ONE System Temporary Shelter Workflow Toolkit

April 2025

Contents

Context

Inventory in the ONE System allows for precise tracking of units, beds, and associated clients for Temporary Shelters. As you use this guide, please note that in the context of Temporary Shelter, “units” are the equivalent of “beds” in the ONE System interface.

What Inventory Does

Inventory in ONE is:

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

Using Inventory in ONE helps with the following:

- Streamlines workflows and better serves clients
- Provides more transparency into the overall 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 beds are unoccupied, for how long, and why

Monitor Incoming Referrals

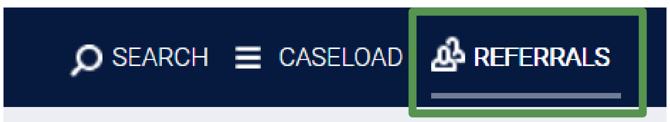
The Referrals tab displays incoming guest referrals. Email alerts can also be configured to alert you via email every time a referral is sent to your site.[1]

Overview

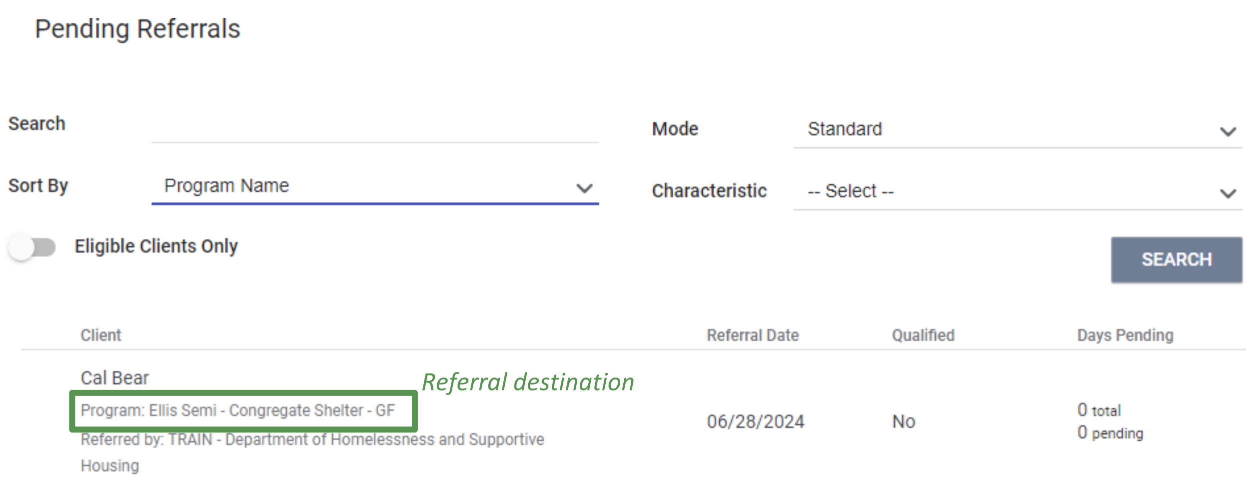
Use the **Referrals** tab to monitor incoming referrals to your shelter site. Only sites that receive referrals from Guest Placement will receive referrals in this tab. A client's profile can be accessed directly from the Referral tab and enrolled to a program.

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 the guest name. Please note that for non-congregate sites receiving a couple, 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 different sites. You can use the *Sort By* filter to group referrals by site or use the *Search* bar to search for a client name.

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

[1] If you would like email alerts configured, please reach out to onesf@bitfocus.com.

Accept and Enroll Clients in Program

Enroll clients the day that they arrive on site. 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.

Overview

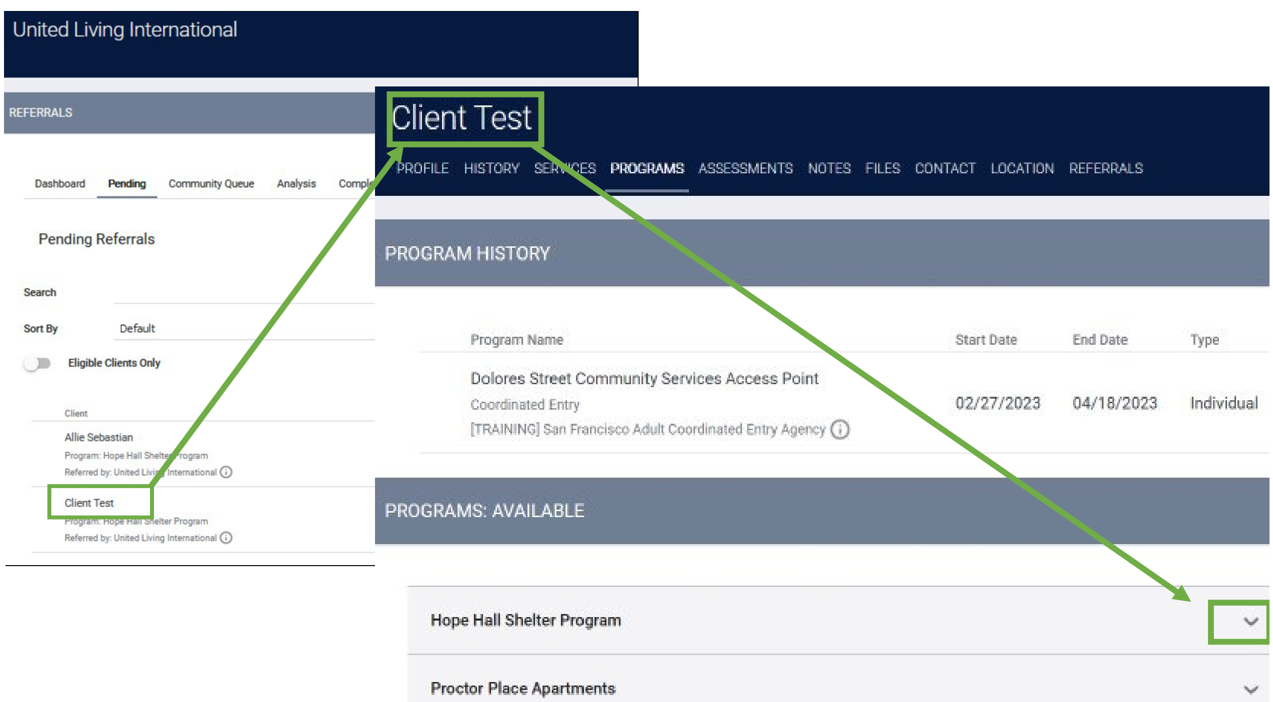
Enroll clients in the program as soon as possible when they arrive. Navigate to the client profile and the **Programs** tab in their record. Select the correct program under **Programs: Available**. Ensure that the “Program Placement a Result of Referral” toggle is ON. *If this toggle is not on, please contact the Guest Placement team*. Enroll the client.

Please note that couples at non-congregate sites have special considerations when completing enrollments. Look for the corresponding icons below to ensure proper enrollment. These steps only apply to non-congregate sites! Congregate and semi-congregate sites should enroll couples individually to their own bed.

Step by Step

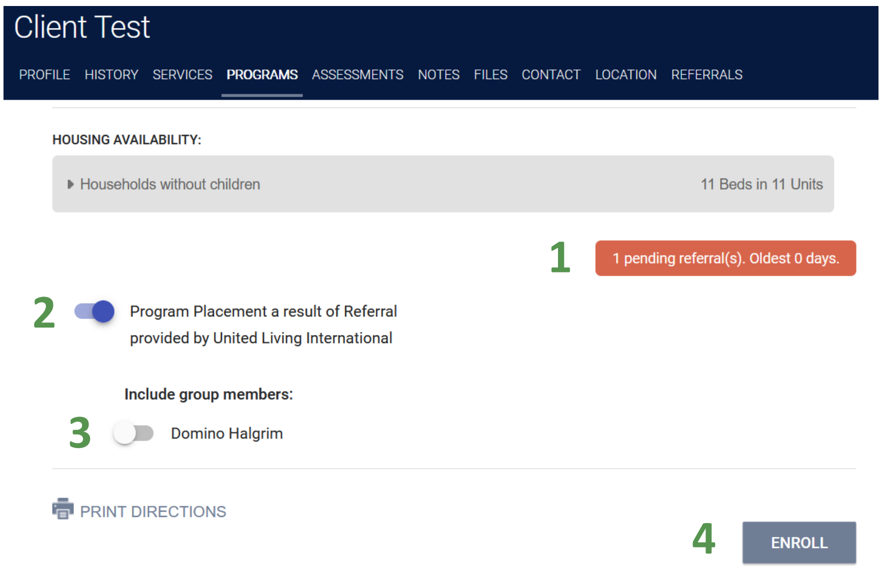
1. Open the client profile and click into programs. Under **Programs: Available**, click on the appropriate program to expand. You can access the referral record here by clicking on the pencil icon next to the referral record in the list.

You can also access the client record by clicking on the client’s name from the **Pending** tab in **Referrals**.

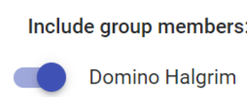


2. There should be an orange box [1] identifying that there is a pending referral to this program. Ensure the toggle that says 'Program Placement is a result of Referral' [2] is ON. *If it is not selected, please contact the Guest Placement team to ensure proper referral.*

   For enrollments at **congregate and semi-congregate sites**: 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].



   For couples at **non-congregate sites**, ensure the toggle for **Include group members** is turned **ON** [3] for any group member who is 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, answering all questions.

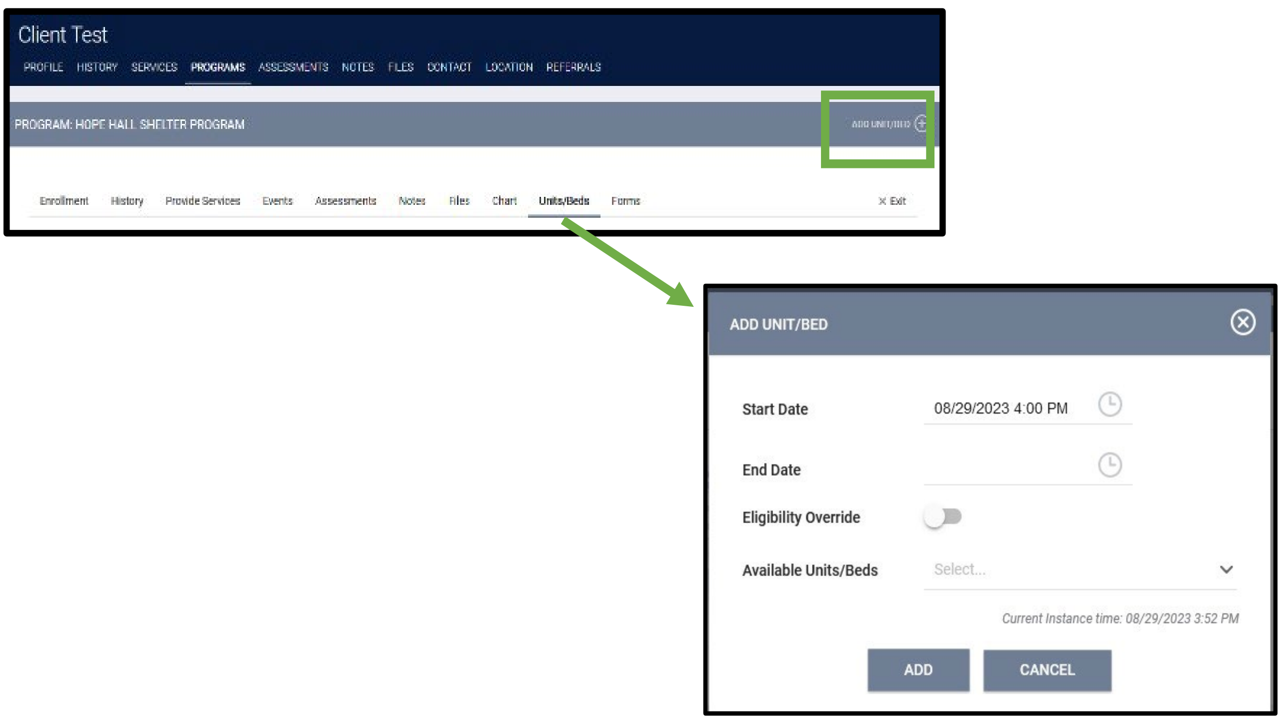
Assign Client to a Bed – *Self-Enrollment Sites ONLY*

<u>Overview</u>

If a referral to your site does not come with a bed already assigned, you will need to assign a bed once *after* you've enrolled the client (see previous step). Please note: as of May 2025, this <u>only</u> applies to Dolores Shelter and Kinney Hotel Stabilization Rooms.

<u>Step by Step</u>

1. Under the **Program**, select the **Unit** tab.



2. Select the **Add Unit** option.
3. In the pop-up, fill in the start date. This is the first night the client is sleeping in the bed. Under **Available Units/Beds,** select Client Profile only to expand the choices. Select the correct bed, and confirm to assign the client into their new bed.
4. If an error message occurs when selecting **Available Units/Beds**, turn on the **Eligibility Override** toggle and try again.

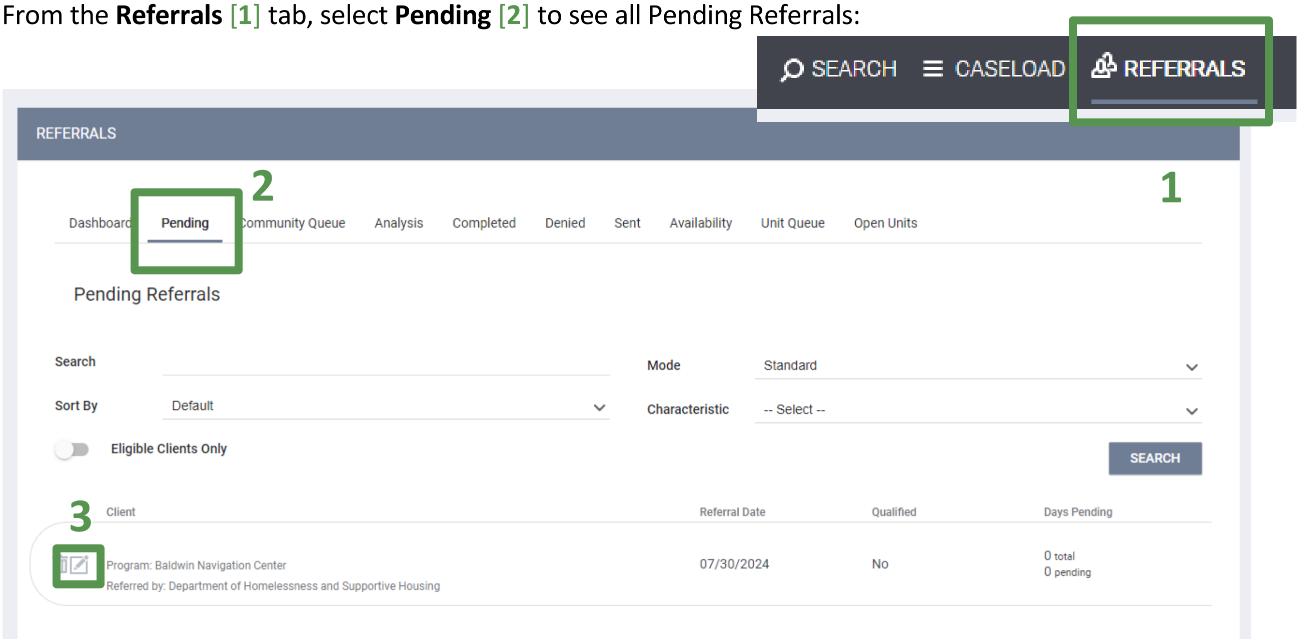
Deny a Referral

<u>Overview</u>

If a client refuses placement or does not show up for their reservation, 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 guest to the bed.

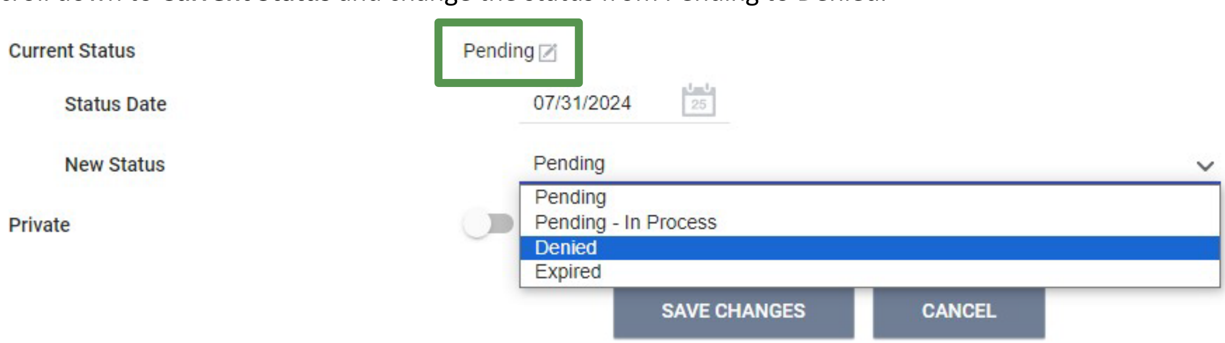
<u>Step by Step</u>

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



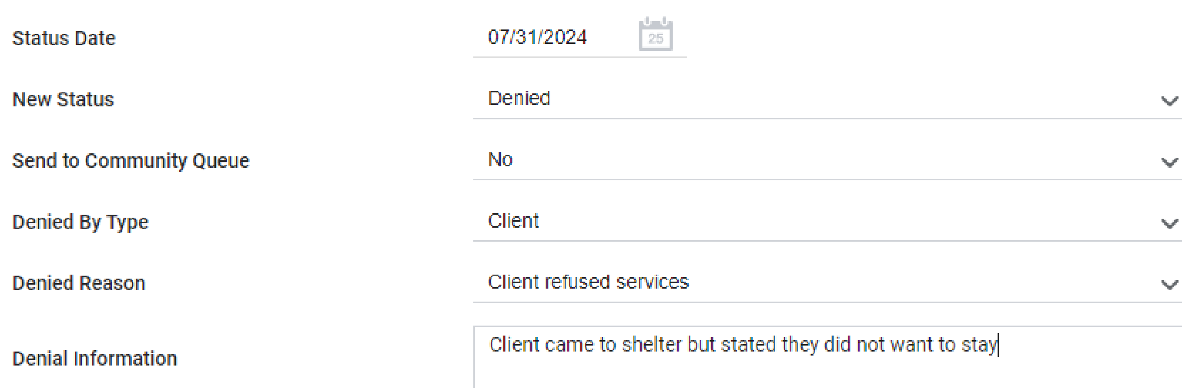
Search for the client and select the edit button [3] next to the referral that needs to be denied.

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. It is very important you fill these out with accurate information:

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.

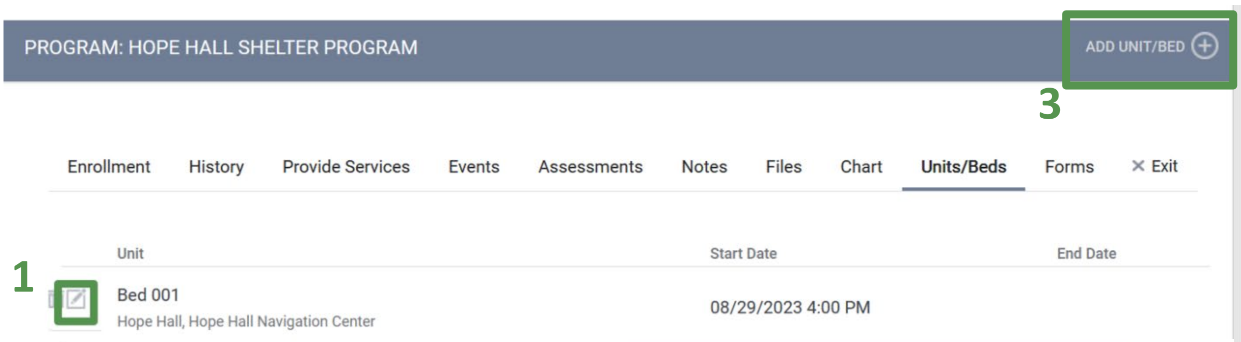
Transferring a Client to a New Bed

Overview

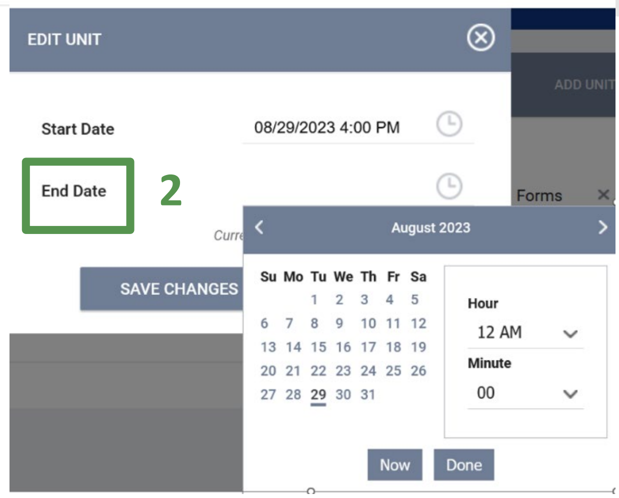
When a client needs to switch beds, begin by searching for the client. Open their profile, select **Programs** from the menu and select the appropriate program. Navigate to the **Units/Beds** tab under the Program tab. After adding an end date to their current occupancy, add their new Unit/Bed.

Step by Step

1. Open the client 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.



Exit Client from a Program

Exiting a client from a program also exits them from their bed.

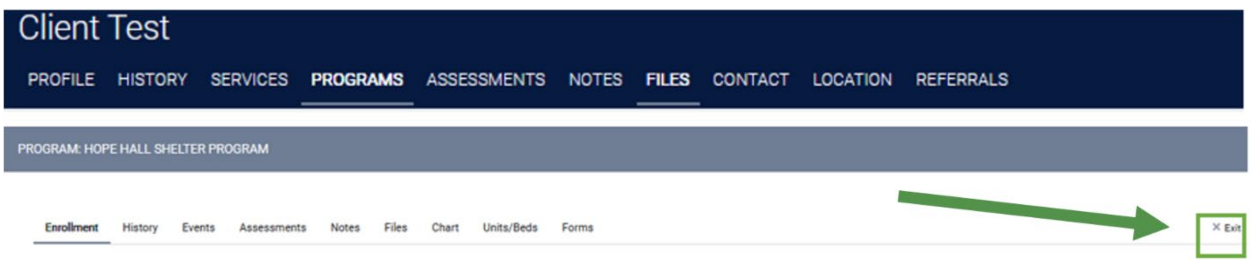
Update ONE before 8 am the day after a client exits.

Overview

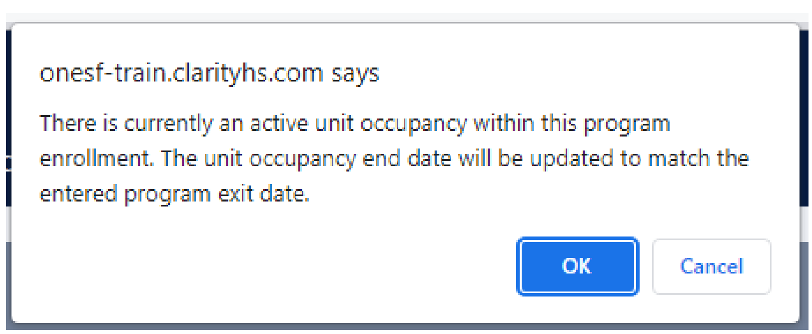
Exiting a client from the program will also exit a client from their assigned bed. Exit the client from the program by selecting the appropriate client, navigating to the program, and choosing ‘Exit’.

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. Complete all exit fields and click **SAVE & CLOSE** button. *If you are exiting the client with a Denial of Service, see next section.*



3. By exiting the client from the program, they will also be automatically exited from the bed or unit. Once the client 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:



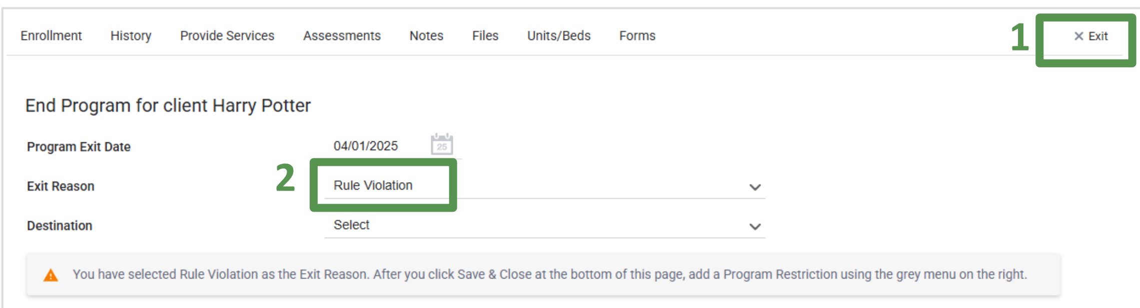
Denials of Service (Logged as Programs Restrictions in ONE)

Overview

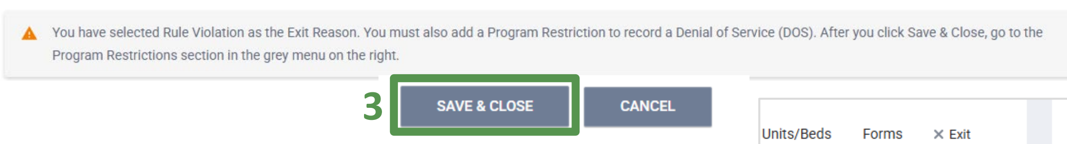
Denial of Service (DOS) describes a situation where a client commits a shelter rule violation that results in an exit from the program and a period during which the client cannot return to the shelter. As of May 2025, a DOS must be logged using the *Program Restrictions* functionality in ONE, which will prevent any referrals to the program during the DOS period.

Step by Step

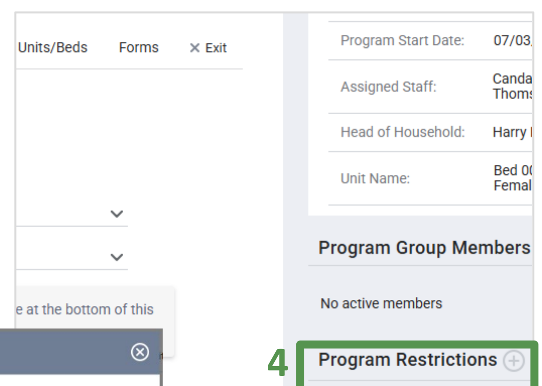
1. Open the client profile and navigate to their current enrollment at your site. Select the **Exit** button on the far right [1] (see steps 1 and 2 from the previous section).
2. Select "Rule Violation" from the *Exit Reason* field dropdown [2]. You will see a warning message (⚠) directing you to add a Program Restriction after saving the exit.

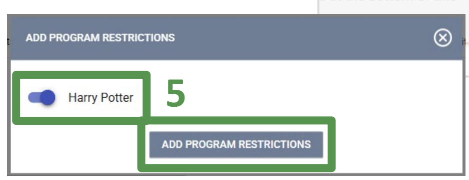


3. You will see another warning (⚠) at the bottom of the exit screen reminding you to add a Program Restriction after saving the exit. Click **SAVE & CLOSE** [3].

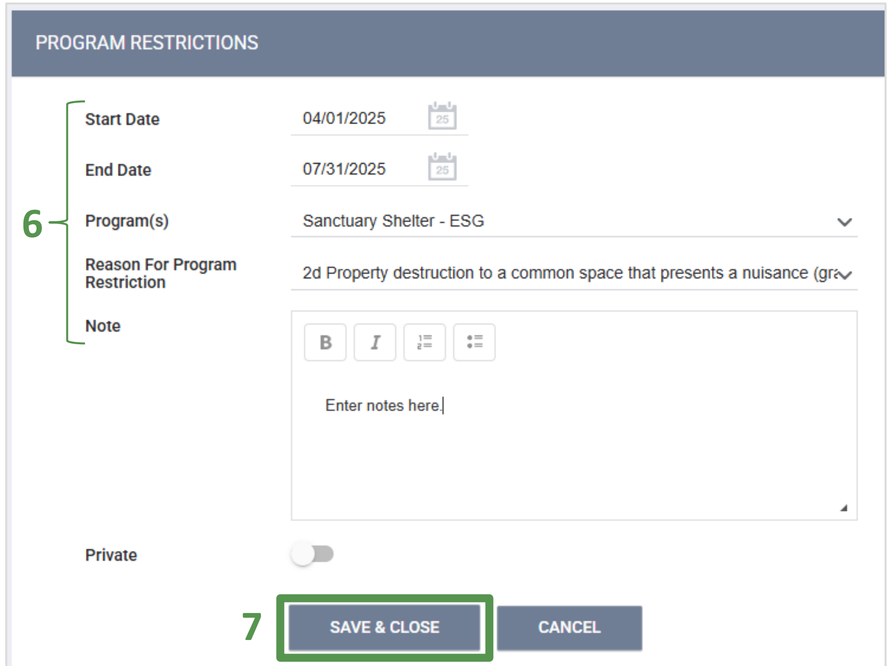


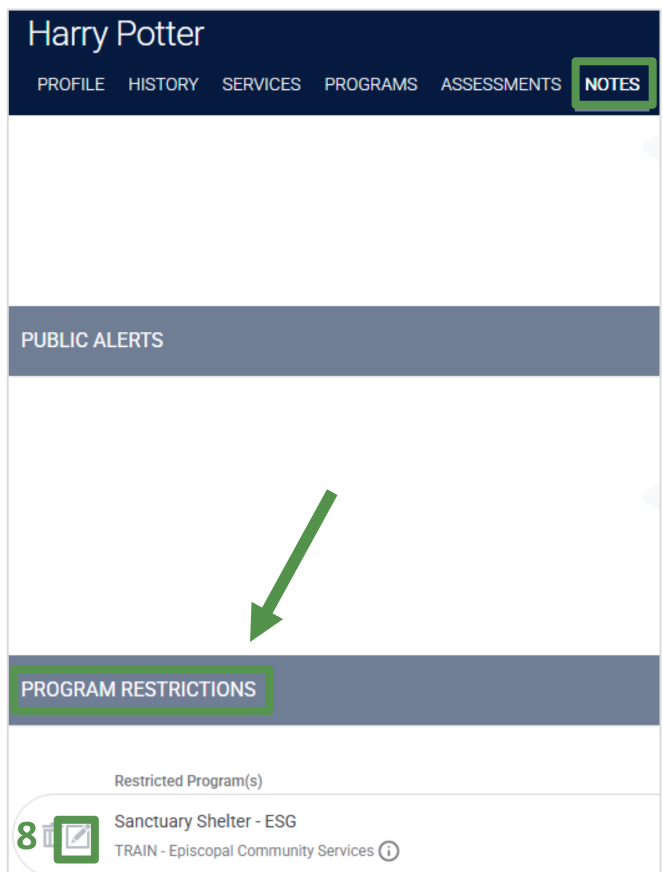
4. Program Restrictions are logged within the gray right-hand sidebar on the exit screen. Click the plus (⊕) to log a new DOS [4].
5. Use the toggle in the pop-up to confirm which client(s) in the enrollment is receiving the DOS and then click the **ADD PROGRAM RESTRICTIONS** button [5].





6. You will be taken to the **PROGRAM RESTRICTIONS** screen. Enter the **Start Date** and **End Date** of the DOS. The **Program(s)** dropdown will default to the program you just exited the client from. Choose the reason for the DoS in the **REASON FOR PROGRAM RESTRICTION** dropdown field and enter any additional information in the **Note** text box [6].
7. Click **SAVE & CLOSE** to complete the Program Restriction [7].
8. If needed, you can view or edit a DOS within the client's NOTES tab. Click the pencil icon next to the Program Restriction to edit [8].





Review Reports for Accuracy

New and updated reports are available in ONE.

Check rosters to ensure accuracy.

<u>Overview</u>

Review rosters 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 includes the unit numbers associated with a client's program enrollment. Additional helpful reports can be found in the Data Analysis tab under **Inventory - Temporary Shelter.** To confirm that beds or units are correctly identified as occupied, offline, or vacant, review the **Bed Assignments and Statuses report**.

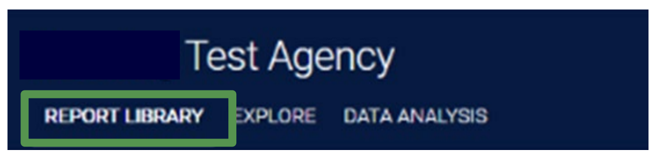
<u>Step by Step</u>

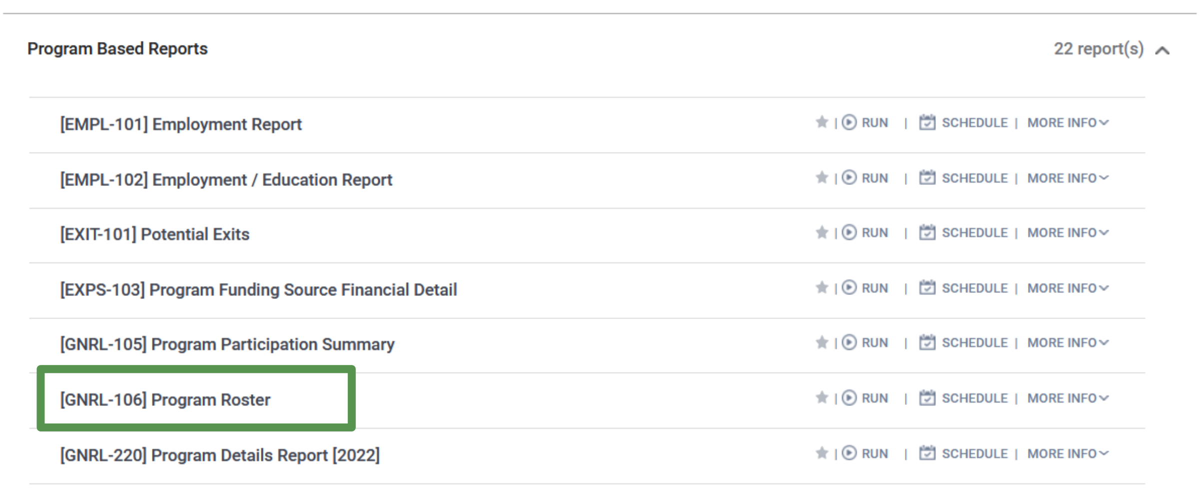
The Program Roster is available to all users within an agency and shows all clients enrolled in a program with their unit/bed assignment.

1. Program Roster

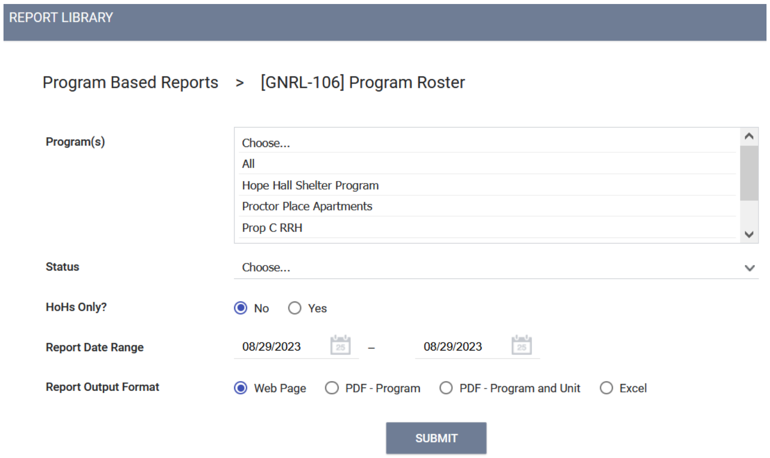
a. Under the waffle tool, select **Reports**.

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

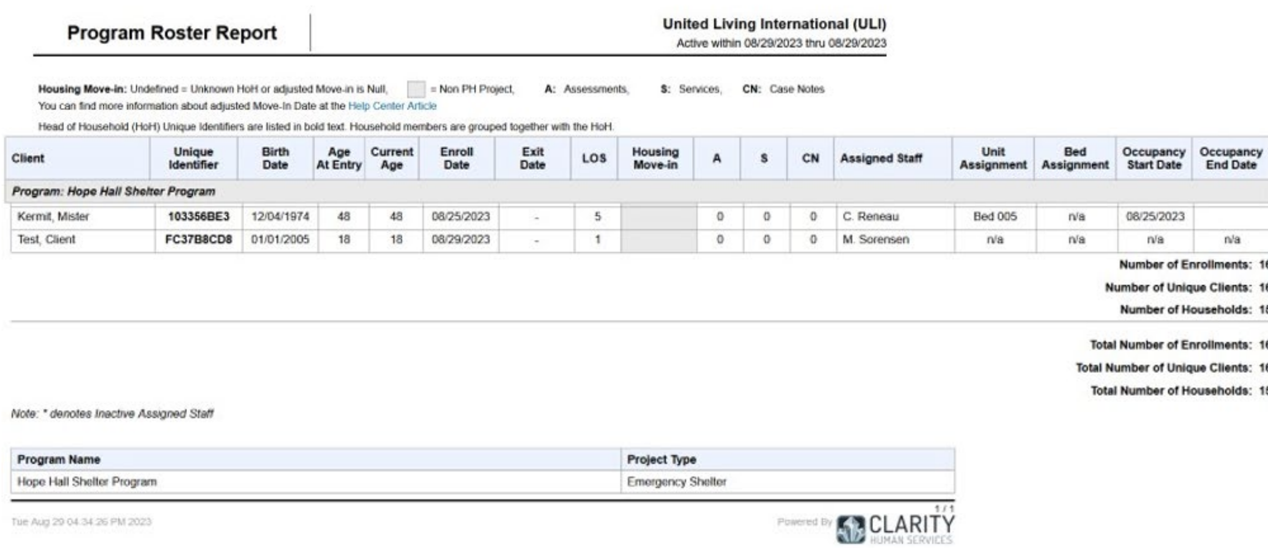




c. Select either the web or Excel version, which will include the bed information, or select the PDF version that includes both the program and unit.



d. Review the report for accuracy. Clients will either show as having a bed number or "n/a" under the Unit Assignment column. Note that the Bed Assignment column is always "n/a".



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*

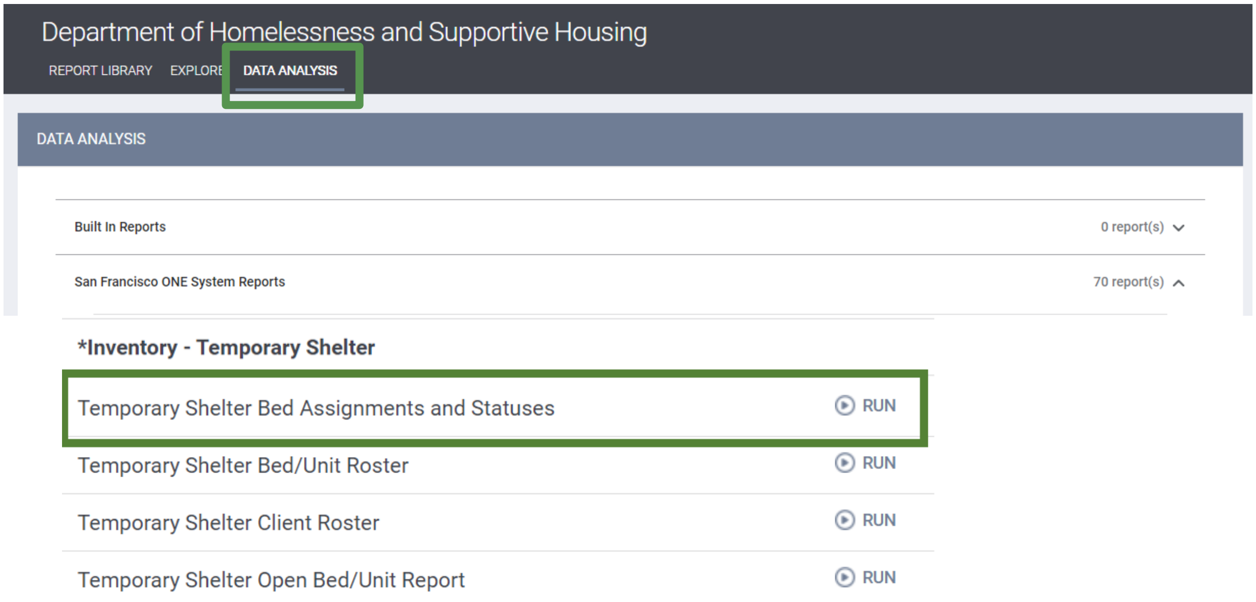
Program Name	Project Type
Hope Hall Shelter Program	Emergency Shelter

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

2. Inventory – Bed Assignments and Statuses

a. Under the waffle tool, select **Reports**. Select the **Data Analysis** tab. This page can often take a few additional seconds to load.

b. Select **San Francisco ONE System Reports** to expand the menu. Under ***Inventory – Temporary Shelter**, select the **Temporary Shelter Bed Assignments and Statuses** report.



c. The **Bed Assignments and Statuses** report provides a high-level overview of bed assignments and statuses by shelter or building. It shows how many clients are assigned to a bed and how many are unassigned. This report is useful for ensuring that all the clients at your site are assigned to a bed. At the bottom of the report, you can see exactly which clients are unassigned and click a link to go directly to their profile.

Counts of Clients by Assignment Status

Enrolled Clients	Clients Assigned to a Bed	Clients Not Assigned to a Bed
177	176	1
121	120	1
197	197	0
42	42	0
178	178	0

The report also shows the number of beds at each site that are Available, Inactive, or Occupied. This is useful for seeing an overview of all beds and their status.

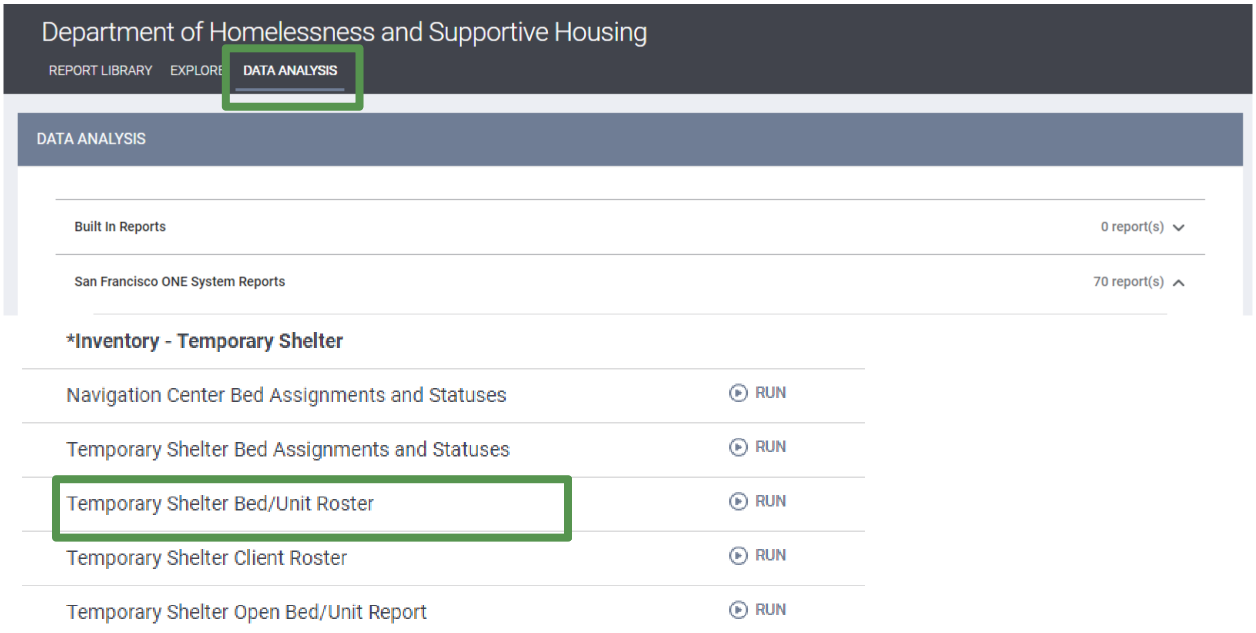
Beds by Status

Available	Inactive	Occupied	Offline
Beds in Inventory	Beds in Inventory	Beds in Inventory	Beds in Inventory
2	4	176	1
8	∅	120	∅
6	∅	197	∅
2	20	42	∅
8	∅	178	∅

3. Inventory – Temporary Shelter 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 ***Inventory – Temporary Shelter**, select the **Temporary Shelter Bed/Unit Roster** report.



c. The **Shelter Bed/Unit Roster** report provides a summary and detailed roster of beds in a building by their status and availability. 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 head of household will appear on this report as assigned to a bed.

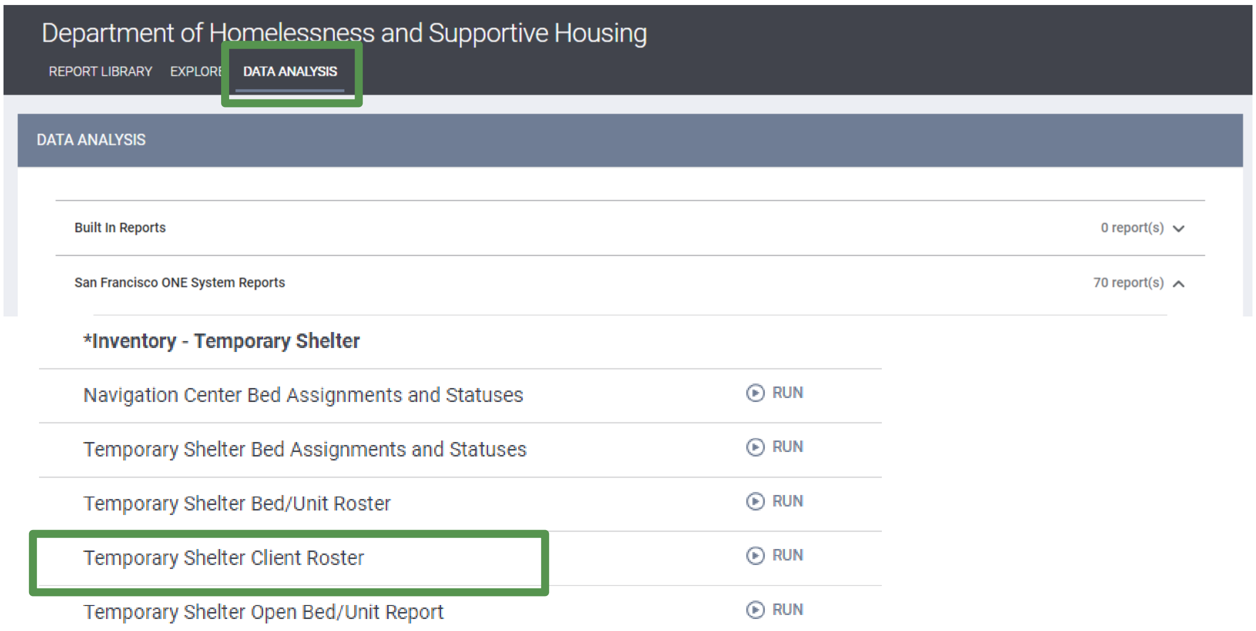
Units by Status

	Building	Unit Name	Unit Configuration	Current Availability	Offline Reason	Head of Household	Unique Identifier	ONE Profile Link	Occupancy Start Date
1		Bed 001	Adult- Single Bed	Available	∅	Willie Mays	00024	...	2023-08-17
2		Bed 002	Adult- Single Bed	Available	∅	∅	∅	∅	∅
3		Bed 003	Adult- Single Bed	Occupied	∅	Juan Marichal	00027	...	2023-08-28
4		Bed 004	Adult- Single Bed	Available	∅	∅	∅	∅	∅
5		Bed 005	Adult- Single Bed	Occupied	∅	Barry Bonds	00025	...	2023-07-18

4. Inventory – Temporary Shelter Client 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 ***Inventory – Temporary Shelter**, select the **Temporary Shelter Client Roster** report.



c. Select the shelter from the Program Name filter and hit the blue arrow button to refresh the report. The Temporary Shelter Client Roster lists all clients currently enrolled in a shelter program along with their bed assignments. If the **Unit Assignment** column is blank, it means the client is enrolled in shelter but not assigned to their bed. See section *Assign Client to a Bed* (page 6) to update any incorrect entries. All household members will appear on this report, but *only* the head of household will appear with a bed assignment.

Temporary Shelter Client Roster

	Client Full Name	Unique Identifier	Birth Date	Programs Name	Enroll Date	Exit Date	LOS	Housing Move-in Date	Assigned Staff	Unit Assignment	Occupancy Start Date
1	Andres Torres				2023-08-22	∅	15	∅		Bed 105	2023-08-22
2	Freddy Sanchez				2023-08-16	∅	21	∅		Bed 093	2023-08-16
3	Buster Posey				2023-08-30	∅	7	∅		∅	2023-08-30
4	Cody Ross				2023-08-01	∅	36	∅		Bed 033	2023-08-01
5	Juan Uribe				2023-01-30	∅	219	∅		Bed 055	2023-07-18
6	Pat Burrell				2023-08-28	∅	9	∅		Bed 003	2023-08-28