

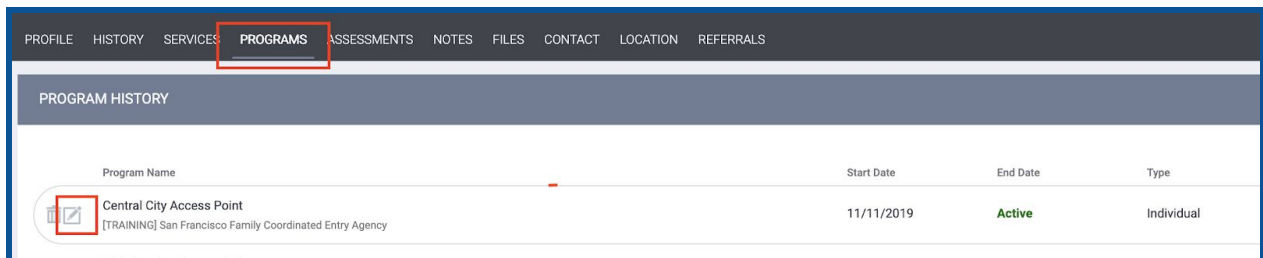
## ONE System Family CE Shelter Placement Process

This document will outline the process to get a family onto the individual shelter room placement list, getting them verified as unsheltered, reviewing the placement list, connecting the family to congregate shelter, and the process for referring the highest priority family to an individual shelter room.

### Complete the Shelter (Individual Room) Placement Criteria Assessment

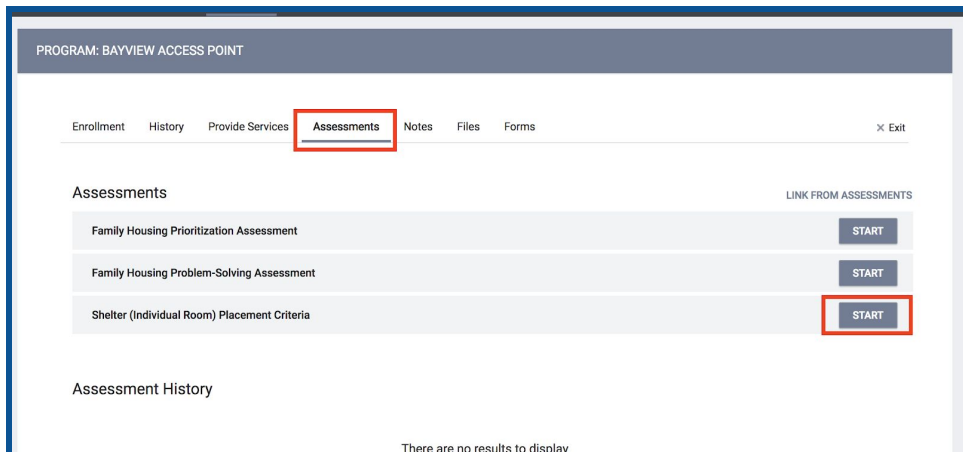
**Step 1:** Click the program level “Assessment” tab. *Note: You must be in the client’s Coordinated Entry program enrollment screen to see this assessment tab.*

- Families interested or in need of shelter should complete a ‘Shelter (Individual Room) Placement Criteria’
- Prior to completing the “Shelter Placement Criteria” check the client’s History or Assessments tab to see if they already have one completed.
  - A new ‘Shelter Placement Criteria’ should only be created if they have already gone through the shelter placement process and they are starting it over again.
- If they already have a ‘Shelter Placement Criteria’, that existing criteria can be referred to the Emergency Shelter CQ.



Program Name	Start Date	End Date	Type
Central City Access Point [TRAINING] San Francisco Family Coordinated Entry Agency	11/11/2019	Active	Individual

**Step 2:** Click “Start” next to the ‘Shelter (Individual Room) Placement Criteria’



Assessments	LINK FROM ASSESSMENTS
Family Housing Prioritization Assessment	START
Family Housing Problem-Solving Assessment	START
Shelter (Individual Room) Placement Criteria	START

### Step 3: Begin filling out the 'Shelter Placement Criteria'

Note: If the family is currently residing in an unsheltered location, they will need to be verified as unsheltered to be eligible for placement at Hamilton Family Congregate Beds. To get them on a list to be verified, activate the "Does this family need to be verified unsheltered?" toggle in their 'Shelter Placement Criteria'.


Date
09/02/2020

Does this family need to be verified unsheltered?
☒

Has this family been verified unsheltered by SFHOT or Access Point Outreach Teams?
☐


Has this unsheltered family visited or engaged the Access Point?
☒

**Step 4:** Complete the 'Shelter Placement Criteria' indicating how many clients in the Household are in need of shelter. Once complete, select "Save" at the bottom of the assessment.

Family Status	Adult with physical and legal custody of minor child(ren)	
How many people do you have in your immediate family that are in need of housing?	2	
How many of those individuals are under the age of 18?	1	
Head of household age?	24	
Family member #2's age?	3	
Are you pregnant or is any household member pregnant?	No	

**Step 4:** Once the family has been verified as unsheltered, the 'Shelter Placement Criteria', should be referred to the Family Shelter and TH queues at the same time. Families do not need to have Housing Referral Status to be referred to the TH or shelter queues.

PROGRAM ELIGIBILITY DETERMINATION



☒ Family Shelter Community Queue

☒ Family Transitional Housing Queue

REFER DIRECTLY TO COMMUNITY QUEUES

Send to Queues

Family Shelter Community Queue

Referred Program

Community Queue

Referred to Agency

Community Queue

Referring Agency

[TRAINING] San Francisco Family Coordinated Entry Agency

Private

☐

B
I
≡
≡

Referral Note

SEND REFERRAL

CANCEL

**Step 5:** If a family already has a completed 'Shelter Placement Criteria', it can be referred to the Family Shelter and TH CQs by selecting "Eligibility" next to the most recent 'Shelter Placement Criteria' assessment on the client's Assessment tab.

ASSESSMENT HISTORY			
Assessment Name	Completed	Details	
Demo version of Shelter (Individual Room) Placement Criteria [TRAINING] San Francisco Family Coordinated Entry Agency ⓘ	09/02/2020		≡ ELIGIBILITY

PROGRAM ELIGIBILITY DETERMINATION

Family Shelter Community Queue

Family Transitional Housing Queue

REFER DIRECTLY TO COMMUNITY QUEUES

### **Entering the Family’s Location and Contact Information**

Entering the family’s location will assist outreach teams in finding the family to verify that they are unsheltered. Adding current contact information will also aid in the location efforts.

**Step 1:** Click the “Location” tab. Complete the necessary fields. *Note: location Name, Address (line 1), and City are required fields.*

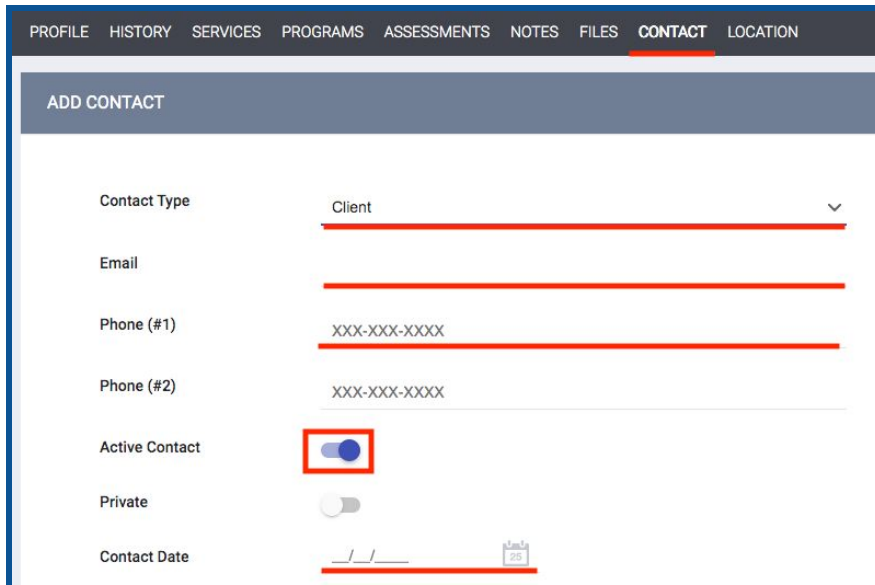
PROFILE
HISTORY
SERVICES
PROGRAMS
ASSESSMENTS
NOTES
FILES
LOCATION

⚠ Changes have not been saved. Please correct your entry and try again.

CLIENT LOCATION

Address Type	Home	▼	
Name	<input style="width: 90%;" type="text"/>	📄	←
Address (line 1)	<input style="width: 90%;" type="text"/>		←
Address (line 2)	<input style="width: 90%;" type="text"/>		
City	<input style="width: 90%;" type="text"/>		←
State	CA - California	▼	

**Step 2:** Switch to the “Contact” tab and enter the family’s current contact information.



ADD CONTACT

Contact Type: Client

Email:

Phone (#1): XXX-XXX-XXXX

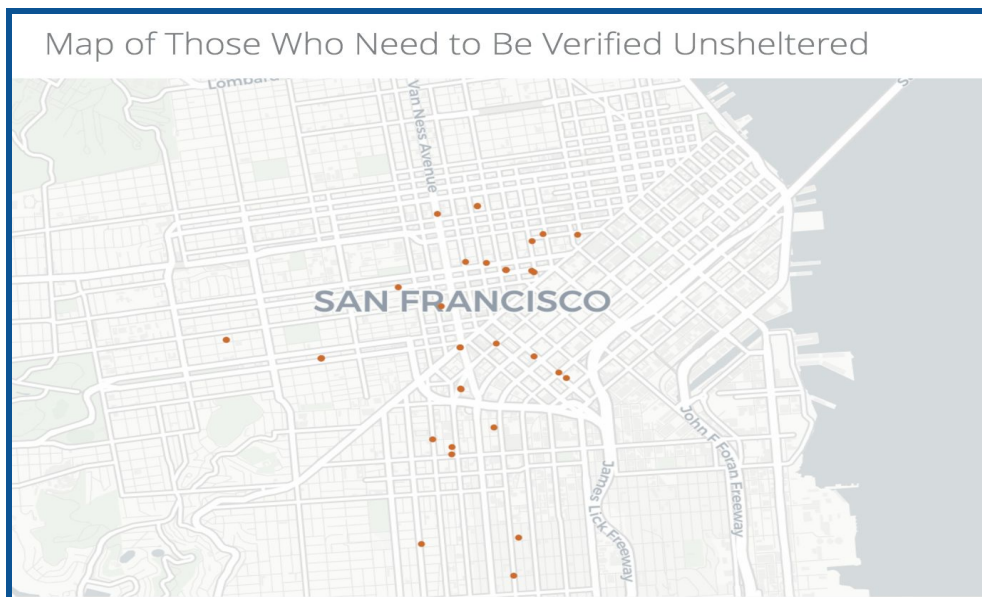
Phone (#2): XXX-XXX-XXXX

Active Contact: ☒

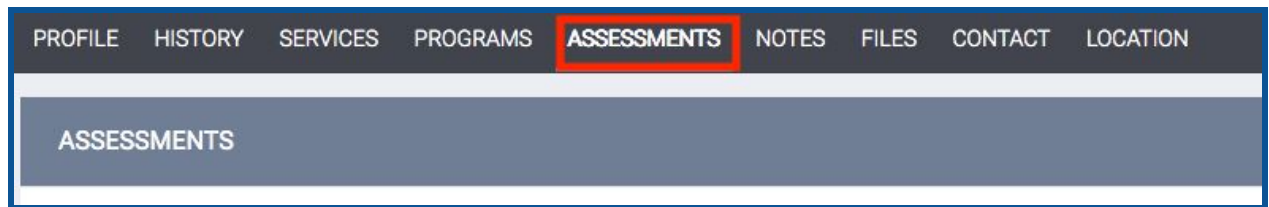
Private: ☐

Contact Date:

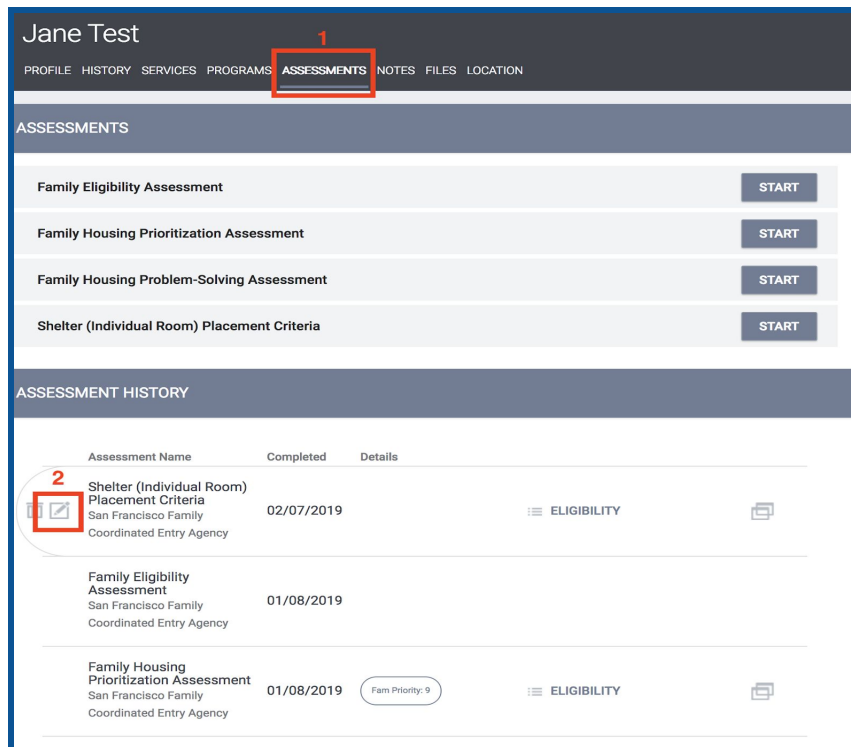
**Step 3:** The family's location will now show on the "Families Who Need to Be Verified Unsheltered for Individual Shelter Room Placement" dashboard. The AP Mobile Outreach Teams will be responsible for verifying that a family is unsheltered. Their contact and location info can be identified by selecting the client on the Map or by using the tables on the bottom of the dashboard.



**Step 4:** Once the outreach team locates the family, they will indicate the family is unsheltered using the 'verified unsheltered toggle' in the 'Shelter Placement Criteria'. Click on the Head of Household's "Assessment" tab.

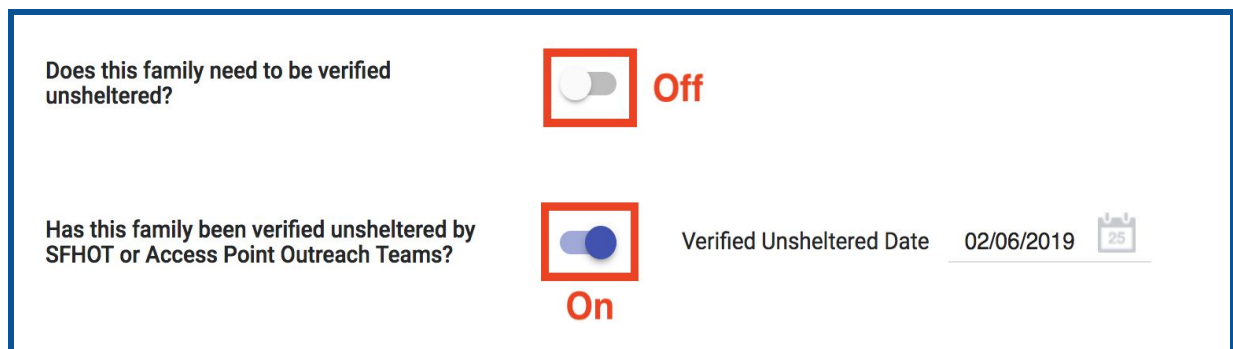


**Step 5:** Scroll down to “Assessment History”. Click the edit button to the right of the ‘Shelter (Individual Room) Placement Criteria’ assessment.



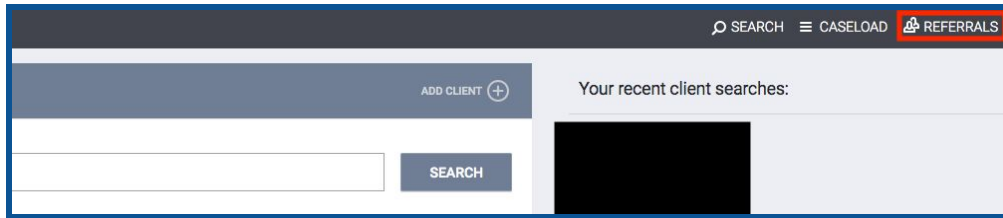
**Step 6:** Toggle on the “Has this family been verified unsheltered by SFHOT or Access Point Outreach Teams” and enter the date the family was verified unsheltered.

**Step 7:** Toggle off the “Does this family need to be verified unsheltered”.

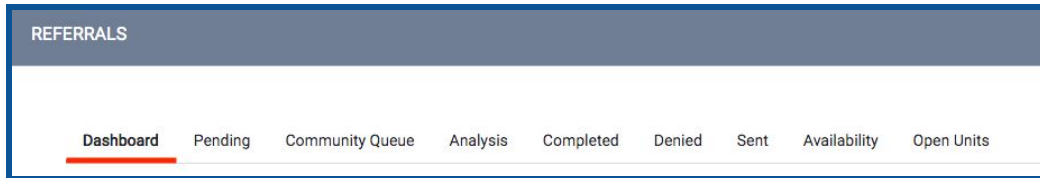


## Viewing the Individual Shelter Room Placement List

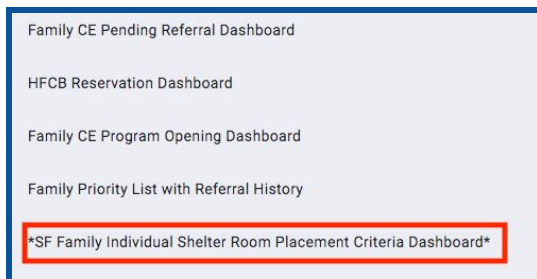
**Step 1:** Navigate to the “Referrals” tab.



**Step 2:** Click the “Dashboard” tab and a list of the available dashboards will load on the right.



**Step 3:** Select the “\*SF Family Individual Shelter Placement Criteria Dashboard\*” which is located near the bottom of the list and it will load on that page.



**Step 4:** View the “Individual Shelter Room Placement List” and scroll to the right to view the green columns. The family with the greatest amount of time in the “Calculated Length of Time in Shelter or Verified Unsheltered” column is the next in line for an Individual Room Shelter.

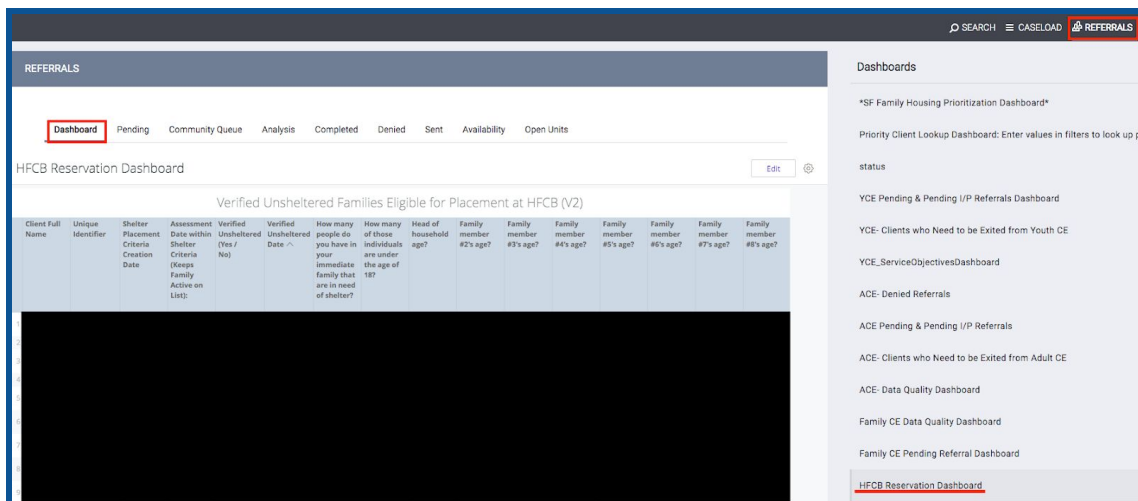
HoH Name	HoH Unique Identifier	Shelter Placement Criteria Creation Date	Assessment Date within Shelter Criteria (Keeps Family Active on List):	Verified Unsheltered (Yes / No)	Verified Unsheltered Date	How many people do you have in your immediate family that are in need of shelter?	How many of those individuals are under the age of 18?	Are you or another family member pregnant?	When is the due date?	Head of household age?	Family Members #2-#10's Age	Denial of Service Count	Total Time in Shelter or Verified Unsheltered ✓
		2020-08-17	2020-08-17	Yes	2020-08-17	3	2	No	⊗	40	12,8,.....	0	554.6
		2020-06-26	2020-06-26	No	⊗	2	1	No	⊗	32	0,.....	0	55.0
		2020-08-17	2020-08-17	Yes	2020-06-05	3	1	No	⊗	21	22,5,.....	0	31.0
		2020-09-14	2020-06-25	No	⊗	2	1	No	⊗	28	1,.....	0	14.2
		2020-09-15	2020-09-15	No	⊗	3	2	Yes	2021-01-27	26	3,6,.....	0	13.0



## Scheduling Intake Appointments

In order for a family to qualify for Hamilton Family Congregate Beds (HFCB), they first need to be verified as unsheltered in their most recent 'Shelter Placement Criteria'.

**Step 1:** Verified Unsheltered Families eligible for HFCB can be located on the “HFCB Reservation Dashboard”. Families who have been verified as unsheltered the longest will be at the top of the list and should be prioritized for placement at HFCB.



**Step 2:** Before reserving beds for a family at HFCB, you will need to verify that they have not been “Denied Service” by that agency. On the ‘Verified Unsheltered list’, check to see if the head of household has a ‘Denial of Service’ in the first orange column on the right of the table. If they do have a denial of service, scroll down to the ‘Active Denial of Service Summary Look’, find the client, and make sure that their denial was not at Hamilton Families. If it was, they cannot stay at HFCB.

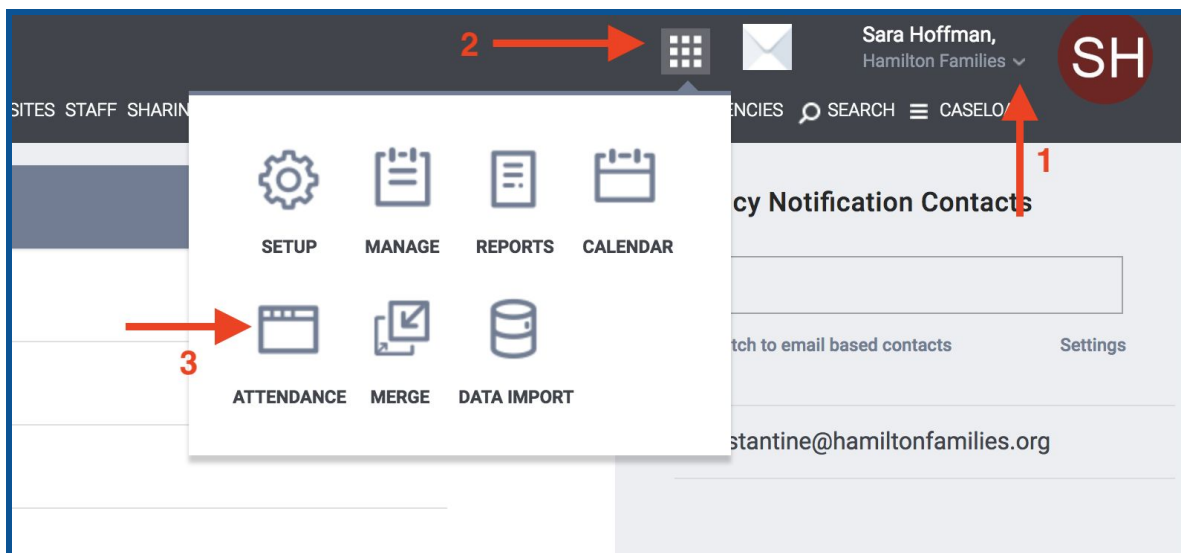
Days Since Taking Shelter Criteria	Denial of Service Count
------------------------------------	-------------------------

Active Denial of Service Summary										
Client Name	Unique Identifier	Agency Denying Service	Denial of Service Reason	DoS Hearing Requested Date	DoS Hearing Outcome	DoS Arbitration Date:	DoS Arbitration Outcome	DoS Count at this Agency	Latest DoS Start Date	Latest DoS Expiration Date
		Catholic Charities CYO	No DoS Recorded					0		
		Hamilton Families	No DoS Recorded	2020-06-11				0		
		Catholic Charities CYO	No DoS Recorded					0		
		Catholic Charities CYO	No DoS Recorded					0		
		Hamilton Families	No DoS Recorded	2020-06-11				0		
		Compass Family Services	Multiple Denial of Service Reasons					1		
		Catholic Charities CYO	No DoS Recorded					0		
		Hamilton Families	No DoS Recorded	2020-06-11				0		

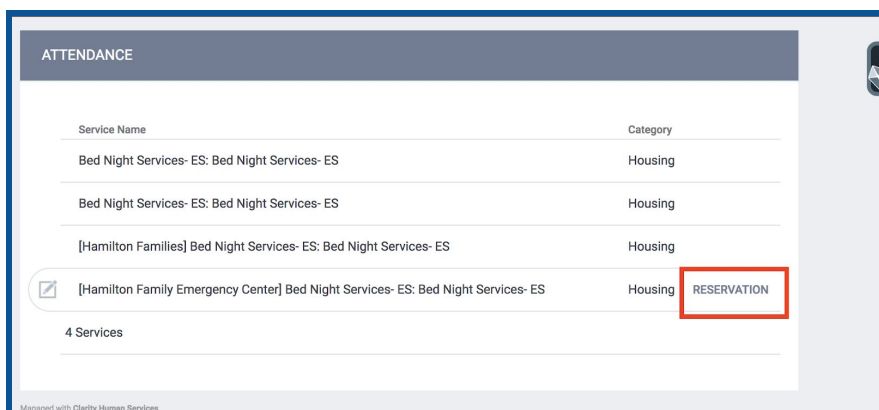
**Step 3:** If the prioritized family does not have a denial of service, the APs need to review the current bed openings at Hamilton Family Congregate Bed (HFCB) in the attendance tool and find the next opening available that fits the family’s size and age demographics. To do this:



- Switch to the “Hamilton Families” agency in ONE by clicking the drop down arrow underneath your name and selecting the correct agency.
- Click the “Launchpad” icon and then click “Attendance”.



**Step 4:** Click “Reservation” for the “[Hamilton Family Emergency Center] Bed Night Service”.



**Step 5:** When in the Reservation/Attendance tool, you will see various colored boxes. Each color indicates the following status:

- Blue indicates a reserved bed,
- Orange indicates a reserved bed where the person was marked “Present” for that particular day
- Red indicates a reserved bed where the person was marked as a “No Show”
- White indicates an unreserved bed.

*Note: Children must be six years of age to sleep alone in a top bunk and must be under the age of five to sleep in a bottom bunk with their parents. Ten cribs are available to be reserved at the bottom of the attendance page.*

Monday, May 7th, 2018 Date: 05/07/2018

Room 401 (Beds 1-4): Children must be at least 6yrs old to sleep in top bunk

Slot	Client	Last 4 SSN	Date	Status
1 (Top)	Grape Vine	4523	04/07/1978	PENDING
2 (Bottom)	Andrew Roarty	9272	08/24/1974	RESERVED
3 (Top)	Annabel Test	0000	10/14/1927	NO SHOW

Child will sleep with adult Room 401 (Beds 1-4)

Slot	Client	Last 4 SSN	Date	Status
2 (Bottom)	Atticus Finch	5643	01/01/1945	PENDING

Slot: 4 - 4 (Bottom)  
 Check-in Date: May 7, 2018  
 Days to Reserve: 60  
 Client: SEARCH FOR CLIENT

CALENDAR VIEW

**Step 6:** Select the client you want to reserve a placement for then click “Preview reservation”.




**MAKE RESERVATION**

Slot: 4 - 4 (Bottom)  
 Check-in Date: May 7, 2018  
 Days to Reserve: 60  
 Client: Johnny Test Test 1

CHANGE

PREVIEW RESERVATION

**Step 7:** Scroll to the bottom page and click “Confirm”. *Note: APs should reserve the bed for five days and HFCB will update the reservation to the 60 day when they complete the client's intake.*

Jul 3, 2018	4 (Bottom) ▼	
Jul 4, 2018	4 (Bottom) ▼	
Jul 5, 2018	4 (Bottom) ▼	

CONFIRM

**Step 8:** Once a bed has been reserved, the APs will need to schedule an intake appointment for the family with HFCB. The intake appointment must occur prior to their bed reservation and must be scheduled at least 2 hours before the intake appointment time. APs can only schedule three intake appointments with Hamilton Families a day at the following set times:

- 10:00 AM
- 2:00 PM
- 5:00 PM

The first step in scheduling an appointment is to review the “Daily Count of Appointments Scheduled with HFCB by viewing the Appointment Time” Look (Below the

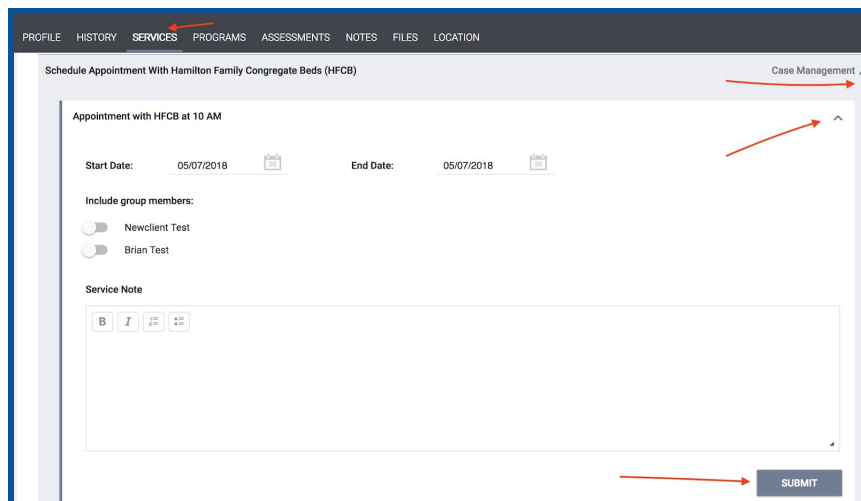
‘Verified Unsheltered’ Look on the “HFCB Reservation Dashboard”) to see when the next available intake appointment is.

Daily Count of Appointments Scheduled with HFCB by Appointment Time					just now
Appointment Time: >	Appointment with HFCB at 10 AM	Appointment with HFCB at 2 PM	Appointment with HFCB at 5 PM	Total	
Appointment Date ^	Count of Scheduled Appointments	Count of Scheduled Appointments	Count of Scheduled Appointments	Count of Scheduled Appointments	
2018-05-06	0	0	0	0	
2018-05-07	1	0	0	1	
2018-05-08	0	1	0	1	
2018-05-11	0	0	1	1	

HFCB receives emails everyday at 8 AM, 12 PM, and 3 PM communicating what upcoming intake appointments have been scheduled. This is why it is a necessity that the intake appointments are scheduled at least 2 hrs before the appointment time.

**Step 9:** Once an open intake appointment time slot has been identified, click the “Services” tab in the client’s file to schedule the appointment.

**Step 10:** Click “Schedule Appointment With Hamilton Family Congregate Beds (HFCB)” service, select the appropriate time, and set the date of the appointment. Click “Submit”.



**Step 11:** That appointment will be reflected in the “Daily Count of Appointments” Look as well as the “Clients with HFCB Intake Appointment” Look located on the “HFCB Reservation Dashboard”. The following Looks are emailed to HFCB 3 times a day.

Daily Count of Appointments Scheduled with HFCB by Appointment Time

Appointment Time: >	Appointment with HFCB at 10 AM		Appointment with HFCB at 2 PM		Appointment with HFCB at 5 PM		Total
Appointment Date ^	Count of Scheduled Appointments		Count of Scheduled Appointments		Count of Scheduled Appointments		Count of Scheduled Appointments
2018-05-07		2		0		0	2
2018-05-08		0		1		1	2
2018-05-11		0		0		1	1

Clients with HFCB Intake Appointment

HoH Name	HoH Unique Identifier	Shelter Placement Criteria Date	Verified Unsheltered?	Verified Unsheltered Date	How many people in the household are in need of Shelter?	How many children?	Are you or another family member pregnant?	Has it been classified as a high risk Pregnancy?	When is the due date?	Most Recent Appointment Date v	Most Recent Appointment Time with HFCB
Test Test	5814AE06E	2018-04-20	Yes	2018-04-27	4	2	No	0	0	2018-05-11	Appointment with HFCB at 5 PM
Test McTesty	997C9DF44	2018-05-08	Yes	2018-05-08	3	2	No	0	0	2018-05-08	Appointment with HFCB at 5 PM

**Step 12:** With the Hamilton Families agency, HFCB staff will indicate if the family shows up for their scheduled intake appointment. To do this, they navigate to the “Service” tab and select the “Family Appointment Attendance Tracking” service.

Family appointment attendance tracking
Case Management ^

Family attended scheduled intake
Family did not attend scheduled intake appointment
Family never showed at HFCB in the 24 hrs after scheduled appointment

**Step 13:** If a family does not show for their appointment within 24 hrs, they should be removed from the “HFCB Verified Unsheltered list”. To do this click the “Assessment” tab. Scroll down to “Assessment History”.

**Step 14:** Click edit to the right of the families most recent “Shelter (Individual room) Placement Criteria” Assessment.

Jane Test
1
ASSESSMENTS

ASSESSMENTS

Family Eligibility Assessment START
Family Housing Prioritization Assessment START
Family Housing Problem-Solving Assessment START
Shelter (Individual Room) Placement Criteria START

ASSESSMENT HISTORY

2
Shelter (Individual Room) Placement Criteria
San Francisco Family
Coordinated Entry Agency
02/07/2019
ELIGIBILITY

Family Eligibility Assessment
San Francisco Family
Coordinated Entry Agency
01/08/2019

Family Housing Prioritization Assessment
San Francisco Family
Coordinated Entry Agency
01/08/2019
Family Priority 9
ELIGIBILITY

**Step 15:** Click the toggle to indicate that yes “Remove Family from the Hamilton Family Congregate Bed Placement List”. Then indicate why the family was removed from the ‘Verified Unsheltered’ List. If they ever need to be added back to the ‘Verified Unsheltered’ list, the toggle can be deactivated.

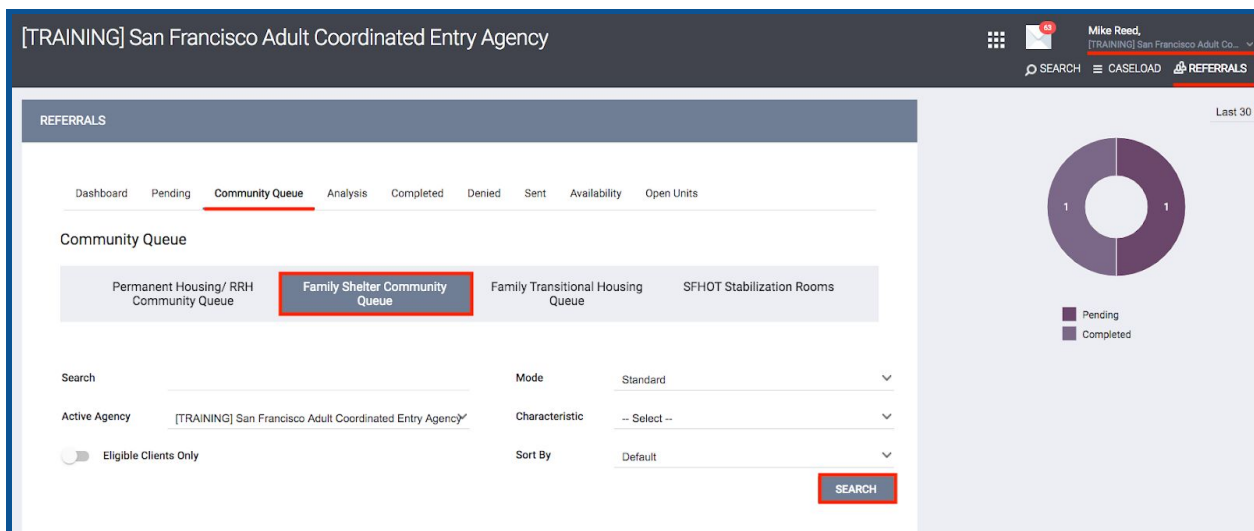
Remove Family from Hamilton Family Congregate Bed Placement List (blue means remove):
☒

Why was family removed from HFCB verified unsheltered list?

Family did not show up for HFCB intake

### Referring to Individual Room Shelters

All families on the ‘Family Shelter Community Queue’ are eligible for placement in an Individual Room Shelter. APs can see everyone who is on the Family Shelter Queue by navigating to Referrals→ Community Queue→ Family Shelter Community Queue



[TRAINING] San Francisco Adult Coordinated Entry Agency

Mike Reed, [TRAINING] San Francisco Adult Co...  
SEARCH CASELOAD REFERRALS

REFERRALS

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

Community Queue

Permanent Housing/ RRH Community Queue **Family Shelter Community Queue** Family Transitional Housing Queue SFHOT Stabilization Rooms

Search Mode Standard

Active Agency [TRAINING] San Francisco Adult Coordinated Entry Agency Characteristic -- Select --

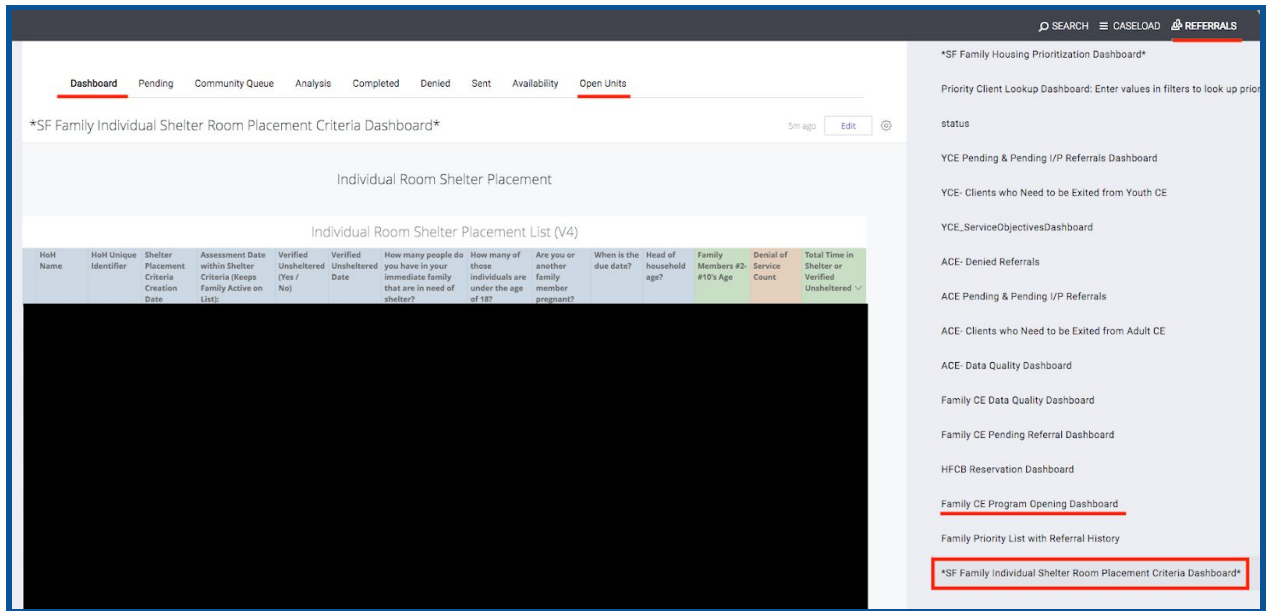
☐ Eligible Clients Only Sort By Default

SEARCH

Last 30 c

1 Pending 1 Completed

**Step 1:** Identify an open Individual Shelter Room to fill using either the “Open Units” tab or the “Current Family CE Shelter Program Openings” Look on the “\*SF Family Individual Shelter Room Placement Criteria Dashboard\*”



The screenshot shows a web application interface. At the top, there's a navigation bar with 'SEARCH', 'CASELOAD', and 'REFERRALS'. Below it, a tabbed interface includes 'Dashboard', 'Pending', 'Community Queue', 'Analysis', 'Completed', 'Denied', 'Sent', 'Availability', and 'Open Units'. The main content area is titled '\*SF Family Individual Shelter Room Placement Criteria Dashboard\*' and features a table titled 'Individual Room Shelter Placement List (V4)'. The table has columns for 'Holt Name', 'Holt Unique Identifier', 'Shelter Placement Criteria Creation Date', 'Assessment Date within Shelter Criteria (Keeps Family Active on List)', 'Verified Unsheltered (Yes / No)', 'Verified Unsheltered Date', 'How many people do you have in your immediate family that are in need of shelter?', 'How many of those individuals are under the age of 18?', 'Are you or another family member pregnant?', 'When is the due date?', 'Head of household age?', 'Family Members #2: #10's Age', 'Denial of Service Count', and 'Total Time in Shelter or Verified Unsheltered'. The table body is mostly blacked out. On the right sidebar, there's a list of links including '\*SF Family Housing Prioritization Dashboard\*', 'Priority Client Lookup Dashboard', 'YCE Pending & Pending I/P Referrals Dashboard', 'YCE: Clients who Need to be Exited from Youth CE', 'YCE\_ServiceObjectivesDashboard', 'ACE: Denied Referrals', 'ACE Pending & Pending I/P Referrals', 'ACE: Clients who Need to be Exited from Adult CE', 'ACE: Data Quality Dashboard', 'Family CE Data Quality Dashboard', 'Family CE Pending Referral Dashboard', 'HFCB Reservation Dashboard', 'Family CE Program Opening Dashboard' (highlighted with a red box), and 'Family Priority List with Referral History'. At the bottom of the sidebar, '\*SF Family Individual Shelter Room Placement Criteria Dashboard\*' is also highlighted with a red box.

**Step 2:** The Current Family CE Shelter Program Openings Look summarizes all available shelter openings. When an AP staff decides to take responsibility for filling an opening they need to claim that opening which is captured in the far right column of the program opening Look. If no AP staff member name is present, then that opening has not yet been claimed.

Agency	Program	Project Type	Program Description	Unit Number	Program Opening Description	Program Opening Date	User Updating	Access Point Staff Responsible for Filling Opening
1 Raphael House	Residential Shelter Program	Emergency Shelter	[ Target Population: Families ] [ Staff Languages: English, Spanish, Use CyraCom for translating, but request basic understanding of English ] [ Max Length of Stay: Extensions possible up to 12 months ] [ Application Process: Yes ] [ Interview Process: Yes ] [ Min Age Req: HoH w/ Children have to be 18yrs or older ] [ Max Age Req: Children in Families have to be less than 18yrs old ] [ Max Income Allowed: 50% AMI ] [ Min Rent: No ] [ Background Check: Sex Offender Registry only, Program ineligible if adverse: 290 ] [ Required Programs: Case Management, Employment, Financial Literacy, Job Readiness, Savings Plan, Other ] [ Disability Accessibility: Wheelchair Accessible, No braille signs, and No strobe-light alarm clock, fire alarms, or on public doors ] [ Building Accessibility: "Yes for physical, mental, and other disabilities. Case-by-case based on available rooms" ] [ Pets: No, only service and companion animals w/ documentation ]			2020-09-10		

**Step 3:** To claim responsibility for a program opening, the AP staff need to switch to the agency that posted the opening, navigate to the Referrals→ Availability tab, edit the available opening, and enter the name of the AP staff under the “Access Point Staff responsible for filling opening”.

Raphael House

SEARCH

CASELOAD

REFERRALS

Mike Reed  
Raphael House

REFERRALS

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

Program Availability

Residential Shelter Program
FULL AVAILABILITY LIMITED AVAILABILITY NO AVAILABILITY

1
2

Completed  
Denied

Last 30 d

Residential Shelter Program
FULL AVAILABILITY LIMITED AVAILABILITY NO AVAILABILITY

AVAILABLE OPENINGS

Unit Size (# of bedrooms) : 1  
Minimum Household Size (min. # of ppl) : 1  
Maximum Household Size (max. # of ppl) : 2  
What floor is the unit on? : 2  
Does the building have an elevator? : Yes  
Does the building have stairs? : Yes  
Sub-Population: Veteran : No  
Sub-Population: Adult : No  
Sub-Population: Youth : No  
Sub-Population: Family : Yes  
5 more fields

RESERVED OPENINGS

Opening	Client	Referred Date
		07/30/2020

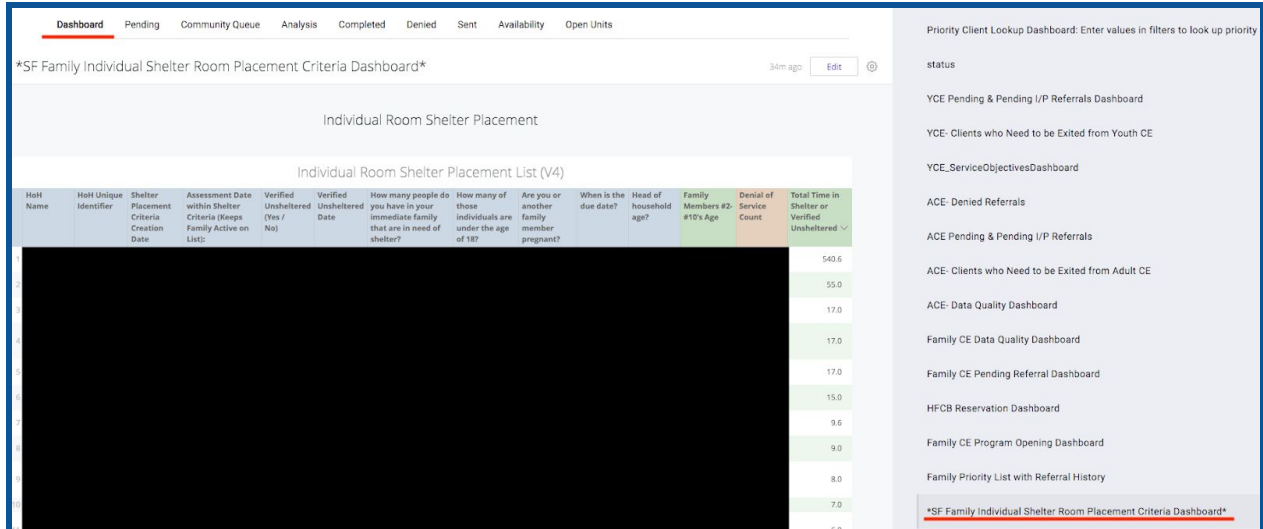
ADD SINGLE OPENING
ADD MULTIPLE OPENINGS

Does the building have an elevator? ☒
Does the building have stairs? ☒
Sub-Population: Veteran ☐
Sub-Population: Adult ☐
Sub-Population: Youth ☐
Sub-Population: Family ☒
ADA Unit ☐
HDAP ☐
HAT Referral ☐
MHSA ☐
Access Point Staff Responsible for Filling Opening (Field for AP use only) 

SAVE CHANGES
CANCEL



**Step 4:** Now that the AP staff member has claimed responsibility for the opening, they need to identify the highest priority family to refer to that opening. Families are Prioritized by the far right column “Total Time in Shelter or Verified Unsheltered” on the “Individual Room Shelter Placement List”. Identify the highest priority family that fits the specifications of the posted unit.



**Individual Room Shelter Placement List (V4)**

HoH Name	HoH Unique Identifier	Shelter Placement Criteria (Deep Family Active on List)	Assessment Date within Shelter Criteria (Deep Family Active on List)	Verified Unsheltered (Yes/No)	Verified Unsheltered Date	How many people do you have in your immediate family that are in need of shelter?	How many of those individuals are under the age of 18?	Are you or another family member pregnant?	When is the due date?	Head of household age?	Family Members #2-#10's Age	Denial of Service Count	Total Time in Shelter or Verified Unsheltered
													540.6
													55.0
													17.0
													17.0
													17.0
													15.0
													9.6
													9.0
													8.0
													7.0
													6.0

**Active Denial of Service Summary**

Client Name	Unique Identifier	Agency Denying Service	Denial of Service Reason	DoS Hearing Requested Date	DoS Hearing Outcome	DoS Arbitration Date:	DoS Arbitration Outcome	DoS Count at this Agency	Latest DoS Start Date	Latest DoS Expiration Date

**Step 5:** Review the orange “Denial of Service” column to see if the client has any documented denial of services. If they do, scroll down to the “Active Denial of Service Summary” Look on the same dashboard. Locate the client and verify that their denial of service was not at the agency to which they are being referred. If they have a denial of service at the applicable agency, they cannot be referred there.

**Active Denial of Service Summary**

Client Name	Unique Identifier	Agency Denying Service	Denial of Service Reason	DoS Hearing Requested Date	DoS Hearing Outcome	DoS Arbitration Date:	DoS Arbitration Outcome	DoS Count at this Agency	Latest DoS Start Date	Latest DoS Expiration Date

**Step 6:** The Matchmaking process for individual room shelter will be performed through the Family Shelter Queue. Navigate to the queue and perform the following steps:

- Enter the client’s name or unique identifier
- **Active Agency= the agency you are referring to**
- Search

Permanent Housing/ RRH Community Queue
Family Shelter Community Queue
Family Transitional Housing Queue
SFHOT Stabilization Rooms

Search
Rose Bush
Search for client name

Mode
Standard

Active Agency
[TRAINING] Providence Foundation


Characteristic
-- Select --

Eligible Clients Only


Sort By
Default

SEARCH

Client	Referral Date	Days Pending
Rose Bush Referred by: [TRAINING] San Francisco Family Coordinated Entry Agency ⓘ	08/13/2020	59



**Step 7:** The AP staff can click into the client's referral on the queue by clicking the edit symbol next to the clients name. Within the referral they can assign themselves as the "Navigator", so that the client appears in their "Caseload".

Client	Referral Date	Days Pending
Onyx Test Referred by: [TRAINING] San Francisco Family Coordinated Entry Agency ⓘ	06/02/2020	104
 Bob Uncle Referred by: [TRAINING] San Francisco Family Coordinated Entry Agency ⓘ	07/29/2020	47
Rose Bush Referred by: [TRAINING] San Francisco Family Coordinated Entry Agency ⓘ	08/13/2020	32

REFERRAL: ASSIGN

Client	Bob Uncle
Referred to	Community Queue - Family Shelter Community Queue
Referring Agency	[TRAINING] San Francisco Family Coordinated Entry Agency
Referred Date	07/29/2020 3:02 PM
Days Pending	36 day(s)
Qualified	Yes
Family Shelter score	1
Last Activity	08/20/2020 <span>CHECK-IN</span>
Referred by Staff	Jon Hoskins ⓘ
Navigator	<span>ASSIGN NAVIGATOR</span>

**Step 8:** The AP can then “Re-assign” the referral to the specific posted program opening that they are attempting to fill.

RE-ASSIGN

Program	-- Select Program -- ✓ Residential Shelter Program	←
Opening	09/10/2020 Joanna Garcia. Phone ir✓	←
		<span>SAVE CHANGES</span> <span>CANCEL</span>

**Step 9:** The referred-to agency/program will receive a notification about the Pending Referral and will begin working with the client. If for any reason the client cannot be placed in the open unit, the referred-to program will deny the referral and send it back to the queue where the family will again be ready for matching. If the family moved out of the area or are no longer in need of shelter, the program will indicate that as part of the denial and has the choice to not send the client back to the community queue.

**Step 10:** Once a family has been successfully enrolled in an individual room shelter or TH program, they need to be removed from the other queue. On the \*SF Family Individual Shelter Room Placement Criteria Dashboard\*, there is a look called ‘Clients to be Removed from the TH or ES Queues’. This captures all clients that need to be

removed from either the family shelter or transitional housing queues due to an enrollment in the other project type.

Clients to be Removed from the TH or ES Queues					
Client Full Name	Unique Identifier	Assessment Name	Assessment Date ▾	Remove From TH Queue	Remove From ES Queue