

Coordinated Entry

Family Access Point Training



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

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.

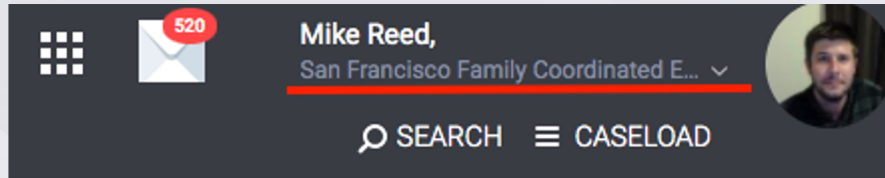
- ▶ Permanent Housing/Rapid Re-Housing (RRH)
- ▶ Family Shelter
- ▶ Family Transitional Housing

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.

Managed with Clarity Human Services

Recover deleted data

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).

flowers				SEARCH
Daisy Flowers	04/01/1999	1111		
Diasy Flowers	04/01/1999	1111		
Spring Flowers	06/17/1988	9922		Last Updated
Daisy Flowers	04/01/99	1111		04/01/19
Diasy Flowers	04/01/99	1111		09/05/19
Spring Flowers	06/17/88	9922		06/17/19

aged with Clarity Human Services

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.

SEARCH FOR A CLIENT

ADD CLIENT (+)

|

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

CREATE A NEW CLIENT

Social Security Number

- -

Quality of SSN

Select



Last Name



First Name

Quality of Name

Select



Quality of DOB

Select



Date of Birth

__/__/____

Middle Name

None



Gender

Select



Race

Select



Ethnicity

Select



Please fill in Release of Information form

CANCEL

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.

RELEASE OF INFORMATION

Permission	Yes	▼
Start Date	09/05/2019	25
End Date	09/05/2029	25
Documentation	<div>✓ Select Electronic Signature</div>	

ELECTRONIC SIGNATURE FORM

By completing this form, you are certifying the client:

- 1) was notified of the Department of Homelessness and Supportive Housing Notice of Privacy Policy
- 2) completed the Release of Information: Homeless Response System as required for the ONE System
- 3) reviewed the Release of Information: Human Service Agency.

Any signed Release of Information forms must be uploaded in client files.

SAVE

CANCEL

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.

The screenshot displays the Bitfocus web application interface. At the top, a dark navigation bar contains several tabs: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. The 'FILES' tab is highlighted with a red box and a red number '1' below it. Below the navigation bar, a blue header bar reads 'CLIENT FILES' and features an 'ADD FILE' button with a plus icon, which is also highlighted with a red box and a red number '2' below it. The main content area shows 'There are no results to display'. An 'UPLOAD A FILE' modal is open, showing the following fields: 'Category' (Homelessness Prevention Assistance), 'Predefined Name' (Documentation of Homelessness or), 'File' (with a 'Select File' button), and 'Private' (with a toggle switch). At the bottom of the modal are 'SAVE CHANGES' and 'CANCEL' buttons. The Bitfocus logo is in the bottom right corner.

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

CLIENT FILES

ADD FILE +

There are no results to display

UPLOAD A FILE

Category Homelessness Prevention Assistance

Predefined Name Documentation of Homelessness or

File Select File

Trouble attaching files? Switch to the Basic Uploader

Private

SAVE CHANGES CANCEL

Bitfocus

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.

Street Outreach Test, [TRAINING] ESG Agency

SEARCH CASELOAD

Household Members

Manage

No active members

1

HOUSEHOLD MANAGEMENT

Search for a Household Member

fall flowers Search for the family member here 2

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Client	Date of Birth	Last Four SSN	Last Updated
+ Add Fall Flowers	03/05/07	6565	10/21/19

Previous Household History for

Head of Household	Members	Start	End
-------------------	---------	-------	-----

2

ADD TO HOUSEHOLD

Select the relationship to the HoH

Member Type Daughter

Start Date 11/11/2019

SAVE

3

Managing Households

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

The screenshot illustrates the process of managing households in the Bitfocus system, divided into three numbered steps:

- Step 1:** The 'Household Members' section in the sidebar. A red arrow points to the 'Manage' button.
- Step 2:** The 'Household Members' table. A red arrow points to the 'Daughter' entry, which is associated with 'Springtime Flowerchild'.
- Step 3:** The 'EDIT GLOBAL HOUSEHOLD' modal. A red arrow points to the 'Exited Household' toggle switch, which is currently turned on (blue).

Contact and Location Information

Update Contact Information and Location

Contact Information

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

CLIENT CONTACTS

ADD CONTACT (+)

ADD CONTACT

Contact Type

Email

Phone (#1)

Phone (#2)

Active Contact

Private

Contact Date

Note

- Aunt/Uncle
- Case Manager
- Child
- ✓ Client
- Client- Work
- Client- Cell**
- Doctor
- Employer
- Emergency Contact
- Friend
- Grandparent
- Guardian
- Niece/Nephew
- Parent
- Sibling

More than one contact can be added Be sure to select a contact type from the drop down

Location

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

CLIENT LOCATION

ADD ADDRESS (+)

For mobile team, the arrow can be used to mark the exact location you met with the client.

ADD CLIENT LOCATION

Address Type Home

Name

Address (line 1)

Address (line 2)

City

State Alabama

Zip Code

Location Date

Active Location

Private

Note

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?

Eligibility Assessment

PROGRAM HISTORY

Program Name



Central City Access Point

[TRAINING] San Francisco Family Coordinated Entry Agency

Enrollment History **Assessments** Notes Files Forms

✕ Exit

Assessments

LINK FROM ASSESSMENTS

Family Eligibility Assessment

START

Family Housing Problem-Solving Assessment

Assessment Date

09/02/2020

25

Family Housing Prioritization Assessment

Shelter (Individual Room) Placement Criteria

SAN FRANCISCO HOMELESS FAMILY ELIGIBILITY A

Family Status

Select
Single
Couples with no children
✓ Adult with physical and legal custody of minor child(ren)
Pregnant Person in a household with one or more adults
Adult or couple currently in the family reunification process
Some of all rights in San Francisco

Where did you stay last night? Where did you stay for the last 7 nights?

Do you have children in school? If so, is the school in San Francisco?

Children in SF school system



Do you have any children in preschool or childcare?

Children in SF preschool or daycare



Is the family homeless?

Family is in unsheltered location or emergency shelter

ASSESSMENT HISTORY

=====

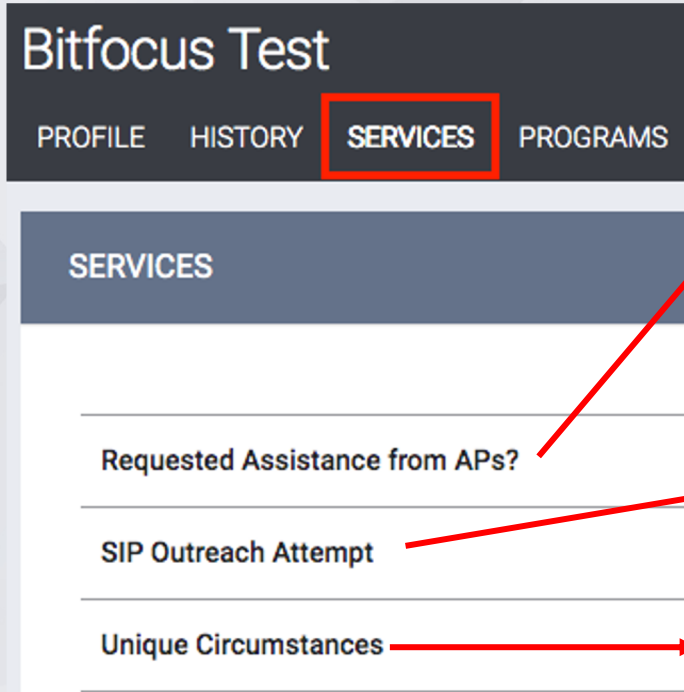
ELIGIBILITY ASSESSMENT RESULTS (NO RESPONSE NEEDED):

This is a San Francisco homeless family. Proceed to Family Housing Prob

=====

Pre-Enrollment Services

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



The screenshot shows the Bitfocus Test interface. At the top, there is a dark header with the text 'Bitfocus Test' and four tabs: 'PROFILE', 'HISTORY', 'SERVICES', and 'PROGRAMS'. The 'SERVICES' tab is highlighted with a red rectangular box. Below the header, there is a section titled 'SERVICES' in a dark blue bar. Under this section, there are three input fields: 'Requested Assistance from APs?', 'SIP Outreach Attempt', and 'Unique Circumstances'. Red arrows point from each of these fields to descriptive text on the right side of the slide.

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.

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.

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 access 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



0 % Families
100 % Individuals



Funding Source

Other (N/A)

Availability

Limited Availability

Service Categories:

✓ Housing Search and Placement
✓ Outreach Contact
✓ Other

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 

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 possible.

SAVE & CLOSE

CANCEL

 Audit Log

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.

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.

Current Living Situation Assessment

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

PROGRAM HISTORY

Program Name Start Date End Date Type



ECS: Bayview Access Point

[TRAINING] San Francisco Adult

PROGRAM: ECS: BAYVIEW ACCESS POINT

Enrollment History Provide Services **Assessments** Notes Files Forms

✕ Exit

Assessments

LINK FROM ASSESSMENTS

Current Living Situation

START

ADD PROGRAM ASSESSMENT



Pita Pocket


Grandchild

ADD CURRENT LIVING SITUATION

Current Living Situation Assessment

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

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 building)

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] ESC 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

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.

Problem Solving Screening

A Problem Solving Screening should be completed with every client.

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

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 ALL ANSWERS BELOW)

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 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”.

The screenshot displays a web form titled "Problem Solving Conversation" with a "Coordinated Entry Event" link in the top right. The form includes fields for "Start Date" and "End Date", both set to "09/15/2020" with calendar icons. Below these is a dropdown menu for "Result: Client housed/re-housed in a safe alternative:" with the text "-- Select --" and a downward arrow. A red underline is positioned beneath the "Result" label. The "Service Note" section features a text area with formatting icons (B, I, link, list) and a "SUBMIT" button at the bottom right.

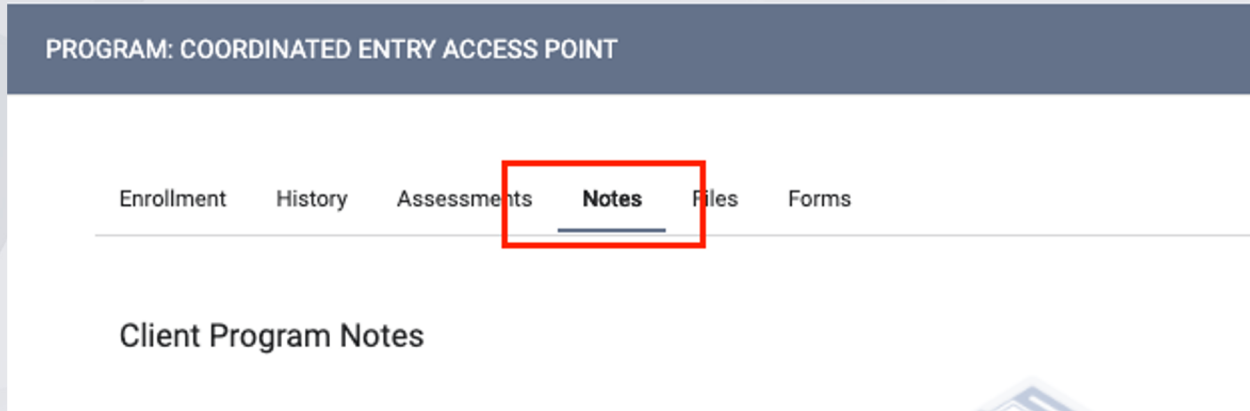
Not a Problem Solving Conversation

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.

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

- 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”

Problem Solving Services

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



Enrollment History **Provide Services** Assessments Notes Files Forms ✕ Exit

Services



Document Ready	Coordinated Entry Event ▼
Failed Housing Outreach Attempt	Coordinated Entry Event ▼
Housing Application	Coordinated Entry Event ▼
Prioritized by AP for Outreach	Coordinated Entry Event ▼
<u>Problem Solving Conversation</u>	Coordinated Entry Event ▼
<u>Problem Solving Financial Assistance</u>	Coordinated Entry Event ▼
<u>Problem Solving Housing Location Assistance</u>	Coordinated Entry Event ▼
<u>Problem Solving Mediation Services</u>	Coordinated Entry Event ▼
<u>Problem Solving Referral to another Problem Solving Resource</u>	Coordinated Entry Event ▼
Problem Solving_COVID19_Flex Fund Allowance	Coordinated Entry Event ▼
Refused Housing Referral	Coordinated Entry Event ▼
Successful Housing Outreach Attempt	Coordinated Entry Event ▼
Unique Circumstances	Other ▼

Problem Solving Financial Assistance Coordinated Entry Event ↗

Birth certificate or ID replacement costs to assist with housing access if no other source is available ^





Start Date: 09/15/2020  End Date: 09/15/2020 


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

Expense Amount: 0.00  Expense Date: 09/15/2020 

Funding Source: Whole Person Care ▼

Service Note

B I    



SUBMIT

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:
 - Homeward Bound
 - Eviction Prevention/Homelessness Prevention
 - 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.

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

≡

≡

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

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).

HISTORY			
Advanced Search Options View ▼			
Service Name	Start Date	End Date	
Referral: Community Queue [Training] Homeless Prenatal Program referral to Community Queue	11/04/2019	Pending	
[TRAINING] Hamilton Families Emergency Center [TRAINING] Hamilton Families	10/10/2019	Active	
Family Eligibility Assessment [TRAINING] San Francisco Family Coordinated Entry Agency		06/17/2019	
Shelter (Individual Room) Placement Criteria [TRAINING] San Francisco Family Coordinated Entry Agency		06/17/2019	
Family Housing Prioritization Assessment [TRAINING] San Francisco Family Coordinated Entry Agency	06/17/2019		
Family Housing Problem-Solving Assessment	06/17/2019		

Completing the Assessment in ONE

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

PROGRAM: BAYVIEW ACCESS POINT

Enrollment History **Assessments** Notes Files Forms

✕ Exit

Assessments

LINK FROM ASSESSMENTS

Family Eligibility Assessment

START

Family Housing Problem-Solving Assessment

START

Family Housing Prioritization Assessment

START

Shelter (Individual Room) Placement Criteria

START

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 or problem solving status.

PROGRAM ELIGIBILITY DETERMINATION

Fam Priority Score Summary

LIVING SITUATION AND HOUSING HISTORY	42	
HEALTH STATUS AND HISTORY	15	INCOME
CHRONIC HOMELESSNESS	15	

Fam Priority PRE-SCREEN TOTAL 75

☒ Permanent Housing/ RRH Community Queue

☐ SFHOT Stabilization Rooms

REFER DIRECTLY TO COMMUNITY QUEUES

Send to QueuesPermanent Housing/ RRH Community Queue

Referred ProgramCommunity Queue

Referred to AgencyCommunity Queue

Referring Agency[TRAINING] San Francisco Adult Coordinated Entry Agency

Private☐

B

I

≡

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SEND REFERRAL

CANCEL






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.

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

HISTORY


Advanced Search Options View ▾

Service Name	Start Date	End Date
 Referral: Community Queue Sara H. Agency 2 referral to Community Queue	 08/07/2019	09/04/2019 
Adult Primary CE Assessment [TRAINING] San Francisco Adult Coordinated Entry Agency		07/23/2019  
LYRIC Access Point	04/01/2019	04/01/2019

REMOVE FROM QUEUE

Reason for Removal

- Select Reason --
- Self Resolved
- Refused All Housing
- Whereabouts Unknown
- Deceased
- Reassessed
- Automated Removal
- ✓ Other**

Queue Removal Date 09/04/2019 

SAVE CHANGES **CANCEL**

SAVE CHANGES **CANCEL**

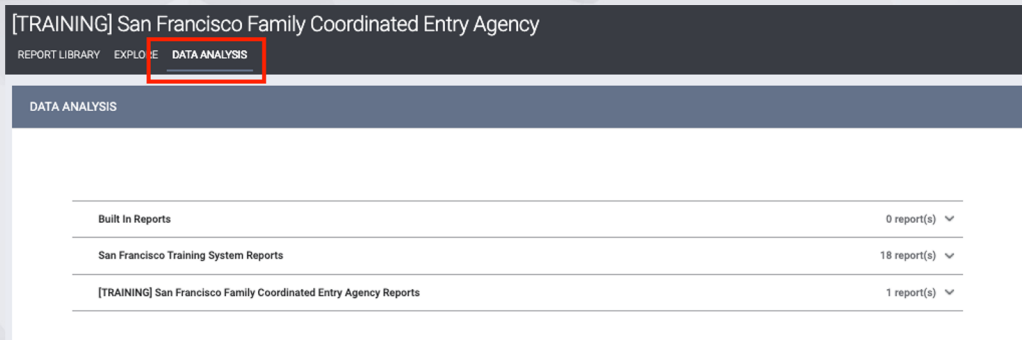
NOTES

The background of the image is a complex, abstract pattern composed of numerous overlapping triangles in various shades of light gray. The triangles vary in size and orientation, creating a dynamic, low-poly aesthetic. The overall effect is a textured, crystalline surface.

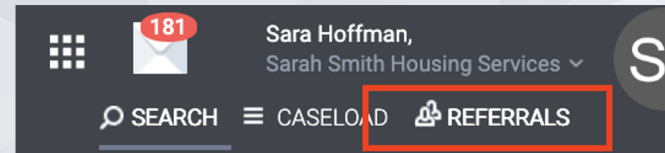
BREAK

Family Shelter Workflow

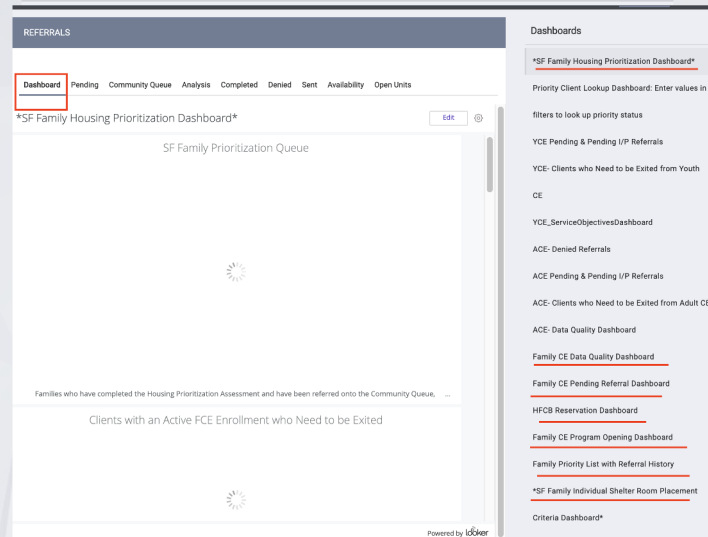
Accessing Dashboards in ONE



- 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



hes accessed:



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)



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.

Shelter Placement Criteria

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

The screenshot displays a web application interface. At the top, a dark navigation bar contains several tabs: PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted with a red box), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this, a blue header reads 'PROGRAM HISTORY'. The main content area shows a table of programs. The first program, 'Central City Access Point' (with a red box around its icon), is selected. Below the program name, a sub-navigation bar includes 'Enrollment', 'History', 'Provide Services', 'Assessments' (highlighted with a red box), 'Notes', 'Files', and 'Forms'. To the right of this bar is an 'X Exit' link. The 'Assessments' section lists four items: 'Current Living Situation' (green background), 'Family Housing Prioritization Assessment', 'Family Housing Problem-Solving Assessment', and 'Shelter (Individual Room) Placement Criteria' (grey background). Each item has a 'START' button to its right. The 'START' button for 'Shelter (Individual Room) Placement Criteria' is highlighted with a red box. A link labeled 'LINK FROM ASSESSMENTS' is located at the top right of the assessment list.

Program Name	Enrollment	History	Provide Services	Assessments	Notes	Files	Forms	Type
 Central City Access Point [TRAINING] San Francisco Family Coordinated Entry Agency								

Assessments

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

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.

Shelter Placement Criteria (cont.)

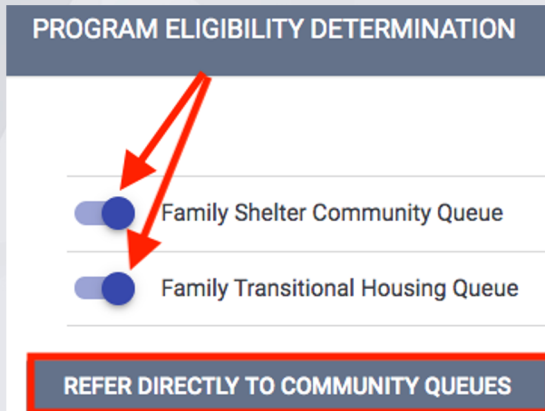
Family Status	Adult with physical and legal custody of minor child(ren)
How many people do you have in your immediate family that are in need of housing?	2 
How many of those individuals are under the age of 18?	1
Head of household age?	24
Family member #2's age?	3
Are you pregnant or is any household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

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

Referral to the Community Queue

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.

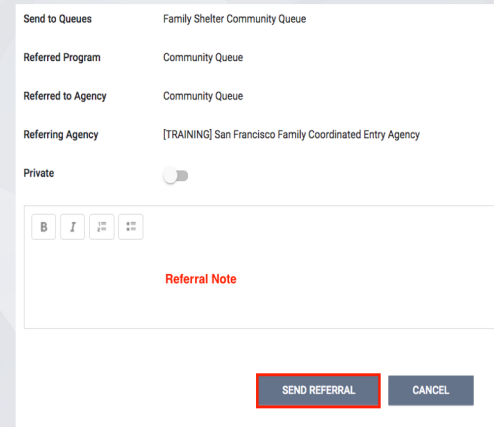


PROGRAM ELIGIBILITY DETERMINATION

☒ 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

☐

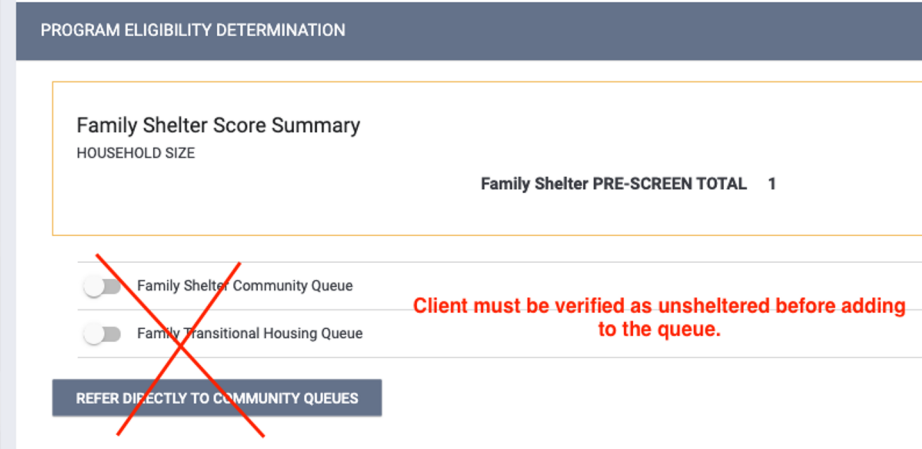
B I

Referral Note

SEND REFERRAL CANCEL

Shelter Placement Criteria (cont.)

- A family's Shelter Placement Criteria will be referred to the queue only after they have 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

REFER DIRECTLY TO COMMUNITY QUEUES

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



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

The screenshot displays the San Francisco Family Coordinated Entry Agency dashboard. At the top, the navigation bar includes 'Family CES', 'REPORT LIBRARY', 'EXPLORE', and 'DATA ANALYSIS'. The 'DATA ANALYSIS' tab is selected, indicated by a red arrow. Below the navigation bar, the 'San Francisco ONE System Reports' section is visible. A red arrow points to the '54 report(s)' dropdown menu. The reports list includes:

- *SF Family Housing Prioritization Dashboard* (RUN)
- *SF Family Individual Shelter Room Placement Criteria Dashboard*
- All Current Family CE Program Openings (RUN)
- CE Families Whose Referral on the Community Queue Expired (RUN)
- CE Families with Pending Referral to PH or RRH (RUN)
- Families Who Need to Be Verified Unsheltered (RUN)

A red arrow points to the 'Families Who Need to Be Verified Unsheltered' report. On the right side, a sidebar menu is open, showing options: SETUP, MANAGE, REPORTS, CALENDAR, MERGE, and DATA IMPORT. A red arrow points to the 'REPORTS' option in the sidebar.

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.

Enrollment History Provide Services **Assessments** Notes Files Forms ✕ Exit

Assessments LINK FROM ASSESSMENTS


Current Living Situation	START
Family Eligibility Assessment	START
Family Housing Prioritization Assessment	START
Problem Solving Screening	START
Shelter (Individual Room) Placement Criteria	START

ASSESSMENT HISTORY

Advanced Search Options View ▾

Assessment Name	Completed	Details
<input checked="" type="checkbox"/> Shelter (Individual Room) Placement Criteria Demo Agency ⓘ	10/15/2020	Family Shelter: 1 ELIGIBILITY
Problem Solving Screening		

Does this family need to be verified unsheltered? ☐ ← Turn off

Has this family been verified unsheltered by SFHOT or Access Point Outreach Teams? ☒ Verified Unsheltered Date 10/15/2020 

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.

The screenshot shows a web application interface with a top navigation bar containing links for Enrollment, History, Provide Services, Assessments (highlighted with a red box), Notes, Files, and Forms. Below the navigation bar is a section titled 'Assessments' which lists several assessment types: Current Living Situation (highlighted in light green), Family Eligibility Assessment, Family Housing Prioritization (Primary) Assessment, Problem Solving Screening, and Shelter (Individual Room) Placement Criteria. Below this list is a dark blue header for 'ASSESSMENT HISTORY'. Underneath is an 'Advanced Search Options' section with a 'View' dropdown. At the bottom is a table with three columns: 'Assessment Name', 'Completed', and 'Details'. The table contains one row for 'Shelter (Individual Room) Placement Criteria [TRAINING] San Francisco Family Coordinated Entry Agency' with a completion date of '11/04/2020'. In the 'Details' column, there is a button labeled 'Family Shelter: 1' and a red box containing the text 'ELIGIBILITY'.

Assessment Name	Completed	Details
Shelter (Individual Room) Placement Criteria [TRAINING] San Francisco Family Coordinated Entry Agency ⓘ	11/04/2020	Family Shelter: 1 ELIGIBILITY

Referring to Family Shelter and Transitional Housing Queues

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

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 100 200 300 400

Referral Note

SEND REFERRAL

CANCEL

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.

[TRAINING] San Francisco Family Coordinated Entry Agency

REPORT LIBRARY EXPLORE **DATA ANALYSIS**

DATA ANALYSIS

Built In Reports 0 report(s) ▼

San Francisco Training System Reports 18 report(s) ▼

[TRAINING] San Francisco Family Coordinated Entry Agency Reports 1 report(s) ▼

SEARCH CASELOAD **REFERRALS**

REFERRALS

Dashboard Pending Community Queue Analysis Completed Denied Sent Availability Open Units

HFCB Reservation Dashboard [Set](#)

Verify Unsheltered Families Eligible for Placement at HFCB (V2)

Client Full Name	Unique Identifier	Shelter Placement Criteria Creation Date	Assessment Date within Shelter Criteria (Range Family Active on LHM)	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?	Head of household age?	Family member #1's age?	Family member #2's age?	Family member #3's age?	Family member #4's age?	Family member #5's age?	Family member #6's age?	Family member #7's age?	Family member #8's age?

Dashboards

SF Family Housing Prioritization Dashboard

Priority Client Lookup Dashboard: Enter values in filters to look up pr status

YCE Pending & Pending LP Referrals Dashboard

YCE: Clients who Need to be Exited from Youth CE

YCE_ServiceObjectivesDashboard

ACE: Denied Referrals

ACE Pending & Pending LP 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

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	Multiple 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

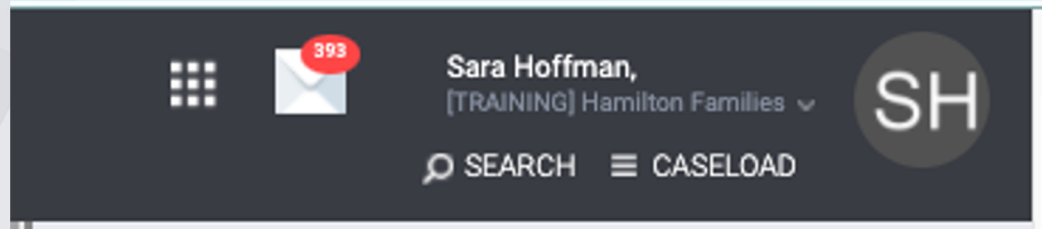
		Reservation Date  >								
Slot Number ^	Room/Bed Description	Bed #	Reservation Status	Reservation Status	Reservation Status	Reservation Status	Reservation Status	Reservation Status	Reservation Status	
2	COVID-19 Offline Beds 3&4: Room 401(Beds1-4): Children must be at least 6yrs old to sleep in top bunk	2 (Bottom)	RESERVED	RESERVED	RESERVED	RESERVED	RESERVED	RESERVED	RESERVED	
3	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	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	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	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	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.

Reserving Beds at HFCB

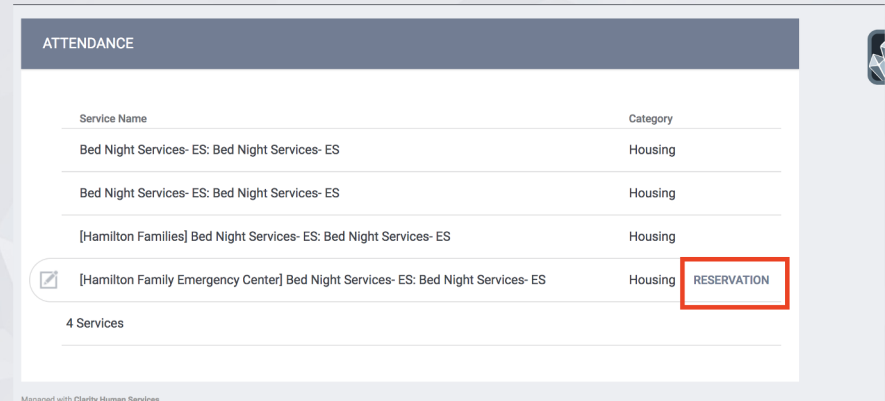
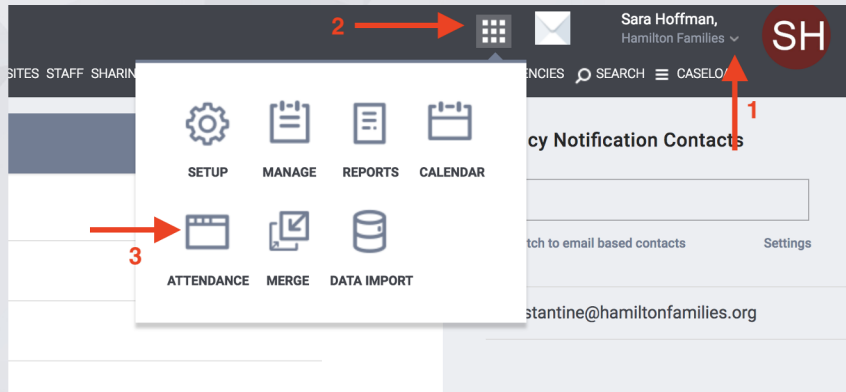
Switching Agencies

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.

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	4623	04/07/1978	PRESENT
2 (Bottom)	Andrew Roarty	9272	08/24/1974	RESERVED
3 (Top)	Annabel Test	0000	10/14/1927	NO SHOW
4 (Bottom)				

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	PRESENT
4 (Bottom)				

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

CALENDAR VIEW

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.

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

1 (Top)
Grape Vine
No Active Enrollment

2 (Bottom)
Andrew Roarty

3 (Top)
Annabel Test

4 (Bottom)

	Slot	Client	Last 4 SSN	Date	
1	1 (Top)	Grape Vine	4623	04/07/1978	PARENT
2	2 (Bottom)	Andrew Roarty	9272	08/24/1974	RESERVED
3	3 (Top)	Annabel Test	0000	10/14/1927	NO SHOW

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

2 (Bottom)
Atticus Finch
No Active Enrollment

4 (Bottom)

	Slot	Client	Last 4 SSN	Date	
5	2 (Bottom)	Atticus Finch	5643	01/01/1945	PARENT

Slot: 4 - 4 (Bottom)

Check-in Date: May 7, 2018

Days to Reserve: 60

Client:

SEARCH FOR CLIENT

CALENDAR VIEW

MAKE RESERVATION

Slot: 4 - 4 (Bottom)

Check-in Date: May 7, 2018

Days to Reserve: 60




Client: Johnny Test Test 1



CHANGE

PREVIEW RESERVATION

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.

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

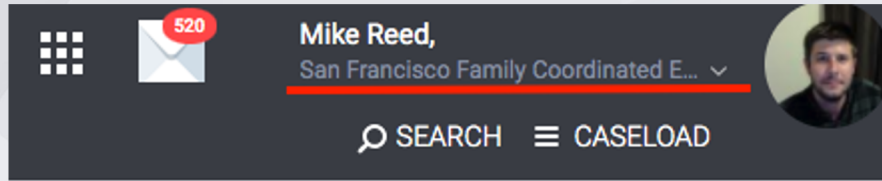
 



Scheduling Intake Appointments

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	0
2018-05-07	1	0	0	0	1
2018-05-08	0	1	0	0	1
2018-05-11	0	0	1	1	1

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

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.

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

PROGRAM: BAYVIEW ACCESS POINT

Enrollment History **Provide Services** Assessments Notes Files Forms ✕ Exit

Services

CE_COVID19_Transition from Hotel to Shelter	Coordinated Entry Event ▾
COVID-19 Allowance for Housing Referral Status Families	Financial ▾
Document Ready	Coordinated Entry Event ▾
FCE_COVID19_Direct Services	Case Management ▾
FCE_COVID19_Transportation Shuttle Service	Transportation ▾
Housing Application	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 ▾
Schedule Appointment With Hamilton Family Congregate Beds (HFCB)	Case Management ▾

Schedule Appointment With Hamilton Family Congregate Beds (HFCB)

Case Management ▾

Appointment with HFCB at 10 AM ▾

Appointment with HFCB at 2 PM ▾

Appointment with HFCB at 5 PM ▾

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		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
Testy											Appointment with HFCB

Individual Room Shelter

Identifying Families for Individual Room Shelter

- The *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.

Dashboard Pending Community Queue Analysis Completed Denied Sent Availability Open Units

SF Family Individual Shelter Room Placement Criteria Dashboard

Individual Room Shelter Placement

Individual Room Shelter Placement List (V4)

Host Name	Host Unique Identifier	Shelter Placement Criteria	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	Family Members #3	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

Priority Client Lookup Dashboard: Enter values in filters to look up priority

status

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

Family Priority List with Referral History

SF Family Individual Shelter Room Placement Criteria Dashboard

Denial of Service

Review the orange *Active Denial of Service* column to see if the client has any documented denial of services.

Individual Room Shelter Placement

Individual Room Shelter Placement List (V5)- Train

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 housing?	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 Member #10's Ages	Denial of Service Count	Enrollments After Shelter Placement Criteria	Total Time in Shelter or Verified Unsheltered
1. Onyx Test	35266R209	2020-03-20	2020-03-20	Yes	2020-03-20	2	1	Yes	2020-05-14	30	1	0	1	210.0

- 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.

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. Rosemary Rob	7B61227BF	[TRAINING] Hamilton Families	No DoS Recorded	⊗	⊗	2020-10-13	⊗	0	⊗	⊗
2. Spring Flowers	0B7E83B1D	[TRAINING] Hamilton Families	No DoS Recorded	⊗	⊗	2020-10-30	⊗	0	⊗	⊗

The background of the image is a complex, abstract pattern composed of numerous overlapping triangles in various shades of light gray. The triangles vary in size and orientation, creating a dynamic, low-poly aesthetic. The overall effect is a textured, crystalline surface.

BREAK

Matchmaking: Program Openings

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	<ul style="list-style-type: none">• Open Units Tab	Show shelter and housing openings for all populations
Current Family CE Shelter Program Openings	<ul style="list-style-type: none">• Dashboard Tab (on the SF Family Individual Shelter Room Placement Criteria Dashboard)	Family shelter openings
All Current Family CE Program Openings Report	<ul style="list-style-type: none">• Data Analysis• Dashboard Tab	Family shelter and housing openings

Program Openings

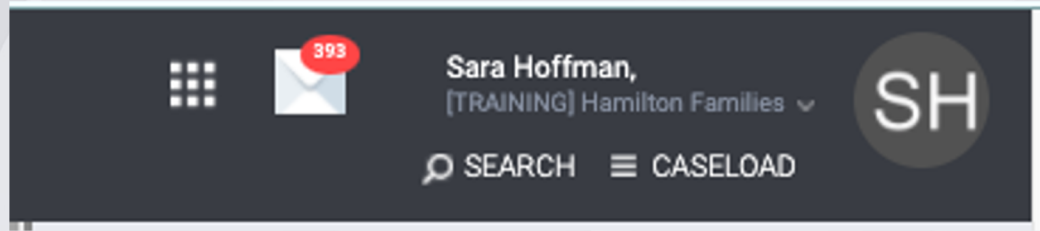
- Current Family CE Shelter Program Opening reports is the easiest place to look for shelter openings.

Name of Report	Location of Report	What the Report Shows
Open Units Report	<ul style="list-style-type: none">• Open Units Tab	Show shelter and housing openings for all populations
Current Family CE Shelter Program Openings	<ul style="list-style-type: none">• Dashboard Tab (on the SF Family Individual Shelter Room Placement Criteria Dashboard)	Family shelter openings
All Current Family CE Program Openings Report	<ul style="list-style-type: none">• Data Analysis• Dashboard Tab	Family shelter and housing openings

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*.

The screenshot displays the Raphael House web application interface. On the left, the 'REFERRALS' sidebar shows the 'Availability' tab selected. The main content area is divided into two panels. The left panel, titled 'Program Availability', shows a list of programs with 'Residential Shelter Program' selected, and tabs for 'FULL AVAILABILITY', 'LIMITED AVAILABILITY', and 'NO AVAILABILITY'. The right panel, titled 'Residential Shelter Program', shows a list of 'AVAILABLE OPENINGS' and a 'RESERVED OPENINGS' section. A red arrow points to the 'NO AVAILABILITY' tab in the top right corner of the 'Residential Shelter Program' panel. Below the 'AVAILABLE OPENINGS' list, a form displays various attributes for the selected opening, including 'Unit Size', 'Minimum Household Size', 'Maximum Household Size', 'What floor is the unit on?', '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', and 'MHSA'. The 'Access Point Staff Responsible for Filling Opening' field is highlighted with a red box. At the bottom right, there are 'SAVE CHANGES' and 'CANCEL' buttons.

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

Residential Shelter Program

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
8 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

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.

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.

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.

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.

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

Matchmaking (Permanent Housing, RRH or Transitional Housing)

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

The screenshot displays the 'REFERRALS' dashboard. At the top, a navigation bar includes links for Dashboard, Pending, **Community Queue** (labeled 1), Analysis, Completed, Denied, Sent, Availability, and Open Units. Below this, the 'Community Queue' section features four tabs: **Permanent Housing/ RRH Community Queue** (labeled 2), Family Shelter Community Queue, Family Transitional Housing Queue, and SFHOT Stabilization Rooms. The main search area contains several filters: 'Active Agency' (labeled 3) with a dropdown showing 'Housing Test Agency'; 'Project' (labeled 5) with a dropdown showing 'Evergreen PSH'; 'Eligible Clients Only' (labeled 4) with a toggle switch; 'Mode' (labeled 6) with a dropdown showing 'SF Homeless Family Priority Assessment'; 'Characteristic' with a dropdown showing '-- Select --'; 'Score Range' with a dropdown showing '-- All Ranges --'; and 'Sort By' with a dropdown showing 'Default'. A 'SEARCH' button (labeled 7) is located at the bottom right.

Matchmaking

Once the client has been identified, make the referral.

Active Agency

Housing Test Agency

▼

Project

Evergreen PSH

▼

☒ Eligible Clients Only

Characteristic

-- Select --

▼

Score Range

-- All Ranges --

▼

Sort By

Default

▼

SEARCH

Client	Referral Date	Days Pending	Score
<div><input checked="" type="checkbox"/></div> <div>Milk Shake</div> <div>Referred by: [TRAINING] HSH: SFHOT ⓘ</div>	<div>📅</div> 02/27/2020	189	117 <div>🖨</div>
<div>Snarf Thundercat</div> <div>Referred by: [TRAINING] San Francisco Youth Coordinated Entry Agency ⓘ</div>	<div>📅</div> 08/07/2019		
<div>Test Demo</div> <div>Referred by: Housing Test Agency ⓘ</div>	05/20/2020		

RE-ASSIGN

Program

-- Select Program --
✓ Residential Shelter Program

Opening

09/10/2020 Joanna Garcia. Phone ir▼

SAVE CHANGES

CANCEL

Assigning a Navigator

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

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 CHECK-IN
Referred by Staff	Jon Hoskins ⓘ
Navigator	ASSIGN 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.

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.

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

Program Opening V2 Run

FILTERS (3) Agencies Agency Name is "Sara's Test Agency" or "Housing Test Agency" or "Sarah Smith Housing Services" or "Sara H. Agency 2" Program Openings Open Referrals is 0 Program Openings Opening Filled / Deleted (Yes / No) is No

VISUALIZATION

Agency Name ^	Name	ID	Date Date	Description	Project Type Code	Note	Eligibility	Unit Details (Calculation)	Population (toggles)
1 Housing Test Agency	Evergreen PSH	237	2019-02-06		PH - Permanent Supportive Housing (disability required)	Tina Test Opening #1			
2 Housing Test Agency	Evergreen PSH	242	2019-04-17		PH - Permanent Supportive Housing (disability required)	Unit 1A This unit is dedicated for individuals with a mental health disability. Please only refer individuals who meet that criteria.		Unit Number 1A; 1; Max 2 people; Floor Number 1; Has Elevator; Adult;	Single Adult
3 Housing Test Agency	Evergreen PSH	389	2019-10-15		PH - Permanent Supportive Housing (disability required)			Unit Number 4A; Studio; Max 2 people; Floor Number 3; Has Elevator; Adult;	Single Adult
4 Housing Test Agency	Evergreen PSH	390	2019-10-15		PH - Permanent Supportive Housing (disability required)	4B		Unit Number 4B; Studio; Max 2 people; Floor Number 3; Has Elevator; Adult;	Single Adult
5 Housing Test Agency	Evergreen PSH	391	2019-10-15		PH - Permanent Supportive Housing	4A		Unit Number 4A; Studio; Max 2 people; Floor Number 3; Has Elevator; Adult;	Single Adult

Tracked Characteristics

Active Agency

Housing Test Agency

▼

Project

Evergreen PSH

▼

☒ Eligible Clients Only

Characteristic

Score Range

Sort By

✓ -- Select --

Address

Chron A

Disability

HIV/AIDS

HSP Eligibility

Mental Health or Substance Use

MHSA- FSP

Nursing Support

Referred for Clinical Review

Shared Priority Pilot

Training- Mental Health

Trans Youth

Vets

Client

Referral Date

Milk Shake

Referred by: [TRAINING] HSH: SFHOT ⓘ

02/27/2020

189

117

Snarf Thundercat

Referred by: [TRAINING] San Francisco Youth Coordinated Entry Agency ⓘ

08/07/2019

394

72



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

Removal from the ES/TH Queue

PROFILE	HISTORY	SERVICES	PROGRAMS	ASSESSMENTS	NOTES	FILES	CONTACT	LOCATION	REFERRALS
HISTORY									
Advanced Search Options View ▼									
Service Name		Start Date		End Date					
 Referral: Community Queue Sara H. Agency 2 referral to Community Queue		 08/07/2019		09/04/2019					
Adult Primary CE Assessment [TRAINING] San Francisco Adult Coordinated Entry Agency		07/23/2019							
LYRIC Access Point		04/01/2019		04/01/2019					

REMOVE FROM QUEUE

Reason for Removal

-- Select Reason -- ▼

Queue Removal Date

09/03/2020



SAVE CHANGES

CANCEL

Services

Services

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

Enrollment	History	Provide Services	Assessments	Notes	Files	Forms	✕ Esc
Services							
Accepted Reservation at Congregate Shelter			Other ▾				
CE_COVID19_Transition from Hotel to Shelter			Coordinated Entry Event ▾				
Congregate Shelter Placement Outreach			Other ▾				
Declined Offer of Congregate Shelter: Hamilton Families			Other ▾				
Document Ready			Coordinated Entry Event ▾				
FCE_COVID19_Direct Services			Case Management ▾				
FCE_COVID19_Intake Shelter in Place Hotel			Housing Search and Placement ▾				
FCE_COVID19_Transportation Shuttle Service			Transportation ▾				
Housing Application			Coordinated Entry Event ▾				
Housing Outreach Attempt			Coordinated Entry Event ▾				
Individual Room Shelter Placement Outreach			Housing Search and Placement ▾				
Other Outreach Attempt			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 ▾				
Requested Assistance from APN?			Case Management ▾				
Schedule Appointment With Hamilton Family Congregate Beds (IFCB)			Case Management ▾				
Unique Circumstances			Other ▾				

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

CE_COVID19_Transition from Hotel to Shelter Coordinated Entry Event ▾

Congregate Shelter Placement Outreach Other ▴

Failed Outreach Attempt ▾

Successful Outreach Attempt ▾

Declined Offer of Congregate Shelter: Hamilton Families Other ▾

Services

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


Document Ready

Coordinated Entry Event

Required Documents Posted for Housing Referral


Start Date:

10/12/2020



End Date:

10/12/2020



Service Note

B

I

1/10

2/10

3/10

4/10

SUBMIT

Required Documents Posted for Shelter Referral

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.

[Dashboard](#) [Pending](#) [Community Queue](#) [Analysis](#) [Completed](#) [Denied](#) [Sent](#) [Availability](#)

Community Queue

Permanent Housing/ RRH Queue

Family Shelter Community Queue

Fa

Search

Active Agency


Sara H. Agency 2

▼

☐

Eligible Clients Only

Client



Juliet Mendoza

Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency ⓘ

Snarf Thundercat

REFERRAL: ASSIGN

Client	Juliet Mendoza
Previous Referred Program	Evergreen PSH
Previous Referred to Agency	Housing Test Agency
Referring Agency	[TRAINING] San Francisco Adult Coordinated Entry Agency
Referred Date	12/13/2018 4:21 PM
Days Pending	683 day(s)
Qualified	Reassigned
Last Activity	07/31/2020 <div>CHECK-IN</div>
Referred by Staff	Ja Guerrero Huh ⓘ
Navigator	<div>ASSIGN NAVIGATOR</div>
Private	<div><input type="checkbox"/></div>

SAVE CHANGES

CANCEL

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.

The screenshot displays the ONE system interface. At the top, a dark navigation bar contains links: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES (highlighted with a red box and a red '1' below it), CONTACT, LOCATION, and REFERRALS. Below this, a light blue header bar shows 'CLIENT FILES' on the left and 'UPLOAD A FILE' in the center. The main content area is split into two columns. The left column shows a message: 'There are no results to display'. The right column contains the upload form with the following fields: 'Category' (dropdown menu showing 'Background Check'), 'Predefined Name' (dropdown menu showing 'Credit, Criminal, and/or Eviction-TV'), 'File' (with a 'Select File' button), and 'Private' (with a toggle switch). Below the 'File' field is a link: 'Trouble attaching files? Switch to the Basic Uploader'. At the bottom right of the form are two buttons: 'SAVE CHANGES' and 'CANCEL'. Red text annotations provide instructions: 'Select a category and a predefined name from the drop downs.' points to the first two dropdowns; 'Click Select file and then chose the file from your computer you need to upload.' points to the 'Select File' button; and 'Click Save' points to the 'SAVE CHANGES' button.

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

CLIENT FILES 1

UPLOAD A FILE

There are no results to display

Category Background Check ▼

Predefined Name Credit, Criminal, and/or Eviction-TV ▼

File [Select File](#)

[Trouble attaching files? Switch to the Basic Uploader](#)

Private ☐

[Click Save](#)

[SAVE CHANGES](#) [CANCEL](#)

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.

REMOVE FROM QUEUE

Reason for Removal	Self Resolved	▼
Queue Removal Date	09/04/2020	📅

✓ Select

Housed with Community Inventory - Not with CE

Housed with RRH - Not with CE

Permanently Living with Family/Friends

Rental By Client

Return To Prior Residence


SAVE CHANGES

CANCEL

Exits

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

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

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	

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

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:

Age Range	# of Clients	Chronic Homeless	# of Clients
Under 5	0	No	0
5 - 12	0	Yes	0
13 - 17	0	Clients Entering from Homelessness	# of Clients
18 - 24	0	Yes	0
25 - 34	0	No	0
35 - 44	0	Approximate Date Started	# of Clients
45 - 54	0	365 Days or More	0
55 - 61	0	Less Than 365 Days	0
62+	0	Missing	0
No Answer	0	Not applicable	0
Total	0	Times Homeless in the Past Three Years	

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

Race Demographic	# of Clients	Total Months Homeless in the Past Three years
American Indian or Alaska Native	0	One month (this time is the first month)
Asian	0	Two Months
Black or African American	0	Three Months
Native Hawaiian or Other Pacific Islander	0	
White	0	

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

CE Assessing Staff Report										Bitfocus Coordinated Entry Agency				
										08/01/2020 - 10/02/2020				
Kadra Adlerly: **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
08/25/2020	Test, Spot	8ABD7994E	24	Female	No	Without Children	1	0	CE- Housing Assessment	49		No	Bitfocus Coordinated Entry Agency	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

San Francisco Family Coordinated Entry Agency

REPORT LIBRARY EXPLORE DATA ANALYSIS

REPORT LIBRARY

Administrator Reports

8

Agency Management

4

Assessment Based Reports

4 report(s) ▾

Community and Referrals

7 report(s) ▾



SETUP



MANAGE



REPORTS



CALENDAR



MERGE

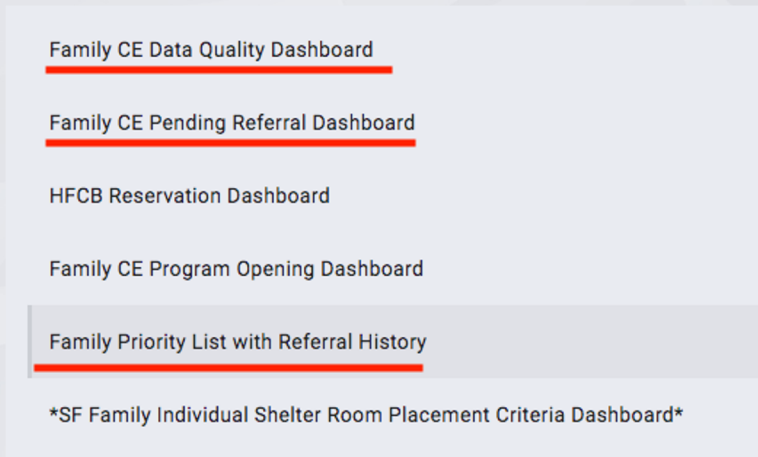
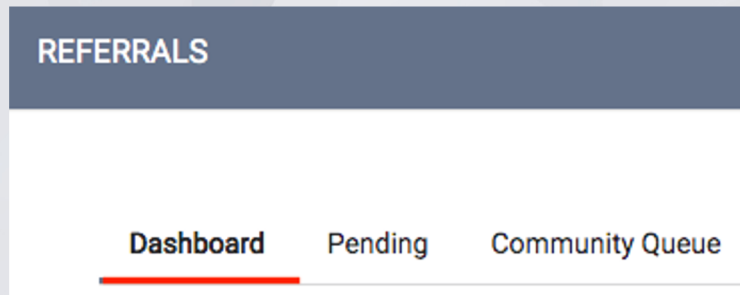


DATA IMPORT

No reports

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

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