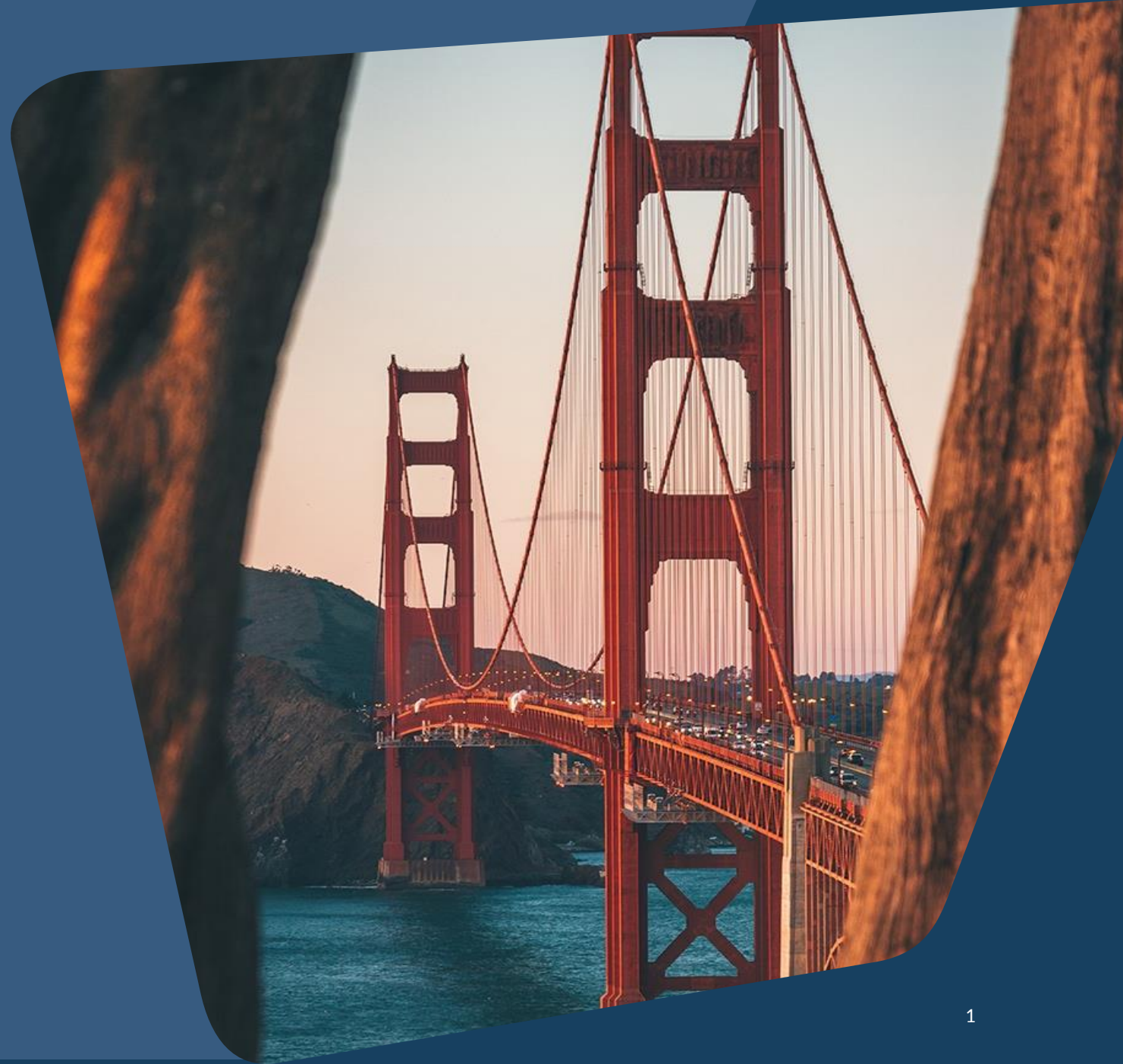


Monthly Agency Leads Meeting

San Francisco | June 2025



AGENDA

Ice Breaker

Federal Reporting Season - Done!

Auto Exit Thresholds

New Feature! Check In Button Location

ICE BREAKER!

What is your go-to music at home or in the office?

Please include:

- > Your Name
- > Pronoun
- > Your Agency



Federal Reporting season has ended...for now.

**HIC/PIT
Submitted!**



Till next time...

- Continue to review data quality.
- Run Reports Regularly
- Reach out for support if you have questions!

Auto Exit Thresholds

What counts as client activity?



Auto Exit Thresholds

Client Activity

Coordinated Entry Enrollments

- Adding/editing a program level Service or Event
- Adding/editing a program level CE Assessment
- Adding/editing a:
 - o Status Assessment
 - o Annual Assessment
 - o Current Living Situation Assessment
- Adding/editing a Unit to the program enrollment
- Adding/editing a location to the Location tab
- Adding/editing a contact to the Contact tab

Community Queue

- Adding/editing a Service or Event (client level and program level)
- Adding/editing a CE Assessment (client level and program level)
- Adding/editing a:
 - o Status Assessment
 - o Annual Assessment
- Adding/editing a contact to the Contact tab
- Adding/editing a location to the Location tab
- Adding/editing a File (client level and program level)
- Adding/editing a note (client level and program level)
- Adding/editing an alert
- Enrolling a client into a program or editing a client enrollment
- Exiting a client from a program or editing a client exit
- Creating a direct program referral
- Selecting the “CHECK-IN” button within the referral

Referral

- Changing the Referral Status from “Pending” to “Pending – In Process” (Note: once a referral is set to “Pending – In Process,” it never automatically expires)

Auto Exit Thresholds

Category	Program/Queue	Auto Exit Threshold
CE Program Enrollment	All CE Programs	90 Days
Queue	CAAP PSH Queue	90 Days
	PSH Queue	
	RRH Queue	
	Temporary Shelter Queue	
	Transfer Queue (HSH Only)	180 Days
	SFHA – EHV	720 Days
Pending Program Referral	CAAP Queue	180
	PSH Queue	
	RRH Queue	
	Transfer Queue (HSH Only)	
	Temporary Shelter Queue	90
	SFHA- EHV	1 Day

New Feature!

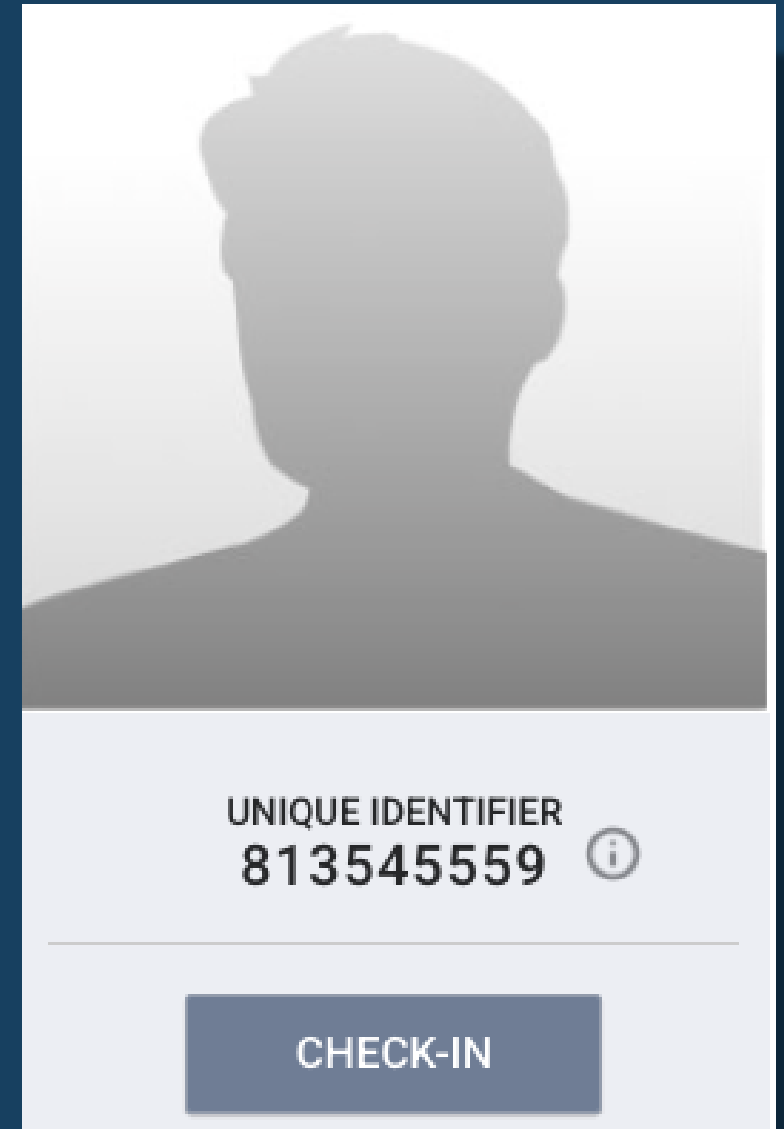
Check-in Button for Client Profile

The **CHECK-IN button** will be visible on the client profile screen below the client's unique identifier if:

- The client has a referral to a community queue and/or at least one direct program referral (i.e. , referrals that came from the [Referrals tab](#) or the [Eligibility Determination page](#))

AND

- there is at least one “VIEW DETAILS” link



QUESTIONS?





Don't forget about Office Hours!

- ONE System Office Hours occur every 4th Tuesday of the month at 2pm
- Available to everyone who is a user of the ONE System
- No problem too big, no question too small!
- Register at [bitfocus.zoom.us/meeting/register/tZcrce-rqTouHNZejrOoeyxlqx7faH4_LdNK#/registration](https://bitfocus.zoom.us/join/tZcrce-rqTouHNZejrOoeyxlqx7faH4_LdNK#/registration)

Thank You From Your SF Team!



Regina Abadajos
Senior Project
Administrator
rabadajos@bitfocus.com



Paul Devencenzi
Deputy Project
Administrator
pauld@bitfocus.com