



Bitfocus



DEPARTMENT OF  
HOMELESSNESS AND  
SUPPORTIVE HOUSING

Inventory

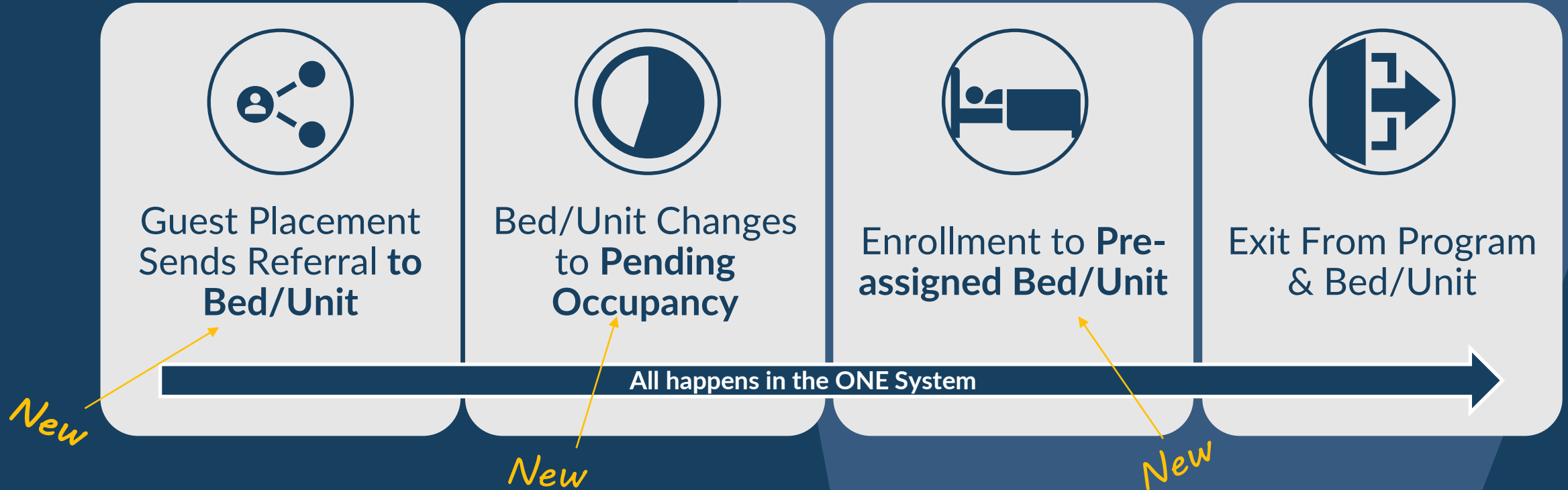
Adult and TAY Shelter Workflow

*Non-Congregate*

# Temporary Shelter Workflow

# Temporary Shelter Workflow

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



# 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)

REFERRALS

Pending

Community Queue

Analysis

Completed

Denied

Sent

Availability

Open Units

Pending Referrals

Search

Sort By

Mode

Characteristic

Eligible Clients Only

SEARCH

| Client  | Referral Date | Qualified  | Days Pending           |
|---|---------------|------------|------------------------|
| Jenny Jones<br>Program: Haight Street Apartments<br>Referred by: [TRAINING] Department of Homelessness and Supportive | 01/07/2022    | Reassigned | 282 total<br>0 pending |

NOTES

SH

Reply from Sara Hoffman @ Sarah Smith Housing Services Oct 17, 2022 at 03:41 PM

Intake appointment scheduled for 11/1/22.

B

I

REFER

ACCEPT

ENROLL

PLACE

# Pending Tab

- Shows referrals for the user's agency
- Filters allow you to refine your search
  - Usually, filter by **program**

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           |
|--|--|------------|------------------------|
| <b>Bitfocus Test</b><br>Program: Evergreen Emergency Shelter<br>Referred by: TRAIN - Department of Homelessness and Supportive Housing ⓘ | 05/13/2024   | No         | 7 total<br>7 pending   |
| <b>Tyler Adams</b><br>Program: Hope Housing<br>Referred by: TRAIN - San Francisco Adult Coordinated Entry Agency ⓘ                       |  02/12/2024 | Reassigned | 98 total<br>98 pending |

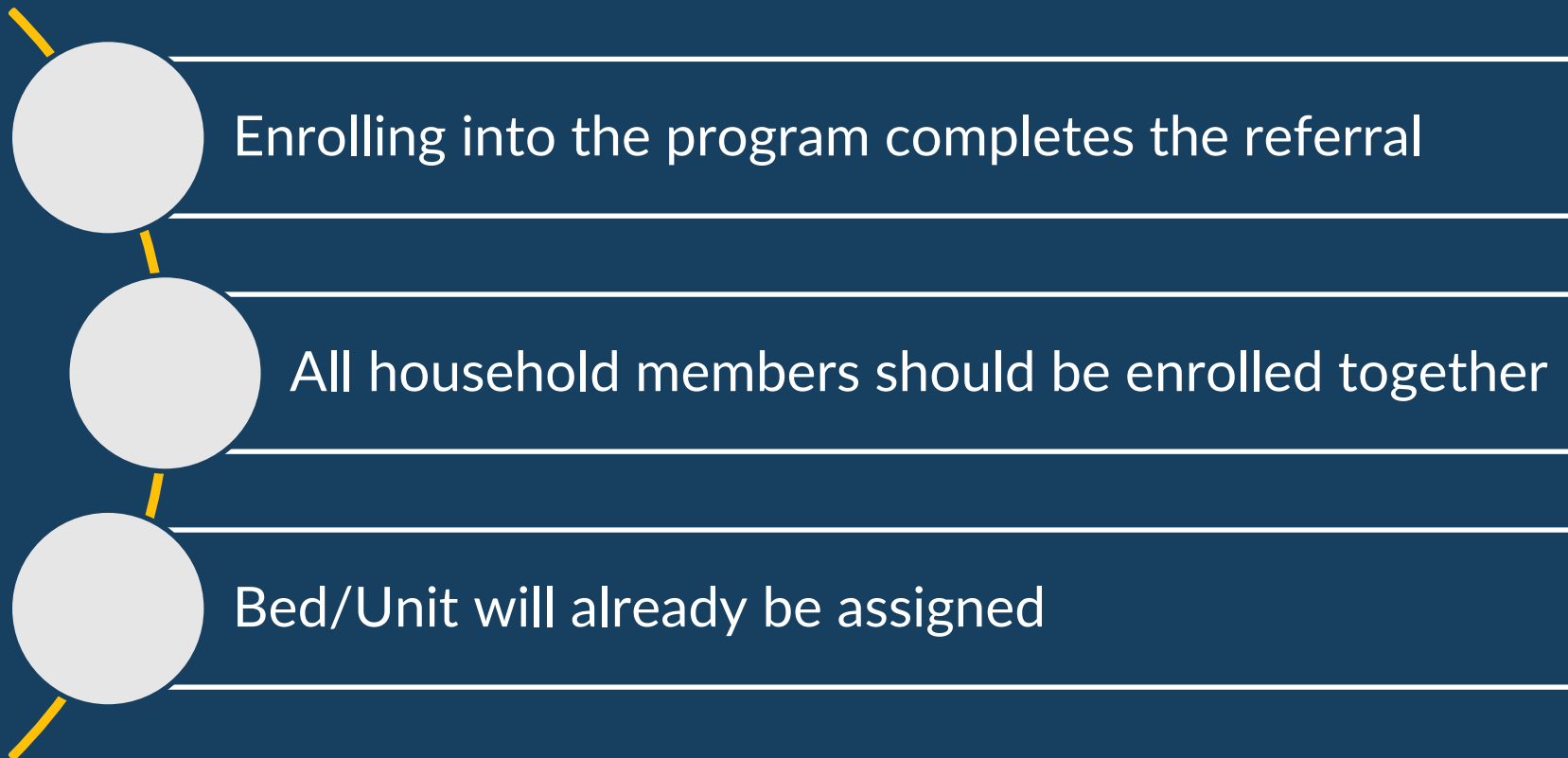
# Denying Referrals

- Deny the referral if a client refuses placement or doesn't show
  - Status: Denied
  - Send to Community Queue: No
  - Denied by Type: Client
  - Denied Reason: Client did not show up or refused services
  - 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





REFER

ACCEPT

ENROLL

PLACE


# Accepting Referrals

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

1  
CLIENT

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 7 days.

☒ Program Placement a result of Referral to Unit: Bed 005 provided by TRAIN - Department of Homelessness and Supportive Housing

**Include group members:**

☒ Allie Sebastian

 PRINT DIRECTIONS

ENROLL

*Shows you're enrolling in the correct program*

*Select household members for people sharing a unit*

*Toggle must be on to accept the referral*

# Bed/Unit Assignment

- Bed/Unit assignment will already be assigned
- Bed/ Unit assignment **only shows in the HoH record**
  - Non-HoH will not have a unit assignment


| PROGRAM: EVERGREEN EMERGENCY SHELTER                                |                    |
|---|--------------------|
| Enrollment  | History            |
| Provide Services  | Assessments        |
| Notes   | Files              |
| Chart   | <b>Units/Beds</b>  |
| Forms   |                    |
| Unit  | Start Date         |
| Bed 004<br>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

104

DAYS  
ACTIVE PROGRAM

|                     |  |
|---------------------|--|
| Program Type:       | Individual   |
| Program Start Date: | 07/06/2022   |
| Assigned Staff:     | Melissa Wheeler  |
| Head of Household:  | Randall Hall  |
| Unit Name:          | 104  |

# Transferring Beds/Units

# 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

The screenshot shows the 'EDIT UNIT' modal for 'Bed 001' at the 'Hope Hall, Hope Hall Navigation Center'. The modal has a title bar with a close button. Below the title bar, there are two input fields: 'Start Date' with the value '05/23/2023 11:45 AM' and 'End Date' with the value '08/22/2023 5:00 PM'. The 'End Date' field is highlighted with a red box. At the bottom of the modal, there are two buttons: 'SAVE CHANGES' and 'CANCEL'. The background shows the 'PROGRAM: HOPE HALL SHELTER PROGRAM' interface with a 'Units/Beds' tab selected.

## 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

The screenshot shows the 'ADD UNIT' modal. It has a title bar with a close button. Below the title bar, there are four input fields: 'Start Date' with the value '07/18/2022', 'End Date' with a date range selector, 'Eligibility Override' with a toggle switch, and 'Available Units' with a dropdown menu showing 'Unit 101 (St. Anthony (PSH), Building 1)'. At the bottom of the modal, there are two buttons: 'ADD' and 'CANCEL'.

# Exits

# 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

The screenshot displays the Bitfocus interface for a client named Brad Jones. The 'PROGRAMS' tab is selected, showing 'PROGRAM: JEFFERSON HOTEL - GF'. Below this, the 'History' tab is active, and a red box highlights the '× Exit' button. To the right, the 'Units' tab is active, showing a table of units with columns for 'Start Date' and 'End Date'. The 'End Date' for the first unit is highlighted with a red box.

|   | Start Date | End Date   |
|---|------------|------------|
| Jefferson Hotel, Jefferson Hotel        | 08/03/2022 | 08/03/2022 |
| 105<br>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                |

# 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 clear and present danger to the health, safety, or property of the community. |   |
| Effective Date of Denial of Service  | 06/26/2024   |  |
| Date of Denial of Service Expiration | 09/26/2024   |  |

# Unit Status

# 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. |

# 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

# Program Roster

- Located in the Report Library
- Program stay information for selected programs
- 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

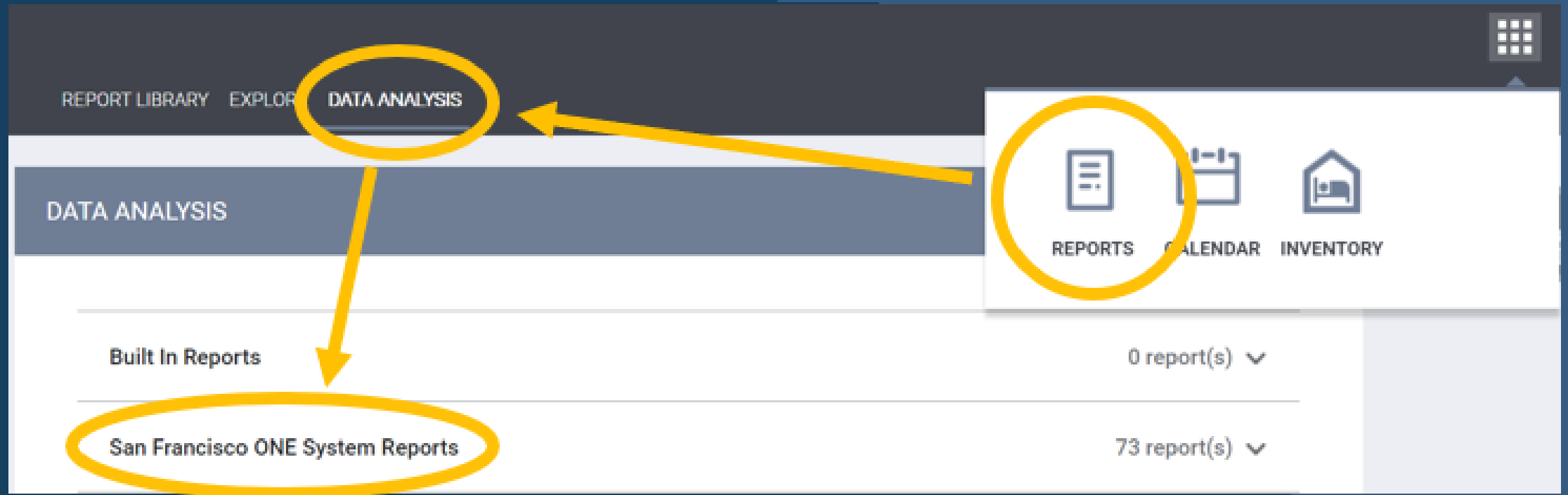
Total Number of Households: 5

Note: \* denotes Inactive Assigned Staff

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# Inventory Reports

- Located under the *Data Analysis Tab*





# Inventory Reports

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

| <b>*Inventory - Temporary Shelter</b>            |       |
|--|-------|
| Temporary Shelter - Bed Assignments and Statuses | ⏮ RUN |
| Temporary Shelter - Bed/Unit Roster              | ⏮ RUN |
| Temporary Shelter - Client Roster                | ⏮ RUN |

# 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            |                | Will Clark        | 00022             |                  | 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           |

# Client Roster

- Roster organized by client name
- Not recommended for non-congregate (use *Program Roster* from previous slide)

Temporary Shelter Client Roster

|   | Client Full<br>Name ^ | Unique<br>Identifier | Birth Date | Programs<br>Name | Enroll Date | Exit Date | LOS | Housing<br>Move-in Date | Assigned<br>Staff | Unit<br>Assignment | Occupancy<br>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](mailto:onesf@bitfocus.com) for ongoing questions and unit updates