



Adult Coordinated Entry

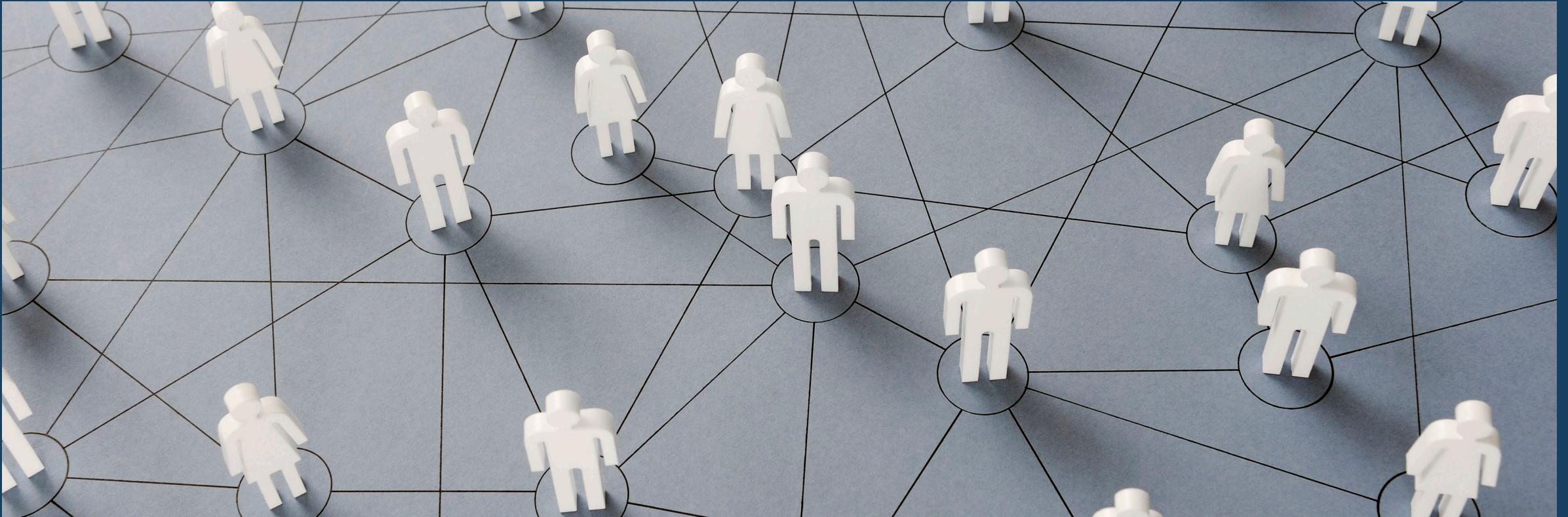
Problem Solving & Housing Assessment
ONE System Training

Learning Objectives

Gain an understanding of the Coordinated Entry (CE) process

Understand tasks as they relate to CE

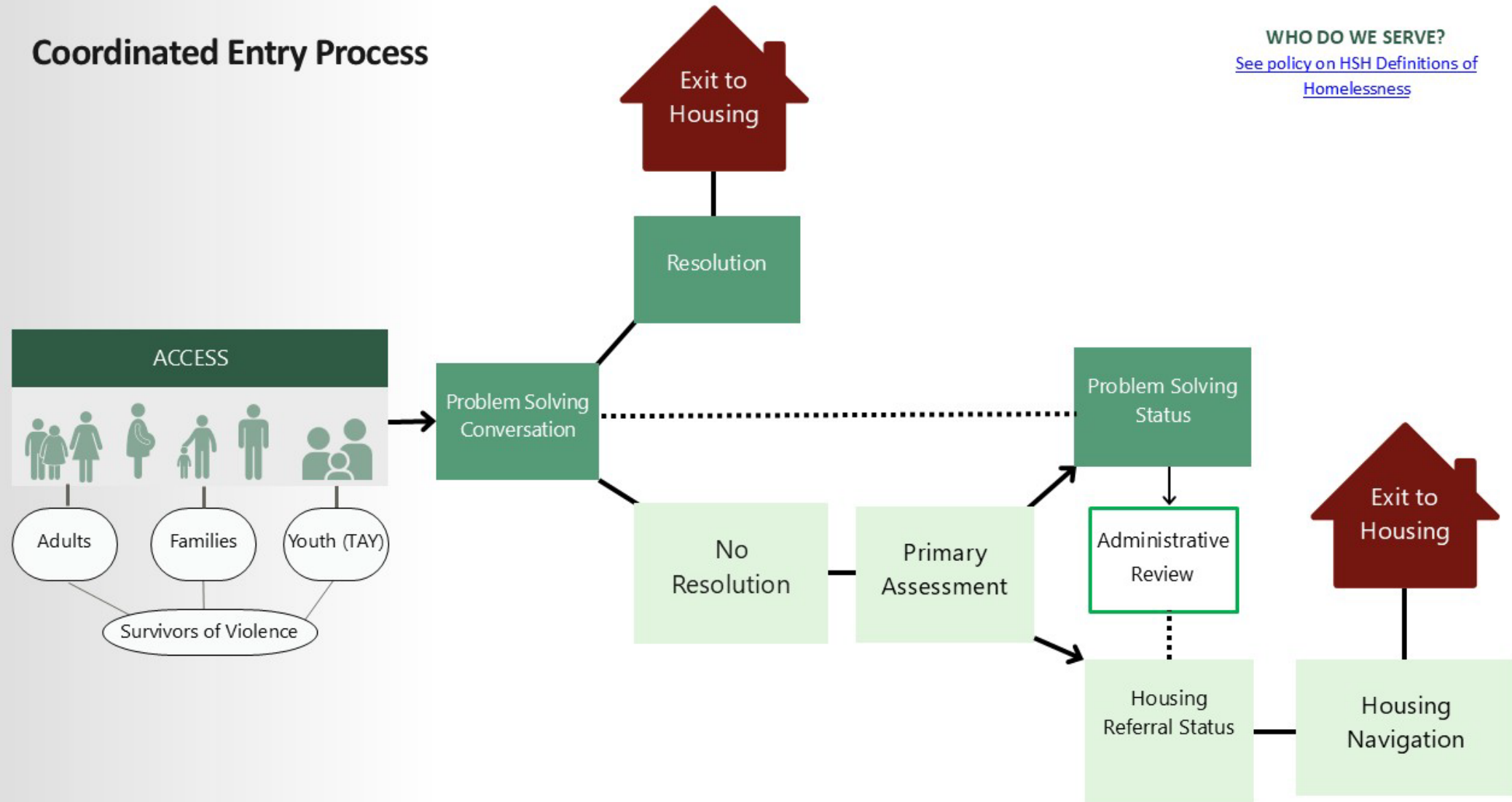
Observe Access Point workflow in the ONE System



Getting Started in Coordinated Entry

Coordinated Entry Process

WHO DO WE SERVE?
[See policy on HSH Definitions of Homelessness](#)



Getting Connected to Coordinated Entry

Households connect with CE through various ways:

Access Points

- Families with children under 18 directed to Family Access Points
- Transitional Age Youth (18-24) and (25-27) can choose between the Adult and Youth Access Points
- Adults over the age 18 without minor children directed to Adult Access Points

Outreach teams

- DPH Outreach Teams, including SFHOT
- Mobile Access Points
- Access Partners

Once a household is determined eligible for CE, a client record is created in ONE.



Getting ONE System Access

1. Complete the required trainings outlined below. Depending on your Access Role, additional trainings may be required.
 - [Clarity Human Services General Training](#)
 - [HSH Compliance, Privacy, and Data Security Training](#)
2. Notify your Agency Lead of completion.
3. Your Agency Lead will contact the Bitfocus Help Desk at onesf@bitfocus.com or (415) 429-4211 to request a new ONE System user account for you. The Agency Lead will need to provide the following information:
 - Username
 - User email
 - Access role



For more information, please visit - <https://onesf.bitfocus.com/new-user-info>



Navigating the ONE System

Navigating ONE

Adult Coordinated Entry work should be completed under the San Francisco Adult Coordinated Entry Agency



If you have access to multiple agencies, you will need to switch to the **San Francisco Adult Coordinated Entry** agency to enroll clients and perform assessments

Looking up households in ONE

- Once determined eligible for CE, a household is entered into ONE if they aren't already in the system
- Search for household/head of household
 - Search by name, DOB and SSN
- If unable to find head of household, create a new profile

Clients
Search for a client

Search by name, partial name, DOB, or SSN

Showing recently accessed clients. Use the search bar above to find other clients.

Duplicate Profiles

- If you discover multiple profiles in ONE for a household:
 - Please contact the Bitfocus Help Desk (onesf@bitfocus.com) to request the records be merged together
 - Provide the unique identifiers for each profile and identify the primary profile
- In the example below, you will notice that one profile has the name misspelled but it is the same household

Client	DOB	SSN	ROI	Household Members
▼ Test, Rita EF5C22762	8/8/98 Age: 27	# 8888	Missing	Rita Test Not Set 1 - 1 of 1 < >
▼ Test, Rita AF92F309D	8/8/98 Age: 27	# 8888	Missing	Rita Test Not Set 1 - 1 of 1 < >

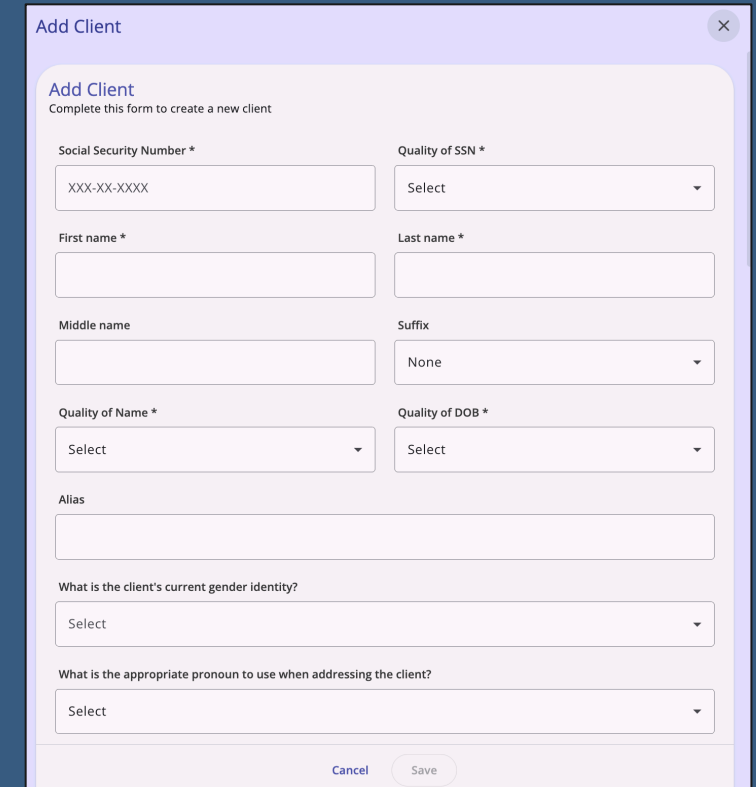
1 - 2 of 2 < >

Creating New Profiles



The screenshot shows the 'Clients' section of a software interface. It features a search bar with the placeholder text 'Search for a client'. To the right of the search bar, there is a red rectangular box highlighting a button with a plus sign and a vertical ellipsis (three dots).

- Create a new profile if you can definitively confirm that your household is unique
- Collect as much information as possible, and avoid using “Data Not Collected” whenever possible
 - If necessary, use “client doesn’t know” or “client prefers not to answer”
- For existing profiles, review and confirm that all information is correct



The screenshot shows the 'Add Client' form, which is a modal window titled 'Add Client' with a close button (X) in the top right corner. The form contains the following fields:

- Social Security Number ***: A text input field with the placeholder 'XXX-XX-XXXX'.
- Quality of SSN ***: A dropdown menu with 'Select' as the current option.
- First name ***: A text input field.
- Last name ***: A text input field.
- Middle name**: A text input field.
- Suffix**: A dropdown menu with 'None' as the current option.
- Quality of Name ***: A dropdown menu with 'Select' as the current option.
- Quality of DOB ***: A dropdown menu with 'Select' as the current option.
- Alias**: A text input field.
- What is the client's current gender identity?**: A dropdown menu with 'Select' as the current option.
- What is the appropriate pronoun to use when addressing the client?**: A dropdown menu with 'Select' as the current option.

At the bottom of the form, there are two buttons: 'Cancel' and 'Save'.

**Please fill in
Release of
Information form**

Release of Information

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

Enter the release of information details

Permission *

Yes

Start Date *

08/06/2026

MM/DD/YYYY

End Date *

08/06/2029

MM/DD/YYYY

Documentation *

Electronic Signature

Select

Electronic Signature ✓

Attached PDF



By signing this form, I authorize the following:

- I authorize HSH, the Partner Agencies, and their authorized agents and representatives to collect, use, and disclose my personal information in compliance with the Notice, with my written consent, or when required by law. I understand that the Partner Agencies may change over time, and that a current list of Partner Agencies is available on the HSH website at: www.sf.gov/hsh-partner-agencies-one-system-access. I understand that the HSH reserves the right to amend the Notice and make the amended Notice effective for personal information collected, used, or processed as well as any information collected, used, or processed in the future.
- I authorize HSH to disclose my personal information to CCSF Homeless Adult and Family Multidisciplinary Personnel Teams (HMDT) for the purpose of expediting identification, assessment, and linkage to housing and services.
- If I am an enrolled member of a Medi-Cal Managed Care Plan, including San Francisco Health Plan (SFHP), Anthem Blue Cross, or Kaiser Permanente, I authorize HSH to use and disclose my personal information to my health plan for the purpose of providing or coordinating my health care and to administer coordination, authorization, and billing for CalAIM Community Supports.

Signature:

✕

CLIENT FULL NAME

No value

08/06/2026

Update Contact and Location Information

Contact

PT Pablo Test
You are currently viewing the Client Record pages for Pablo Test.

Contacts
View all contacts for Pablo Test

No results yet!
Results will be displayed here when they are available.

PT Pablo Test
You are currently viewing the Client Record pages for Pablo Test.

Profile
Privacy
Household
History
Programs
Services
Assessments
Units/Beds
Care Team
Notes
Alerts
Files
Forms
Contacts

Add Contact
Add a new contact for Pablo Test

Contact Type *

Client

Aunt/Uncle

Case Manager

Child

Client- Work

Client- Cell

XXX-XXX-XXXX

Active Contact

Contact Date *

08/11/2026

MM/DD/YYYY

Note

Enter a note...

Cancel Save

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

Location

PT Pablo Test
You are currently viewing the Client Record pages for Pablo Test.

Client Location
View a list of the locations for the client

Address Date Type Created by

1030 Montgomery St
San Francisco, CA, USA, 94133-4505

Paul Devesperoni

PT Pablo Test
You are currently viewing the Client Record pages for Pablo Test.

Profile
Privacy
Household
History
Programs
Services
Assessments
Units/Beds
Care Team
Notes
Alerts
Files
Forms
Contacts
Location

Add Client Location

Address Type *

Home

Name *

Address *

Address (line 2)

Location Date *

Active Location

Add Location Photos

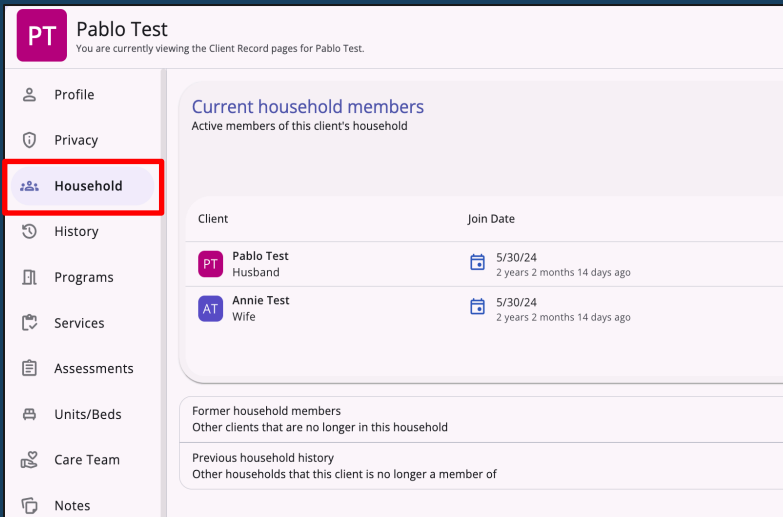
Upload

Location Photos

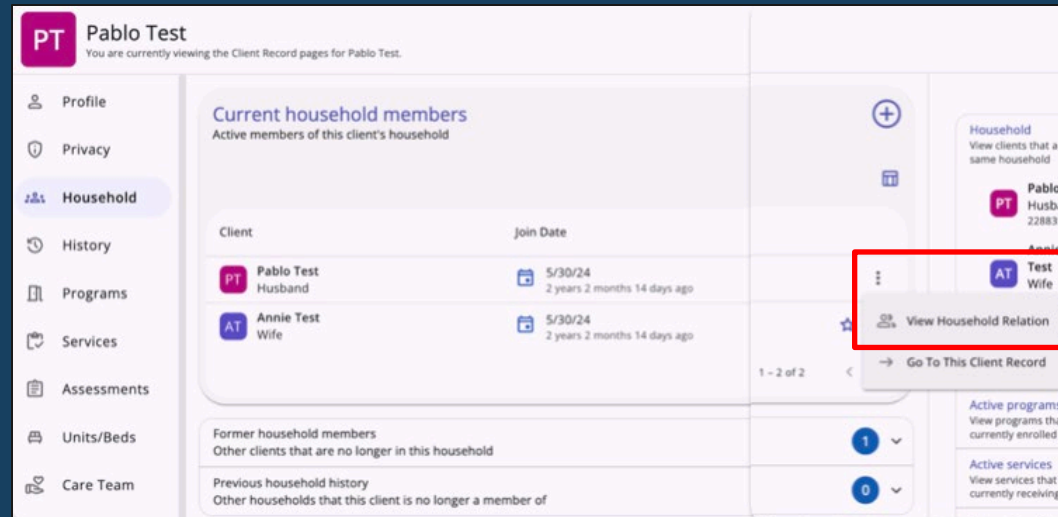
For mobile team, the arrow can be used to mark the exact location you met with the client.

Managing Households

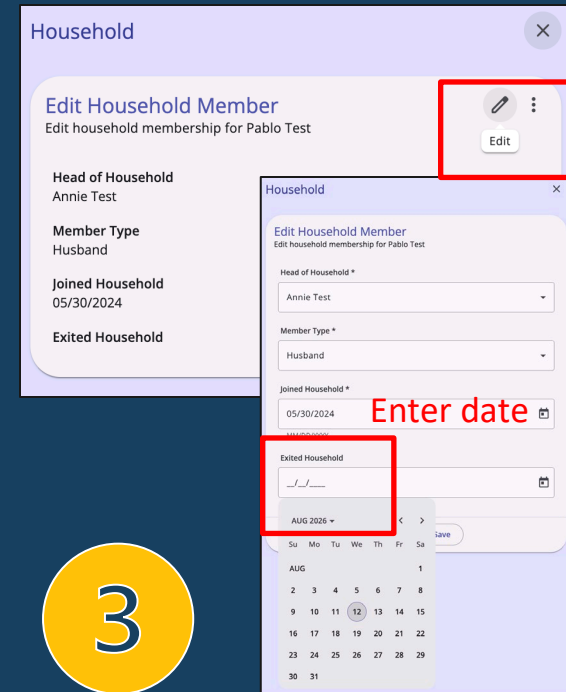
If the household is part of a family but is moving forward individually, you will need to remove the household as a family member in ONE



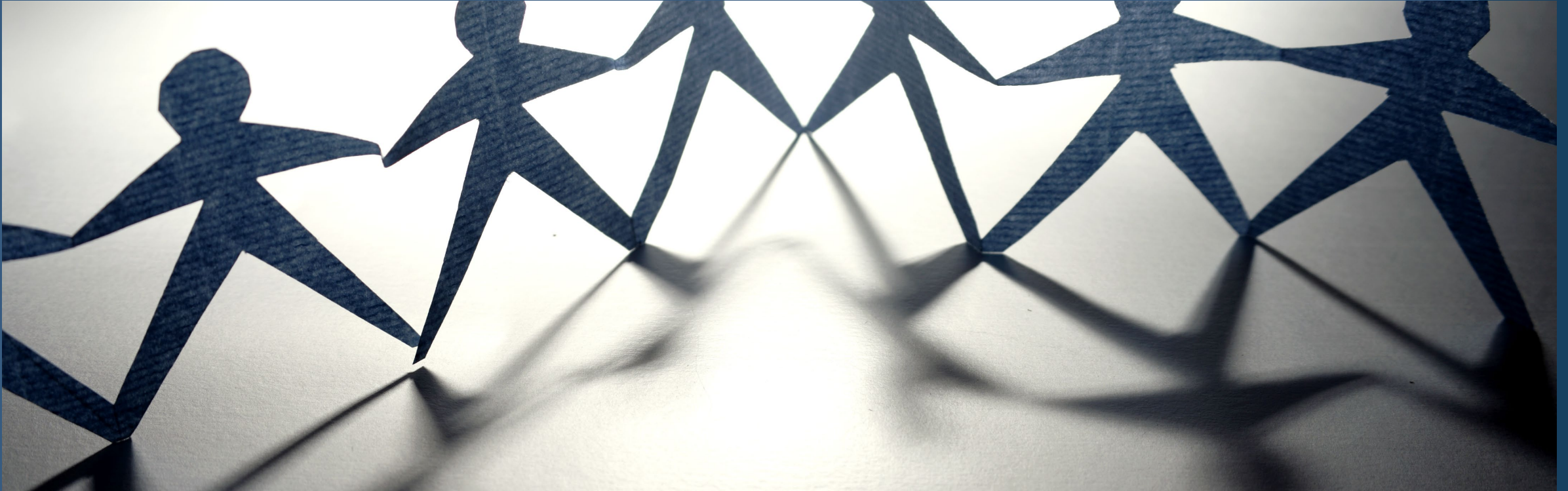
1



2



3



Enrollments

Coordinated Entry Enrollment

All households who are eligible for CE should be enrolled into a CE program

Enrollments are completed to show that households are actively being engaged by the CE and the Homelessness Response System

Information cascades forward to other fields and screens in ONE

Enrollment is a HUD requirement

Coordinated Entry Enrollment in ONE

Program enrollments

Program enrollment history for Pablo Test

Program Name	Entry Date	Exit Date	Created by	
CG City Gardens - HUD PBV PH - Housing with Services (no disability required for entry) TRAIN - Abode Services	6/18/26 1 months 25 days ago	8/14/26 1 days from now	PD Paul Devencenzi TRAIN - Abode Services Added by Paul Devencenzi from primary agency System	
EM ECS: Mobile Access Point Coordinated Entry TRAIN - San Francisco Adult Coordinated Entry Agency	6/3/26 2 months 10 days ago	6/3/26 2 months 10 days ago	PD Paul Devencenzi TRAIN - San Francisco Adult Coordinated Entry Agency Added by Paul Devencenzi from primary agency System	

1 - 2 of 2

Add program enrollment

1 Select program

Available Programs

Select the program for the enrollment.

Program Name

Access Partner - SF Health Plan

Access Partner - SFHOT

Access Partner - Shelter Health

Access Partner - UCSF Citywide ICM Programs/PES

Access Partner - VA

Access Partner - ZSFGH

ECS: 2 Month Tenant Living Services

ECS: Mobile Access Point

ECS: SOMA Access Point

Housing Navigation: ECS Navigation

1 - 10 of 20

Next

Select the drop down next to the program corresponding to the access point where you work.

Add program enrollment

Select program

Record Current Living Situation

Pablo Test entry screen

Include household members (optional)

5 Completed

Nice! You finished this task!

Tap the Complete button below to continue.

Task Summary:

Program Enrollment

Current Living Situation recorded

Complete

Coordinated Entry Enrollment in ONE

- 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" by asking the client all questions. Select "Client doesn't know" or "Client prefers not to answer" if appropriate.

The screenshot shows a web form titled "Add program enrollment" with a close button (X) in the top right corner. On the left side of the form, there is a vertical progress indicator with three steps: "Select program", "Record Current Living Situation", and "3 Pablo Test entry screen". The main content area is titled "New Client Program" with the subtitle "Create client program for Pablo Test". It contains several input fields: "Program Date *" with a date picker showing "08/12/2026" and a calendar icon; "Translation Assistance Needed" with a dropdown menu currently showing "No"; "Last Permanent Zipcode" with an empty text input field; and "Quality of Zip Code" with a dropdown menu currently showing "Full or Partial Zip Code Reported".



Current Living Situation Assessment

Current Living Situation Assessment

REQUIRED

- Used to regularly document the following:
 - The current living situation of people experiencing homelessness
 - Chronicity of homelessness
 - Risk of imminent homelessness
- Used to understand how many times a person is engaged with the HRS while experiencing homelessness
- For Coordinated Entry, record a CLS any time any of the following occurs:
 - Project Start (enrollment into CE program)
 - A CE Assessment or CE Event is recorded
 - The household's living situation changes



Current Living Situation Assessment

You will be prompted to add a Current Living Situation while enrolling client into the CE program as part of the enrollment screen.

Add program enrollment

Select program

Record Current Living Situation

Record Current Living Situation

Current Living Situation is required for this program at each client contact. Complete the initial assessment below.

Date of Contact *

08/12/2026

MM/DD/YYYY

Current Living Situation *

Select

Location Details

Save

3 Pablo Test entry screen

4 Include household members (optional)

5 Completed

 Bitfocus

21

Current Living Situation Assessment

“Living Situation Verified By” field should be the program that verified the person’s living situation. Select the program from the list.

Examples:

- Nav Center staff informed the AP that the household is staying the Nav Center. Verified by would be the appropriate Nav Center.
- The household self reported the are sleeping in their car. Verified by would be the AP program where the household was seen.

Program Assessment: Current Living Situation
Current Living Situation data collection for [REDACTED]

Date of Contact *

09/04/2026 

MM/DD/YYYY

Current Living Situation * 

Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway ... ▼

Living Situation Verified By

Select option ▼

Location Details



Cancel Save

Current Living Situation Assessment

Add program enrollment

Select program

Record Current Living Situation

Record Current Living Situation

Current Living Situation is required for this program at each client contact. Complete the initial assessment below.

Date of Contact *

08/12/2026

MM/DD/YYYY

Current Living Situation *

Hospital or other residential non-psychiatric medical facility

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

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



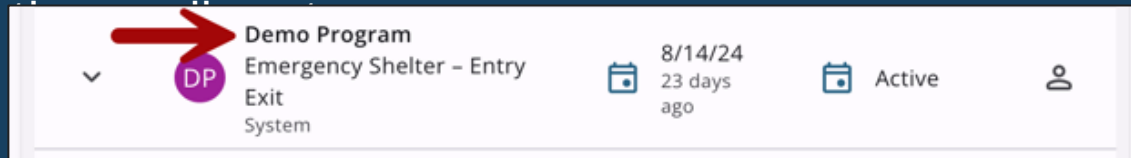
Services and Events

Problem Solving Services and Events

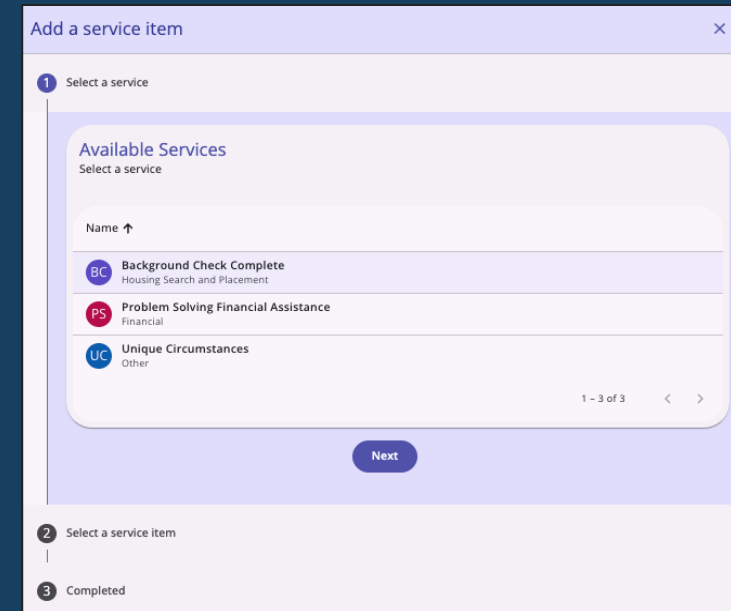
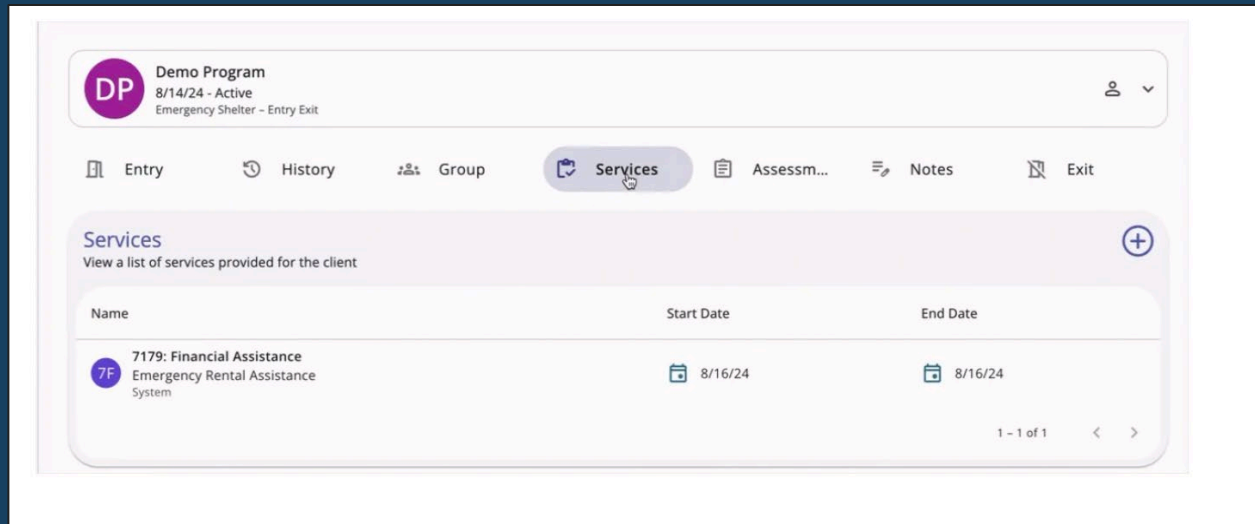
Problem Solving Services and Events	Where to find them?
Problem Solving Financial	Services Tab
Problem Solving Conversation	Events Tab
Housing Location Assistance	Events Tab
Problem Solving Travel and Relocation Support	Events Tab

How to enter services

Locate the enrollment in the client's **Programs** tab on the left sidebar. Click on the program to open

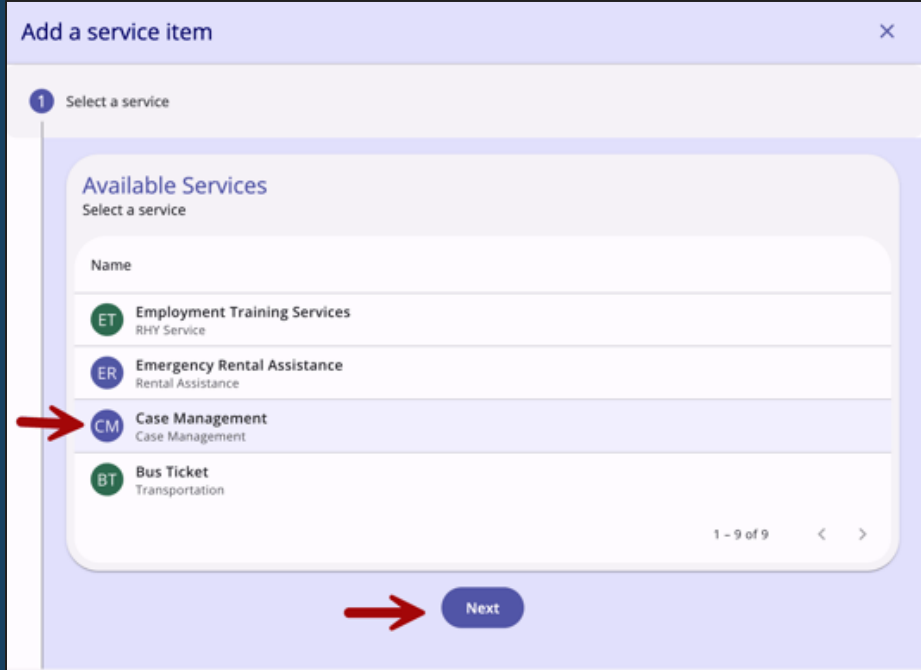


Within the enrollment, click the **Services** tab and then click the **Add(+)** icon. A list of services will appear.



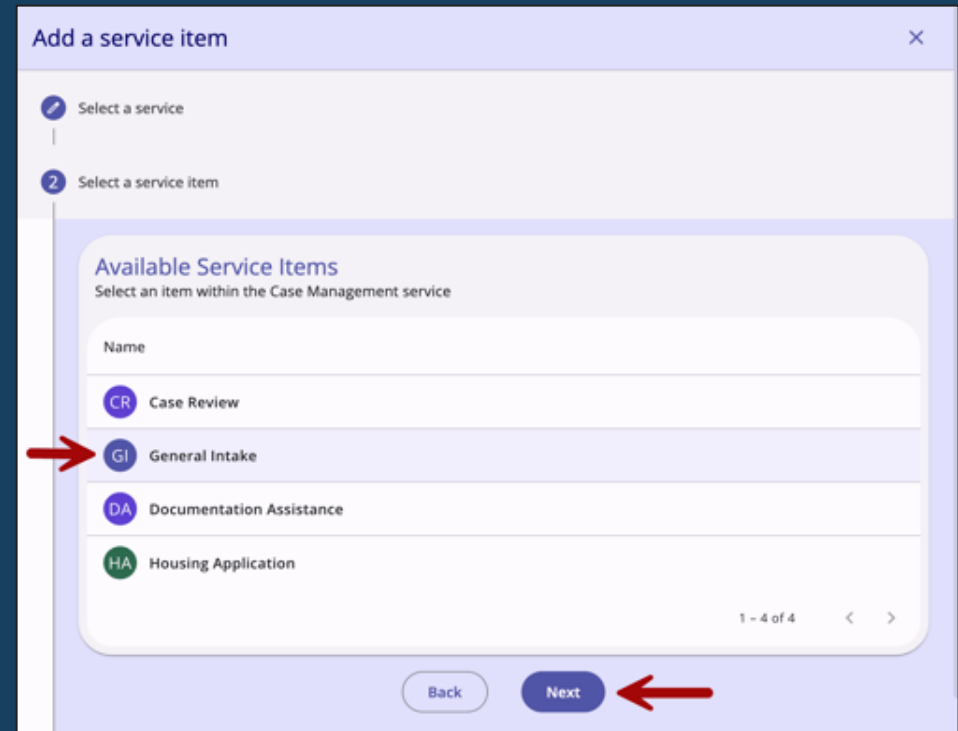
How to enter services

From the list of services, click the name of the service you want to record and then click **Next**.



The screenshot shows the 'Add a service item' form with a close button (X) in the top right corner. The first step, '1 Select a service', is active. Below the step indicator is a section titled 'Available Services' with the instruction 'Select a service'. A search bar labeled 'Name' is at the top. Below it is a list of services: 'ET Employment Training Services RHY Service', 'ER Emergency Rental Assistance Rental Assistance', 'CM Case Management Case Management', and 'BT Bus Ticket Transportation'. A red arrow points to the 'CM Case Management' item. At the bottom right of the list is a pagination indicator '1 - 9 of 9' with left and right arrows. At the bottom of the form is a blue 'Next' button with a red arrow pointing to it.

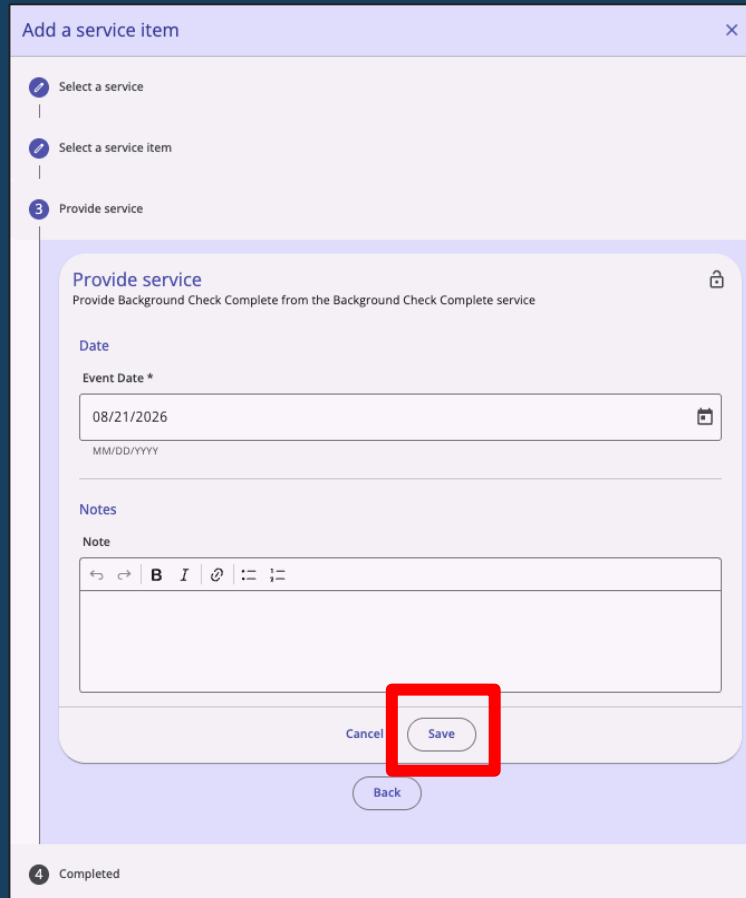
Click the name of the service item you want to record.



The screenshot shows the 'Add a service item' form with a close button (X) in the top right corner. The second step, '2 Select a service item', is active. Below the step indicator is a section titled 'Available Service Items' with the instruction 'Select an item within the Case Management service'. A search bar labeled 'Name' is at the top. Below it is a list of service items: 'CR Case Review', 'GI General Intake', 'DA Documentation Assistance', and 'HA Housing Application'. A red arrow points to the 'GI General Intake' item. At the bottom right of the list is a pagination indicator '1 - 4 of 4' with left and right arrows. At the bottom of the form are two buttons: a grey 'Back' button and a blue 'Next' button with a red arrow pointing to it.

How to enter services

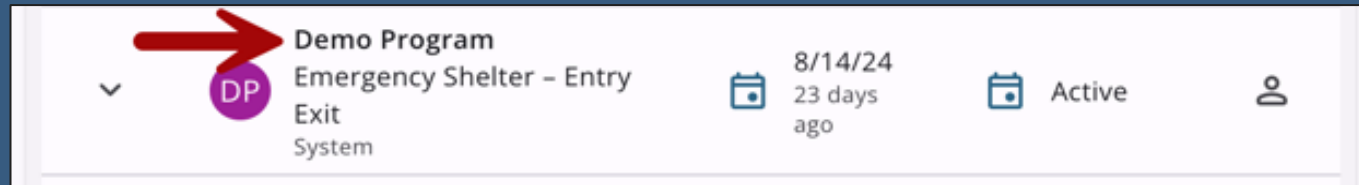
Select the appropriate date, add a note, and finally click **Save**.



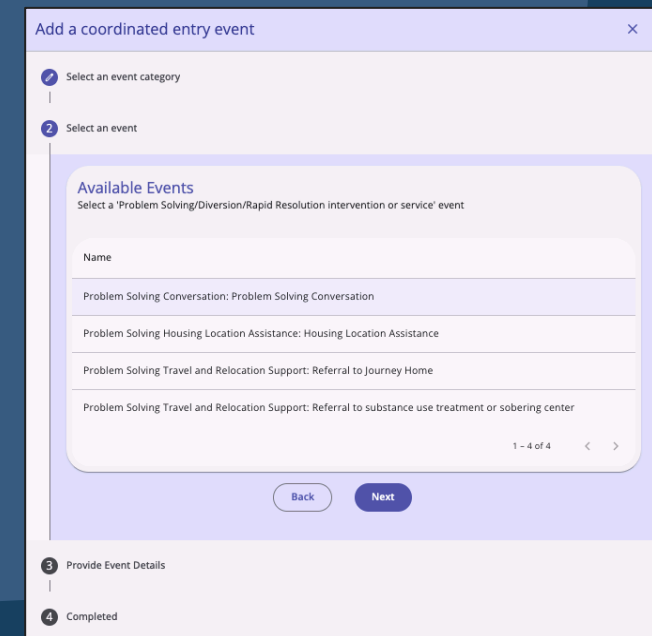
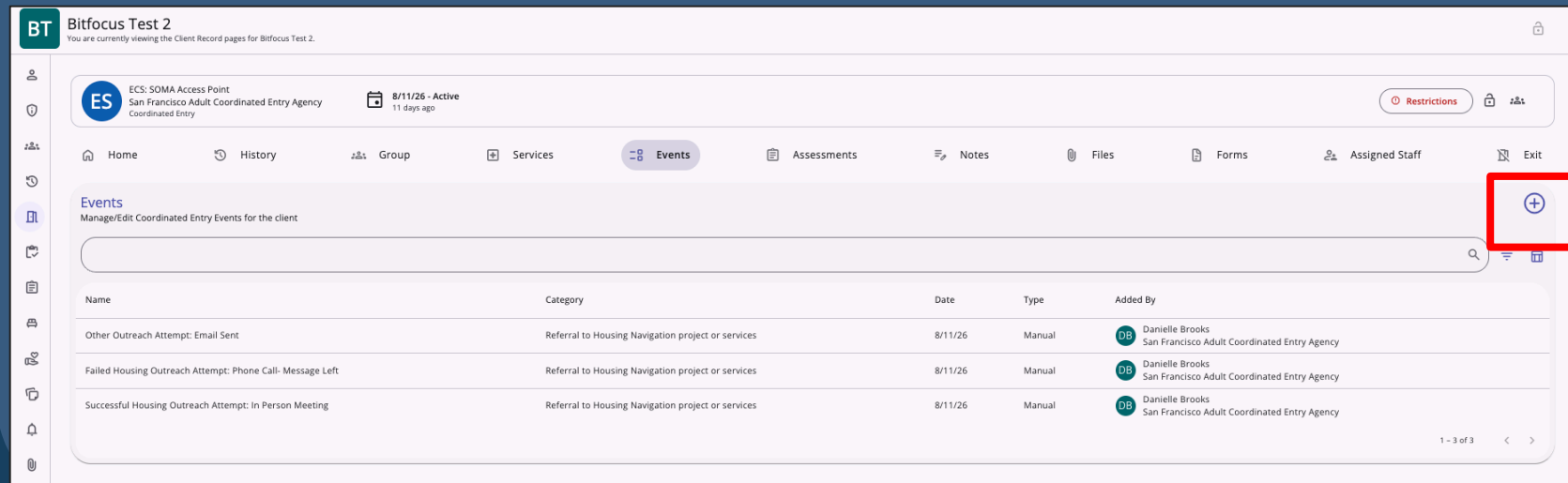
The screenshot shows a mobile application interface for adding a service item. The title bar at the top is purple and says "Add a service item" with a close button. Below the title bar is a progress indicator with three steps: "Select a service", "Select a service item", and "Provide service" (which is the current step, indicated by a blue circle with the number 3). The main content area is white and contains a section titled "Provide service" with a lock icon. Below this title is a subtitle: "Provide Background Check Complete from the Background Check Complete service". There are two main input fields: "Date" and "Notes". The "Date" field is labeled "Event Date *" and contains the date "08/21/2026" with a calendar icon on the right. Below the date field is a small text label "MM/DD/YYYY". The "Notes" field is labeled "Note" and contains a rich text editor with a toolbar (undo, redo, bold, italic, link, bulleted list, numbered list) and a large text area. At the bottom of the form are three buttons: "Cancel", "Save", and "Back". The "Save" button is highlighted with a red square. At the very bottom of the screen, there is a status bar with a blue circle containing the number 4 and the word "Completed".

How to enter events

Locate the enrollment in the client's **Programs** tab on the left sidebar. Click on the program to open the enrollment.



Within the enrollment, click the **Events** tab and then click the **Add (+)** icon. A list of events will appear.



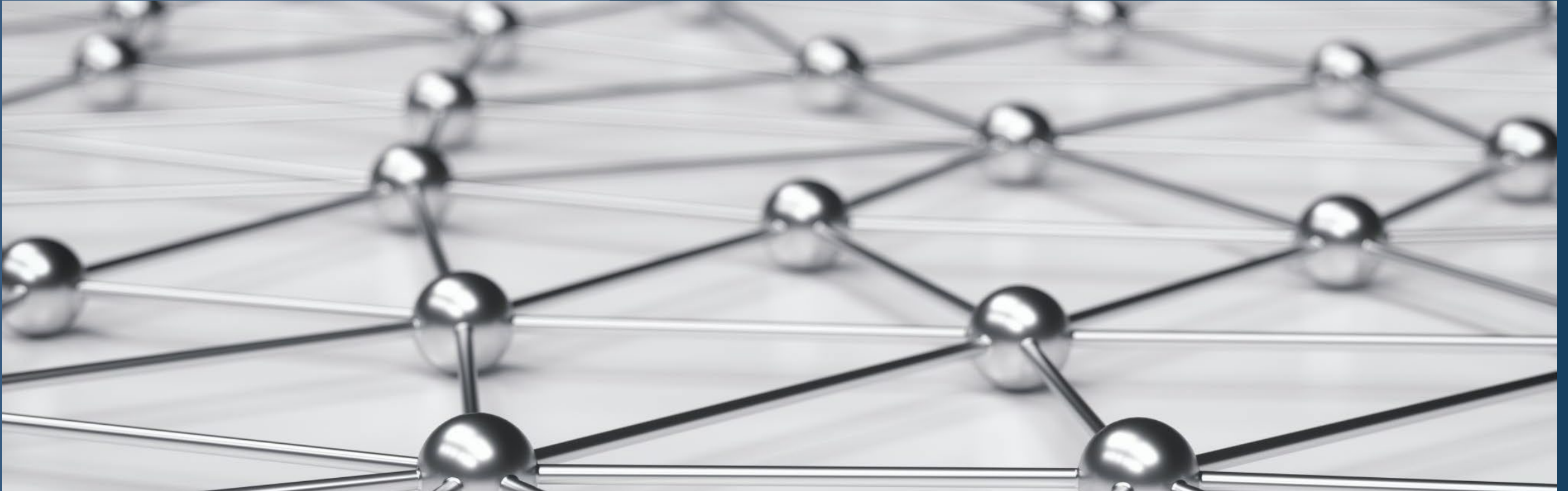
How to enter events

From the list of events, click the name of the event you want to record and then click **Next**.

The screenshot shows the first step of a four-step process to add a coordinated entry event. The title bar reads 'Add a coordinated entry event'. A progress indicator on the left shows four steps: 1. Select an event category (active), 2. Select an event, 3. Provide Event Details, and 4. Completed. The main content area is titled 'Available Categories' with the instruction 'Select an event category'. It contains a list of three categories: 'Name', 'Problem Solving/Diversion/Rapid Resolution intervention or service', 'Referral to Street Outreach project or services', and 'Referral to Housing Navigation project or services'. At the bottom right of the list is a pagination indicator '1 - 3 of 3' with left and right arrow icons. At the bottom of the form are two buttons: 'Cancel' and 'Next'.

Fields will appear for you to complete. Click **Save** when you are finished entering all information.

The screenshot shows the third step of the process, 'Provide Event Details'. The progress indicator on the left shows steps 1, 2, and 3 (active), with step 4 'Completed' at the bottom. The form fields include: 'Event Category' with the value 'Problem Solving/Diversion/Rapid Resolution intervention or service'; 'Event' with the value 'Problem Solving Conversation: Problem Solving Conversation'; 'Event Date' with a date picker set to '08/21/2026' and a calendar icon; 'Result: Client housed/re-housed in a safe alternative' with a dropdown menu showing 'Select'; and 'Event Notes' with a rich text editor containing the placeholder 'Enter your note here...'. At the bottom are three buttons: 'Cancel', 'Save', and 'Back'. The 'Completed' step indicator is visible at the bottom of the screen.



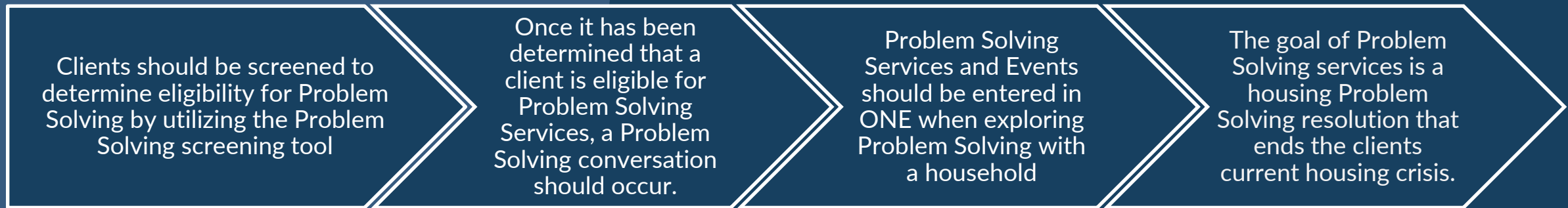
Problem Solving

Problem Solving

- Creative, strength-based conversations that explore and plan housing solutions **outside** of the Homelessness Response System
- Various categories of Problem Solving services
 - Problem Solving conversations
 - Housing location assistance
 - Travel and relocation support outside of San Francisco
 - Reunification, mediation, and conflict resolution
 - Financial assistance
- Problem Solving can be cyclical:
 - A household may explore Problem Solving multiple times before finding a sustainable solution
 - If unsuccessful, the household is given the housing prioritization assessment (CE primary assessment)



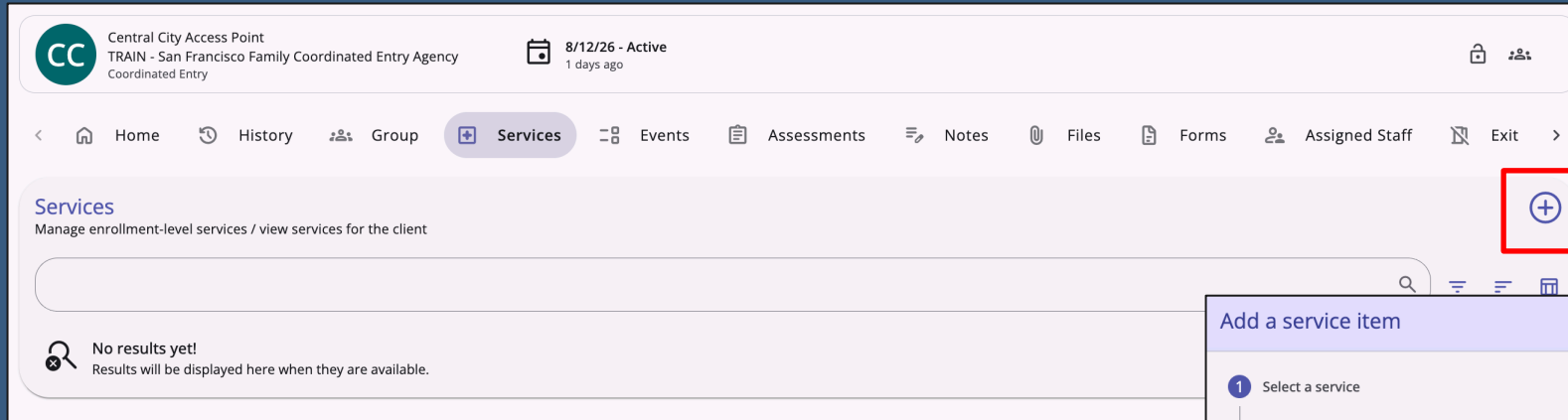
Problem Solving Services



The narrative of the note should include details of the conversation with the household; including any Problem Solving solutions being explored.

More information on Problem Solving Training is located on the SF ONE System Support site at:
<http://onesf.bitfocus.com/>

Problem Solving Services



Central City Access Point
TRAIN - San Francisco Family Coordinated Entry Agency
Coordinated Entry

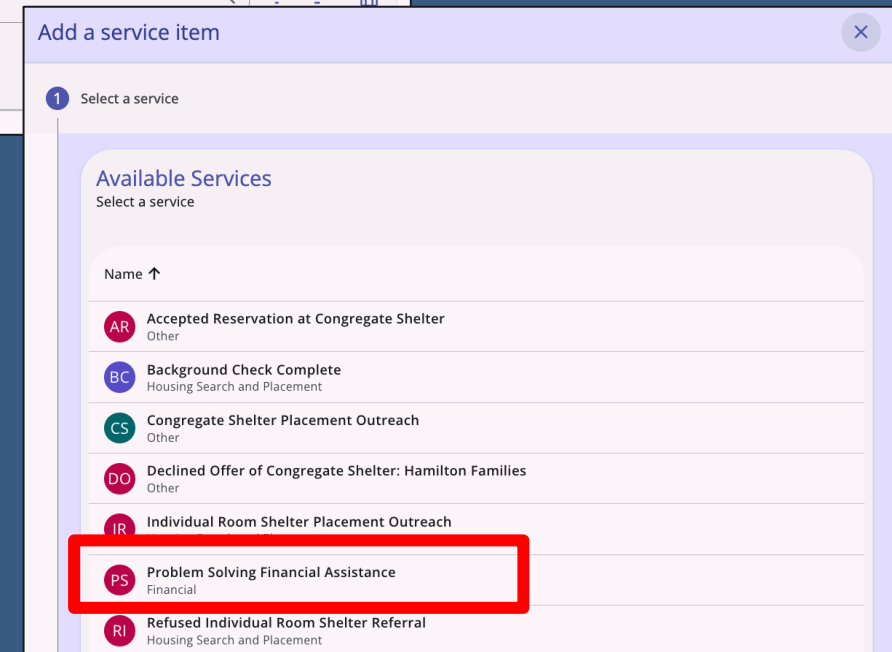
8/12/26 - Active
1 days ago

Home History Group **Services** Events Assessments Notes Files Forms Assigned Staff Exit

Services
Manage enrollment-level services / view services for the client

No results yet!
Results will be displayed here when they are available.

Problem Solving Financial
services are captured within
program enrollments



Add a service item

1 Select a service

Available Services
Select a service

Name ↑

- AR Accepted Reservation at Congregate Shelter
Other
- BC Background Check Complete
Housing Search and Placement
- CS Congregate Shelter Placement Outreach
Other
- DO Declined Offer of Congregate Shelter: Hamilton Families
Other
- IR Individual Room Shelter Placement Outreach
- PS Problem Solving Financial Assistance**
Financial
- RI Refused Individual Room Shelter Referral
Housing Search and Placement

Problem Solving Services



Remember!

If Problem Solving results in a Problem Solving resolution, you must:

1. Log the financial assistance as a **service**, and
2. Log the resolution as a conversation in the **events** tab.

Add a service item

1 Select a service

2 Select a service item

3 Provide service

Provide service

Provide Car repair, registration, smog tests, insurance, or payment, if reasonable and directly linked to housing resolution from the Problem Solving Financial Assistance service

Date

Event Date *

08/12/2026

MM/DD/YYYY

Expense

Expense Amount *

0.00

Expense Date *

08/12/2026

MM/DD/YYYY

Funding Source

General Fund

Add a coordinated entry event

1 Select an event category

2 Select an event

3 Provide Event Details

Event Category

Problem Solving/Diversion/Rapid Resolution intervention or service

Event

Problem Solving Conversation: Problem Solving Conversation

Event Date

08/12/2026

MM/DD/YYYY

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

Select

Outcome/Result

For Problem Solving Events:

If the result of Problem Solving event is “Client Housed/Re-housed in a Safe Alternative = Yes”, the household should be exited from PS/CE Program in ONE.

Add a coordinated entry event

Select an event category

Select an event

3 Provide Event Details

Event Category

Problem Solving/Diversion/Rapid Resolution intervention or service

Event

Problem Solving Conversation: Problem Solving Conversation

Event Date

08/12/2026

MM/DD/YYYY

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

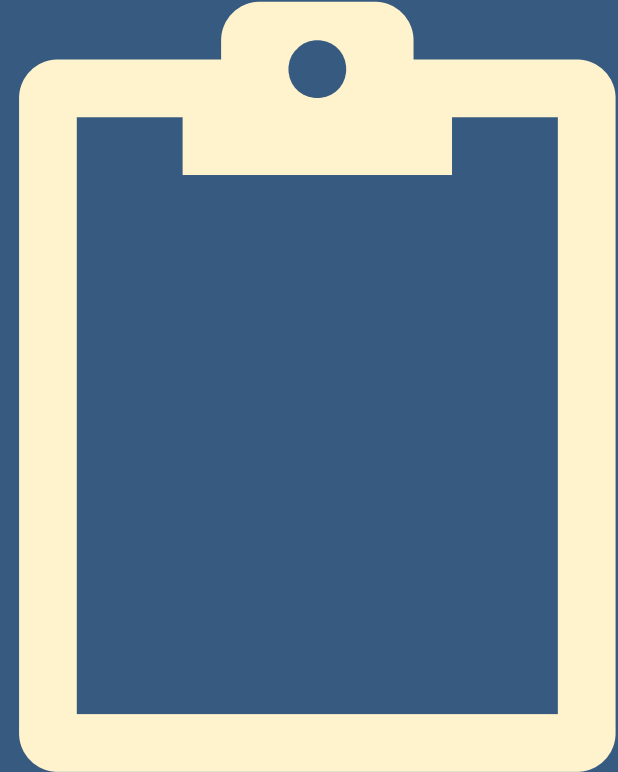
Select



Housing Primary Assessment

Housing Primary Assessment

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



Housing Primary Assessment

- Prior to completing an assessment, you should check the household's history tab to see if they have already completed an assessment
- Assessment are valid for six months
 - Do not complete a new assessment (within the six months) unless the household has changed populations
 - If the household has been exited, you need to re-enroll them prior to completing the assessment

PT Pablo Test
Expand this section to view more details about the client that this program enrollment is for.

ID 142322
SSN XXX-XX-3450

Unique Identifier 228835EA1
DOB 07/10/1990

Personal ID b226a0005b3e4edb890416c0dc08a494

History
View a history of interactions with this client

Activity	Start Date	End Date	Details
 Adult Primary CE Assessment TRAIN - San Francisco Adult Coordinated Entry Agency This entry added by Ashley Wyant from primary agency System	-	8/12/26 Today	
 Current Living Situation TRAIN - San Francisco Family Coordinated Entry Agency This entry added by Ashley Wyant from primary agency System	8/12/26 1 days ago	8/12/26 1 days ago	

Completing the Assessment in ONE

Profile
Privacy
Household
History
Programs
Services
Assessments
Units/Beds
Care Team
Notes

Program enrollments
Program enrollment history for Pablo Test

Program Name	Entry Date	Exit Date
Central City Access Point Coordinated Entry TRAIN - San Francisco Family Coordinated Entry Agency	8/12/26 1 days ago	
City Gardens - HOD PAV PH - Housing with Services (no disability required for entry) TRAIN - Abode Services	6/18/26 1 months 25 days ago	8/12/26 1 days ago
ECS: Mobile Access Point Coordinated Entry TRAIN - San Francisco Adult Coordinated Entry Agency	6/3/26 2 months 10 days ago	6/3/26 2 months 10 days ago

1

ECS: Mobile Access Point
TRAIN - San Francisco Adult Coordinated Entry Agency
Coordinated Entry

6/3/26 - 6/3/26
2 months 10 days ago

Home History Group Services Events **Assessments** Notes Files Forms Assigned Staff Exit

Program assessments
ECS: Mobile Access Point assessment history for Pablo Test

Add a program assessment

1 Select an assessment

Available Assessments
Select an assessment to add to ECS: Mobile Access Point

Name

- AP** Adult Primary CE Assessment
- CH Client Housing Refusal
- JL Job Interest Questionnaire
- PM Pre Move-In (Housing Navigation) IHSP Assessment
- PS Problem Solving Screening Tool

1 - 5 of 5

Next

2

Completing the Assessment in ONE

Add a program assessment

Select an assessment

Pablo Test assessment

Program Assessment: Adult Primary CE Assessment

Adult Primary CE Assessment data collection for Pablo Test

Assessment Location *

3rd Street Youth Access Point

Assessment Date *

08/12/2026

MM/DD/YYYY

Assessment Type *

In person

Assessment type should always be in person

Assessment Level *

Housing Needs Assessment

Assessment level should be always be Housing Needs Assessment

Completing the Assessment in ONE

Adult Housing Assessment

1) Where did you stay last night? (Living situation, not geography) *

Place not meant for human habitation

1a) Have you resided in a shelter, safe haven, or place not meant for human habitation for the last 12 consecutive months?

No

2) In the place you are staying, are you experiencing physical or sexual violence? *

No

3) How long have you been homeless this time? *

Less than one year

4) Have you resided in a shelter, safe haven, or place not meant for human habitation for more than 12 months over the last 3 years (Does not need to be consecutive)? *

No

5) How long in total have you lived in an emergency shelter or place not meant for people to sleep, including today? (Over lifetime) *

Less than one year

6) How many times in the past three 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) *

Zero times

7) How old were you when you first experienced homelessness (living in shelter, outdoors, in a vehicle or other place not mean for people to live)? *

Less than 14

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

The Remaining Fields Are Used For Statistical Purposes (No Input Necessary)

Cancel

Save

Housing Referral Status

- The score of the assessment will populate once it has been saved. The score is used to determine if a household has Housing Referral Status.
- Tell households in real time if they have Housing Referral Status
 - Do not tell the household the score of the assessment
 - For households who are not Housing Referral Status for housing, please revisit Problem Solving

The screenshot shows a web interface with two main sections. The top section, titled "Assessment Score Summary", contains a box for "Adult Priority Score Summary" with the following text: "30 - LIVING SITUATION AND HOUSING HISTORY", "9 - HEALTH STATUS AND HISTORY", "6 - INCOME", and "45 - Adult Priority Pre-Screen Total". Below this is a section titled "Community Queue Referrals" with the subtitle "View a list of the community queue referrals for the client". It features a search bar, a "No results yet!" message, and a "Program Referrals" section. A red box highlights a plus icon in the top right corner of the "Community Queue Referrals" section.

The screenshot shows a modal titled "Add Community Queue Referral". It has a close button in the top right corner. The first step, "1 Select Queue(s)", is active. It displays "Available Community Queues" with the instruction "Select the queue(s) to refer to". Below this, there is a section titled "Available Queues" with three options: "Permanent Supportive Housing Queue" (which is selected with a checkmark), "CAAP PSH Queue", and "Rapid Rehousing Queue". A red box highlights these three options. At the bottom right of the modal, there is a "Next" button. The bottom of the modal shows a progress indicator with three steps: "2 Pablo Test referral", "3 Completed", and a "Completed" status.

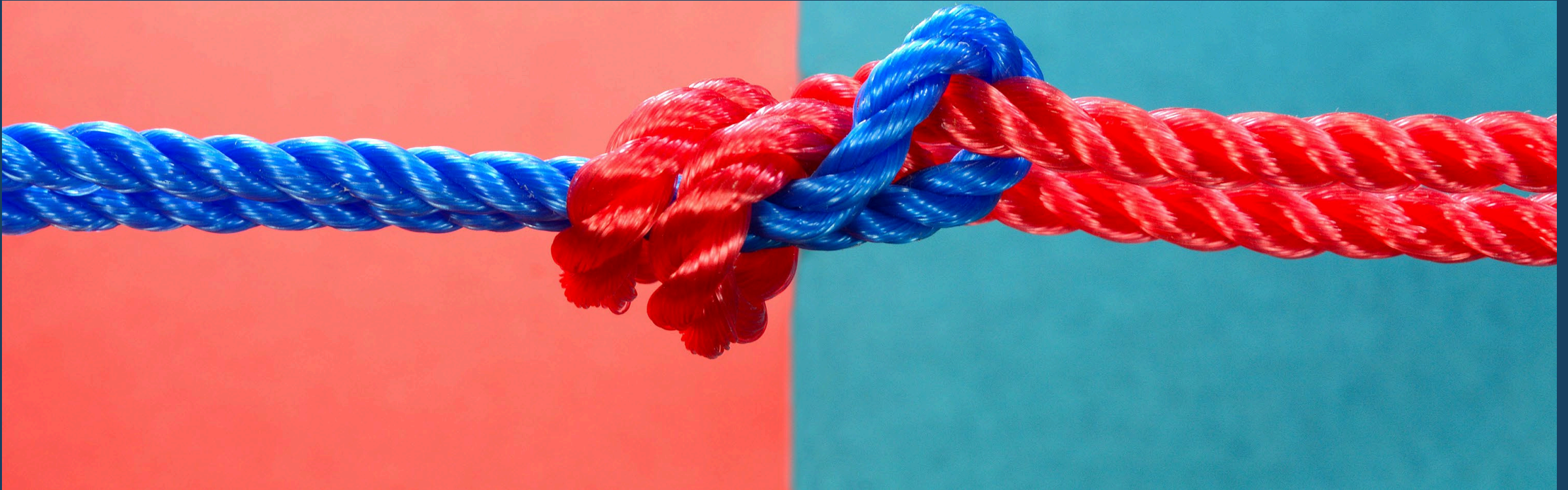
Housing Referral Status

For current Housing Referral Status criteria, please visit the Department of Homelessness and Supportive Housing – Coordinated Entry website, where the score thresholds are documented in regularly issued prioritization memos.



DEPARTMENT OF
HOMELESSNESS AND
SUPPORTIVE HOUSING

<https://hsh.sfgov.org/services/the-homelessness-response-system/coordinated-entry/>



Referrals and the Community Queue

Referrals to the Community Queue

- If the household has more than one assessment, the most recent assessment will default as the one on the queue (*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 queue and the new assessment will need to be referred

History
View a history of interactions with this client

Activity	Start Date	End Date	Details
 Referral: Permanent Supportive Housing Queue System referral to Community Queue	 8/12/26, 3:13 PM Today	 Pending	
 Adult Primary CE Assessment TRAIN - San Francisco Adult Coordinated Entry Agency This entry added by Ashley Wyant from primary agency System	 -	 8/12/26 Today	 

CQ Community Queue Referral  Pending
referral for Pablo Test 

Referral
Edit referral details

Client
Pablo Test

Referred to
Permanent Supportive Housing Queue

Referring Agency
System

Referred Date
08/12/2026 3:13 PM

Days Pending
0 days

 Reassign

 Remove From Queue

 Change Queue

 View Audit Log

 Delete

Remove from Queue

Reason for Removal *

Select a reason

Queue Removal Date *

 Time 

“Checking in” households

Checking in a household is one way to keep them active on the queue

History

View a history of interactions with this client

Activity	Start Date	End Date	Details
Referral: Permanent Supportive Housing Queue System referral to Community Queue	8/12/26, 3:13 PM Today	Pending	
Adult Primary CE Assessment TRAIN - San Francisco Adult Coordinated Entry Agency This entry added by Ashley Wyant from primary agency System	-	8/12/26 Today	

CQ

Community Queue Referral

referral for Pablo Test

Pending

Check-In

Referral

Edit referral details

Client

Pablo Test

Referred to

Permanent Supportive Housing Queue

Remember...

You must complete the new
Current Living Situation
Assessment at every direct
contact with a household





Uploading Documents

Uploading Documents into ONE

1. Go to Files tab in the client menu.
2. Click to Add (+) a new file
3. Select a category and a predefined name from the drop downs.
4. Drag and drop the file into the box or click Choose a File to choose the file from your computer you need to upload.
5. Click Save.

The screenshot displays the Bitfocus ONE interface for a client named 'Pablo Test'. On the left, a sidebar menu lists various tabs: Profile, Privacy, Household, History, Programs, Services, Assessments, Units/Beds, Care Team, Notes, Alerts, Files (highlighted), and Forms. The main content area is titled 'Client files' and shows a search bar and a message: 'No results yet! Results will be displayed here when they are available.' A red box highlights a '+' icon in the top right corner of the 'Client files' section. Overlaid on the right is the 'Add File' modal. This modal contains a 'New File' section with two dropdown menus: 'Category *' set to 'Personal Identification' and 'Predefined Name *' set to 'Social Security Card'. Below these is a 'File *' section with a large dashed box containing an upload icon and the text 'Drag and drop a file here' or 'Choose A File'. At the bottom of the modal, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box. Accepted file formats and a 25Mb max size limit are listed at the bottom of the modal.



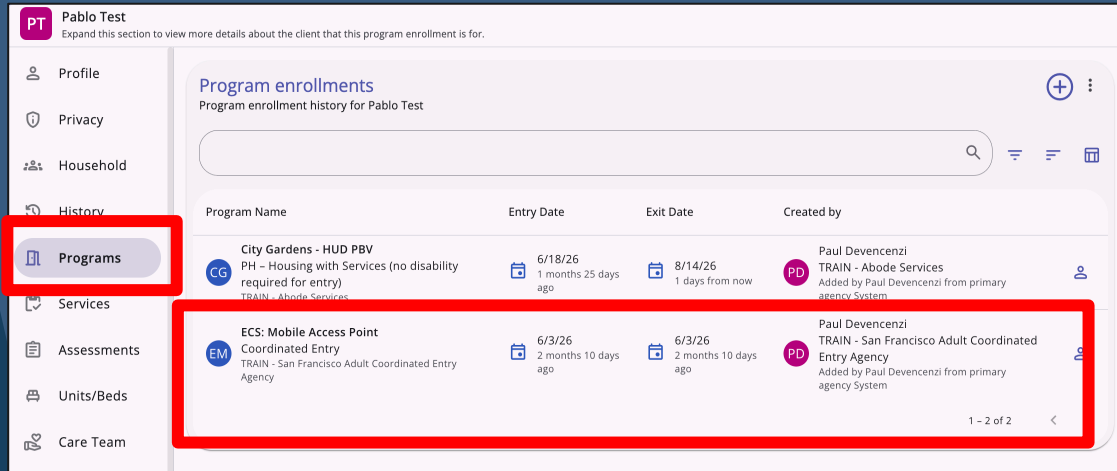
Exiting Clients

Exits

- Access Point staff are responsible for exiting households from the CE program
- Household should be exited from CE for the following reasons:
 - Successfully problem solved
 - Been housed by CE
 - Known to be housed
 - Deceased
 - Household is lost to follow up (no contact in 90 days)
 - No longer experiencing homelessness in San Francisco
 - Declined three housing offers
 - Staff entering third refusal should exit household

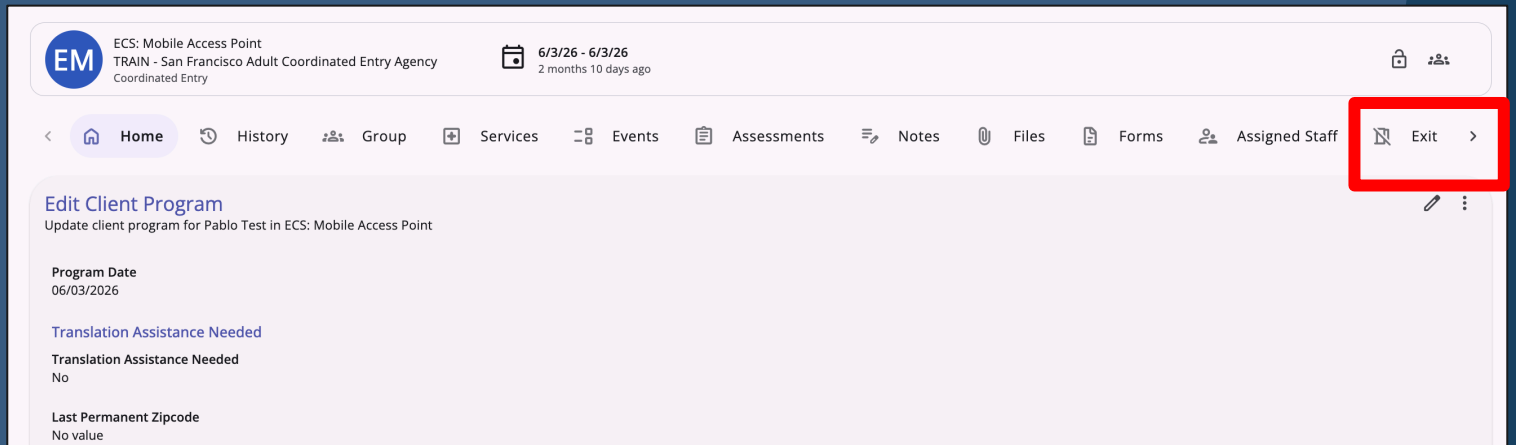


Exits



1

To exit a client from a program, click on the *Programs* tab on the client navigation menu, click on the program enrollment



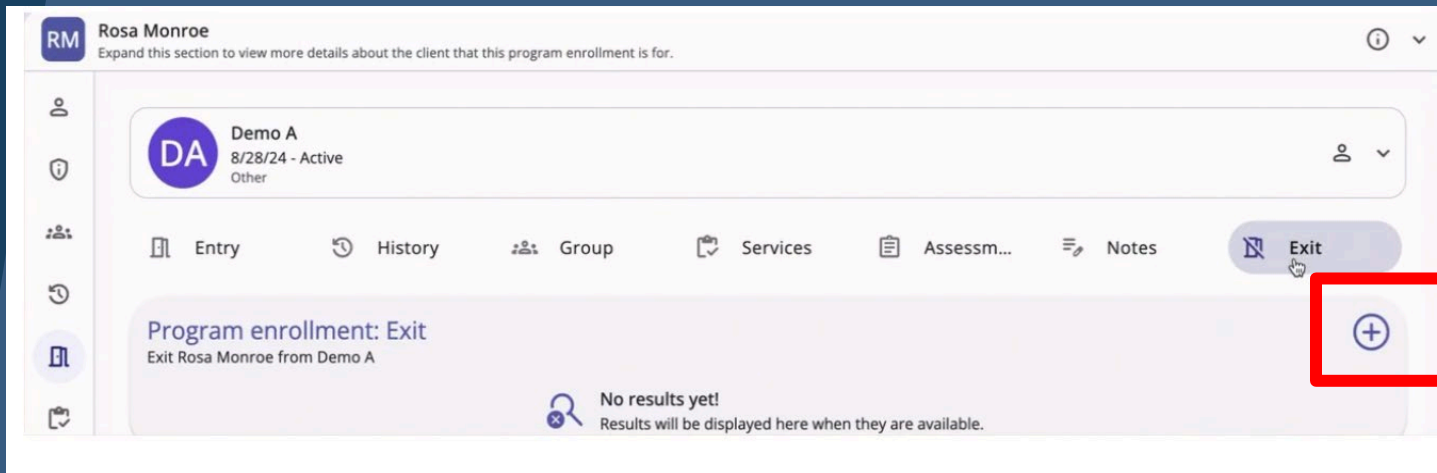
2

Click the *Exit* tab within the enrollment

Exits

3

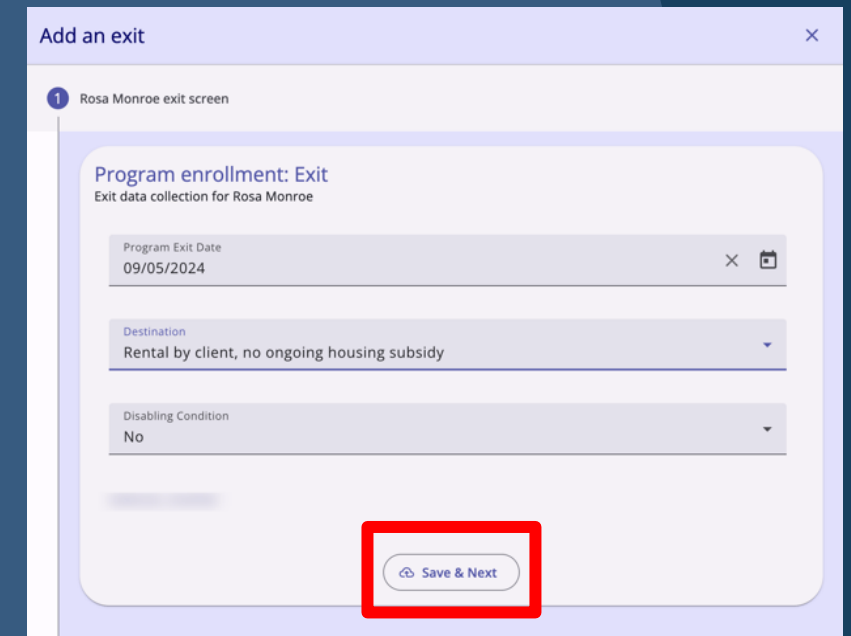
From within the Exit tab, click the *Add* icon.



The screenshot shows the 'Rosa Monroe' client profile in a software interface. The 'Exit' tab is selected in the bottom navigation bar. Below the tab, there is a section titled 'Program enrollment: Exit' with the subtitle 'Exit Rosa Monroe from Demo A'. A red box highlights a plus icon (+) in the bottom right corner of this section, indicating where to click to add a new exit record.

4

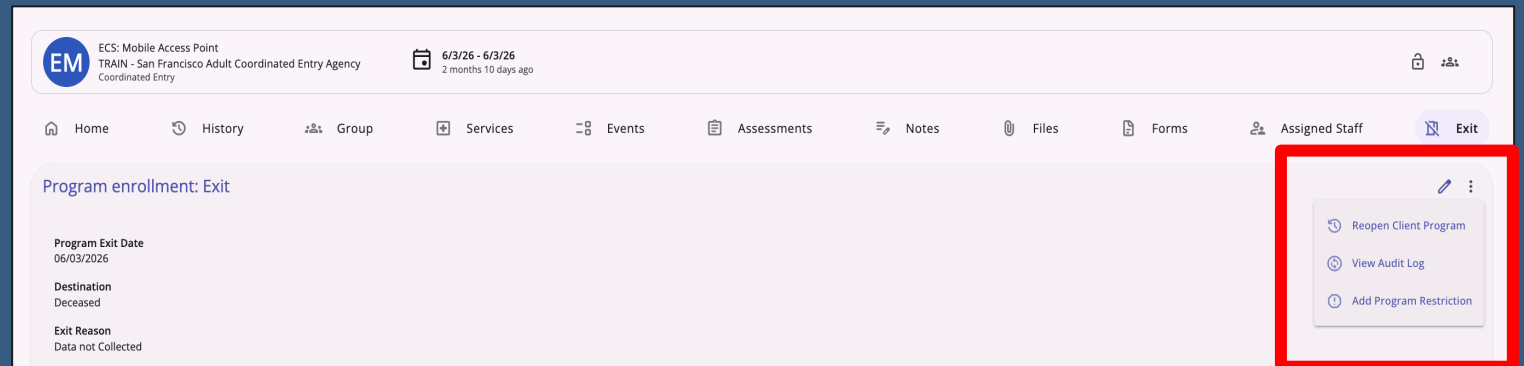
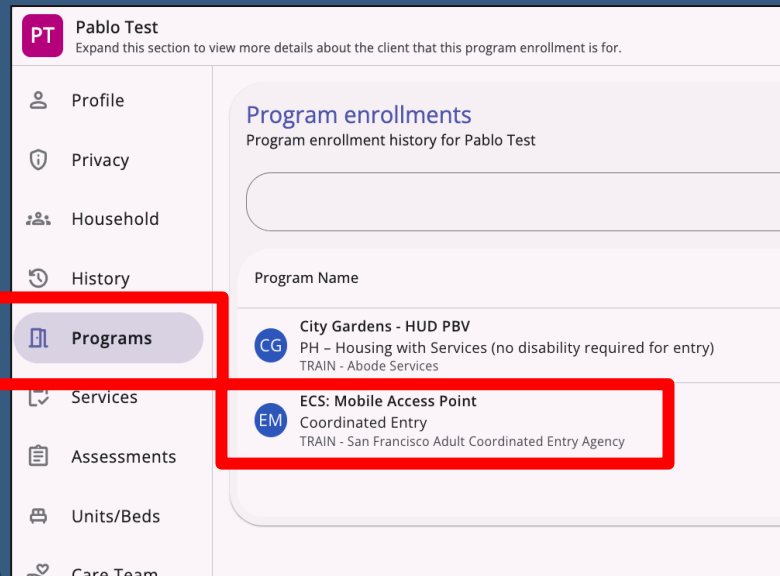
Complete the exit screen and then click *Save & Next*. Click *Complete* to finish the task.



The screenshot shows the 'Add an exit' form for 'Rosa Monroe'. The form is titled 'Program enrollment: Exit' and 'Exit data collection for Rosa Monroe'. It contains three input fields: 'Program Exit Date' (09/05/2024), 'Destination' (Rental by client, no ongoing housing subsidy), and 'Disabling Condition' (No). A red box highlights the 'Save & Next' button at the bottom right of the form.

Removing Exits

- If a household has been auto-exited but re-engages prior to the 6-month expiration of their assessment, you will need to reactivate their program enrollment.
- Click the three dots in the right corner of the Exit screen and select “Reopen Client Program” from the menu.



Auto -Exits

Auto-exits from Coordinated Entry programs may occur if:

- The household is designated in the ONE System as permanently housed.
- A household enrolled in the CE program has no activity in ONE for 90 days.

In the case of auto-exit, the Exit Destination is 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 household is referred to a PSH program.
The household is enrolled in the program with a move-in date of 7/30/26.

Auto-Exit from CE = YES

Example 2

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

Auto-Exit from CE = NO

The household 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 Coordinated Entry program enrollment after 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	180 Days	If a client has been referred to a housing program and the referral sits pending for more than 180 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	6 Months	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 Coordinated Entry program	

Resources

ONESF Help Center Website

onesf.bitfocus.com/coordinated-entry

Bitfocus Helpdesk

onesf@bitfocus.com

415.429.4211