



Bitfocus



DEPARTMENT OF
HOMELESSNESS AND
SUPPORTIVE HOUSING

Inventory

Temporary Shelter Workflow

MSC South, Next Door, Sanctuary

Agenda

- Inventory Overview
- Workflow
- Reports
- Questions & Support



What is INVENTORY?



Inventory Overview

Inventory allows us to:

- Match clients in the ONE System to the beds they're sleeping in
- Track and view the current status of each bed in your shelter
- Support referrals into your shelter from other agencies
- Phase out the use of RTZ

Inventory Overview

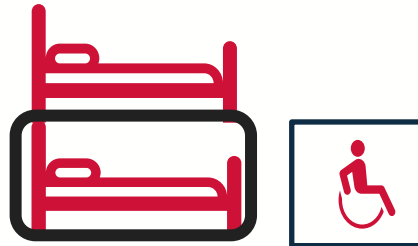
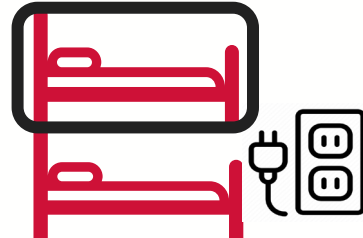
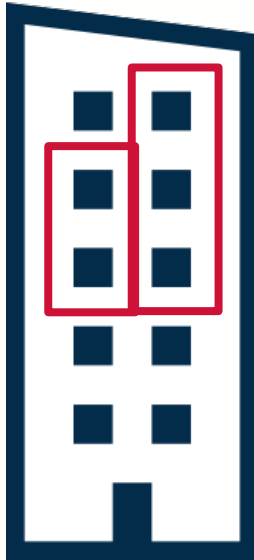
Buildings



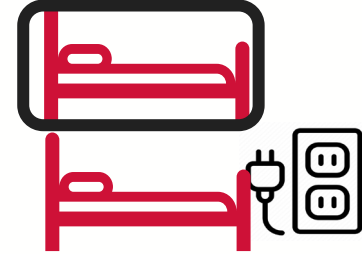
Unit Configurations



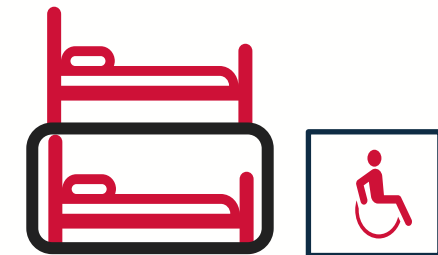
Beds



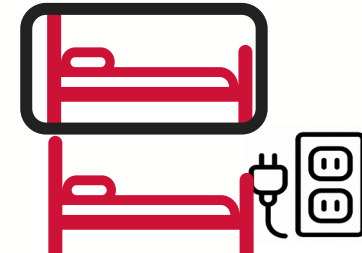
Bed 001 (SF311)



Bed 002 (SF311)



Bed 003 (CAAP)



INVENTORY Dashboard



INVENTORY Dashboard

- Map view of bed details and locations
- Filters can be used to control what information is viewed

The screenshot displays the INVENTORY Dashboard interface. At the top, there are filter dropdowns for Status, Agency, Site, and Building. The main content area is divided into three columns:

- Left Column (List View):** Shows a list of units with their IDs, names, addresses, and status. Unit 10 is marked as "Pending Occupancy", while units 100 and 101 are marked as "Available". Each unit entry includes a list of filters and a location pin icon.
- Middle Column (Details Panel):** A detailed view of unit 100, showing its overview, agency, building, beds, and more information. The overview includes the name (100), type (Adult PSH - SRO-Shared Bath- LOSP+MHSA), agency ([Training] Lutheran Social Services of Norcal), and site (990 Polk). The building is 990 Polk, and there is 1 bed. The address is 990 Polk St, San Francisco, CA 94109.
- Right Column (Map View):** A map of San Francisco showing the locations of the units. Unit 10 is marked with a red pin, while units 100 and 101 are marked with green pins. A summary panel on the right side of the map provides key statistics: Total Units (25), % Available (92), % Occupied (0), % Offline (0), % Pending (8), and Total Beds (25).

INVENTORY Display Cards

- Shows detailed bed info
- Quick occupancy information
- Ability to update status

The screenshot displays a web application interface for managing housing inventory. It features a list of units on the left, a detailed view of a selected unit in the center, and a map on the right showing the geographic distribution of units. A summary panel on the far right provides key statistics.

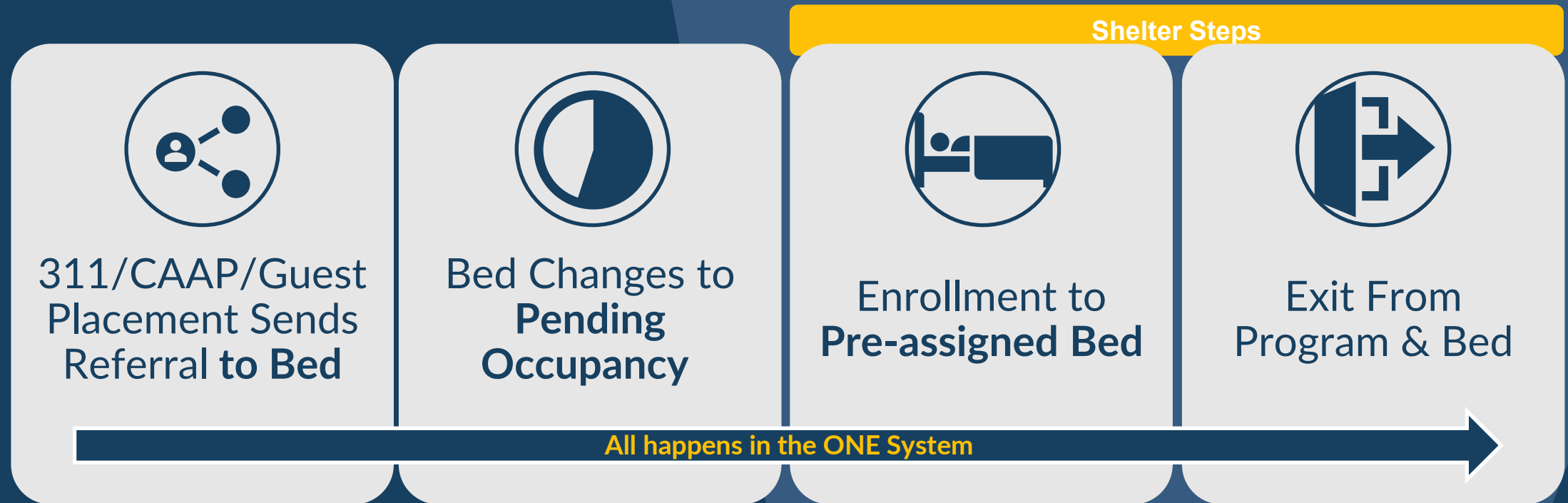
Unit ID	Status	Type	Address
10	Pending Occupancy	Adult PSH - SRO-SharedBath	2791 16th St, San Francisco, CA 94103
100	Available	Adult PSH - SRO-Shared Bath-LOSP+MHSA	990 Polk St, San Francisco, CA 94109
101	Available	Adult PSH - SRO-SharedBath	459 Turk St, San Francisco, CA 94102

Summary Statistics:

- Total Units: 25
- % Available: 92
- % Occupied: 0
- % Offline: 0
- % Pending: 8
- Total Beds: 25

Temporary Shelter Workflow

Temporary Shelter Workflow



Referral and Placement Steps

REFER

ACCEPT

ENROLL

PLACE

Referral from 311/CAAP/Guest Placement

- Referral Partner sends a *Referral*
- Referral Partner is listed in the *Referred By* field.
- Notes may be included in the referral

REFERRALS

Pending Community Queue Analysis Completed Denied Sent Availability Open Units

Pending Referrals

Search Mode Standard

Sort By Default Characteristic -- Select --

Eligible Clients Only

Client	Referral Date	Qualified	Days Pending
Jenny Jones Program: Haight Street Apartments Referred by: [TRAINING] Department of Homelessness and Supportive	01/07/2022	Reassigned	282 total 0 pending

REFER

ACCEPT

ENROLL

PLACE

Pending Tab

- Shows referrals for the user's agency
- Filters allow you to refine your search
 - Usually, filter by program

REFERRALS

Dashboard **Pending** Community Queue Analysis Completed Denied Sent Availability Unit Queue Open Units

Pending Referrals

Search Mode Standard

Sort By Program Name Characteristic -- Select --

Eligible Clients Only

Client	Referral Date	Qualified	Days Pending
Bitfocus Test Program: Evergreen Emergency Shelter Referred by: TRAIN - Department of Homelessness and Supportive Housing ⓘ	05/13/2024	No	7 total 7 pending
Tyler Adams Program: Hope Housing Referred by: TRAIN - San Francisco Adult Coordinated Entry Agency ⓘ	02/12/2024	Reassigned	98 total 98 pending

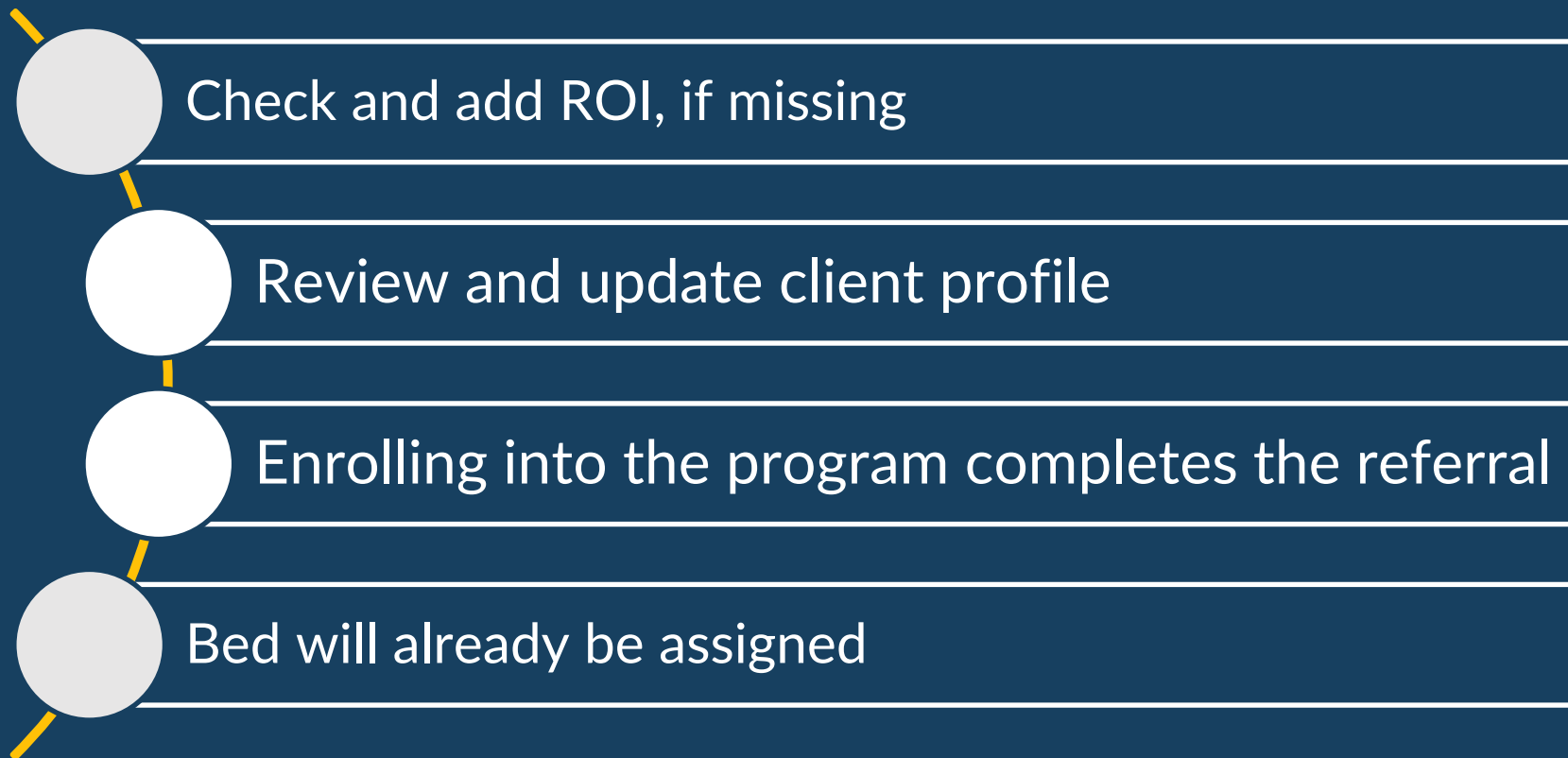
Denying Referrals

- Deny the referral if a client refuses placement or doesn't show
 - *Status:* Denied
 - *Send to Community Queue:* **No**
 - *Denied by Type:* Client
 - *Denied Reason:* Client did not show up or refused services
 - Must provide additional details

*This step is very important!
If not denied, beds will
continue to show as Pending
Occupancy*

Status	Denied	▼
Send to Community Queue	No	▼
Denied By Type	Client	▼
Denied Reason	Client refused services	▼
Denial Information	Client came to shelter and said they did not want to stay	

Accepting Referrals



Accepting Referrals - Check and add ROI

- Check for current ROI
- Add ROI if missing or permission not provided

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES REFERRALS CONTACT LOCATION SEARCH CASELOAD

▲ Release of Information is Missing or Permission Not Provided. Please review to ensure compliance. MANAGE

PRIVACY

Client Privacy Public Private

SAVE CHANGES CANCEL

RELEASE OF INFORMATION ADD RELEASE OF INFORMATION (+)

Permission	Type	Start Date	End Date	Version
No TRAIN - Episcopal Community Services CA-501		07/31/2024		V.6

Household Members
No active members

Care Team
No active members

Accepting Referrals – Review and Update Client Profile

- Ensure client profile is up to date and complete

Tanya Anderson

[PROFILE](#)
[HISTORY](#)
[SERVICES](#)
[PROGRAMS](#)
[ASSESSMENTS](#)
[NOTES](#)
[FILES](#)
[REFERRALS](#)
[CONTACT](#)
[LOCATION](#)

CLIENT PROFILE

Social Security Number	XXX - XX - 7436	
Quality of SSN	Full SSN Reported ▼	
Last Name	Anderson	
First Name	Tanya	
Quality of Name	Full name reported ▼	
Quality of DOB	Approximate or partial DOB reported ▼	
Date of Birth	09/18/1977	Adult. Age: 46
Middle Name	Suffix	None ▼
Alias		
What is the client's current gender identity?	Woman (Girl, if child) ▼	
What is the appropriate pronoun to use when addressing the client?	Select ▼	

UNIQUE IDENTIFIER

AF4CC0A44

Accepting Referrals - Enroll Guest

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

1 CLIENT

0 % Families
100 % Individuals

For up to date program occupancy information, refer to the Current Housing Availability report within the Report Library

Funding Source
Local or Other Funding Source (Please Specify)

Availability
Limited Availability

HOUSING AVAILABILITY:

Households without children 6 Beds in 6 Units

1 pending referral(s). Oldest 7 days.

Program Placement a result of Referral to Unit: Bed 005 provided by TRAIN - Department of Homelessness and Supportive Housing

PRINT DIRECTIONS ENROLL

Toggle must be on to accept the referral

Shows you're enrolling in the correct program

Bed Assignment

- Bed will already be assigned

PROGRAM: EVERGREEN EMERGENCY SHELTER

Enrollment History Provide Services Assessments Notes Files Chart **Units/Beds** Forms

Unit

Start Date

Bed 004

Evergreen Emergency Shelter, Evergreen Emergency Shelter

05/20/2024 8:30 AM

Enrollment Sidebar

- Once the client is assigned to a bed, it's visible in the enrollment sidebar

5 DAYS ACTIVE PROGRAM	
Program Type:	Individual
Program Start Date:	08/14/2024
Assigned Staff:	Scott Jackson <input type="checkbox"/>
Head of Household:	April Adams <input type="checkbox"/>
Unit Name:	Bed 010 (CAAP)

Transferring Beds

Transferring Beds



Staff can move clients to a different bed



End stay in current bed
Action: Enter end date



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

Bed can be changed when the client arrives, after enrollment

Transferring Beds

End Current Bed Stay

- Add an end date to the current bed

PROGRAM: HOPE HALL SHELTER PROGRAM

ADD UNIT/BED +

Enrollment History Provide Services Events Assessments Notes Files Chart **Units/Beds** Forms X Exit

Unit

Bed 001
Hope Hall, Hope Hall Navigation Center

Edit

End Date

EDIT UNIT

Start Date 05/23/2023 11:45 AM

End Date 08/22/2023 5:00 PM

Current Instance time: 08/23/2023 2:11 PM

SAVE CHANGES CANCEL

Assign to a New Bed

- Assign client to a new bed
- Start date should not overlap with end date of old bed

ADD UNIT +

ADD UNIT X

Start Date 07/18/2022

End Date

Eligibility Override

Available Units Unit 101 (St. Anthony (PSH), Building 1)

ADD CANCEL

Exits

Exiting Client from Bed

- Exits should occur when a client is no longer staying at the shelter
- Exiting from a program will automatically exit the client from their bed
- Exiting a client will immediately return a bed to *Available* status

The screenshot displays a user interface for a client named Brad Jones. The top navigation bar includes links for PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. The current view is for the PROGRAM: JEFFERSON HOTEL - GF. Below this, there are tabs for Enrollment, History, Assessments, Notes, Files, Units, and Forms. A red box highlights the '× Exit' button in the History tab. Below the tabs is a section titled 'Program Service History' which contains a table with columns for Start Date and End Date. A red box highlights the '08/03/2022' date in the End Date column of the first row.

	Start Date	End Date
Jefferson Hotel, Jefferson Hotel	08/03/2022	08/03/2022
105 Jefferson Hotel, Jefferson Hotel	07/11/2022	07/12/2022

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

Exit Reason and Denial of Service

- Exit Reason of “**Rule Violation**” indicates a Denial of Service (DoS)
- Indicate the rule violation that caused the DoS & the effective start/end dates
- Exit Destination must also be entered. Often, it is “No exit interview completed” but can be other destinations.

Program Exit Date	06/26/2024	
Exit Reason	Rule Violation	
Denial of Service	1e Disruptive behavior that is ongoing, uncontrollable, and presents a cle 	
Effective Date of Denial of Service	06/26/2024	
Date of Denial of Service Expiration	09/26/2024	

Bed Status

Bed Status/Availability

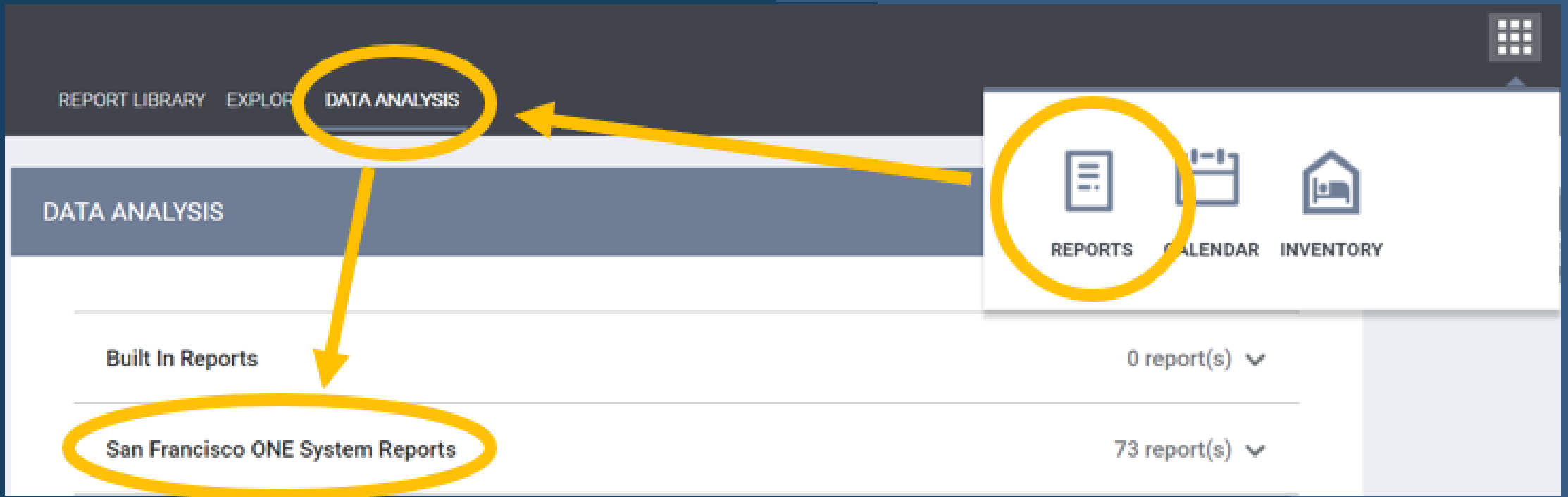
- A bed's status can be changed from the dashboard
- Provides the ability to reflect a bed's status in real-time

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

Reports

Inventory Reports

- Located under the *Data Analysis Tab*



Inventory Reports

- All reports under ***Inventory – Temporary Shelter**
 - Bed/Unit Roster
 - Client Roster

*Inventory - Temporary Shelter	
Temporary Shelter - Bed Assignments and Statuses	⌂ RUN
Temporary Shelter - Bed/Unit Roster	⌂ RUN
Temporary Shelter - Client Roster	⌂ RUN

Bed/Unit Roster

- Roster organized by bed/unit number
- All beds/units in your site with associated client (or no client)

Units by Status											
	Building	Bed/Unit Name	Unit Configuration	Current Availability	Description	Offline Reason	Offline Description	Head of Household	Unique Identifier	ONE Profile Link	Occupancy Start Date
1	MSC South	Bed 001 (SF311)	Adult - Single Bed - Upper bunk	Occupied	∅						2024-08-06
2	MSC South	Bed 002 (CAAP)	Adult - Single Bed - Upper bunk	Occupied	∅						2024-08-06
3	MSC South	Bed 003 (CAAP)	Adult - Single Bed - Upper bunk	Occupied	∅						2024-08-20
4	MSC South	Bed 004 (CAAP)	Adult - Single Bed - Upper bunk	Available	∅			∅	∅	∅	∅
5	MSC South	Bed 005 (SF311)	Adult - Single Bed - Upper bunk	Occupied	∅						2024-08-06

Client Roster

- Roster organized by client name
- All clients at your site with client information and associated bed

	Client	Unique Identifier	Date of Birth	Link to ONE system profile	Program	Program Start Date	Unit Assignment	Occupancy Start Date
1	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED] ...	MSC South Shelter - ESG	2024-08-13	Bed 012	2024-08-14
2	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED] ...	MSC South Shelter - ESG	2024-07-30	Bed 207 (CAAP)	2024-08-16
3	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED] ...	MSC South Shelter - ESG	2024-03-13	Bed 359 (SF311)	2024-08-07
4	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED] ...	MSC South Shelter - ESG	2024-07-23	Bed 124 (SF311)	2024-08-07
5	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED] ...	MSC South Shelter - ESG	2024-07-17	∅	∅

Next steps & Support

Next Steps



Ensure that all your available beds are correct by Friday (September 6th)



Go live with new workflow on Monday (September 9th)



Referrals will be made directly to available units/beds

What if I Need Support?

- **One-on-Ones**
 - Reach out to your ONE System Team contact (Swati, Vaishali, or Mark)
- **Documentation** available at: <https://onesf.bitfocus.com/temporary-shelter>
 - Tip Sheets (Desk Guide)
 - Training slides and videos
- Contact onesf@bitfocus.com for ongoing questions and unit updates

Questions?

