

# ONE System Navigation Center Workflow Toolkit

## New Inventory Features

January 2023

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## Context

The addition of Inventory in the ONE System allows for more precise tracking of beds for Navigation Centers. For the time being, the only changes to the referral and bed management workflow are those identified below. All other activities in ONE remain the same. Currently, only Navigation Centers are adopting Inventory, but it will be implemented across other temporary shelters in the future. As you use this guide, please note that in the context of Navigation Centers, “units” are the system equivalent of “beds” in the ONE System interface.

## What Inventory Will Do

Inventory in ONE is:

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

Inventory is not:

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

Using Inventory in ONE will help with the following:

- Help streamline workflows and better serve clients;
- Provide better and more timely information to HSH and the community about which beds are unoccupied, for how long, and why;
- Support reconciliation and communication by being a reliable source of truth; and
- Provide more transparency into the overall Navigation Center portfolio.



## Accept and Enroll Client in Program



Enroll a client the day that they arrive on site. If they do not arrive, deny the referral the next morning.



Pay attention to following appropriate steps for households.

### Overview

Select the appropriate client and navigate to the **Programs** tab. Select the correct program under **Programs: Available**. Ensure that the “Program Placement a Result of Referral” toggle is ON. If this toggle is not on, please contact the Guest Placement team. Enroll the client.

### Step by Step

1. Open the client 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 client record by clicking on the client’s name from the **Pending** tab in **Referrals**.

The screenshot displays the 'REFERRALS' interface. The 'Pending' tab is active, showing a list of 'Pending Referrals'. One entry, 'Client Test', is highlighted with a green box. An arrow points from this entry to the 'PROGRAMS' tab in the client profile header, which is also highlighted in a green box. Another arrow points from the 'PROGRAMS' tab to the 'PROGRAMS: AVAILABLE' list, where the 'Navigation Test' program is highlighted in a green box.



- 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. If it is not selected, please contact the Guest Placement team to ensure proper referral.

The screenshot shows the 'Client Test' interface with a dark blue header containing navigation tabs: PROFILE, HISTORY, SERVICES, PROGRAMS, NOTES, ASSESSMENTS, FILES, CONTACT, LOCATION, and REFERRALS. Below the header, the 'Referrals (90 Days)' section features a circular gauge with the number '1' and the word 'REFERRAL' inside. A legend below the gauge indicates: 100% Referrals Pending (orange square), 0% Referrals Connect (blue square), and 0% Referrals Denied (grey square). Further down, the 'Funding Source' is set to 'Local or Other Funding Source' and 'Availability' is 'Full Availability'. A toggle switch [2] for 'Program Placement a result of Referral provided by [TRAINING] System' is turned ON. To its right, a red box [1] displays '1 pending referral(s), Oldest 0 days'. Under 'Include group members:', the 'Partner Test' toggle [3] is turned OFF. At the bottom, there is a 'PRINT DIRECTIONS' link and an 'ENROLL' button [4].

- Be sure to enroll each household member separately. This will allow them to correctly be assigned to their individual beds. The toggle for **Include group members** should be turned OFF [3].
- Complete the enrollment for the client by selecting the **Enroll** button [4]. Doing so will accept the referral and link it to the enrollment record.
- Complete the enrollment, answering all questions.



## Assign Client to a Bed

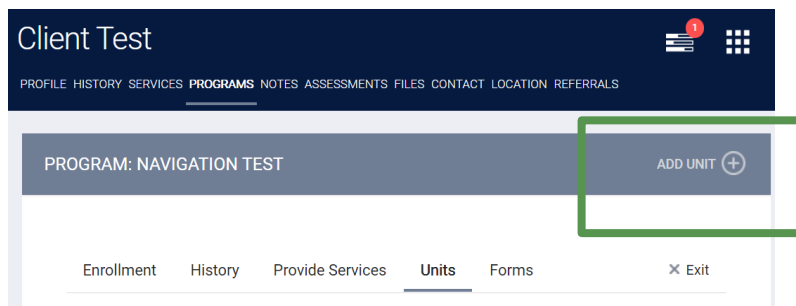


### Overview

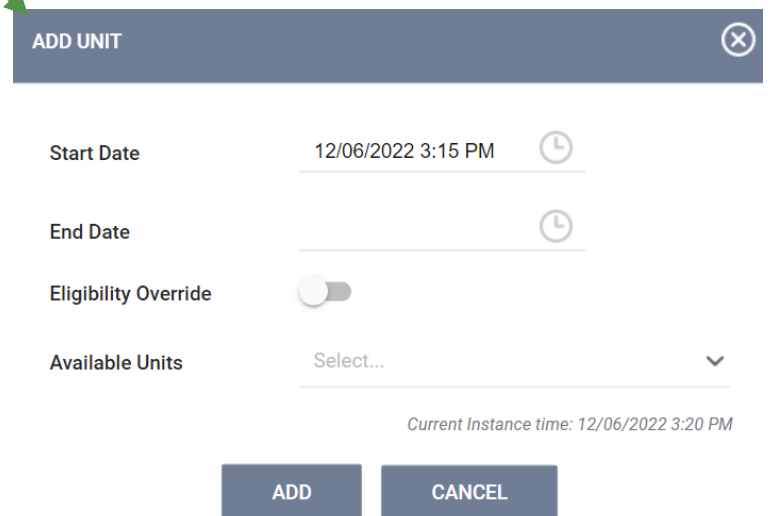
Under the program tab in the appropriate client, click ‘Add Unit’ on the right side of the screen. Select the start date, and leave the end date and eligibility override sections as is. Under ‘Available Units’ start by selecting the relevant Assessment, then the appropriate bed or unit from the available options. All enrolled clients should be associated with a bed or unit number.

### Step by Step

1. Under the **Program**, select the **Unit** tab.
2. Select the **Add Unit** option.



3. In the pop-up, fill in the start date. Under the **Available Units**, start by selecting the appropriate assessment to expand the bed or unit choices. Select the correct bed or unit, and confirm to assign the client into their new unit.
4. If an error message occurs when selecting **Available Units**, turn on the **Eligibility Override** toggle and try again.



## Exit Client From a Program



New automated functionality: Exiting a client from a program also exits them from their bed.



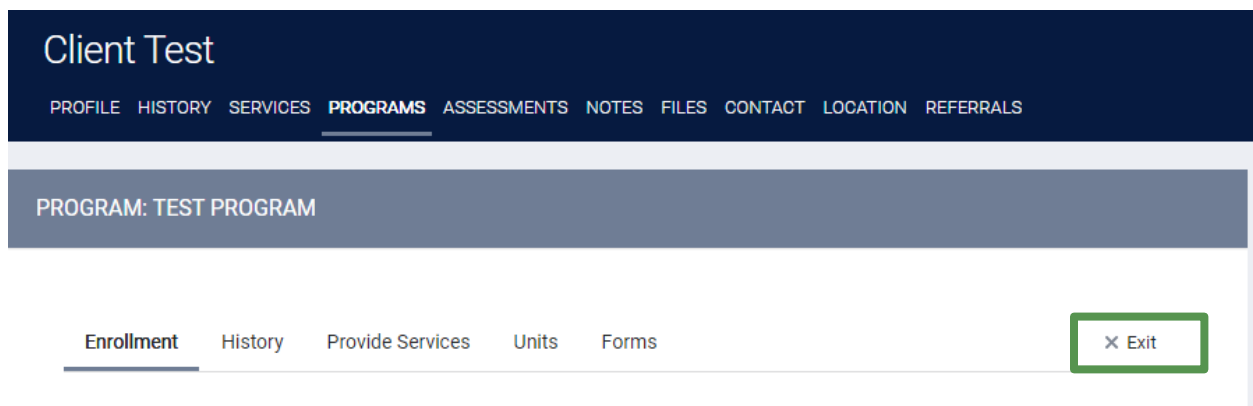
Update ONE before 8 am the day after a client exits.

### Overview

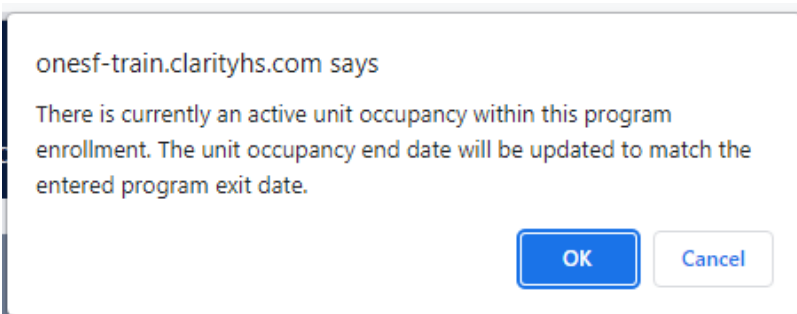
Exiting a client from the program will now also exit a client from their assigned bed or unit. Exit the client from the program by selecting the appropriate client, navigating to the program, and choosing 'Exit'.

### Step by Step

1. Open the client record by searching for the client, 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 client from the program, they will also be automatically exited from the bed or unit. Once the client assigned to that bed or unit is exited, the bed will be automatically updated to Available. Select OK to confirm that the unit will be marked available as of the program exit date:



## Transferring a Client to a New Bed

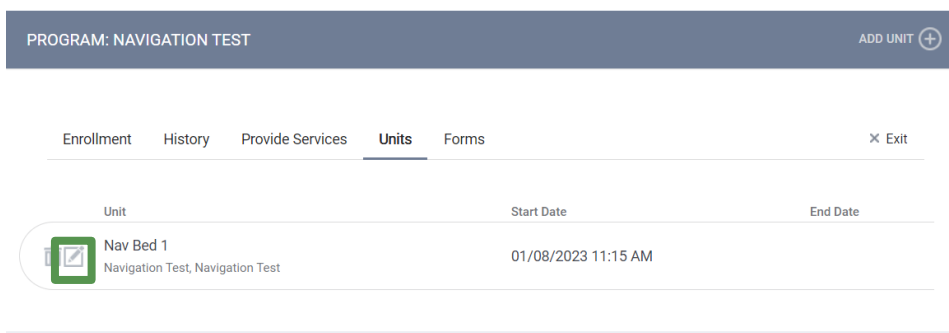


### Overview

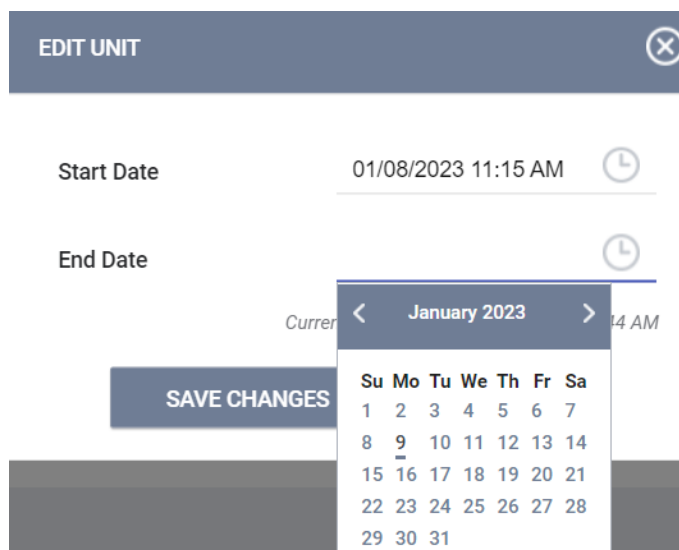
If a client needs to switch beds within a Navigation Center, begin by searching for the client. Open their profile, select Programs, then the appropriate program. From there, navigate to the unit tab under the program tab. Open the unit, and select the end date. Then assign the client to a new bed or room following the same process as a new move-in. Under the program tab in the appropriate client, click 'Add Unit' on the right side of the screen. Select the start date, and leave the end date empty. Under 'Available Units' start by selecting the relevant assessment, then the appropriate unit from the available options. If there is no available assessment, please contact the Bitfocus help desk ([onesf@bitfocus.com](mailto:onesf@bitfocus.com)).

### Step by Step

1. In cases when clients need to transfer units, either temporarily or permanently, changes can be made by clicking the pencil tool next to the unit number.



2. An end date should be selected, and then a new bed or unit should be assigned under the **Add Unit** tool.



3. Under the **Program**, select the **Unit** tab. Select the **Add Unit** option.
4. In the pop-up, fill in the start date. Under the **Available Units**, select the correct unit or bed, and confirm to assign the client into their new unit or bed.





## Review Roster Reports for Accuracy



New and updated reports are now available in ONE.



Check rosters weekly to ensure accuracy.

### Overview

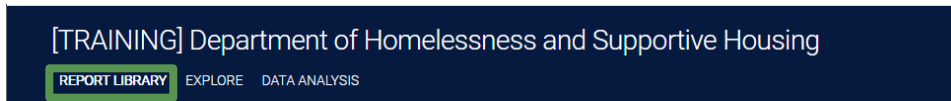
Review rosters weekly or more often to ensure that the information in ONE is accurate. To confirm that clients are associated with their current units or beds in ONE, review the **Program Roster Report**, which now includes the unit numbers associated with a client’s program enrollment. To confirm that beds or units are correctly identified as occupied, offline, or vacant, review the **Navigation Center Open Bed/Room Report**.

### Step by Step

There are two primary reports that will help with data quality: the Program Roster and the Building Roster.

#### 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.



Program Based Reports		19 report(s) ^
[EMPL-101] Employment Report	★   ⌂ RUN   📅 SCHEDULE   MORE INFO ▾	
[EMPL-102] Employment / Education Report	★   ⌂ RUN   📅 SCHEDULE   MORE INFO ▾	
[EXIT-101] Potential Exits	★   ⌂ RUN   📅 SCHEDULE   MORE INFO ▾	
[EXPS-103] Program Funding Source Financial Detail	★   ⌂ RUN   📅 SCHEDULE   MORE INFO ▾	
[GNRL-105] Program Participation Summary	★   ⌂ RUN   📅 SCHEDULE   MORE INFO ▾	
[GNRL-106] Program Roster	★   ⌂ RUN   📅 SCHEDULE   MORE INFO ▾	
[GNRL-220] Program Details Report [2022]	★   ⌂ RUN   📅 SCHEDULE   MORE INFO ▾	



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

The screenshot shows a 'REPORT LIBRARY' interface. The breadcrumb path is 'Program Based Reports > [GNRL-106] Program Roster'. The 'Program(s)' dropdown is set to 'Navigation Test'. The 'Status' is 'Active within Report Date Range'. 'HoHs Only?' is set to 'No'. The 'Report Date Range' is '01/09/2023' to '01/09/2023'. The 'Report Output Format' is 'Web Page'. A 'SUBMIT' button is at the bottom.

- d. Review the report for accuracy. Clients will either show as having a bed or unit number under the **Unit Assignment** column or n/a.

Program Roster Report													[TRAINING] Department of Homelessness and Supportive Housing (HSH)			
<p>Housing Move-in: Undefined = Unknown HoH or adjusted Move-in is Null, <input type="checkbox"/> = Non PH Project, A: Assessments, S: Services, CN: Case Notes                      You can find more information about adjusted Move-In Date at the <a href="#">Help Center Article</a></p> <p>Head of Household (HoH) Unique Identifiers are listed in bold text. Household members are grouped together with the HoH.</p>																
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	
<b>Program: Navigation Test</b>																
Test, Client	54AB3C97D	01/01/1980	43	43	01/08/2023	-	2		0	0	0	S. Edwards	Nav Bed 1	01/08/2023		
Test, Bitfocus	560656F23	01/01/1978	45	45	01/08/2023	-	2		0	0	0	S. Edwards	Nav Bed 3	01/08/2023		
Client, Test	F2830A985	01/01/1993	30	30	01/08/2023	-	2		0	0	0	S. Edwards	n/a	n/a	n/a	
Doe, Jane	D01CE8CF0	11/01/1994	28	28	01/08/2023	-	2		0	0	0	S. Edwards	Nav Bed 2	01/08/2023		
													Number of Enrollments: 4			
													Number of Unique Clients: 4			
													Number of Households: 4			
													Total Number of Enrollments: 4			
													Total Number of Unique Clients: 4			
													Total Number of Households: 4			
Note: * denotes Inactive Assigned Staff																
Program Name											Project Type					
Navigation Test											Emergency Shelter					
Mon Jan 9 11:38:58 AM 2023																
Powered By  1/1																

2. Open Bed/Room Report

- a. Under the waffle tool, select **Reports**. Click to the **Data Analysis** tab. It often takes longer to load than other pages in the ONE System.
- b. Select **San Francisco ONE System Reports** to expand the menu. Under **\*Inventory – Temporary Shelter**, select **Navigation Centers Open Bed/Room Report**.



DATA ANALYSIS

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**Built In Reports** 0 report(s) ▾

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**San Francisco ONE System Reports** 59 report(s) ▲

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**Home**

ONE System User Engagement ⊙ RUN

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**\*Inventory- Housing**

Building Roster ⊙ RUN

Housing Unit Availability Report ⊙ RUN

Inactive Units ⊙ RUN

Posted Program Openings for Reconciliation ⊙ RUN

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**\*Inventory- Temporary Shelter**

Navigation Centers Open Bed/Room Report ⊙ RUN

- c. The **Navigation Centers Open Bed/Room Report** demonstrates the number of available units for any chosen Agency, Building, etc. Filters can be used to view only units that meet a client’s needs, such as higher beds, lower beds, or bathroom needs.

Navigation Centers Open Bed/Room Report ⌕ ☰ ⋮

Agency Name  Building Name  Gender  Bariatric Beds  Lower Bed  Higher Bed  Accessible for Wheelchair  Bedside Outlet  Near a Bathroom

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### Active, Unoccupied Beds by Site

Agency Name and Building Name dashboard filters are not applied to this section of the dashboard

<p style="font-size: 24px; font-weight: bold;">180</p> <p style="font-size: small;">Available Baldwin Navigation Center Beds</p>	<p style="font-size: 24px; font-weight: bold;">128</p> <p style="font-size: small;">Available Bayshore Navigation Center Beds</p>	<p style="font-size: 24px; font-weight: bold;">101</p> <p style="font-size: small;">Available Bayview SAFE Navigation Center Beds</p>
<p style="font-size: 24px; font-weight: bold;">64</p> <p style="font-size: small;">Available Central Waterfront Navigation Center Beds</p>	<p style="font-size: 24px; font-weight: bold;">186</p> <p style="font-size: small;">Available Division Circle Navigation Center Beds</p>	<p style="font-size: 24px; font-weight: bold;">200</p> <p style="font-size: small;">Available Embarcadero SAFE Navigation Center Beds</p>

