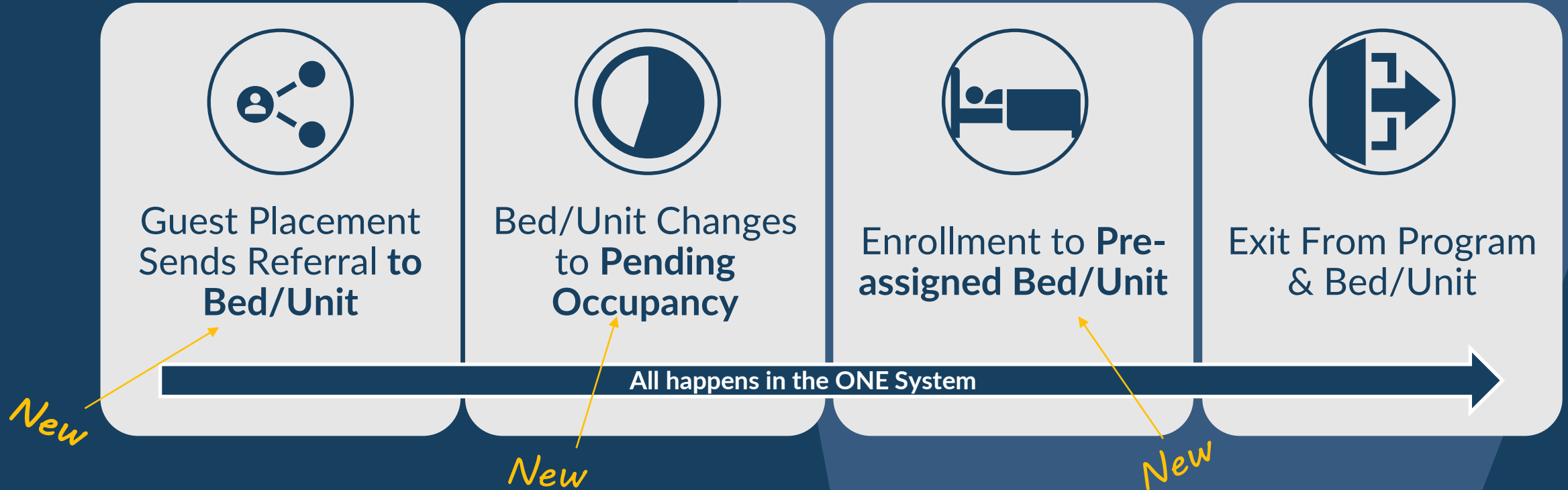# Inventory

Adult and TAY Shelter Workflow

Non-Congregate

Temporary Shelter Workflow

Bitfocus

Temporary Shelter Workflow

Workflow remains the same, but with new features related to bed assignment happening at time of referral

Guest Placement Sends Referral **to Bed/Unit**	Bed/Unit Changes to **Pending Occupancy**	Enrollment to **Pre-assigned Bed/Unit**	Exit From Program & Bed/Unit

New

New

New

All happens in the ONE System

Referral and Placement Steps

Referral from Guest Placement

- Guest Placement sends a *Direct Referral*

- Non-Congregate Sites: the referral is **only made for the Head of Household** (HoH)

- Notes may be included in the referral (e.g., Referral Source)

Pending Tab

- Shows referrals for the user's agency

- Filters allow you to refine your search
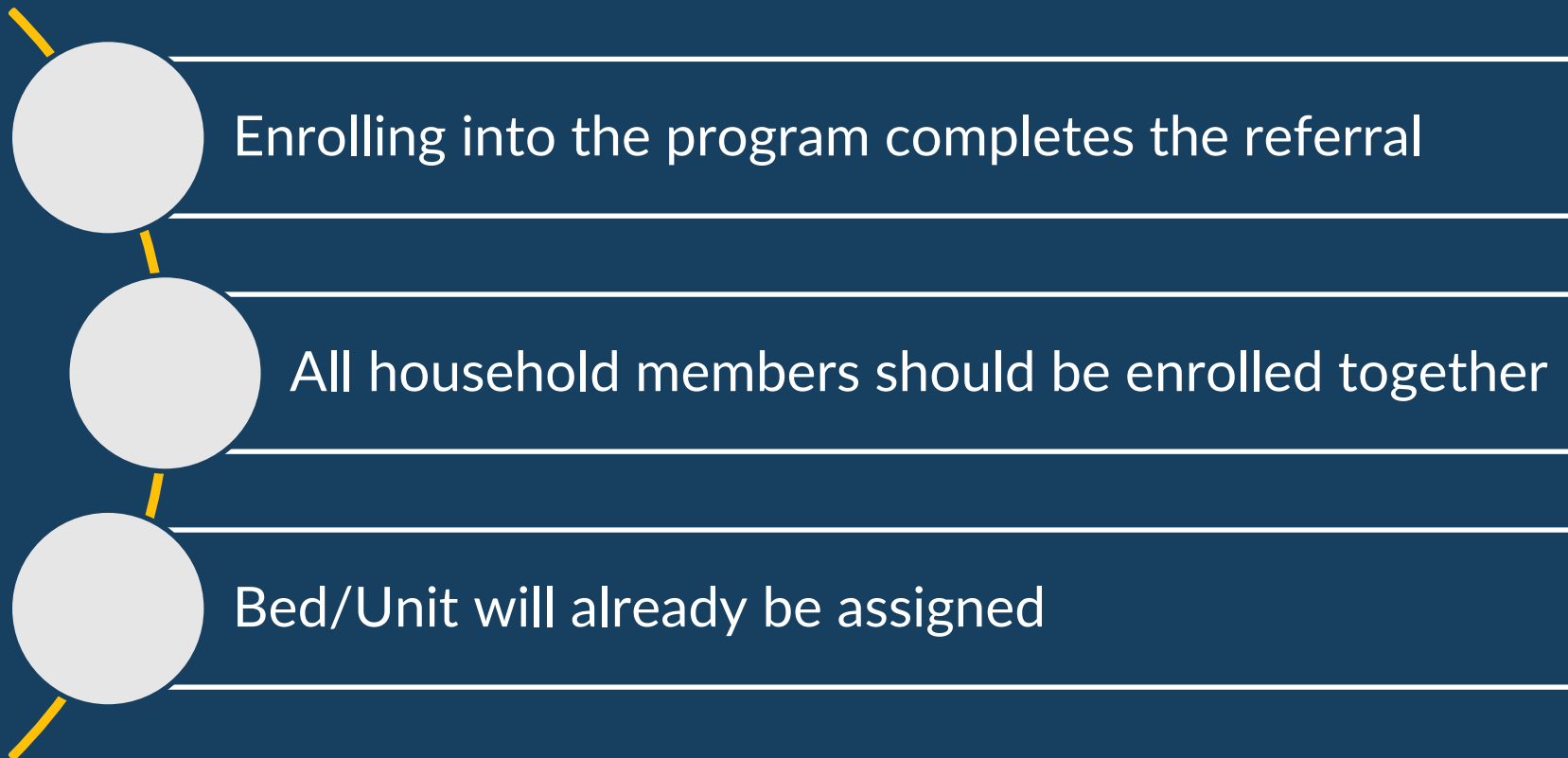 - Usually, filter by **program**

Denying Referrals

- Deny the referral if a client refuses placement or doesn't show

  o Status: Denied

  o Send to Community Queue: No

  o Denied by Type: Client

  o Denied Reason: Client did not show up or refused services

  o 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

Enrolling into the program completes the referral

All household members should be enrolled together

Bed/Unit will already be assigned

Accepting Referrals

Bed/Unit Assignment

- Bed/Unit assignment will already be assigned

- Bed/ Unit assignment **only shows in the HoH record**

  o Non-HoH will <u>not</u> have a unit assignment

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/unit, it's visible in the enrollment sidebar

- Remember, this will only show for the HoH

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Transferring Beds/Units

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Transferring Beds/Units

Staff can move clients to a different bed/ unit

End stay in current bed/unit
Action: Enter end date

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

Bed/unit can be changed when the client arrives

Transferring Beds/Unit

End Current Bed/Unit Stay

- Add an end date to the current bed/unit

Assign to a New Bed/Unit

- Assign HoH to a new bed/unit

- Start date should not overlap with end date of old bed/unit

Exits

Bitfocus

Exiting Client from Unit

⋯→ 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/unit

    ⋯→ Complete an exit for all household members

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

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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 and the effective start/end dates.

- Exit Destination must also be entered. Typically, it is "No exit interview completed."

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

Unit Status

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Unit Status/Availability

- *Unit Status* can be changed from the dashboard
- Provides the ability to reflect a unit's status in real-time
- New status: Pending Occupancy

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). Please call or email the help desk to be set to inactive or if it was accidentally made inactive.

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Automatic Offline

- Reminder- the bed/unit will automatically change to offline after the client has exited

Non-Congregate

- Will auto-offline for 1 week

Reports

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Program Roster

- Located in the Report Library

- Program stay information for selected programs

- Includes bed/unit assignment

Inventory Reports

- Located under the *Data Analysis Tab*
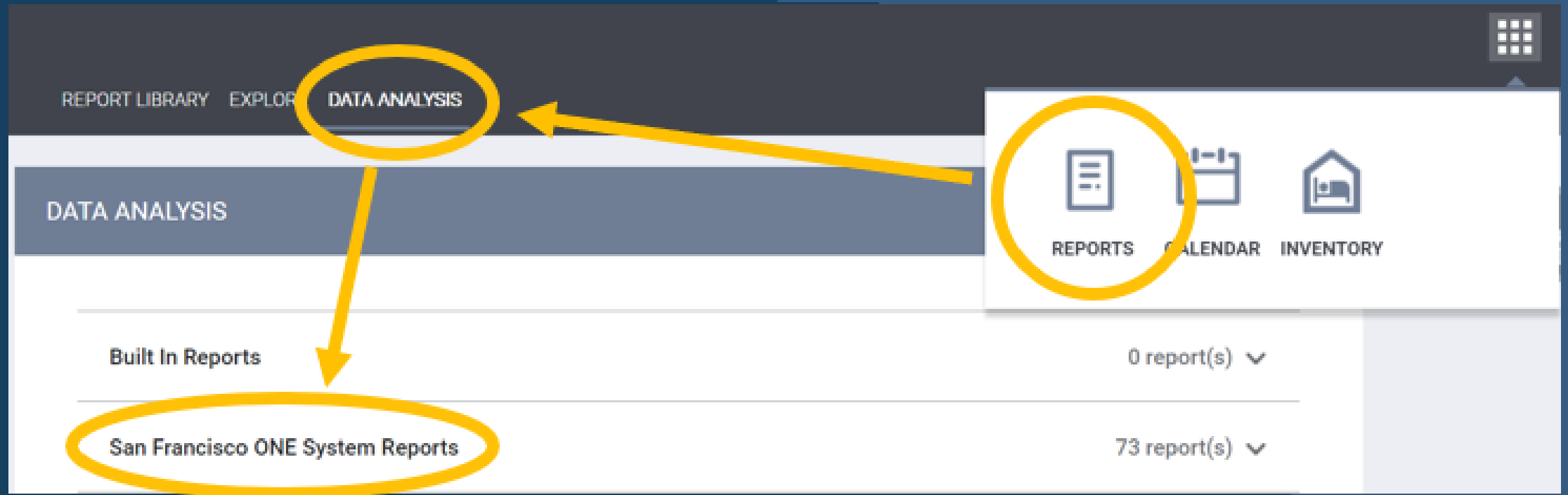
Inventory Reports

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

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 ^	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	Ø	Will Clark	00022	·　····	2023-08-17
2		Bed 002	Adult- Single Bed	Available	Ø	Ø	Ø	Ø	Ø
3		Bed 003	Adult- Single Bed	Occupied	Ø	Juan Marichal	00027	····	2023-08-28
4		Bed 004	Adult- Single Bed	Available	Ø	Ø	Ø	Ø	Ø
5		Bed 005	Adult- Single Bed	Occupied	Ø	Barry Bonds	00025	····	2023-07-18

Client Roster

- Roster organized by client name

- Not recommended for non-congregate (use *Program Roster* from previous slide)

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

What if I Need Support?

- **One-on-Ones**
  - Schedule a time with ONE System team: *https://shorturl.at/5p7f5*
- **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