Bitfocus

DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING

Inventory

Family Shelter & Transitional Housing Workflow

December 3, 2024

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Agenda

- What's changing?
- Referral and Placement
- Moving to a Different Unit/Bed
- Exiting
- Unit/Bed Status
- Reports

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What is Inventory?

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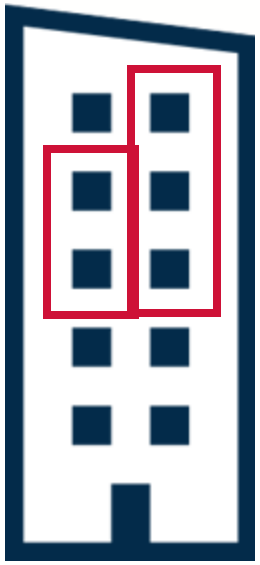
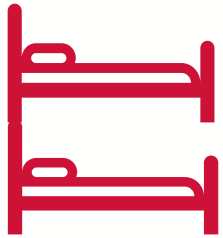
Inventory Overview

Buildings »» Unit Configurations »» Units/Beds





INVENTORY Dashboard

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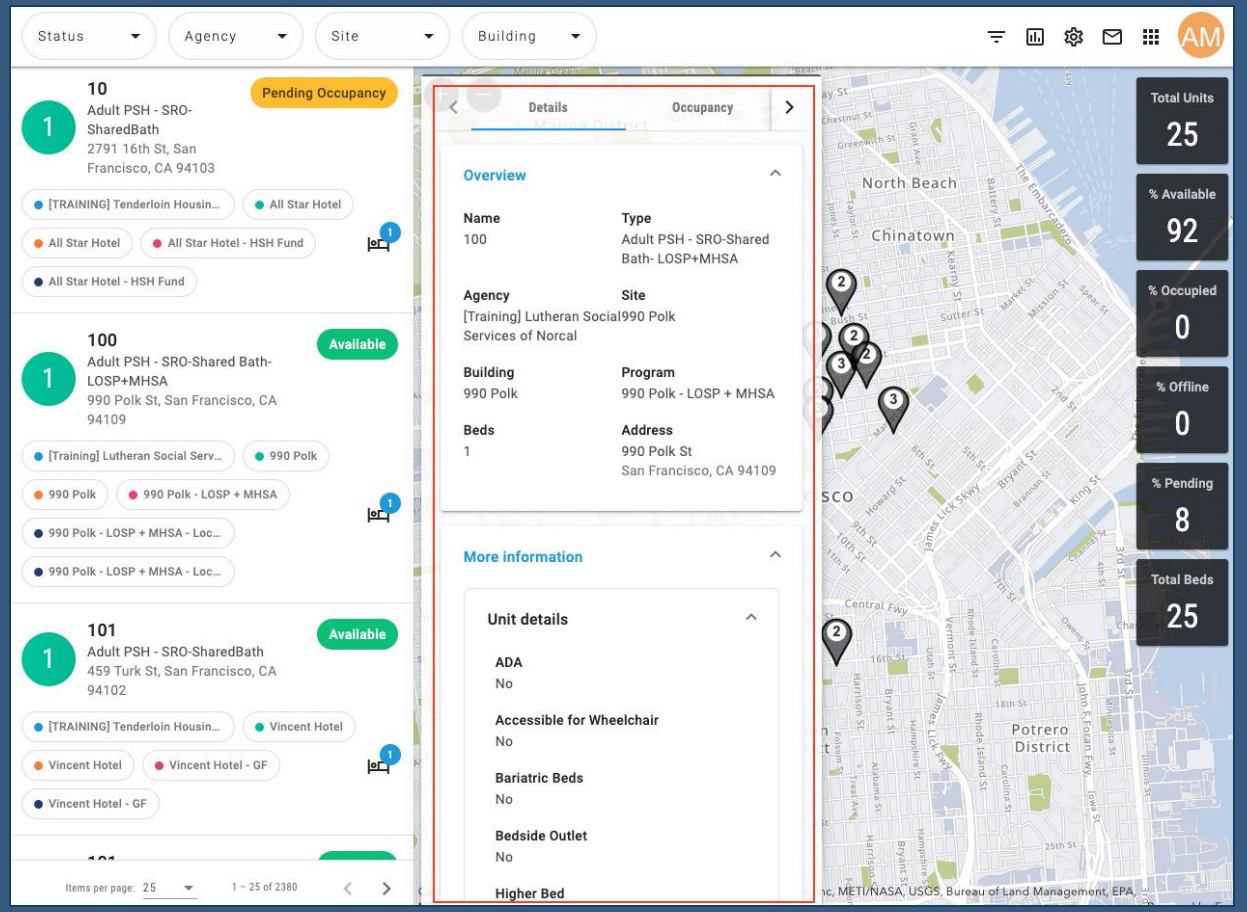
INVENTORY Dashboard

- Show detailed unit/bed-level information
- Quick occupancy information
- Update unit/bed status (for those w/ access)



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Workflow

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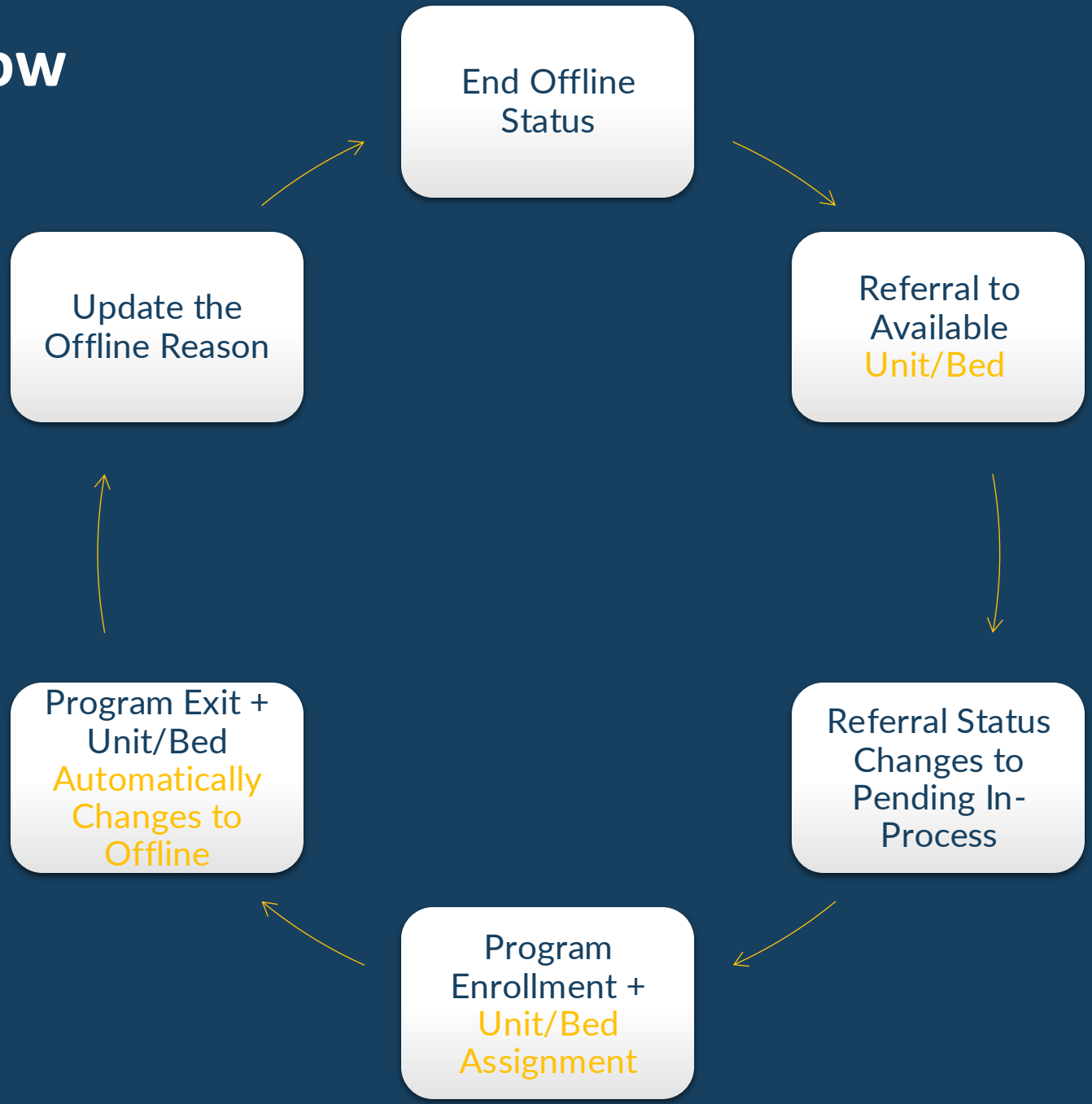
Workflow Changes

New Workflow



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Referrals

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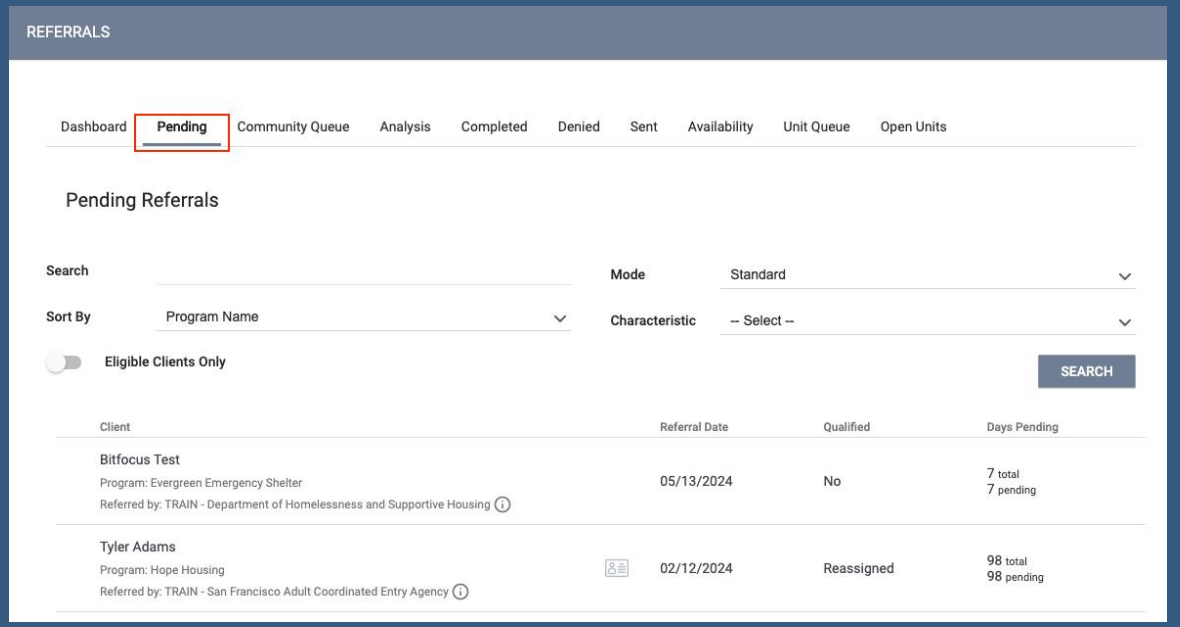
Referral from Access Point

- Access Point sends a referral
- The referral is **only made for the Head of Household** (HoH)
  - Pending Tab shows referrals for the user's agency
  - Filters allow you to refine your search



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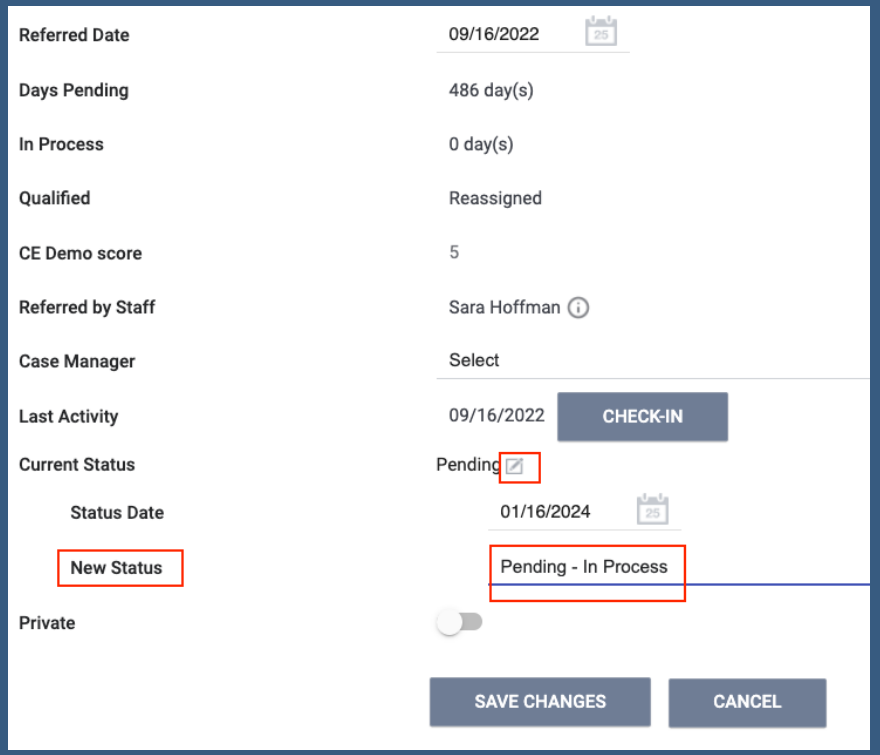
Pending In-Process

- Can change the referral status under the *Pending Tab*
- Notifies the access points the referral was received



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Denying Referrals

Referrals may be denied due to ineligibility, refusal of resource, and more.

- Status: Denied
- Send to Community Queue
- Denied by Type
- Denied Reason
- Denial Information

This step is very important! Units/beds will continue to show as Pending Occupancy if not denied

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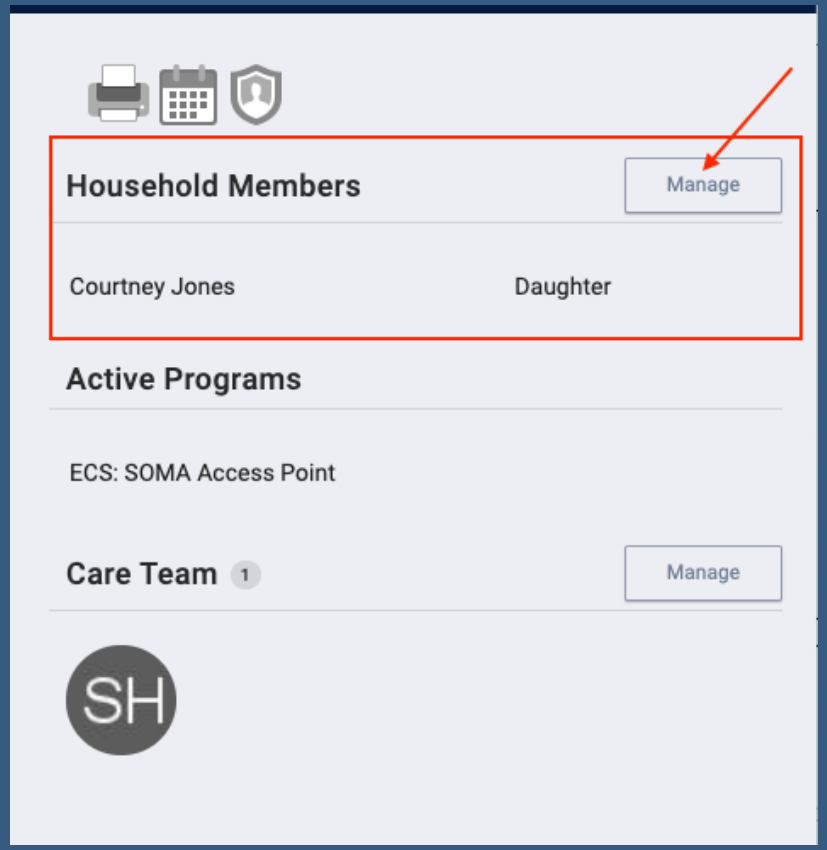
Household Composition

From the client profile page:

- Confirm the household composition is correct
- Add or remove people if needed



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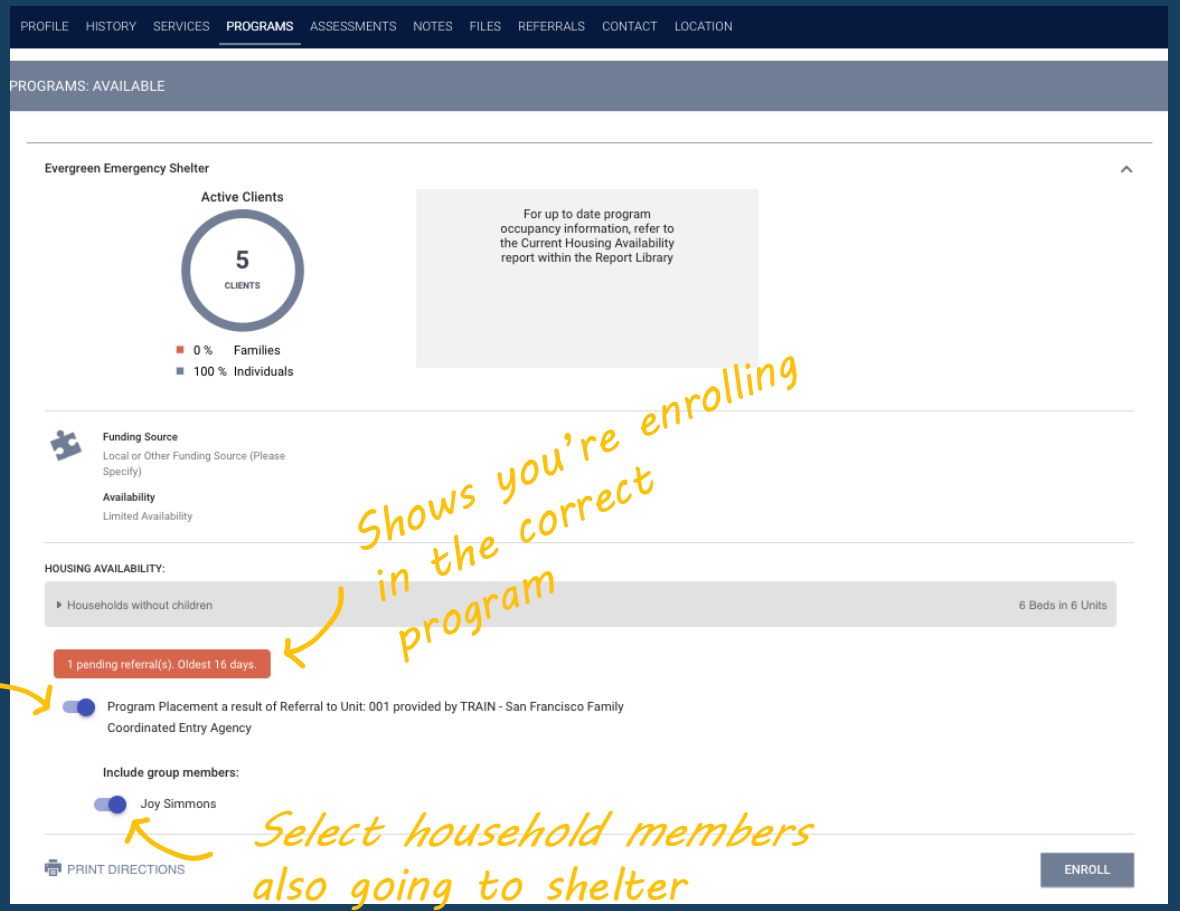
Accepting Referrals



Toggle must be on to accept the referral

Shows you're enrolling in the correct program

Select household members also going to shelter

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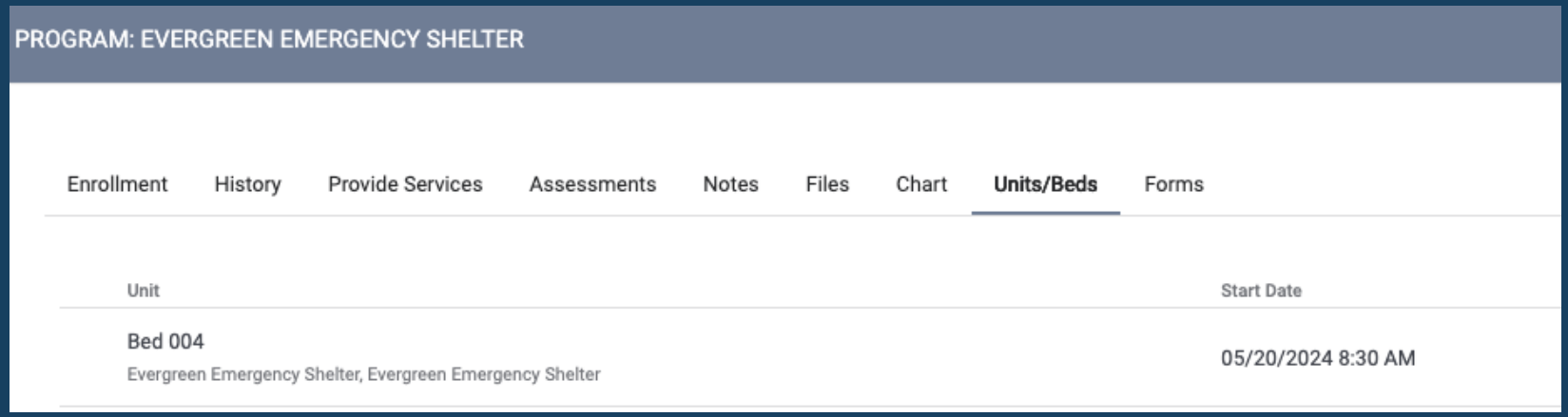
Unit/Bed Assignment

- Unit/Bed will already be assigned
- Unit/Bed assignment **only shows in the HoH record**



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Enrollment Sidebar

- Unit/Bed assignment only visible in the enrollment sidebar for HoH

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Moving Units/Beds

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Moving Units/Beds

Staff can move family to a different unit/bed

End stay in current unit/bed
Action: Enter end date

Assign to new unit/bed
Action: Click *Add Unit/Bed*

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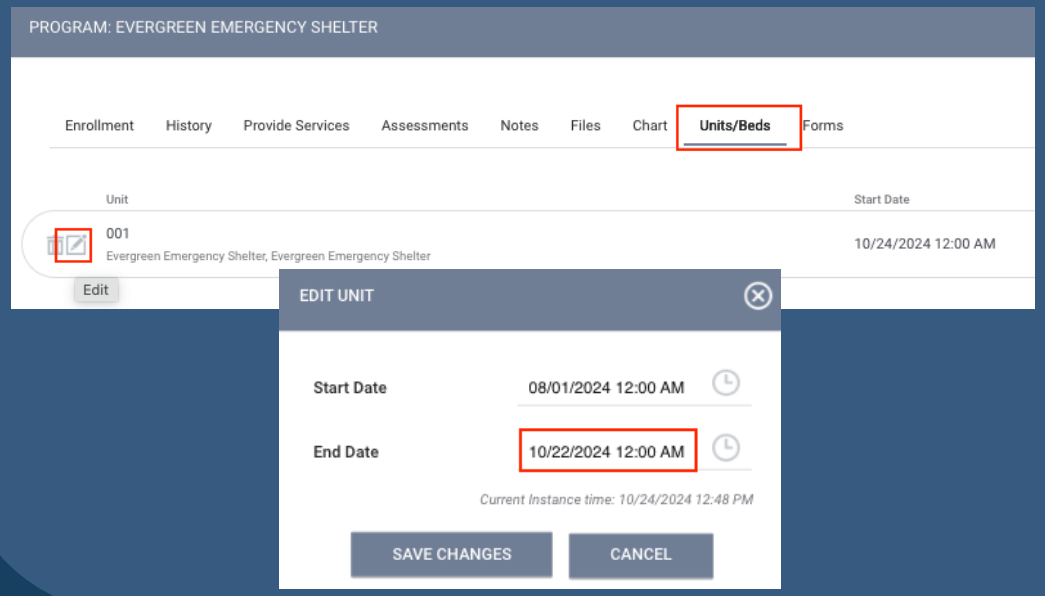
Moving Units/Beds

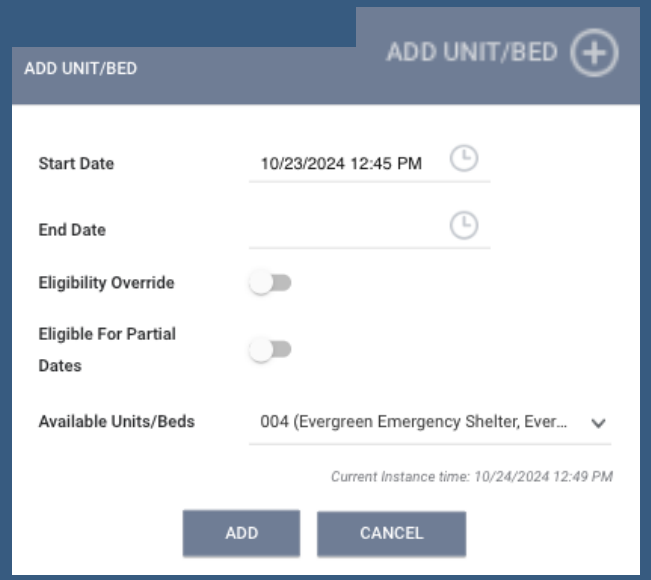
End Current Unit/Bed Stay

- Add an end date to the current unit/bed



Assign to a New Unit/Bed

- Assign HoH to a new unit/bed
- Start date should not overlap with end date of old unit/bed



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Exits

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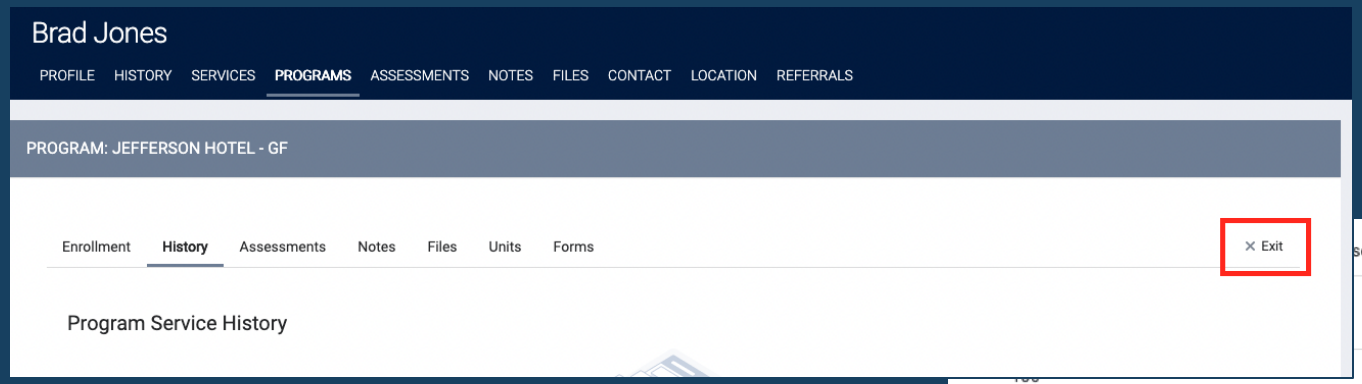
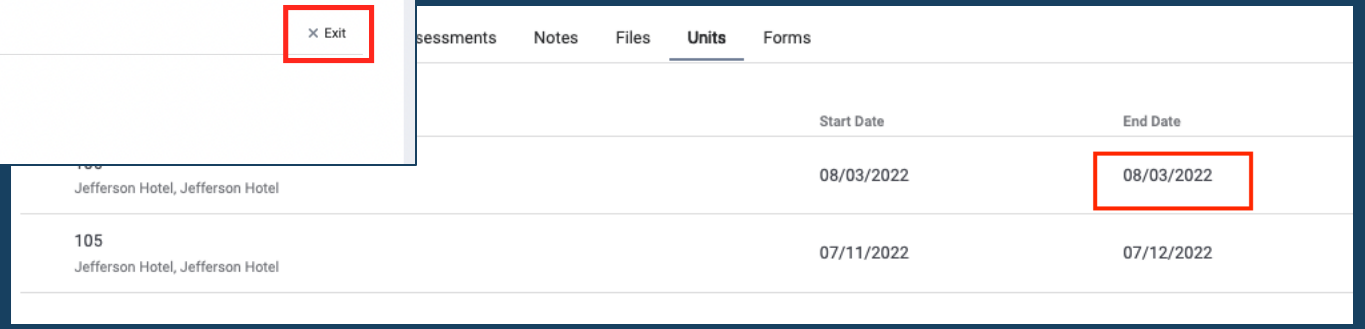
Exiting Client from Unit/Bed

- Exits should occur when a family is no longer staying at the shelter
- Exiting from a program will automatically exit HoH from the unit/bed
  - Complete an exit for all household members





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Exit Reason and Destination

- Exit Reason and Destination must be entered
- Exit Reason and Destination should align

Example: If Exit Reason is "Exit to Permanent Housing", then Destination should reflect permanent housing

Some common Reason and Destination combinations

Exit Reason	Destination
48- Hour Bed Abandonment	No Exit Interview Completed
Intersystem Transfer	Emergency Shelter
Exit to Permanent Housing	Rental by Client, with Housing Subsidy
Exit to Transitional Housing	Transitional Housing
Exit to Institutional Setting	Hospital
	Substance Use Treatment

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Unit/Bed Status

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Unit/Bed Status/Availability

- *Unit Status* can be changed from the dashboard
- Provides the ability to reflect a unit's status in real-time

Status	Availability	Description
Active	Available	Bed/unit is available to receive guest
	Occupied	Guest is living in the bed or unit
	Pending Occupancy	Bed/unit has a pending referral connected to it
Offline		Bed/unit is temporarily unavailable (e.g., due to needed maintenance).
Inactive		Bed/unit not available for referral for the foreseeable future (e.g., used as an office). *Call or email help desk to set to inactive or if accidentally made inactive.*

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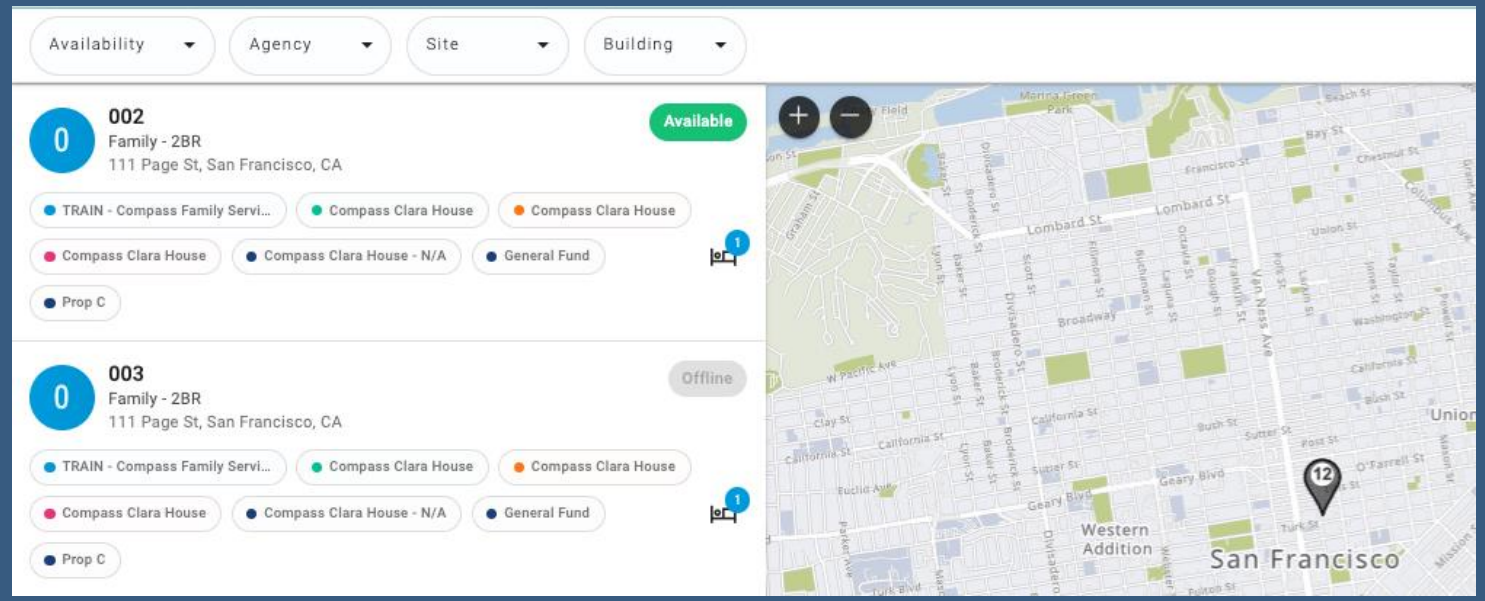
Automatic Offline Functionality

- The system will automatically switch the unit/bed to offline when family exited from the program.



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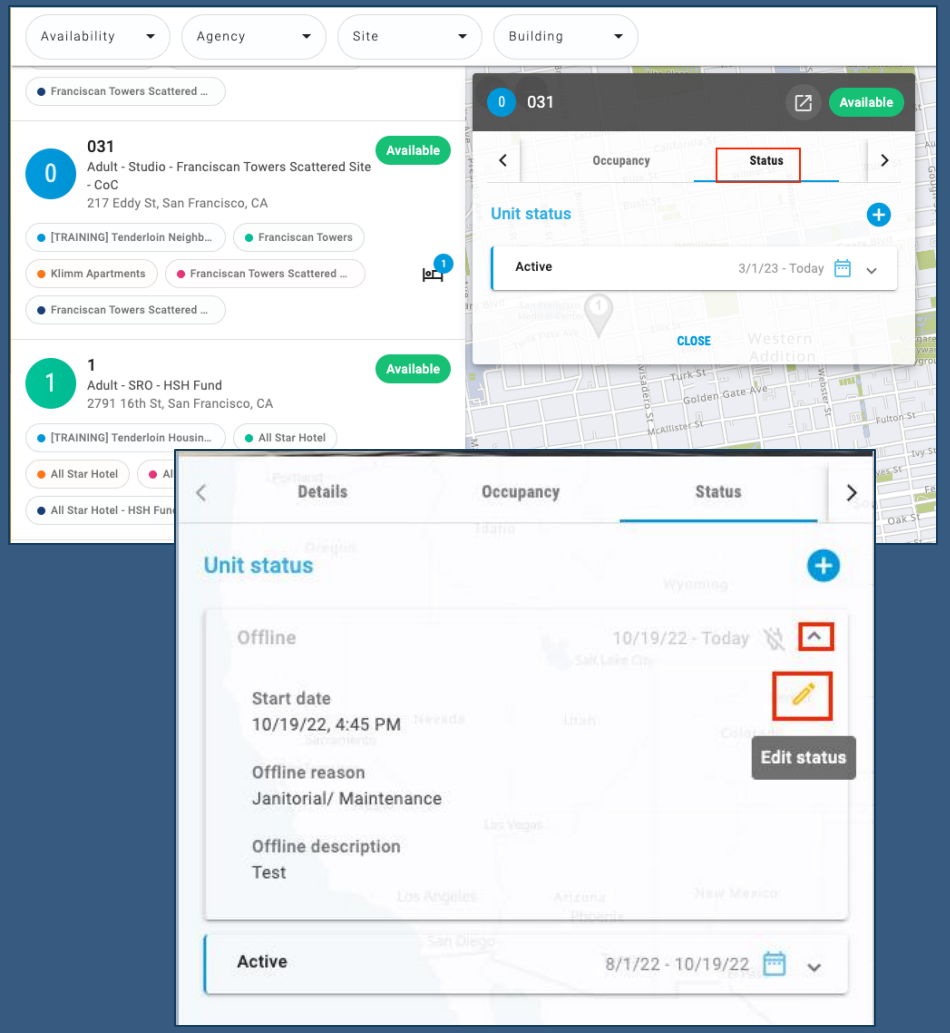
Updating Offline Reason and Description

- Open the *Display Card* for the unit
- Edit by clicking pencil icon
- Update Offline Reason and Description



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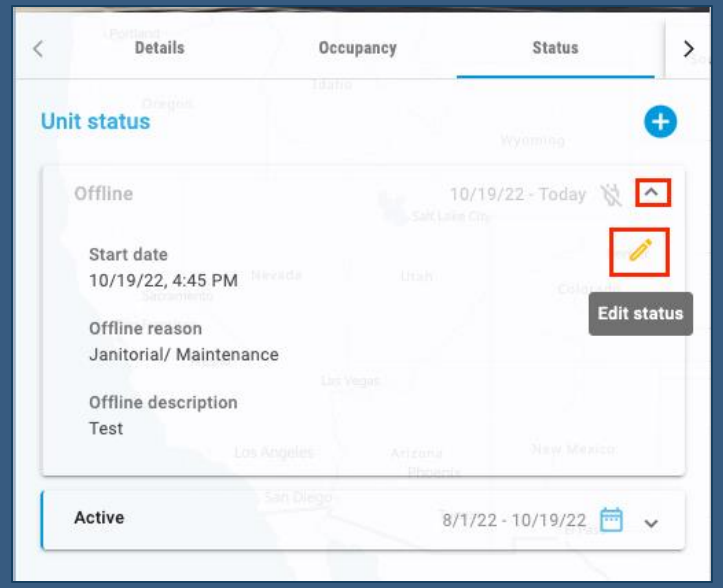
Ending or Creating Offline Status

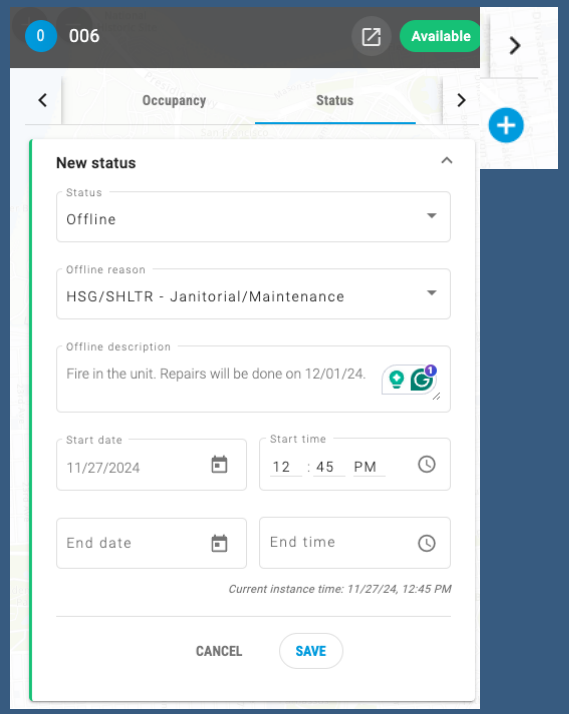
Ending

- Click on the pencil icon
- Enter End Date



Creating

- Blue + sign
- Leave End Date blank



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Reports

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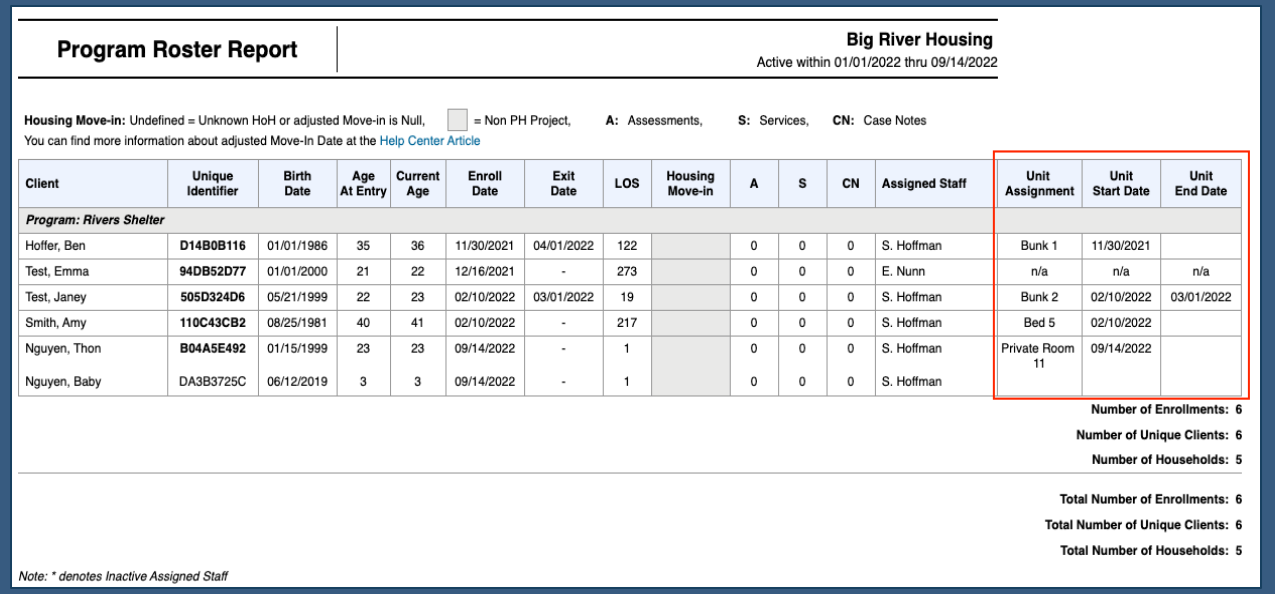
Program Roster

- Located in the Report Library
- Program stay information for selected programs
- Includes unit/bed assignment
- Unit assignment shows for the HoH



Program Roster Report

Big River Housing
Active within 01/01/2022 thru 09/14/2022

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

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	Unit Start Date	Unit End Date
Program: Rivers Shelter															
Hoffer, Ben	**D14B0B116**	01/01/1986	35	36	11/30/2021	04/01/2022	122		0	0	0	S. Hoffman	Bunk 1	11/30/2021	
Test, Emma	**94DB52D77**	01/01/2000	21	22	12/16/2021	-	273		0	0	0	E. Nunn	n/a	n/a	n/a
Test, Janey	**505D324D6**	05/21/1999	22	23	02/10/2022	03/01/2022	19		0	0	0	S. Hoffman	Bunk 2	02/10/2022	03/01/2022
Smith, Amy	**110C43CB2**	08/25/1981	40	41	02/10/2022	-	217		0	0	0	S. Hoffman	Bed 5	02/10/2022	
Nguyen, Thon	**B04A5E492**	01/15/1999	23	23	09/14/2022	-	1		0	0	0	S. Hoffman	Private Room 11	09/14/2022	
Nguyen, Baby	DA3B3725C	06/12/2019	3	3	09/14/2022	-	1		0	0	0	S. Hoffman			

Number of Enrollments: 6
Number of Unique Clients: 6
Number of Households: 5

Total Number of Enrollments: 6
Total Number of Unique Clients: 6
Total Number of Households: 5

*Note: * denotes Inactive Assigned Staff*

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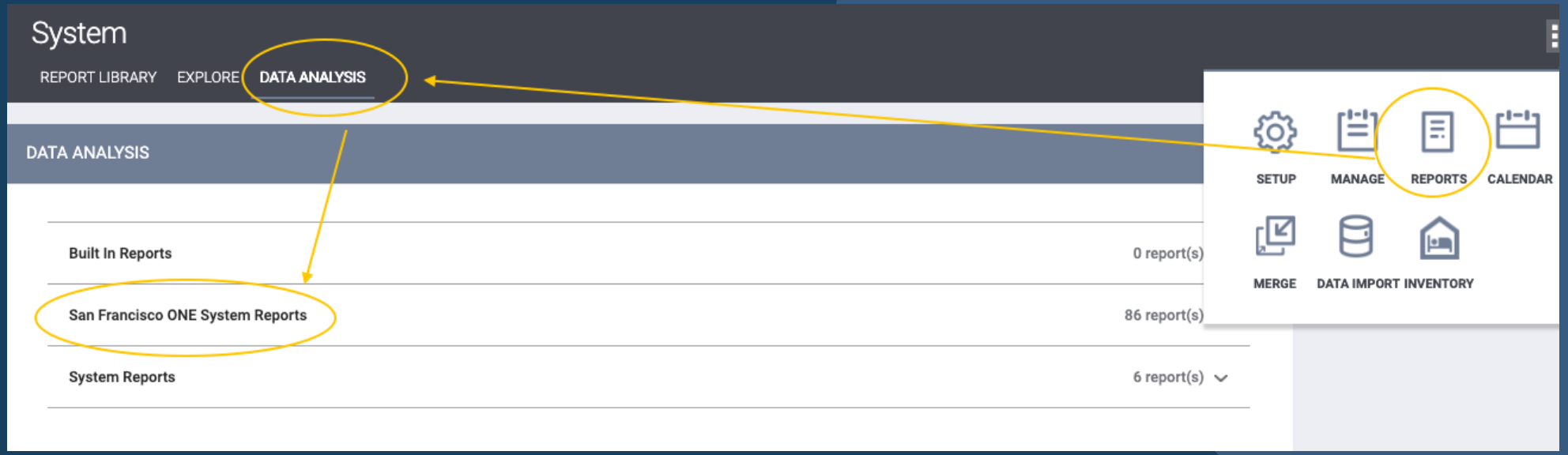
Inventory Reports

- Located under the *Data Analysis Tab*



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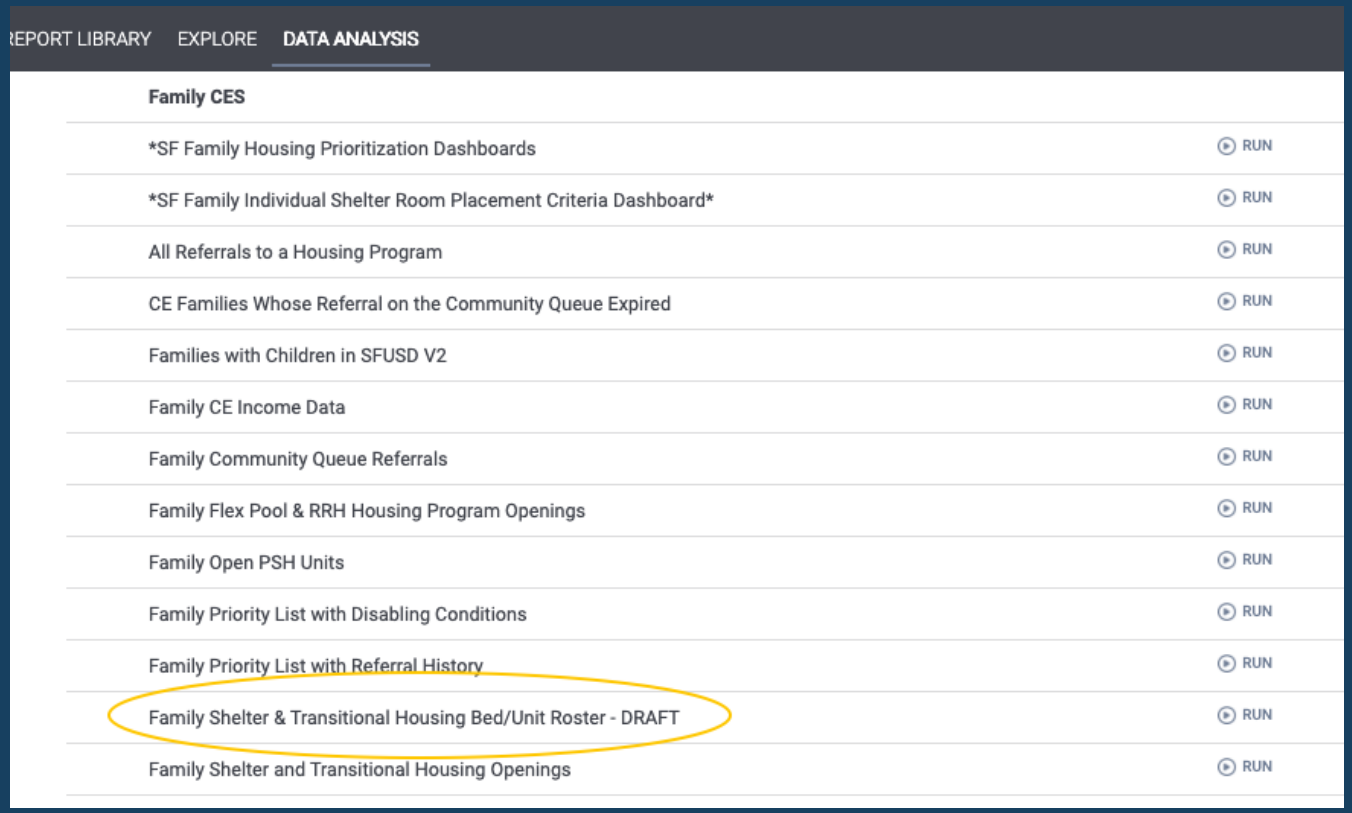
Shelter and Transitional Housing Bed/Unit Roster

- Located under the Family CES section



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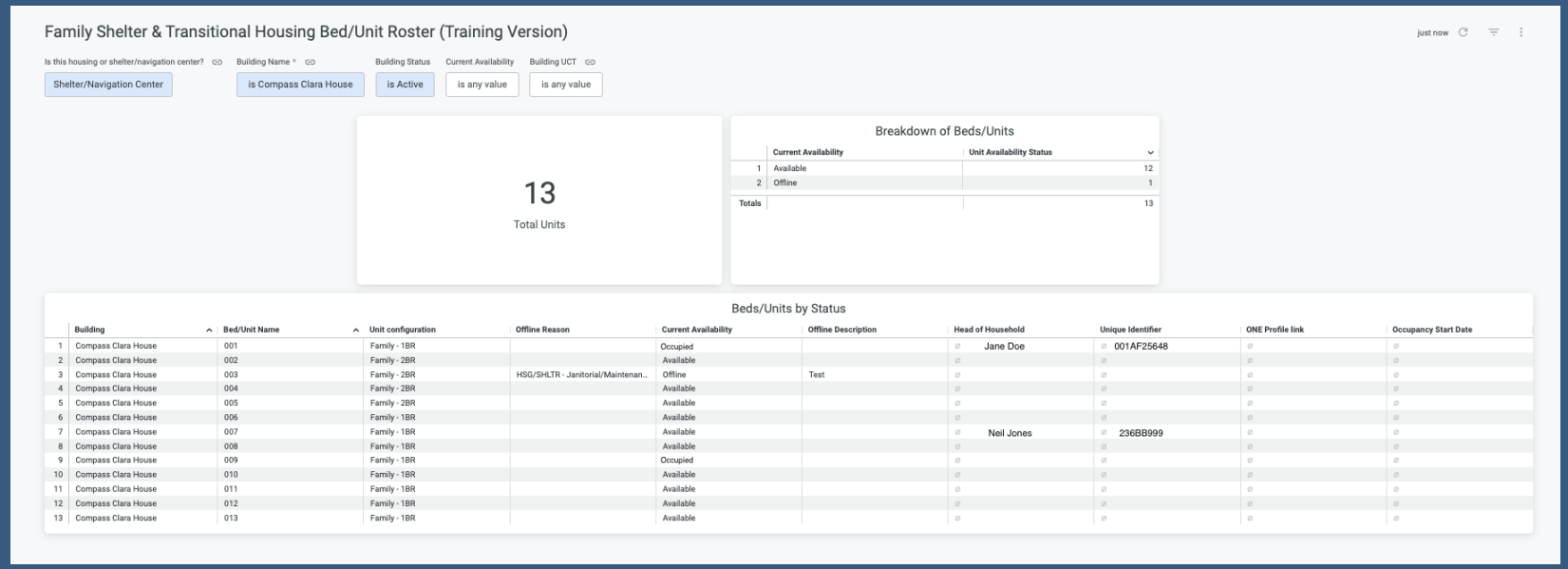
Shelter & Transitional Housing Bed/Unit Roster

- Roster organized by bed/unit number
- All beds/units in your buildings with associated status
- If bed/unit is occupied, the HoH is listed



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

just now

Is this housing or shelter/navigation center?	Building Name *	Building Status	Current Availability	Building UCT
Shelter/Navigation Center	is Compass Clara House	is Active	is any value	is any value

13
Total Units

Breakdown of Beds/Units

	Current Availability	Unit Availability Status
1	Available	12
2	Offline	1
Totals		13

Beds/Units by Status

	Building	Bed/Unit Name	Unit configuration	Offline Reason	Current Availability	Offline Description	Head of Household	Unique Identifier	ONE Profile link	Occupancy Start Date
1	Compass Clara House	001	Family - 1BR		Occupied		Jane Doe	001AF25648		
2	Compass Clara House	002	Family - 2BR		Available					
3	Compass Clara House	003	Family - 2BR	HSG/SHLTR - Janitorial/Maintenan...	Offline	Test				
4	Compass Clara House	004	Family - 2BR		Available					
5	Compass Clara House	005	Family - 2BR		Available					
6	Compass Clara House	006	Family - 1BR		Available					
7	Compass Clara House	007	Family - 1BR		Available		Neil Jones	236BB999		
8	Compass Clara House	008	Family - 1BR		Available					
9	Compass Clara House	009	Family - 1BR		Occupied					
10	Compass Clara House	010	Family - 1BR		Available					
11	Compass Clara House	011	Family - 1BR		Available					
12	Compass Clara House	012	Family - 1BR		Available					
13	Compass Clara House	013	Family - 1BR		Available					

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Next steps & Support

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Next Steps

Ensure that all units/beds statuses are correct by **Friday** (December 6th)

No new referrals on Monday (December 9th) to convert pending referrals and update reports

Go live with new workflow on Tuesday (December 10th)

Referrals will be made directly to available units/beds from December 10th onward

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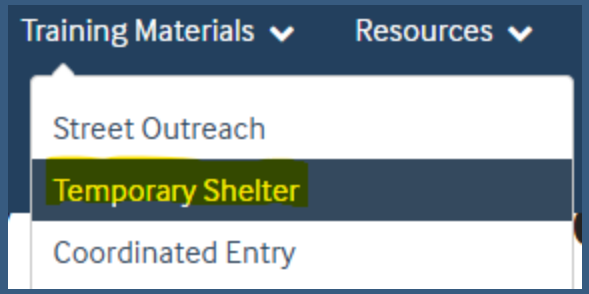
What if I Need Support?

- **HSH ONE Team Liaisons**
  - Each program has been assigned two HSH ONE Team staff to provide support
- Training Materials on ONE System Help Site: https://onesf.bitfocus.com/temporary-shelter
  - Tip Sheets (Desk Guide)
  - Training slides and videos



- Contact Help Desk at onesf@bitfocus.com for ongoing questions and support

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Questions?

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