



Coordinated Entry

Family Access Point ONE System Training

Learning Objectives

Learn the Family Coordinated Entry (FCE) workflow in ONE

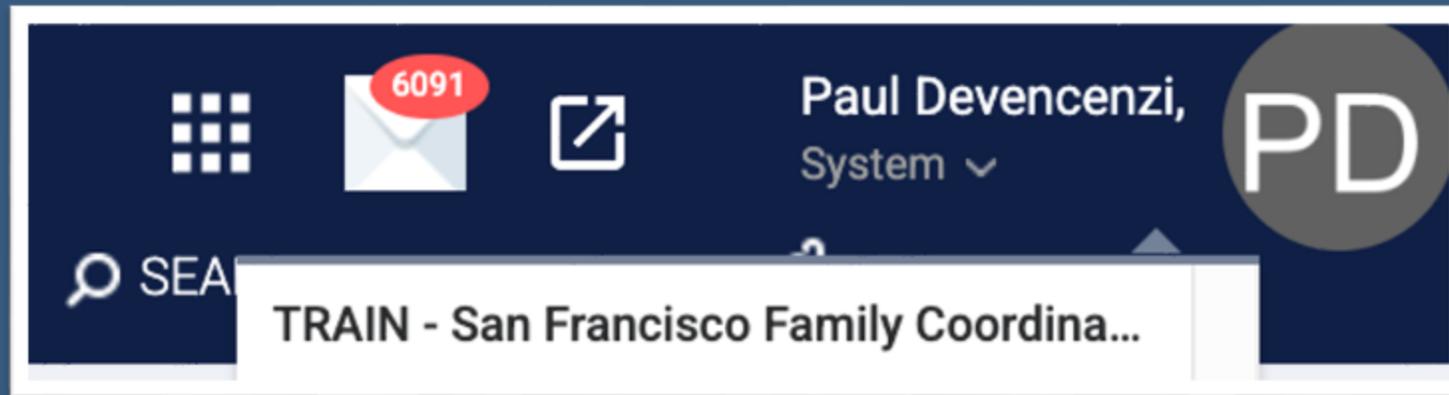
Understand ONE System functions as they relate to FCE



Navigating the ONE System

Navigating ONE

Family Coordinated Entry work should be completed under the **San Francisco Family Coordinated Entry Agency**



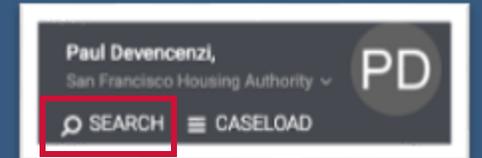
If you have access to multiple agencies, you will need to switch to the **San Francisco Family Coordinated Entry Agency** from your additional agency dropdown list in the upper right corner of the ONE System



Client Profiles

Looking up households in ONE

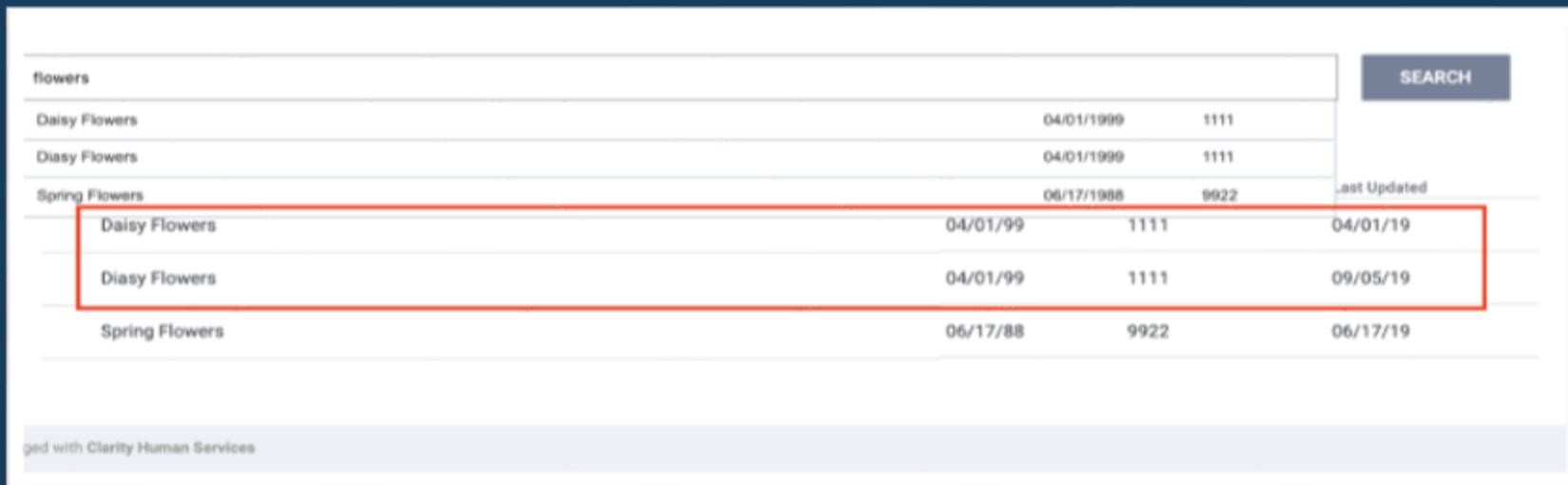
- Search for household/ head of household
 - Search by name, DOB and SSN
 - Easiest to search clients by the first 3 letters of their first and last name or last 4 of their SSN
- If you look up all three identifiers and are unable to find head of household, create a new profile
- Can always go back to this page using the *Search* button beneath your name

A screenshot of a search interface. At the top, it says 'SEARCH FOR A CLIENT'. On the right side, there is an 'ADD CLIENT' button with a plus sign. Below this is a search input field with the placeholder text 'Search by name, partial name, DOB or SSN' in red. To the right of the input field is a 'SEARCH' button. Below the input field, there is a small text instruction: 'Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.' At the bottom left, it says 'tagged with Clarity Human Services', and at the bottom right, there is a link to 'Recover deleted data'.

Duplicate Profiles

→ If there are multiple profiles in ONE for a client:

- Please contact the Bitfocus Help Desk (onesf@bitfocus.com) to get the records merged together
- Provide the unique identifiers for each profile and identify the profile to be retained
 - Make sure you do not include client Personal Identifiable Information in the email



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

ged with Clarity Human Services

Creating New Profiles

- After you search for a client by name, DoB and SSN and do not find a profile, you can create one for them
- Go to the ONE System search page and locate the “Add Client +” button right above the search bar
 - Click on the button to open the Create A New Client Screen
- Here you can enter details about the client and complete their digital **Release of Information**

RELEASE OF INFORMATION

Permission	Yes	▼
Start Date	05/06/2025	📅
End Date	05/06/2028	📅
Documentation	Select	▼

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

SEARCH FOR A CLIENT

ADD CLIENT +

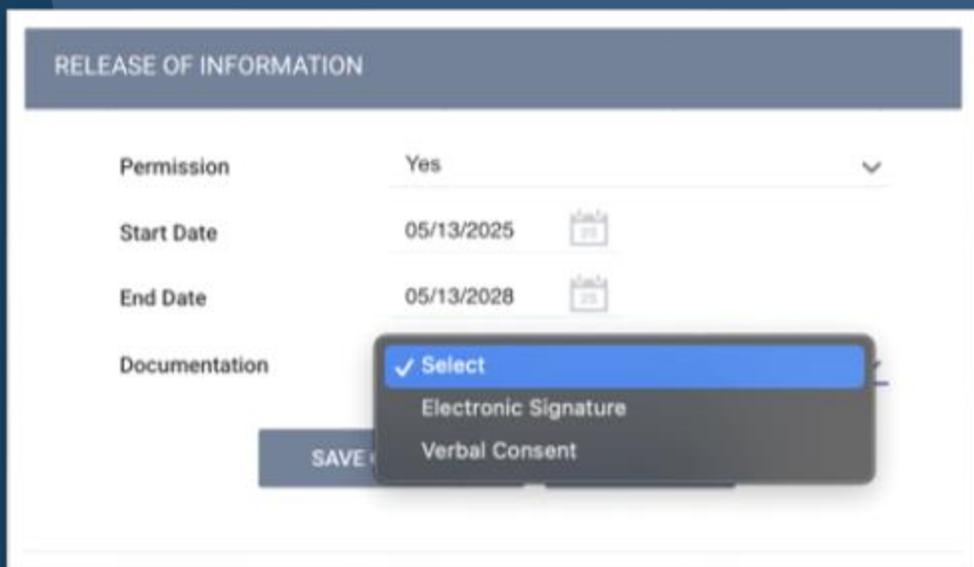
SEARCH

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

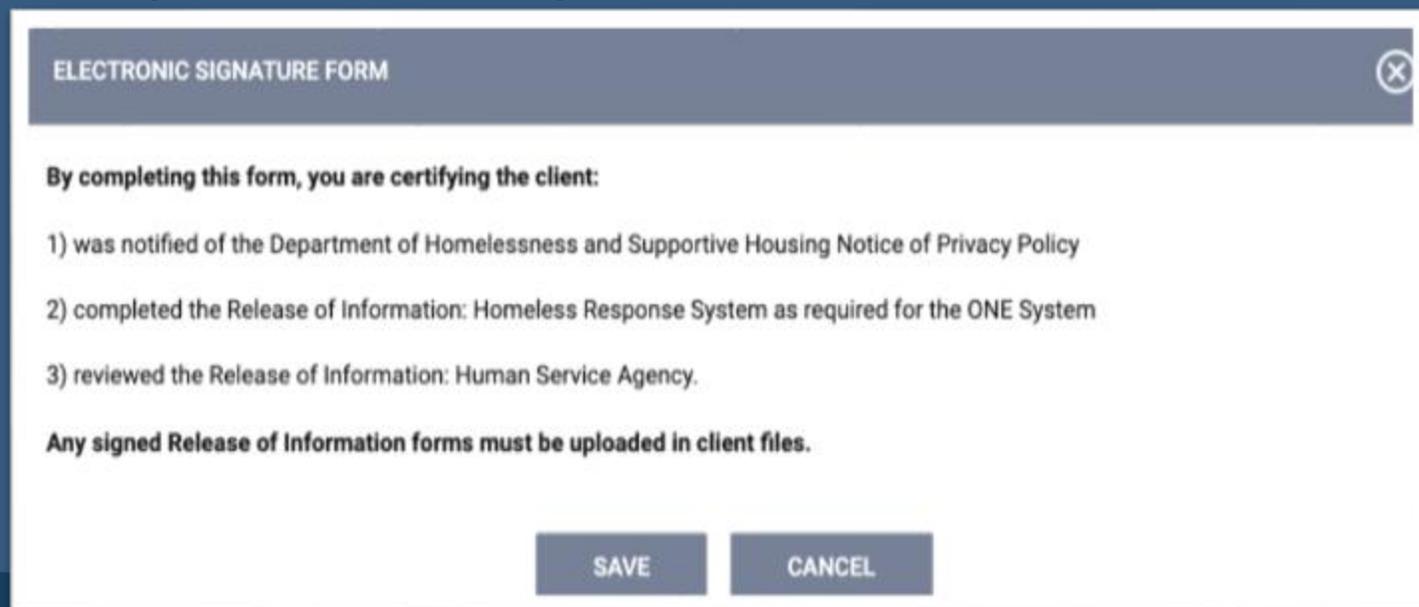
Release of Information

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.
 - Do not change the end date of the Release of Information from 3 years
 - Add a new Release of Information if the previous one is expired



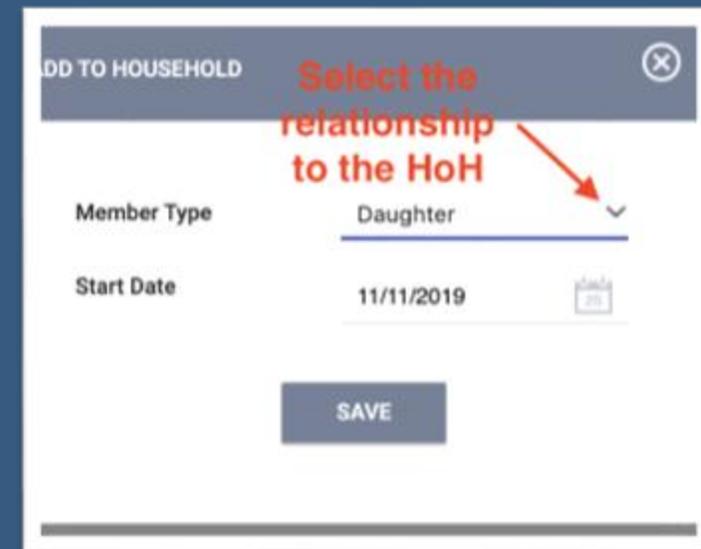
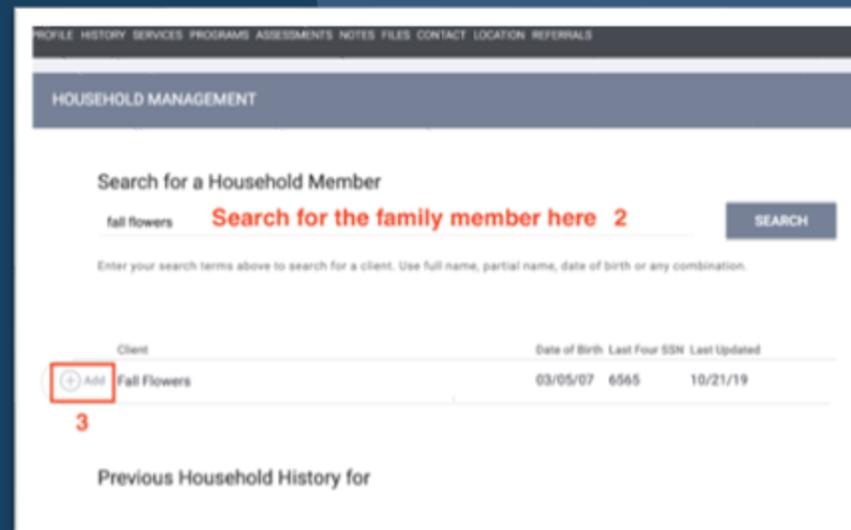
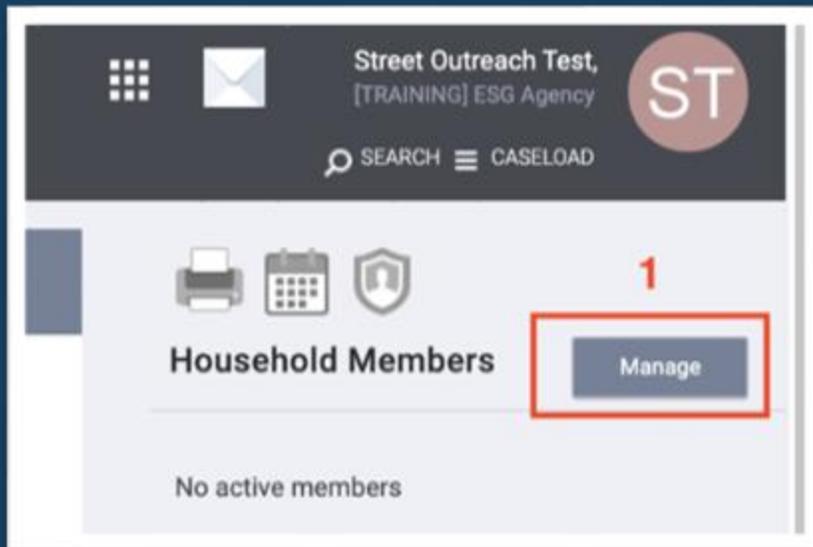
The screenshot shows a form titled "RELEASE OF INFORMATION". It has several fields: "Permission" set to "Yes", "Start Date" set to "05/13/2025", and "End Date" set to "05/13/2028". The "Documentation" field is currently open, showing a dropdown menu with options: "Select" (highlighted with a checkmark), "Electronic Signature", and "Verbal Consent". A "SAVE" button is visible at the bottom left of the form.



The screenshot shows a form titled "ELECTRONIC SIGNATURE FORM". It contains the following text: "By completing this form, you are certifying the client:" followed by a numbered list: "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", and "3) reviewed the Release of Information: Human Service Agency." Below the list, it states: "Any signed Release of Information forms must be uploaded in client files." At the bottom right, there are "SAVE" and "CANCEL" buttons.

Creating a Household

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



Managing a Household

- If the family composition changes, you may need to add or remove (exit) family members from the household or change their membership type
- You can edit a household through a **client's profile page**

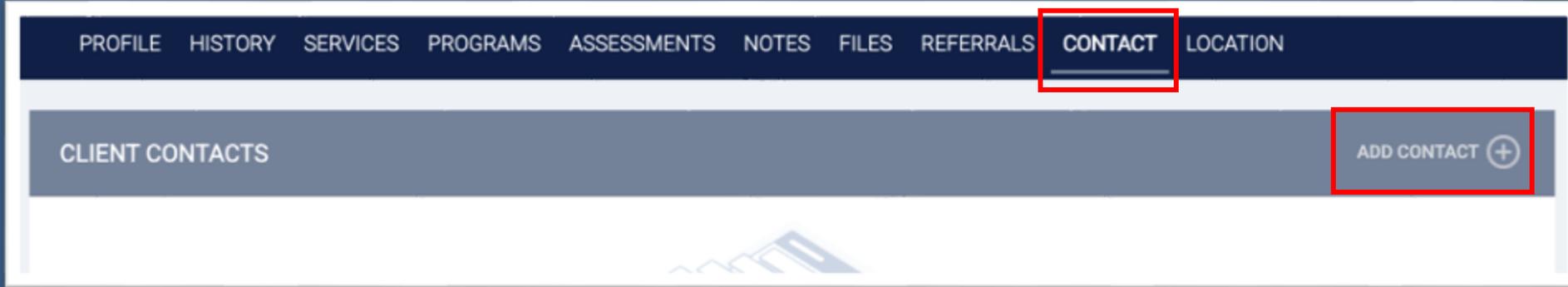
The screenshot displays a software interface for managing households, divided into three main sections:

- Left Panel:** Features a search bar and a 'CASELOAD' menu. Below are icons for a printer, calendar, and shield. A 'Household Members' section includes a 'Manage' button, which is highlighted by a red arrow. Below this, a table lists 'Springtime Flowerchild' as a 'Daughter'. An 'Active Programs' section is also visible.
- Middle Panel:** Titled 'Household Members', it lists 'Spring Flowers' as a 'Mother' and 'Springtime Flowerchild' as a 'Daughter'. A red arrow points to an edit icon (pencil) next to the 'Daughter' entry. Below the list is a section for 'Your recent client searches accessed:'.
- Right Panel:** A modal window titled 'EDIT GLOBAL HOUSEHOLD' with a close button. It contains several fields: 'Member Type' (Daughter), 'Head of Household' (Spring Flowers), 'Joined Household' (06/17/2019), and 'Exited Household' (a toggle switch, which is highlighted by a red box). Below these is an 'Enter Date' field and a 'SAVE' button.



Contact and Location Information

Update Contact Information



ADD CONTACT

Contact Type Client ▼

Email _____

Phone (#1) XXX-XXX-XXXX

Phone (#2) XXX-XXX-XXXX

Active Contact

Private

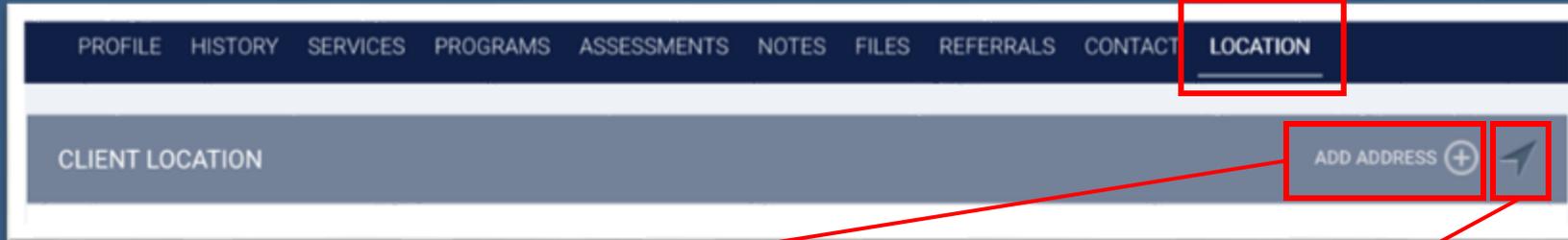
Contact Date ____/____/____ 

Note

B **I**  

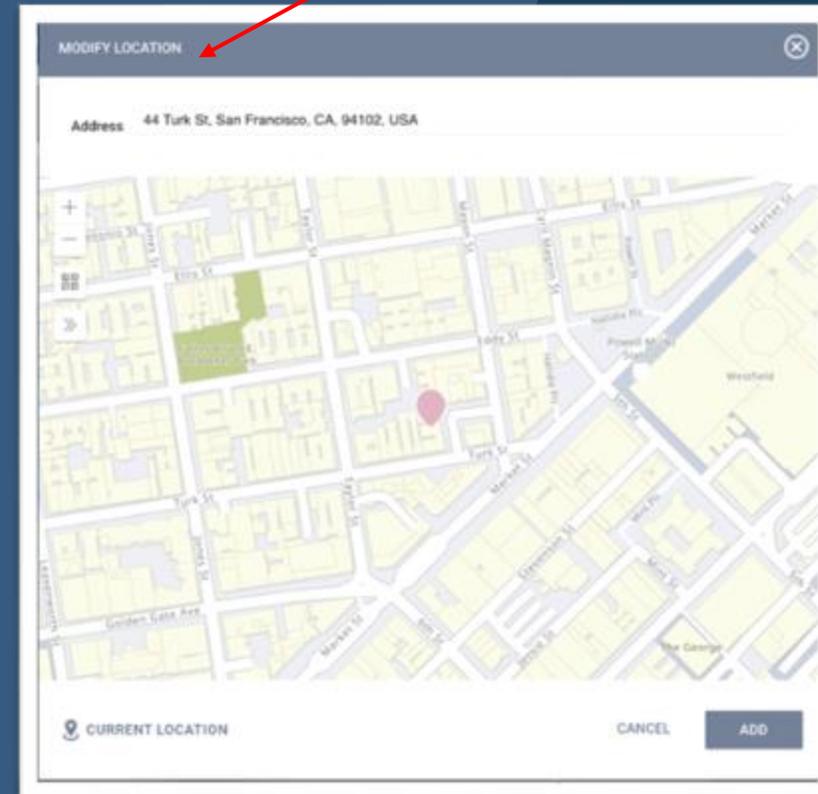
- ✓ Client
- Aunt/Uncle
- Client Supplied
- Case Manager
- Child
- Client- Work
- Client- Cell
- Doctor
- Employer
- Emergency Contact
- Friend
- Grandparent
- Guardian
- Niece/Nephew
- IHSS Provider
- Parent
- Sibling

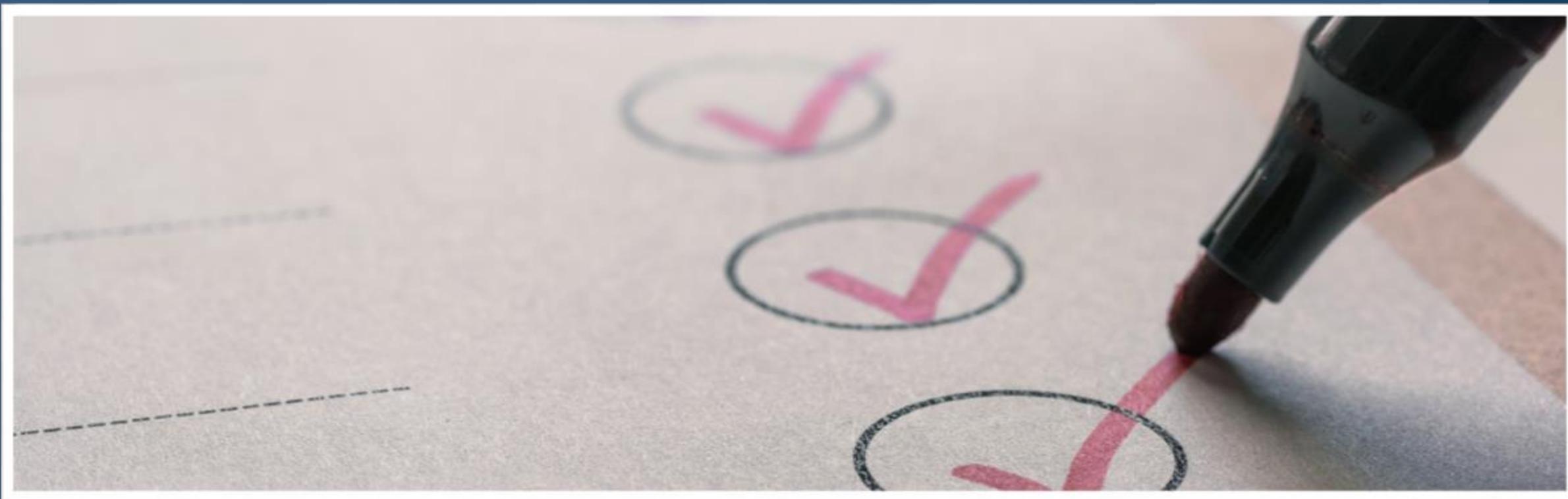
Update Contact Location



This screenshot shows the 'ADD CLIENT LOCATION' form. It includes the following fields and controls:

- Address Type: Select
- Name: Text input field
- Address: Text input field with an ADD LOCATION button to its right
- Address (line 2): Text input field
- Location Date: Date picker
- Active Location: Toggle switch (currently turned on)
- Private: Toggle switch (currently turned off)
- Note: Text area with formatting options (B, I, list, link)





Eligibility Assessment

Eligibility Assessment

Pablo Program

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

ASSESSMENTS

Pandemic Prioritization Assessment (HSH Staff Only)

SF Family Eligibility Assessment

SF FAMILY ELIGIBILITY ASSESSMENT

Assessment Date 05/06/2025

SAN FRANCISCO HOMELESS FAMILY ELIGIBILITY ASSESSMENT

Family Status Adult(s) with physical and legal custody of minor child(ren) ▼

Where did you stay last night? Where did you stay for the last 7 nights? Some or all nights in San Francisco ▼

Do you have children in school, preschool, or childcare in San Francisco? No children in SF school, preschool, or childcare ▼

Head of household is under 25 and has been in foster care in San Francisco (i.e., a ward of this county)? No ▼

Family Situation Primary nighttime residence that is a public or private place not meant... ▼

ELIGIBILITY ASSESSMENT RESULTS (NO RESPONSE NEEDED):

***** SF Homeless Family ▼

- Completed for all Heads of Households (HoH) trying to access Family CE
 - This is a client level assessment
- Completed prior to enrolling the client in CE
- Assesses a family's eligibility; only clients who are eligible should be enrolled in a FCE program



Coordinated Entry Enrollment

CE Enrollment

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

Emergency Shelter - Entry Exit
TRAIN - Homeless Prenatal Program ⓘ

Embarcadero SAFE Navigation Center - GF+HEAP
Emergency Shelter - Entry Exit 02/11/2025 02/11/2025 Individual
TRAIN - Five Keys Charter Schools & Programs ⓘ

City Gardens - Prop C
PH - Housing with Services (no disability required for entry) 11/15/2024
TRAIN - Abode Services ⓘ

PROGRAMS: AVAILABLE

Bayview Access Point	
Central City Access Point	
HSH Staff	
Mission Access Point	

Bayview Access Point

Active Clients



16 CLIENTS

- 56 % Families
- 44 % Individuals

Funding Source: N/A

Availability: No Availability

Service Categories:

- ✓ No Category
- ✓ Financial
- ✓ Case Management
- ✓ Transportation
- ✓ Housing Search and Placement
- ✓ Other
- ✓ RETIRED (Coordinated Entry Event)

Include group members:

- Momo Houser
- Annie Prescott

PRINT DIRECTIONS

ENROLL

Make sure to include all relevant household members in the enrollment

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.

"Data not collected" implies that the question was not asked, if a client does not know an answer put "client does not know"

SAVE & CLOSE CANCEL

Audit Log

ed with Clarity Human Services

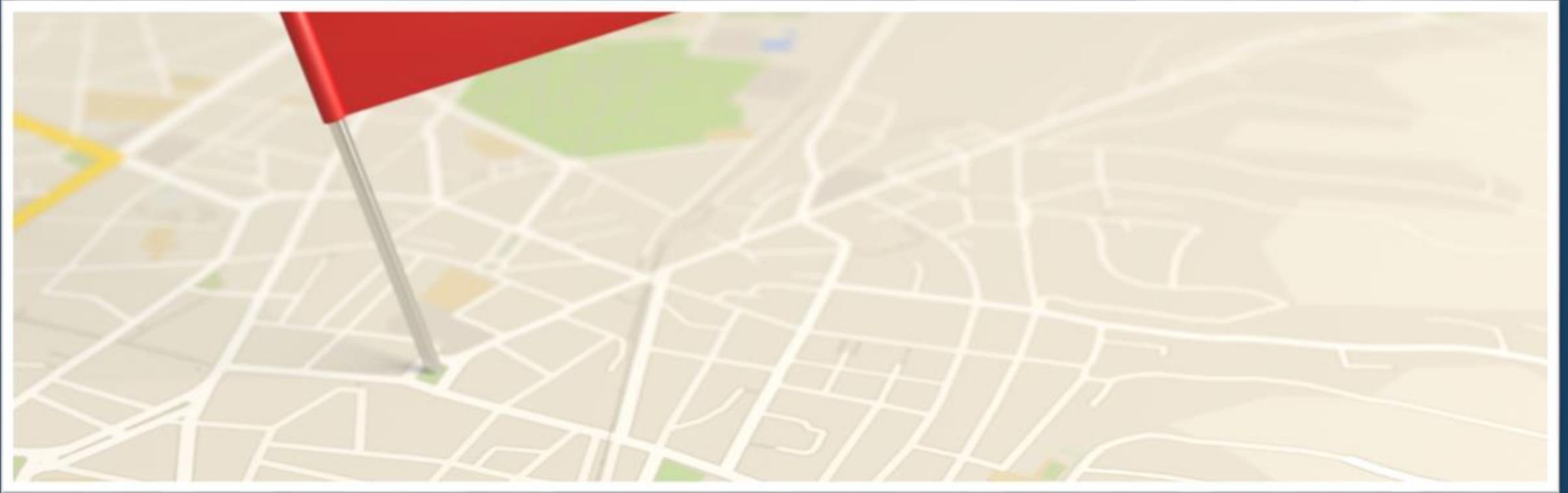
CE Enrollment

DISABLING CONDITIONS AND BARRIERS

Disabling Condition	Yes	▼
Physical Disability	No	▼
Developmental Disability	No	▼
Chronic Health Condition	No	▼
HIV - AIDS	No	▼
Mental Health Disorder	No	▼
Substance Use Disorder	No	▼

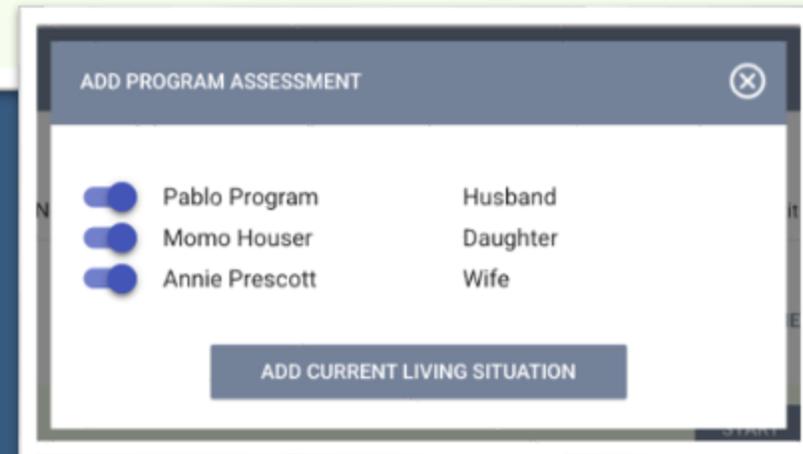
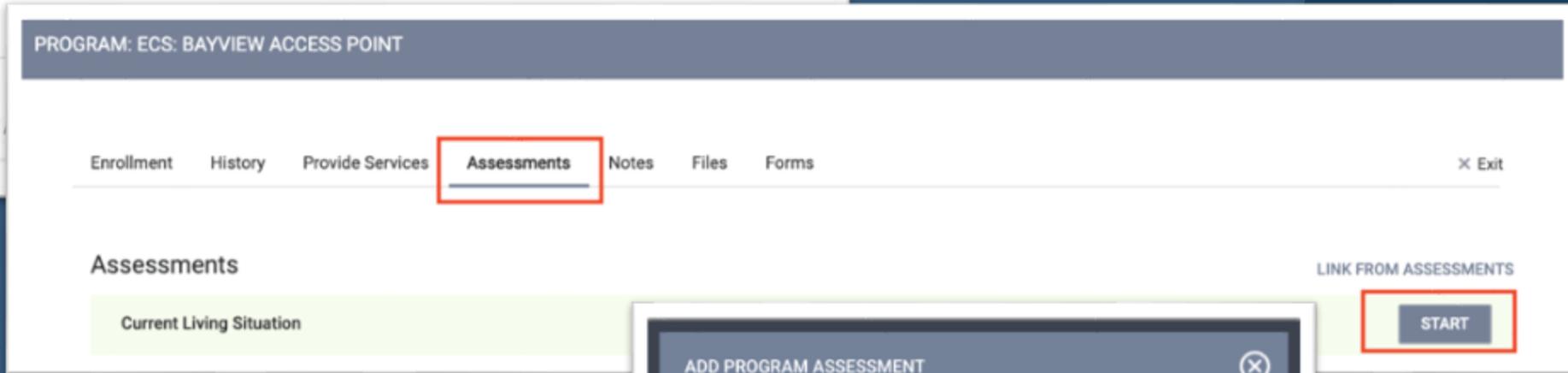
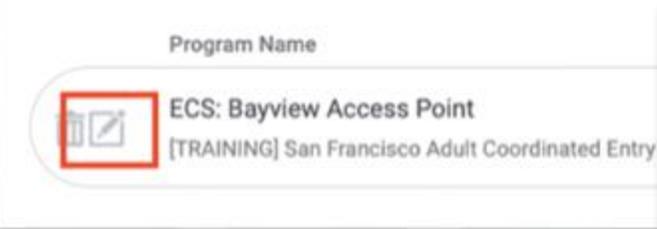
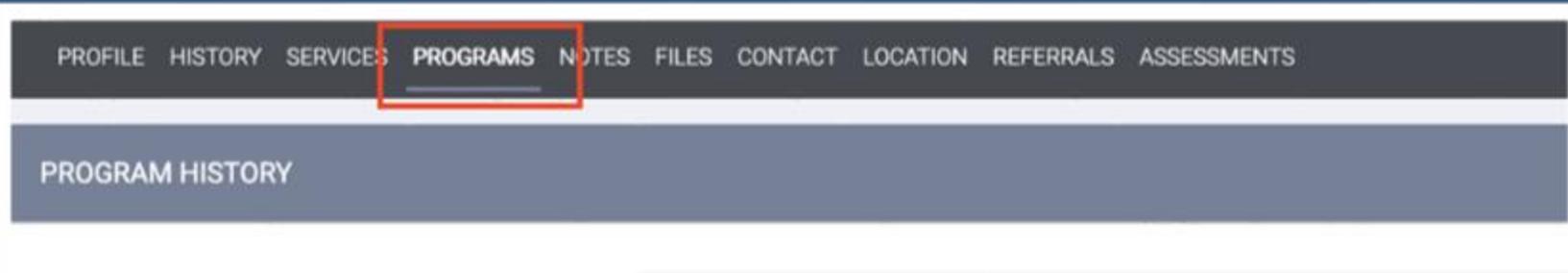
⚠ Disabling Condition is set to "Yes", but no disability type has been selected. Please update the Disabling Condition field or select at least one disability type, as appropriate.

- Make sure your disabling conditions match what you enter on the disabling conditions toggle
 - If you answer "Yes" to any disabling conditions, make sure *Disabling Condition* also says "Yes"
 - If the client has no disabling conditions, make sure the Disabling Conditions say "No"



Current Living Situation

Current Living Situation Assessment



- Click into the client's Access Point enrollment to complete a Current Living Situation Assessment under the **Assessment tab at the program level**
- Make sure to include all household members in the assessment.

Current Living Situation Assessment

- Complete the Current Living Situation Assessment by filling out the field
- The **Living Situation Verified By** field is where you will enter the name of the Access Point program that is entering the CLS data.
 - You will find all FCE Access Points under *Coordinated Entry* > *SF Family Coordinated Entry Agency*
 - Homelessness is self reported

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] FOC Agency

Clarity Human Services

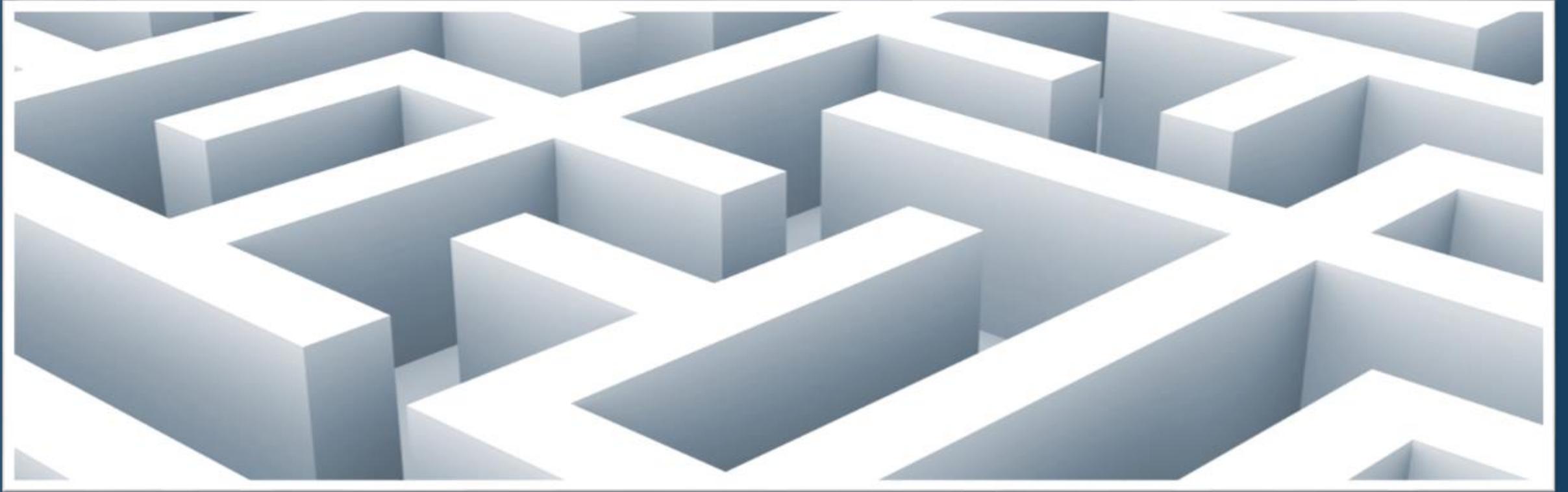
Current Living Situation Assessment

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	<input type="text"/>

- Fields may auto populate with information from the most recent CLS
- Please verify all information so ensure it is still accurate and update as needed



Problem Solving

- For any Problem Solving questions please contact your HSH Problem Solving Program Manager



Family Housing Prioritization Assessment

Completing the Assessment in ONE

Program Name	Start Date	End Date	Type
Street Outreach (Non-PATH) Street Outreach TRAIN - HSH - SFHOT ⓘ	05/09/2025	Active	Individual
 Bayview Access Point Coordinated Entry TRAIN - San Francisco Family Coordinated Entry Agency ⓘ	05/06/2025	Active	Group

This is a program level assessment

- Only the **HoH** for an eligible family should be given a Family Housing Prioritization Assessment.
- This assessment will determine if a household is eligible for a housing referral
- This assessment can be found within the Access Point program enrollment.
 - You must be under the SFFCE agency to give this assessment

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)

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

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

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?

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)?

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

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

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

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

“Data not collected” implies that the question was not asked; if a client does not know an answer select “client does not know”

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

Multiple Community Queues

→ San Francisco has multiple Community Queues that clients can be referred to:

- Permanent Supportive Housing Queue
- Rapid Rehousing Queue
- Temporary Shelter Queue

→ 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
- Which Community Queue is available will depend on the assessment they are given and what the score for their assessment is.

Family Housing Prioritization Assessment

Fam Priority Score Summary			
LIVING SITUATION AND HOUSING HISTORY	12		
HEALTH STATUS AND HISTORY	0	INCOME	3
CHRONIC HOMELESSNESS	0		
Fam Priority PRE-SCREEN TOTAL 15			

Permanent Supportive Housing Queue

Rapid Rehousing Queue

REFER DIRECTLY TO COMMUNITY QUEUE(S)

Family Shelter Assessment

Fam Shelter Score Summary			
CURRENT LIVING SITUATION	0		
DOMESTIC VIOLENCE	0	NUMBER OF DISABILITIES	6
PREGNANCY	0	HOUSEHOLD COMPOSITION	0
Fam Shelter PRE-SCREEN TOTAL 6			

Temporary Shelter Queue

REFER DIRECTLY TO COMMUNITY QUEUE(S)

Referring to the Community Queue (CQ)

- If a client's score reached the referral threshold, they can be referred to the PSH Queue.
- Toggle on the PSH queue and make sure the referral date and time is correct on the next screen
- Add any relevant notes to the referral as necessary

PROGRAM ELIGIBILITY DETERMINATION

Fam Priority Score Summary

LIVING SITUATION AND HOUSING HISTORY	63		
HEALTH STATUS AND HISTORY	33	INCOME	3
CHRONIC HOMELESSNESS	15		

Fam Priority PRE-SCREEN TOTAL 114

Permanent Supportive Housing Queue

Rapid Rehousing Queue

REFER DIRECTLY TO COMMUNITY QUEUE(S)

Referral Date 05/08/2025 3:45 PM

Send to Queues Permanent Supportive Housing Queue

Referred Program Community Queue

Referred to Agency Community Queue

Referring Agency TRAIN - San Francisco Family Coordinated Entry Agency

Private

SEND REFERRAL **CANCEL**

Referrals to the CQ

- A referral's assessment score will update if a new assessment is conducted while the client is on the queue, or if the original is edited.
 - If a client is already on a CQ, do not complete a new Family Prioritization Assessment unless their household composition changes
- A client's referral can be removed if you click in to edit the referral, add a reason for the referral's removal, and click save changes

The screenshot displays a software interface for a 'Pablo Program'. The top navigation bar includes 'PROFILE', 'HISTORY' (highlighted with a red box), 'SERVICES', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'REFERRALS', 'FILES', 'CONTACT', and 'LOCATION'. Below the navigation bar, the 'HISTORY' section is active, showing a table of services and a referral entry.

Service Name	Start Date	End Date
Family Shelter Expected Exit Date (only create once and update as extensions are ... TRAIN - Compass Family Services ⓘ	07/18/2025	07/18/2025
Referral: Permanent Supportive Housing Queue TRAIN - San Francisco Family Coordinated Entry Agency referral to Community Queue ⓘ	05/08/2025 03:45 PM	Pending

Overlaid on the right side of the screenshot is a 'REMOVE FROM QUEUE' dialog box. It contains the following fields:

- Reason for Removal: -- Select Reason -- (dropdown menu)
- Queue Removal Date: 05/08/2025 3:45 PM (calendar icon)

At the bottom of the dialog box are two buttons: 'SAVE CHANGES' and 'CANCEL'.

Checking In

- Checking in a client can keep them active on the queue. If a client does not have any activity for 90 days, their CQ referral will expire.
 - A client should be checked in via the check-in button on their referral (and a service or event recorded) *every time* they are in contact with an Access Point staff member

Dashboard Pending **Community Queue** Analysis Completed Denied Sent Availabilit

Community Queue

Permanent Housing/ RRH Queue Family Shelter Community Queue F

Search

Active Agency Sara H. Agency 2

Eligible Clients Only

Client

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

Chief Thunderbolt

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

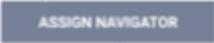
Referred Date 12/13/2018 4:21 PM

Days Pending 683 day(s)

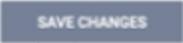
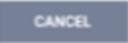
Qualified Reassigned

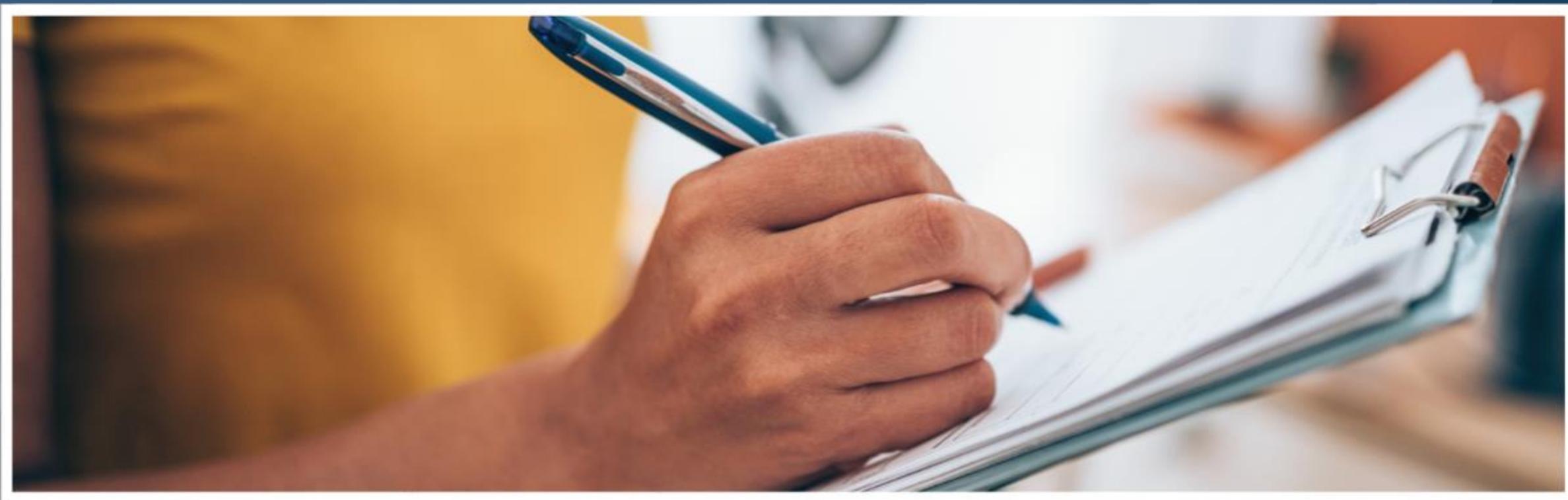
Last Activity 07/31/2020 

Referred by Staff Ja Guerrero Huh ⓘ

Navigator 

Private



Matchmaking: Program Openings

Program Openings

- Openings for family resources can be seen in multiple places.
- The reports can be located on the referrals screen on the *Dashboard Tab* or on the *Open Units Tab*
- Click on the appropriate report link for the opening you are trying to reserve. (You may need to do this in a new tab)

San Francisco Family Coordinated Entry Agency

REFERRALS

Dashboard Pending Community Queue Analysis Completed Denied Sert Availability Unit Queue Open Units

Dashboards

Systemwide Openings Guide

Systemwide Openings Guide

Below is a guide and links to the current source of openings information by population. Reports are also located on the [Data Analysis](#) tab.

NOTE: Clicking directly on the report links may not work in some web browsers. A fail-safe strategy is to right-click on the links and choose "Open link in new tab".

Adult Reports

- **Adult Flex Pool & RRH Housing Program Openings:** Lists Flex Pool scattered site and RRH openings available for Adults
- **Adult Open PSH Units:** Lists site-based PSH units available for referral (or with a pending referral) by the Adult Navigation Teams (ECS, Dolores Street, Pretrial Diversion, and SF HOT)
- **HAT Open PSH Units:** Lists site-based PSH units available for referral (or with a pending referral) by the Housing Access Team (HAT) for CAAP clients
- **Temporary Shelter Open Bed/Unit Report:** Lists unoccupied temporary shelter units/beds available for referral by HSH Guest Placement for adults and youth/TAY without children

Family Reports

- **Family Flex Pool & RRH Housing Program Openings:** Lists Flex Pool scattered site and RRH openings available for referral by the Family CE Access Points
- **Family Open PSH Units:** Lists site-based PSH units available for referral (and with a pending referral) by the Family CE Access Points
- **Family Open Shelter & Transitional Housing Units:** Lists shelter and transitional housing units/beds available for referral (and with a pending referral) by the Family CE Access Points
- **Family Urgent Accommodation Voucher Openings:** Lists Urgent Accommodation Voucher (UAV) openings available for referral by the Family CE Access Points

Program Openings

This screenshot shows the main application dashboard. At the top right, the user is identified as Paul Devencenzi, TRAIN - San Francisco Family Coord... with a profile icon labeled 'PD'. Below the header, there are navigation options: SEARCH, CASELOAD, and REFERRALS. A central menu is displayed with several icons: SETUP (gear), MANAGE (document), REPORTS (document with lines), CALENDAR (calendar), MERGE (document with arrows), DATA IMPORT (database icon), and INVENTORY (house icon). The 'REPORTS' icon is highlighted with a red rectangular box.

This screenshot shows the 'System' data analysis page. The user is identified as Paul Devencenzi, System, with a profile icon labeled 'PD'. The page has a dark header with navigation options: REPORT LIBRARY, EXPLORE, and DATA ANALYSIS. The 'DATA ANALYSIS' option is highlighted with a red rectangular box. Below the header, the page title is 'DATA ANALYSIS'. On the right side, there is a logo for 'CLARITY HUMAN SERVICES'. The main content area shows a list of reports under the heading 'San Francisco ONE System Reports' (72 report(s)). The reports are listed as follows:

- Coordinated Entry for Families
- *Families on Temporary Shelter Queue (RUN)
- *SF Family Housing Prioritization Dashboards (RUN)
- Family Community Queue Referrals (RUN)
- Family Flex Pool & RRH Housing Program Openings (RUN)
- Family Open PSH Units (RUN)
- Family Open Shelter & Transitional Housing Units (RUN)
- Family Priority List with Disabling Conditions (RUN)
- Family Urgent Accommodation Voucher Openings (RUN)
- Housing Referral Status Refusals Tracking (RUN)

The report titles 'Family Flex Pool & RRH Housing Program Openings', 'Family Open PSH Units', 'Family Open Shelter & Transitional Housing Units', and 'Family Urgent Accommodation Voucher Openings' are highlighted with red rectangular boxes.

Program Opening Reports

Family Open PSH Units 41 m ago

Agency Name Building Name Current Availability Referral Channel ADA Accessible Building ADA Unit Pets Allowed Min Occupancy Unit Population - Size - Funding

is any value is any value **is Available** is any value any value any value any value is any value is any value

Family Open PSH Units												
Agency Name	Building Name	Program Name	Unit Name	Link to Unit Page	Unit Population - Size - Funding	Current Availability	Current Availability Start Date	Client Full Name	Referral Status	Referral Channel	Access Point Staff Responsible for Filing Unit	
1	Catholic Charities CYD	Hazel Betsey Community	Hazel Betsey - CoC + HOPWA	004	3852	Family - 1BR - CoC + HOPWA	Available	2025-01-27			Family CE	Jasmine Shakesnider (MAP)
2	Mission Housing Development Corporation	Juan Pifarré Plaza	Juan Pifarré Plaza - CoC + HOPWA	301	7870	Family - 1BR - CoC + HOPWA	Available	2025-03-11			Family CE	Cynthia Thomas
3	Tenderloin Neighborhood Development Corporation	Eddy and Taylor	Eddy and Taylor - HUD PBV	205	8564	Family - 2BR - HUD PBV	Available	2025-05-06			Family CE	Jasmine Shakesnider MAP
4	Tenderloin Neighborhood Development Corporation	Eddy and Taylor	Eddy and Taylor - HUD PBV	502	9270	Family - 2BR - HUD PBV	Available	2025-05-02			Family CE	Clemencia Cardoza (BAP)

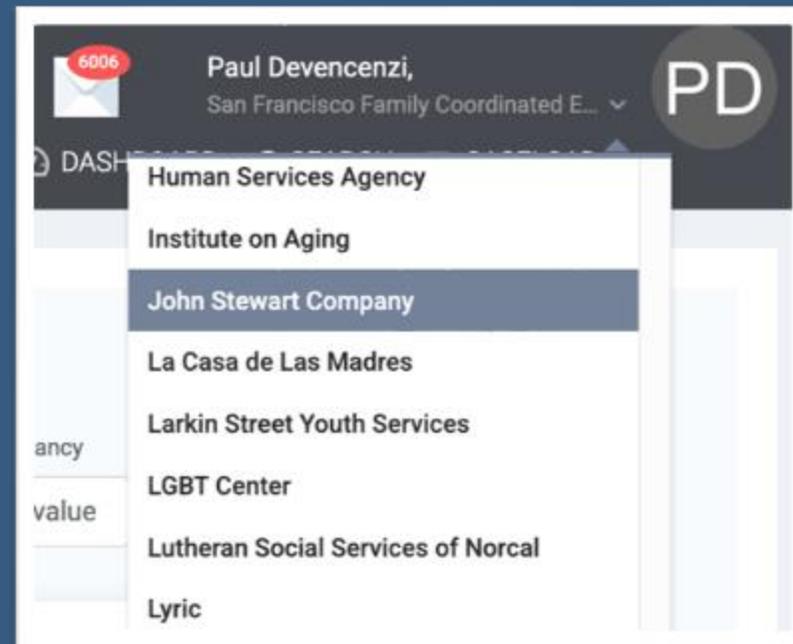
Initial Date Unit Assigned to Access Point Staff to Fill	Most Recent Date Unit Re-Assigned to Access Point Staff to Fill	Additional Notes
2025-01-30		
2024-05-09	2025-02-11	Re-assigned to Alan 4/8/2025 Unre-assigned to Cynthia 2/11/2025 UnCentral City Access Point



Claim Responsibility for an Opening

Switching Agencies

- You will need to switch your active agency to the agency you will be referring to (the agency that manages the resource) to claim responsibility for that unit.
- You will then need to switch back to CE to make the referral.



Claiming Responsibility for a Program Opening

- Once you have switched your agency, return to the report page
- Click on the *Link to Unit Page* code and then select the **Unit Overview** to go to the unit screen

Family Open PSH Units

Agency Name Building Name Current Availability Referral Channel ADA Accessible Building ADA Unit

is any value is any value is Available is any value any value any value

Family Open PSH U

	Agency Name	Building Name	Program Name	Unit Name	Link to Unit Page	Unit Population Funding
1	Catholic Charities CYO	Hazel Betsey Community	Hazel Betsey - CoC + HOPWA	004	3852 ...	Family - 1BP - 0

Links

- Unit Overview

Claiming Units/Beds

- Select “Referral Channel”
- Add your name to “Access Point Staff Responsible for Filling Unit”
- Add "Initial Date Unit Assigned to Access Point Staff to Fill"
 - If the *Current Availability* date is after the *Initial Date unit was Assigned* date, then you will only update this date field
- Use "Additional Notes" fields to document any reassignment details including who was reassigned to fill the unit and why

FAMILY & YOUTH ACCESS POINTS, AUTHORIZED ADULT CE STAFF, AND HSH STAFF COORDINATING TRANSFERS MAY UPDATE ONLY THE FIELDS BELOW:

Referral Channel	Select	▼
Access Point Staff Responsible for Filling Unit		
Initial Date Unit Assigned to Access Point Staff to Fill	__/__/__	📅
Most Recent Date Unit Re-Assigned to Access Point Staff to Fill	__/__/__	📅
Additional Notes		

- ✓ Select
- Family CE
- Youth CE
- Transfer from within Site-Based PSH
- Transfer from Flexible Housing Subsidy Pool
- Transfer from RRH

Reassign Unit/Bed to a Different Access Point/Staff Member

- Update "Access Point Staff Responsible"
- Leave "Initial Date" as is
- Update "Most Recent Date Unit Re-Assigned to Access Point Staff to Fill"

FIELDS BELOW FOR USE BY FAMILY & YOUTH ACCESS POINTS OR HSH STAFF COORDINATING TRANSFERS INTO FAMILY & YOUTH UNITS

Referral Channel 

Access Point Staff Responsible for Filling Unit

Initial Date Unit Assigned to Access Point Staff to Fill 

Most Recent Date Unit Re-Assigned to Access Point Staff to Fill 

Additional Notes



Matchmaking

Matchmaking

- All of the Permanent 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 client's Housing Prioritization assessment 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 use the *Permanent Supportive Housing Community Queue*.
- For Shelter, use the *Temporary Shelter Queue*.
- For Rapid Rehousing use the *Rapid Rehousing Queue*.

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.

The screenshot shows the 'Community Queue' interface. At the top, there are four tabs: 'Permanent Supportive Housing Queue', 'Rapid Rehousing Queue', 'Temporary Shelter Queue' (which is selected), and 'Transfer Queue (HSH Only)'. Below the tabs, there is a toggle for 'Eligible Clients Only' which is turned on. To the right of the toggle are four filter dropdowns: 'Filter Type' (Standard), 'Mode' (Standard), 'Characteristic' (-- Select --), and 'Sort By' (Default). A 'SEARCH' button is located to the right of these filters. Below the filters, there is a table with columns for 'Client', 'Referral Date', and 'Days Pending'. The first row shows a client named 'Pablo Houser' with a referral date of '03/03/2025 12:30 PM' and '66' days pending. The 'Active Agency' and 'Project' filters are highlighted with a red box in the original image.

Client	Referral Date	Days Pending
Pablo Houser Referred by: TRAIN - San Francisco Family Coordinated Entry Agency	03/03/2025 12:30 PM	66

Matchmaking: Temporary Shelter

- Shelter Eligible Families are identified using the ***Families on the Temporary Shelter Queue Report**
 - Families are represented by their HoH
 - Access through the Reports -> Data Analysis -> Coordinated Entry For Families tab

*Families on Temporary Shelter Queue just now

	HoH Name	HoH Unique Identifier	Client Profile Link	# of Adults in the Household	# of Children in the Household	Total # in the Household	Ages of All Children	Someone in Household Pregnant?	Shelter Assessment Date (default secondary sorting order)	Shelter Assessment Score (default primary sort order)	Date Added to the Temporary Shelter Queue	Assigned Navigator	Current Shelter Enrollment	Program
1		624C00E5A	134345	2	1	3	4,___	Yes	2025-05-20	26	2025-05-20			
2		35E5ADEB7	28767	1	0	1	___	No	2024-12-23	25	2024-12-23	Adam Lange	ESG-HCN CM Services	
3		D18CD79A3	134166	1	1	2	0,___	No	2025-05-14	25	2025-05-20			
4		E459S89A1	127775	1	2	3	15,0,___	No	2025-05-15	25	2025-05-15			
5		A85FADF63	17620	1	1	2	11,___	No	2025-02-03	24	2025-02-03			
6		2AA938002	84688	1	2	3	4,2,___	No	2025-02-18	24	2024-11-27			
7		C8292487C	131530	1	2	3	5,3,___	No	2025-02-24	24	2025-05-05			
8		F824812F6	128170	3	3	6	17,14,6,___	No	2025-03-14	24	2024-11-27			
9		280F1CA4D	57509	3	3	6	17,16,4,___	No	2025-05-01	24	2025-05-01			
10		F5E45F62A	125554	1	3	4	13,10,10,___	No	2025-05-01	24	2025-05-01			
11		2160852D8	120483	1	1	2	13,___	No	2025-05-16	24	2024-11-25			
12		89A543221	27695	1	1	2	4,___	No	2025-05-19	24	2025-05-19			
13		FA23AD17D	94967	2	0	2	___	Yes	2025-05-21	24	2025-05-21			
14		A7B745140	134196	1	1	2	15,___	No	2025-05-21	24	2025-05-15		Buena Vista Horace Mann Family Shelter (Stay Ov...	
15		1EF2C2235	15138	1	2	3	0,0,___	No	2025-01-23	23	2025-01-23			

Matchmaking: Temporary Shelter

- Once you have identified the Family that will be referred, you can search for the HoH on the Temporary Shelter Queue on the *Referrals* screen
- Enter the client's UI and select the agency the shelter is under and hit Search, then click on the edit button next to the client to go into the referral

Community Queue

< Permanent Supportive Housing Queue Rapid Rehousing Queue **Temporary Shelter Queue** Transfer Queue (HSH Only) >

Eligible Clients Only Mode: Standard Characteristic: -- Select -- Sort By: Default

Date: 05/22/2025 9:30 AM Search: E1E4D6D4F Active Agency: TRAIN - Catholic Charities CYO **SEARCH**

Client	Referral Date	Days Pending
 Pablo Program Referred by: System	05/21/2025 9:30 AM	1

Matchmaking: Permanent Supportive Housing

- The process is the same for referring clients to PSH units, you will just need to select the Permanent Supportive Housing Queue

Permanent Supportive Housing Queue | Rapid Rehousing Queue | Temporary Shelter Queue | Transfer Queue (HSH Only)

Eligible Clients Only

Date: 05/09/2025 11:15 AM

Search: pablo

Active Agency: TRAIN - Tenderloin Neighborhood Development C

Project: 1036 Mission - LOSP

Filter Type: Standard

Mode: Standard

Characteristic: -- Select --

Sort By: Default

SEARCH

Client	Referral Date	Days Pending
Pablo Arthur Referred by: TRAIN - San Francisco Adult Coordinated Entry Agency	01/15/2025 2:45 PM	114
Pablo Program Referred by: TRAIN - San Francisco Family Coordinated Entry Agency	05/08/2025 3:45 PM	0

- Optional: You can turn on eligibility and select a specific program, otherwise you eligibility will be calculated on the next screen
- Only PSH is set up with eligibility, so you can use this function to see if a client is eligible

Matchmaking: Making the Referral

- To make a referral, go to the Re-Assign section of the referral screen and select a program and unit to refer to:

Community Queue

Permanent Supportive Housing Queue | Rapid Rehousing Queue | Temporary Shelter Queue | Transfer Queue (HSH Only)

Eligible Clients Only

Date: 05/09/2025 11:15 AM

Search: pablo

Active Agency: TRAIN - Tenderloin Neighborhood Development Co

Mode: Standard

Characteristic: -- Select --

Sort By: Default

Client	Referral Date	Days Pending
Pablo Arthur Referred by: TRAIN - San Francisco Adult Coordinated Entry Agency	01/15/2025 2:45 PM	113
<input checked="" type="checkbox"/> Pablo Program Referred by: TRAIN - San Francisco Family Coordinated Entry Agency	05/08/2025 3:45 PM	0

REASSIGN

Reassignment Date: 05/09/2025 2:15 PM

Program: 681 Florida - LOSP

Eligibility Override:

Opening: 211

SAVE CHANGES CANCEL

If you did not check for eligibility on previous screen, selecting a unit will start a check. You will see the following message if no units are eligible:

⚠ No eligible units are available in selected program.

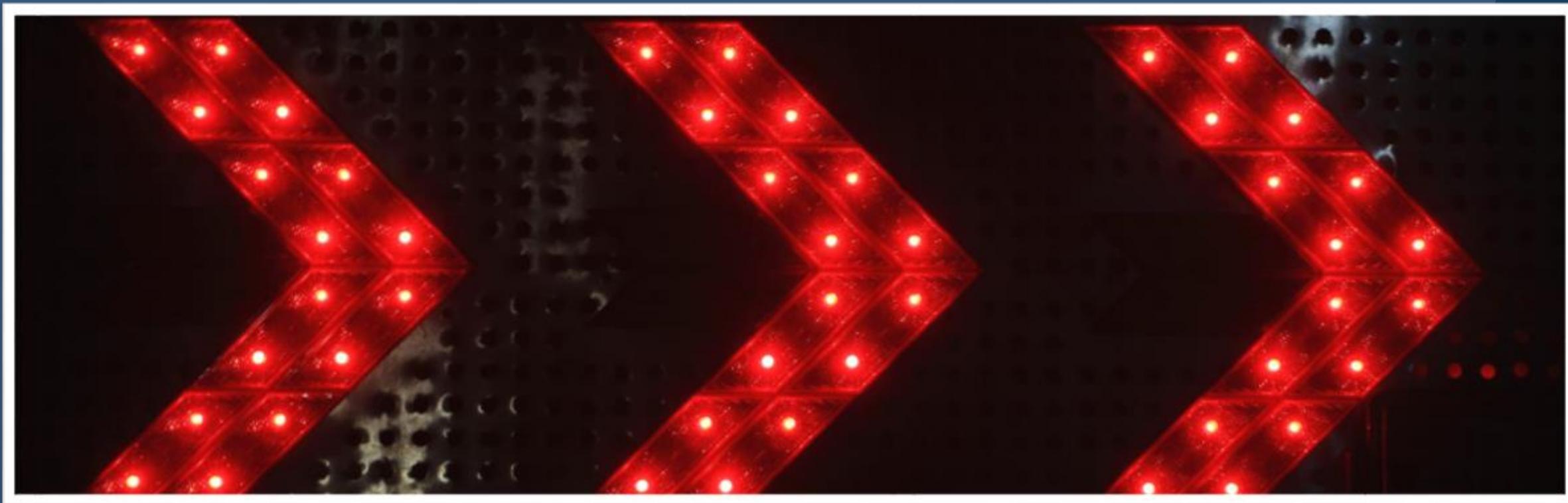
Matchmaking: Assigning a Navigator

- When making the referral, staff must 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



Housing Refusal Assessment

Housing Refusal Assessment

- If a client refuses a housing referral, you must document the refusal using the **Client Housing Refusal Assessment**

PROGRAM: BAYVIEW ACCESS POINT

This is a Program Level Assessment

Enrollment History Provide Services Events **Assessments** Notes Files Forms X Exit

Assessments LINK FROM ASSESSMENTS

Current Living Situation	START
Client Housing Refusal	START

Housing Refusal Assessment

- Complete the Housing Refusal Assessment by filling out the following fields
 - Housing Program
 - Reason for Refusal

CLIENT HOUSING REFUSAL

Date 05/13/2025

TYPE PARTIAL NAME TO LOCATE CORRECT PROGRAM IN THE DROPDOWN LIST

Housing Program Select

Reason for Refusal Select

Private

SAVE CANCEL

- ▶ PH – Housing Only
- ▼ PH – Housing with Services (no disability required for entry)
 - ▼ Abode Services
 - Abode Services - Flexible Housing Subsidy Pool - Prop C
 - Abode Services - Shallow Subsidy Program - Adults - Prop C
 - Bayview Flexible Housing Subsidy Pool- Prop C
 - City Gardens - HUD PBV
 - City Gardens - Prop C

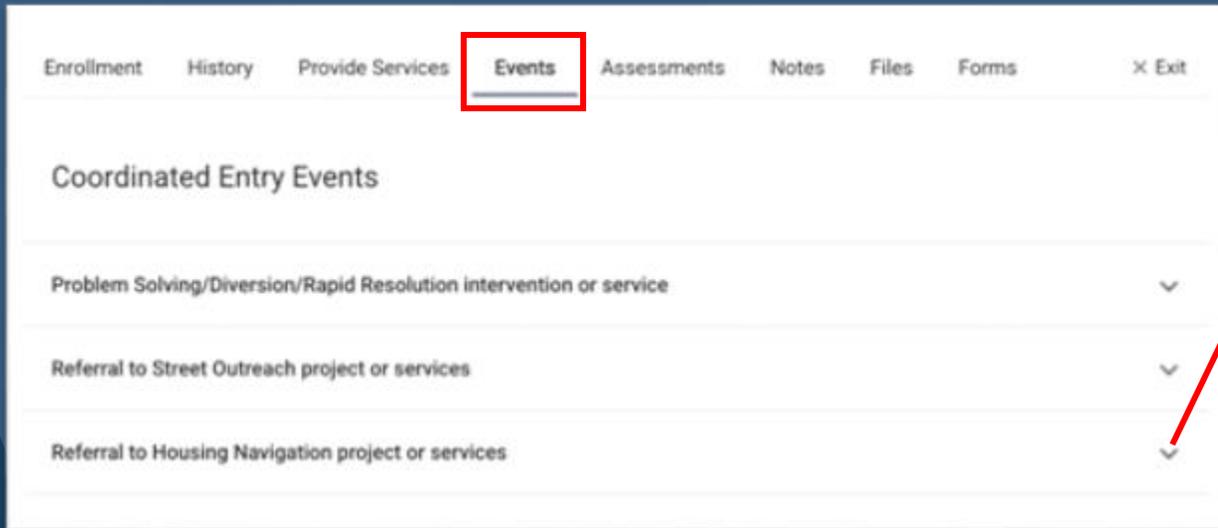
- Decline SRO
- Health needs not met by the site
- Justice Involved: Re-Entry Delay
- No private bathroom
- No private kitchen
- Prefer a different building
- Prefer a different neighborhood
- Prefer a larger unit



Services & Events

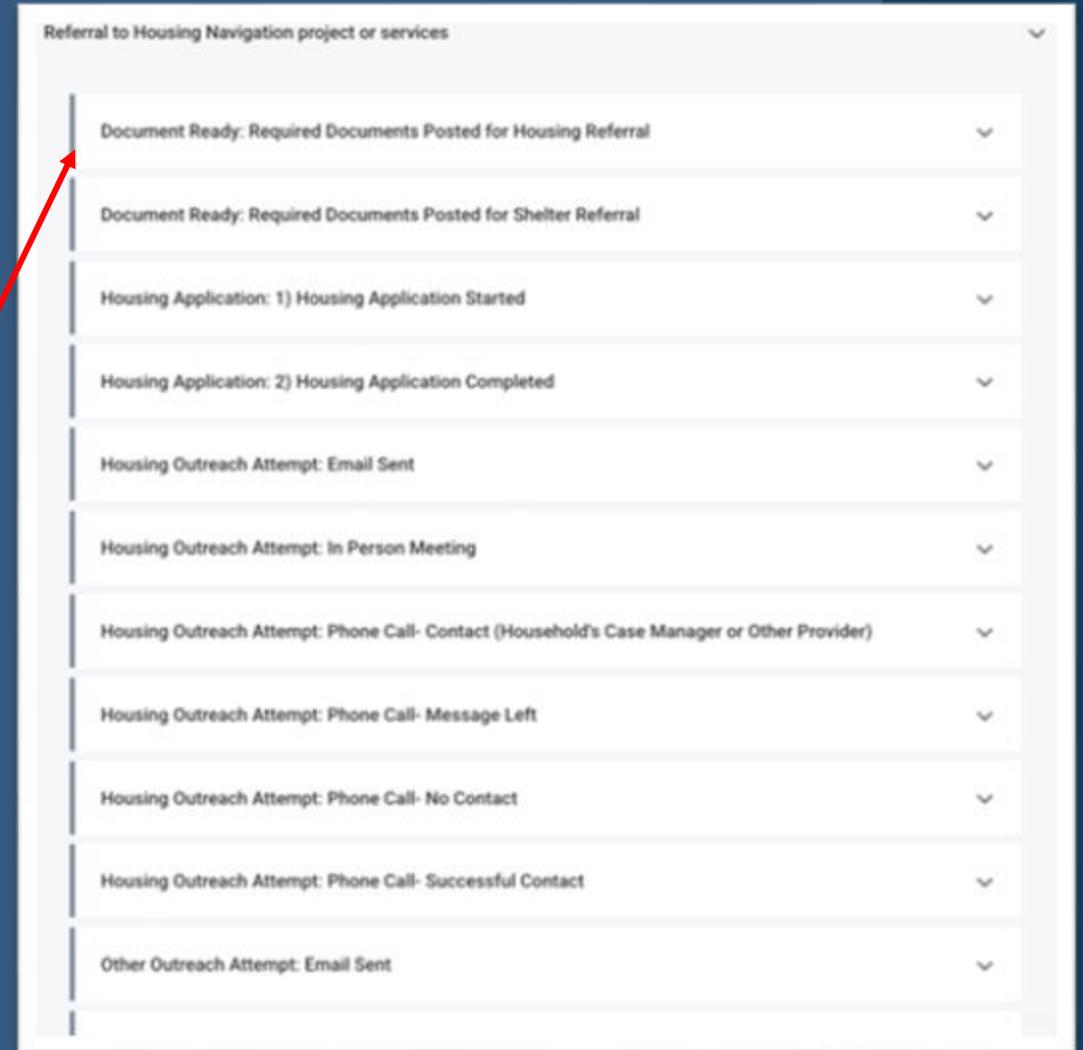
Events

Depending on what kind of interaction you have with a client, a CE Event may need to be logged



The screenshot shows a navigation menu with the following items: Enrollment, History, Provide Services, **Events** (highlighted with a red box), Assessments, Notes, Files, Forms, and X Exit. Below the menu, there is a section titled "Coordinated Entry Events" with a list of event categories, each with a dropdown arrow:

- Problem Solving/Diversion/Rapid Resolution intervention or service
- Referral to Street Outreach project or services
- Referral to Housing Navigation project or services



The screenshot shows the expanded dropdown menu for "Referral to Housing Navigation project or services". It contains a list of event types, each with a dropdown arrow:

- Document Ready: Required Documents Posted for Housing Referral
- Document Ready: Required Documents Posted for Shelter Referral
- Housing Application: 1) Housing Application Started
- Housing Application: 2) Housing Application Completed
- Housing Outreach Attempt: Email Sent
- Housing Outreach Attempt: In Person Meeting
- Housing Outreach Attempt: Phone Call- Contact (Household's Case Manager or Other Provider)
- Housing Outreach Attempt: Phone Call- Message Left
- Housing Outreach Attempt: Phone Call- No Contact
- Housing Outreach Attempt: Phone Call- Successful Contact
- Other Outreach Attempt: Email Sent

Services

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

Enrollment	History	Provide Services	Events	Assessments	Notes	Files	Forms	× Exit
Services								
Accepted Reservation at Congregate Shelter			Other ▾					
Background Check Complete			Housing Search and Placement ▾					
Congregate Shelter Placement Outreach			Other ▾					
Declined Offer of Congregate Shelter: Hamilton Families			Other ▾					
Individual Room Shelter Placement Outreach			Housing Search and Placement ▾					
Problem Solving Financial Assistance			Financial ▾					
Refused Individual Room Shelter Referral			Housing Search and Placement ▾					
Requested Assistance from APs?			Case Management ▾					
Unique Circumstances			Other ▾					

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

Refused Individual Room Shelter Referral	Housing Search and Placement ▾
Family declined offered shelter room	▾
Family is MIA	▾
Family is no longer interested in shelter placement	▾
Family moved out of region	▾
Family was referred to a different individual room shelter	▾
Family was referred to PSH opportunity	▾
Other	▾

Services

- Dates should be entered for every service.
- A case notes should be entered under *Service Note*.
- You can toggle on all household members that are relevant to the service

Family is no longer interested in shelter placement ^

Start Date: 05/14/2025  End Date: 05/14/2025 

Include group members:

Momo Houser

Annie Prescott

Service Note :

B *I*  

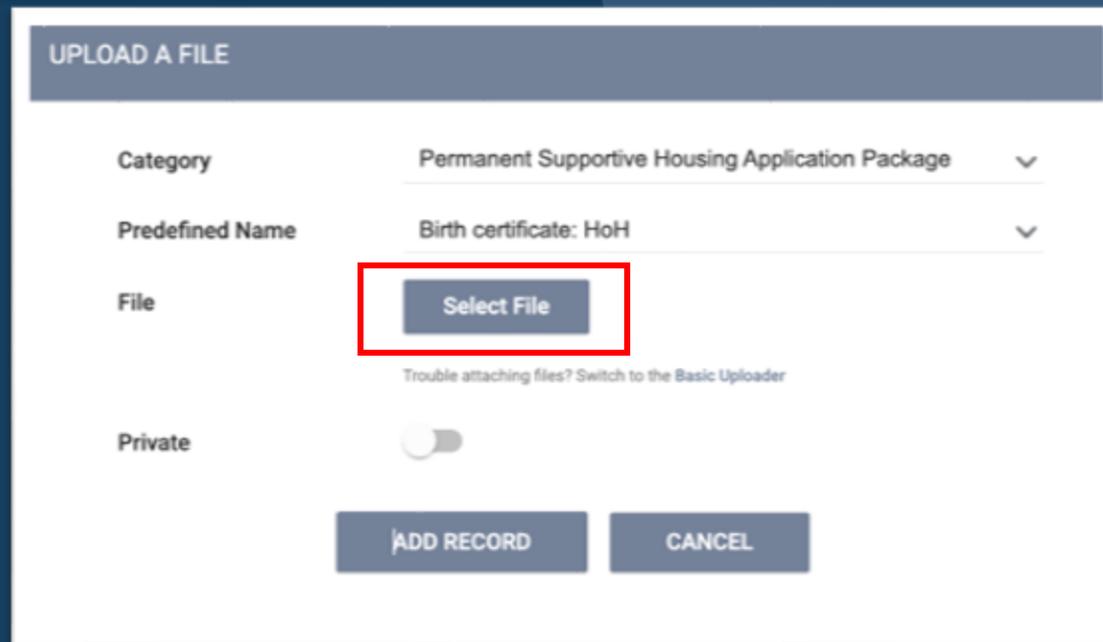
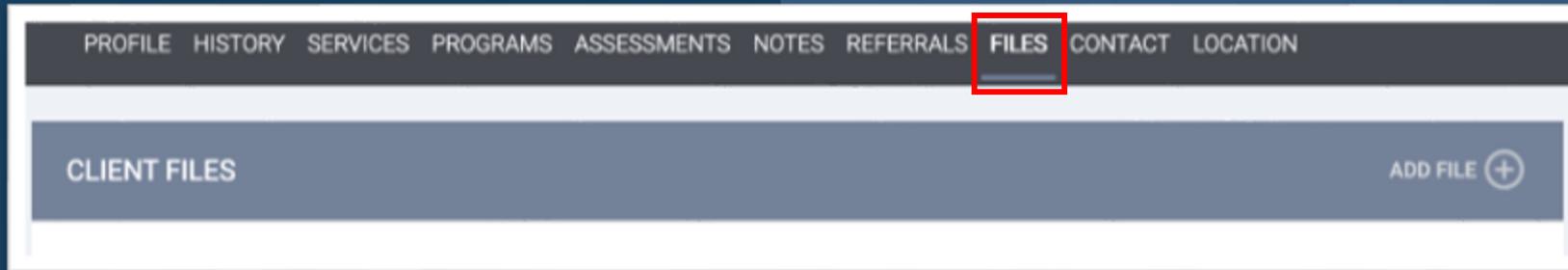
SUBMIT



Uploading Documents

Uploading Documents

All client documents should be uploaded into the client's record



A screenshot of the 'UPLOAD A FILE' form. The form has a title bar 'UPLOAD A FILE'. It contains the following fields and controls:

- Category:** A dropdown menu with the selected value 'Permanent Supportive Housing Application Package'.
- Predefined Name:** A dropdown menu with the selected value 'Birth certificate: HoH'.
- File:** A button labeled 'Select File' is highlighted with a red box.
- Private:** A toggle switch that is currently turned off.
- Buttons:** At the bottom, there are two buttons: 'ADD RECORD' and 'CANCEL'.

Below the 'File' field, there is a link: 'Trouble attaching files? Switch to the Basic Uploader'.

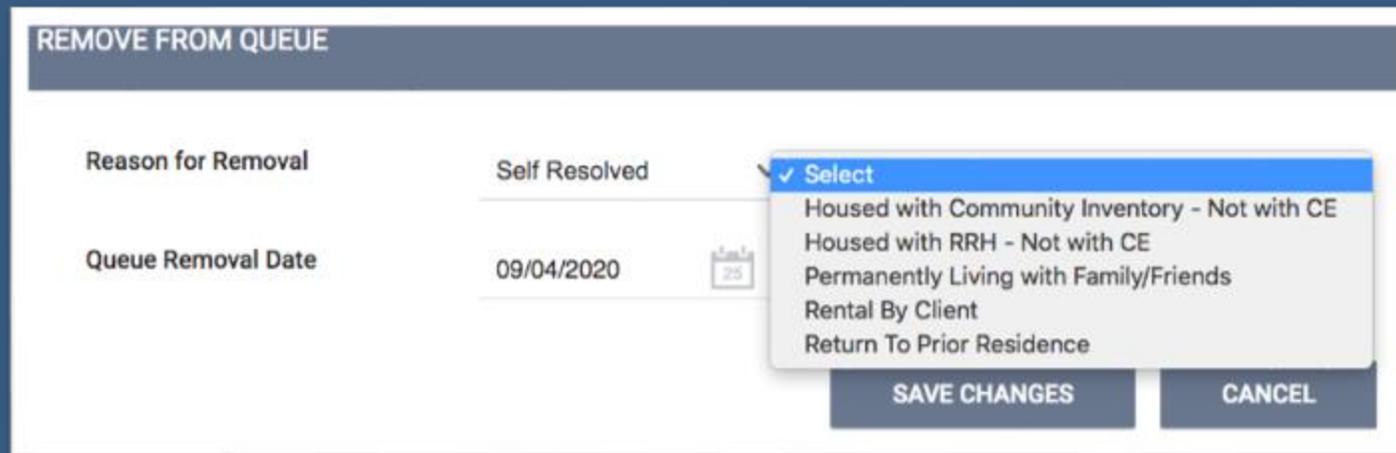
- Select a **File Category** and **Predefined Name** to label the file
- Upload a file using the **Select File** button
- Click Add Record



Exits

Exits

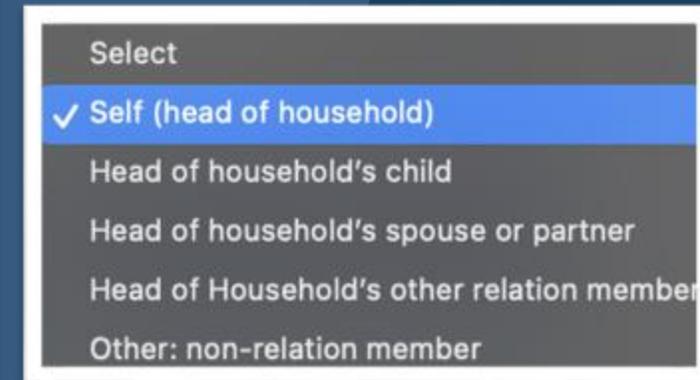
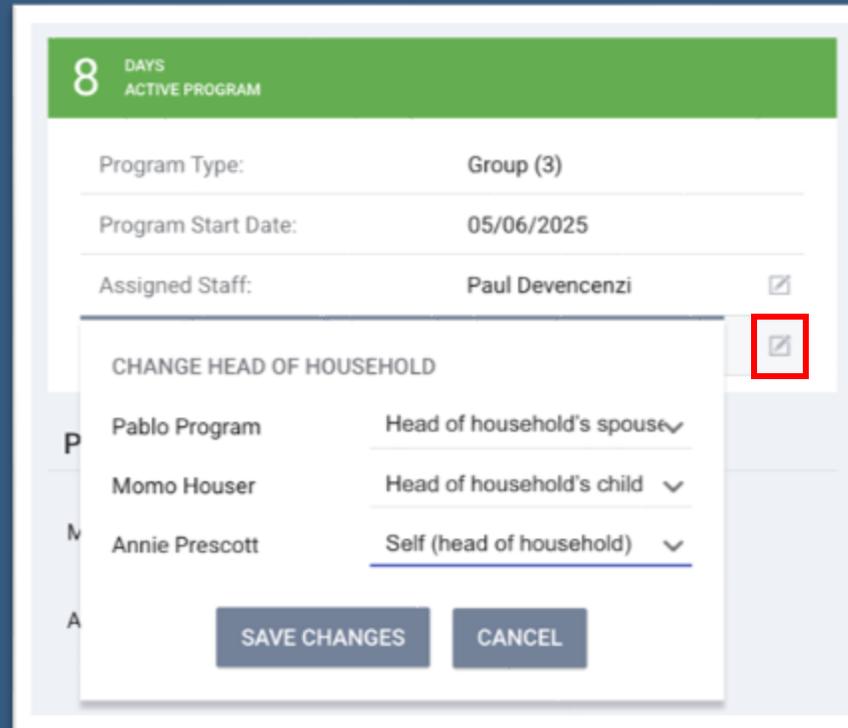
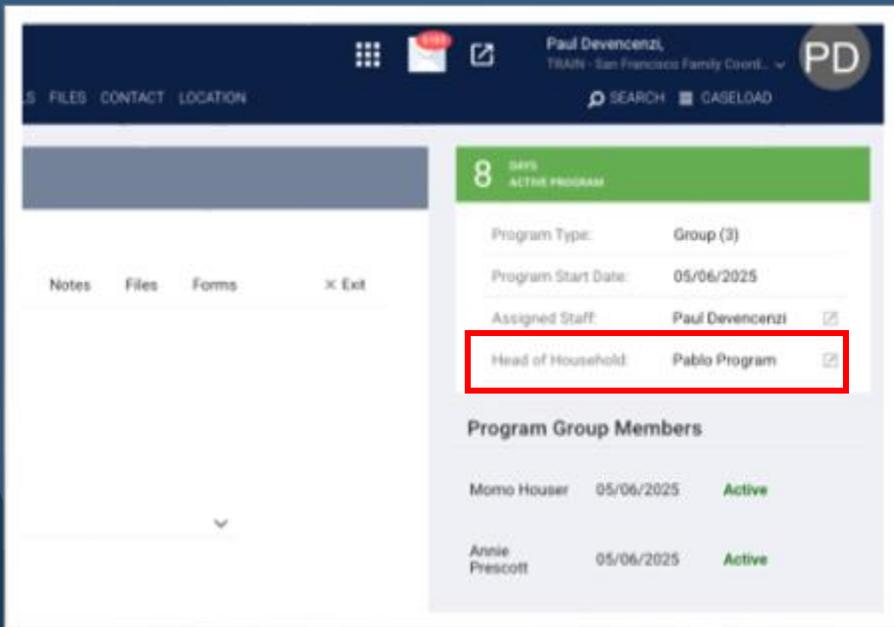
- Client should be manually exited from the FCE Access Point program for the following reasons:
 - Client has left San Francisco
 - The client has been successfully problem solved
 - The client is known to be housed
 - Client is deceased
- If a client is being exited from CE, but they still have a Pending Referral on the Community Queue, remove the client from the queue at the time of exit.



The screenshot shows a web form titled "REMOVE FROM QUEUE". It has two main input fields: "Reason for Removal" and "Queue Removal Date". The "Reason for Removal" field currently contains the text "Self Resolved". A dropdown menu is open next to this field, showing a list of options: "Select" (with a checkmark), "Housed with Community Inventory - Not with CE", "Housed with RRH - Not with CE", "Permanently Living with Family/Friends", "Rental By Client", and "Return To Prior Residence". The "Queue Removal Date" field contains the date "09/04/2020" and has a calendar icon to its right. At the bottom of the form, there are two buttons: "SAVE CHANGES" and "CANCEL".

Exits – Managing Households

- If exiting a Head of Household, but not the entire household, a new Head of Household must be assigned



Exits

PROGRAM HISTORY

Program Name Start Date End Date Type

Street Outreach (Non-PATH)

Street Outreach

TRAIN - HSH - SFHOT ⓘ

 Bayview Access Point

Coordinated Entry

TRAIN - San Francisco Family Coord

PROGRAM: BAYVIEW ACCESS POINT

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

Program Service History

SELECT CLIENTS TO EXIT FROM PROGRAM

- Pablo Program Husband
- Momo Houser Daughter
- Annie Prescott Wife

END PROGRAM

Exits

End Program for client Pablo Program

Program Exit Date 05/13/2025 

Destination **Select** 

Exit Reason **Select** 

Family CE Program Exit Destination Note:

DISABLING CONDITIONS AND BARRIERS

Physical Disability No 

Developmental Disability No 

Chronic Health Condition No 

HIV - AIDS No 

Mental Health Disorder No 

Substance Use Disorder No 

MONTHLY INCOME AND SOURCES

Income from Any Source No 

- ✓ Select
- Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)
- Emergency shelter, including hotel or motel paid for with emergency shelter voucher, Host Home shelter
- Safe Haven
- Foster care home or foster care group home
- Hospital or other residential non-psychiatric medical facility
- Jail, prison, or juvenile detention facility
- Long-term care facility or nursing home
- Psychiatric hospital or other psychiatric facility
- Substance abuse treatment facility or detox center
- Transitional housing for homeless persons (including homeless youth)
- Residential project or halfway house with no homeless criteria
- Hotel or motel paid for without emergency shelter voucher
- Host Home (non-crisis)
- Staying or living with family, temporary tenure (e.g., room, apartment, or house)

- ✓ Select
- Client is no longer in SF County
- Client placed in Institutional Setting
- Denial of Service
- Deceased
- Exit by Client Choice
- Housed through Coordinated Entry
- Housed through Referral to Other Problem Solving Resource
- Housed through Problem Solving Resolution
- Journey Home Relocation
- Terminated from Program due to Ineligibility
- Data not Collected

If a HoH is exited without a new HoH assigned, ONE will give you a warning message and remind you to pick a new HoH

Auto-Exits

- **Auto-exits** from the CE program may occur if:
 - The household is permanently housed through CE.
 - Any household enrolled in the CE program has no activity in ONE for 90 days.
Exit Destination will be marked as “Unknown”.

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.

Auto-Exit Thresholds

CE Program Auto-Exit Threshold

ONE System Coordinated Entry & Community Queue Auto-Exit Settings			
Category	Program/Queue	Auto-exit Threshold	Activities that prevent auto-exits in ONE
CE Program Enrollment	All CE Programs	90 days	<ul style="list-style-type: none"> • Adding/editing a program level Service or Event • Adding/editing a program level CE Assessment • Adding/editing a: <ul style="list-style-type: none"> ○ Status Assessment ○ Annual Assessment ○ 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

Housing Referral Auto-Exit Threshold

Community Queue	-CAAP PSH Queue -Permanent Supportive Housing Queue -Rapid Rehousing Queue -Temporary Shelter Queue	90 days	<ul style="list-style-type: none"> • Adding/editing a Service or Event (client level and program level) • Adding/editing a CE Assessment (client level and program level) • Adding/editing a: <ul style="list-style-type: none"> ○ Status Assessment ○ 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 <p><i>Additionally, the threshold "clock" is reset when a referral returns to the queue as a result of a denial/expiration or is placed on the queue as the result of a transfer from another queue.</i></p> <p><i>Note that program-level actions listed in this section will prevent auto-exits from a Community Queue regardless of the program in which they are administered.</i></p>
	-Transfer Queue (HSH Only)	180 days	
	-SFHA - EHV	720 days	

Additional Reports and Dashboards

This screenshot shows the main dashboard menu. The user is Paul Devencenzi, a Family Coordinator in the TRAIN system at San Francisco Family Coord... The menu includes options for SETUP, MANAGE, REPORTS (highlighted with a red box), and CALENDAR. Below these are options for MERGE, DATA IMPORT, and INVENTORY. The dashboard also displays 'Your recent client searches:' with entries for Pablo Program, Pablo Arthur, and Annie Prescott.

This screenshot shows the 'System' dashboard. The user is Paul Devencenzi, a System user. The dashboard has tabs for REPORT LIBRARY, EXPLORE, and DATA ANALYSIS (highlighted with a red box). The main content area is titled 'DATA ANALYSIS' and shows a list of reports. The 'San Francisco ONE System Reports' section is expanded to show 72 reports. A red box highlights a list of reports under the heading 'Coordinated Entry for Families'.

Coordinated Entry for Families	
*Families on Temporary Shelter Queue	RUN
*SF Family Housing Prioritization Dashboards	RUN
Family Community Queue Referrals	RUN
Family Flex Pool & RRH Housing Program Openings	RUN
Family Open PSH Units	RUN
Family Open Shelter & Transitional Housing Units	RUN
Family Priority List with Disabling Conditions	RUN
Family Urgent Accommodation Voucher Openings	RUN
Housing Referral Status Refusals Tracking	RUN

Resources

Bitfocus Help Desk

For 1-on-1 help, contact the Bitfocus Help Desk with any issues or questions regarding the ONE System

- onesf@bitfocus.com
- 415.429.4211

ONESF Help Center Website

For referencing training slides, recordings, toolkits or any other workflow related documents

- onesf.bitfocus.com

Help Desk Widget (In ONE System and on ONESF Help Center Website)

