ONE System Temporary Shelter Workflow Toolkit
New Inventory Features

September 2023

Contents

Context

Inventory in the ONE System allows for more precise tracking of beds for Temporary Shelter. For the time being, the only changes to the referral and bed management workflow are those identified below. All other activities in ONE remain the same. As you use this guide, please note that in the context of Temporary Shelter, “units” are the system equivalent of “beds” in the ONE System interface.

What Inventory Does

Inventory in ONE is:

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

Inventory is not:

- A new or separate platform
- A complete overhaul of the ONE System
- A new approach to the Homelessness Response System or Coordinated Entry

Using Inventory in ONE helps with the following:

- Streamlines workflows and better serves clients
- Provides better and more timely information to HSH and the community about which beds are unoccupied, for how long, and why
- Supports reconciliation and communication by being a reliable source of truth
- Provides more transparency into the overall Temporary Shelter portfolio

Accept and Enroll Client in Program

Enroll a client the day that they arrive on site. If they do not arrive, deny the referral the next morning.

Pay attention to following appropriate steps for households.

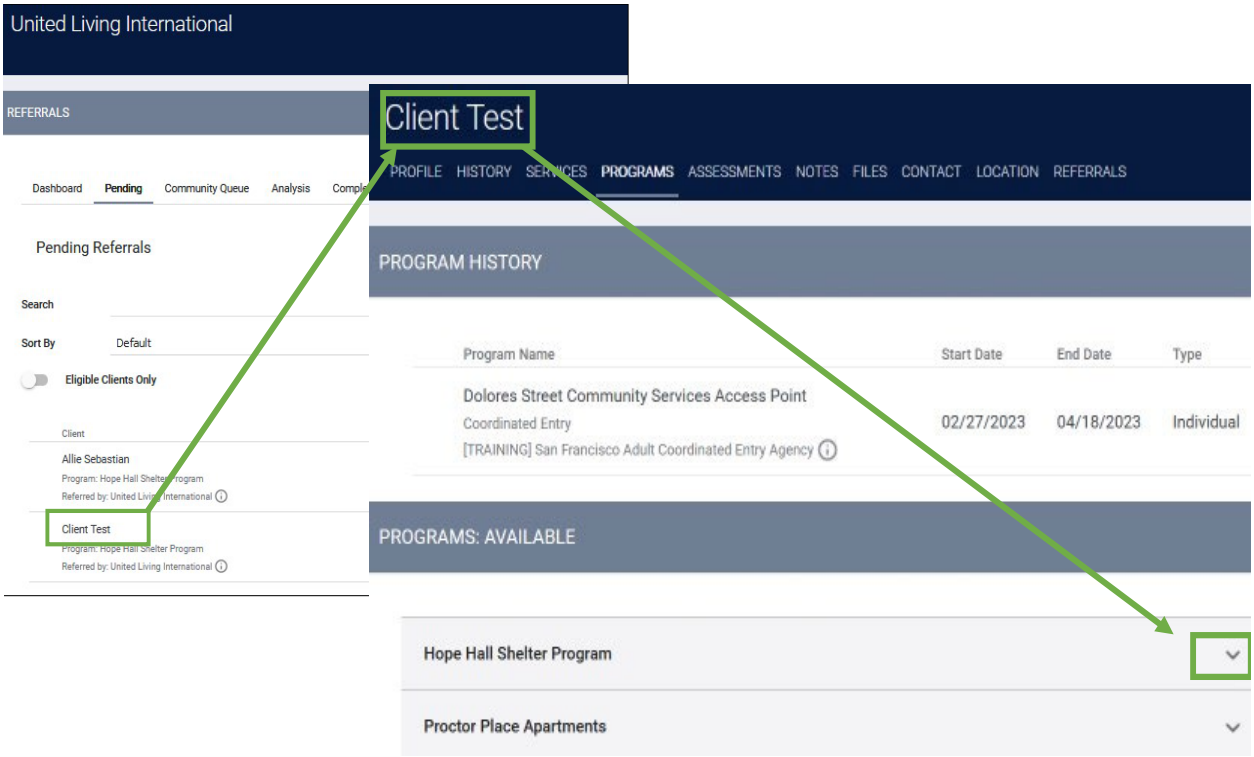
Overview

Select the appropriate client and navigate to the **Programs** tab. 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.

Step by Step

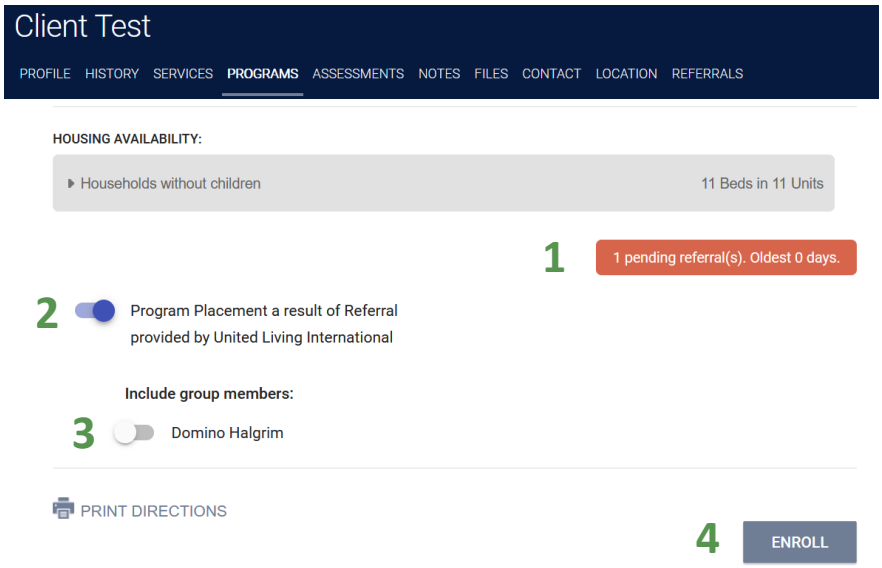
1. Open the client profile and click into programs. Under **Programs: Available**, click on the appropriate program to expand. You can access the referral record here by clicking on the pencil icon next to the referral record in the list.

   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.

   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].



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

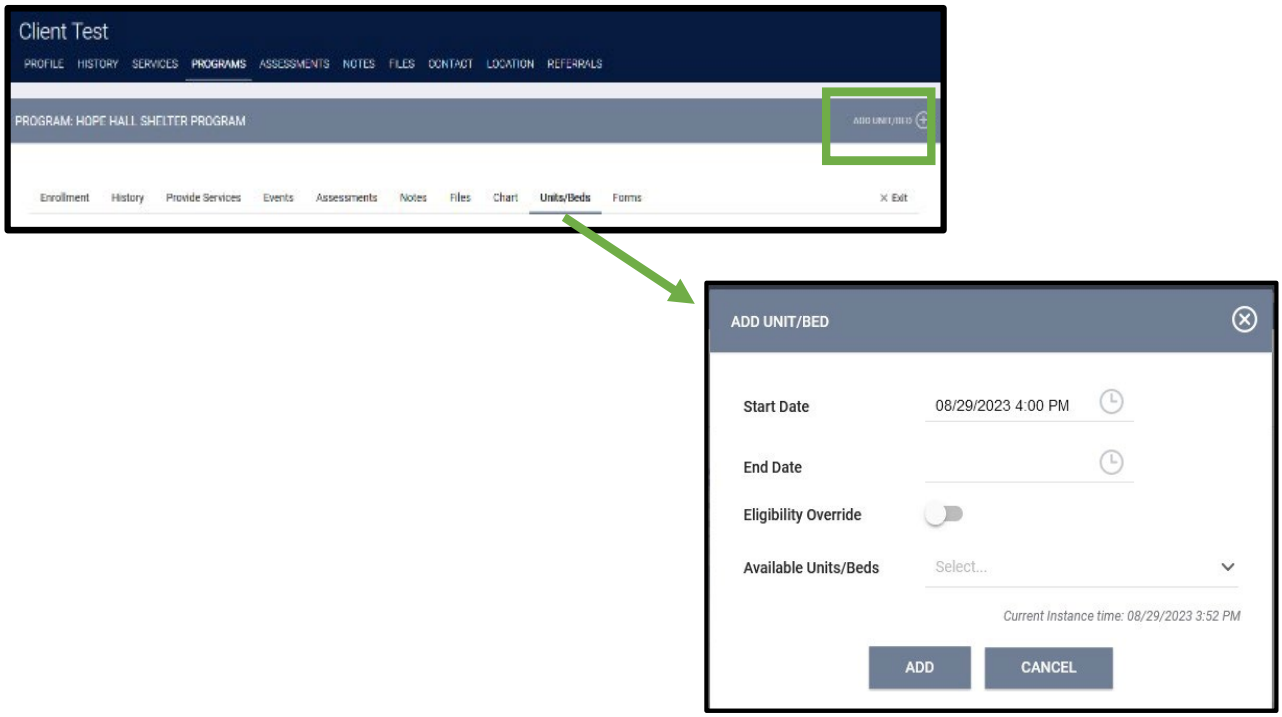
New step!

Overview

Under the program tab in the appropriate client, click 'Add Unit' on the right side of the screen. Select the start date, and leave the end date and eligibility override sections as is. Under 'Available Units' start by selecting **Client Profile Only**, then the appropriate bed or unit from the available options. All enrolled clients should be associated with a bed or unit number.

Step by Step

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.

Exit Client From a Program

New automated functionality: Exiting a client from a program also exits them from their bed.

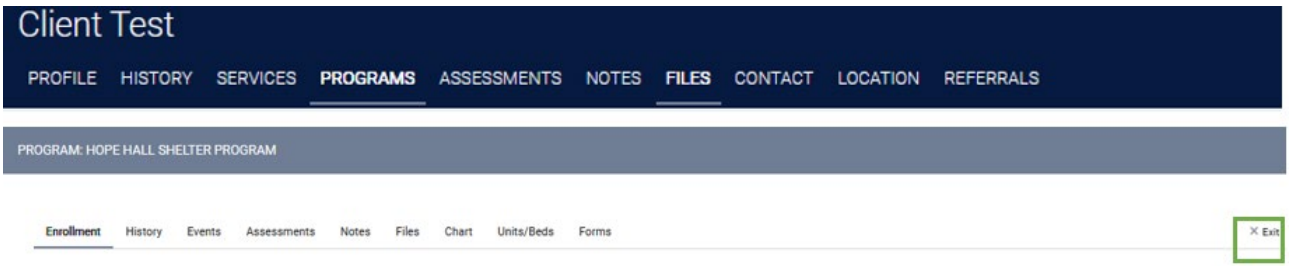
Update ONE before 8 am the day after a client exits.

Overview

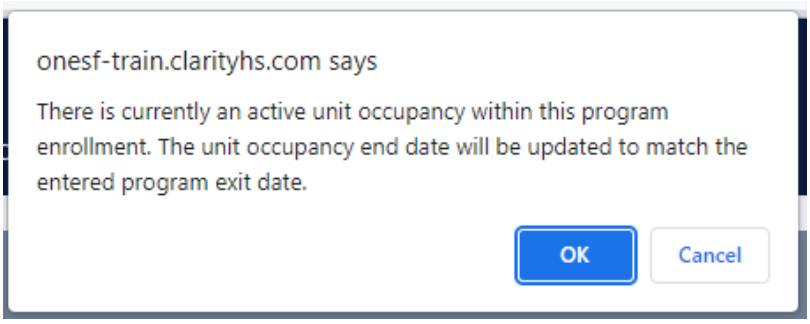
Exiting a client from the program will also exit a client from their assigned bed or unit. Exit the client from the program by selecting the appropriate client, navigating to the program, and choosing 'Exit'.

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

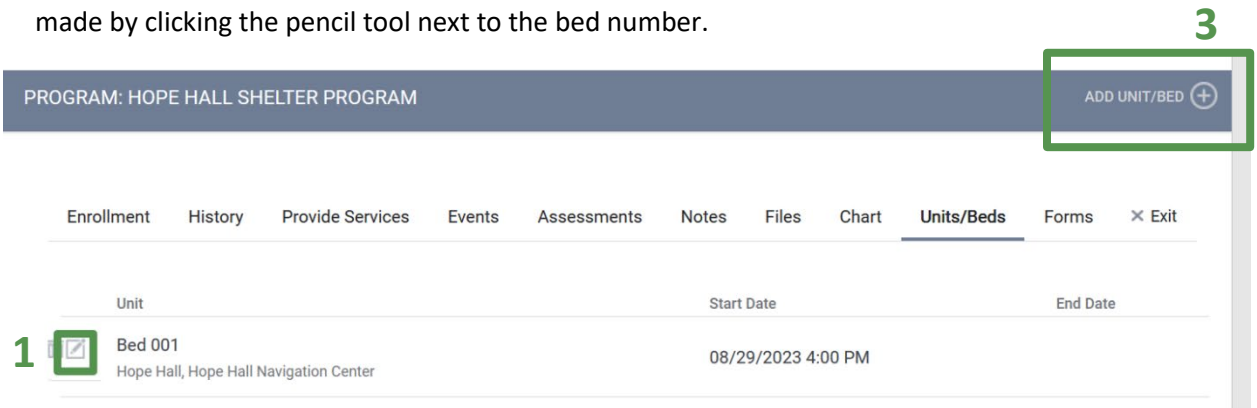
New Step!

Overview

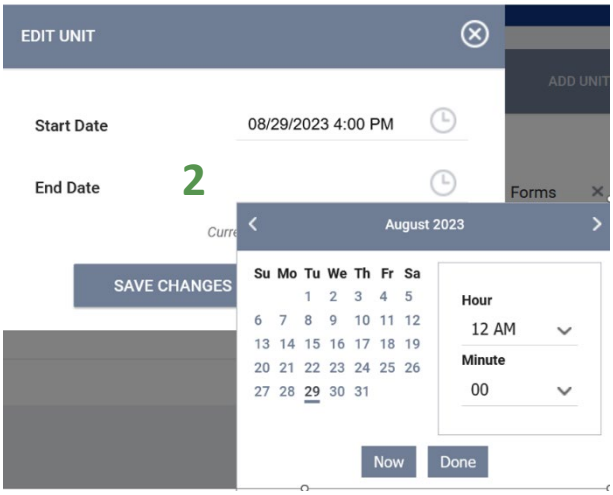
When a client needs to switch bed , begin by searching for the client. Open their profile, select Programs, then the appropriate program. From there, navigate to the unit tab under the program tab. Open the unit, and select an end date for their occupancy in that unit. Then assign the client to a new bed or room following the same process as a new move-in. Under the program tab in the appropriate client, click 'Add Unit' on the right side of the screen. Select the start date and leave the end date empty. Under 'Available Units' select Client Profile Only and select the bed the client moved to.

Step by Step

1. In cases when clients need to transfer beds, either temporarily or permanently, changes can be made by clicking the pencil tool next to the bed number.



2. An end date and time must be entered. Be sure to hit the Save Changes button.
3. Stay on the Units/Beds tab and select the **Add Unit/Bed** tool to assign a new bed.
4. In the pop-up window, fill in the start date. Under **Available Units**, select the correct bed, and confirm to assign the client in their new bed.



Review Reports for Accuracy

New and updated reports are now available in ONE.

Check rosters weekly to ensure accuracy.

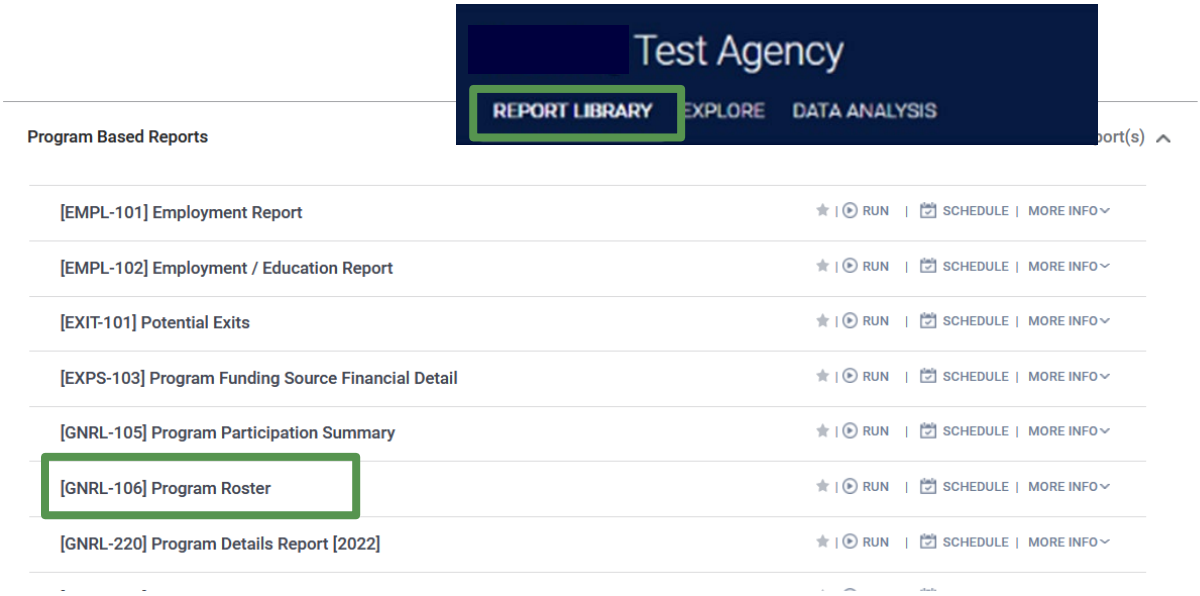
Overview

Review rosters weekly or more 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**.

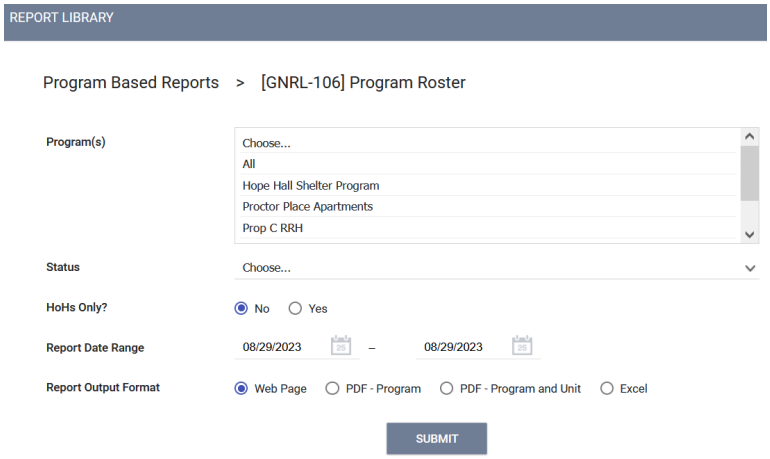
Step by Step

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

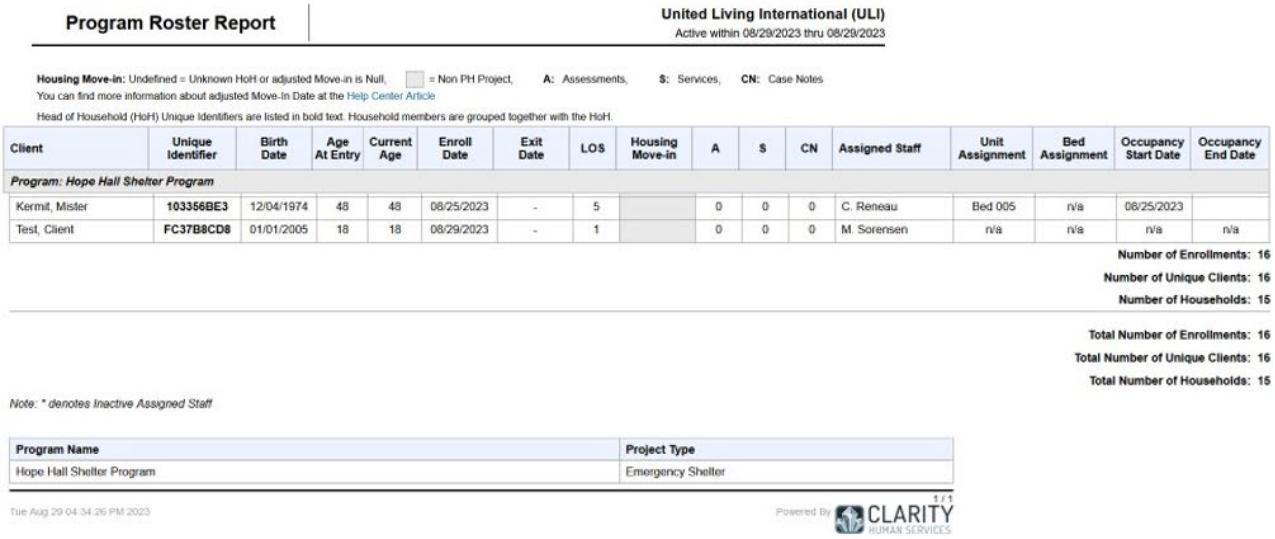
1. **Program Roster**
    a. Under the waffle tool, select **Reports**.
    b. Under the **Report Library,** expand **Program Based Reports**. Find **Program Roster**, and click to run.



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 of 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

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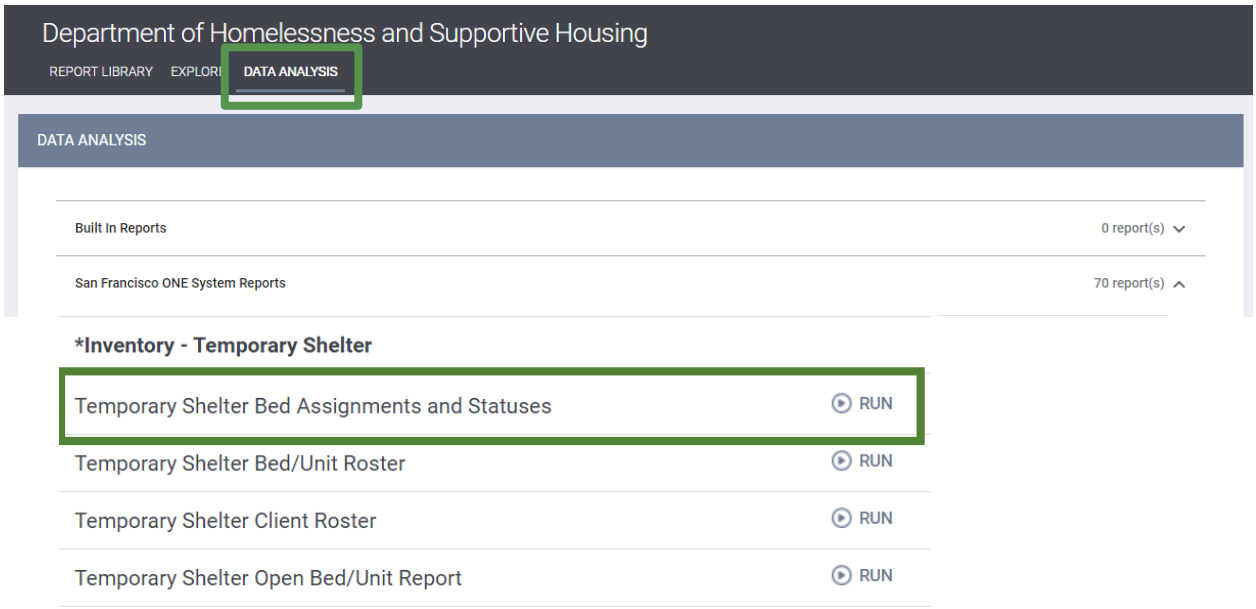
2. Inventory – Bed Assignments and Statuses

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	Ø	120	Ø
6	Ø	197	Ø
2	20	42	Ø
8	Ø	178	Ø