INVENTORY

Navigation Centers

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Goals for today

- By the end of this session, we'll have a shared understanding of:
  - Why we are launching Inventory
  - What Inventory will and won't do
  - How the new functionality will appear in your day-to-day work
  - Changes to your current workflow

    (spoiler alert: they're small… but will have a big impact!)
  - What to expect around the timeline and transition
  - How to get help if you have questions

Technical Agenda

- Overview of Inventory
- Accepting Referrals/ Enrollment
- Bed/Room Assignment
- Transfers
- Exits
- Reports
- Refresher Items

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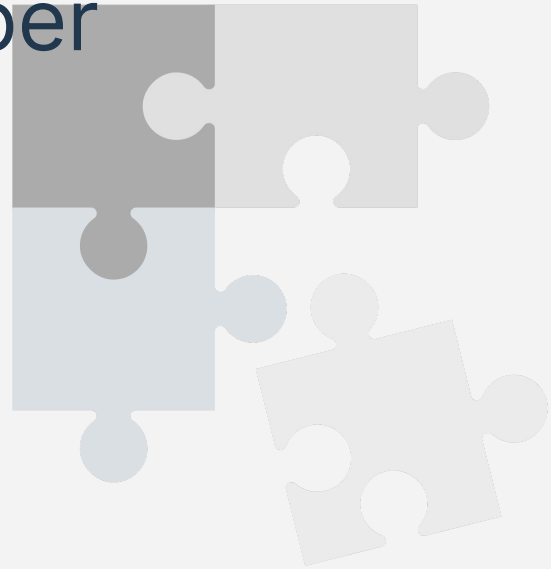
What’s happened so far and what’s next?

- You helped us to collect information about all of your beds
- Pilot with the Bayview in December
- Full roll-out of all sites in January



What Inventory *Is*

- A new set of tools built into the ONE System
- A way to more precisely track and view open beds
- Information that will help better match clients to the beds that best fit their needs

What Inventory Isn’t

- A new platform
- A complete overhaul of the ONE System
- A new approach to the Homelessness Response System or Coordinated Entry

What Inventory Will Do

- Help streamline workflows and better serve clients
- Provide better information to HSH and the community about which beds are unoccupied and why
- Support reconciliation and communication by being a reliable source of truth
- Provide more transparency into the overall portfolio

WHAT IS INVENTORY?

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Clarity Inventory

	Current: Program Level		New: Inventory
Tracking rooms & beds	Store counts of bed and units per program	→	Dynamic tracking of sites, buildings, and units
Eligibility	Setup at the program or funding source level	→	Setup at any level of Inventory
Referrals	Refer to a program	→	Refer directly to a specific room or bed
HUD Compliance	HUD compliant	→	HUD compliant

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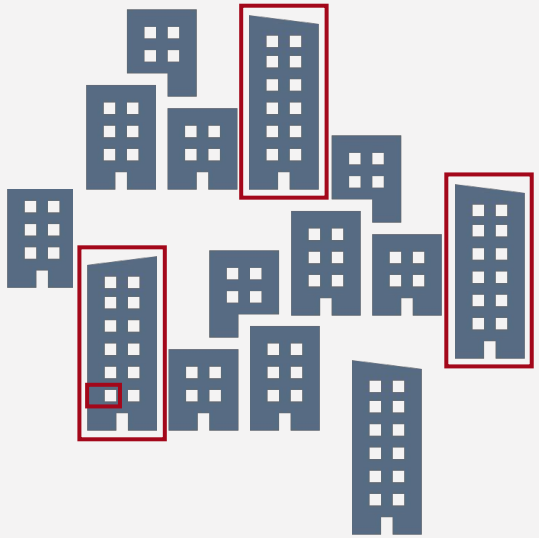
The Basics of Clarity Inventory

The **housing inventory site** is the location of one or more buildings where an **agency** has inventory

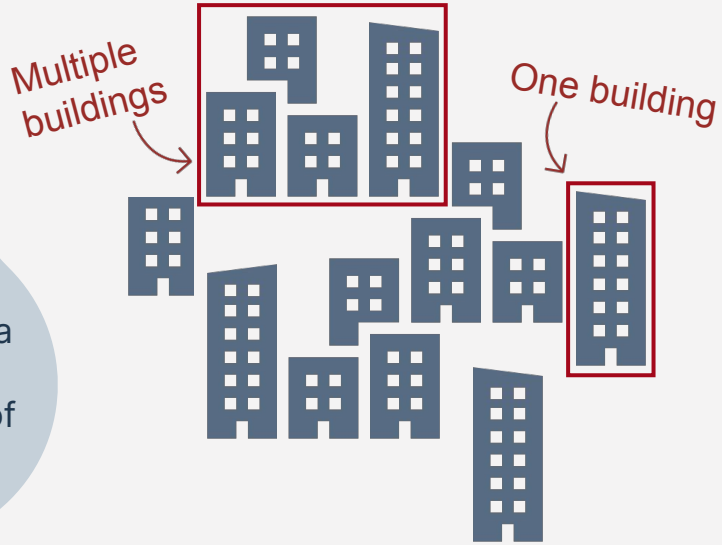


Unit configuration types are templates for each **type of bed** within a **building**

Agency

The **agency** is the umbrella that holds all components of Inventory

Sites



Buildings

A **building** is each individual building within the **site** (even if only one bed in the building applies to the inventory)

Unit Configuration Types

Beds

A **bed** is a blank slate until a **configuration type** is applied

DASHBOARD

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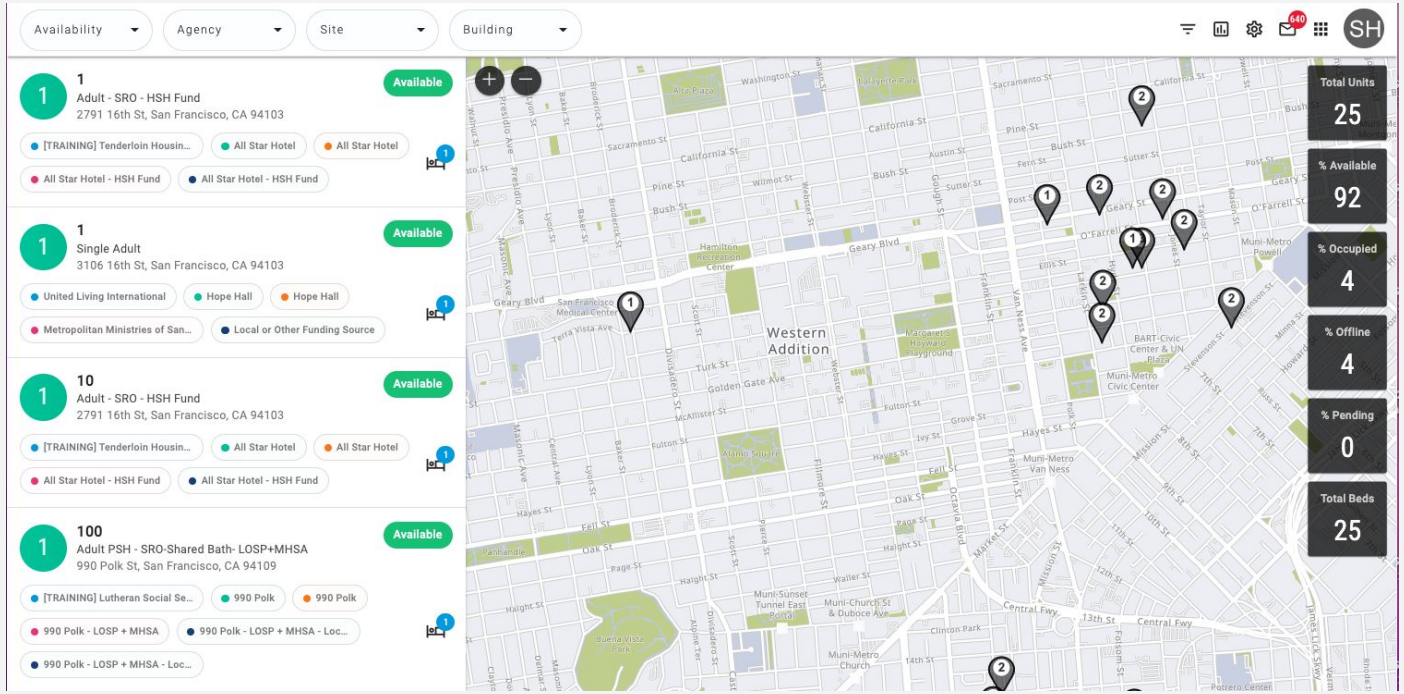
Inventory Module Dashboard

- Robust tool that includes a map view of bed/room details and locations
- Filters can be used to control what information is viewed



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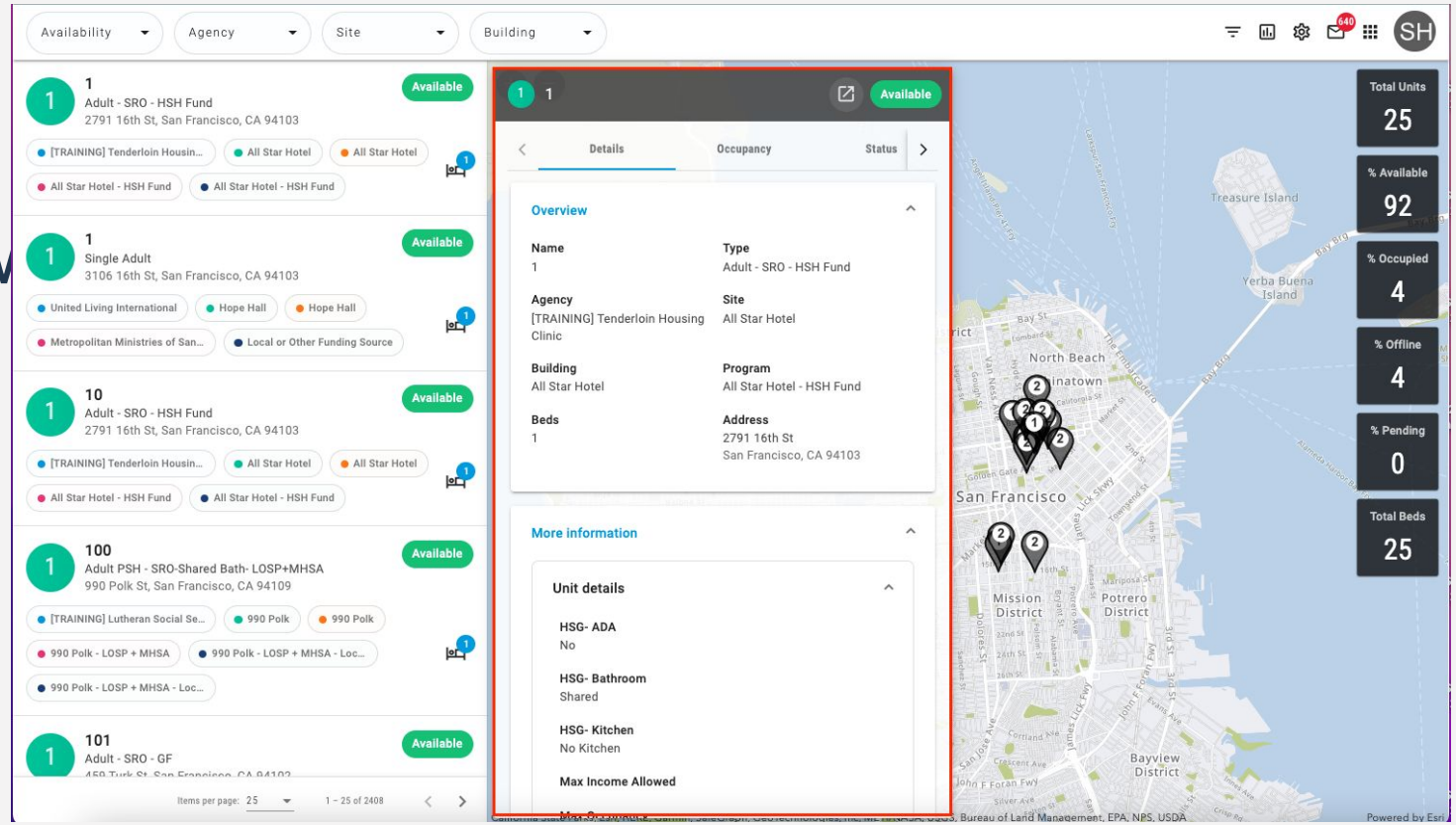
Inventory Module Dashboard

- Display cards show detailed bed-level information



NAVIGATION CENTER WORKFLOW

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Navigation Center Workflow

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PROCESSING REFERRALS

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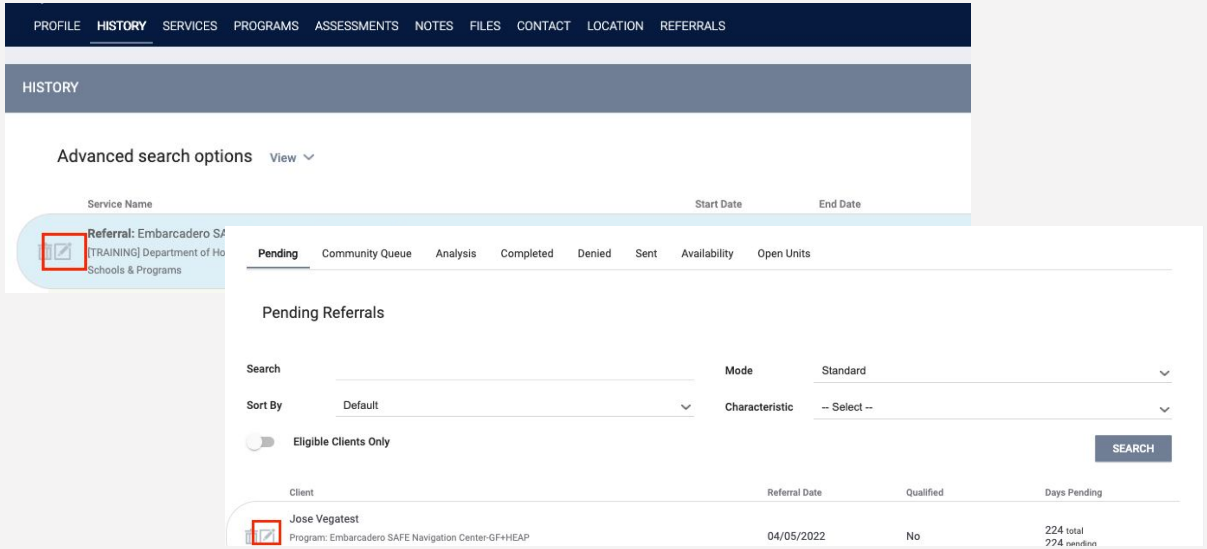
Referrals Notes

- Check the referral note for bed/room details
- Found in the referral
  - Access from the History or Pending Tabs



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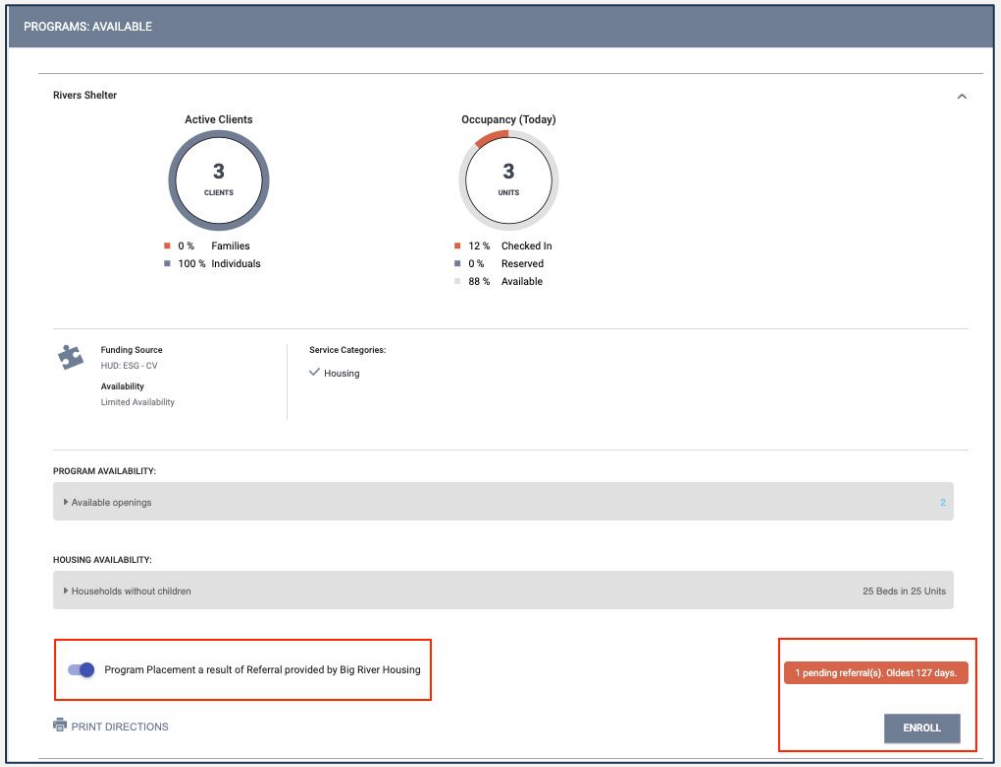
Accepting Referrals



- Enrolling the client into the program, will also completes the referral
  - The "Program Placement a result of..." toggle must be enabled
  - The orange pending referral box signifies the correct program
- Complete enrollments by end of shift

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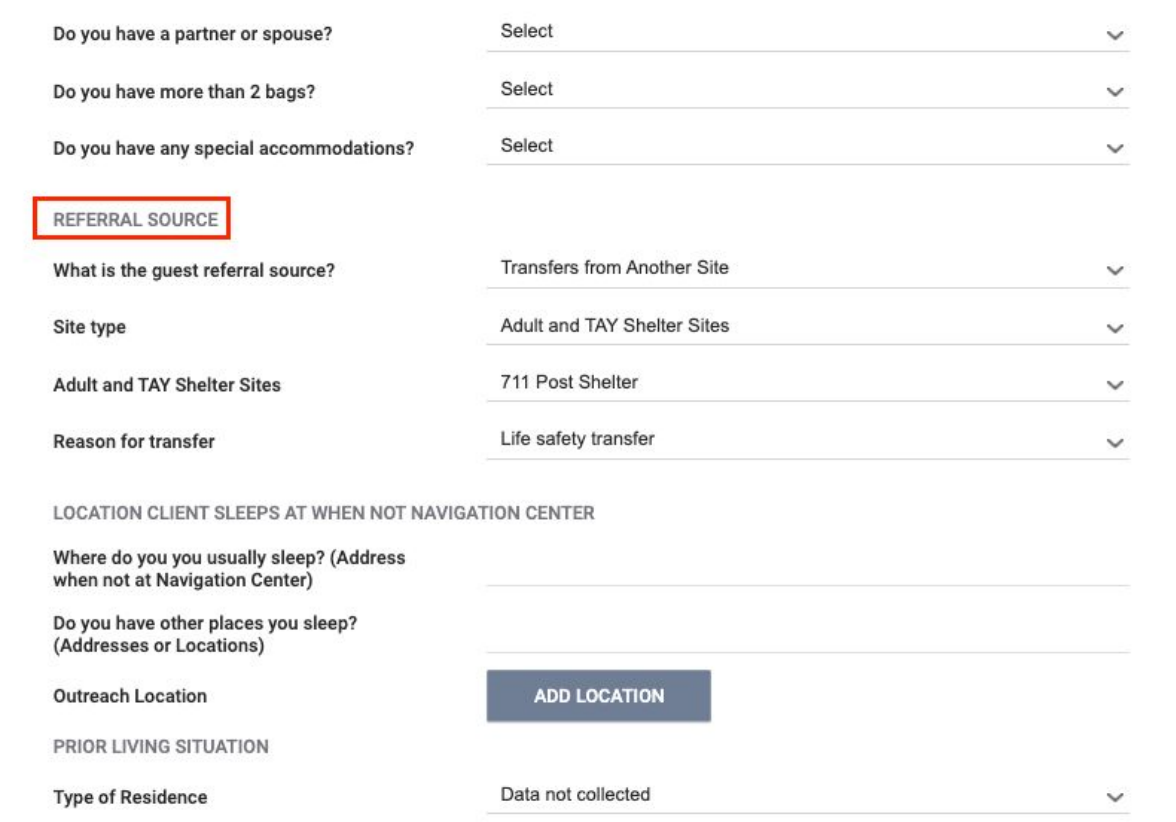
Enrollment



- *New* Referral Source section
- Collect as much information as possible
- Avoid using “Client Refused” or “Data not Collected” whenever possible

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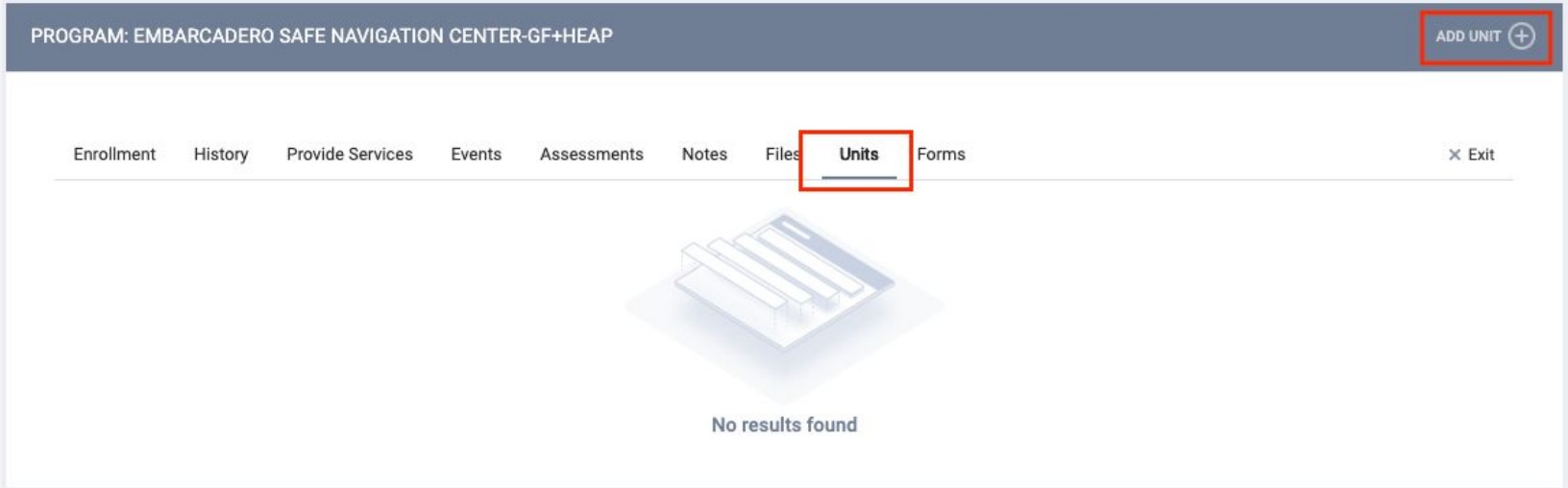
Bed/Room Assignment

- Assign the client to the bed/room listed in the referral note
- Complete under the *Unit Tab* after the client is enrolled



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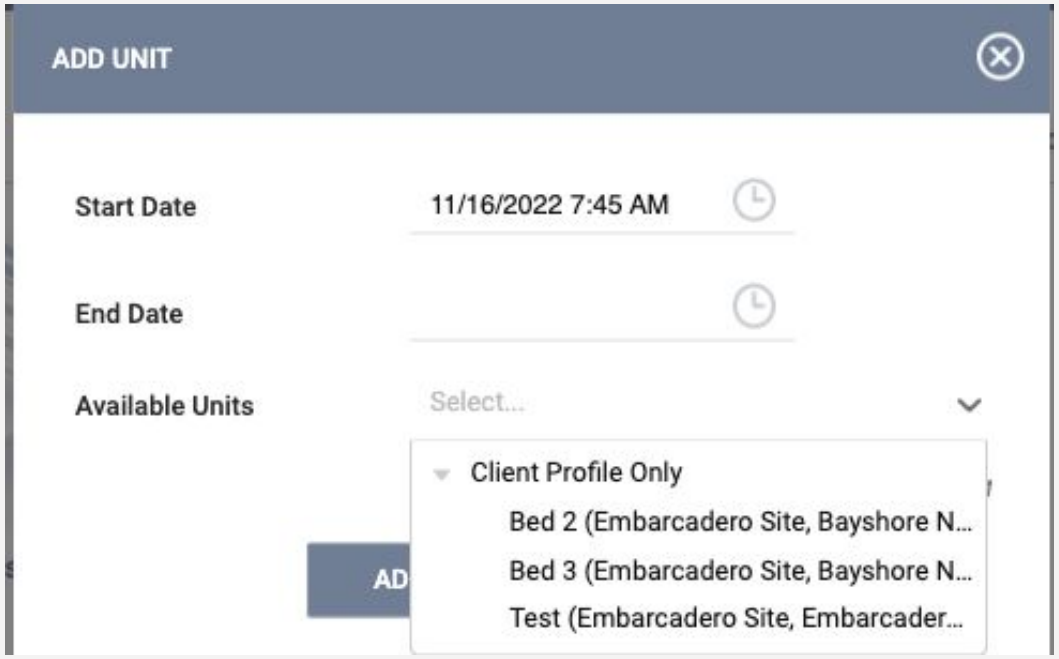
Bed/Room Assignment

- Add Start Date
- Leave End Date blank
- Click *Available Units*
  - Click *Client Profile* and select the unit the client was referred to



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Enrollment Sidebar

- Once the client is assigned to a unit, the unit number is visible in the enrollment sidebar

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TRANSFERRING BEDS/ROOMS

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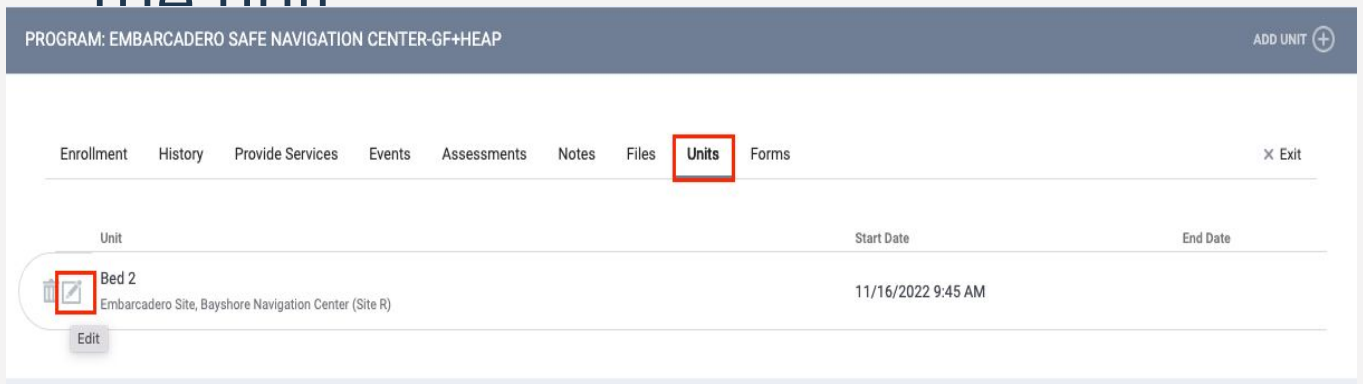
Transferring Beds/Rooms

- Staff can move clients to a different room/bed
- Completed under the *Unit Tab*
- Add an end date to the current unit
- End date for the current bed should be the last night the client slept in the unit



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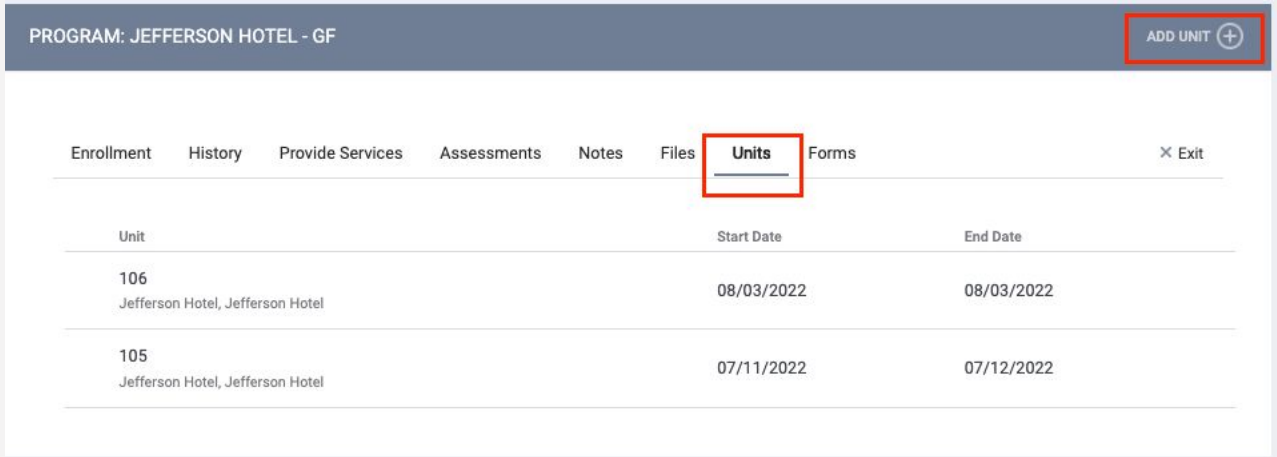
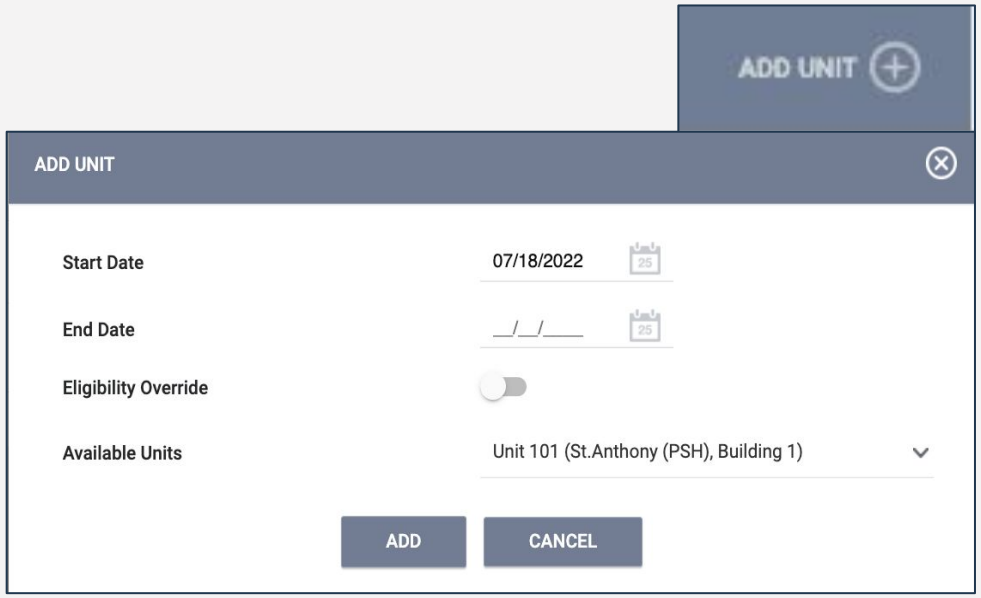
Transferring Beds/Rooms

- Start date for the new bed should be the first night the client will sleep in the bed





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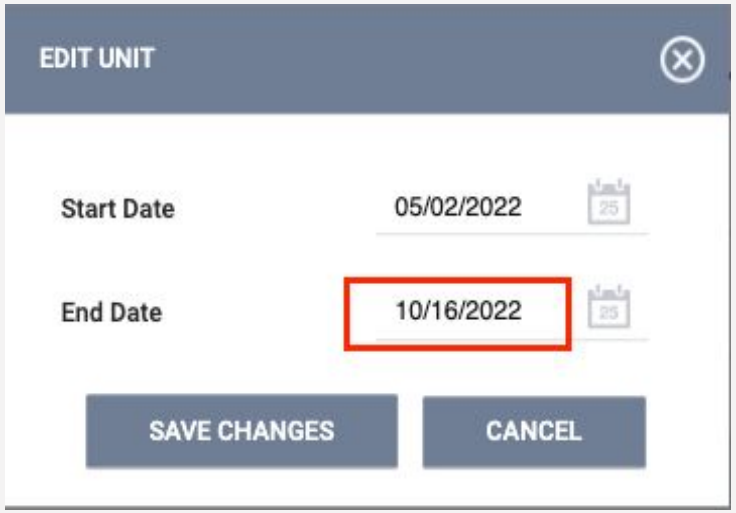
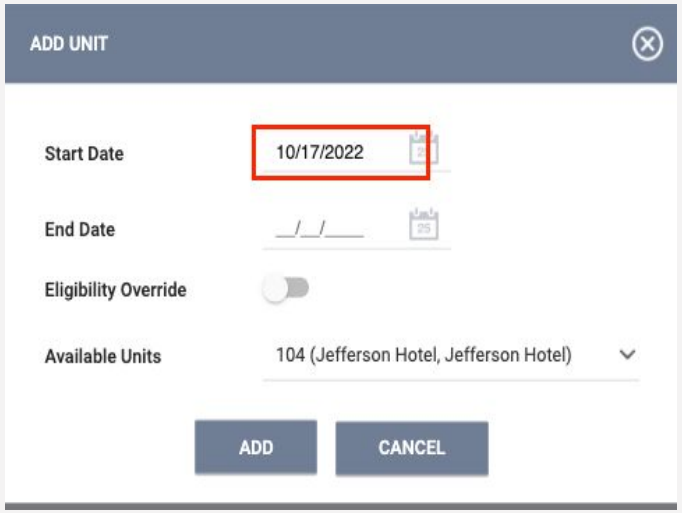
Transferring Beds/Rooms

- The start and end dates should not overlap

End Date for Current Unit



Start Date for New Unit



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EXITS

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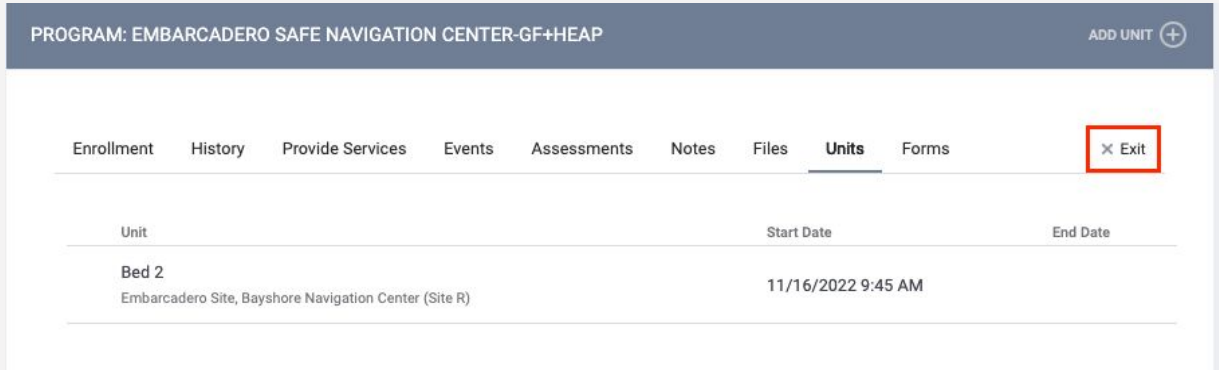
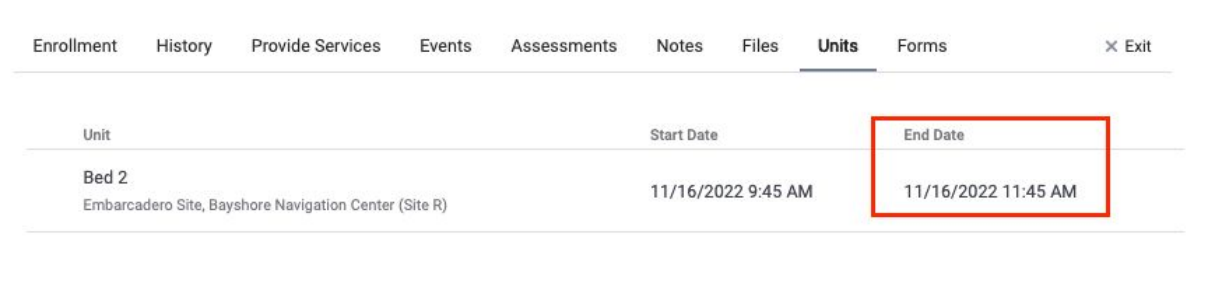
Exiting Client from Unit

- Exits when the client is no longer receiving services
- Exits will automatically add an end date to the bed/room
- Complete an exit for all household members





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REPORTS

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Report Library

- Utilize the *Report Library* to pull program or agency information
  - Referral data
  - Services
  - Program information
  - Data Quality
  - And more!

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Program Roster

- Program stay information for selected programs
- Now includes bed (unit) assignment

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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Referral Statistics-Inbound

- Under Community & Referrals
- Provides counts of referrals broken out by statuses

Referral Statistics - Inbound

[TRAINING] Five Keys Charter Schools & Programs

Date Range: 01/01/2021 thru 11/29/2022

A direct referral is when a client is referred directly to a program regardless of eligibility criteria. Direct referrals are made from the eligibility determination screen of the client's referral tab or from the referrals tab without going to the eligibility screen. Community Queue Referrals are broken down into two columns - Program (reassigned to a program from the Community Queue) and Unit (reassigned to a unit through Unit Queue functionality).

	Direct	CQ Program	CQ Unit	Total
Number of Agency referrals received	15	2	1	18
Pending Referrals				
Number of pending referrals	4	0	0	4
Oldest pending referral in days	238	0	0	238
Newest pending referral in days	6	0	0	6
Average pending referral in days	107	0	0	107
Pending - In Process Referrals				
Number of pending in process referrals	1	0	0	1
Oldest pending in process referral in days	127	0	0	127
Newest pending in process referral in days	127	0	0	127
Average pending in process referral in days	127	0	0	127

Program Name	P	P / I	A	D	E
Baldwin Navigation Center	0	0	2	0	0
Bayshore Navigation Center (Site R)	1	0	2	0	0
Embarcadero SAFE Navigation Center-GF+HEAP (Site H)	2	1	5	0	1
Falls Navigation Center	1	0	0	0	0

PH - Housing with Services (no disability required for entry)

Agency Name	Program Name	P	P / I	A	D	E
[TRAINING] Five Keys Charter Schools & Programs	Artmar Hotel - GF	0	0	0	0	1

PH - Rapid Re-Housing

Agency Name	Program Name	P	P / I	A	D	E
[TRAINING] Five Keys Charter Schools & Programs	Five Keys - Rapid Rehousing - Prop C	0	0	1	0	0
[TRAINING] Five Keys Charter Schools & Programs	Rising Up-Five Keys Schools and Programs	0	0	1	0	0

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Service Summary

- Under Service-Based Reports
- Provides the total number of clients who received a service

Service Summary

[TRAINING] Providence Foundation

Date Range: 08/01/2022 thru 11/29/2022

Referral to Outside Resource	Unique Clients	# of Services	# of Service Days
Birth Certificate	1	1	1
Clothing Services	1	1	1

Tue Nov 29 02:05:00 PM 2022

1 / 1

Powered By CLARITY HUMAN SERVICES

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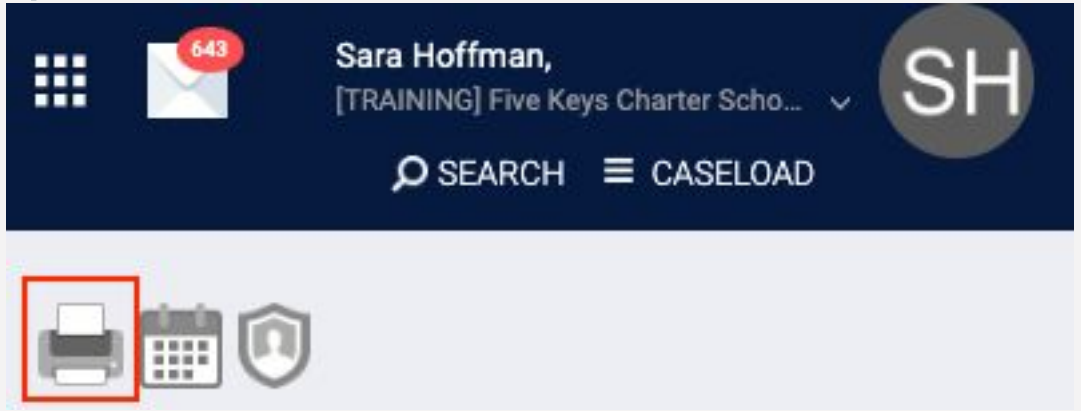
Client Reports

- Utilize *Client Reports* to pull information pertaining to a specific client
- Found under the printer icon



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Homeless Status Timeline

- Provides a graphical representation of client's timeline of enrollments
  - Indicates homelessness or housed status

Client Timeline Enrollments

[TRAINING] Five Keys Charter Schools & Programs
Report period 01/01/2021 - 11/29/2022
Client Name: Ruby Test
Unique ID: 54C559D2A

	2022											2021											
	11	10	9	8	7	6	5	4	3	2	1	12	11	10	9	8	7	6	5	4	3	2	1
SUMMARY - Homeless Status (per HUD definition)	Y	Y	Y	Y	?	?	?	?	?	?	?	?	?	?	?	?	?	?	?	?	?	?	?
[[TRAINING] Providence Foundation]Central Waterfront Navigation Center																							
[[TRAINING] San Francisco Adult Coordinated Entry Agency (ACE)]Access Partner- Psychiatric Emergency Services																							
[[TRAINING] Tenderloin Housing Clinic (THC)]Jefferson Hotel - GF																							

Color Explanation	
Emergency Shelter/Safe Haven/Street Outreach	
Permanent Housing Enrollment with Move-in Date	
Permanent Housing Enrollment without Move-in Date	
Transitional Housing Enrollment	
Other HMIS Enrollment	
PH Move-in Date	MI
No required service or living situation status to confirm..	NS
Service placed outside of enrollment	S

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REFRESHER ITEMS

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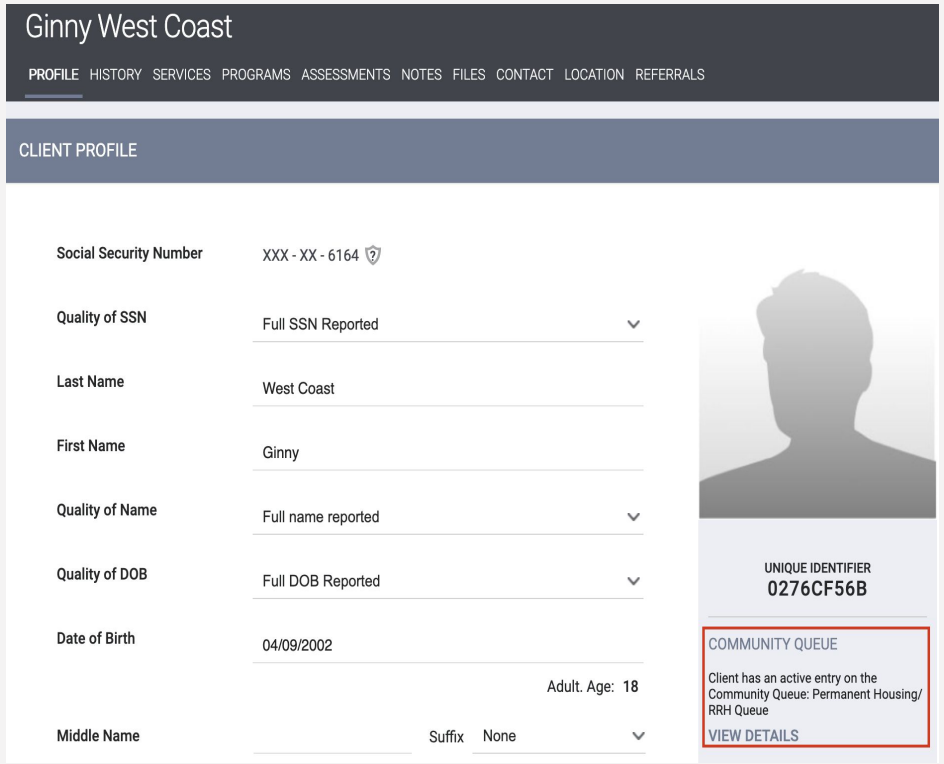
Housing Referral Status

- Can be viewed on the profile page
- Look under the *Unique ID* to view Housing Referral Status



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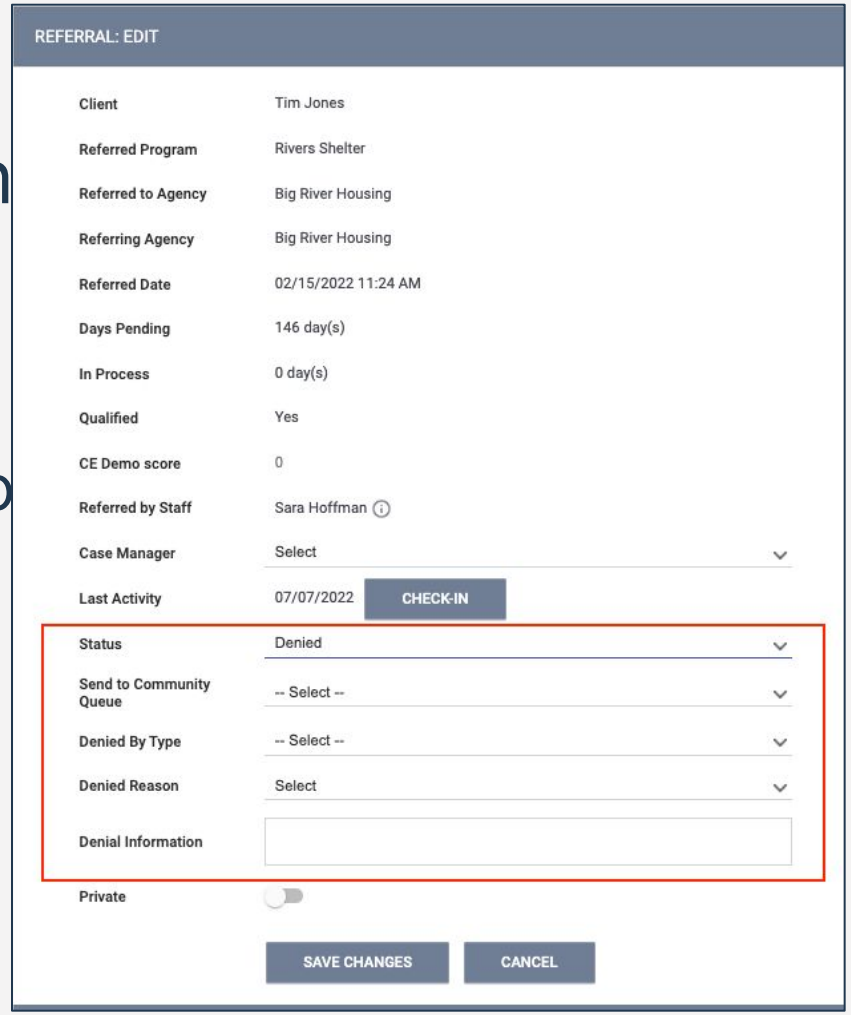
Denying a Referral

Do not contact the help desk to delete the referral

- If a client refuses shelter or n
shows, staff will:
  - Status= Denied
  - Send to Community Queue= No
  - Select denial type
  - Provide additional details



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Next steps

- Confirm appropriate staff can access new features in ONE
- By January 20th:
  - Assign all clients to their current bed in ONE
  - Notify Patrick of any unavailable beds (patrick.buckalew@sfgov.org)

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Support

- Contact the Help Desk with any questions
  - onesf@bitfocus.com
  - (415) 429-4211

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Questions?

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