



ONE System Temporary Shelter Workflow Toolkit

October 2024

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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



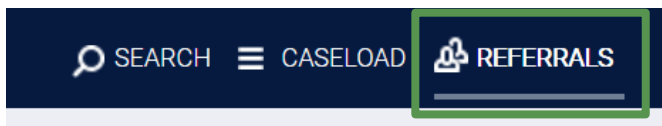
The Referrals tab displays incoming guest referrals. Email alerts can also be configured to alert you via email every time a referral is sent to your site.¹

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.

Pending Referrals

Client	Referral Date	Qualified	Days Pending
Cal Bear Program: Ellis Semi - Congregate Shelter - GF Referred by: TRAIN - Department of Homelessness and Supportive Housing	06/28/2024	No	0 total 0 pending

Referral destination

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**.

The screenshot displays the HSH ONE System interface. At the top, a dark blue header shows 'United Living International'. Below this, a navigation bar includes 'REFERRALS' and a tabbed interface with 'Pending' selected. The 'Pending Referrals' section on the left lists two clients: 'Allie Sebastian' and 'Client Test'. 'Client Test' is highlighted with a green box. The main content area shows the 'Client Test' profile with tabs for 'PROFILE', 'HISTORY', 'SERVICES', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', 'CONTACT', 'LOCATION', and 'REFERRALS'. The 'PROGRAMS' tab is active, displaying 'PROGRAM HISTORY' and 'PROGRAMS: AVAILABLE'. The 'PROGRAM HISTORY' table lists a program: 'Dolores Street Community Services Access Point' with start and end dates. The 'PROGRAMS: AVAILABLE' section lists two programs: 'Hope Hall Shelter Program' and 'Proctor Place Apartments'. The 'Hope Hall Shelter Program' is highlighted with a green box, and a green arrow points to its dropdown arrow icon.



- 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].

Client Test

[PROFILE](#)
[HISTORY](#)
[SERVICES](#)
[PROGRAMS](#)
[ASSESSMENTS](#)
[NOTES](#)
[FILES](#)
[CONTACT](#)
[LOCATION](#)
[REFERRALS](#)

HOUSING AVAILABILITY:

▶ Households without children
11 Beds in 11 Units

1 pending referral(s). Oldest 0 days.

2 ☒ Program Placement a result of Referral provided by United Living International

Include group members:

3 ☐ Domino Halgrim

PRINT DIRECTIONS

4 ENROLL



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.

Include group members:

☒ Domino Halgrim

- Select 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 – Self-Enrollment Sites ONLY

Overview

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 August 2024, this *only* applies to Dolores Shelter and Kinney Hotel Stabilization Rooms.

Step by Step

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

The screenshot shows the 'Client Test' profile page in the HSH ONE System. The 'PROGRAMS' tab is selected, showing 'PROGRAM: HOPE HALL SHELTER PROGRAM'. A green box highlights the 'ADD UNIT/BED' button in the top right corner. A green arrow points from this button to a pop-up window titled 'ADD UNIT/BED'. The pop-up window contains the following fields and controls:

- Start Date:** 08/29/2023 4:00 PM (with a clock icon for selection)
- End Date:** (with a clock icon for selection)
- Eligibility Override:** A toggle switch currently turned off.
- Available Units/Beds:** A dropdown menu showing 'Select...'.
- Current Instance time:** 08/29/2023 3:52 PM
- Buttons:** 'ADD' and 'CANCEL' at the bottom.

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

Overview

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.

Step by Step

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

REFERRALS

SEARCH CASELOAD REFERRALS

REFERRALS

Dashboard Pending Community Queue Analysis Completed Denied Sent Availability Unit Queue Open Units


Pending Referrals

Search Mode Standard

Sort By Default Characteristic -- Select --


Eligible Clients Only


SEARCH

Client	Referral Date	Qualified	Days Pending
 Program: Baldwin Navigation Center Referred by: Department of Homelessness and Supportive Housing	07/30/2024	No	0 total 0 pending

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.

Current Status Pending 

Status Date 07/31/2024 

New Status

Private ☐






Pending
Pending - In Process
Denied
Expired

SAVE CHANGES CANCEL



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

Status Date	07/31/2024 
New Status	Denied 
Send to Community Queue	No 
Denied By Type	Client 
Denied Reason	Client refused services 
Denial Information	<div>Client came to shelter but stated they did not want to stay</div>

Then click **Save Changes** to complete the denial.



Exit Client from a Program



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

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, 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

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].

PROGRAM: HOPE HALL SHELTER PROGRAM

ADD UNIT/BED +

3

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

Unit	Start Date	End Date
1 Bed 001 Hope Hall, Hope Hall Navigation Center	08/29/2023 4:00 PM	

2

EDIT UNIT

Start Date 08/29/2023 4:00 PM

End Date

SAVE CHANGES

August 2023

Su Mo Tu We Th Fr Sa

1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30 31

Hour 12 AM

Minute 00

Now Done

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.



Change the Status of a Bed

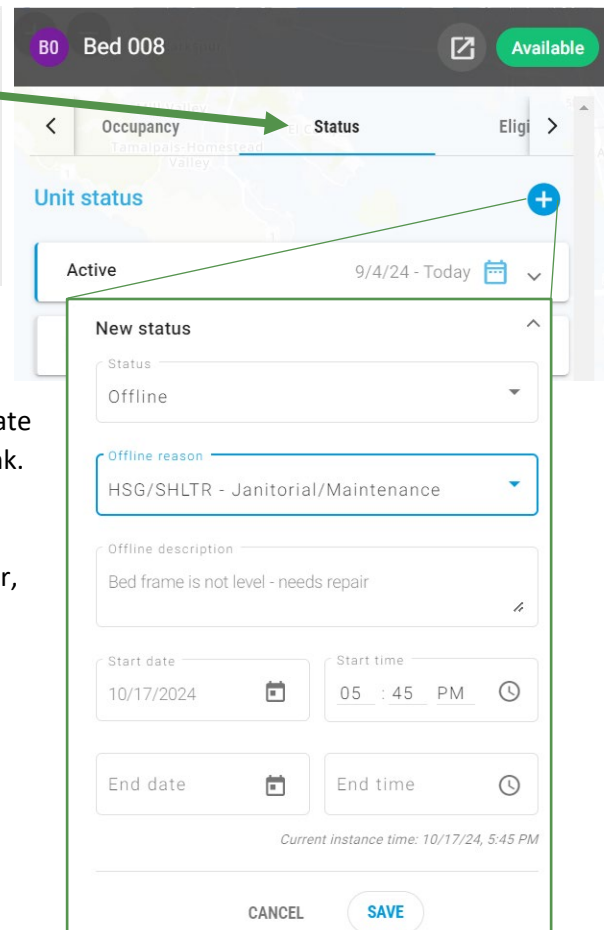
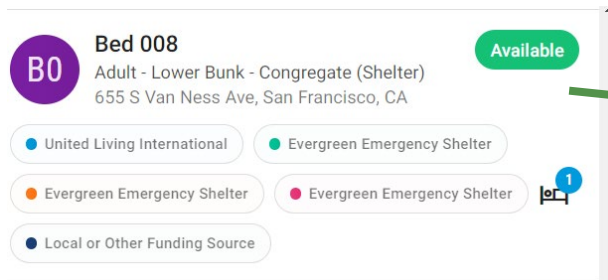
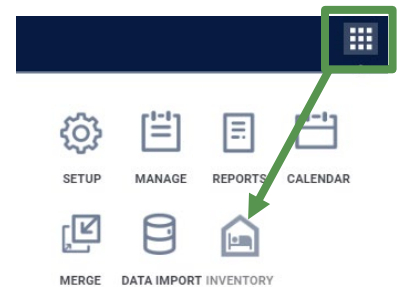
Overview

If a bed needs repairs, cleaning, or is otherwise temporarily unavailable, the bed status can be set Offline. Any time a bed is unavailable for a client to occupy right away, it should be set to Offline. Changing bed status is done on the Inventory Dashboard. Once the bed is ready for occupancy, you can end the Offline period to make it Available.

Step by Step

Make a Unit or Bed Offline

1. Go to the **Inventory Dashboard**, which can be found under the waffle tool.
2. Select the Building by using Building filter at the top of the page.
3. Select the appropriate unit to see the unit's pop-up display card. Click the **Status** button, then find the (+) to add an offline status.

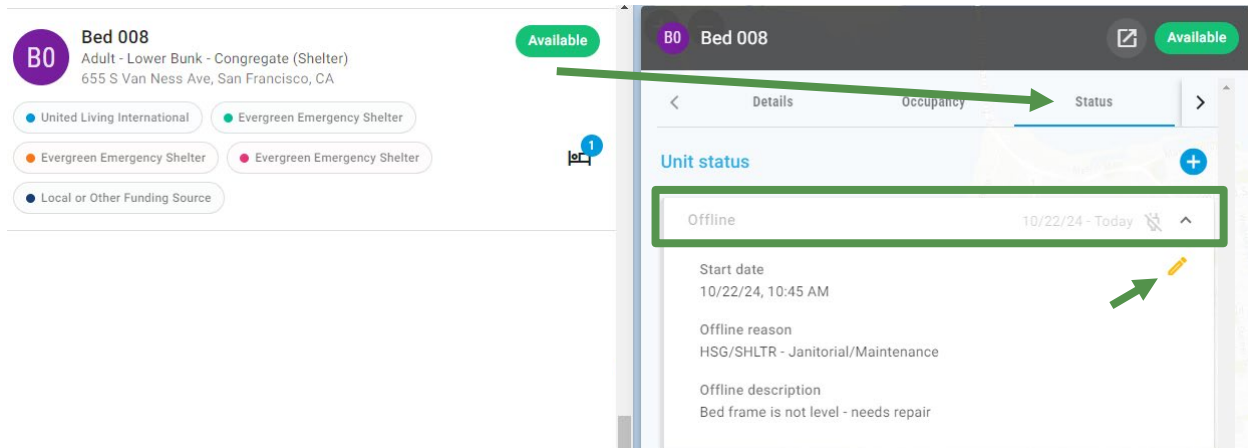


4. Select **Offline** under **New Status** (do not use Inactive). Select the appropriate offline reason and add in any needed notes. Select the appropriate Start date and Start time. Leave the **End date** blank. Click **Save**.
 - Note: If you know when the bed will become available, you can enter an End Date. However, note that the bed will automatically become available at that time. If there is a chance the bed will not be ready for occupancy, do not enter an End Date to avoid the possibility of a guest referral without a vacant bed.



Make a Unit or Bed Available

1. When a unit is ready to be Available, you need to **end the Offline status**. Open the **Status** section again. Find the most recent **Offline Status**, which will be grey. Click the status entry to expand:



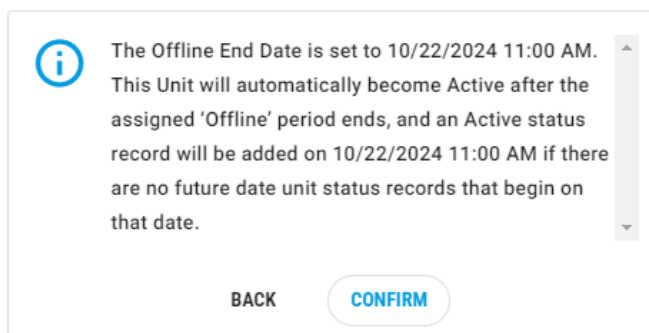
2. Select the yellow pencil tool to **edit** this Offline status.

The screenshot shows the 'Offline' status edit form. The 'End date' and 'End time' fields are highlighted with a green box. The 'End date' is set to '10/22/2024' and the 'End time' is set to '11 : 00 AM'. The 'Status' is set to 'Offline', the 'Offline reason' is 'HSG/SHLTR - Janitorial/Maintenance', and the 'Offline description' is 'Bed frame is not level - needs repair'. The 'Start date' is '10/1/2024' and the 'Start time' is '09 : 00 AM'. The 'Current instance time' is '10/22/24, 11:06 AM'. The 'SAVE' button is highlighted with a green box.

3. Add an **End date** and **End time** to the Offline status. When the end time has passed, the bed will revert to Available.
 - Note: choosing a time that has already passed will update the status immediately.



4. When you press Save, a pop-up will prompt you to confirm that this will set the unit to Active. Select **Confirm**. The unit will now be Available.



The Offline End Date is set to 10/22/2024 11:00 AM. This Unit will automatically become Active after the assigned 'Offline' period ends, and an Active status record will be added on 10/22/2024 11:00 AM if there are no future date unit status records that begin on that date.

BACK CONFIRM

Data on offline reasons is included in reporting and decision-making, so it is important to select the most accurate and appropriate reason when marking a bed offline.

Offline Reason Name	Definitions
Automatically Set to Offline	The unit or bed was automatically set to offline with this reason by the system when the previous household was exited from the program. <i>Note that congregate shelters do not have this status.</i>
HSG/SHLTR – Janitorial/Maintenance	The unit or bed is unavailable for client placement due to janitorial or maintenance needs.
HSG/SHLTR – Property Hold	The unit or bed is unavailable due to a property hold. This status can be used for management needs that are not covered by other offline reasons. Always include notes explaining the circumstance.
SHLTR – Hospital Hold	The unit or bed is held for a client who is temporarily at a health care facility.
SHLTR – Jail Hold	The unit or bed is held for a client who is temporarily incarcerated.

Important Notes

In cases where a client is occupying a bed that needs repairs, the process for [Transferring a Client to a New Bed](#) (page 10) should be followed to transfer the client to another unit. The bed in need of repair should then be set Offline following the process described above.

If a unit needs to be set to permanently offline, please contact your HSH Program Manager to have the status set to Inactive. Do not set units to Inactive without contacting HSH.

If a bed remains offline but the reason for it being offline changes, a new offline status should be added to ensure the history of the bed is accurately recorded. For example, if a bed is under a jail hold and then is unavailable due to repairs, each window of time should be reflected in a unique offline status.



Review Reports for Accuracy



New and updated reports are available in ONE.



Check rosters to ensure accuracy.

Overview

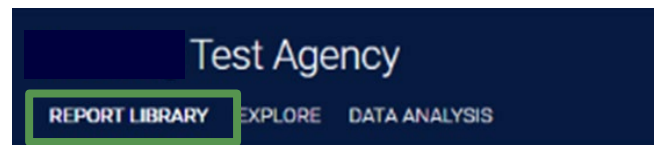
Review rosters often to ensure that the information in ONE is accurate. To confirm that clients are associated with their current units or beds in ONE, review the **Program Roster Report**, which includes the unit numbers associated with a client's program enrollment. Additional helpful reports can be 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**.

Step by Step

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.



Program Based Reports

22 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 bed information, or select the PDF version that includes both the program and unit.

REPORT LIBRARY

Program Based Reports > [GNRL-106] Program Roster

Program(s)

- All
- Hope Hall Shelter Program
- Proctor Place Apartments
- Prop C RRH

Status

HoHs Only? ☒ No ☐ Yes

Report Date Range 08/29/2023 – 08/29/2023

Report Output Format ☒ Web Page ☐ PDF - Program ☐ PDF - Program and Unit ☐ Excel

SUBMIT

- 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

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.



Department of Homelessness and Supportive Housing

REPORT LIBRARY EXPLORE DATA ANALYSIS

DATA ANALYSIS

Built In Reports 0 report(s) v

San Francisco ONE System Reports 70 report(s) ^

***Inventory - Temporary Shelter**

Temporary Shelter Bed Assignments and Statuses RUN

Temporary Shelter Bed/Unit Roster RUN

Temporary Shelter Client Roster RUN

Temporary Shelter Open Bed/Unit Report RUN

- 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	0	120	0
6	0	197	0
2	20	42	0
8	0	178	0



3. Inventory – Temporary Shelter Bed/Unit Roster

- Under the waffle tool, select **Reports**. Select the **Data Analysis** tab.
- Select **San Francisco ONE System Reports** to expand the menu. Under ***Inventory – Temporary Shelter**, select the **Temporary Shelter Bed/Unit Roster** report.

Department of Homelessness and Supportive Housing

REPORT LIBRARY EXPLORE **DATA ANALYSIS**


DATA ANALYSIS

Built In Reports 0 report(s) ▾

San Francisco ONE System Reports 70 report(s) ▴

***Inventory - Temporary Shelter**

Navigation Center Bed Assignments and Statuses	▶ RUN
Temporary Shelter Bed Assignments and Statuses	▶ RUN
Temporary Shelter Bed/Unit Roster	▶ RUN
Temporary Shelter Client Roster	▶ RUN
Temporary Shelter Open Bed/Unit Report	▶ RUN

- 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	- (link)	2023-08-17	
2	Bed 002	Adult- Single Bed	Available	ⓘ	ⓘ	ⓘ	ⓘ	ⓘ	
3	Bed 003	Adult- Single Bed	Occupied	ⓘ	Juan Marichal	00027	- (link)	2023-08-28	
4	Bed 004	Adult- Single Bed	Available	ⓘ	ⓘ	ⓘ	ⓘ	ⓘ	
5	Bed 005	Adult- Single Bed	Occupied	ⓘ	Barry Bonds	00025	- (link)	2023-07-18	

4. Inventory – Temporary Shelter Client Roster

- Under the waffle tool, select **Reports**. Select the **Data Analysis** tab.
- Select **San Francisco ONE System Reports** to expand the menu. Under ***Inventory – Temporary Shelter**, select the **Temporary Shelter Client Roster** report.

Department of Homelessness and Supportive Housing

REPORT LIBRARY EXPLORE DATA ANALYSIS

DATA ANALYSIS

Built In Reports 0 report(s) ▾

San Francisco ONE System Reports 70 report(s) ▲

***Inventory - Temporary Shelter**

Navigation Center Bed Assignments and Statuses	▶ RUN
Temporary Shelter Bed Assignments and Statuses	▶ RUN
Temporary Shelter Bed/Unit Roster	▶ RUN
Temporary Shelter Client Roster	▶ RUN
Temporary Shelter Open Bed/Unit Report	▶ RUN

- 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

