



Bitfocus



Inventory

Family Shelter & Transitional Housing Workflow

December 3, 2024

Agenda

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



What is Inventory?

Inventory Overview

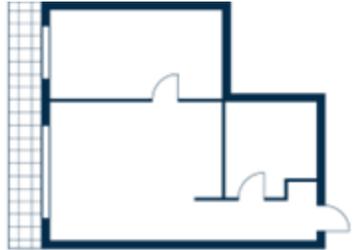
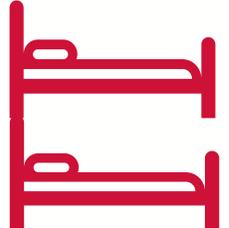
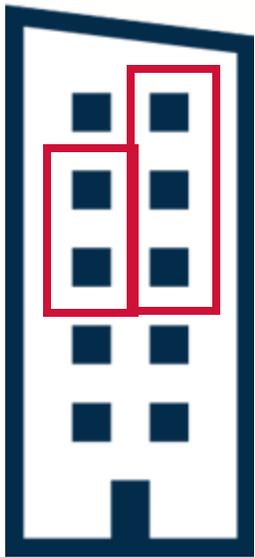
Buildings



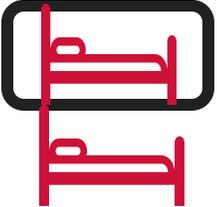
Unit Configurations



Units/Beds



Bed 001



Bed 002



INVENTORY Dashboard



INVENTORY Dashboard

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

The screenshot displays the INVENTORY Dashboard interface. At the top, there are filters for Status, Agency, Site, and Building. The main content area shows a list of units with their details and status. A detailed view of unit 100 is shown in the center, highlighting its overview and more information. To the right, a map of San Francisco shows the location of the units. On the far right, a summary panel provides key statistics.

Unit ID	Status	Agency	Site	Building	Program
10	Pending Occupancy	[TRAINING] Tenderloin Housin...	All Star Hotel		
100	Available	[Training] Lutheran Social Serv...	990 Polk	990 Polk	990 Polk - LOSP + MHSA
101	Available	[TRAINING] Tenderloin Housin...	Vincent Hotel		

Unit 100 Details:

- Name:** 100
- Type:** Adult PSH - SRO-Shared Bath- LOSP+MHSA
- Agency:** [Training] Lutheran Social Services of Norcal
- Site:** 990 Polk
- Building:** 990 Polk
- Program:** 990 Polk - LOSP + MHSA
- Beds:** 1
- Address:** 990 Polk St, San Francisco, CA 94109

Unit 100 More Information:

- ADA:** No
- Accessible for Wheelchair:** No
- Bariatric Beds:** No
- Beside Outlet:** No
- Higher Bed:** No

Summary Panel:

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

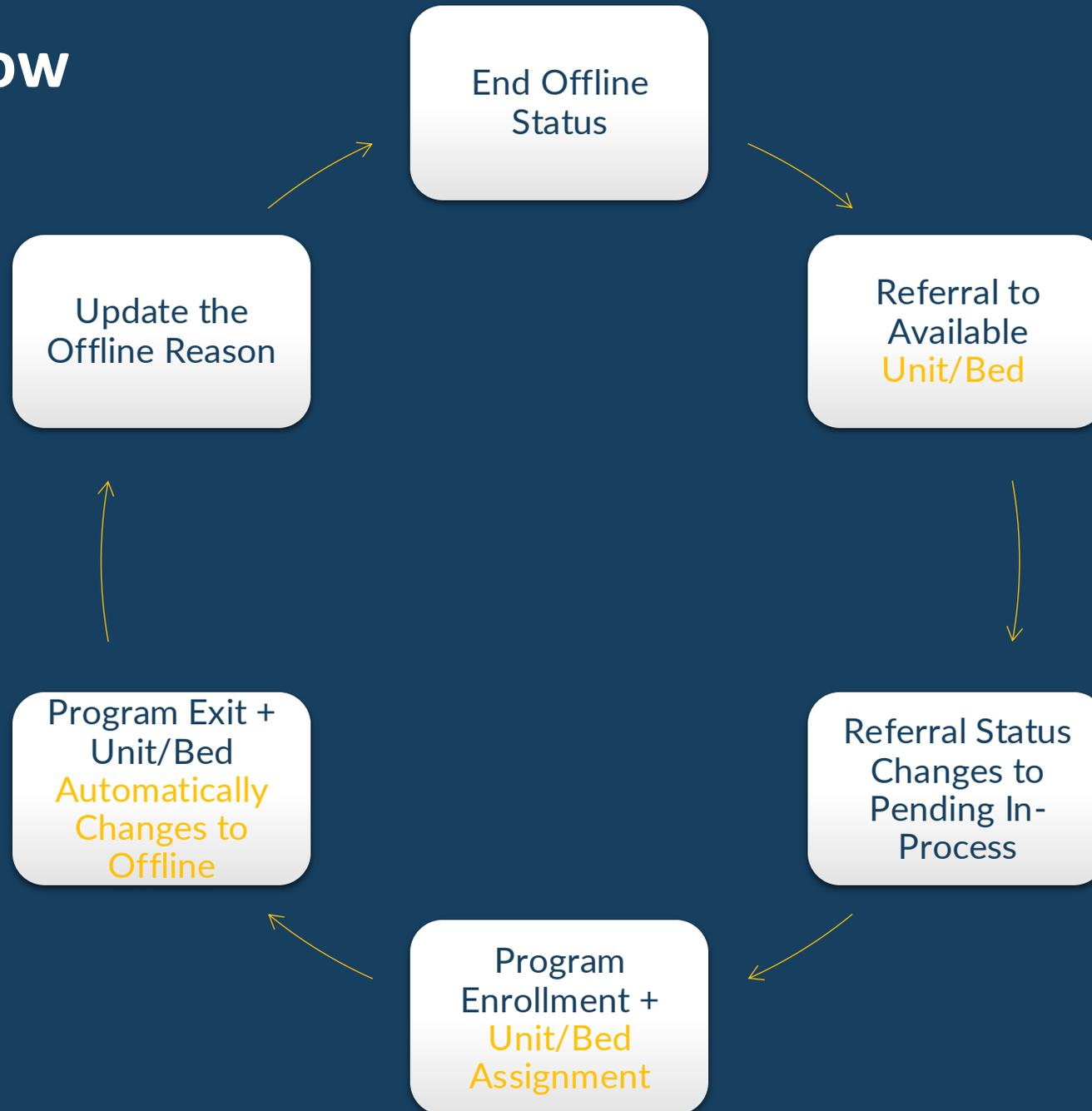


Workflow

Workflow Changes



New Workflow



Referrals

REFER

ACCEPT

ENROLL

PLACE

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

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

Pending In-Process

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

Referred Date	09/16/2022	
Days Pending	486 day(s)	
In Process	0 day(s)	
Qualified	Reassigned	
CE Demo score	5	
Referred by Staff	Sara Hoffman	
Case Manager	Select	
Last Activity	09/16/2022	 CHECK-IN
Current Status	Pending	<input checked="" type="checkbox"/>
Status Date	01/16/2024	
<input type="text" value="New Status"/>	<input type="text" value="Pending - In Process"/>	
Private	<input type="checkbox"/>	
<input type="button" value="SAVE CHANGES"/>		<input type="button" value="CANCEL"/>

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

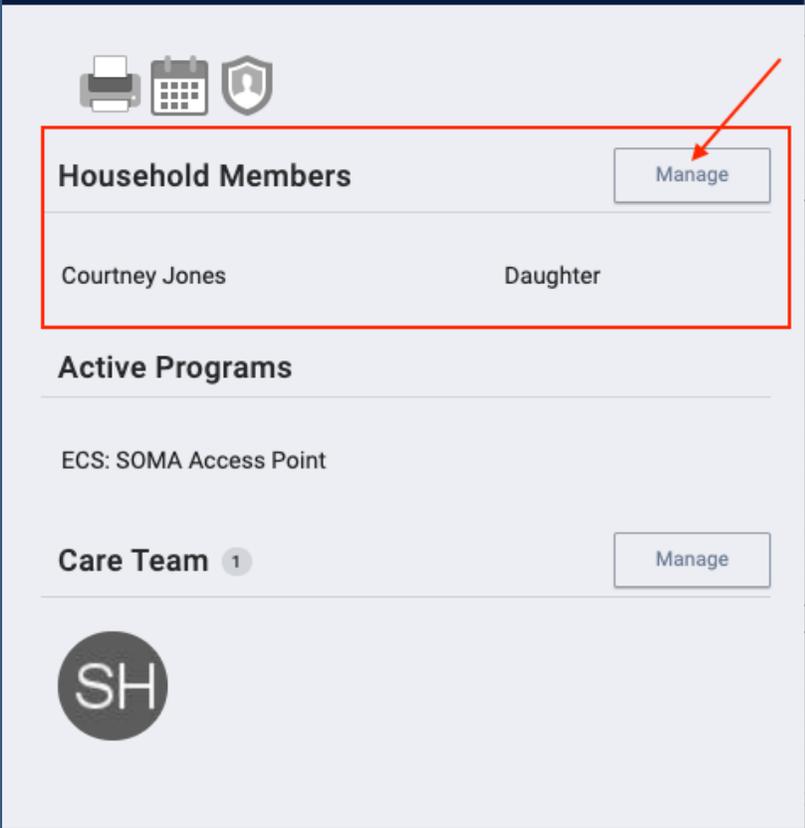
*This step is very important!
Units/beds will continue to show
as Pending Occupancy if not
denied*

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	

Household Composition

From the client profile page:

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



The screenshot displays a client profile page with a navigation bar at the top containing icons for a printer, calendar, and shield. Below the navigation bar, the 'Household Members' section is highlighted with a red box and contains a 'Manage' button with a red arrow pointing to it. Underneath, the name 'Courtney Jones' is listed with the relationship 'Daughter'. The 'Active Programs' section shows 'ECS: SOMA Access Point'. The 'Care Team' section has a 'Manage' button and a small circle with the number '1'. At the bottom, there is a circular logo with the letters 'SH'.

Accepting Referrals

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

PROGRAMS: AVAILABLE

Evergreen Emergency Shelter

Active Clients

5 CLIENTS

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 16 days.

Program Placement a result of Referral to Unit: 001 provided by TRAIN - San Francisco Family Coordinated Entry Agency

Include group members:

Joy Simmons

PRINT DIRECTIONS ENROLL

Toggle must be on to accept the referral

Shows you're enrolling in the correct program

Select household members also going to shelter

REFER

ACCEPT

ENROLL

PLACE

Unit/Bed Assignment

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

PROGRAM: EVERGREEN EMERGENCY SHELTER

Enrollment	History	Provide Services	Assessments	Notes	Files	Chart	<u>Units/Beds</u>	Forms
							Unit	Start Date
							Bed 004 Evergreen Emergency Shelter, Evergreen Emergency Shelter	05/20/2024 8:30 AM

Enrollment Sidebar

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

0 DAYS ACTIVE PROGRAM

Program Type:	Group (2)
Program Start Date:	10/24/2024
Assigned Staff:	Sara Hoffman <input checked="" type="checkbox"/>
Head of Household:	Lucy Simmons <input checked="" type="checkbox"/>
Unit Name:	001

Moving Units/Beds

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*

Moving Units/Beds

End Current Unit/Bed Stay

- Add an end date to the current unit/bed

PROGRAM: EVERGREEN EMERGENCY SHELTER

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

Unit	Start Date
 001 Evergreen Emergency Shelter, Evergreen Emergency Shelter	10/24/2024 12:00 AM

Edit

EDIT UNIT

Start Date 08/01/2024 12:00 AM

End Date 10/22/2024 12:00 AM

Current Instance time: 10/24/2024 12:48 PM

SAVE CHANGES CANCEL

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

ADD UNIT/BED

ADD UNIT/BED +

Start Date 10/23/2024 12:45 PM

End Date

Eligibility Override

Eligible For Partial Dates

Available Units/Beds 004 (Evergreen Emergency Shelter, Ever...)

Current Instance time: 10/24/2024 12:49 PM

ADD CANCEL

Exits

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

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 main content area is titled 'PROGRAM: JEFFERSON HOTEL - GF' and features a sub-navigation bar with options: Enrollment, History, Assessments, Notes, Files, Units, Forms, and a red-bordered 'X Exit' button. Below this is a 'Program Service History' section. A table on the right shows unit details with columns for Start Date and End Date. The first row shows a unit at Jefferson Hotel with a start date of 08/03/2022 and an end date of 08/03/2022, where the end date is highlighted with a red box. The second row shows a unit at Jefferson Hotel with a start date of 07/11/2022 and an end date of 07/12/2022.

	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

Unit/Bed Status

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). <i>Call or email help desk to set to inactive or if accidentally made inactive.</i>

Automatic Offline Functionality

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

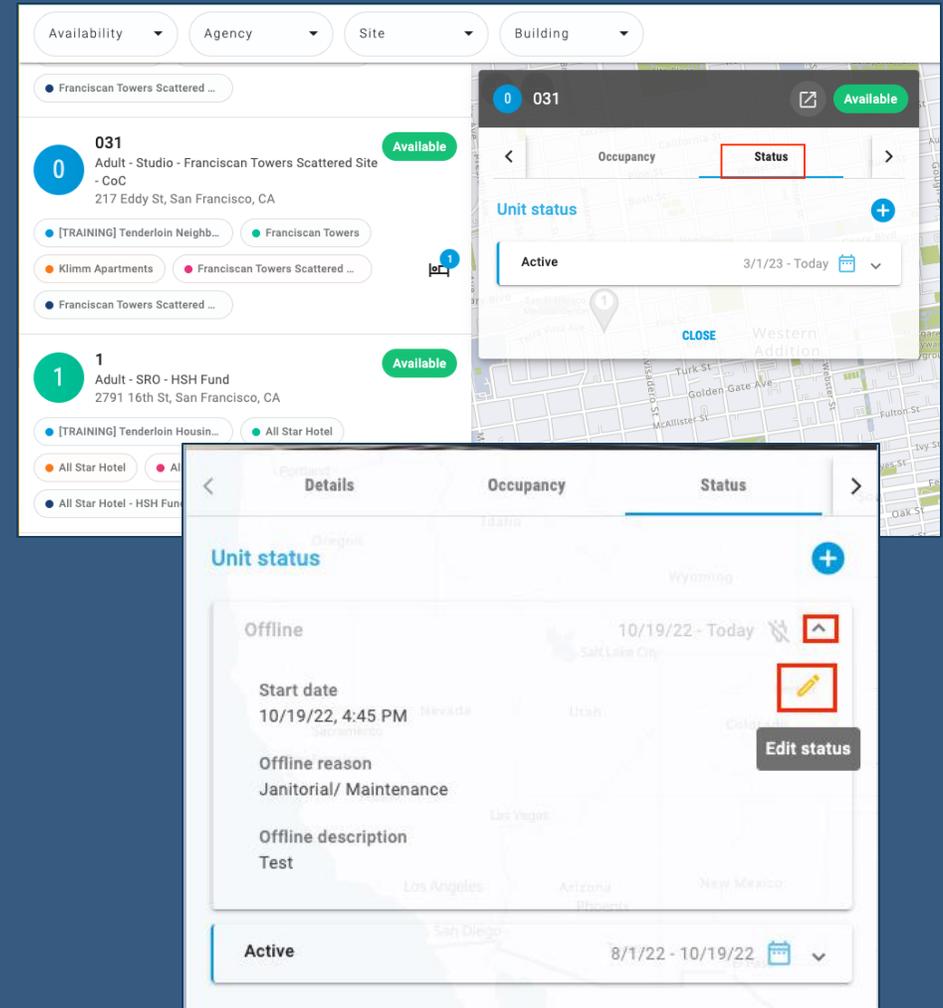
The screenshot displays a software interface with a top navigation bar containing dropdown menus for 'Availability', 'Agency', 'Site', and 'Building'. Below this, two unit entries are shown:

- Unit 002:** Labeled 'Available' in a green bubble. It is a 'Family - 2BR' unit at '111 Page St, San Francisco, CA'. It has several associated services: 'TRAIN - Compass Family Servi...', 'Compass Clara House', 'Compass Clara House', 'Compass Clara House', 'Compass Clara House - N/A', 'General Fund', and 'Prop C'.
- Unit 003:** Labeled 'Offline' in a grey bubble. It is also a 'Family - 2BR' unit at '111 Page St, San Francisco, CA' with the same set of associated services as Unit 002.

To the right of the unit list is a map of San Francisco, showing the 'Western Addition' neighborhood. A location pin labeled '12' is placed on the map, corresponding to the address of the units.

Updating Offline Reason and Description

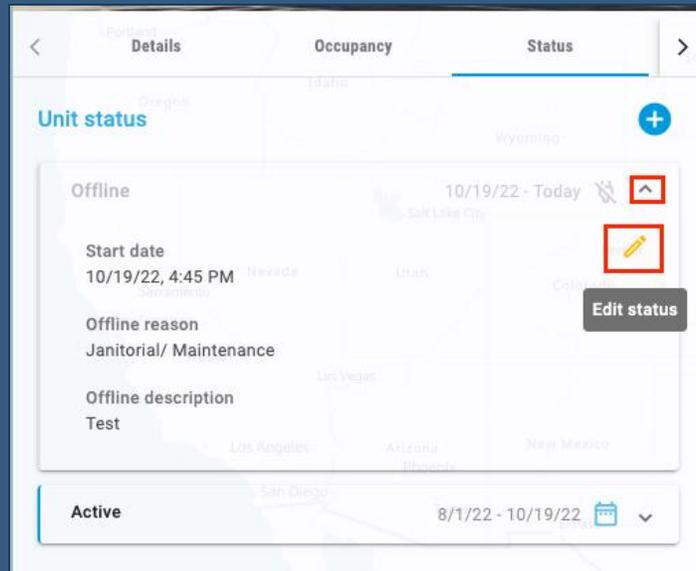
- Open the *Display Card* for the unit
- Edit by clicking pencil icon
- Update Offline Reason and Description



Ending or Creating Offline Status

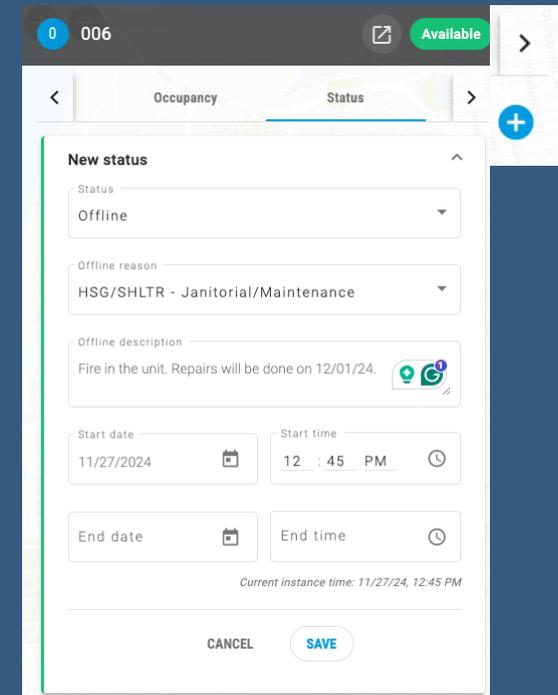
Ending

- Click on the pencil icon
- Enter End Date



Creating

- Blue + sign
- Leave End Date blank



Reports

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, <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 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
<i>Program: Rivers Shelter</i>															
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

Inventory Reports

- Located under the *Data Analysis Tab*

The screenshot displays the Bitfocus System interface. At the top, the 'System' header is visible, followed by navigation tabs: 'REPORT LIBRARY', 'EXPLORE', and 'DATA ANALYSIS'. The 'DATA ANALYSIS' tab is highlighted with a yellow circle, and a yellow arrow points from it to the 'REPORTS' icon in the right-hand navigation menu. Below the tabs, the 'DATA ANALYSIS' section contains a list of reports:

Report Category	Report Count
Built In Reports	0 report(s)
San Francisco ONE System Reports	86 report(s)
System Reports	6 report(s) ▾

The 'San Francisco ONE System Reports' entry is circled in yellow. The right-hand navigation menu includes icons for 'SETUP', 'MANAGE', 'REPORTS', 'CALENDAR', 'MERGE', 'DATA IMPORT', and 'INVENTORY'. The 'REPORTS' icon is also circled in yellow.

Shelter and Transitional Housing Bed/Unit Roster

- Located under the Family CES section

REPORT LIBRARY EXPLORE DATA ANALYSIS

Family CES	
*SF Family Housing Prioritization Dashboards	⊙ RUN
SF Family Individual Shelter Room Placement Criteria Dashboard	⊙ RUN
All Referrals to a Housing Program	⊙ RUN
CE Families Whose Referral on the Community Queue Expired	⊙ RUN
Families with Children in SFUSD V2	⊙ RUN
Family CE Income Data	⊙ RUN
Family Community Queue Referrals	⊙ RUN
Family Flex Pool & RRH Housing Program Openings	⊙ RUN
Family Open PSH Units	⊙ RUN
Family Priority List with Disabling Conditions	⊙ RUN
Family Priority List with Referral History	⊙ RUN
Family Shelter & Transitional Housing Bed/Unit Roster - DRAFT	⊙ RUN
Family Shelter and Transitional Housing Openings	⊙ RUN

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

13

Total Units

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

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	HSD/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					

Next steps & Support

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

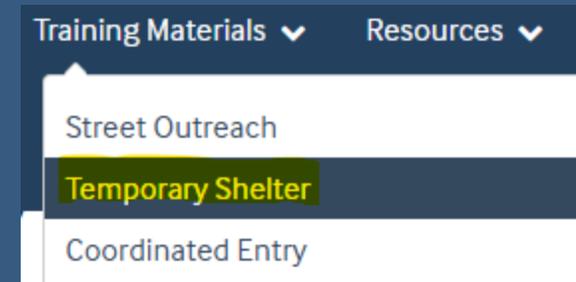
What if I Need Support?

➤ 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

Questions?

