

PROBLEM SOLVING

ONE SYSTEM TRAINING

MAY 2023



AGENDA

Switching Agencies & Joint Problem Solving-Coordinated Entry Enrollment

Current Living Situation

Problem Solving Screening

Problem Solving Events

Problem Solving Conversation

Problem Solving Services

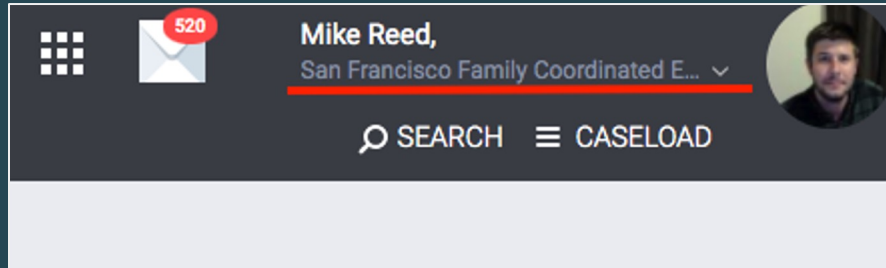
Resolutions

Uploading Files

Joint Problem Solving/Coordinated Entry Exits

Navigating ONE

- For Access Points: Problem Solving work should be done under the San Francisco Coordinated Entry Agencies
- For Family Shelters: Problem Solving work should be done under the agency you work





Joint Problem Solving-Coordinated Entry Enrollment

Problem Solving/CE Enrollments

Joint enrollment- Program names will remain the same in ONE.



Household seeking services must meet criteria under Homeless Status, Connection to San Francisco, and Household Type.



Access Point and Access Point partners can enroll eligible households in Access Point programs under the Coordinated Entry Agency.

Problem Solving/CE Enrollments

To enroll a household:

1. Go to HoH profile
2. Select the Programs tab
3. Scroll down to 'Programs: Available' section
4. Select desired program for household enrollment

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

Mission Access Point Coordinated Entry [TRAINING] San Francisco Family Coordinated Entry Agency ⓘ	09/30/2020	Active	Individual
Plaza - LOSP PH - Permanent Supportive Housing (disability required) [TRAINING] Conard House ⓘ	09/23/2020	09/26/2020	Individual
Plaza - HUD VASH PBV PH - Permanent Supportive Housing (disability required) [TRAINING] Conard House ⓘ	09/23/2020	09/23/2020	Individual

PROGRAMS: AVAILABLE

ECS: 440 Turk Access Point	Enroll into the access point program where you work	▼
ECS: Access Partner- Psychiatric Emergency Services		▼
ECS: Access Partner- SFHOT		▼
ECS: Bayview Access Point		▼
ECS: Mobile Access Point		▼
ECS: SOMA Access Point		▼
Housing Stabilization		▼


Problem Solving/CE Enrollments (cont)

6. For households of 2 or more, be sure to 'Include group members' by toggling on the appropriate members
7. Click 'Enroll'

PROGRAMS: AVAILABLE

Bayview Access Point

Central City Access Point

 **Funding Source**
N/A

Availability
Full Availability

Service Categories:

- ✓ No Category
- ✓ Case Management
- ✓ Other
- ✓ Financial
- ✓ Transportation
- ✓ RETIRED (Coordinated Entry Event)
- ✓ RETIRED (Outreach Contact)
- ✓ Housing Search and Placement

Include group members:

☒ Samuel Test

PRINT DIRECTIONS


ENROLL

Problem Solving/CE Enrollments (cont)

Information may auto-populate from a previous enrollment.

- Make sure the information is up to date.

Complete all fields; avoid using “Data not Collected,” “Client Doesn’t know,” or “Client Refused” when possible.

Program Entry Date	10/01/2020	
PRIOR LIVING SITUATION		
Type of Residence	Psychiatric hospital or other psychiatric facility	
Length of Stay in Prior Living Situation	One month or more, but less than 90 days	
Length of Stay Less Than 90 Days	Yes	
On the night before - stayed on the streets, ES or Safe Haven	No	
DISABLING CONDITIONS AND BARRIERS		
Disabling Condition	Yes	
Physical Disability	No	
Developmental Disability	No	
Chronic Health Condition	Yes	Long Term Yes
HIV - AIDS	No	
Mental Health Problem	Yes	Long Term Yes
Substance Abuse Problem	No	
Domestic Violence Victim/Survivor	No	
MONTHLY INCOME AND SOURCES		

Current Living Situation

Current Living Situation Assessment

- Required as part of the 2020 HUD Coordinated Entry Data Standards.
- Used to regularly document the following:
 - The current living situation of people experiencing homelessness
 - Homeless chronicity
- Used to understand how many times a person is engaged while experiencing homelessness.



**Current Living Situation Assessment is not required for Shelters*

For CE record a Current Living Situation anytime any of the following occurs:

Project Start

Project start is the enrollment into CE.

A CE Assessment or CE Event is recorded


The CE Assessment is the Family or Adult Primary Assessment. CE Events are services that are categorized as a CE Event.

The client's living situation changes

If the client's living situation has changed since their last engagement.

Current Living Situation Assessment

The screenshot shows the Bitfocus web application interface. At the top, a navigation bar contains the following links: PROFILE, HISTORY, SERVICES, **PROGRAMS**, NOTES, FILES, CONTACT, LOCATION, REFERRALS, and ASSESSMENTS. The 'PROGRAMS' link is highlighted with a red box. Below the navigation bar, the 'PROGRAM HISTORY' section displays a table of programs. The first row is for 'ECS: Bayview Access Point' with a trash icon in a red box. The table columns are Program Name, Start Date, End Date, and Type. The program is listed as '[TRAINING] San Francisco Adult Coordinated Entry Agency' with a start date of 10/07/2019, an 'Active' status, and an 'Individual' type. Below the table, the 'PROGRAM: ECS: BAYVIEW ACCESS POINT' section is shown. It has a sub-navigation bar with links: Enrollment, History, Provide Services, **Assessments**, Notes, Files, and Forms. The 'Assessments' link is highlighted with a red box. Under 'Assessments', there is a 'Current Living Situation' entry with a 'START' button highlighted by a red box. A 'LINK FROM ASSESSMENTS' label is also present.

Program Name	Start Date	End Date	Type
 ECS: Bayview Access Point [TRAINING] San Francisco Adult Coordinated Entry Agency	10/07/2019	Active	Individual

PROGRAM: ECS: BAYVIEW ACCESS POINT

Enrollment History Provide Services **Assessments** Notes Files Forms [X Exit](#)

Assessments LINK FROM ASSESSMENTS

Current Living Situation **START**

Within a program enrollment

1. Click on Assessments Tab
2. Click to START a Current Living Situation Assessment
3. Select household members for whom you'd like to complete the CLS Assessment

The screenshot shows a modal window titled 'ADD PROGRAM ASSESSMENT'. It features a toggle switch for 'Pita Pocket' which is currently turned on. Below the toggle, there is a button labeled 'ADD CURRENT LIVING SITUATION' which is highlighted with a red box. The modal also includes a close button (X) in the top right corner.

ADD PROGRAM ASSESSMENT

☒ Pita Pocket ☐ Grandchild

ADD CURRENT LIVING SITUATION

Current Living Situation Assessment

✓ "Living Situation Verified By" field should be the CE agency/program.

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 buildin

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] ECC Agency

Clarity Human Services

Current Living Situation Assessment

Add Current Living Situation for client Pita Pocket

**Additional questions may
populate based on the client's
responses**

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	<div></div>

Problem Solving Screening

Problem Solving

WHAT IS PROBLEM SOLVING?

- Prevent people from entering the HRS and to redirect people who can resolve their homelessness without the need for shelter or ongoing support.
- Problem Solving is always the first attempt to resolve someone's housing crisis and is a continuous resource.
- Problem Solving Services & Events include:
 - Problem Solving Financial Assistance
 - Problem Solving Housing Location Assistance
 - Problem Solving Conversation

Problem Solving Screening Tool


Assessments

Current Living Situation	START
Adult Primary CE Assessment	START
Problem Solving Screening Tool	START

Used to quickly identify households who may be a good fit for a Problem Solving intervention.

- Help to identify those households who may have factors that contribute to a successful Problem Solving intervention.
 - Income/income history;
 - Rental history; and
 - A support network /connections

PROBLEM SOLVING PRESCREENING QUESTIONS

Assessment Date 09/03/2020 

1. Have you ever rented a place in your name? ☐

2. WHO ARE THE PEOPLE PROVIDING SUPPORT TO YOU AT THIS TIME? (TOGGLE YES OR NO FOR EACH)

Friends, family or loved ones ☐

Former associates, landlords, roommates or colleagues ☐

Members of church or other spiritual organizations ☐

Other support networks/circles/community organizations ☐

Client Refused, Client Doesn't Know ☐

3. WHO ARE YOU INTERESTED IN CONNECTING WITH, REUNITING WITH, OR FINDING, EITHER YES OR NO FOR ALL ANSWERS BELOW)

Problem Solving Screening Tool

- Tips for completing the Problem Solving Screening Tool:
 - Answer to Assessment Level question will always be Housing Needs Assessment
 - Read the questions as written
 - Go over each option of support with the household to ensure that nothing is forgotten or missed

PROBLEM SOLVING SCREENING TOOL

PROBLEM SOLVING PRESCREENING QUESTIONS

Assessment Location

3rd Street Youth Access Point

▼

Assessment Type

In person

▼


Assessment Level

Housing Needs Assessment

▼

Assessment Date

06/15/2023



1. Have you ever rented a place in your name?

☒

If Yes, have you ever been served an official eviction notice?

No

▼

2. WHO ARE THE PEOPLE PROVIDING SUPPORT TO YOU AT THIS TIME? (TOGGLE YES OR NO FOR ALL THAT APPLY)

Friends, family, or loved ones

☒

Former associates, landlords, roommates or colleagues

☐

Members of church or other spiritual organizations

☒

Other support networks/circles/community organizations

☐

Problem Solving Screening Tool

When to complete vs update...

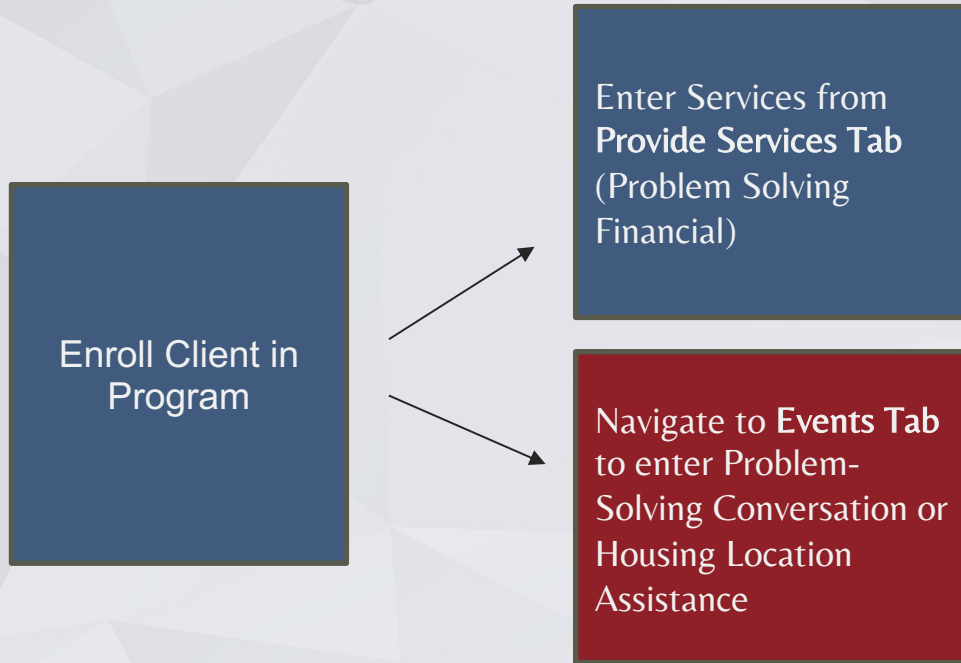
- A Problem Solving screening should be completed at each new program enrollment.
- A Problem Solving screening should be completed when there are changes to update for households who are Problem Solving status.

Please fill out a new screening each time.
Do not update an existing screening.

Problem Solving Events and Services

Problem-Solving Services and Events	Where to find them?
Problem Solving Financial	Services Tab
Problem Solving Conversation	Events Tab
Problem Solving Housing Location Assistance	Events Tab

User Workflow: Services & Events



It's likely that you'll need to navigate to both Services and Events during the course of a Problem Solving Resolution with a client.

Problem Solving Events

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



CE Events Continued

- 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

CE Events Continued

Here you will see when you select the category, the "Event" items will show in the drop-down.

Samuel Test

PROFILEHISTORYSERVICESPROGRAMSNOTESFILESCONTACTLOCATIONREFERRALSASSESSMENTS

PROGRAM: ECS: MOBILE ACCESS POINT

EnrollmentHistoryProvide ServicesEventsAssessmentsNotesFilesForms

Coordinated Entry Events

Problem Solving/Diversion/Rapid Resolution intervention or service

Problem Solving Conversation: Problem Solving Conversation

Problem Solving Housing Location Assistance: Problem Solving Housing Location Assistance

×

Exit

Problem Solving Conversations

Problem Solving Conversation

What is a Problem Solving Conversation?

- Any "housing-focused" case management conversations that was about exploring alternatives to a housing crisis outside of the Homelessness Response System.
- Problem Solving conversations explore alternative solutions to housing outside of the Homelessness Response System (i.e., beyond shelter, Navigation Centers, getting on a waitlist, or accessing PSH/RRH from HSH/another housing-specific intervention).
- Problem Solving conversations will most likely happen with only Problem Solving status households.
- In the rare event that Problem Solving services are provided to a Housing Referral Status household, do input that conversation in ONE only after you've verified that it is indeed a Problem Solving service/conversation.

Problem Solving Conversation

- An outcome should be recorded for each PS Conversation Event.
- Outcome of Conversation recorded as Yes or No in the “Result: Client Housed/Re-Housed in a Safe Alternative” field.
- There should be more than one PS Conversation recorded for households that have a resolution.
- PS Conversations should be entered within 48 hours.

Problem Solving/Diversion/Rapid Resolution intervention or service

Problem Solving Conversation: Problem Solving Conversation

Date 05/10/2023

Result: Client housed/re-housed in a safe alternative Select

Event Note:

B I 1 2 3 4 5 6 7 8 9 10

SUBMIT

Not a Problem Solving Conversation

The following do not constitute a Problem Solving Conversation:

- A conversation/interaction with a household that was more about general case management and referrals. For example:
 - Referral to a food pantry, behavioral health or any other community resources.
 - General administrative, case management duties.
- A conversation with a Housing Referral Status around housing navigation services.
- A conversation about shelter referrals or shelter information.



Notes

If staff have a significant interaction with a household that was not a Problem Solving conversation, a service should be entered (if applicable) or the interaction should be recorded under the *Notes Tab*.

PROGRAM: COORDINATED ENTRY ACCESS POINT

[Enrollment](#) [History](#) [Assessments](#) **[Notes](#)** [Files](#) [Forms](#)

Client Program Notes

Problem Solving Services

Problem Solving Services

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 ▼

Problem Solving Services

Problem Solving Financial Assistance ← **Service** **Service Items** Financial ▾

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

Contribution to rent or utility costs of another household (non lease agreements) if it will allow the participant to move into the unit or maintain/return to the unit ▾

Fees or costs (including certifications, union dues or licenses) necessary for immediate employment that will result in a housing opportunity. ▾

Furniture, such as a bed, if reasonable and directly linked to a housing resolution ▾

Grocery cards if the food assistance will allow client to obtain or maintain a housing resolution ▾

Housing application fees and credit checks if directly linked to a housing resolution ▾

Move-in assistance for housing outside the San Francisco HRS, including deposits and first and last month's rent ▾

Moving truck or moving assistance if directly linked to a housing resolution ▾

Problem Solving Financial Assistance

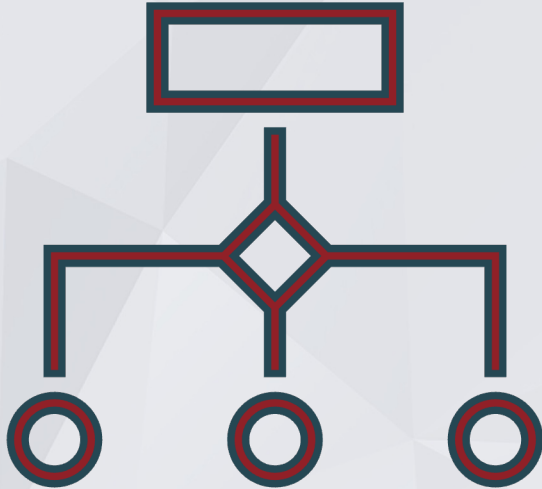
- Make sure that different financial assistance categories are captured separately.
- Ensure that funds are issued in accordance with policy limits.
 - \$2,000 if no lease
 - \$8,000 if lease/written agreement
 - Remember limits are per fiscal year. Amount easily trackable now.
- Funds should only be issued when a Problem Solving resolution is achieved!
- Start date, end date, and expense date must be the same date.
- All PS Financial Assistance should be entered within 48 hours of the final financial assistance category being issued.



PS Financial Assistance Categories

Car repair, registration, smog tests, insurance, or payment, if reasonable and directly linked to housing resolution	▼	Pest extermination, if it makes a potential place to stay habitable	▼
Contribution to rent or utility costs of another household (non lease agreements) if it will allow the participant to move into the unit or maintain/return to the unit	▼	Rental Assistance after Move-in	▼
Fees or costs (including certifications, union dues or licenses) necessary for immediate employment that will result in a housing opportunity.	▼	Transportation costs within San Francisco that will allow client to obtain or maintain a housing resolution	▼
Furniture, such as a bed, if reasonable and directly linked to a housing resolution	▼	Travel and relocation support outside of San Francisco that will result in a housing connection - airline, train or bus ticket	▼
Grocery cards if the food assistance will allow client to obtain or maintain a housing resolution	▼	Travel and relocation support outside of San Francisco that will result in a housing connection- food stipend	▼
Housing application fees and credit checks if directly linked to a housing resolution	▼	Travel and relocation support outside of San Francisco that will result in a housing connection- gas card	▼
Move-in assistance for housing outside the San Francisco HRS, including deposits and first and last month's rent	▼	Utility arrears or past due rent to a landlord or leaseholder if it will allow the participant to move back into the unit.	▼
Moving truck or moving assistance if directly linked to a housing resolution	▼	Utility bills, including deposits if directly linked to a housing resolution	▼
Other activities approved in advance through the Waiver Process (specify in Notes)	▼	Vital documents replacement costs if directly linked to a housing resolution	▼

PS Financial Assistance Categories



- When financial assistance is issued, you will have to select the category of funds issued.
- Each assistance category must be tracked separately.
 - *Note: Dates for Financial Assistance categories under the same resolution must match.*

Problem Solving Financial Assistance

- Expense amounts should be entered for financial services.
- Funding Source will default to certain types of funding, but be sure to select appropriate funding source for your agency.
- Start date, end date, result date, and expense date must be the same date.

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

Event Date: 05/10/2023

Expense Amount: 0.00 Expense Date: 05/10/2023

Funding Source: General Funds

Service Note :

B I

SUBMIT

Problem Solving Resolutions

Recording a Resolution

The screenshot displays a web form titled 'Coordinated Entry Events'. Under the heading 'Problem Solving/Diversion/Rapid Resolution intervention or service', there is a section for 'Problem Solving: Initiated Problem Solving Conversation'. This section contains the following fields:

- Date:** 11/15/2022 (with a calendar icon)
- Result: Client housed/re-housed in a safe alternative:** Yes (with a dropdown arrow)
- Result Date:** A date field with a calendar icon, currently showing a blank date.
- Event Note:** A large text area with a rich text editor toolbar (containing Bold, Italic, Link, and Unlink icons).

To record a resolution:

1. Record the Resolution as a **Problem Solving Conversation** Event and mark “Result: Client Housed/Re-Housed in a Safe Alternative = Yes”
2. Record the financial assistance given to facilitate the resolution as a **Problem Solving Financial Assistance Service**
 - Date should be the same as the PS Conversation Event Date
3. Upload any relevant/appropriate files and forms to client’s Files tab in ONE
4. Exit the client from the CE program

When to Record Conversations & Resolutions

- Problem Solving Conversations should be recorded within 48 hours of the conversation having happened.
- A Problem Solving Resolution should be recorded within 48 hours of the final Financial Assistance being issued.
 - A Problem Solving Resolution in the ONE System includes the following:
 - The Problem Solving Financial Assistance logged under CE Services
 - The Problem Solving Conversation logged under CE Events with “Result: Client housed/re-housed in a safe alternative” marked YES
 - Dates for the CE Event (conversation) and CE Service (financial assistance) MUST match exactly

Resolutions in ONE

- Example with move-in assistance:

Financial assistance for move-in issued on 08/01/2023.

PS staff logs the Financial Assistance under CE Services with date 8/1/2023.

PS staff outreaches the household to notify them that financial assistance was issued on the same day.

PS staff logs this as a PS Conversation under CE Events and ensures:

-Date: 8/1/2023

-Result: Client housed/re-housed in a safe alternative: YES

-Result: 8/1/2023

Resolutions in ONE

- Example with furniture assistance through El Corazon

Financial assistance for move-in issued 8/1/2023.

PS staff outreaches household to inform them assistance was issued.

PS staff logs this PS conversation dated 8/1/23 .

Payment to El Corazon issued on 8/10/2023 (through Fiscal Agent or internally).

PS Staff logs financial under CE Services within appropriate categories. All financial assistance services dated 8/10/2023.

PS outreaches household same day to ensure furniture was delivered.

PS staff logs this as a PS Conversation under CE Events and ensures:

-Date: 8/10/2023

-Result: Client housed/re-housed in a safe alternative: YES

-Result: 8/10/2023

Problem Solving Resolution Checklist



Problem Solving Conversation Event created with a **Result:**
Client housed/re-housed in a safe alternative=Yes with
descriptive note



Problem Solving Financial Service(s) created for each
relevant financial category documenting amount given for
the resolution and with descriptive note(s)



Dates are an exact match for **Problem Solving**
Conversation Event recording the resolution and **Problem**
Solving Financial Assistance Service recording \$\$ amounts



Files and forms relevant to the resolution are uploaded to
client's profile



Client is exited from CE or Shelter program



Uploading Files

Uploading Files

Document	When to upload
Limited Financial Assistance Request Form	For all Resolutions that accessed Problem Solving Funds (excludes those providers using Fiscal agent process)
Fiscal Agent Checklist	If using the Fiscal Agent service
Housing Resolution Plan Form	For all resolutions
Lease/Written Agreement/Intent to Rent	If appropriate for resolution
Housing Sustainability Tool	If appropriate for resolution
Housing Habitability Standards Inspection Checklist	If appropriate for resolution
Participant and Payee Agreement Forms	For all resolutions that accessed Problem-Solving Funds
Proof of Financial Assistance Expenditures	If appropriate for resolution
Problem Solving Waiver Request Form	If appropriate for resolution

All files must be uploaded to ONE as a PDF

Uploading Files

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

⚠ Release of Information is Missing or Permission Not Provided. Please review to ensure compliance.

CLIENT FILES

ADD FILE 

UPLOAD A FILE

Category

Problem Solving



Predefined Name

Fiscal Agent Checklist



File

Select File

Trouble attaching files? Switch to the Basic Uploader

Private



ADD RECORD

CANCEL

Joint Problem Solving-Coordinated Entry Exits

Joint Problem Solving-Coordinated Entry Exits

In general, a household will be exited from the CE Program in ONE when:

- Client finds a Problem Solving resolution
- Client Placed in Institutional Setting
- Death
- Denial of Service
- Exit by Client Choice
- Terminated from Program due to Eligibility
- Client is housed through the HRS (most likely for clients who are Housing Referral Status)

Clients may be also be auto-exited

Auto-Exits

Auto-exits from the CE/PS may occur if:



The household permanently housed through CE.



Any household enrolled in the PS/CE program that had no activity in ONE for 90 days.

Auto-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 client is referred to a PSH program. The client is enrolled in the program with a move-in date of 7/30/20.

Auto-Exit from CE= YES

Example 2:

The client informs their case manager they are going to live with their aunt in Oregon.

Auto-Exit from CE=NO

The client needs to be manually exited from CE.


Exits

To complete the exit, you will complete the following steps.

1

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

PROGRAM HISTORY

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

2

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

Program Exit Screen

Enrollment History Events Assessments Notes Files

× Exit

End Program for client Bitfocus Test

Program Exit Date

05/11/2023



Destination

Rental by client, no ongoing housing subsidy



Exit Reason

Housed through Problem Solving Resolution



Adult CE Program Exit Destination Note:

MONTHLY INCOME AND SOURCES

Income from Any Source

Yes



Earned Income



Amount 4000.00

Unemployment Insurance



Supplemental Security Income (SSI)



Social Security Disability Insurance (SSDI)



VA Service-Connected Disability Compensation



VA Non-Service Connected Disability Pension



Private Disability Insurance



Worker's Compensation




CalWORKS



Exit Reasons for Problem Solving

When a Problem Solving resolution has been reached and the household has found a safe, indoor place outside of the Homelessness Response System, Access Point staff will manually exit the household from the Access Point program.

- There is one exit reason that should be used for an exit due to Problem Solving:
 - Be sure to select **Housed through Problem Solving Resolution** as the Exit Reason

Program Exit Date	05/10/2023	
Destination	Rental by client, no ongoing housing subsidy	▼
Exit Reason	Housed Through Problem Solving Resolution	▼
Family CE Program Exit Destination Note:	<input type="text"/>	

Other Exit Fields

- **Program Exit Date** – date of exit.
- **Destination** – Select most appropriate exit destination.
 - Other should rarely be used.
 - Make sure Destination and Exit Reason are congruent.
 - **For Problem Solving Resolutions** – make sure that exit Destination is outside of the Homelessness Response System.
- **CE Program Exit Destination Note** – opportunity to provide more details about client's housing destination.
- **Income, Non-Cash Benefits and Health Insurance** – these fields cascade from the enrollment screen. Please update with most accurate information at time of Exit.

Note: Shelters are only required to complete Exit Destination field, Exit Reason shall be left blank.

Who is responsible for exiting?

If Housed through CE:

- Auto-exited from CE. This includes RRH and PSH.

If Housed through Problem Solving:

- Manual exit

If Death/Institutionalized/No longer Eligible/Etc.:

- Manually exited or auto-exited if no activity.

Reminders

- All Problem Solving Conversations should be entered within 48 hours.
- All Problem Solving Financial Assistance should be entered within 48 hours of the final financial assistance being issued.
- All PS Financial Assistance should be tied to *one* PS Resolution only.
- All dates should match within the same entry.
- All dates should match within the same resolution (all PS Financial Assistance, final PS Conversation).

Problem Solving Workflow

Case Example: Lily

Meet Lily

- Lily has been in San Francisco for the past four months.
- She has been looking for a job and is staying with a friend in their spare bedroom.
- Lily and her friend had an argument and Lily was forced to leave the apartment.
- Lily is now staying on the street.

- Lily came to the Youth Access Point looking for an immediate place to stay.
- PS staff completed PS screening and has initial PS Conversation.
- Lily identifies an aunt in Washington that she may be able to reconnect with.
- PS staff and Lily schedule a follow-up meeting for 7/7/2023.
- PS Conversation logged under CE Events dated 7/3/2023.

7/3/2023



- Follow-up PS Conversation between PS staff and Lily.
- PS staff support Lily in calling her aunt – aunt agrees that Lily can stay with her but would need support paying for the plane ticket.
- PS staff and Lily identify some ticket options and discuss PS Financial Assistance for a plane ticket and a gift card to cover meals during travel.
- PS staff completes required documents with Lily.
- PS staff and Lily schedule a follow-up meeting for 7/12/2023.
- PS staff logs PS Conversation under CE Events dated 7/7/2023.
- PS manager/supervisor reviews and approves PS Resolution.
- PS staff uploads necessary documents into to ONE System.
- Plane ticket and gift card for meals purchased and set aside for Lily.
- FA process followed to fund PS resolution (reimbursement to provider for plane ticket and gift card).

7/7/2023



- PS Financial Assistance is issued. FA purchases plane ticket and reimburses provider for gift card and plane ticket on 7/11/2023.
 - Note: If provider issues funds internally, then internal funding process would be followed.

7/11/2023



- PS staff meet with Lily to provide gift card and plane ticket details
- PS staff log PS Resolution:
 - 1) Problem Solving Financial Assistance under CE Services dated 7/12/2023.
 - 2) Problem Solving Conversation under CE Events dated 7/12/2023.
 - Result: Client housed/re-housed in a safe alternative: YES
 - Result Date: 7/12/2023
- PS staff exit Lily from the ONE System.

7/12/2023



Problem Solving Workflow

Case Example: Lev

Meet Lev

- Lev lost their housing after a separation from their partner.
- Lev has been staying at a shelter for the past month.
- They are working full-time (\$3500/month).
- They found an apt but cannot afford move-in costs.

- Lev came to an Access Point and met with PS staff.
- PS staff completed PS Screening and has initial PS Conversation.
- PS staff and Lev discussed Lev's situation. They discuss potential for Lev to receive PS Financial Assistance to support with move-in costs and furniture.
- PS staff requests Lev bring supporting documents.
- PS staff and Lev schedule a follow-up meeting for 8/7/2023.
- PS Conversation logged under CE Events dated 8/3/2023.

8/3/2023



- Follow-up PS Conversation between PS staff and Lev.
- Lev brings supporting documents to PS staff.
- PS staff discusses furniture assistance, and picks essential items to be ordered through El Corazon with Lev.
- PS staff completes required documents with Lev.
- PS manager/supervisor reviews and approves PS Resolution.
- PS staff uploads necessary documents into ONE System.
- PS staff places furniture order with El Corazon.
- PS staff logs PS Conversation under CE Events dated 8/7/2023.
- FA/internal process followed to fund PS Resolution (move-in assistance and furniture).

8/7/2023



- FA/internal finance team issues move-in assistance to landlord.
- PS staff calls Lev to inform them of this payment being made.
- PS staff logs PS Conversation under CE Events with information above dated 8/11/2023.
- *NOTE: Since El Corazon has not invoiced or been paid for the furniture, this PS Resolution is not yet complete!*

8/11/2023



- El Corazon sends PS staff invoice.
- PS staff uploads invoice into ONE System and informs FA/internal finance team.

8/17/2023



- FA/internal finance team issues payment to El Corazon and informs PS staff.
- PS staff calls Lev for final outreach/conversation and confirm delivery was made.
- PS staff log PS Resolution:
 - 1) Problem Solving Financial Assistance under CE Services dated 8/20/2023. Services are separated into appropriate categories.
 - Move-in assistance
 - Furniture assistance
 - 2) Problem Solving Conversation under CE Events dated 8/20/2023.
 - Result: Client housed/re-housed in a safe alternative: YES
 - Result Date: 8/20/2023
- PS staff exit Lev from the ONE System.

8/20/2023



Resources

Bitfocus Help Desk

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Call: (415) 429-4211

ONESF Help Center Web Page:

onesf.bitfocus.com

The Help Desk Chat

