Family Temporary Shelter Inventory Management
ONE System Workflow Toolkit

November 2024

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Context

Inventory in the ONE System allows for precise tracking of Family Shelter and Transitional Housing units (or beds for congregate shelter), including which family is being referred to or occupying each unit/bed. The Urgent Accommodation Voucher (UAV) programs are not using Inventory at this time. Instead, they will continue to post program openings. Similarly, the Buena Vista Horace Mann shelter will also keep its current process and not use the Inventory functionality.

What Inventory Does

Inventory in ONE is:

- A set of tools built into the ONE System
- A way to track and view available units/beds with precision and transparency
- Information that will help better match families to the units/beds that fit their needs

Using Inventory in ONE helps with the following:

- Streamlines workflows and better serves families
- Provides more transparency into the overall Family Temporary Shelter portfolio
- Supports reconciliation and communication by being a reliable source of truth
- Provides better and more timely information to HSH and the community about which units/beds are unoccupied, for how long, and why

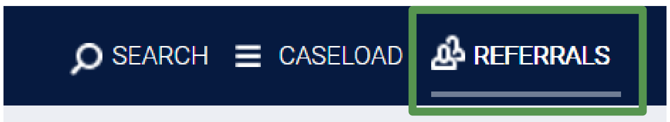
Monitor Incoming Referrals

The Referrals tab displays incoming referrals. If you would like to receive an alert via email every time a referral is sent to your program, email onesf@bitfocus.com to request this setup.

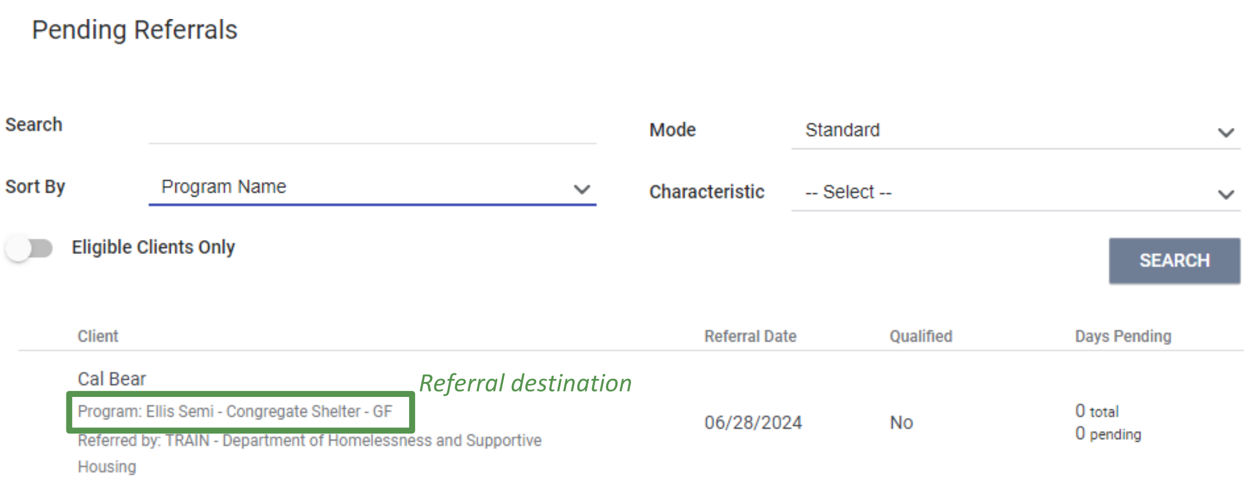
Use the **Referrals** tab to monitor incoming referrals to your shelter or transitional housing program. The head of household's profile can be accessed directly from the Referral tab and enrolled to a program.

Step by Step

1. Locate the **Referrals** tab in the top menu bar of the ONE System. If you don't see the Referrals tab, click the **Search** tab (please note that the Referral tab does not display if you have clicked to view a particular client's profile).



2. Under **Pending Referrals**, all active referrals to your Agency will be displayed. The destination for each client is displayed underneath their name. Please note that only the Head of Household will appear in the Pending Referrals tab.



Since all referrals to your Agency are shown, you may see referrals to multiple programs. You can use the *Sort By* filter to group referrals by program or use the *Search* bar to search for a client name.

NOTE: For congregate shelter (Hamilton Family Emergency Center), each bunkbed is set up as an Inventory "unit". If a family needs to occupy more than one bunkbed, the Family Access Points have been instructed to refer the head of household to one bunkbed, and list additional bunkbeds being held for the family in the referral notes. To view the referral notes, click on the pencil icon to the left of the referral to view the referral and scroll down to the "Notes" section. Then you can hit the back button on your browser to return to the Pending Referrals page and continue to step 3.

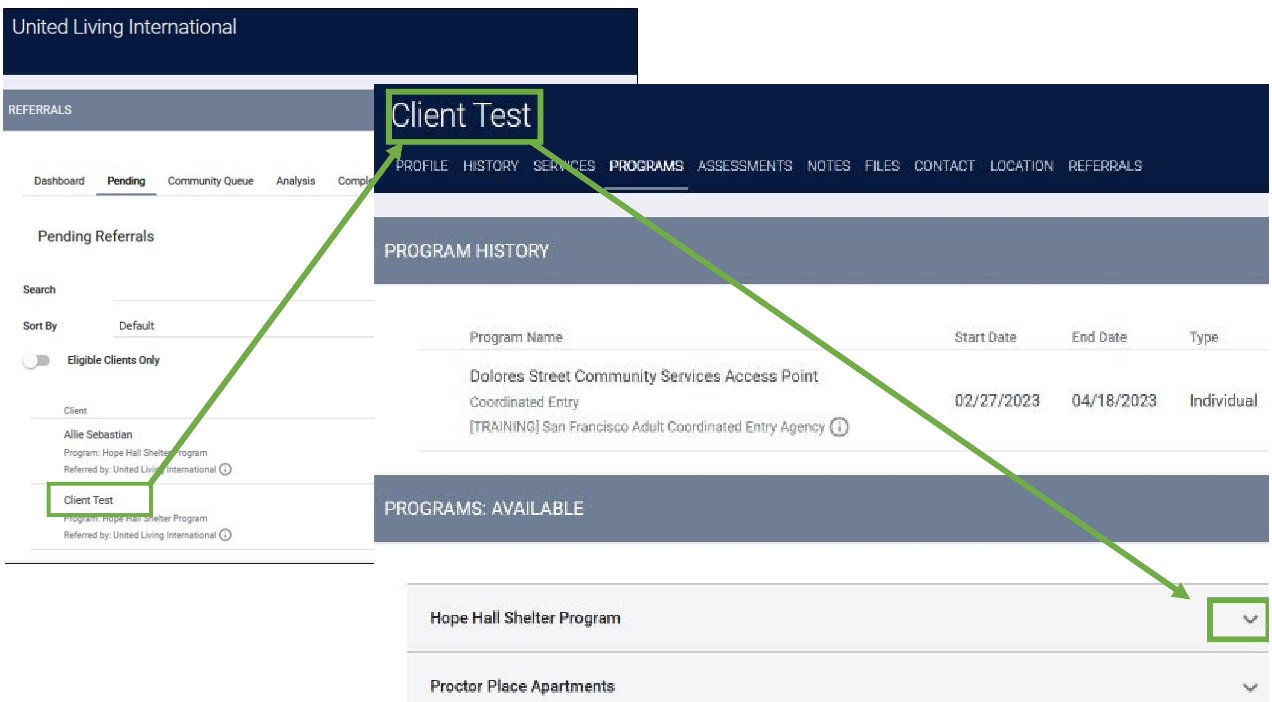
3. Click the client's name to access their profile. You can proceed to the next section of this guide.

Accept Referral and Enroll Family in Program

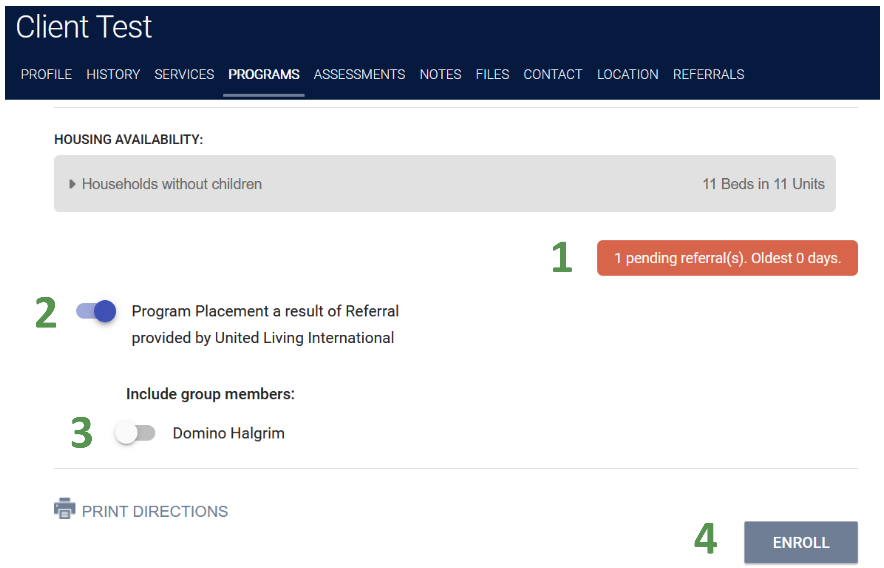
Enroll the family in the program as soon as possible when they arrive. If they do not arrive, deny the referral as soon as you know they are not coming, or by the end of your intake window. Navigate to the head of household's profile and the **Programs** tab in their record. Select the correct program under **Programs: Available**. Ensure that the "Program Placement a Result of Referral" toggle is ON. Enroll the head of household and other household members.

<u>Step by Step</u>

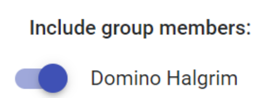
1. Open the head of household's profile and click into programs. Under **Programs: Available**, click on the appropriate program to expand. You can access the referral record here by clicking on the pencil icon next to the referral record in the list. You can also access the head of household's record by clicking on the client's name from the **Pending** tab in **Referrals**.



2. There should be an orange box [1] identifying that there is a pending referral to this program. Ensure the toggle that says 'Program Placement is a result of Referral' [2] is ON.



Ensure the toggle for **Include group members** is turned **ON** [3] for all members of the household who are part of this stay.



3. Select the **Enroll** button [4]. Doing so will accept the referral and link it to the enrollment record.
4. Complete the enrollment for the head of household, answering all questions. You will then be prompted to enroll the other members of the household.

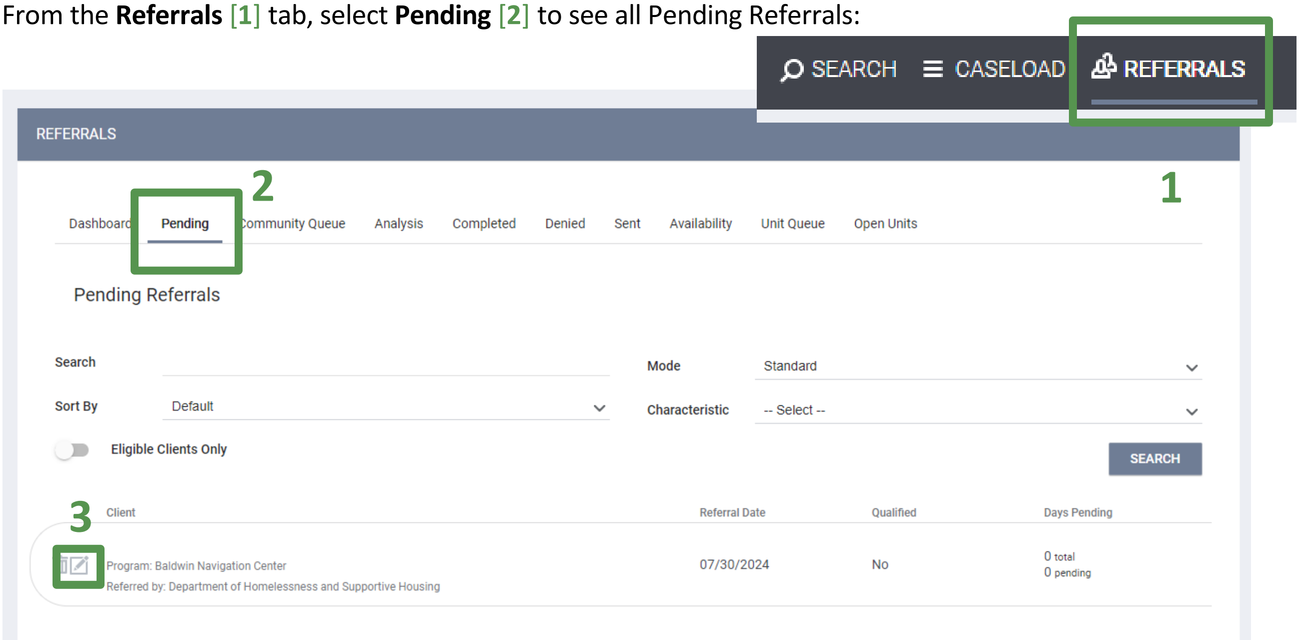
NOTE: For congregate shelter (Hamilton Family Emergency Center), you may need to assign one or more additional bunkbeds (based on the referral note from the Family Access Point) to additional family members as you complete their program enrollment.

Deny a Referral

If a household refuses placement, does not show up, or was referred to a unit/bed that can't accommodate them, you will need to **deny** the referral. Follow the instructions below carefully to ensure the referral is properly processed. This step is very important—if a referral is not denied, the bed will continue to appear as Pending Occupancy and you will be unable to accept another family to the unit/bed.

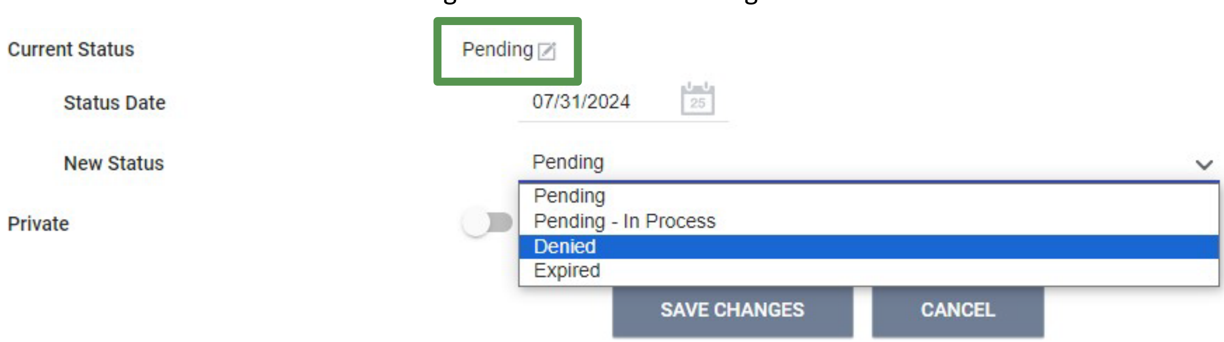
<u>Step by Step</u>

From the **Referrals** [1] tab, select **Pending** [2] to see all Pending Referrals:



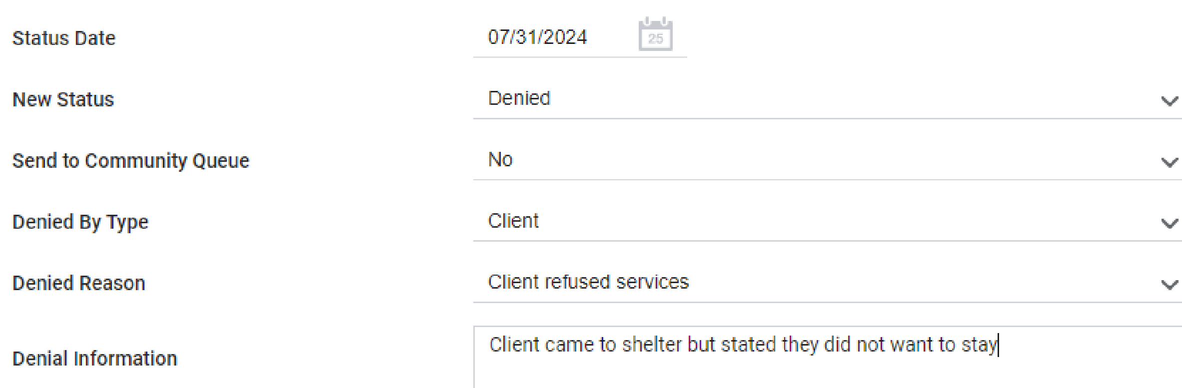
Search for the client and select the edit button [3] next to the referral that needs to be denied.

Scroll down to **Current Status** and change the status from Pending to Denied.



Once you have selected Denied from the **New Status** menu, additional fields will appear. Select the appropriate denial type and reason. Below is an example of what to choose if the family refuses placement and says they are no longer interested in shelter. In cases where the family was referred to the wrong program, was found ineligible for the program, or had a reasonable accommodation the shelter could not fulfill, please select “Yes” for the “Send to Community Queue” dropdown.

Status	Denied
Send to Community Queue	No
Denied By Type	Client
Denied Reason	Client refused services OR Client did not show up or call
Denial Information	Please enter note with additional details



Then click **Save Changes** to complete the denial.

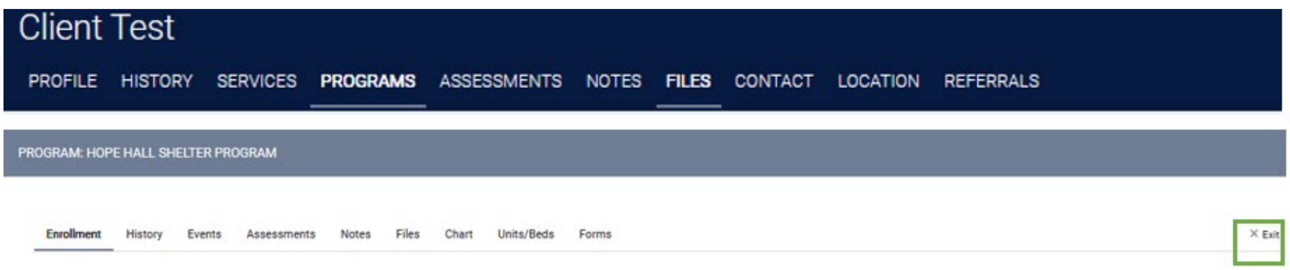
Exit Family from a Program

Exiting a family from a program also exits them from their assigned unit/bed.

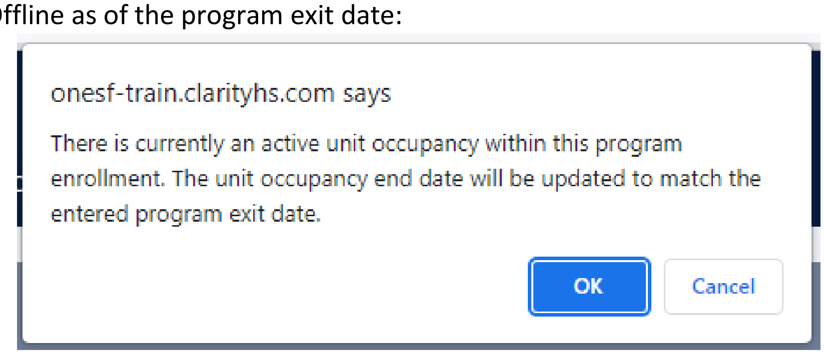
Exiting a family from the program will also exit them from their assigned unit/bed. Exit the family from the program by selecting the appropriate head of household, navigating to the program, and choosing ‘Exit’.

<u>Step by Step</u>

1. Open the client record by searching for the head of household, navigating to **Programs**, select the appropriate program and click the pencil icon to edit. You can also open the program record directly by selecting the client from your **Caseload** list.
2. Select the **Exit** button on the far right, and complete all exit screens.



3. By exiting the family from the program, they will also be automatically exited from the bed or unit. Once the client assigned to that unit/bed (usually the head of household) is exited, the bed will be automatically updated to Offline. Select OK to confirm that the unit occupancy will be ended and will be marked Offline as of the program exit date:



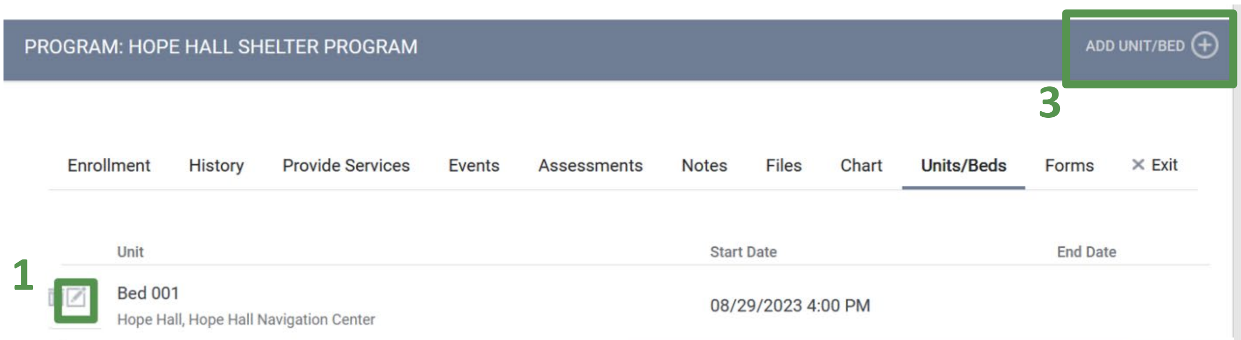
NOTE: If the entire family is not exiting, then exiting a household member without a unit assignment won’t impact the unit/bed assignment of other household members (e.g., the head of household).

Transferring a Family to a New Unit/Bed

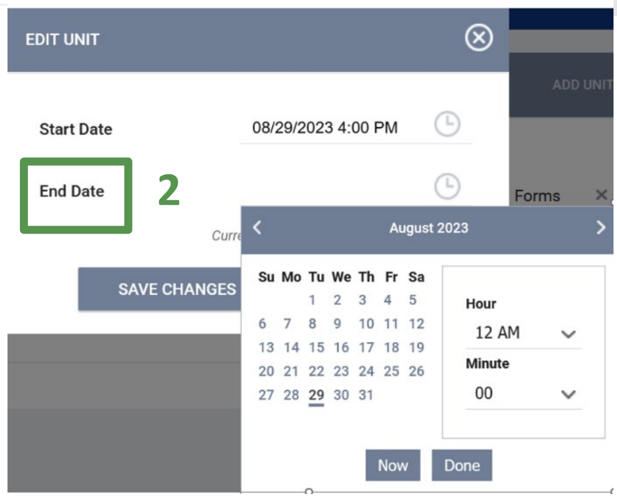
When a family needs to switch units/beds, begin by searching for the head of household. Open their profile, select Programs from the menu and select the appropriate program. Navigate to the Units/Beds tab under the Program tab. After adding an end date to their current occupancy, add their new Unit/Bed.

Step by Step

1. Open the head of household profile and navigate to their current enrollment at your site. Under the Units/Beds tab, you will see their current bed assignment. Changes can be made by clicking the pencil tool next to the bed number [1].



2. An end date and time must be entered [2]. Be sure to hit the *Save Changes* button.
3. Stay on the Units/Beds tab and select the **Add Unit/Bed** tool [3] to assign a new bed.
4. In the pop-up window, fill in the start date. Under **Available Units**, select the new bed, and confirm the assignment.

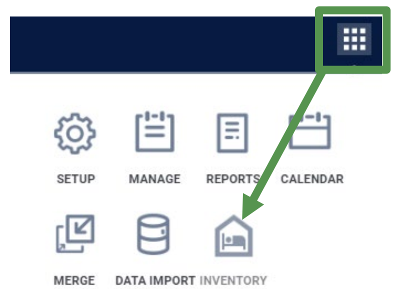


Change the Offline Status of a Unit/Bed

If a unit/bed needs repairs, cleaning, or is otherwise temporarily unavailable, the bed status can be set Offline. Any time a bed is unavailable for a client to occupy right away, it should be set to Offline. Changing bed status is done on the Inventory Dashboard. Once the bed is ready for occupancy, you can end the Offline period to make it Available for a new referral.

<u>Step by Step</u>

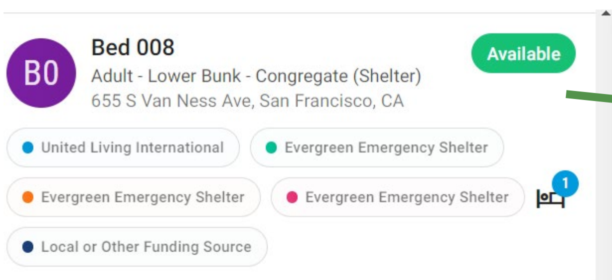
Make a Unit or Bed Offline

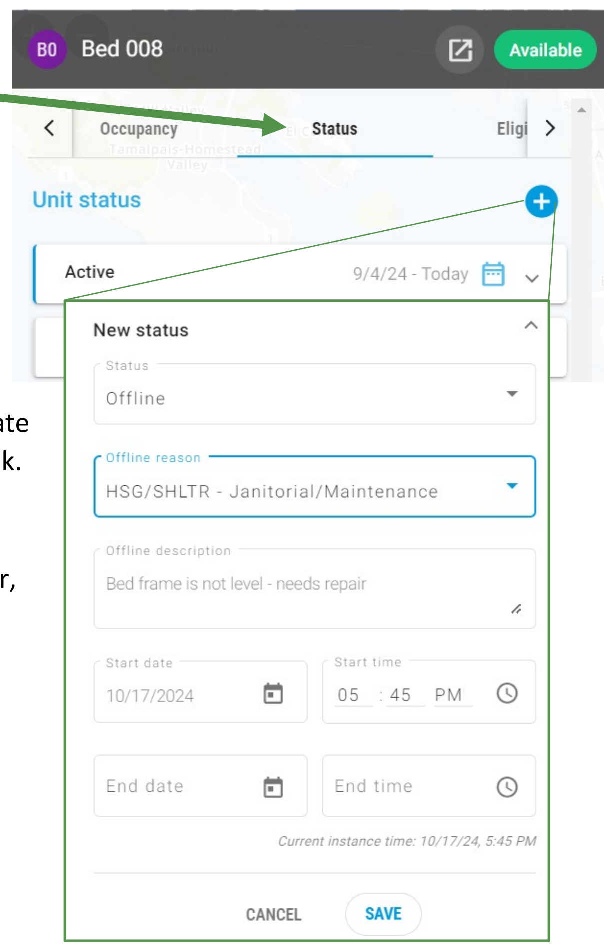


1. Go to the **Inventory Dashboard**, which can be found under the waffle tool.

2. Select the Building by using Building filter at the top of the page.

3. Select the appropriate unit to see the unit's pop-up display card. Click the **Status** button, then find the **(+)** to add an offline status.

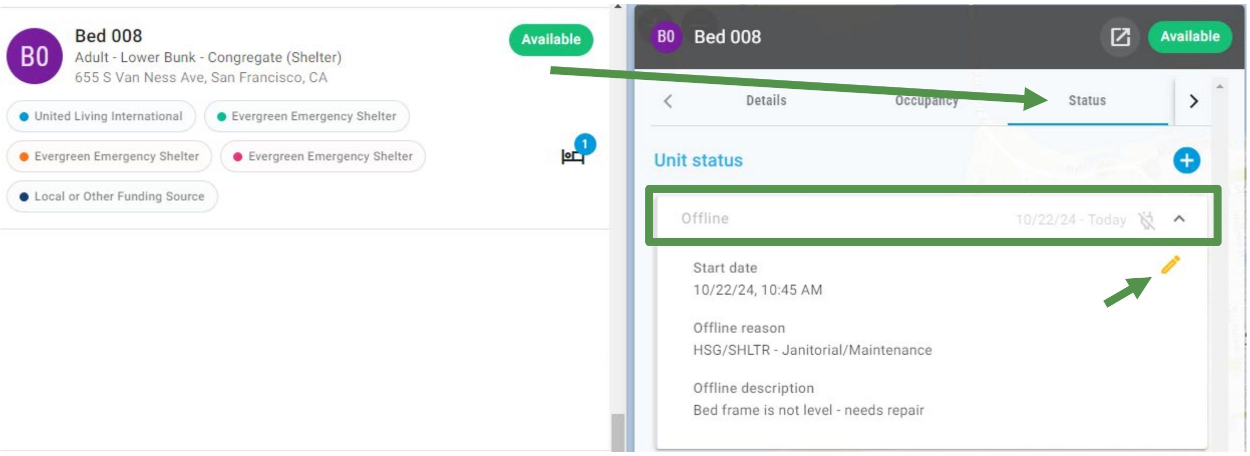




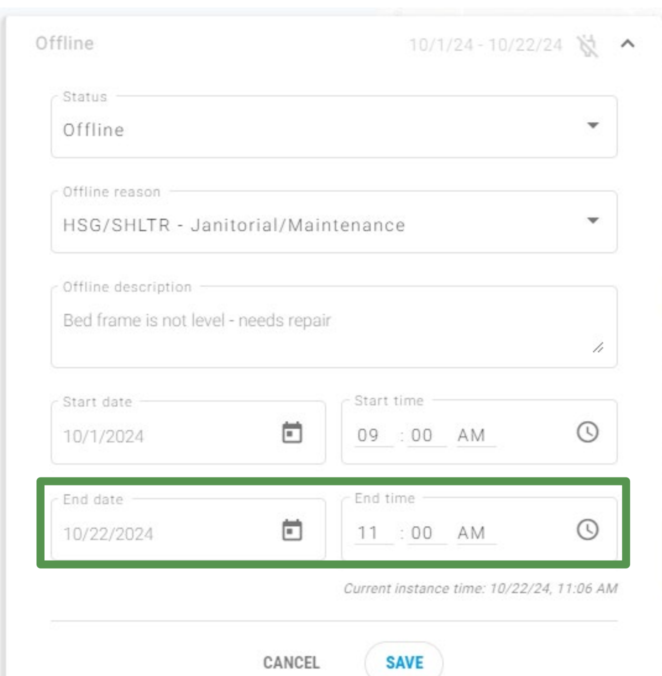
4. Select **Offline** under **New Status** (do <u>not</u> use Inactive). Select the appropriate offline reason and add in any needed notes. Select the appropriate Start date and Start time. Leave the **End date** blank. Click **Save**.
   - Note: If you know when the bed will become available, you can enter an End Date. However, note that the bed will <u>automatically</u> become available at that time. If there is a chance the bed will not be ready for occupancy, do not enter an End Date to avoid the possibility of a referral without a vacant bed.

Make a Unit or Bed Available

1. When a unit/bed is ready to be Available, you need to **end the Offline status**. Open the **Status** section again. Find the most recent **Offline Status**, which will be grey. Click the status entry to expand:

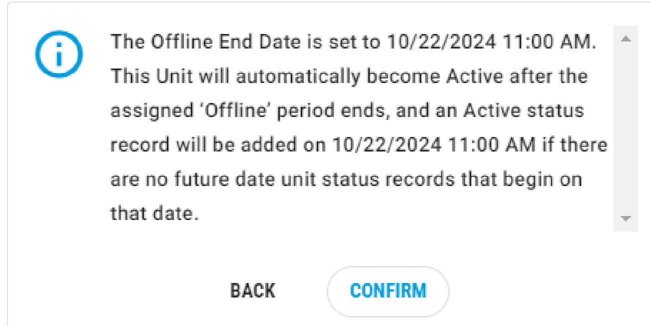


2. Select the yellow pencil tool to **edit** this Offline status.



3. Add an **End date** and **End time** to the Offline status. When the end time has passed, the bed will revert to Available.
   - Note: choosing a time that has already passed will update the status immediately.

4. When you press Save, a pop-up will prompt you to confirm that this will set the unit to Active. Select **Confirm**. The unit will now be Available.



Data on offline reasons is included in reporting and decision-making, so it is important to select the most accurate and appropriate reason when marking a bed offline.

Offline Reason Name	Definitions
Automatically Set to Offline	The unit or bed was automatically set to offline with this reason by the system when the previous household was exited from the program. *Note that congregate shelters do not have this status.*
HSG/SHLTR – Janitorial/Maintenance	The unit or bed is unavailable for client placement due to janitorial or maintenance needs.
HSG/SHLTR – Property Hold	The unit or bed is unavailable due to a property hold. This status can be used for management needs that are not covered by other offline reasons. Always include notes explaining the circumstance.

Important Notes

In cases where a client is occupying a unit/bed that needs repairs, the process for Transferring a Client to a New Bed (page 9) should be followed to transfer the client to another unit. The unit/bed in need of repair should then be set Offline following the process described above.

If a unit needs to be set to permanently offline, please contact your HSH Program Manager to have the status set to Inactive. Do not set units to Inactive without contacting HSH.

If a bed remains offline but the reason for it being offline changes, a new offline status should be added to ensure the history of the bed is accurately recorded. For example, if a unit/bed is offline for Janitorial/Maintenance and then is subsequently unavailable due to a property hold, each window of time should be reflected in a unique offline status.

Review Reports for Accuracy

Review rosters often to ensure that the information in ONE is accurate. To confirm that families are associated with their current units or beds in ONE, review the **Program Roster**, which includes the unit numbers associated with a family's program enrollment. Additional helpful reports can be found in the Data Analysis tab under **Family CES.** To confirm that beds or units are correctly identified as Occupied, Pending Occupancy, Offline, or Available, review the **Family Shelter & Transitional Housing Bed/Unit Roster**.

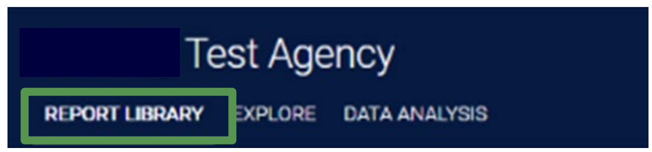
<u>Step by Step</u>

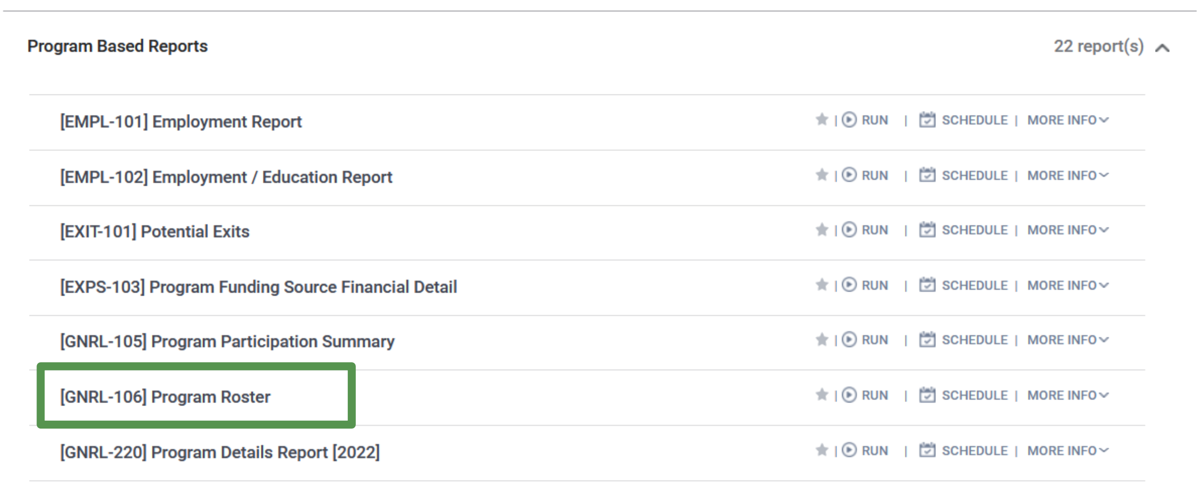
The Program Roster is available to all users within an agency and shows all families enrolled in a program with their unit/bed assignment(s).

1. Program Roster

a. Under the waffle tool, select **Reports**.

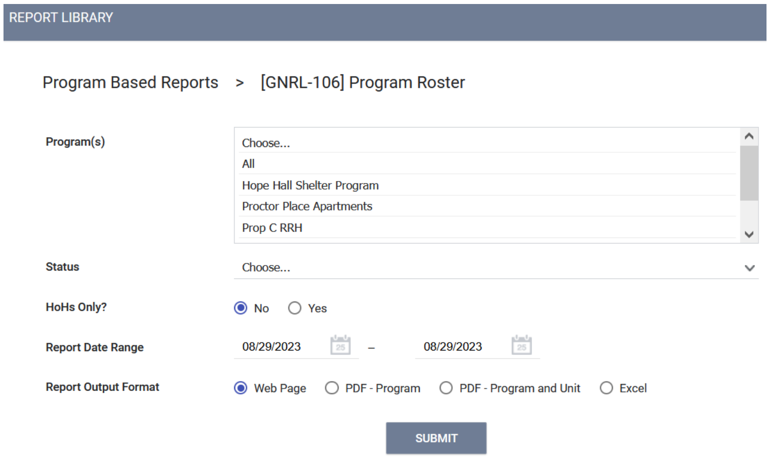
b. Under the **Report Library,** expand **Program Based Reports**. Find **Program Roster**, and click to run.



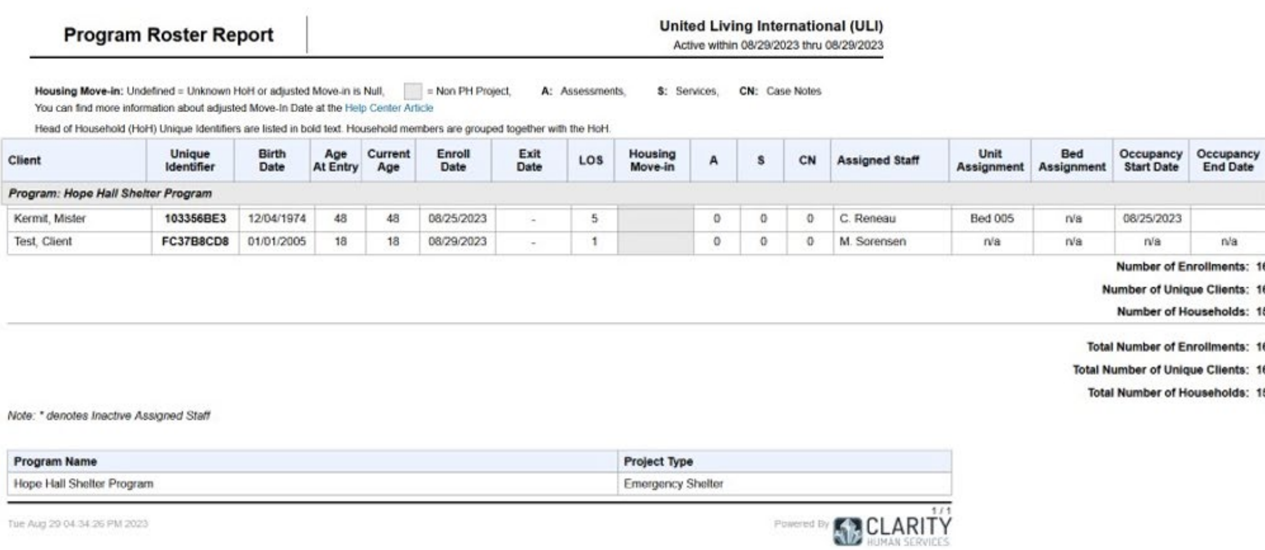


c. Choose "No" for "HoHs Only?", so you can verify that all family members are accurately enrolled in the program.

d. Select either the web or Excel version, which will include the unit/bed information, or select the PDF version that includes both the program and unit.



e. Review the report for accuracy. The current unit/bed assignment(s) for each family will appear in the Unit Assignment column. This column will display “n/a“ if the family is missing their unit/bed assignment.



Program Roster Report

United Living International (ULI)
Active within 08/29/2023 thru 08/29/2023

Housing Move-in: Undefined = Unknown HoH or adjusted Move-in is Null, = Non PH Project, **A:** Assessments, **S:** Services, **CN:** Case Notes
You can find more information about adjusted Move-In Date at the Help Center Article
Head of Household (HoH) Unique Identifiers are listed in bold text. Household members are grouped together with the HoH.

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff	Unit Assignment	Bed Assignment	Occupancy Start Date	Occupancy End Date
Program: Hope Hall Shelter Program																
Kermit, Mister	**103356BE3**	12/04/1974	48	48	08/25/2023	-	5		0	0	0	C. Reneau	Bed 005	n/a	08/25/2023	
Test, Client	**FC37B8CD8**	01/01/2005	18	18	08/29/2023	-	1		0	0	0	M. Sorensen	n/a	n/a	n/a	n/a

Number of Enrollments: 16
Number of Unique Clients: 16
Number of Households: 15

Total Number of Enrollments: 16
Total Number of Unique Clients: 16
Total Number of Households: 15

*Note: * denotes Inactive Assigned Staff*

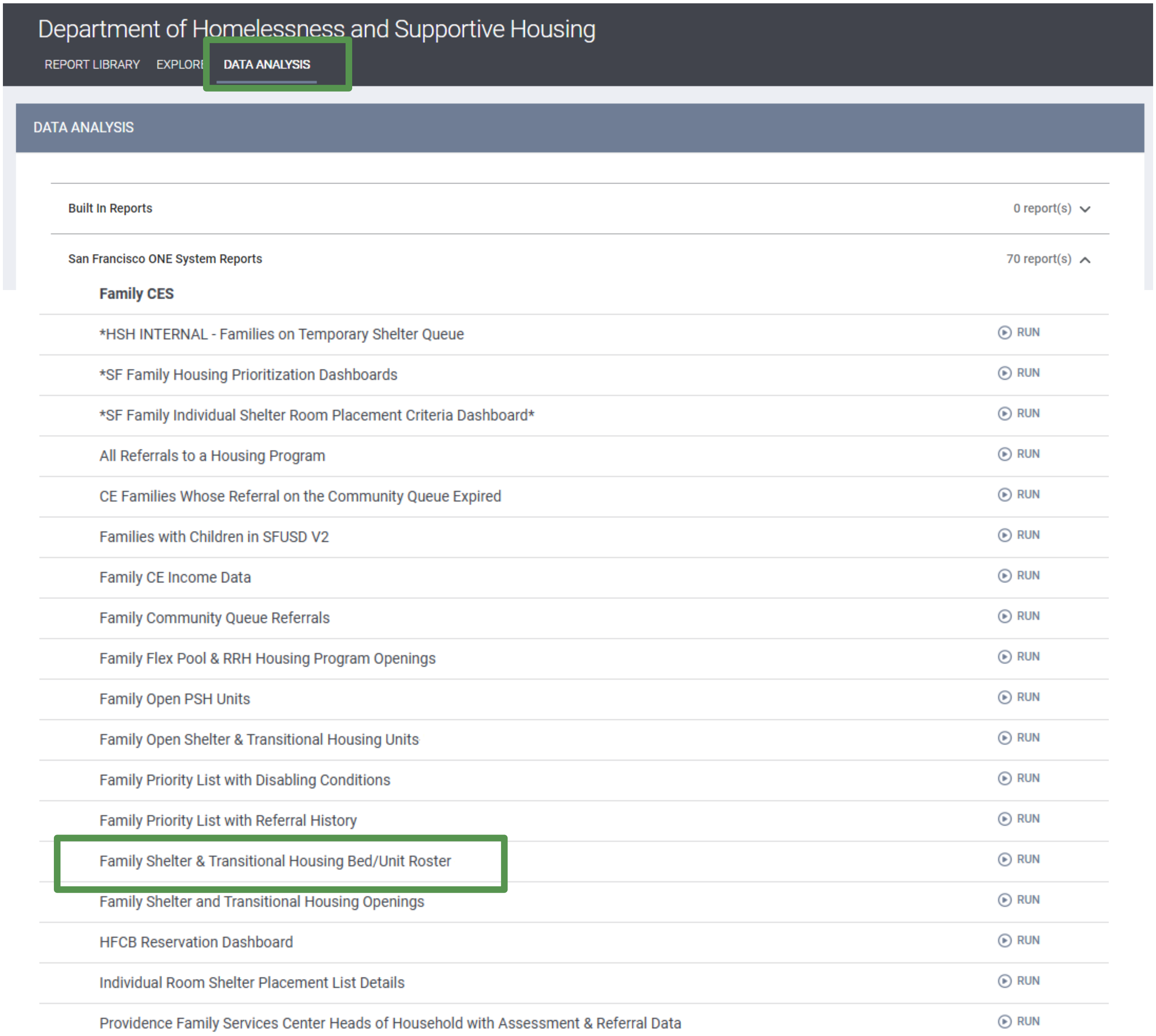
Program Name	Project Type
Hope Hall Shelter Program	Emergency Shelter

Tue Aug 29 04:34:26 PM 2023 1 / 1 Powered By CLARITY HUMAN SERVICES

2. Family Shelter & Transitional Housing Bed/Unit Roster

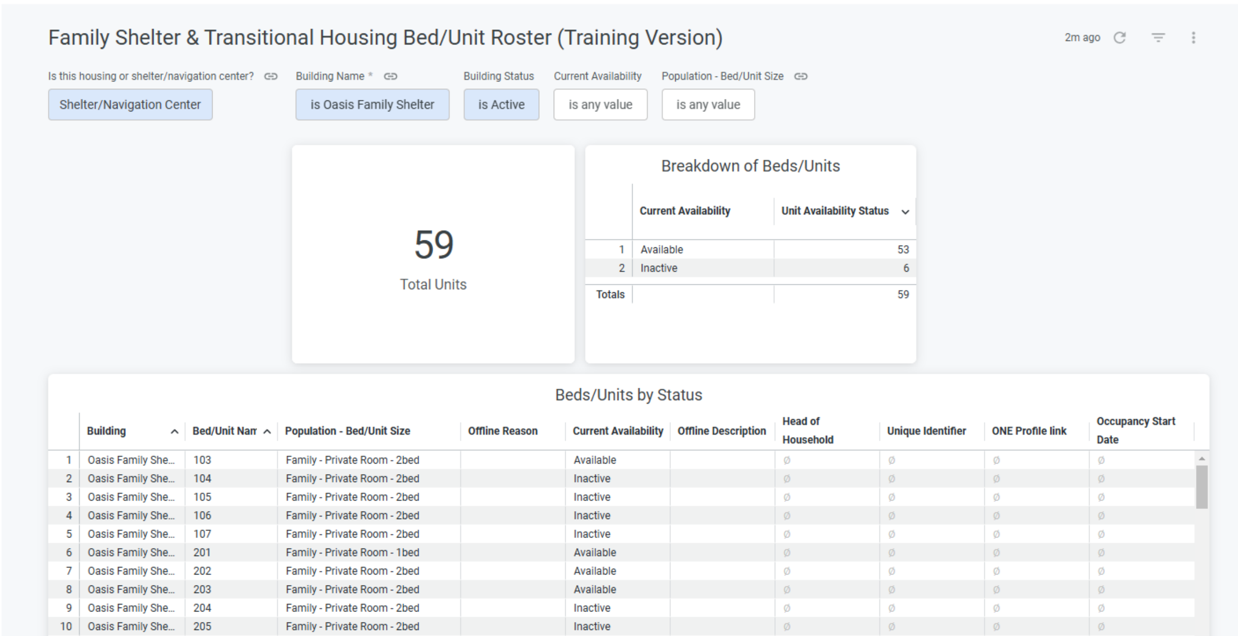
a. Under the waffle tool, select **Reports**. Select the **Data Analysis** tab.

b. Select **San Francisco ONE System Reports** to expand the menu. Under **Family CES**, select the **Family Shelter & Transitional Housing Bed/Unit Roster** report.



c. The **Family Shelter & Transitional Housing Bed/Unit Roster** report provides a summary and detailed roster of units/beds in a building by their status and availability. Units/Beds can be either Occupied, Pending Occupancy, Available, Offline, or Inactive. You can filter this report to only show beds of a certain availability type.

For example, if you only want to view offline beds, select Offline under the **Current Availability** filter to limit the results. Be sure to refresh the report with the blue arrow button if you update the filters. The roster view includes client names, ONE IDs, links to profile, and start dates for the results. Only the household member assigned to the unit/bed (which is almost always the head of household) will appear on this report.



Family Shelter & Transitional Housing Bed/Unit Roster (Training Version)

2m ago

Is this housing or shelter/navigation center?	Building Name *	Building Status	Current Availability	Population - Bed/Unit Size
Shelter/Navigation Center	is Oasis Family Shelter	is Active	is any value	is any value

59

Total Units

Breakdown of Beds/Units

	Current Availability	Unit Availability Status
1	Available	53
2	Inactive	6
Totals		59

Beds/Units by Status

	Building	Bed/Unit Nam	Population - Bed/Unit Size	Offline Reason	Current Availability	Offline Description	Head of Household	Unique Identifier	ONE Profile link	Occupancy Start Date
1	Oasis Family She...	103	Family - Private Room - 2bed		Available		∅	∅	∅	∅
2	Oasis Family She...	104	Family - Private Room - 2bed		Inactive		∅	∅	∅	∅
3	Oasis Family She...	105	Family - Private Room - 2bed		Inactive		∅	∅	∅	∅
4	Oasis Family She...	106	Family - Private Room - 2bed		Inactive		∅	∅	∅	∅
5	Oasis Family She...	107	Family - Private Room - 2bed		Inactive		∅	∅	∅	∅
6	Oasis Family She...	201	Family - Private Room - 1bed		Available		∅	∅	∅	∅
7	Oasis Family She...	202	Family - Private Room - 2bed		Available		∅	∅	∅	∅
8	Oasis Family She...	203	Family - Private Room - 2bed		Available		∅	∅	∅	∅
9	Oasis Family She...	204	Family - Private Room - 2bed		Inactive		∅	∅	∅	∅
10	Oasis Family She...	205	Family - Private Room - 2bed		Inactive		∅	∅	∅	∅