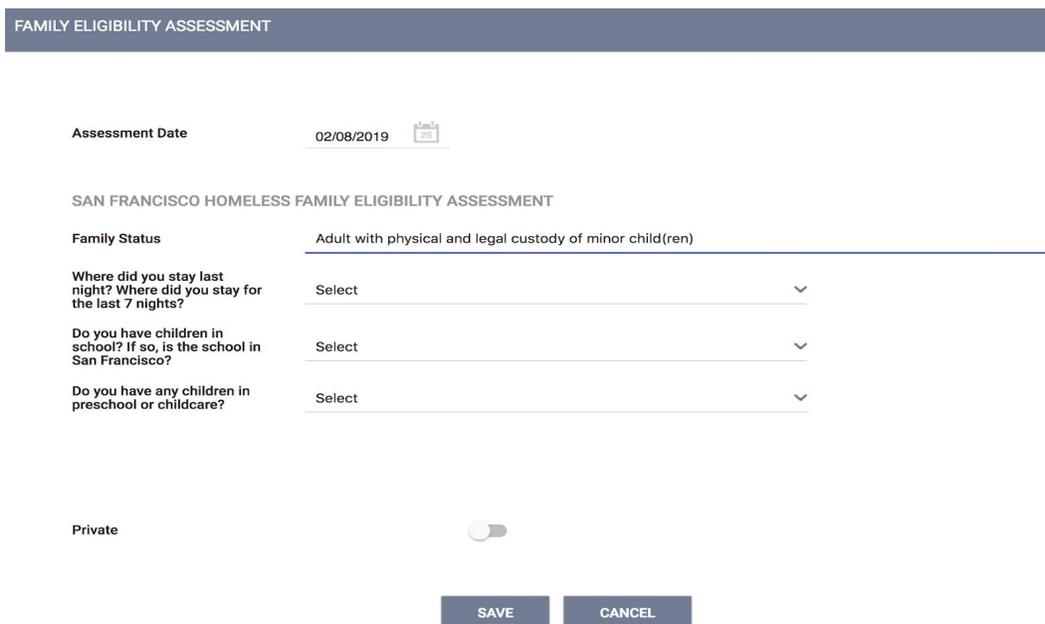Procedure: [Use of the Location Tab](link)

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**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".



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.
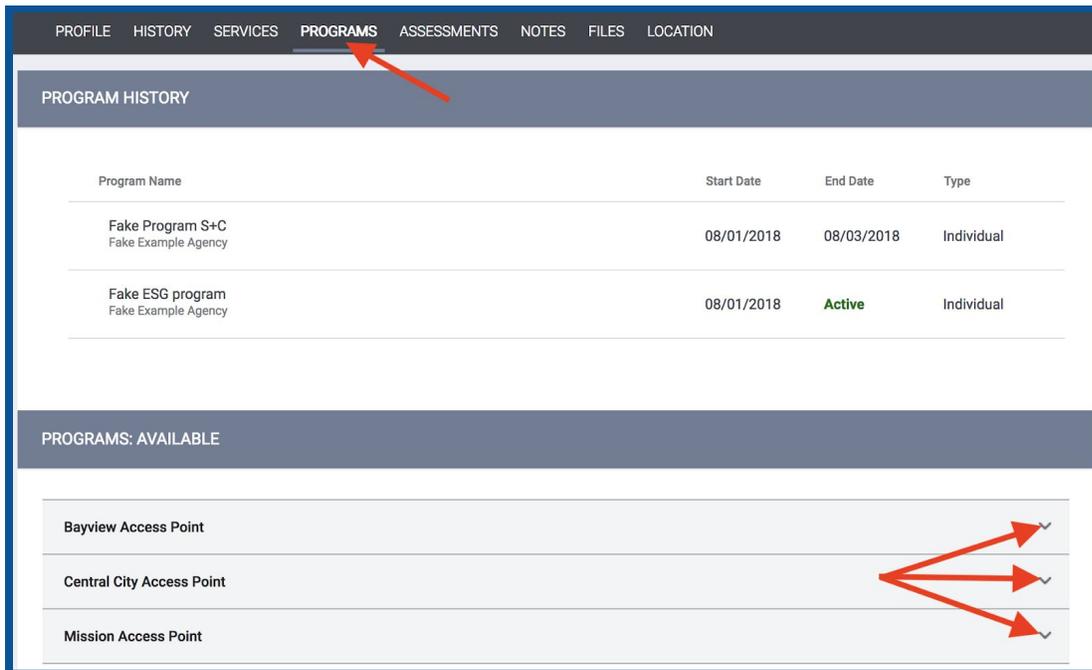
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## Enroll a Family in the Coordinated Entry Program

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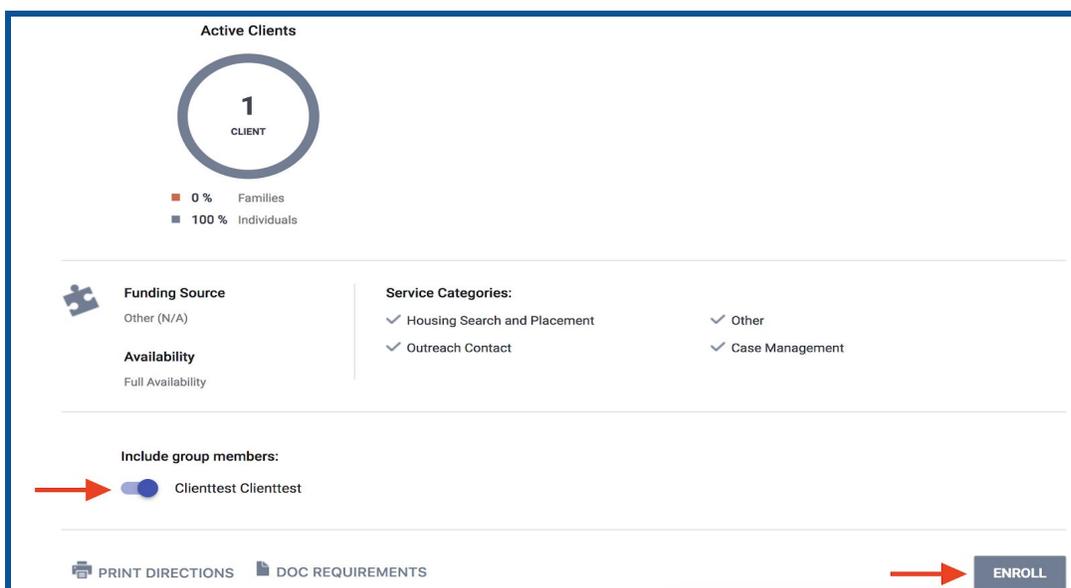


Step 2: Be sure to include the other household members in the enrollment process. To do so, activate the "Include group members" toggle next to the desired household members and then click "Enroll".

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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 ⌄ |

SAVE & CLOSE     CANCEL