



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

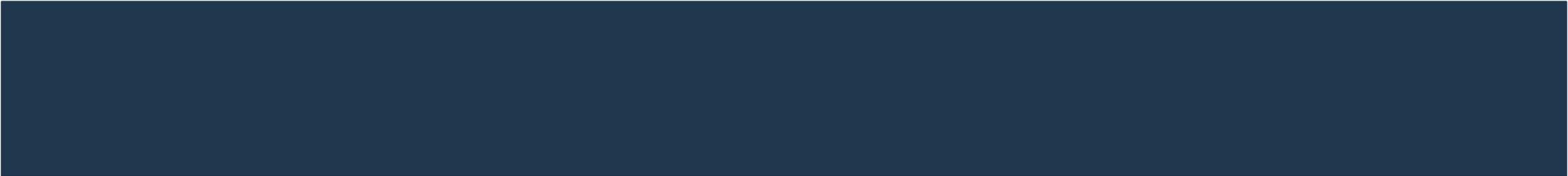
Agenda

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



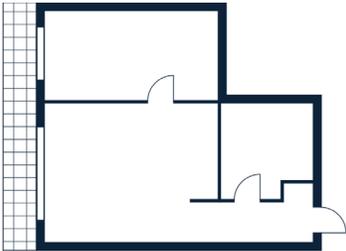
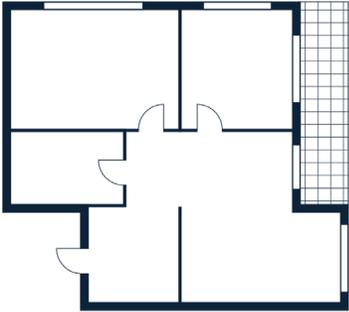


WHAT IS INVENTORY?

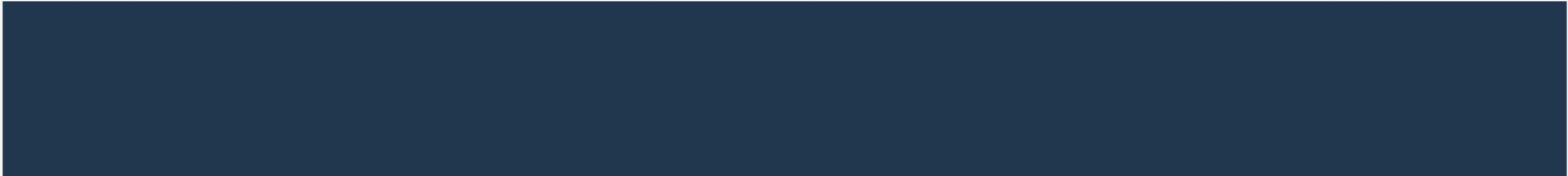


ONE System INVENTORY Overview

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

The screenshot displays the INVENTORY Module Dashboard. At the top, there are filters for Status, Agency, Site, and Building. The main content area is divided into several sections:

- Unit List:** A list of units with details such as name, address, and status. For example, "Spaces Unit Test" (98 Ginger Hill Ln, Washington, VA 22747) is marked as "Available". Other units include "UC" (500 W Owens Ave, Las Vegas, NV 89106) and "Studio" (220 Golden Gate Ave, San Francisco, CA 94102).
- Map:** A map showing the geographic locations of the units, with markers indicating their positions.
- Summary Statistics:** A vertical bar on the right side of the map displays key metrics: Total Units (25), % Available (48), % Occupied (24), % Offline (12), % Pending (16), and Total Beds (197).
- Configuration Panel:** A sidebar on the right side of the dashboard allows users to configure various settings, including Funding, Program, Program Type, CoC, and Custom options like Field Marker Picklist N... and ADA Unit.
- Unit Details Panel:** A central panel provides detailed information for a selected unit, including Name (1), Type (UCT), Agency (Alex test), Site (5454), Building (65456465), Program (!!!Test Program), Beds (77), and Address (500 W Owens Ave, Las Vegas, NV 89106).

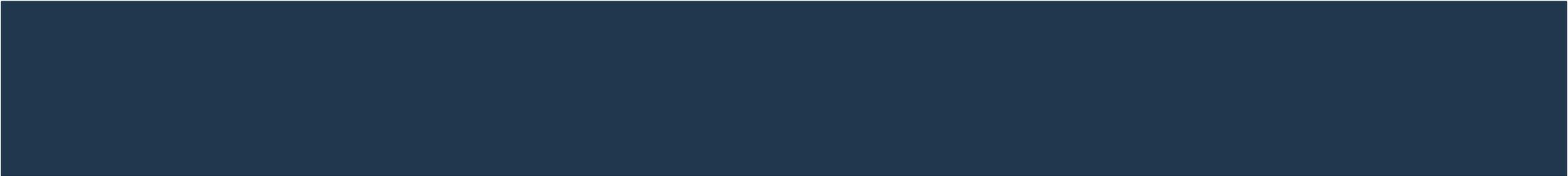
INVENTORY Display Cards

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

The screenshot displays a web application interface for unit inventory. At the top, there are filters for Status, Agency, Site, and Building. The main content area shows a list of unit cards. Each card includes a unit number, name, address, and status (e.g., 'Pending Occupancy' or 'Available'). Below the unit name, there are tags for various agencies and sites. A details modal is open for unit 100, showing an overview with fields for Name, Type, Agency, Site, Building, Program, Beds, and Address. The modal also includes a 'More information' section with unit details such as ADA, Accessible for Wheelchair, Bariatric Beds, Bedside Outlet, and Higher Bed. On the right side of the interface, there is a map showing the location of the units and a summary panel with statistics: Total Units (25), % Available (92), % Occupied (0), % Offline (0), % Pending (8), and Total Beds (25).



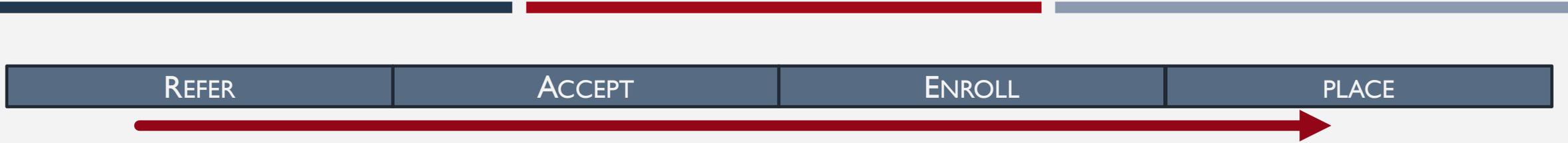
TEMPORARY SHELTER WORKFLOW



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		Mode		Standard			
Sort By		Default		Characteristic			
Eligible Clients Only		-- Select --		SEARCH			
Client	Referral Date	Qualified	Days Pending				
Jenny Jones Program: Haight Street Apartments Referred by: [TRAINING] Department of Homelessness and Supportive	01/07/2022	Reassigned	282 total 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.	
<div style="display: flex; gap: 10px;"> B I ☰ ☰ </div>	

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 shows the 'REFERRALS' interface with the 'Pending' tab selected. A navigation bar at the top includes 'Dashboard', 'Pending', 'Community Queue', 'Analysis', 'Completed', 'Denied', 'Sent', 'Availability', and 'Open Units'. Below the navigation bar, there is a search area with a 'Pending Ref' label. A dropdown menu is open, showing options: 'Default', 'Program Name', 'Client Name', 'Date of Referral', and 'Referring Agency'. To the right of the search area, 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.

REFER

ACCEPT

ENROLL

PLACE

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	<input type="text" value="Client came to shelter and said they did not want to stay"/>	

REFER

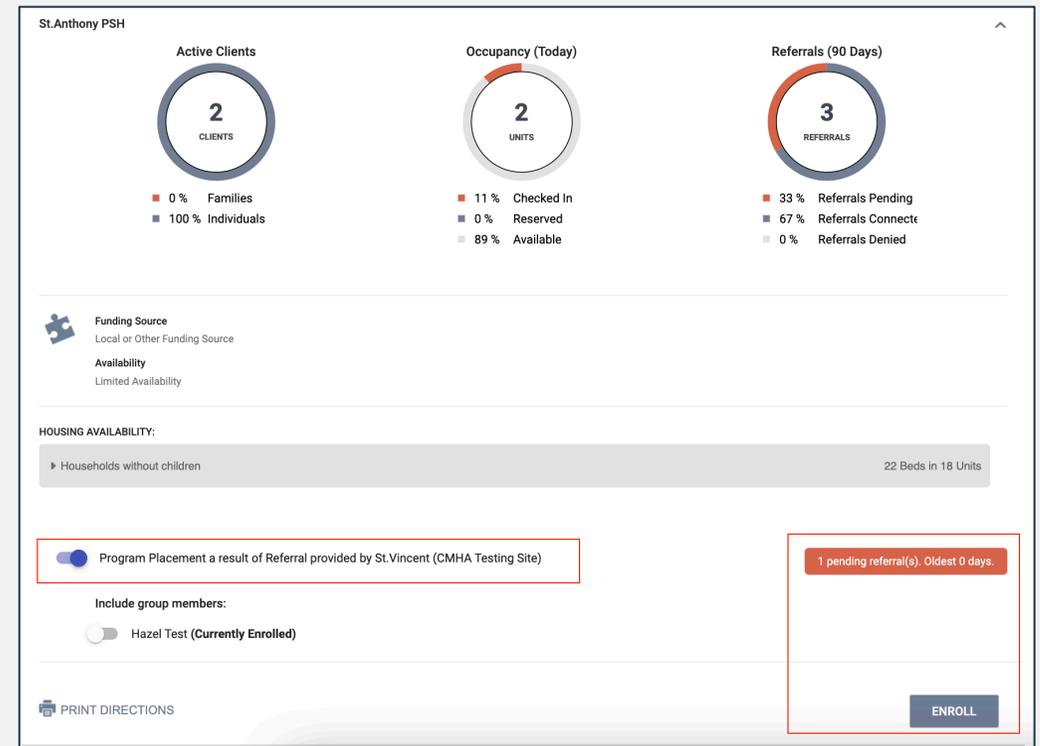
ACCEPT

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)	<input type="text"/>	
Do you have other places you sleep? (Addresses or Locations)	<input type="text"/>	
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

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 +

Start Date 07/18/2022 25

End Date 25

Eligibility Override

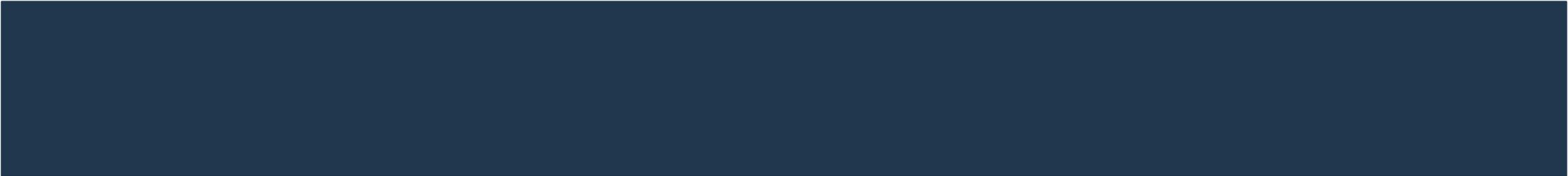
Available Units Unit 101 (St.Anthony (PSH), Building 1) ▼

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

The screenshot displays a user interface for a client named Brad Jones. The top navigation bar includes 'PROFILE', 'HISTORY', 'SERVICES', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', 'CONTACT', 'LOCATION', and 'REFERRALS'. The main content area is titled 'PROGRAM: JEFFERSON HOTEL - GF' and has sub-tabs for 'Enrollment', 'History', 'Assessments', 'Notes', 'Files', 'Units', and 'Forms'. A red box highlights an 'X Exit' button in the top right corner of the 'History' tab. Below the tabs is a 'Program Service History' section. A table is shown with columns for 'Start Date' and 'End Date'. The first row shows '08/03/2022' for both start and end dates, with the end date highlighted by a red box. The second row shows '07/11/2022' for the start date and '07/12/2022' for the end date.

	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 shows a web application interface with a dark blue header and a white main content area. The header contains navigation links: PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below the header, there is a secondary navigation bar with links: Enrollment, History, Provide Services (highlighted), Events, Assessments, Notes, Files, Chart, Units/Beds, Forms, and an Exit button. The main content area is titled "Services" and contains a form for logging a "Rule Violation (Non-immediate Category)". The form has a dropdown menu for "Other" with a downward arrow. The first rule violation is selected, showing the text: "a) Repeated failure to wear mask for confirmed COVID-19 positive individual in COVID-19 isolation period. Not outright refusal but failure to comply." Below this text, there is an "Event Date" field with the value "08/24/2023" and a calendar icon. A "Service Note" field is present, containing a rich text editor with buttons for Bold (B), Italic (I), Bulleted List (•), and Numbered List (1). A "SUBMIT" button is located at the bottom right of the form. Below the first rule violation, there are two more options, each with a downward arrow: "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."



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

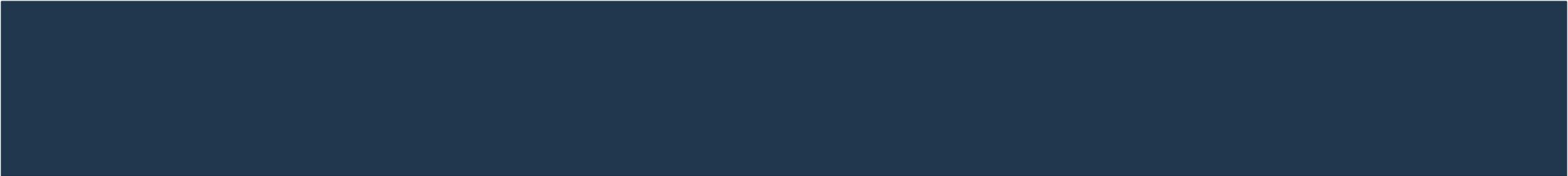
- Exits are necessary for all denials of service, whether it be an immediate or non-immediate reason
- Exit Reason = **Rule Violation**
 - New dependent fields
 - Denial of Service - 1=Immediate Denials of Service; 2=Non-immediate Denials of Service
 - Effective Date of Denial of Service
 - Date of Denial 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

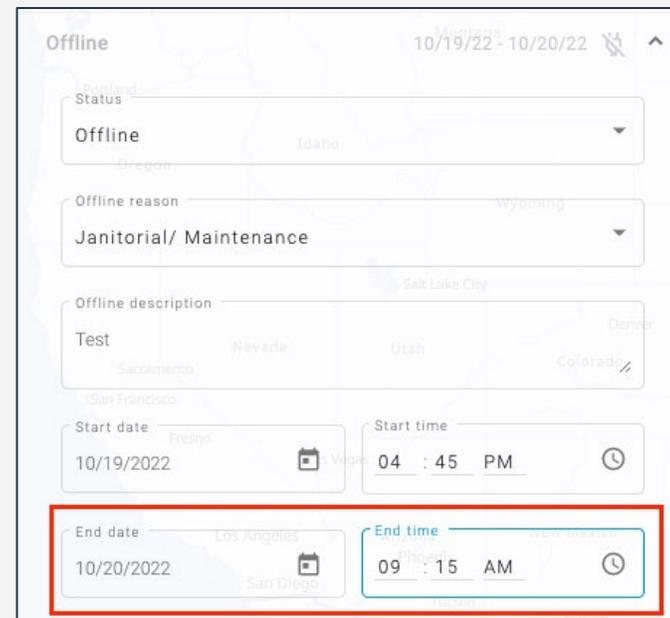
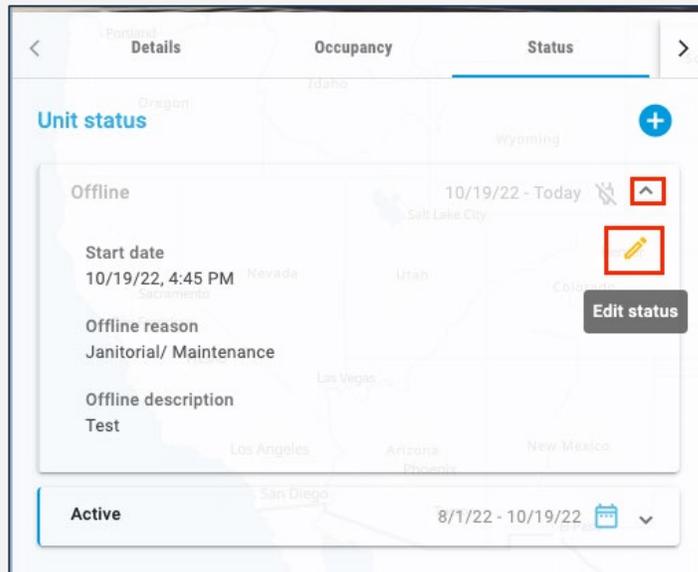
Making Units/Beds Offline

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

The screenshot displays a unit management interface. At the top, there are filters for Availability, Agency, Site, and Building. Below the filters, a list of units is shown. The first unit is 031, an Adult Studio at Franciscan Towers Scattered Site, with an 'Available' status. The second unit is 1, an Adult SRO at HSH Fund, also with an 'Available' status. A detailed view of unit 031 is overlaid on the right, showing the 'Status' tab selected. The status is currently 'Active' with an end date of '3/1/23 - Today'. A red box highlights the 'Status' tab, and a plus sign indicates the option to add a new status. The background shows a map of San Francisco.

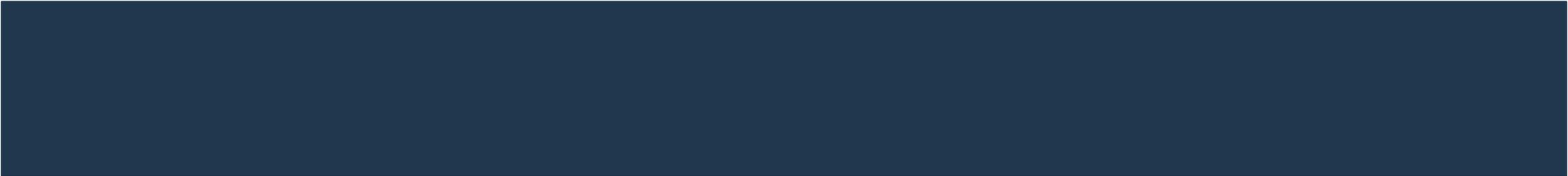
Editing/Ending a Unit Offline Status

- 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





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, <input type="checkbox"/> = 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

The screenshot displays the 'United Living International' dashboard. At the top, there is a navigation bar with 'REPORT LIBRARY', 'EXPLORE', and 'DATA ANALYSIS'. The 'DATA ANALYSIS' section is active, showing a sub-menu with 'REPORTS', 'CALENDAR', and 'INVENTORY'. The 'REPORTS' option is highlighted with a red box. Below this, a table lists report categories:

Category	Count
Built In Reports	0 report(s)
San Francisco ONE System Reports	74 report(s)
United Living International Reports	1 report(s)

Red arrows indicate the flow from the top navigation bar to the 'REPORTS' menu item, and from the 'REPORTS' menu item to the 'San Francisco ONE System Reports' entry in the table. A red box also highlights the grid icon in the top right corner of the dashboard.

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

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