Coordinated Entry

Family Access Point Training

Bitfocus

Learning Objectives

- Review the Family Coordinated Entry (CE) and shelter workflow in the ONE System
- Review the New Problem Solving workflow
- Learn about the new Multiple queues

Bitfocus

Agenda

- Profile
- Contact/location tab
- Eligibility Assessment
- CE Program Enrollment
- Current Living Situation Assessment
- Problem Solving
- Housing Primary Assessment

- Referral to Community Queue
- Shelter Placement Criteria
- Unsheltered Verification
- Congregate Shelter Placement
- Individual Room Shelter Placement
- Matchmaking
- CE Exits

Definitions

Community Queue (CQ): a list of clients who have been prioritized for shelter or housing.

- ► Permanent Housing/Rapid Re-Housing (RRH)
- ► Family Shelter
- ► Family Transitional Housing

Matchmaking: the process of determining what resources clients are eligible for and making a referral to the resource

Matchmaker: the staff responsible for making the referral

Navigating ONE

All coordinated entry work for families should be done under the San Francisco Family Coordinated Entry Agency.
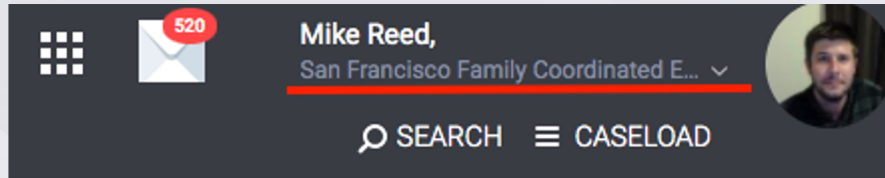
Client Profiles

Looking up clients in ONE

- Search for client/ head of household
  - Search by name, partial 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.

anaged with **Clarity Human Services**   🗑 Recover deleted data

Bitfocus

Duplicate Profiles

- If you discover multiple profiles in ONE for a client, you should send the unique identifier numbers to the Bitfocus Helpdesk.
  - Provide the unique identifiers for each profile.
  - Identify which is the primary profile (the one that has more activity or is more current).

Bitfocus Helpdesk: onesf@bitfocus.com or (415) 429- 4211

Creating New Profiles

- Please make sure to collect as much information as possible, avoid using "Client refused" or Data Not Collected" whenever possible.
- For existing profiles, confirm that all information is correct.

Release of Information

When creating a new client profile, ONE will prompt you to have the client sign a Release of Information.

- The Release of Information date, should correspond with both the date that the client signed the release and the date you created the client profile.

Uploading ROIs

- To upload an ROI, select the files tab
- Select the category for Release of Information
- Verbal consent: Make note on the ROI that verbal consent was obtained and that the document could not be signed due to COVID-19 distancing measures.

Creating a Household

- After creating the Head of Household's record in ONE, you must create a record for each family member and link the records together.

1

2

3

Managing Households

- If the family composition changes, you may need to remove family members.

Contact and Location Information

Update Contact Information and Location

Contact Information

Location

Eligibility Assessment

Eligibility Assessment

- Completed for all clients trying to access Family CE.
- Completed prior to enrolling the client in CE.
- Assesses a family's eligibility by determining:
  - Current living situation
  - Is the family in SF or are their children attending school in SF?

Bitfocus

Eligibility Assessment

Pre-Enrollment Services

There are 3 services that can be provided before or separate from the CE enrollment through the client level services tab.

Bitfocus Test

PROFILE HISTORY **SERVICES** PROGRAMS

SERVICES

Requested Assistance from APs?

SIP Outreach Attempt

Unique Circumstances

Used to document the primary purpose for visiting/engaging an Access point.

Used to document a 'Shelter In Place' outreach attempt .

Used to enter a note and document any unique circumstances.

Bitfocus

Coordinated Entry Enrollment

CE Enrollment

- All clients who are eligible for CE should be enrolled into a CE program.
- Enrollments are completed to show that clients are actively being engaged by the Homeless Response System (HRS).
- Eliminates duplication of staff efforts and burden on the client.
  - Information cascades forward to other fields/screens in ONE
- HUD requires all CE activity to happen within a program enrollment.

Bitfocus

CE Enrollment

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 acces 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

2
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

CE Enrollment

Enroll Program for client Freddy Fox

Program Entry Date   08/27/2019 📅

DISABLING CONDITIONS AND BARRIERS

Disabling Condition   Select ▾

Physical Disability   Select ▾

Developmental Disability   Select ▾

Chronic Health Condition   Select ▾

HIV - AIDS   Select ▾

Mental Health Problem   Select ▾

Substance Abuse Problem   Select ▾

Victim of Domestic Violence   Select ▾

CASH INCOME FOR INDIVIDUAL

Income from Any Source   Select ▾

NON-CASH BENEFITS

Receiving Non-Cash Benefits   Select ▾

HEALTH INSURANCE

Covered by Health Insurance   Select ▾

SAVE & CLOSE   CANCEL

Audit Log

aged with **Clarity Human Services**

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 possile.

Bitfocus

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.

Bitfocus

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 either the Family Primary Assessment or the Shelter Placement Criteria . 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.

Bitfocus

Current Living Situation Assessment

Current Living Situation Assessment

Living Situation Verified By field should be used to record that element on behalf of a non-participating project.

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

Bitfocus

Problem Solving

Problem Solving Screening

- 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

- Should be completed at each new program enrollment and new engagement with household who are Problem Solving status.

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

Bitfocus

Problem Solving Screening

A Problem Solving Screening should be completed with every client.

Problem Solving Conversation Services

- A Problem Solving Conversation service should be entered to document "housing-focused" case management conversation exploring alternatives to a housing crisis outside of the homelessness response system.
- An outcome should be recorded for each service.
  - Formerly Problem Solving Resolution has been reworded to "Client Housed/Re-Housed in a Safe Alternative".
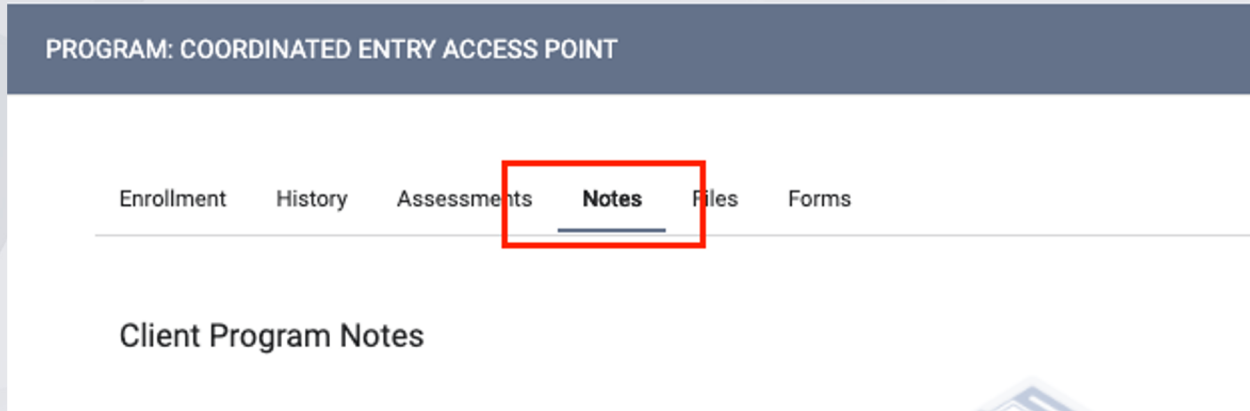
Not a Problem Solving Conversation

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.

Bitfocus

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*.

Problem Solving Services

- There are financial and non-financial services.
  - The financial service will have service items to choose from.
- Expense amounts should be entered for financial services.
- An outcome should be recorded for each service.
  - For non-financial services, if the outcome is unknown, select NO.
  - For financial services, the outcome should always be YES.
  - If entering more than one Problem Solving Service for the same date/interaction, please make sure that only **one** of the services captures the Resolution/Outcome of "Yes"

Bitfocus

Problem Solving Services

Referral to Other Problem Solving Resources Service

- HSH policy requires Problem Solving staff to refer to other financial resources first (if applicable and available).
- "Referral to Other Problem Solving Resources" should be selected when referring to:
  o Homeward Bound
  o Eviction Prevention/Homelessness Prevention
  o Move-in Assistance
- General referrals to community services should **not** be entered in this category.
- The result "Client Housed/Re-Housed in a Safe Alternative" will always be No since another agency/program will issue the financial assistance.

Bitfocus

Problem Solving Referrals

Problem Solving Referral to another Problem Solving Resource   Coordinated Entry Event ⌃

Referred to Eviction Prevention	⌄
Referred to Homeward Bound	⌄
Referred to Move-In Assistance	⌄

Start Date: 10/01/2020 📅   **End Date:** 10/01/2020 📅

Result: Client housed/re-housed in a safe alternative   ✓
- ✓ -- Select --
- Yes
- **No**

Service Note

B | *I* | ⅛≡ | ⁝≡

New Multiple Queues

Multiple Community Queues

- San Francisco is starting with three queues:
    - Permanent Housing/RRH
    - Family Shelter
    - Family Transitional Housing
- The queue you are actively working in will be highlighted blue.
- Clients can be placed on up to five queues at once.
- Each queue is completely distinct from the other queues.
    - If a client is removed from one queue, it does not affect their placement on other queues.

Family Housing Prioritization (Primary) Assessment

Family Housing Prioritization (Primary) Assessment

- Completed for clients that did not resolve their homelessness via problem solving.
- Evaluates a client's possible health vulnerability, housing barriers, and homelessness chronicity.
- Determines prioritization for housing resources: Housing Referral Status vs. Problem Solving status.
- Does NOT guarantee eligibility for a housing resource.
- Is not visible to all users to protect client's privacy

Bitfocus

Family Housing Prioritization (Primary) Assessment

- Prior to completing an assessment, you should **check the client's history tab** to see if they have already completed an assessment
- Assessment are valid for 90 days
  - Do not complete a new assessment (within the 90 days) unless there has been a change in population (family composition changes).

Completing the Assessment in ONE

Completing the Assessment in ONE

FAMILY PRIORITIZATION ASSESSMENT

SECTION 1: LIVING SITUATION AND HOUSING HISTORY

Complete the fields in the assessment being as thorough as possible (try to avoid using data not collected)

1) Where did you stay last night? (living situation, not geography)
Select

2) How long have you been homeless this time (lived in ES or place not meant for human habitation)?
Select

3) Has the head of household been residing in an institutional care facility?
Select

4) Has the head of household resided in an emergency shelter, safe haven, or on the street/place not meant for human habitation for more than 12 months (total) over the last 3 years?
Select

5) How many times in the past 3 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

6) Number of stays in a family shelter in San Francisco in past 2 years?
Select

7) When was the last time any adult household member had a lease in their own name?
Select

8) How many times has any adult household member left housing due a legal eviction notice?
Select

9) Is anyone in the household age 5 or under?
Select

THE REMAINING FIELDS ARE USED FOR STATISTICAL PURPOSES (NO INPUT NECESSARY)

SAVE   CANCEL

Referral to the Community Queue

Referring to the Community Queue (CQ)

- Families who are considered Housing Referral Status should be referred to the Permanent Housing/RRH Community Queue.
  - Note, HSP eligible families, are referred to the queue regardless of whether they are housing referral of problem solving status.

Referrals to the CQ

- If the client 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.
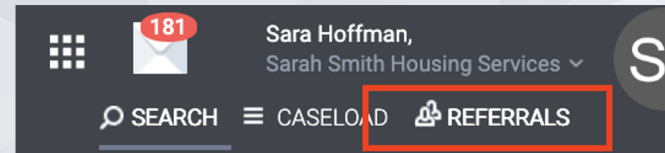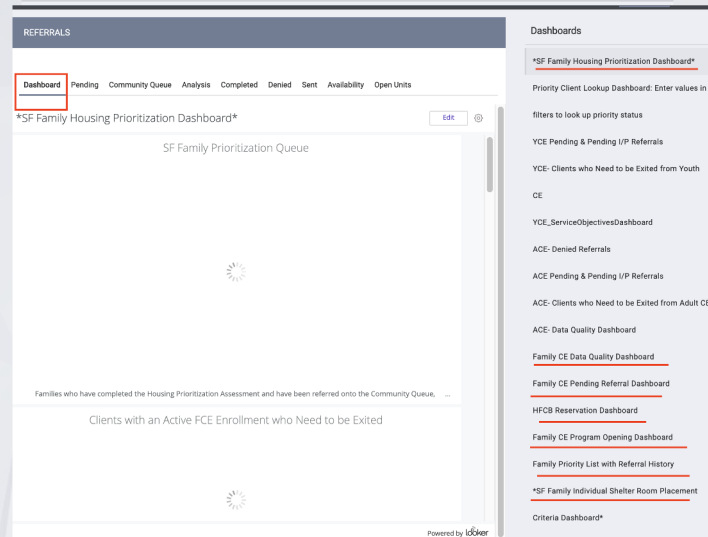
BREAK

Accessing Dashboards in ONE
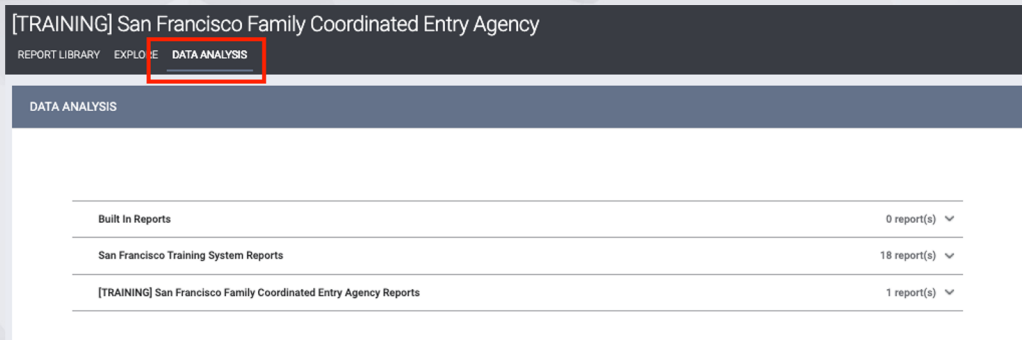
- There are a number of dashboards that will be used as part of the shelter workflow. They can be accessed through the
  - Data Analysis Tab
  - Referrals-->Dashboard tab

SF Family Shelter Placement Process

- Shelter (Individual Room) Placement Criteria
- Referral to Shelter Queue
- Need to be Verified Unsheltered
- Referral and Placement at Hamilton Family Congregate Beds
- Referral and Placement at an Individual Room Shelter (IRS)

Bitfocus

Shelter (Individual Room) Placement Criteria

Shelter Placement Criteria

- Families 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 queue.

Bitfocus

Shelter Placement Criteria

A Shelter (Individual Room) Placement Criteria can be created through the program-level assessments tab.

Shelter Placement Criteria

ANSWER THE FOLLOWING QUESTIONS TO THE BEST OF YOUR ABILITY. CERTAIN FIELDS, SUCH AS VERIFICATION FIELDS, MAY NEED TO BE REVISITED AT A LATER DATE

Assessment Location — Central City Access Point

FOR YES/NO TOGGLES BLUE=YES & GRAY=NO

Date — 09/02/2020

In order for a family to be referred to HFCB, they first need to be *verified* unsheltered by SFHOT or mobile Access Point Team. If the family has not yet been verified unsheltered, then the AP should activate (blue) the toggle to indicate the family needs to be verified unsheltered.

Does this family need to be verified unsheltered?

Untoggle

Has this family been verified unsheltered by SFHOT or Access Point Outreach Teams? — Verified Unsheltered Date __/__/____

Once the family has been verified unsheltered, the *verified unsheltered* toggle needs to be activated and the date they were verified unsheltered needs to be entered (VERY IMPORTANT for Prioritization). You should also untoggle the need to be verified unsheltered toggle.

Has this unsheltered family visited or engaged the Access Point? — If the family has visited/engaged the AP, then activate this toggle.

Bitfocus

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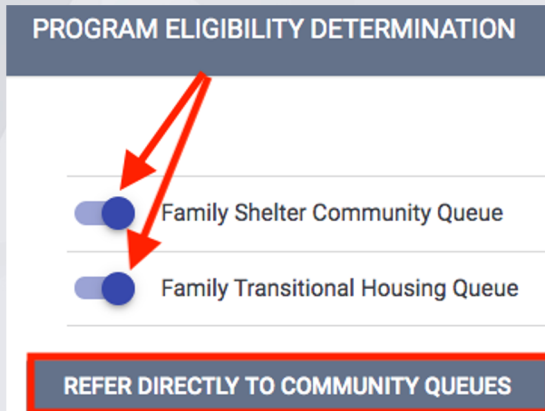
Family Status	Adult with physical and legal custody of minor child(ren)
How many people do you have in your immediate family that are in need of housing?	2
How many of those individuals are under the age of 18?	1
Head of household age?	24
Family member #2's age?	3
Are you pregnant or is any household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

- Complete the rest of the Shelter Placement Criteria indicating who is in need of shelter.
- Select "Save"

Bitfocus

Referring to Family Shelter and Transitional Housing Queues

- When you save the Shelter Placement Criteria, it will take you to the screen where you can refer the client to the queue.
- Families don't need to have Housing Referral Status to be referred to the shelter or TH queue.
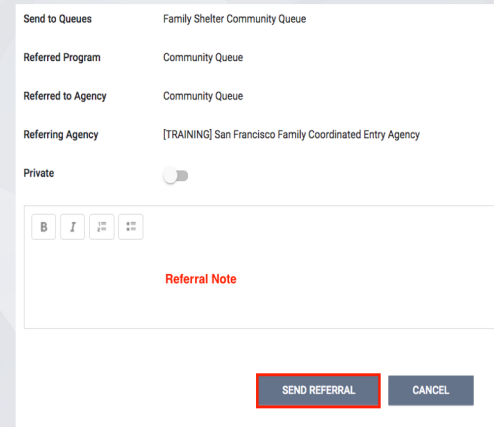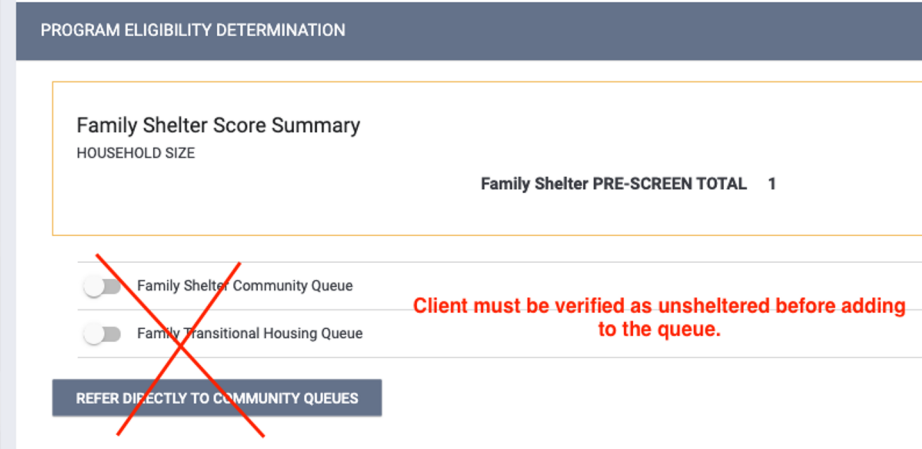
Shelter Placement Criteria (cont.)

- A family's Shelter Placement Criteria will be referred to the queue only after they have been been verified as unsheltered.
- If the family needs to be verified as unsheltered, you should close the client's profile or move on to another step in the workflow.

PROGRAM ELIGIBILITY DETERMINATION

Family Shelter Score Summary
HOUSEHOLD SIZE

Family Shelter PRE-SCREEN TOTAL   1

Family Shelter Community Queue

Family Transitional Housing Queue

Client must be verified as unsheltered before adding to the queue.

REFER DIRECTLY TO COMMUNITY QUEUES

Bitfocus

Need to be Verified Unsheltered

Need to be Verified Unsheltered

- Mobile AP teams will use the "Families who Need to be Verified Unsheltered" dashboard to locate families who need to be verified unsheltered.
- The "Families who Need to be Verified Unsheltered" dashboard contains recent, active location and contact info for families on the Shelter CQ who need to be verified unsheltered.
- Reporting➜Data Analysis tab

Need to be Verified Unsheltered

Once a family has been verified unsheltered, the Mobile AP staff will update the client's Shelter Placement Criteria indicating the verified date.

Referral to the Community Queue

Referring to Family Shelter and Transitional Housing Queues

- Once the family has been verified as unsheltered, the Shelter Placement Criteria should be referred to the Shelter and TH queue.
  - Families don't need to have Housing Referral Status to be referred to the shelter or TH queue.

Referring to Family Shelter and Transitional Housing Queues

To refer the assessment to the queue:
- Go to the program level assessment screen.
- Click Eligibility to the right of the Shelter Placement Criteria.
- Turn on the toggle for the shelter and transitional housing queues and click *Send Referral.*

Placement at Hamilton Family Congregate Beds (HCFB)

Placement at Hamilton Family Congregate Beds (HCFB)

- In order for a family to qualify for HFCB, they need to be verified as unsheltered.
- Verified Unsheltered Families can be located on the "HFCB Reservation Dashboard"
  - Data Analysis Tab
  - Referrals➡ Dashboards tab
- Families who have been verified unsheltered the longest will be offered beds at HFCB first.

Placement at Hamilton Family Congregate Beds (HCFB)

- Before reserving beds for a family at HFCB, you will need to check the *Verified Unsheltered* list for a "Denied Service" by that agency.
  - *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 ∧
1			Catholic Charities CYO	No DoS Recorded	∅	∅	∅	∅	0	∅	
2			Hamilton Families	No DoS Recorded	2020-06-11	∅	∅	∅	0	∅	
3			Catholic Charities CYO	No DoS Recorded	∅	∅	∅	∅	0	∅	
4			Catholic Charities CYO	No DoS Recorded	∅	∅	∅	∅	0	∅	
5			Hamilton Families	No DoS Recorded	2020-06-11	∅	∅	∅	0	∅	
6			Compass Family Services	Mulitple Denial of Service Reasons	∅	∅	∅	∅	1	∅	
7			Catholic Charities CYO	No DoS Recorded	∅	∅	∅	∅	0	∅	
8			Hamilton Families	No DoS Recorded	2020-06-11	∅	∅	∅	0	∅	

HFCB Reservation Dashboard

- The *HFCB Primary Bed Reservation Status Look* summarizes all of the beds at HFCB for the next week.
  - Reserved beds are marked with blue.
  - Non-reserved beds are null.
- APs attempt to find a group of beds in the same room that can shelter the highest priority family.
  - Children must be over the age of 6 to occupy a "top "bunk and under the age of 5 to share a "Bottom" bunk with their parent

HFCB Primary Bed Reservation Status

Slot Number ^		Room/Bed Description	Bed #	2020-09-02 Reservation Status	2020-09-03 Reservation Status	2020-09-04 Reservation Status	2020-09-05 Reservation Status	2020-09-06 Reservation Status	2020-09-07 Reservation Status	2020-09-08 Reservation Status
2	2	COVID-19 Offline Beds 3&4: Room 401(Beds1-4): Children must be at least 6yrs old to sleep in top bunk	2 (Bottom)	RESERVED	RESERVED	RESERVED	RESERVED	RESERVED	RESERVED	RESERVED
3	3	COVID-19 Offline Beds 3&4: Room 401(Beds1-4): Children must be at least 6yrs old to sleep in top bunk	COVID-19 Offline 3 (Top)	∅	∅	∅	∅	∅	∅	∅
4	4	COVID-19 Offline Beds 3&4: Room 401(Beds1-4): Children must be at least 6yrs old to sleep in top bunk	COVID-19 Offline 4 (Bottom)	∅	∅	∅	∅	∅	∅	∅
5	7	COVID-19 Offline Beds 5&6: Room 401(Beds 5-8): Children must be at least 6yrs old to sleep in top bunk	COVID-19 Offline 5 (Top)	∅	∅	∅	∅	∅	∅	∅
6	8	COVID-19 Offline Beds 5&6: Room 401(Beds 5-8): Children must be at least 6yrs old to sleep in top bunk	COVID-19 Offline 6 (Bottom)	∅	∅	∅	∅	∅	∅	∅
7	9	COVID-19 Offline Beds 5&6: Room 401(Beds 5-8): Children must be at least 6yrs old to sleep in top bunk	7 (Top)	∅	∅	∅	∅	∅	∅	∅

- *Note: A number of beds are currently labeled as being "Offline" due to COVID social distancing.*

Bitfocus

Switching Agencies

The APs will need to switch to the Hamilton Families agency before making the reservation.
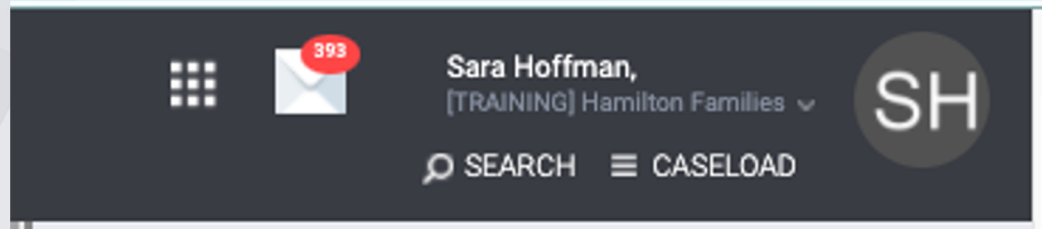
Reserving Beds at HFCB

- Once a family has been identified, the APs need to reserve the beds.
- To reserve the beds:
  - Navigatie to the *Attendance Tool*
  - *Reservation*
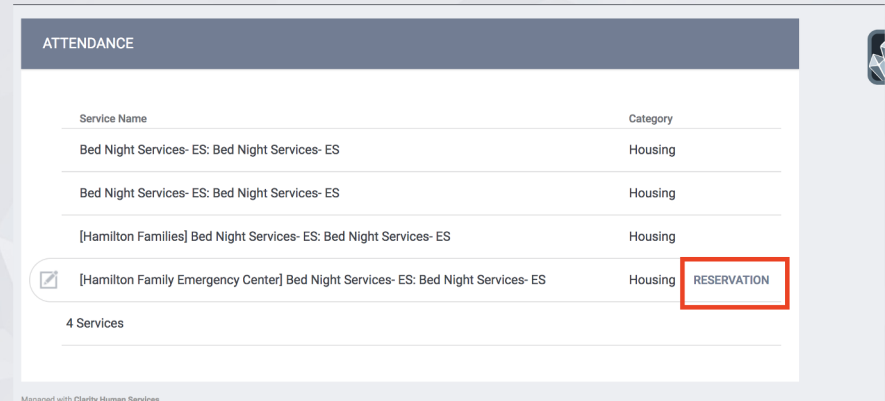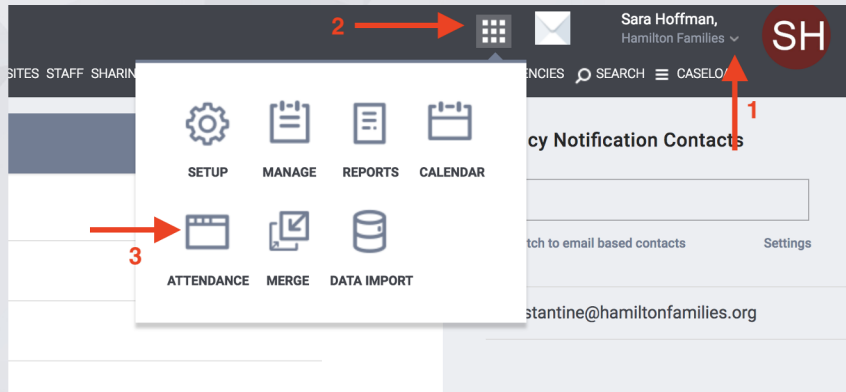
Reserving Beds at HFCB

In the Reservation/Attendance tool, each color indicates the following status:

- Blue= a reserved bed.
- Orange = a reserved bed where the person was marked "Present" for that day.
- Red= a reserved bed where the person was marked as a "No Show".
- White= an unreserved bed.

Reserving Beds at HFCB

- Select the unreserved bed you want to fill.

- Search for the client.

- Select *Preview Reservation*.

- You will need to do this for all clients in the family who are reserving a bed.

Reserving Beds at HFCB

- Once you have previewed the reservation, scroll to the bottom page and click "Confirm".
- 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.

Bitfocus

Scheduling Intake Appointments

Switching Agencies

AP will need to switch back to the Family CE Agency before scheduling the appointment
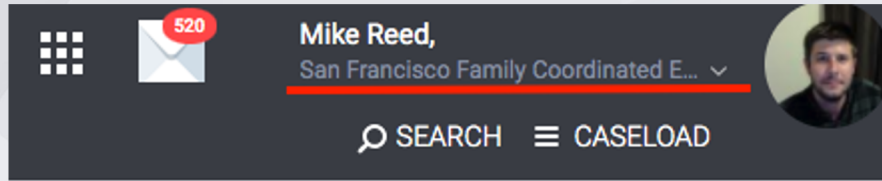
Scheduling HFCB Intake Appointments

- Review the *Daily Count of Appointments Scheduled with HFCB by Appointment Time* Look (On the *HFCB Reservation Dashboard*) to see when the next available intake appointment is.

- There are three intake appointments available a day:
    - 10:00 AM
    - 2:00 PM
    - 5:00 PM

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

If the Look shows no results, it means all appointments are still available for that day.

Bitfocus

Scheduling HFCB Intake Appointments

To schedule an appointment, record a *Schedule Appointment with Hamilton Family Congregate Beds (HFCB)* service.

- The intake appointment must occur prior to the beginning of their stay at HFCB.
- Make sure to schedule the appointments at least 2 hrs before the appointment.

Scheduling HFCB Intake Appointments

- That appointment will be reflected in the *Daily Count of Appointments* and the *Clients with HFCB Intake Appointment Looks*.

  These Looks will also be emailed to HFCB staff daily at 8am, 12pm, and 3pm.

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	∅	∅	2
2018-05-08	∅	1	1	2
2018-05-11	∅	∅	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 ∨	Most Recent Appointment Time with HFCB
Test Test	5814AE06E	2018-04-20	Yes	2018-04-27	4	2	No	∅	∅	2018-05-11	Appointment with HFCB at 5 PM
Test McTesty	997C9DF44	2018-05-08	Yes	2018-05-08	3	2	No	∅	∅	2018-05-08	Appointment with HFCB at 5 PM

Bitfocus

Individual Room Shelter

Identifying Families for Individual Room Shelter

- Th *Individual Room Shelter List* contains all families that are eligible for IRS.
  - Families are prioritized by *Total Time in Shelter or Verified Unsheltered.*
  - Identify the highest priority family on the IRS Placement List that fits the specifications of the posted opening.

Denial of Service

Review the orange *Active 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 to see what agency the denial of service was with.
  - Families cannot be referred to an agency where they have a denial of service.

BREAK

Program Openings

- Openings for family resources can be seen in multiple places.
- The reports can be located on the *Dashboard Tab* or under *Data Analysis*.

Name of Report	Location of Report	What the Report Shows
Open Units Report	● Open Units Tab	Show shelter and housing openings for all populations
Current Family CE Shelter Program Openings	● Dashboard Tab (on the SF Family Individual Shelter Room Placement Criteria Dashboard)	Family shelter openings
All Current Family CE Program Openings Report	● Data Analysis ● Dashboard Tab	Family shelter and housing openings

Bitfocus

Program Openings

- Current Family CE Shelter Program Opening reports is the easiest place to look for shelter openings.

Name of Report	Location of Report	What the Report Shows
Open Units Report	● Open Units Tab	Show shelter and housing openings for all populations
Current Family CE Shelter Program Openings	● Dashboard Tab (on the SF Family Individual Shelter Room Placement Criteria Dashboard)	Family shelter openings
All Current Family CE Program Openings Report	● Data Analysis ● Dashboard Tab	Family shelter and housing openings

Bitfocus

Claim Responsibility for an Opening

Switching Agencies

- The APs will need to switch to the agency they will be referring to to claim responsibility for that unit.
- They then need to switch back to CE before making the referral.
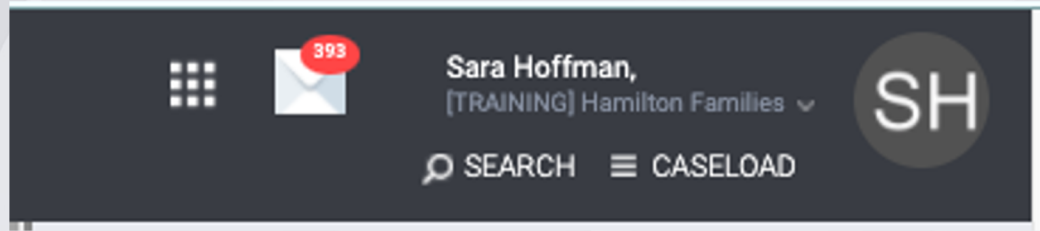
Claiming Responsibility for a Program Opening

- Navigate to the Referrals➜ Availability tab.
- Edit the available opening.
- Enter the name of the AP staff under the *Access Point Staff Responsible for Filling Opening.*

Matchmaking

Matchmaking

- All of the permanent housing, RRH, and transitional housing programs have been set up in the ONE System with eligibility criteria.
- The Eligibility Engine compares the eligibility criteria to the responses from the clients assessments and profile screen.
- The Community Queue can generate a list of clients who are eligible for specific programs.

Bitfocus

Matchmaking

- The process for matchmaking is very similar no matter which queue you are using.
- For PSH or RRH- use the *Permanent Housing/RRH Community Queue.*
- For shelter, use the *Family Shelter Queue.*
- For transitional housing- use the *Family Transitional Housing Queue.*
  - Although the TH matchmaking process is different than Individual Room Shelter, TH is considered shelter and families do not need to have Housing Referral Status to be eligible.

Bitfocus

Matchmaking

There are various filters you can use to sort the clients on the queues.

- Search- you can enter a client name or unique ID.
- Mode= allows you to sort by assessment type and show the assessment score for each client.
- Active Agency= the agency you are referring to.
- *Eligible Clients Only-* generates a list of clients who meet the eligibility criteria for a specific agency and/or program.
- Project= the program you are referring to.

Bitfocus

Matchmaking (Individual Room Shelter)

- Families are identified using the Individual Room Shelter List (shown a few slides ago).
- Search for the family on the Family Shelter Queue.

Matchmaking (Permanent Housing, RRH or Transitional Housing)

- Click the appropriate queue.
- Use search parameters including mode, agency, eligible clients and project name.

Matchmaking

Once the client has been identified, make the referral.

Assigning a Navigator

When making the referral, AP staff can assign themselves as the Navigator

Tracked Characteristics

- Certain buildings/programs have additional eligibility criteria that only pertains to a portion of the units in a building.
- You will need to add additional filters to the search criteria when matchmaking for these units (called tracked characteristics).
- Providers will indicate in the notes box on the unit posting when additional eligibility criteria is required for a unit.

Bitfocus

Tracked Characteristics

Example: The Evergreen PSH Apartments has 24 units. 20 units require a family who has an income less than 30% of the AMI. The remaining 4 units require the same eligibility but are dedicated to clients with a mental health disability. The program eligibility was configured in ONE including only the income requirements.

When searching for one of the 4 units that are dedicated to clients with a mental health disability, we will need to include an additional filter.

Tracked Characteristics

Removal from the Queue

Removing from ES/TH Queue

- Once a family has been enrolled in IRS or TH, they need to be removed from the other queue.
- The *Clients to be Removed from the TH or ES Queues Look* 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.

	Dashboard	Pending	Community Queue	Analysis	Completed	Denied	Sent	Availability	Open Units

SF Family Individual Shelter Room Placement Criteria Dashboard

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
1	Onyx Test	35266B209	Shelter (Individual Room) Placement Criteria	2020-03-20		Remove from ES Queue

Bitfocus

Removal from the ES/TH Queue

Services

Services

There are services configured to document various interactions throughout the Family Shelter and Housing process.

You may see service items under a service which allows you to be more specific about the interaction.

Services

- Dates should be entered for every service.
- A case notes should be entered under *Service Note*.

Services

If a service is categorized as a CE Event, you need to enter a Current Living Situation when the services is entered.

Housing Case Review Outcome	Housing Search and Placement ⌄
Housing Case Review Request	Housing Search and Placement ⌄
Problem Solving Conversation	Coordinated Entry Event ⌄
Problem Solving Financial Assistance	Coordinated Entry Event ⌄
Problem Solving Housing Location Assistance	Coordinated Entry Event ⌄
Problem Solving Mediation Services	Coordinated Entry Event ⌄
Problem Solving Referral to another Problem Solving Resource	Coordinated Entry Event ⌄
Problem Solving_COVID19_Flex Fund Allowance	Coordinated Entry Event ⌄
Refused Housing Referral	Coordinated Entry Event ⌄
Refused Individual Room Shelter Referral	Housing Search and Placement ⌄

Checking In

Services

Checking in a client can keep them active on the queue.

Uploading Documents

Uploading Documents into ONE

- Client documents should be uploaded into the client's record in case the original gets misplaced and so other staff can access the documents as needed.

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

1

CLIENT FILES

There are no results to display

UPLOAD A FILE

Category   Background Check

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

File   Select File

Trouble attaching files? Switch to the Basic Uploader

Private

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

Managed with **Clarity Human Services**

Exits

Exits

- Client should be exited from CE for the following reason:
    - Client has left San Francisco
    - The client has been successfully problem solved
    - The client is known to be housed
    - Client is deceased
    - The client has been housed by CE
    - No activity with the client for 90 days or more
- If a client is being exited from CE, but they still have a Pending Referral on the Community Queue, remove the client from the queue at the time of exit.

Exits

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 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.

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 program enrollment after 90 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	90 days	If a client has been referred to a housing program and the referral sits pending for more than 90 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	90 days	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 CE program	

Bitfocus

Reporting

CE Demographics Report

- [OUTS-108] CE Demographics Report
  - Understand the demographics of the people served by the CE System.
    - Veteran Status
    - Age
    - Gender
    - Race
    - Disabling Conditions
    - Chronic Homeless Status

CE Demographics Report

[TRAINING] San Francisco Family Coordinated Entry Agency
Date Range: 03/01/2020 AND 10/12/2020
Veteran: All
Referral Basis: Only clients referred to a queue
Queue List: Family Shelter Community Queue , Family Transitional Housing Queue , Permanent Housing/ RRH Community Queue, SFHOT Stabilization Rooms
Referral Statuses: Pending

Age Range	# of Clients
Under 5	0
5 - 12	0
13 - 17	0
18 - 24	0
25 - 34	0
35 - 44	0
45 - 54	0
55 - 61	0
62+	0
No Answer	0
Total	0

Gender	# of Clients
Female	0
Male	0
Trans Female (MTF or Male to Female)	0
Trans Male (FTM or Female to Male)	0
Gender Non-Conforming (i.e. not exclusively male or female)	0
Client doesn't know	0
Client refused	0
No Answer	0
Total	0

Race Demographic	# of Clients
American Indian or Alaska Native	0
Asian	0
Black or African American	0
Native Hawaiian or Other Pacific Islander	0
White	0

Chronic Homeless	# of Clients
No	0
Yes	0

Clients Entering from Homelessness	# of Clients
Yes	0
No	0

Approximate Date Started	# of Clients
365 Days or More	
Less Than 365 Days	
Missing	
Not applicable	

Times Homeless in the Past Three Years	
One Time	
Two Times	
Three Times	
Four or more times	
Client doesn't know	
Client refused	
No Answer	

Total Months Homeless in the Past Three years	
One month (this time is the first month)	
Two Months	
Three Months	

Hispanic Ethnicity Demographic	# of Clients
Non-Hispanic/Non-Latino	0
Hispanic/Latino	0
Client doesn't know	0
Client refused	0
No Answer	0
Total	0

Prior Living Situation	# of Clients
Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)	0
Emergency shelter, including hotel or motel paid for with emergency shelter voucher, or RHY-funded Host Home shelter	0
Safe Haven	0
Foster care home or foster care group home	0
Hospital or other residential non-psychiatric medical facility	0

CE Assessing Staff Report

- [GNRL-405] CE Assessing Staff Report (Assessment Reports)
  - All assessments created during the reporting period
  - Separated by the assessing staff person.

CE Assessing Staff Report

Kadra Adderly: **Alameda County CE Agency (Test)

Date	Client Full Name	Unique ID	Age	Gender	Veteran	CE Household Type	Adults in CE Household	Children in CE Household	Assessment Name	Assessment Score	Referred to Queue	Contact Info	Assessing Agency	Assessing Program
09/21/2020	Bunny, Bugs	49D21344B	35	Male	No	Without Children	1	0	CE- Crisis Assessment	18		No	Bitfocus Coordinated Entry Agency	Bitfocus Coordinated Entry
09/21/2020	Bunny, Bugs	49D21344B	35	Male	No	Without Children	1	0	CE- Housing Assessment	93	Permanent Housing & RRH Queue	No	Bitfocus Coordinated Entry Agency	Bitfocus Coordinated Entry

Number of Clients Assessed: 1

Kendall Shawhan: **Alameda County CE Agency (Test)

Date	Client Full Name	Unique ID	Age	Gender	Veteran	CE Household Type	Adults in CE Household	Children in CE Household	Assessment Name	Assessment Score	Referred to Queue	Contact Info	Assessing Agency	Assessing Program
09/02/2020	Leaves-Ks, Fall	A9A3C0390	41	Female	No				CE- Housing Assessment	90	Default, Permanent Housing, Permanent Housing & RRH Queue	No	Bitfocus Coordinated Entry Agency	
08/25/2020	Test, Anna	6A99332C5	29	Female	No	Without Children	1	0	CE- Housing Assessment	66		No	Bitfocus Coordinated Entry Agency	Bitfocus Coordinated Entry
08/25/2020	Test, Tommy	B8533C74E	41	Male	No	Without Children	1	0	CE- Housing Assessment	48		No	Bitfocus Coordinated Entry Agency	Bitfocus Coordinated Entry

Number of Clients Assessed: 3

Sara Hoffman: **Alameda County CE Agency (Test)

Date	Client Full Name	Unique ID	Age	Gender	Veteran	CE Household Type	Adults in CE Household	Children in CE Household	Assessment Name	Assessment Score	Referred to Queue	Contact Info	Assessing Agency	Assessing Program
08/21/2020	Spot, Johnny	0DA1400DC	21	Male	Yes	Without Children	1	0	CE- Crisis Assessment	57		No	Bitfocus Coordinated Entry Agency	Bitfocus Coordinated Entry
10/02/2020	Spot, Johnny	0DA1400DC	21	Male	Yes	Without Children	1	0	CE- Crisis Assessment	63		No	Bitfocus Coordinated Entry Agency	Bitfocus Coordinated Entry
08/05/2020	Test, Sara	8A6BC23AE	21	Female	No	Without			CE- Housing Assessment	122		No	Bitfocus Coordinated Entry	Bitfocus Coordinated Entry

CE Community Queue Detail Report

- [RFRL-122] CE Community Queue Details Report (Community and Referrals)
  - Provides details about client on the queues

CE Community Queue Detail Report

CE Community Queue Details | **BF-100 Bitfocus Testing**

Crisis Housing Queue

Unique ID	Client Name	Gender	SSN	Age	Race	Ethnicity	Veteran	Assessment Date	Assessment Processor	Score	Days on Queue
1D83E0FC2	Away, Miles	Male	xxx-xx-8888	50	Asian	Non-Hispani c / Non-Latino	Yes	09/29/2020	Bitfocus - Test	84	2
45C791266	Berry, Straw	Female	xxx-xx-5987	31	White	Hispanic / Latino	No	07/09/2020	Bitfocus - Test	81	72
53BA87548	Bnl, 1	Female	xxx-xx-1111	30	White	Hispanic / Latino	No	09/10/2020	Bitfocus - Test	105	21
02A75F7A7	Bnl, 1000	Female	xxx-xx-1111	58	Native Hawaiian or Other Pacific Islander	Non-Hispani c / Non-Latino	No	09/10/2020	Bitfocus - Test	69	21
6E29E753F	Bnl, 2000	Trans Female (MTF or Male to Female)	xxx-xx-3434	36	Native Hawaiian or Other Pacific Islander	Hispanic / Latino	No	09/10/2020	Bitfocus - Test	75	21
4DED7BAA8	Bnl, 4000	Male	xxx-xx-3456	33	Black or African American	Non-Hispani c / Non-Latino	No	09/10/2020	Bitfocus - Test	72	21
99956253A	Fever, Cedar	Male	xxx-xx-9387	41	Native Hawaiian or Other Pacific Islander	Non-Hispani c / Non-Latino	No	08/18/2020	Bitfocus - Test	54	44
802278DA1	Flowers, Regina	Female	xxx-xx-1680	54	Multi Racial	Non-Hispani c / Non-Latino	No	09/28/2020	Bitfocus - Test	18	3
5A9BA83BF	McTester1, Tester	Male	xxx-xx-0000	66	White	Non-Hispani c / Non-Latino	No	08/18/2020	Bitfocus - Test	63	44

Total Households in Crisis Housing Queue : 9

Permanent Housing & RRH Queue

Unique ID	Client Name	Gender	SSN	Age	Race	Ethnicity	Veteran	Assessment Date	Assessment Processor	Score	Days on Queue
45C791266	Berry, Straw	Female	xxx-xx-5987	31	White	Hispanic / Latino	No	07/09/2020	Bitfocus - Test	81	72
D1E62ABE6	Bnl, 3000	Male	xxx-xx-2112	32	White	Non-Hispani c / Non-Latino	No	09/16/2020	Bitfocus - Test	117	15
49D21344B	Bunny, Bugs	Male	xxx-xx-7777	35	Black or African American	Hispanic / Latino	No	09/21/2020	Bitfocus - Test	93	10
99956253A	Fever, Cedar	Male	xxx-xx-9387	41	Native Hawaiian or Other Pacific Islander	Non-Hispani c / Non-Latino	No	04/23/2020	Bitfocus - Test	93	161
89E2CB75E	Moors, Heathcliff	Male	xxx-xx-3232	45	Black or African American	Hispanic / Latino	No	09/25/2020	Bitfocus - Test	108	6

Additional Data Resources

In the Report Library under "Assessment Based Reports" and under "Community and Referrals" there are various reports that summarize data surrounding CE Assessments and Referrals
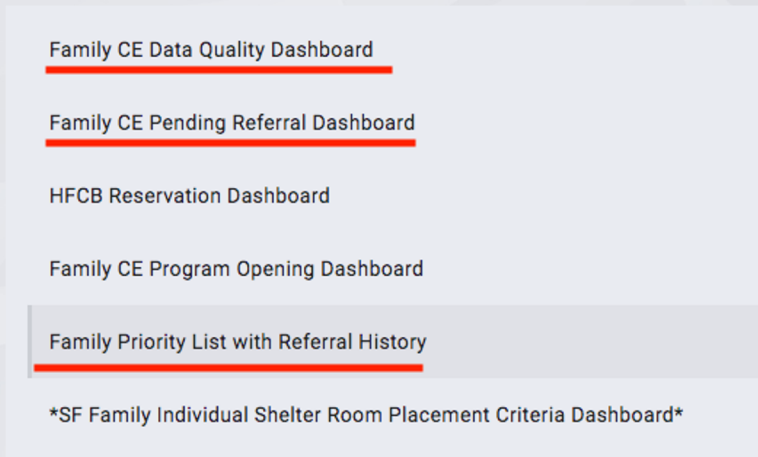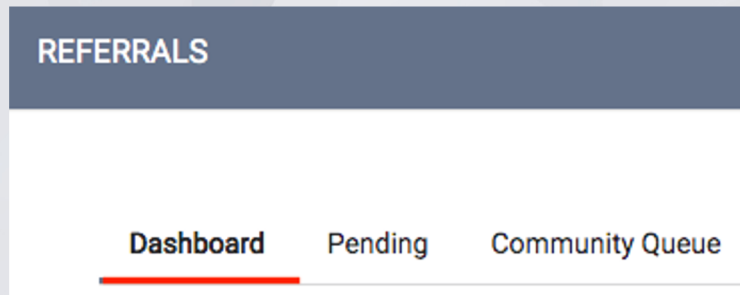
Dashboards

- 'Family CE Data Quality Dashboard'- summarizes various areas of FCE that could be exhibiting DQ issues
- 'Family CE Pending Referral Dashboard'- summarizes all FCE participants with a pending referral
- 'Family Priority List with Referral History'- summarizes referral data for those assessed through CE

Resources

ONESF Help Center Website

https://onesf.clarityhs.help/hc/en-us/articles/360015482654-Coordinated-Entry-Training-Materials-

Bitfocus Helpdesk

onesf@bitfocus.com

415.429.4211

Bitfocus