



DEPARTMENT OF
HOMELESSNESS AND
SUPPORTIVE HOUSING

ONE System Inventory

Temporary Shelter (Round 1) Launch & Training – Sites that accept Guest Placement referrals



Goals for today

- By the end of this session, we'll have a shared understanding of:
 - What Inventory does
 - How the new functionality will appear in your day-to-day work
 - Changes to your current workflow
 - How to get help if you have questions



What Inventory Is and Isn't

Inventory *is not*:

- An entirely new platform or an overhaul of the ONE System

Inventory *is*:

- A way to match the clients in the ONE System to the beds that they are sleeping in
- A way to track and view the current status of each bed in your shelter
- Allowing us to phase out the use of RTZ and dual-enrollments





INVENTORY

Temporary Shelter

Agenda

- Overview of Inventory
- Workflow
- Referrals
- Bed/Unit Assignment
- Exits
- Reports



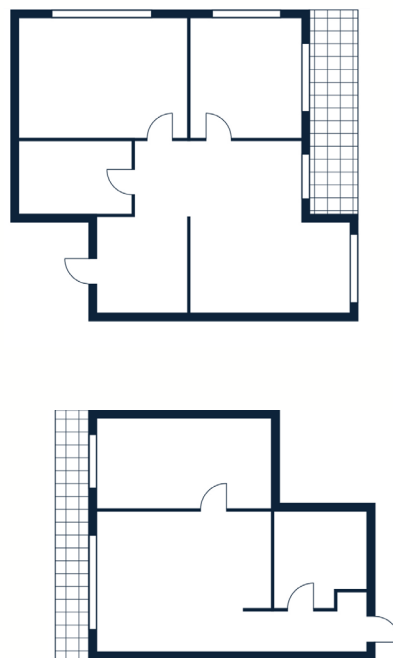


WHAT IS INVENTORY?



ONE System INVENTORY Overview

Sites » Buildings » Unit Configurations » Beds » Units

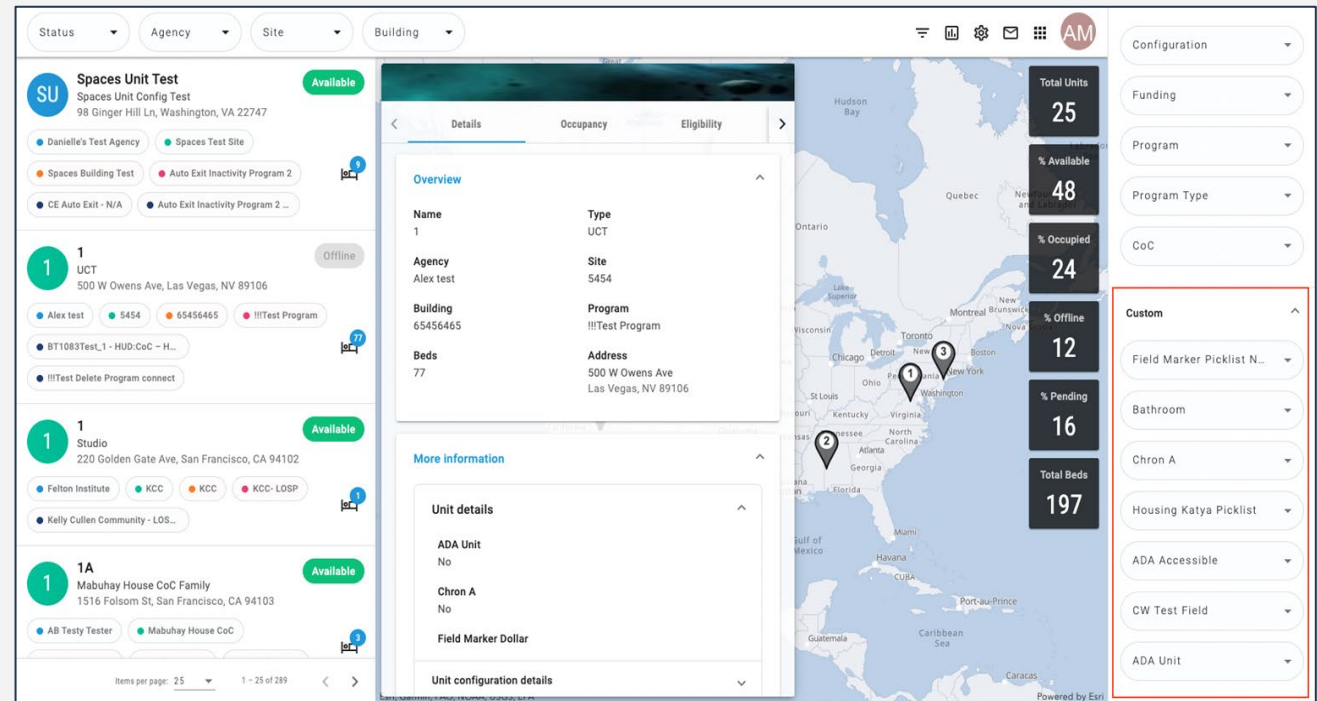


INVENTORY DASHBOARD



INVENTORY Module Dashboard

- Visual view of unit details and locations
- Filters can be used to control what information is viewed



INVENTORY Display Cards

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

The screenshot displays the INVENTORY Display Cards interface. On the left, a list of units is shown with filters for Status, Agency, Site, and Building. The units listed are:

- Unit 10: Adult PSH - SRO-SharedBath, 2791 16th St, San Francisco, CA 94103. Status: Pending Occupancy.
- Unit 100: Adult PSH - SRO-Shared Bath-LOSP+MHSA, 990 Polk St, San Francisco, CA 94109. Status: Available.
- Unit 101: Adult PSH - SRO-SharedBath, 459 Turk St, San Francisco, CA 94102. Status: Available.

On the right, a detailed view of Unit 100 is shown, including its Overview, Agency, Site, Building, Program, Beds, Address, and More information. The map on the right shows the location of the units in San Francisco, with markers for each unit.

Unit 100 Details:

Field	Value
Name	100
Type	Adult PSH - SRO-Shared Bath-LOSP+MHSA
Agency	[Training] Lutheran Social Services of Norcal
Site	[Training] Lutheran Social990 Polk
Building	990 Polk
Program	990 Polk - LOSP + MHSA
Beds	1
Address	990 Polk St San Francisco, CA 94109

More information:

Field	Value
ADA	No
Accessible for Wheelchair	No
Bariatric Beds	No
Bedside Outlet	No
Higher Bed	No

Map Summary:

Metric	Value
Total Units	25
% Available	92
% Occupied	0
% Offline	0
% Pending	8
Total Beds	25

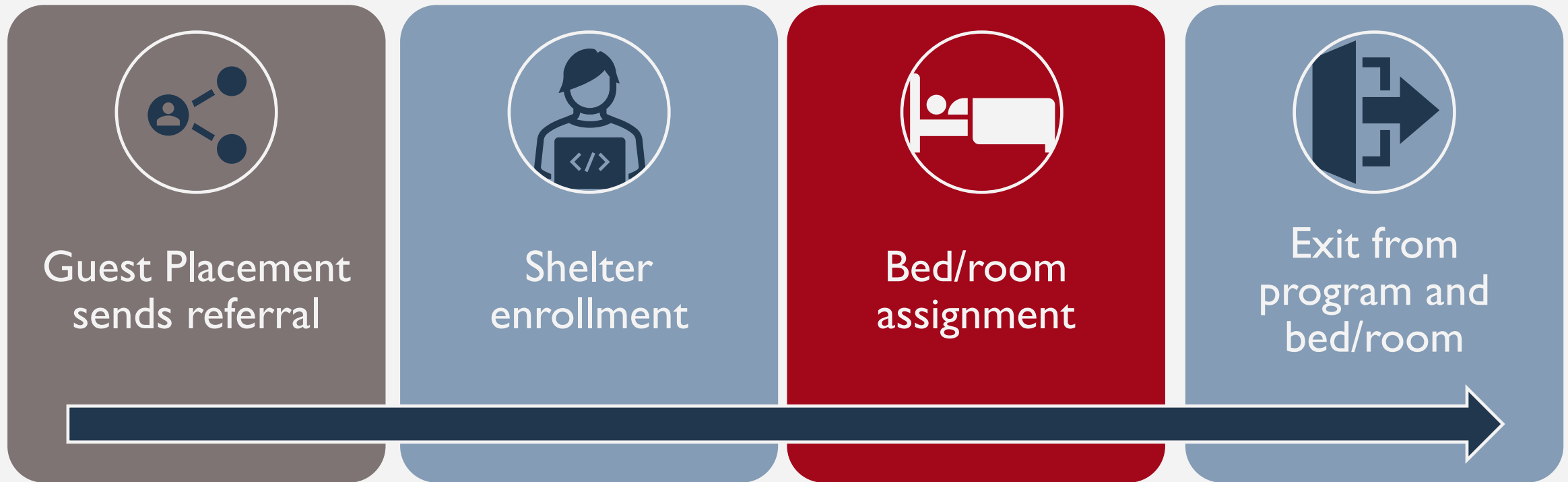




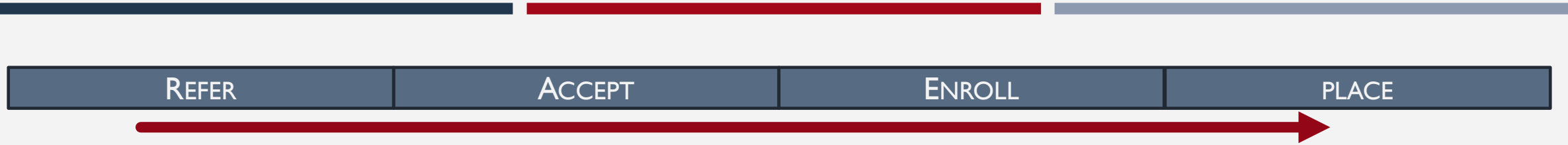
TEMPORARY SHELTER WORKFLOW



Temporary Shelter Workflow



Will launch with this workflow on Monday, 9/18



REFERRAL AND PLACEMENT STEPS



REFER

ACCEPT

ENROLL

PLACE

Referral from Guest Placement

- Guest Placement sends a *Direct Referral*
- 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

Default

Mode

Standard

Characteristic

-- Select --

Eligible Clients Only

SEARCH

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

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

1=

: =



REFER

ACCEPT

ENROLL

PLACE

Pending Tab

- Contains referrals still in process for the user's agency
- Filter by program name, referral date, client name or referring agency
 - Usually, filter by **program**

The screenshot displays the 'REFERRALS' section with the 'Pending' tab selected. The interface includes a navigation bar with tabs: Dashboard, Pending, Community Queue, Analysis, Completed, Denied, Sent, Availability, and Open Units. Below the tabs, there is a 'Pending Ref' section with a search bar and a 'Sort By' dropdown menu. The 'Sort By' dropdown is open, showing options: Default (selected), Program Name, Client Name, Date of Referral, and Referring Agency. To the right of the search bar, there are two dropdown menus: 'Mode' set to 'Standard' and 'Characteristic' set to '-- Select --'. At the bottom left, there is a toggle switch for 'Eligible Clients Only'. A 'SEARCH' button is located at the bottom right.



Denied 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, client refused services, etc.
 - Must provide additional details

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	



REFER

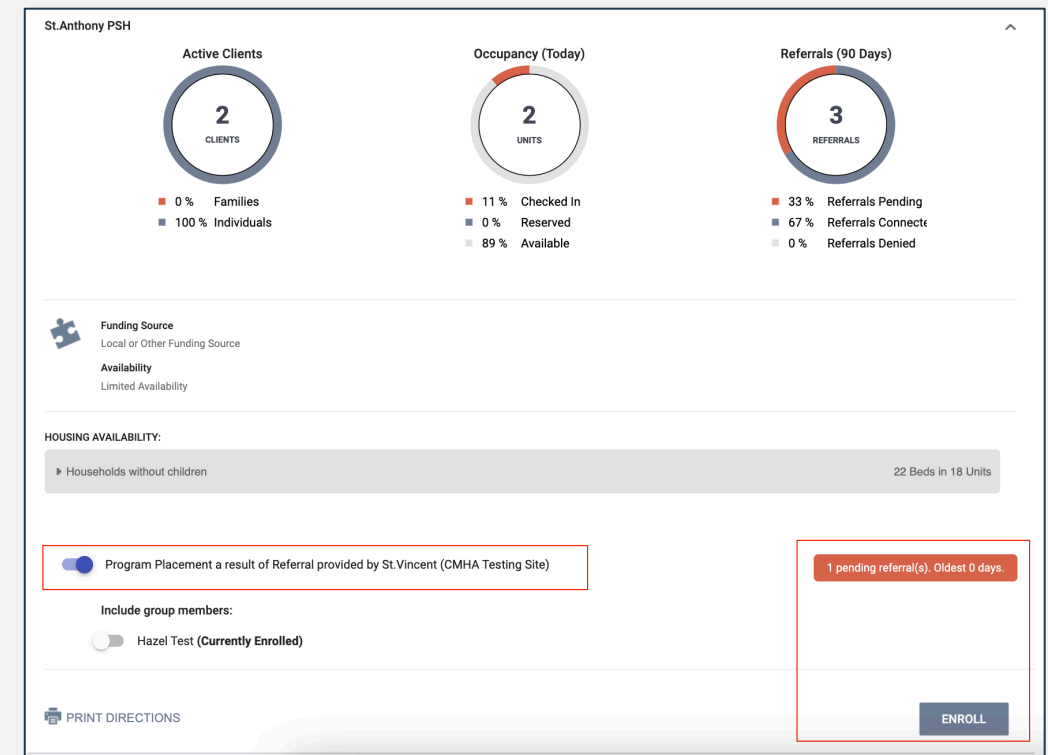
ACCEPT

ENROLL

PLACE

Accepting Referrals

- Enrolling the client also completes the referral
 - The "Program Placement a result of..." toggle **must** be enabled
 - The orange pending referral box lets you know you're enrolling into the correct program



REFER

ACCEPT

ENROLL

PLACE

Enrollment

Do you have a partner or spouse?	Select	▼
Do you have more than 2 bags?	Select	▼
Do you have any special accommodations?	Select	▼
REFERRAL SOURCE		
What is the guest referral source?	Transfers from Another Site	▼
Site type	Adult and TAY Shelter Sites	▼
Adult and TAY Shelter Sites	711 Post Shelter	▼
Reason for transfer	Life safety transfer	▼
LOCATION CLIENT SLEEPS AT WHEN NOT NAVIGATION CENTER		
Where do you usually sleep? (Address when not at Navigation Center)		
Do you have other places you sleep? (Addresses or Locations)		
Outreach Location	ADD LOCATION	
PRIOR LIVING SITUATION		
Type of Residence	Data not collected	▼

- Collect as much information as possible
- Referral source is indicated in the Referral Notes
- Avoid using “Client Refused” or “Data not Collected” whenever possible



REFER

ACCEPT

ENROLL

PLACE

Bed/Room Assignment

- Under the Unit/Bed Tab
- Complete at the time of enrollment
- Only the head of household is assigned to the unit

Allie Sebastian

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

PROGRAM: HOPE HALL SHELTER PROGRAM

ADD UNIT/BED (+)

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

✕ Exit



REFER

ACCEPT

ENROLL

PLACE

Bed/Room Assignment

- Add Start Date
- Leave End Date blank
- Click Available Units
 - Click Client Profile and select the unit the client was referred to

ADD UNIT/BED

Start Date 08/23/2023 2:00 PM

End Date

Eligibility Override

Available Units/Beds Select...

Client Profile Only

- Bed 003 (Hope Hall, Hope Hall Navig...
- Bed 004 (Hope Hall, Hope Hall Navig...
- Bed 005 (Hope Hall, Hope Hall Navig...
- Bed 006 (Hope Hall, Hope Hall Navig...
- Bed 008 (Hope Hall, Hope Hall Navig...
- Bed 11 (Hope Hall, Hope Hall Navigat...
- Bed 12 (Hope Hall, Hope Hall Navigat...



Enrollment Sidebar

- Once the client is assigned to a unit, the unit number is visible in the enrollment sidebar

104 DAYS
ACTIVE PROGRAM

Program Type:	Individual
Program Start Date:	07/06/2022
Assigned Staff:	Melissa Wheeler
Head of Household:	Randall Hall <input type="checkbox"/>
Unit Name:	104



TRANSFERRING UNITS/BEDS




Transferring Units/Beds

- Staff can move clients to a different unit/bed
- Completed under the Unit/Bed Tab
- Add an end date to the current unit

PROGRAM: HOPE HALL SHELTER PROGRAM ADD UNIT/BED +

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

Unit	Start Date	End Date
 Bed 001 Hope Hall, Hope Hall Navigation Center	05/23/2023 11:45 AM	

Edit

EDIT UNIT ×

Start Date 05/23/2023 11:45 AM 🕒

End Date 08/22/2023 5:00 PM 🕒

Current Instance time: 08/23/2023 2:11 PM

SAVE CHANGES CANCEL



Transferring Units/Beds

- Add Unit to create a stay in the new unit
- Start date for the new bed should not overlap with the end date for the old bed (the system will not let you save)

PROGRAM: JEFFERSON HOTEL - GF

ADD UNIT +

Enrollment

History

Provide Services

Assessments

Notes

Files

Units

Forms

× Exit

Unit	Start Date	End Date
106 Jefferson Hotel, Jefferson Hotel	08/03/2022	08/03/2022
105 Jefferson Hotel, Jefferson Hotel	07/11/2022	07/12/2022

ADD UNIT +

ADD UNIT ×

Start Date

07/18/2022

25

End Date

__/__/__

25

Eligibility Override

☐

Available Units

Unit 101 (St.Anthony (PSH), Building 1)

▼

ADD

CANCEL





EXITS



Exiting Client from Unit

- Exits should occur when a client is no longer receiving services
- Exiting a client from a program will automatically exit the client from their bed/room
 - Complete an exit for all household members

Brad Jones

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

PROGRAM: JEFFERSON HOTEL - GF

Enrollment **History** Assessments Notes Files Units Forms

Program Service History

✕ Exit

	Assessments	Notes	Files	Units	Forms
				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





DENIAL OF SERVICE (DOS) WORKFLOW



Immediate Exit Denial of Service Workflow



Non-Immediate Exit Denial of Service Workflow



Non-Immediate Exit DoS Services

- Helpful for tracking specific Non-Immediate Rule violations by guest
- Can log date of the rule violation, along with additional notes as needed

The screenshot displays a web application interface for managing services. The top navigation bar includes links for PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this, a secondary navigation bar shows Enrollment, History, Provide Services (active), Events, Assessments, Notes, Files, Chart, Units/Beds, and Forms, with an Exit button on the right. The main content area is titled 'Services' and contains a form for logging a 'Rule Violation (Non-immediate Category)'. The form includes a dropdown menu for 'Other' and a list of rule violations. The first violation, 'a) Repeated failure to wear mask for confirmed COVID-19 positive individual in COVID-19 isolation period. Not outright refusal but failure to comply.', is expanded, showing an 'Event Date' of 08/24/2023 and a 'Service Note' field with a rich text editor. Below the list, there are two more collapsed violations: 'b) General threats that lack specificity (e.g., "I'm going to get you").' and 'c) Visible use in any common area, purchase, or distribution of illegal drugs not associated with a prescription, or alcohol.' A 'SUBMIT' button is located at the bottom right of the form.

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

Enrollment History **Provide Services** Events Assessments Notes Files Chart Units/Beds Forms [Exit](#)

Services

Rule Violation (Non-immediate Category) Other ▾

a) Repeated failure to wear mask for confirmed COVID-19 positive individual in COVID-19 isolation period. Not outright refusal but failure to comply. ⌵

Event Date 08/24/2023 📅

Service Note :

B *I* **1/2** **1/2**

SUBMIT

b) General threats that lack specificity (e.g., "I'm going to get you"). ▾

c) Visible use in any common area, purchase, or distribution of illegal drugs not associated with a prescription, or alcohol. ▾



Non-Immediate Exit DoS Service List




- a) Repeated failure to wear mask for confirmed COVID-19 positive individual in COVID-19 isolation period. Not outright refusal but failure to comply.
- b) General threats that lack specificity (e.g., "I'm going to get you").
- c) Visible use in any common area, purchase, or distribution of illegal drugs not associated with a prescription, or alcohol.
- d) Property destruction to a common space that presents a nuisance (graffiti, etc.).
- e) Use of photography, video, or audio recording on site that includes other clients or staff without their permission.
- f) Having unauthorized guests at the shelter.
- g) Having excessive property within the shelter that extends beyond the clients' designated bed area or assigned room.
- h) Verbal harassment, intimidation or bullying of other guests, staff, or volunteers.
- i) Unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature, including nudity.
- j) Other Rule Violation (specify in note)



Denial of Service Exits

- Exits are necessary for all denials of service, whether it be an immediate or non-immediate reason
- Exit Reason = **Rule Violation**
 - New dependent fields
 - Denial of Service – 1=Immediate Denials of Service; 2=Non-immediate Denials of Service
 - Effective Date of Denial of Service
 - Date of Denial of Service Expiration
- This process for recording denial of service replaces old services you may have had in ONE

End Program for client Sam Quatch

Program Exit Date	08/24/2023	
Exit Reason	Rule Violation	▼
Denial of Service	2f Having unauthorized guests at the shelter.	▼
Effective Date of Denial of Service	08/24/2023	
Date of Denial of Service Expiration	11/24/2023	





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

Status	Availability	Description
Active	Available	Unit/bed is available to receive guest.
	Occupied	Guest is living in the unit or bed.
Offline		Unit/bed is temporarily unavailable (e.g., due to needed maintenance).
Inactive		Unit/bed not available for referral for foreseeable future (e.g., used as an office). Please call or email the help desk if a unit needs to be set to inactive or was accidentally made inactive.

Auto-Offline

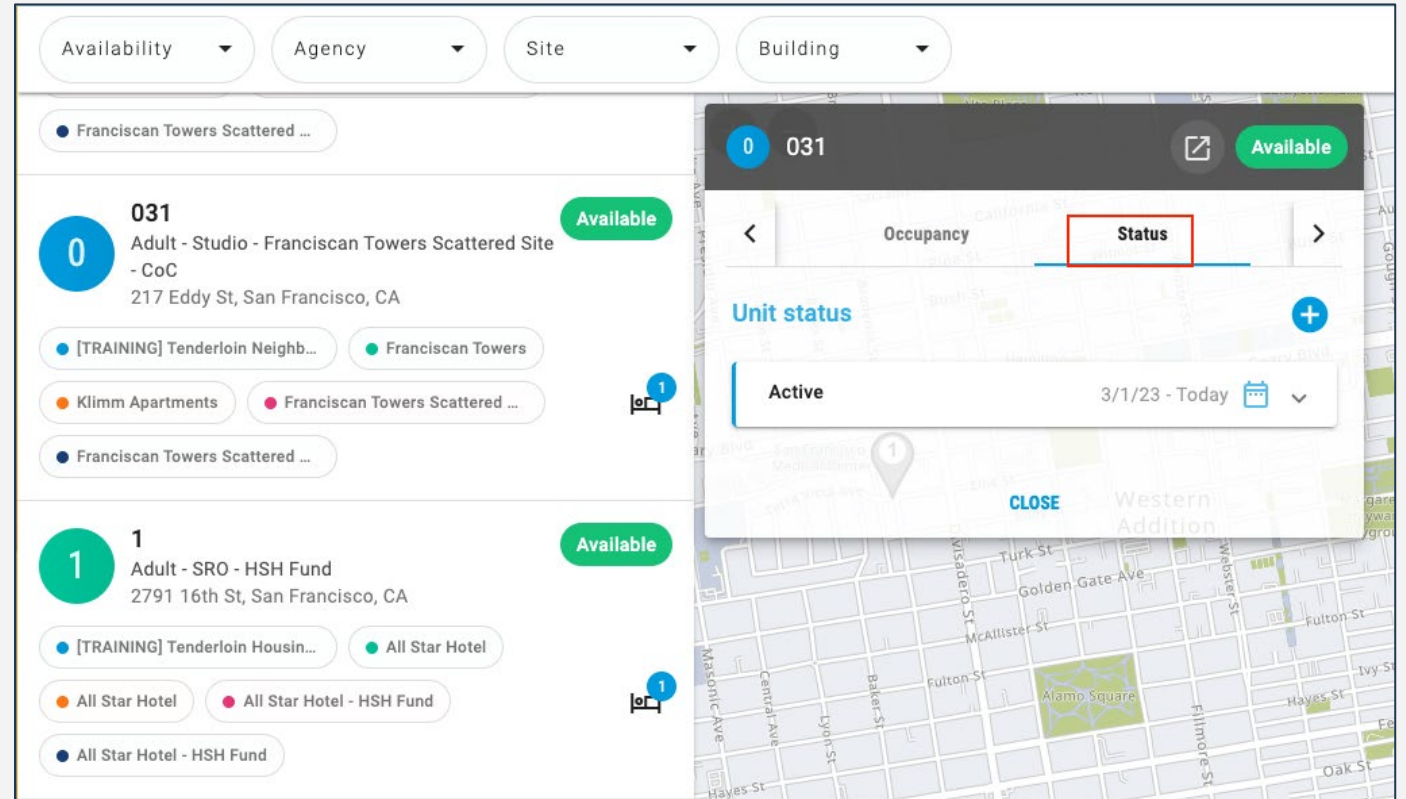
- In some cases, the system will automatically change the unit/bed status to offline after the client is exited

Auto-Offline	Status
Congregate	Will remain active
Semi-Congregate	Will auto-offline for 24 hours
Non-Congregate	Will default to stay offline



Making Units/Beds Offline

- Open the *Display Card* for the unit
- Add *Offline Status* under the *Status Tab*
- **Leave End Date blank**
- Unit Status cannot overlap



Editing/Ending a Unit Offline Status

- The pencil icon can be used to edit or end the offline status
- To make a unit active and available, enter an end date to the current status

The screenshot shows the 'Unit status' screen with a map background. The 'Status' tab is selected. A card displays the current status as 'Offline' for '10/19/22 - Today'. Below this, the 'Start date' is '10/19/22, 4:45 PM', the 'Offline reason' is 'Janitorial/ Maintenance', and the 'Offline description' is 'Test'. A red box highlights a pencil icon next to the 'Offline' status, and another red box highlights the 'Edit status' button.

The screenshot shows the 'Offline' status edit screen. The 'Status' dropdown is set to 'Offline'. The 'Offline reason' dropdown is set to 'Janitorial/ Maintenance'. The 'Offline description' text field contains 'Test'. The 'Start date' is '10/19/2022' and the 'Start time' is '04 : 45 PM'. The 'End date' is '10/20/2022' and the 'End time' is '09 : 15 AM'. A red box highlights the 'End date' and 'End time' fields.





REPORTS



Program Roster

- All staff have access to Program Roster
- Program stay information for selected programs
- Now 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

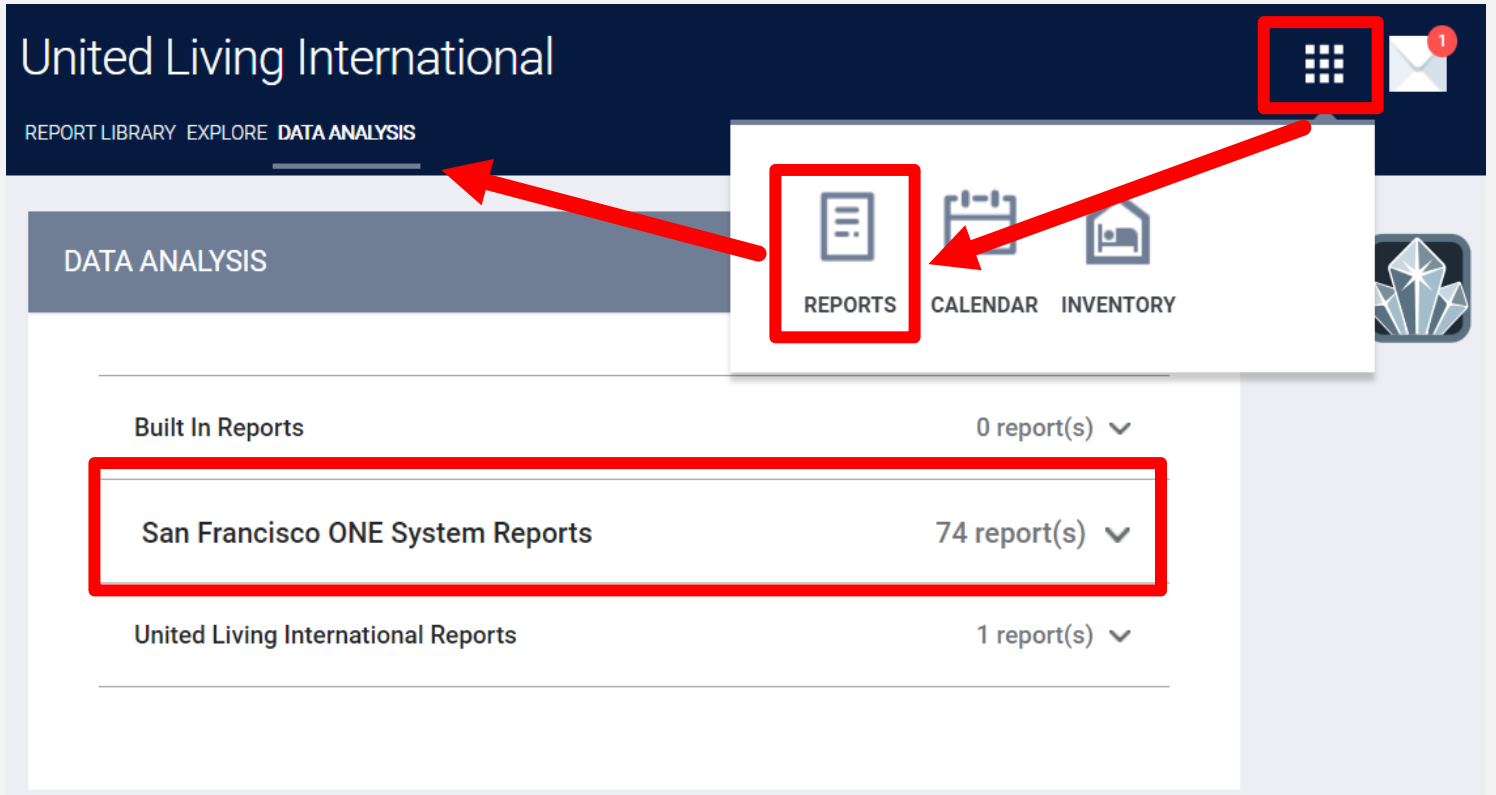
Total Number of Households: 5

Note: * denotes Inactive Assigned Staff



Inventory Reports

- One location to find multiple reports
 - Reports → Data Analysis
- Only available to Supervisors and Managers



Inventory Reports

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

★ Temporary Shelter Bed Assignments and Statuses	▶ RUN
★ Temporary Shelter Bed/Unit Roster	▶ RUN
★ Temporary Shelter Client Roster	▶ RUN



Bed/Unit Roster

- Roster of all **beds/units** in your site with associated client
- Can see beds without a client assigned

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	- ...	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 of all clients in your site with associated bed/unit
- Can see clients without a bed assigned

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

Bed Assignments and Statuses

- Useful report for checking bed status and unassigned clients
- Tells you how many clients are not assigned to a bed and provides a list of unassigned clients

Counts of Clients by Assignment Status			
Name	Enrolled Clients	Clients Assigned to a Bed	Clients Not Assigned to a Bed
Baldwin Navigation Center	179	178	1
Bayshore Navigation Center	114	113	1
Bayview SAFE Navigation Center - HHAP+GF+ERAF	201	199	2
Central Waterfront Navigation Center	42	42	0

