



DEPARTMENT OF  
HOMELESSNESS AND  
SUPPORTIVE HOUSING

# Adult Housing Navigation & Placement Workflow Training

Housing Navigation Team Activities

June 7, 2023



# Goals for today

- By the end of this session, we'll have a shared understanding of:
  - Why we're launching this new workflow
  - The key steps in the overall workflow
  - How to perform the Navigation Team Workflow Activities in ONE
  - How the adult unit refusal protocol will be tracked in ONE
  - The implementation timeline
  - How to get help if you have questions

# Why do we need a new workflow?



## • To improve current workflow practices

- Need a post-SIP “new normal” workflow based on what we’ve learned from the SIP Rehousing period and current needs
- Want to level set on new workflow that will be consistently followed and more accurately reflect where clients are in the housing navigation and placement process

## • Offline Vacancy Tracker (OVT) is being retired

- OVT will become read-only on June 7<sup>th</sup> as part of Phase 3 of the Housing Unit Inventory project; all unit statuses will be tracked in ONE as of June 12<sup>th</sup>
- Can no longer use the OVT to identify units available for what used to be called “batch referrals” (transitioning to calling them *provider level referrals*)

## • New Unit Refusal Protocol

- Opportunity to streamline unit refusal tracking (using referral denial reasons)
- Can retire old method of tracking unit refusals and exemptions by logging services in ONE

# Adult Housing Navigation & Placement Workflow

## Key: Who Performs Activity



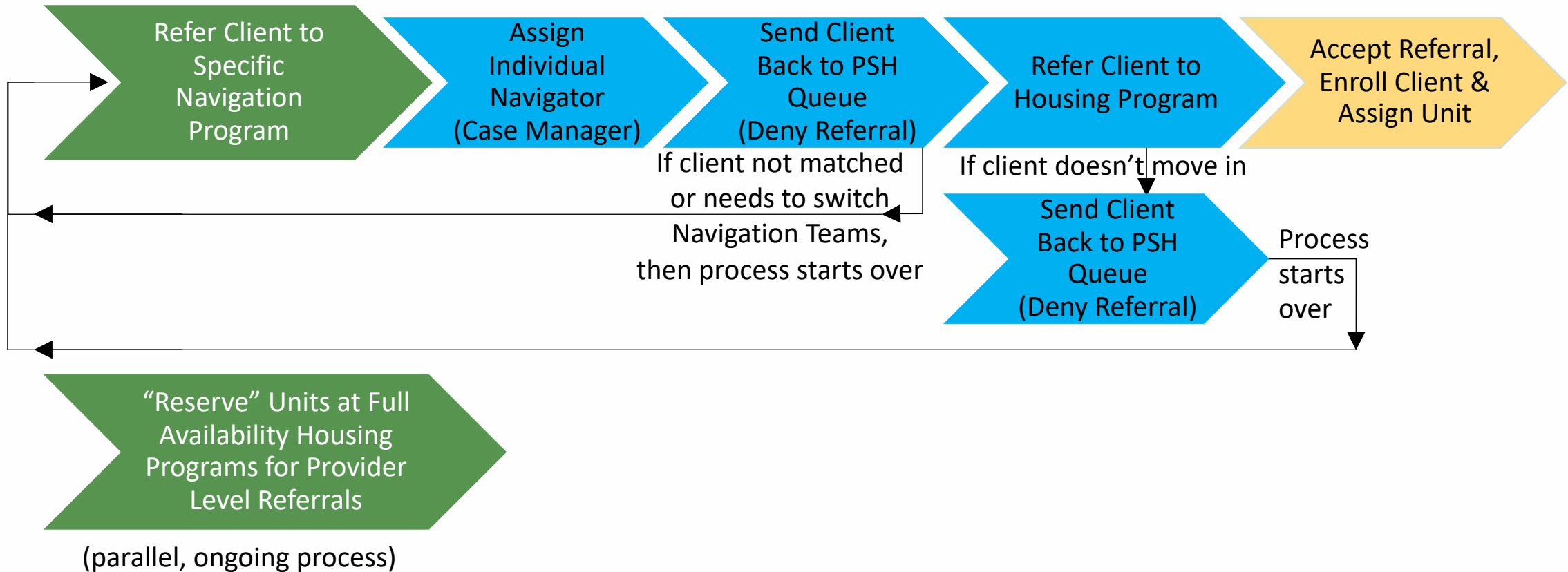
Housing  
Placement Team



Navigation  
Teams



Housing  
Providers





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# How to identify clients currently active with each Navigation Team

# Adult Housing Navigation Programs Dashboard

- This is a custom dashboard you can use to see who is active with each of the navigation programs.
- You can see which program is navigating the client, when the referral was made to the navigation program, the navigator assigned and the status of the referral.
- You can also click the "Link to ONE profile" to go straight to the client's profile.

## Department of Homelessness and Supportive Housing

[REPORT LIBRARY](#)[EXPLORE](#)[DATA ANALYSIS](#)

Paul Devencenzi,  
Department of Homelessness and ...

SEARCH CASELOAD

### Adult Housing Navigation Programs Dashboard

just now

Housing Navigation Program

Status

is Housing Navigation: Dolores Street or Hou...

is Pending - In Process or Pending

#### Total Counts

Housing Navigation Program	Count of Clients
Housing Navigation: Dolores Street	1
Housing Navigation: ECS	1
Housing Navigation: Pretrial Diversi...	1
Housing Navigation: SFHOT	1

#### Client-Level Data for Adult Housing Navigation Programs

	Housing Navigation Program	Client Name	Unique Identifier	Link to ONE Profile	Date of Referral	Case Manager	Referral Status
1	Housing Navigation: Dolores Street	Bitfocus Test 2	6D1065483	102370 ...	2023-05-24	Candace Thomsen	Pending
2	Housing Navigation: ECS	Bitfocus Test	DF4A43BD9	73916 ...	2023-05-24	Cody Reneau	Pending
3	Housing Navigation: Pretrial Diversion Project	Bitfocus Tinytest	0552D3D4D	84044 ...	2023-05-25		Pending
4	Housing Navigation: SFHOT	Covid-19 Hold Tbd	571C2CDC7	80008 ...	2023-05-25		Pending



# Making a Referral from the Community Queue: Client Profile/History

- You can view the referral from the client's profile or history tab.
- It will say "Program Referral" underneath their UI/Photo.
- Click on "View Details" to return to the referral screen.
- You can also view the referral on the client's "History" tab.
- It will be organized in the history tab by the date they were **added to the Community Queue**.
- Click the pencil icon to return to the referral screen.

Joshua Tree

PROFILE HISTORY SERVICES PROGRAMS NOTES FILES CONTACT LOCATION REFERRALS ASSESSMENTS

CLIENT PROFILE

Social Security Number XXX - XX - 9857

Quality of SSN Full SSN Reported

Last Name Tree

First Name Joshua

Quality of Name Full name reported

Quality of DOB Full DOB Reported

Date of Birth 05/03/1989

Adult Age: 34

Suffix None

UNIQUE IDENTIFIER 3710FC825

PROGRAM REFERRAL

Client has a pending program referral.

VIEW DETAILS

Joshua Tree

PROFILE HISTORY SERVICES PROGRAMS NOTES FILES CONTACT LOCATION REFERRALS ASSESSMENTS

HISTORY

Advanced search options View

Service Name	Start Date	End Date
Emergency Housing Voucher Preliminary Eligibility Assessment [TRAINING] Department of Homelessness and Supportive Housing		02/08/2022
Referral to RRH project resource opening:Referral to RRH project r... [TRAINING] San Francisco Adult Coordinated Entry Agency	01/05/2021	01/05/2021
Reservation: [Hamilton Family Emergency Center] Test Bed Night ... [TRAINING] Hamilton Families	12/11/2020	12/11/2020
[Hamilton Family Emergency Center] Test Bed Night Services- ES: ... [TRAINING] Hamilton Families	12/11/2020	12/11/2020
Referral: Housing Navigation: ECS [TRAINING] San Francisco Adult Coordinated Entry Agency referral to [TRAINING] San Francisco Adult Coordinated Entry Agency	09/17/2020	Pending



REFERRAL: EDIT

ClientJoshua Tree

Referred ProgramHousing Navigation: Dolores Street

Referred to Agency[TRAINING] San Francisco Adult Coordinated Entry Agency

Referring Agency[TRAINING] Department of Homelessness and Supportive Housing

Referred Date06/06/2023 4:54 PM

Days Pending0 day(s)

In Process0 day(s)

QualifiedReassigned

Adult Priority score63

Referred by StaffPaul Devencenzi ⓘ

Case ManagerSelect

Last Activity06/06/2023CHECK-IN

StatusPending

Private

SAVE CHANGES

CANCEL

SEND NOTE

HISTORY

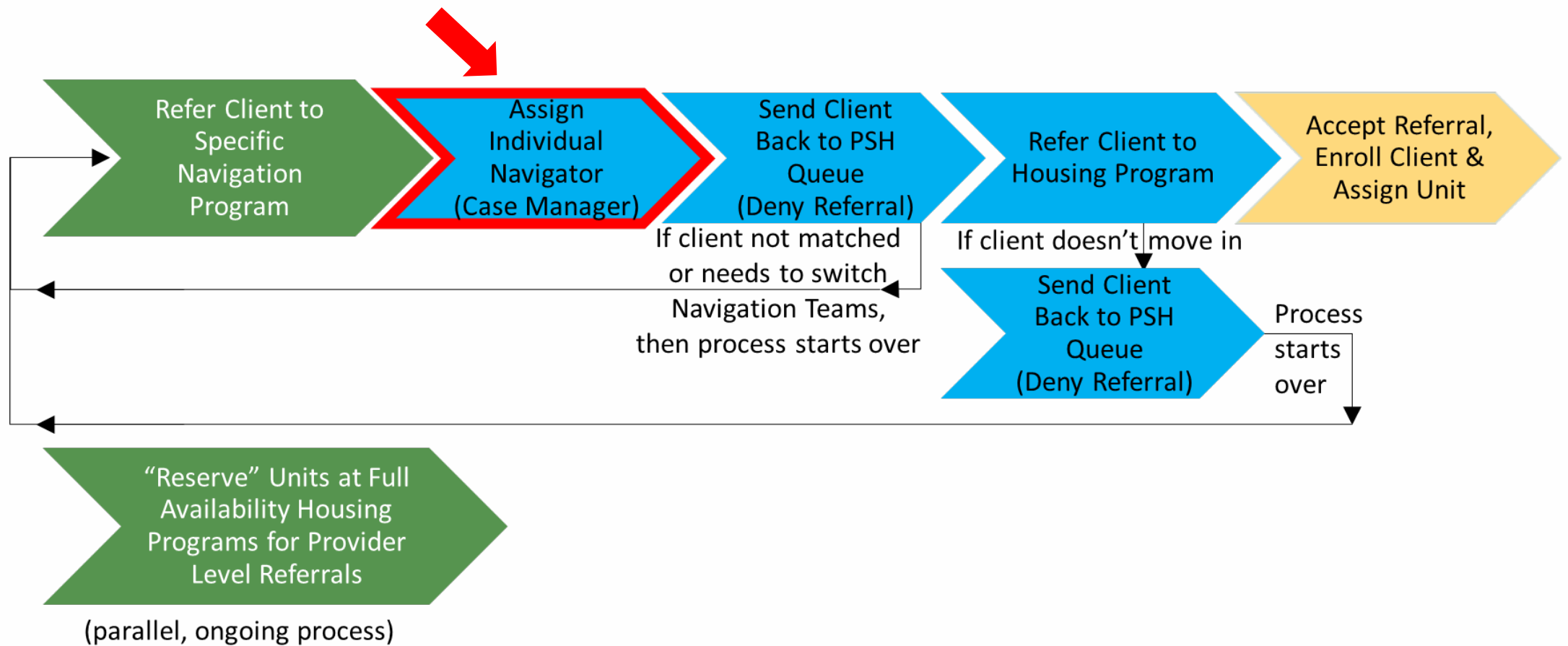
Activity	Date	Days Pending	Staff
Program Referral: Housing Navigation: ECS, [TRAINING] San Francisco Adult Coordinated Entry Agency	05/22/2023 2023-05-22 02:00:26	0	Paul Devencenzi [TRAINING] San Francisco Adult Coordinated Entry Agency ⓘ
Expired: Reassigned to Community Queue: Permanent Supportive Housing Queue	05/22/2023 2023-05-22 01:47:02	0	Paul Devencenzi [TRAINING] Bayview Hunters Point Foundation for Community Improvement ⓘ
Program Referral: Arlington Residence - LOSP, [TRAINING] Bayview Hunters Point Foundation for Community Improvement	05/22/2023 2023-05-22 01:46:20	11	Paul Devencenzi [TRAINING] San Francisco Adult Coordinated Entry Agency ⓘ
Denied: Reassigned to Community Queue: Permanent Supportive Housing Queue	05/11/2023 2023-05-11 09:25:33	20	Swati Pande [TRAINING] San Francisco Adult Coordinated Entry Agency ⓘ

## Making a Referral from the Community Queue: Pending Screen

- You can also view the referral on the Pending Screen and see where they are referred to, who referred them and the status.
- The client's referral history is at the bottom of the screen, including the referral to your Housing Navigation Program.







# Assign Individual Navigator

(using Case Manager field on pending referral)

**REFERRALS**

Pending Community Queue Analysis Completed Denied Sent Availability Open Units

⚠ This Referral was created from Expired referral. FOLLOW REFERRAL

**REFERRAL: EDIT**

Client	Joshua Tree
Referred Program	Housing Navigation: ECS
Referred to Agency	[TRAINING] San Francisco Adult Coordinated Entry Agency
Referring Agency	[TRAINING] San Francisco Adult Coordinated Entry Agency
Referred Date	09/17/2020 1:03 PM
Days Pending	977 day(s)
In Process	855 day(s)
Qualified	Reassigned
Adult Priority score	63
Referred by Staff	Paul Devencenzi ⓘ
Case Manager	Select ▼
Last Activity	02/08/2022 CHECK-IN
Status	Pending ▼
Private	<input type="checkbox"/>

SAVE CHANGES CANCEL

Referred by Staff Paul Devencenzi ⓘ

Case Manager

Last Activity

Status

Private

✓ Select

Ace Train1

Ace Train2

Ace Train3

Ace Train4

Ace Train5

Ace Train6

Mike Reed

SAVE CHANGES CANCEL

Referred by Staff Paul Devencenzi ⓘ

Case Manager Ace Train1 ▼

Last Activity 02/08/2022 CHECK-IN

Status Pending ▼

Private ☐

SAVE CHANGES CANCEL

## Updating a Referral: Assigning a Case Manager

- On the referral screen, find the “Case Manager” field and click on it to see a dropdown of all SF ACE Staff who can be assigned as a case manager.
- Select the person assigned to outreach the client and then click on the save changes button to assign them to the referral. This should be updated if the assigned navigator changes




# Updating a Referral: Referral Notes

- The Housing Placement Team may put important information in the Referral Notes section
- This information will be relevant to their eligibility and placement options and should be reviewed before outreaching to the client.

NOTES


PD


↳ Reply from Paul Devencenzi @ [TRAINING] System Jun 5, 2023 at 10:27 AM 

- Placement Requirements: Approved RA for Elevator
- Recommended Placement(s): Tenderloin Housing Clinic
- Avoid: Previously declined the Pacific Bay Inn
- Preliminary eligibility...
  - CoC: Yes
  - PBV:Yes

B

I





SEND NOTE

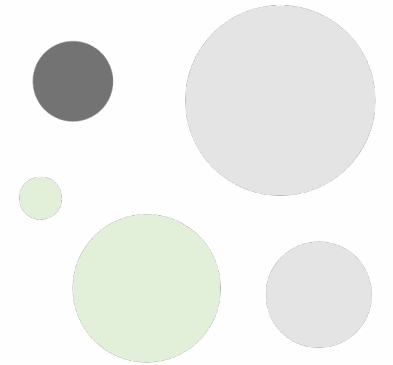




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# Adult Unit Refusal Protocol

# Adult Unit Refusal Protocol



## • Protocol

- The HSH Housing Placement Team is responsible for communicating the specifics of the protocol and any changes over time

## • Unit refusals and exemptions will be tracked using specific referral denial reasons

- Denying referrals is built into this new workflow in ONE, so tracking this way doesn't require an extra step
- It is therefore very important to choose the appropriate referral denial reason and HSH has developed a “desk guide” to provide detailed guidance
- ONE System “services” previously used to track unit refusal and extenuating circumstance exemptions should no longer be used

# Referral Denial Reasons

Denied By Type	Denied Reason	Denial Information
1. Client 2. Provider	1. Lack of Eligibility 2. Full Capacity/No Availability 3. Needs could not be met by program 4. Client refused service 5. Client did not show up or call 6. Self Resolved – Client Housed 7. Alternate referral 8. Alternate placement 9. Client out of Jurisdiction 10. Client previously received service 11. Disagreement with rules 12. Referral time expired 13. Falsification of Documents 14. Denied by Landlord/Property Manager 15. Other 16. HSG NAV ONLY: Navigation successful - reassign to queue before matching to building/unit	Text box

Triggers unit refusal protocol

Stop using these reasons

Use when client is matched to a unit or housing program

# Adult Referral Denial Reasons “Desk Guide”

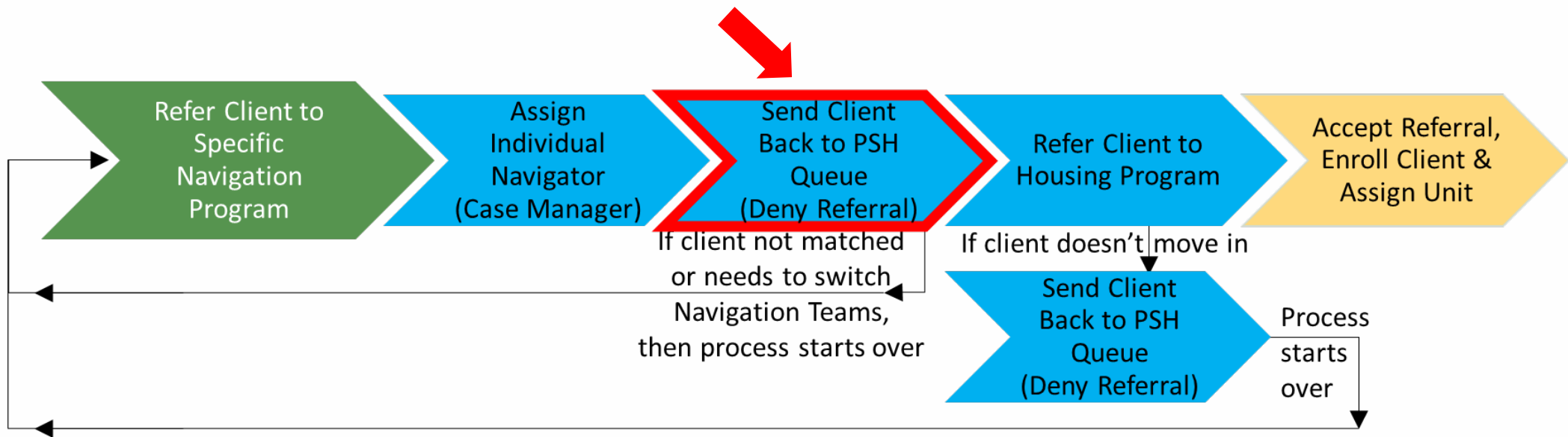
- Posted to the ONE System Help Site (on page for [Coordinated Entry Training Materials](#))
- Reason “Client refused service” is what triggers the unit refusal protocol

## Adult Referral Denial Reasons Desk Guide

The table below provides guidance on choosing referral denial reasons as part of the ONE System Adult Navigation & Placement Workflow.

Navigators must also populate the “Denied by Type” field and enter an additional note in the in the “Denial Information” text box. The last column below provides guidance on when to choose either “Provider” or “Client” in the “Denied by Type” dropdown field.

#	Denied Reason	When to choose this reason	Denied by Type
1	<b>Lack of eligibility</b>	<ul style="list-style-type: none"> <li>Client doesn’t meet funding requirements, (e.g., assigned to CoC but does not meet chronic homelessness test).</li> <li>Client does not pass background check.</li> <li>Navigator is unable to obtain required documentation.</li> </ul>	Provider
2	<b>Full Capacity/No Availability</b>	<ul style="list-style-type: none"> <li>Program does not have units available.</li> </ul>	Provider
3	<b>Needs could not be met by program</b>	<ul style="list-style-type: none"> <li>Client has a reasonable accommodation that could not be met by program (e.g., client is in wheelchair, but available units are all in buildings without working elevators).</li> <li>Client is nursing needs and needs to be reassigned to a nursing needs building.</li> <li>Client wishes to be housed as part of a couple and the assigned program does not have suitable units available.</li> <li>Client has obvious mobility constraints that could not be accommodated by provider.</li> <li>Client has minor children who will visit.</li> </ul>	Provider
4	<b>Client refused service</b>	<ul style="list-style-type: none"> <li>Client declined program/unit due to a housing preference, including room size, location/neighborhood, or amenities (bathroom/kitchen), unless supported by a reasonable accommodation request. <u>Please note the client’s specific reason for turning down the unit in the “Denial Information” text box.</u></li> </ul> <p><b>NOTE: Declining the unit triggers HSH’s unit refusal protocol.</b></p>	Client



"Reserve" Units at Full Availability Housing Programs for Provider Level Referrals

Send Client Back to the PSH Queue  
(parallel, ongoing process)  
When the Matchmaking Phase is Complete  
(by denying the referral)



**REFERRAL: EDIT**

Client: Joshua Tree

Referred Program: Housing Navigation: ECS

Referred to Agency: [TRAINING] San Francisco Adult Coordinated Entry Agency

Referring Agency: [TRAINING] San Francisco Adult Coordinated Entry Agency

Referred Date: 09/17/2020 1:03 PM

Days Pending: 977 day(s)

In Process: 855 day(s)

Qualified: Reassigned

Adult Priority score: 63

Referred by Staff: Paul Devencenzi ⓘ

Case Manager: Ace Train1

Last Activity: 02/08/2022 **CHECK-IN**

**Status:** Pending

Private: ☐

**SAVE CHANGES** **CANCEL**

**Denial Reason:** Denied

**Send to Community Queue:** Yes

**Denied By Type:** Client

**Denied Reason:** Select

**Denial Information:** Private

**Denial Reason:** Select

- ✓ Select
- Lack of Eligibility
- Full Capacity/No Availability
- Needs could not be met by program
- Client refused services
- Client did not show up or call
- Self Resolved - Client Housed
- Alternate Referral
- Alternate Placement
- Client out of Jurisdiction
- Client previously received service
- Disagreement with rules
- Referral time expired
- Falsification of Documents
- Denied by Landlord/Property Manager
- Other
- HSH NAV ONLY: Navigation successful - reassign to queue before matching to building/unit

**Denial Information:** Client could not be located.

**SAVE CHANGES** **CANCEL**

## Denying a Referral: Client Not Matched to Unit

- Find the status field and then select "Denied" from the dropdown list.
- Next select if the client is being returned to the queue and select the denial type (whether the client denied it, or a provider did).
- Then select the appropriate denial reason for the client. Check the Denial Reason Desk Guide to ensure you have the correct reason.
- You must write a brief note in the denial information box to submit.
- Hit "Save Changes" to submit.



## REFERRAL: EDIT

Client	Joshua Tree
Referred Program	Housing Navigation: Dolores Street
Referred to Agency	[TRAINING] San Francisco Adult Coordinated Entry Agency
Referring Agency	[TRAINING] Department of Homelessness and Supportive Housing
Referred Date	06/06/2023 4:54 PM
Days Pending	0 day(s)
In Process	0 day(s)
Qualified	Reassigned
Adult Priority score	63
Referred by Staff	Paul Devencenzi ⓘ
Case Manager	Select ▼
Last Activity	06/06/2023 <span>CHECK-IN</span>
Status	Denied ▼
Send to Community Queue	Yes ▼
Denied By Type	Client ▼
Denied Reason	HSH NAV ONLY: Navigation successful - reassign to queue before matching ▼
Denial Information	Accepted the Ambassador Hotel.
Private	<input type="checkbox"/>

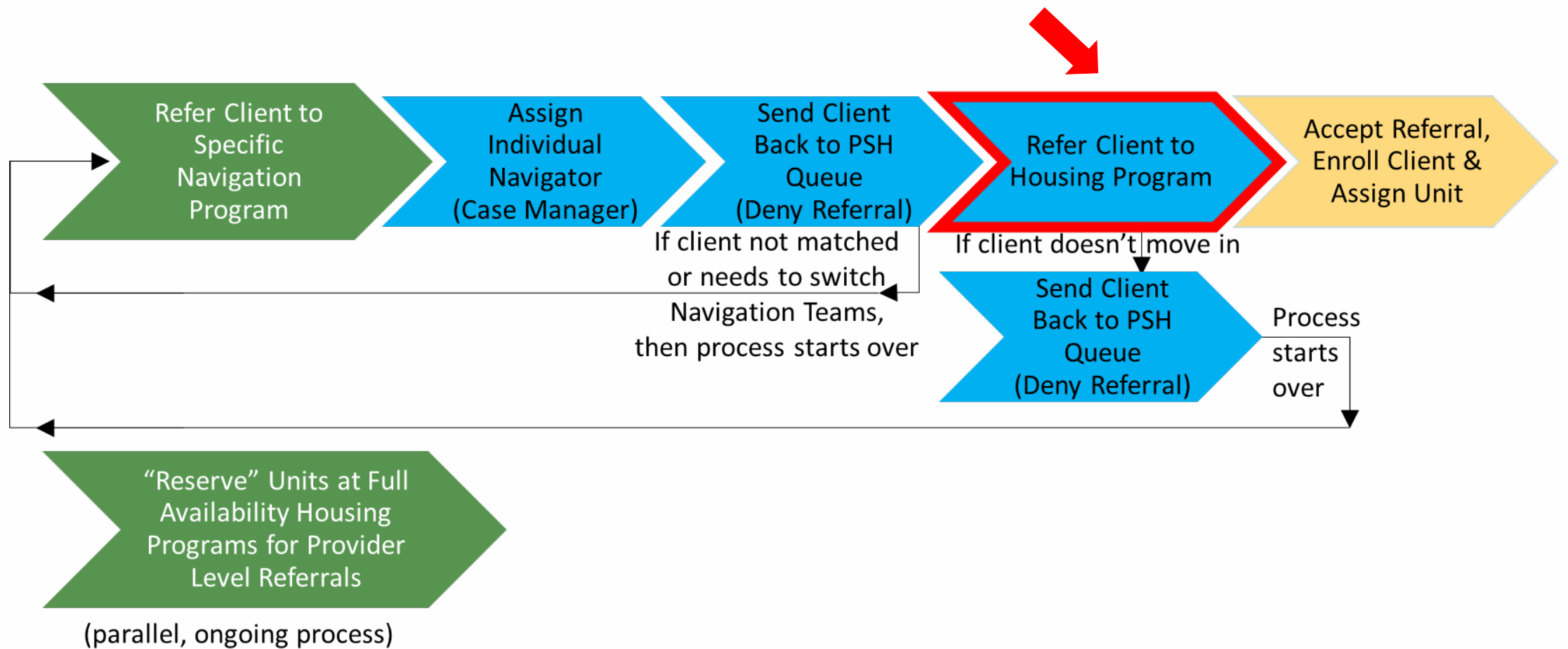
SAVE CHANGES

CANCEL

## Denying a Referral: Client Matched to a Unit

- Used when a client has accepted a unit and you are going to refer them to that specific program.
- To do so you must deny their referral to their navigation program.
- The denial must have the following parameters:
  - Sent to the Community Queue
  - Denied Type must be Provider
  - **Denied Reason must be "Navigation Successful – reassign to queue before matching to unit/building"**
  - The accepted program must be added to the Denial Information box





# Refer Client to the Housing Program

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

## Community Queue

☐ Eligible Clients Only

Search jos tre

Active Agency [TRAINING] Tenderloin Neighborhood Develo

Mode Standard

Characteristic -- Select --

Sort By Default

SEARCH



Pending

## Making a Referral from the Community Queue: Referral to a Housing Program

1. Ensure that you have selected the correct referring agency for yourself. Then click on the "Referrals" tab.
2. Now in the "Referrals" tab, click on Community Queue to see clients who are on a queue but do not have a referral.
3. Select the PSH queue, ensure you have the correct agency selected in "Active Agency" and type in the person's name or UI in the search bar.
4. Then hit "Search" and click on the pencil icon to begin the referral

SEARCH

Client	Referral Date	Days Pending
<div><div></div><div><div>Joshua Tree</div><div>Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency</div></div></div> <div></div> <div><div>This entry added by Swati Pande from primary agency [TRAINING] Department of Homelessness and Supportive Housing</div></div>	09/17/2020	977 <div></div>



Client Joshua Tree

Previous Referred Program Housing Navigation: ECS

Previous Referred to Agency [TRAINING] San Francisco Adult Coordinated Entry Agency

Referring Agency [TRAINING] San Francisco Adult Coordinated Entry Agency

Referred Date 09/17/2020 1:03 PM

Days Pending 991 day(s)

Qualified Reassigned

Adult Priority score 63

Last Activity 02/08/2022 **CHECK-IN**

Referred by Staff Paul Devencenzi ⓘ

Navigator **ASSIGN NAVIGATOR**

Private ☐

**SAVE CHANGES**

**CANCEL**

#### REASSIGN

Program Ambassador Hotel - CoC

**SAVE**

**MOVE TO ANOTHER QUEUE**

#### REASSIGN

Program 1036 Mission - CoC

Opening 05/01/2023 Unit#312 - Max income is 45000

**SAVE CHANGES**

**CANCEL**

## Making a Referral to a Housing Program

- Scroll down to the Reassign section to select the program you will make the referral to.
- Some programs will only require the program be selected and others will also require referral to be made to a specific opening.
- Once you have selected the program and opening (if needed) click "Save" to complete the referral.



# Making a Referral to a Housing Program: Assigning a Case Manager

- After you have completed the referral a "Case Manager" must be assigned.
- To select yourself, click on the dropdown menu and select your name from the dropdown list.
- Click "Save Changes" to complete the case manager assignment.

**REFERRAL: EDIT**

Client	Joshua Tree
Referred Program	Ambassador Hotel - CoC
Referred to Agency	[TRAINING] Tenderloin Neighborhood Development Cooperation
Referring Agency	[TRAINING] Department of Homelessness and Supportive Housing
Referred Date	06/06/2023 4:54 PM
Days Pending	0 day(s)
In Process	0 day(s)
Qualified	Reassigned
Adult Priority score	63
Referred by Staff	Paul Devencenzi ⓘ
Case Manager	Select ▼
Last Activity	06/06/2023

CHECK-IN

SAVE CHANGES

CANCEL

**Case Manager** Mike Reed ▼

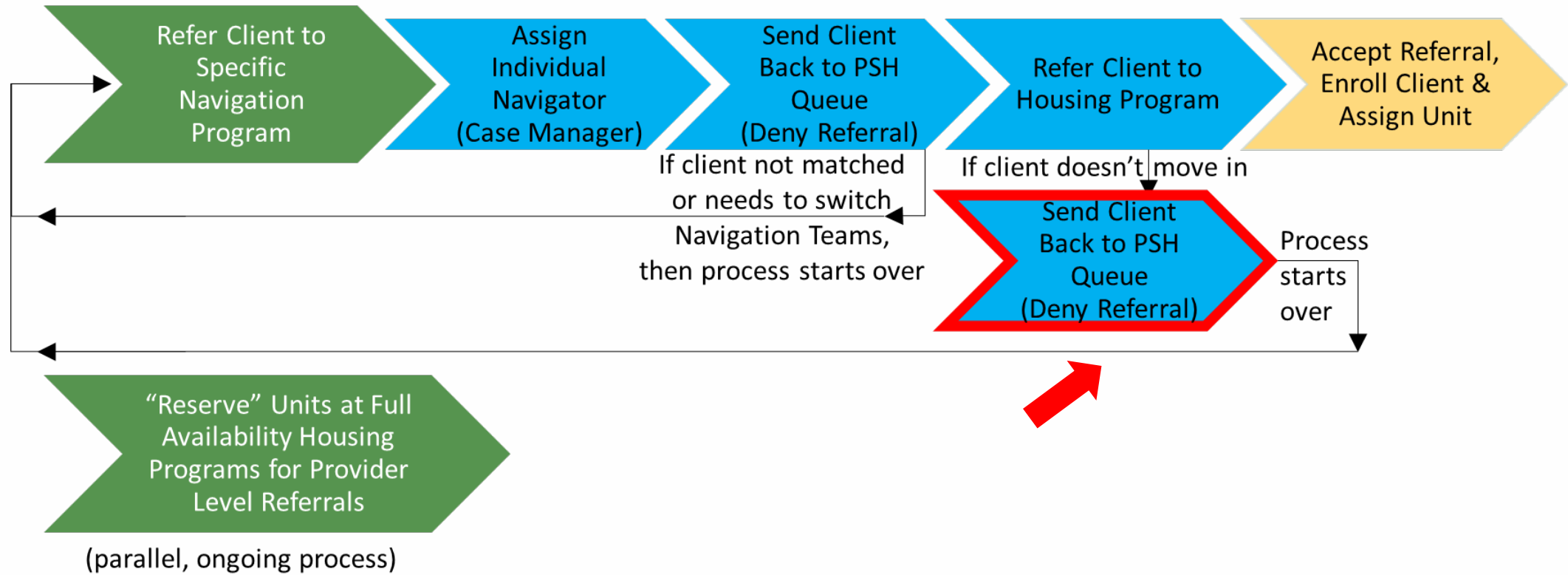
**Last Activity** 06/06/2023

CHECK-IN

SAVE CHANGES

CANCEL





Send Client Back to the PSH Queue if Client Doesn't Move Into Housing (by denying the referral)

Paul Devencenzi,  
[TRAINING] Mission Housing DeveL...

SEARCH CASELOAD REFERRALS

ADD CLIENT +

SEARCH

Your recent client searches:

- Joshua Tree
- Paul Houser
- Ginny West Coast
- Problem Solving-2
- Annie Houser

Recover deleted data

REFERRALS

Pending Community Queue Analysis Completed Denied Sent Availability Open Units

Pending Referrals

Search Mode Standard

Sort By Default Characteristic -- Select --

Eligible Clients Only

SEARCH

Client	Referral Date	Qualified	Days Pending
Joshua Tree Program: Altamont - HUD PBV Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency	09/17/2020	Reassigned	977 total 0 pending

Status Denied

Send to Community Queue Yes

Denied By Type Client

Denied Reason Client refused services

Denial Information Client declined after viewing unit. Did not like location

Private

SAVE CHANGES CANCEL

## Denying a Program Referral: Client Does Not Move In

- If a client accepts a housing referral, but subsequently does not move in for any reason, their referral must be denied.
- To deny a client from a program referral, you must first change your agency to whichever the program is listed under.
- Then navigate to their referral screen, change the status to denied according to the reason for the denial and complete the rest of the fields as applicable.
- Use the Denial Reasons Desk Guide to ensure you have the correct reason!





# Implementation Timeline

## • Housing Placement Team Activities

- Referrals to the new Housing Navigation Programs beginning with the June cohort/batch
- Units reserved for provider level (batch) referrals will be maintained in ONE from 6/12/23 onward (formerly tracked in the OVT external tool)

## • Navigation Team Activities

- Begin following new workflow right away as the Housing Placement Team refers clients to your team's Housing Navigation Program

## • New Unit Refusal Protocol Tracking

- Official start date will be 6/8/23

# What if I need support?



## • Refer to Training Materials

(posted to ONE [help site](#) under Training Materials for Coordinated Entry)

- Adult Referral Denial Reasons “Desk Guide”
- Training slides
- Video recording of this training

## • Contact Bitfocus

- Email Local Sys Admin Team (Holly & Paul) [onesf-admin@bitfocus.com](mailto:onesf-admin@bitfocus.com)
- Email the Help Desk [onesf@bitfocus.com](mailto:onesf@bitfocus.com)

## • Reach out to the HSH Housing Placement Team or Adult CE Program Manager

## • Email the HSH ONE System Team

- Email [HSHONESystemPMO@sfgov.org](mailto:HSHONESystemPMO@sfgov.org)

# Wrap Up

- Any final questions or feedback?
- Thank you for your attention today!

