DEPARTMENT OF
HOMELESSNESS AND
SUPPORTIVE HOUSING

ONE System Inventory

Phase 3 Launch

Checking In

Presenting today:

HSH	Laura Jessup (they/them), ONE System Organizational Change Manager
Bitfocus	Sara Hoffman (she/her), Senior Project Manager
	Melissa Wheeler (she/her), Project Manager

🔑 In the chat:

- Name
- Pronouns
- Agency
- Role
- Add an emoji or gif for how you're feeling today

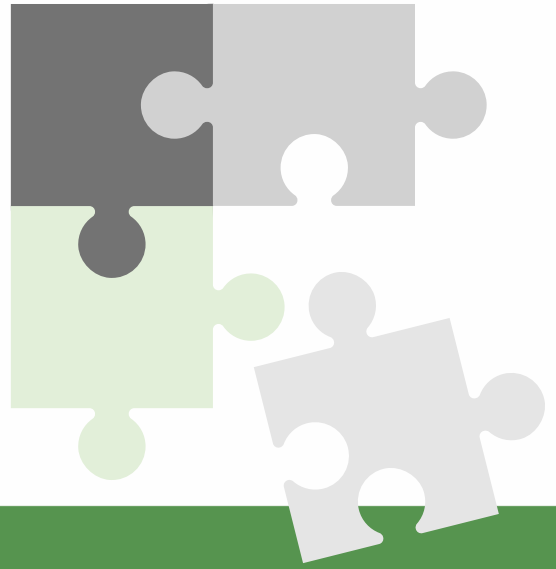
Goals for today

- By the end of this session, we'll have a shared understanding of:
  - Why we are launching Inventory
  - What Inventory will and won't do
  - How the new functionality will appear in your day-to-day work
  - Changes to your current workflow

    (spoiler alert: they're small... but will have a big impact!)
  - What to expect around the timeline and transition related to the OVT
  - How to get help if you have questions

What's happened so far?

- Phase 1: Pilot at the Jefferson (August 2022)
- Phase 2: Buildings with HAT units (November 2022)
- You helped us to collect information about all units in Phase 3, and to correctly associate each current client with one of those units
- Phase 3 will launch the biggest step of Inventory so far
  - All site-based PSH in San Francisco



What Inventory Is and Isn't

- Inventory is not an entirely new platform, a property management system, or an overhaul of the ONE System

Inventory *is*:

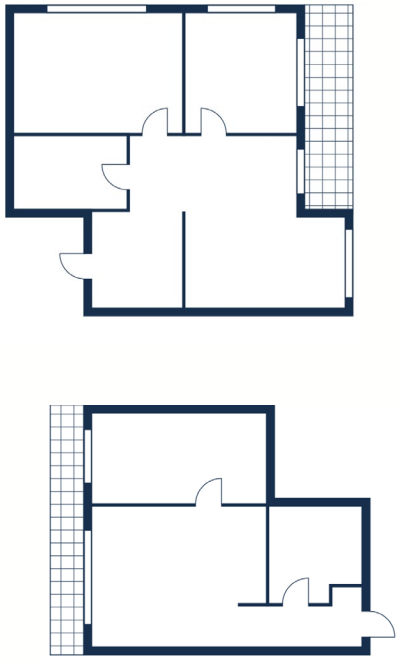
- A new set of tools built into the ONE System
- A way to more precisely track and view the current status of each unit in your program, building, and agency
- Information that will help better match clients to the units that best fit their needs

What Inventory Will Do

- Help streamline workflows and better serve clients
- Remove the need to use the Offline Vacancy Tracker (OVT)
- Provide better information to HSH and the community about which units are unoccupied
- Support reconciliation and communication by being a reliable source of truth
- Provide more transparency into the overall housing portfolio

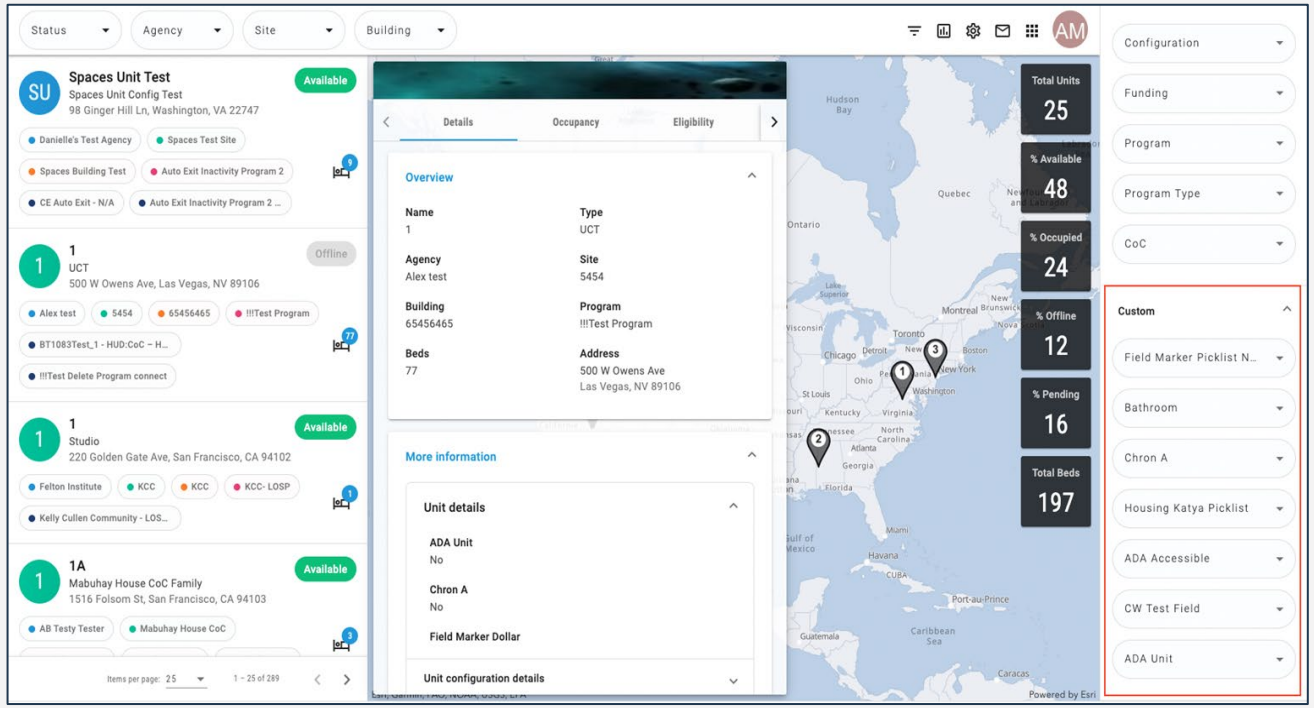
Clarity Inventory

Sites ⋙ Buildings ⋙ Units ⋙ Beds ⋙ Units Attributes



Inventory Module Dashboard

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



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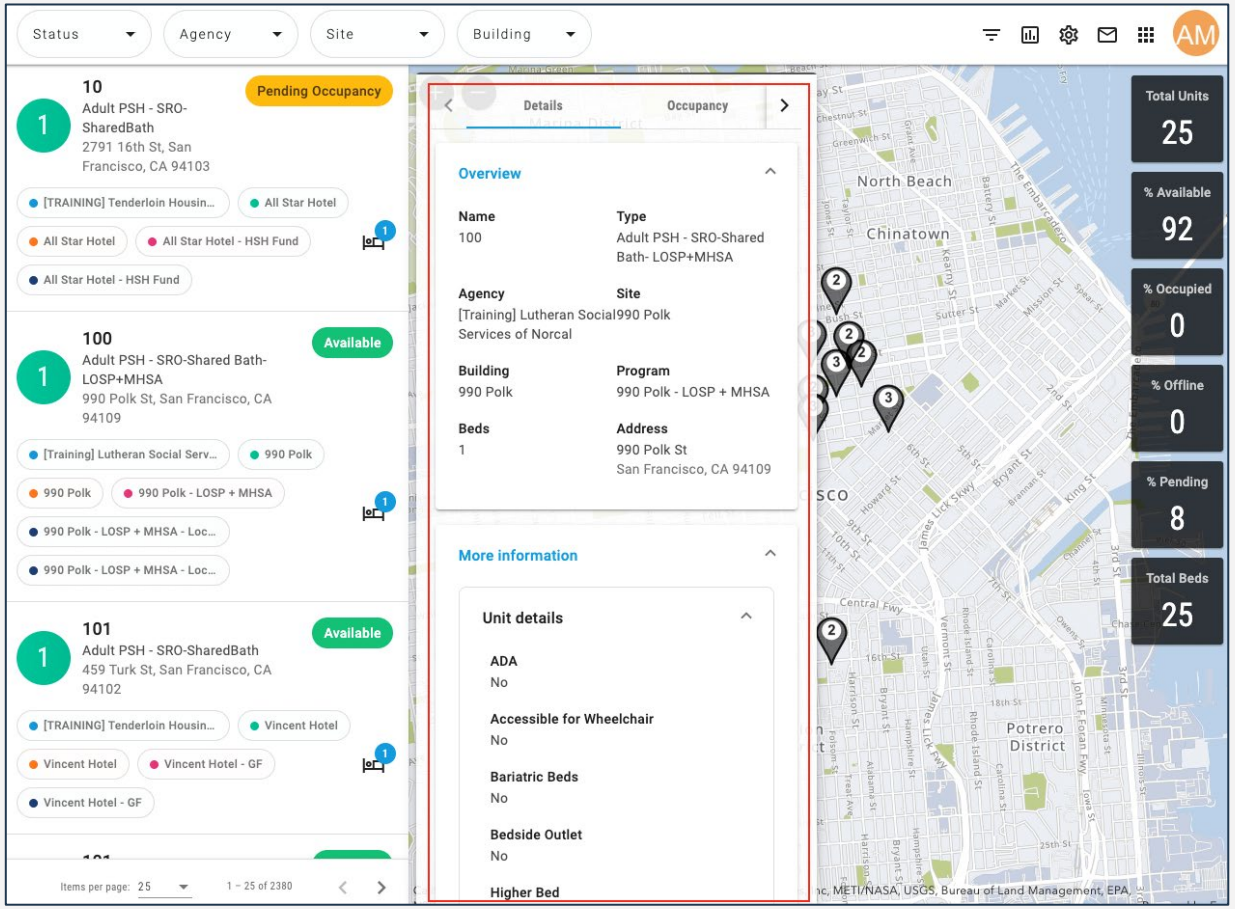
Inventory Display Cards

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



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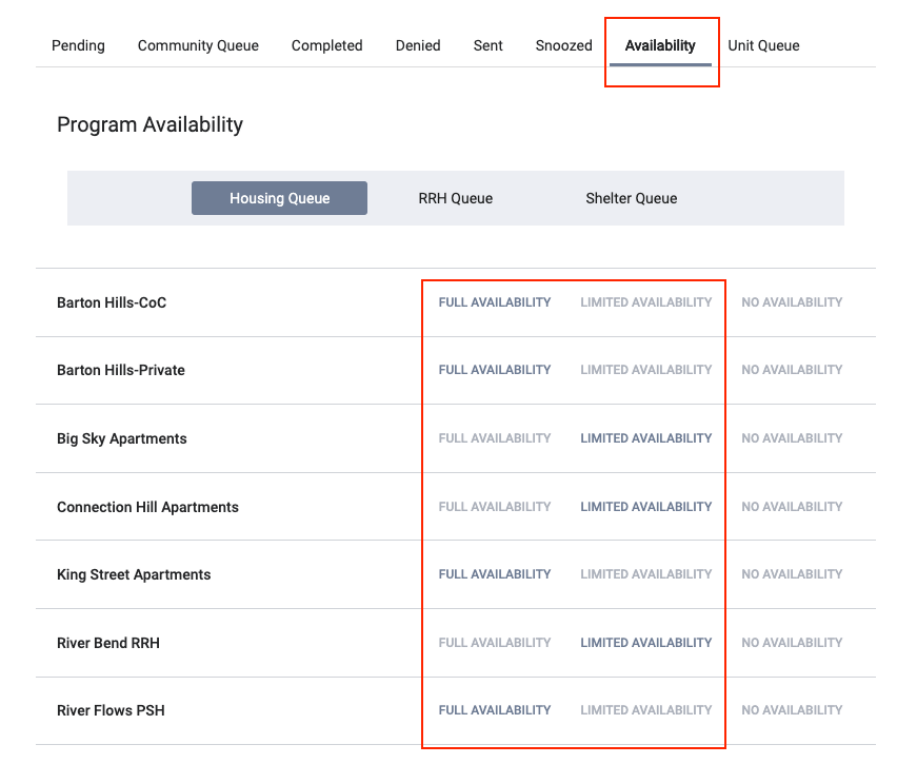
Program Availability

- **Full availability:** programs receiving provider-level referrals (formerly “batch referrals”). Referrals are made at the program level; no individual openings are posted

- **Limited availability:** programs post individual openings when they have a unit that is referral ready



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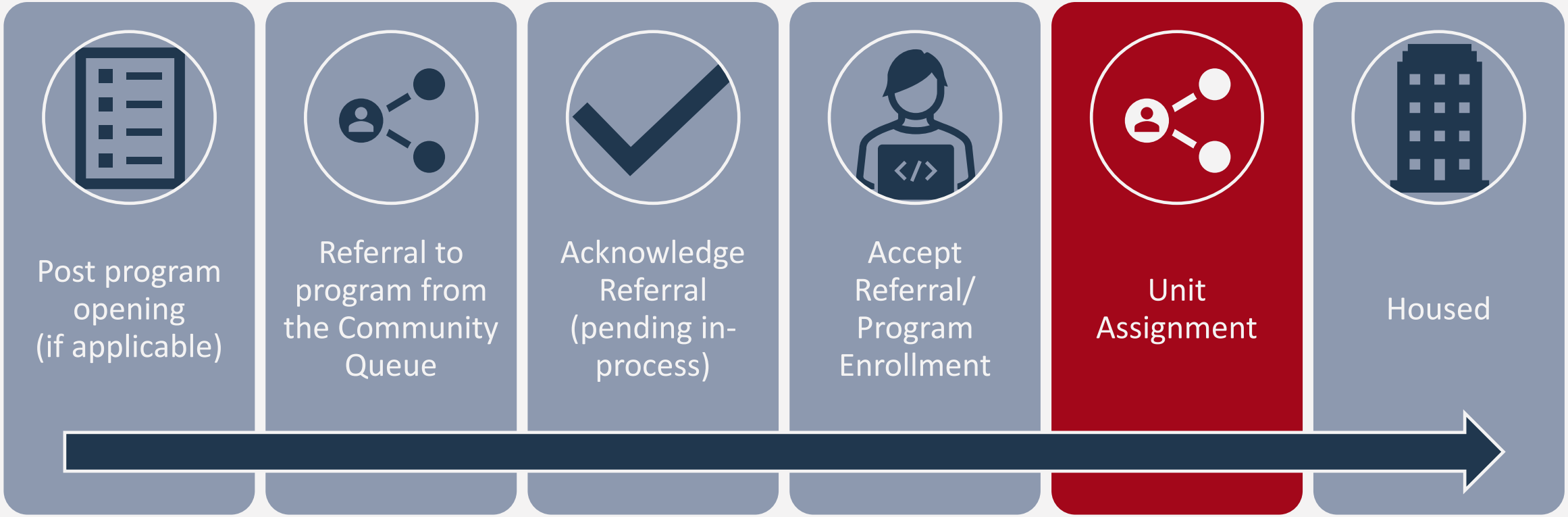
Referral Process



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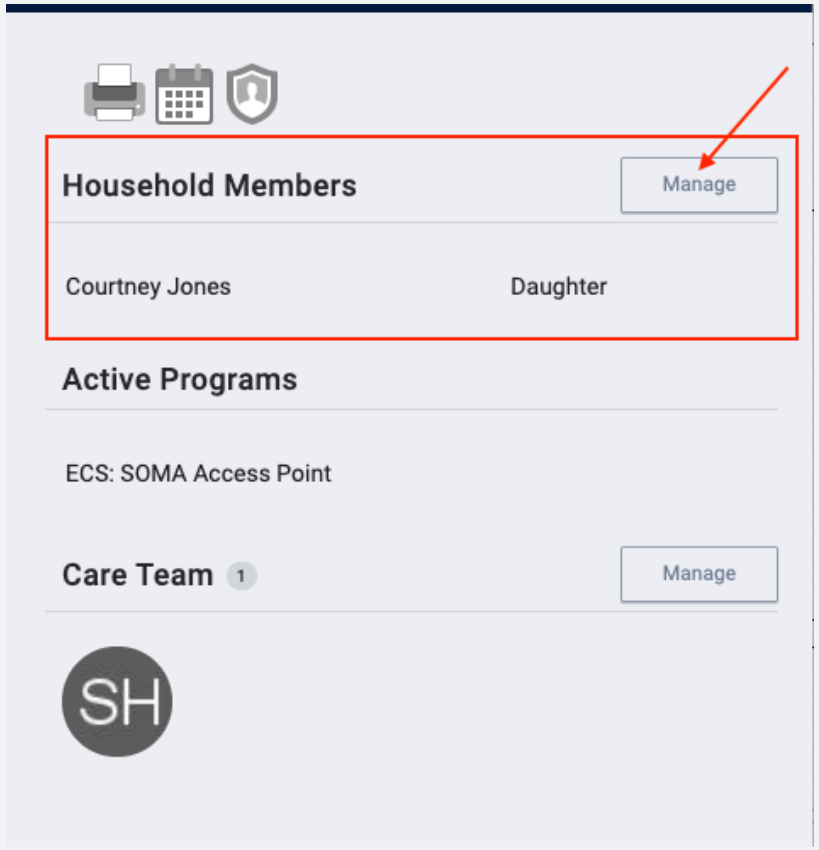
Household Composition

- Confirm the household composition is correct
- Add or remove people if needed



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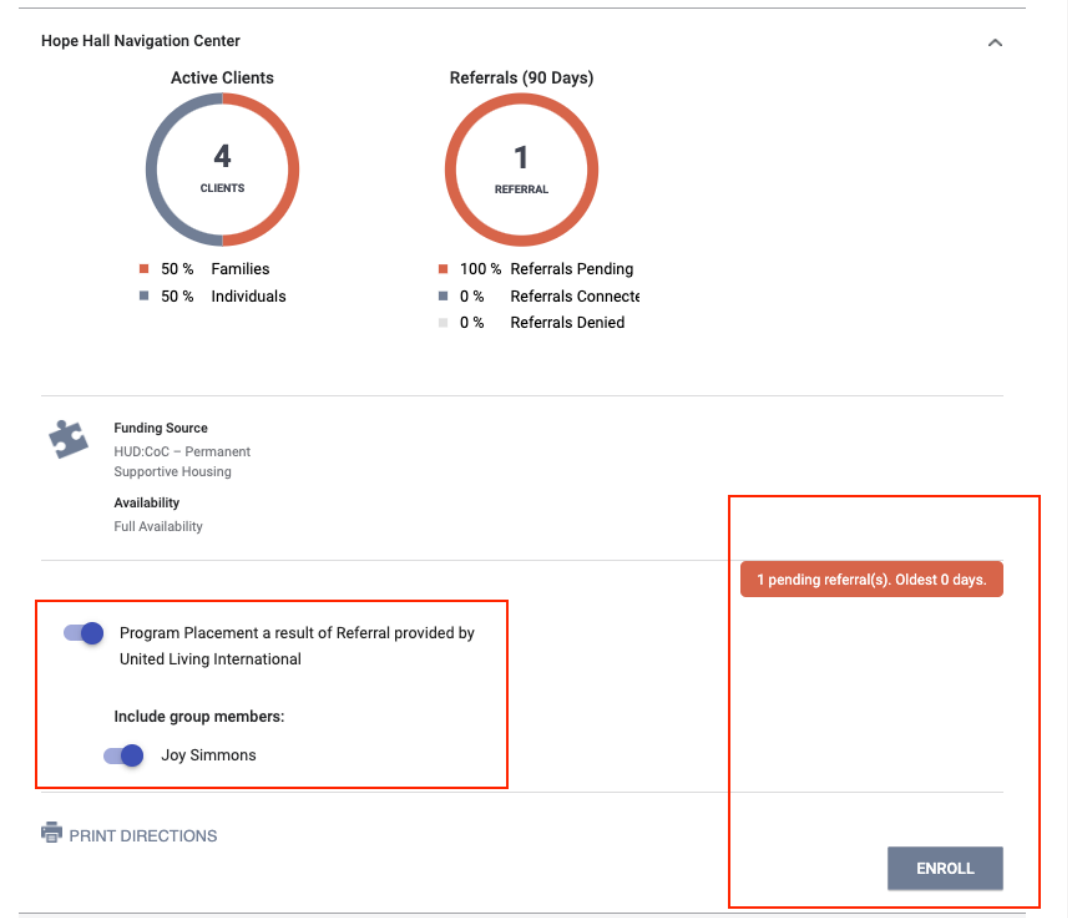
Accepting Referrals

- Enrolling the client into the program, will also complete 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



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Enrollment

Enrollment | History | Provide Services | Assessments | Notes | Files | Units | Forms

Enroll Program for client Randall Hall

Program Date	07/06/2022

COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date	07/06/2022

PRIOR LIVING SITUATION

Type of Residence	Place not meant for habitation (e.g., a vehicle, an abandoned building, bu
Length of Stay in Prior Living Situation	One month or more, but less than 90 days
Approximate Date Homelessness Started	02/09/2022
Number of times on the streets, in ES, or Safe Haven in the past three years	Three Times
Total number of months homeless on the streets, in ES, or Safe Haven in the past three years	Four Months

LIFETIME LENGTH OF HOMELESSNESS IN SF

Have you ever been homeless in SF?	Select

LIFETIME LENGTH OF HOMELESSNESS OUTSIDE OF SF

Have you ever been homeless outside of San Francisco?	Select
Last Permanent Zipcode	78613

- For PSH, move-in date and program start date should reflect the move-in date
- Collect as much information as possible

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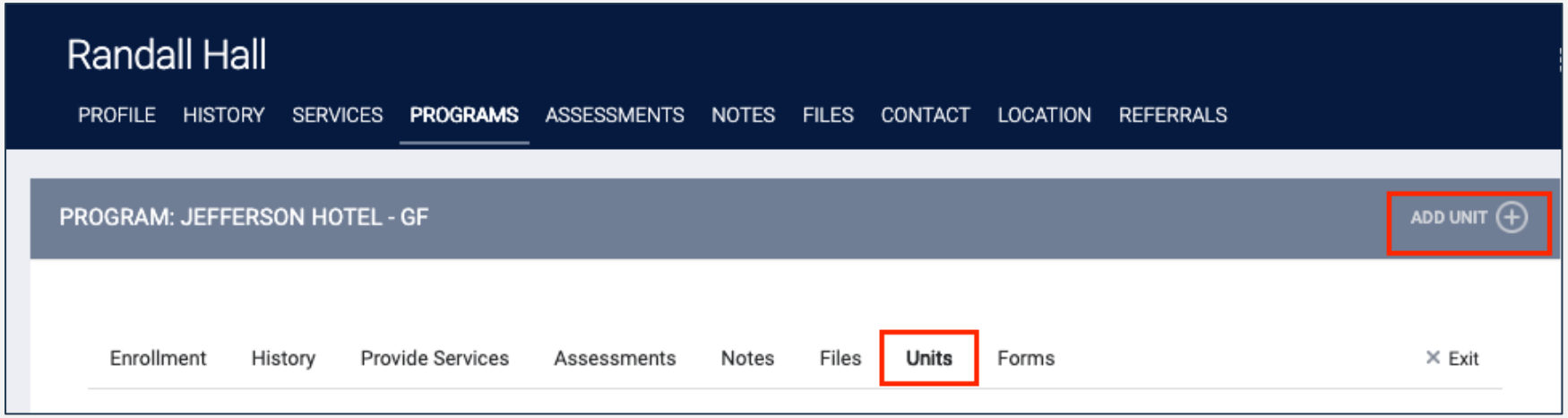
Unit Assignment

- Completed under the *Unit Tab*
- **Completed at the time of enrollment**
- Only the head of household is assigned to the unit



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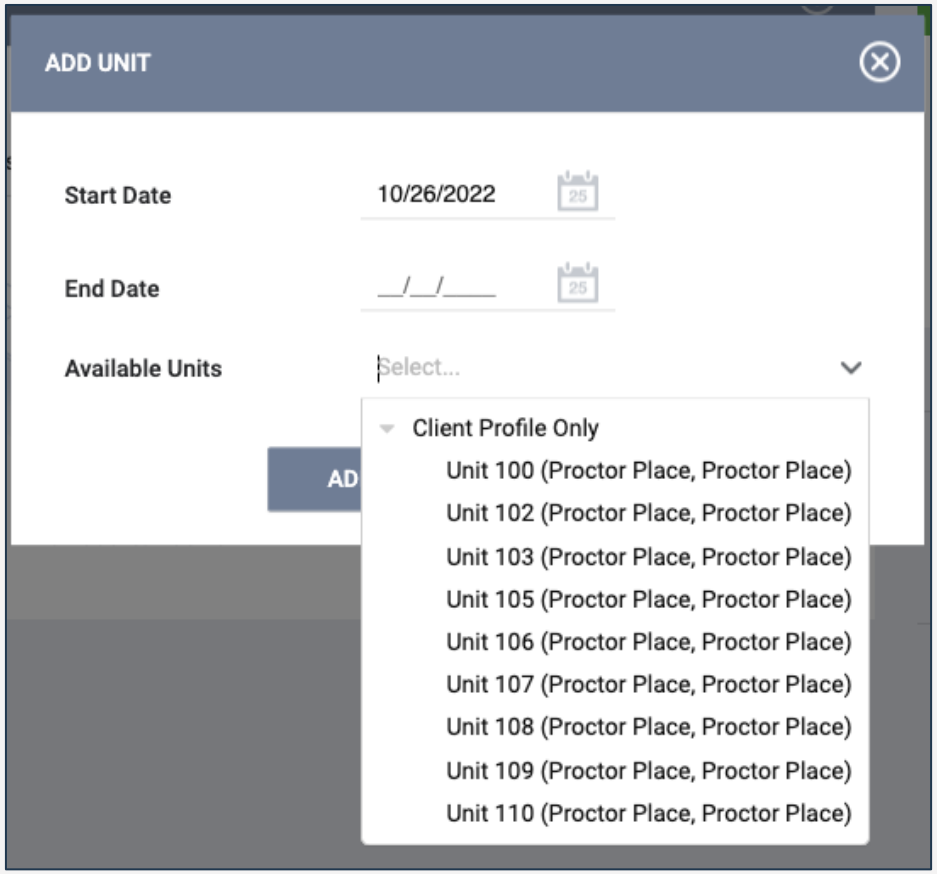
Unit Assignment

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



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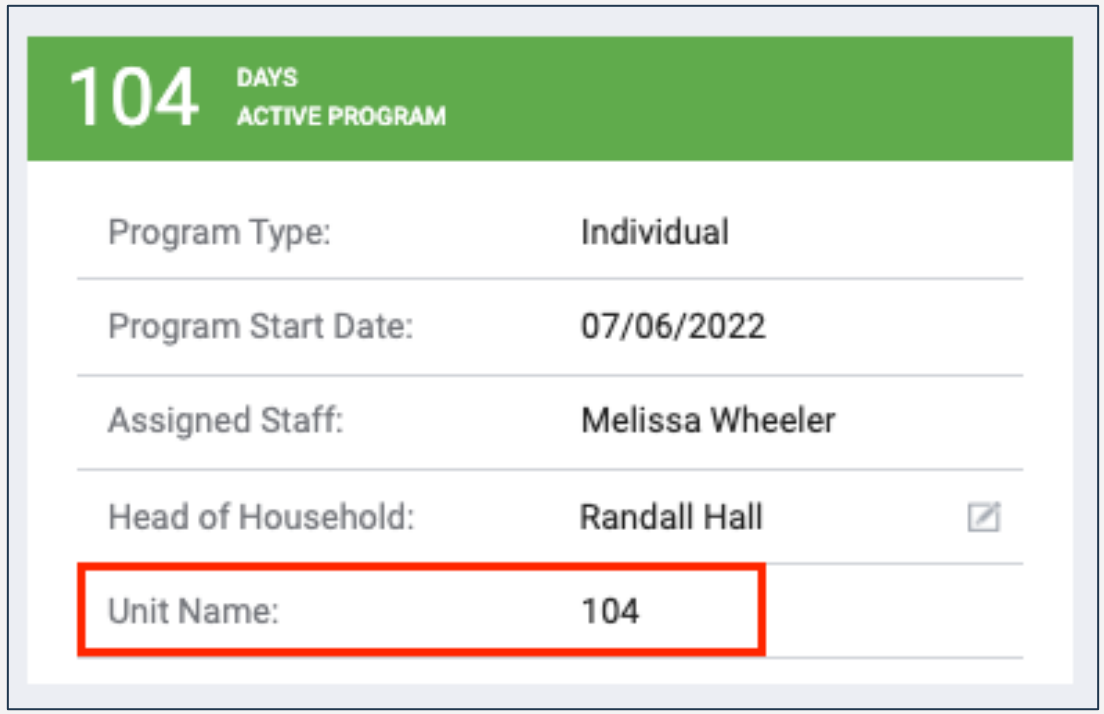
Enrollment Sidebar

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



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What if a Unit Isn't Listed?

Units show based on eligibility criteria	→	Click *Eligibility Override* to override eligibility criteria
Available Units- only shows available units	→	Check to see if the unit is occupied
Available Units- only shows active units	→	Check to see if the unit is offline

Full availability programs

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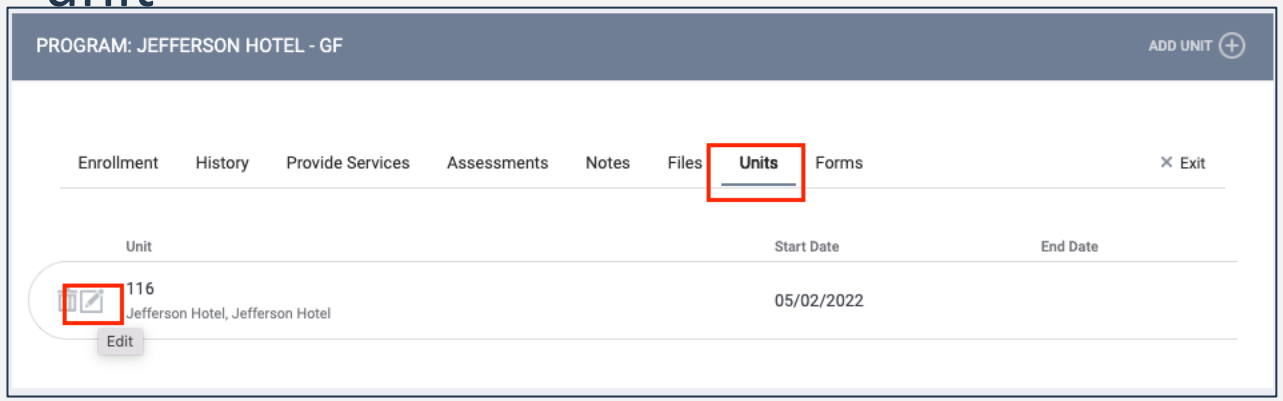
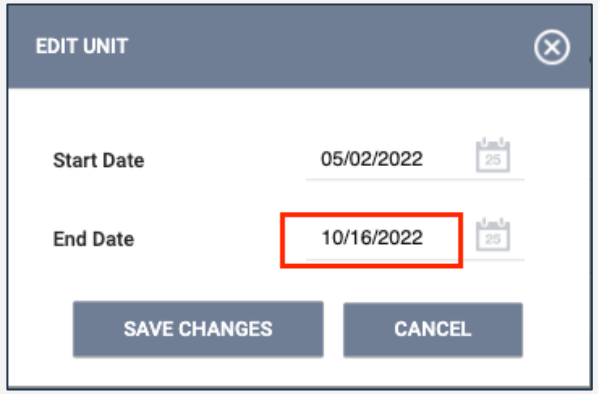
Internal Transfers (Within a Program)

- Client can be moved to a different unit due to:
  - Reasonable accommodation, safety, and facility issues
- Unit transfers are completed under the *Unit Tab*
- End date for the current unit should be the last day the client slept in the unit





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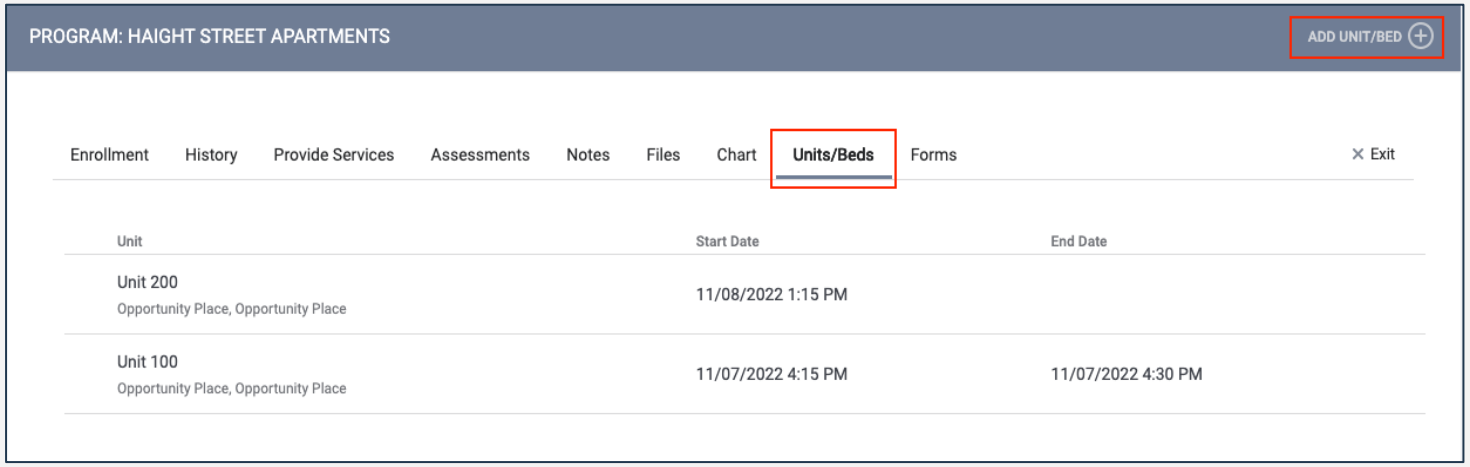
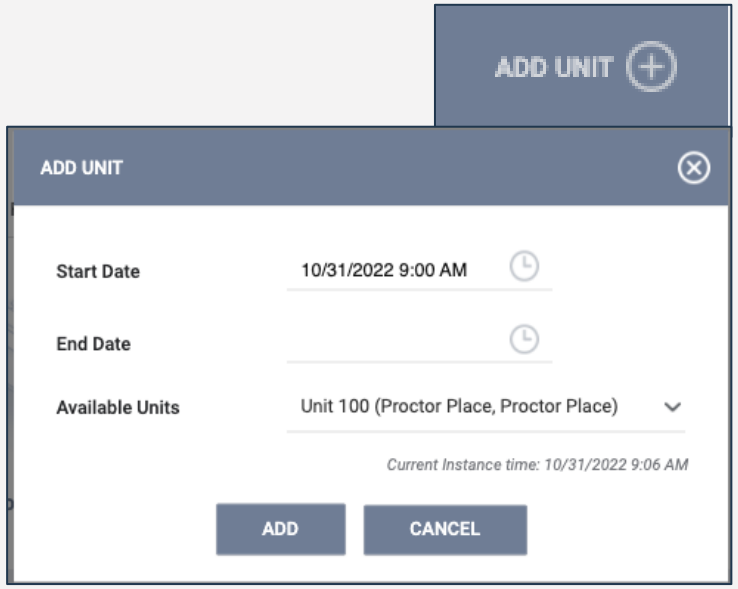
Internal Transfers (Within a Program)

- Start date for the new unit should be the first day the client will sleep in the unit





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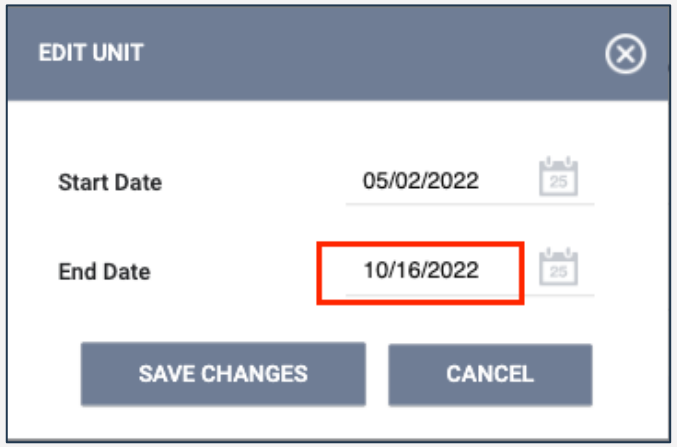
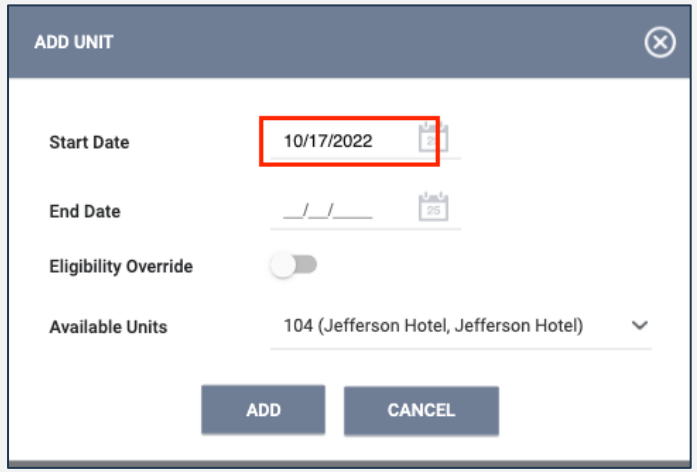
Internal Transfers (Within a Program)

- The start and end dates should not overlap

End Date for Current Unit



Start Date for New Unit



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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 unit
  - Complete an exit for all household members

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[GNRL-106] Program Roster

- Accessed under Program Based Reports
- Includes program stay information
- Includes unit assignment

Program Roster Report

United Living International (ULI)
Active within 01/01/2022 thru 03/31/2023

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: Proctor Place Apartments																
Simmons, Lucy	**D476AF867**	10/06/1985	37	37	10/26/2022	-	157	10/26/2022	0	0	0	S. Hoffman	Unit 111	n/a	10/26/2022	
Simmons, Joy	B292B01C7	11/15/2018	3	4	10/26/2022	11/28/2022	33	10/26/2022	0	0	0	S. Hoffman		n/a		
Roberts, Rob	**A3659C0CC**	11/21/1954	68	68	12/01/2022	12/01/2022	0	12/01/2022	0	0	0	S. Hoffman	Unit 102	n/a	12/01/2022	12/01/2022
Titan, Robin	**FC58384A7**	01/01/2003	19	20	10/26/2022	10/26/2022	0	undefined	0	0	0	A. Maldonado	n/a	n/a	n/a	n/a
Hall, Randall	**C6B6E49FC**	10/13/1956	66	66	10/27/2022	-	156	10/27/2022	0	0	0	M. Wheeler	Unit 105	n/a	10/27/2022	
Robbins, Alexander	**96419981F**	10/30/1995	27	27	12/01/2022	-	121	12/01/2022	0	0	0	S. Hoffman	Unit 108	n/a	12/01/2022	
Robbins, Trevor	8568CD308	12/13/2015	6	7	12/01/2022	-	121	12/01/2022	0	0	0	S. Hoffman		n/a		

Number of Enrollments: 7
Number of Unique Clients: 7
Number of Households: 5

Total Number of Enrollments: 7
Total Number of Unique Clients: 7
Total Number of Households: 5

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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 is available to receive referral (move-in ready)
	Occupied	Client/household is living in the unit.
Offline		Unit is temporarily unavailable (e.g., due to needed maintenance).
Inactive		Unit 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.

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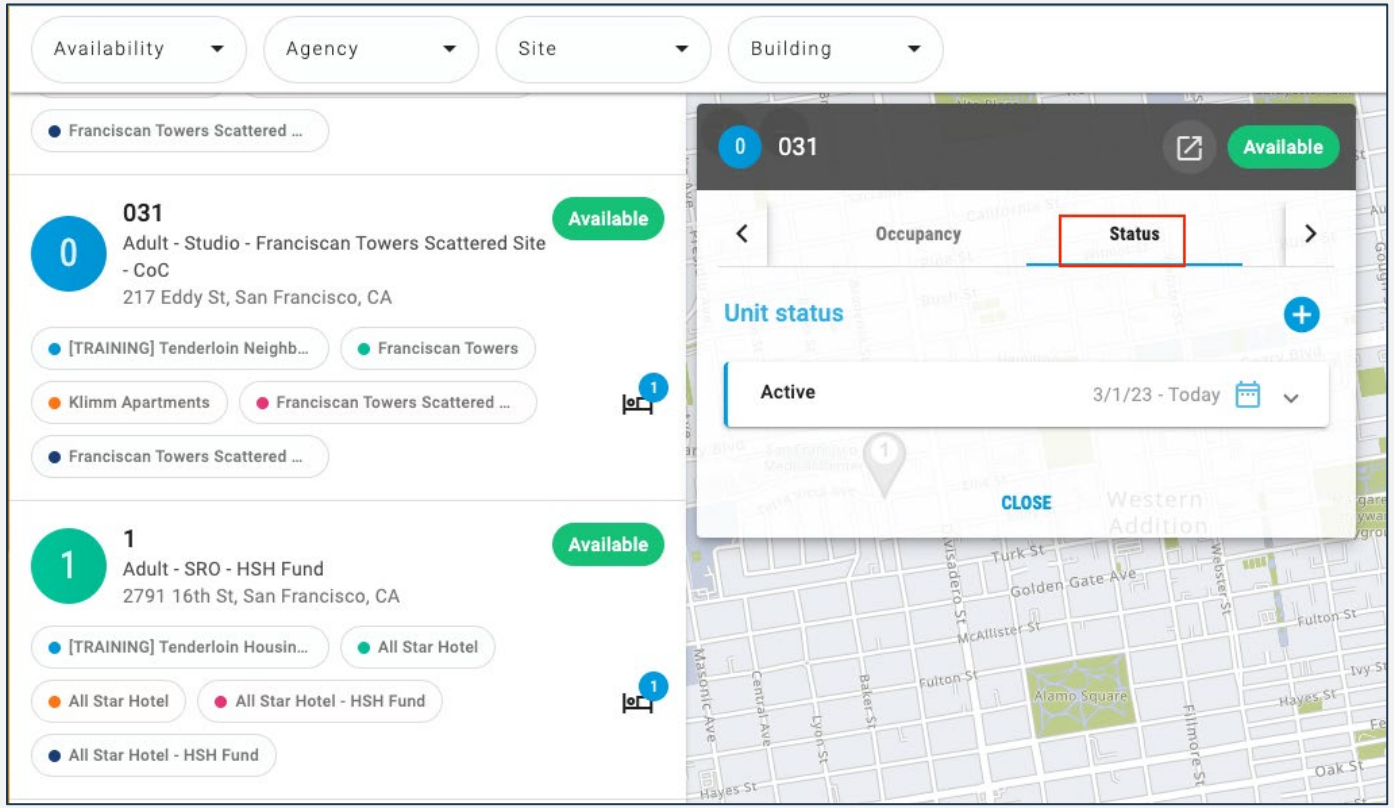
Making Units Offline

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



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Offline Reasons

- Offline reasons are different than what was in OVT
- Reasons are labeled with the program specifiers:
  - **HSG** (housing)
  - **SHLTR** (shelter)
  - **HSH** (HSH internal staff use only)
- The toolkit includes a complete set of definitions

Reason Name	Definitions
HSG/SHLTR – Janitorial/Maintenance	The unit is unavailable for client placement due to janitorial or maintenance needs.
HSG/SHLTR – Internal Transfer (within program)	The unit is held for an in-program transfer, such as a reasonable accommodation move or other transfer from another unit in the same program.
HSG/SHLTR – Property Hold	The unit is unavailable due to a property hold. This status can also be used for property management needs that are not covered by any other offline reason. Please include notes explaining the circumstance.
HSG – Coroner Hold	The unit is held pending a coroner or medical examiner review.
HSG – Occupied by Legacy Tenant	The unit is currently occupied by a legacy tenant who is not enrolled in the program in ONE.
HSG – Occupied but No Client ROI	The unit is currently occupied by a client refusing to sign an ROI, meaning they cannot be enrolled in the program in the ONE System.
HSG – Occupied Temporarily by Client from Other Program/Building	The unit is temporarily occupied by a client who is enrolled in another program or building, and therefore cannot be assigned to the client.
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.
HSH – Reserved for External Transfer	This status is set only by HSH staff for units in programs that are set to Full Availability in ONE. The unit is held by the HSH Transfer Request Office for a transfer from another HSH program. Though this status will always be set by HSH staff, Property Managers or Service Providers will need to end this status to assign the designated client to the unit.
HSH – Reserved for Provider Level Referral	This status is set only by HSH staff for units in programs that are set to Full Availability in ONE. The unit is held by the HSH housing placement team for a provider-level referral. Though this status will always be set by HSH staff, Property Managers or Service Providers will need to end this status to assign the designated client to the unit.

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Offline Reasons - "Occupied by..."

HSG – Occupied by Legacy Tenant	The unit is currently occupied by a legacy tenant who is not enrolled in the program in ONE.
HSG – Occupied but No Client ROI	The unit is currently occupied by a client refusing to sign an ROI, meaning they cannot be enrolled in the program in the ONE System.
HSG – Occupied Temporarily by Client from Other Program/Building	The unit is temporarily occupied by a client who is enrolled in another program or building, and therefore cannot be assigned to the client.

- 3 new offline reasons that indicate a unit is unavailable for move in **because they are occupied***:*
  - Occupied by Legacy Tenant
  - Occupied but No Client ROI
  - Occupied Temporarily by Client from Other Program/Building
- Set units that fall in these categories to offline to keep available units up-to-date

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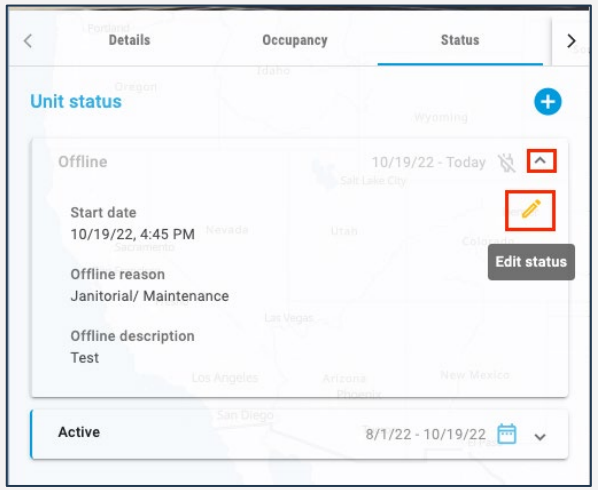
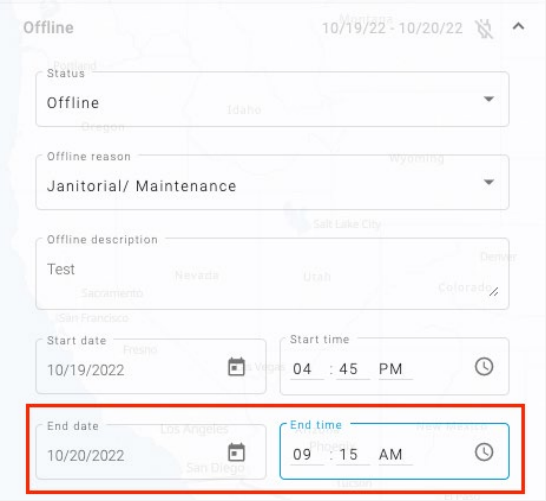
Editing/Ending a Unit Offline Status

- 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





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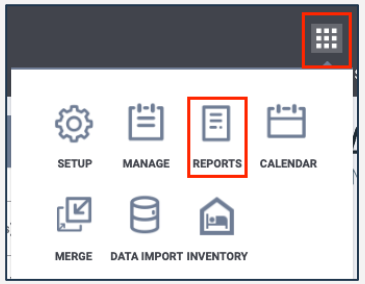
Building Roster Report

- Accessed under the Data Analysis Tab
  - Under San Francisco ONE System Reports > Inventory
- Provides unit availability and status information
- Must be filtered by building



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Building Roster Report

*Inventory- Housing

Building Roster

7m ago

Is this housing or shelter/navigation center?	Building Status	Building Name *	Current Availability
Housing	is Active	is Jefferson Hotel	is any value

Summary of Units by Status

108

Total Units

Breakdown of Units

	Current Availability	Unit Availability Status
1	Occupied	101
2	Offline	6
3	Available	1
Totals		108

Units by Status

	Building	Unit Name	Unit Configuration	Current Availability	Offline Reason	Head of Household	ONE Profile Link	Occupancy Start Date
1	Jefferson Hotel	315	Adult - SRO- GF	Occupied	∅		103693	2023-03-03
2	Jefferson Hotel	210	Adult - SRO- GF	Occupied	∅		100033	2022-12-01
3	Jefferson Hotel	505	Adult - SRO- GF	Occupied	∅		99250	2022-08-31
4	Jefferson Hotel	525	Adult - SRO- GF	Occupied	∅		99246	1991-08-15
5	Jefferson Hotel	211	Adult - SRO- GF	Occupied	∅		97457	2023-02-03
6	Jefferson Hotel	105	Adult - SRO- GF	Occupied	∅		97227	2023-01-25
7	Jefferson Hotel	109	Adult - SRO- GF	Occupied	∅		95094	2023-03-03

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Housing Inventory Snapshot Report

- Accessed under the Data Analysis Tab
  - Under San Francisco ONE System Reports > *Inventory - Housing
- Provides Portfolio level view of all site-based housing units in ONE, including Unit Status
- Includes difference between posted program openings and available units for easy reconciliation
- Full Availability Programs will show as “N/A” in the Program Openings column

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Housing Inventory Snapshot Report

Housing Inventory Snapshot

43m ago

Agency Name: is any value

Program Name: is any value

Agency Name	Program Name	Building Name	Total Unit Count	Inactive Units	Offline Units	Occupied Units	Available Units	Program Openings (with and without referrals)	Difference of Available Units and Program Openings
Abode Services	Verona - GF	Verona Hotel	65	0	1	64	0	0	0
Bay View Hunters Point M...	Dr. Davis Senior Communi...	Dr. Davis Senior Community	23	0	1	0	22	1	21
Bayview Hunters Point Fo...	Arlington Residence - CoC	Arlington Residence	21	0	0	16	5	N/A	N/A
	Arlington Residence - HUD...	Arlington Residence	65	0	5	53	7	N/A	N/A
	Arlington Residence - LOSP	Arlington Residence	67	0	5	53	9	N/A	N/A
	Bayview Hill Gardens - CoC	Bayview Hill Gardens	17	0	0	9	8	0	8
	Bayview Hill Gardens - HU...	Bayview Hill Gardens	29	0	0	16	13	0	13
	Bayview Hill Gardens - LO...	Bayview Hill Gardens	26	0	1	16	9	0	9
	Monterey Boulevard Apart...	Monterey Boulevard Apart...	4	0	0	1	3	1	2
Catholic Charities CYO	10th and Mission - LOSP	10th and Mission	44	0	0	26	18	1	17
	Edith Witt Senior Communi...	Edith Witt Senior Community	16	0	0	15	1	1	0
	Edith Witt Senior Communi...	Edith Witt Senior Community	11	0	0	10	1	0	1
	Hazel Betsey- CoC	Hazel Betsey Community	9	0	0	4	5	0	5
	Treasure Island Phase 1 a...	Treasure Island Phase 1 a...	66	0	0	62	4	0	4
Chinatown Community De...	1296 Shotwell- CoC	1296 Shotwell	14	0	0	10	4	1	3
	1296 Shotwell- GF	1296 Shotwell	8	0	0	8	0	0	0

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So… what about the OVT?

- The Offline Vacancy Tool is being retired!
  - Providers must record the offline status of units (begin or end offline status) within the ONE System once Phase 3 goes live
- Essential OVT dates:
  - Tuesday June 6th was the last day to update the OVT
  - As of today, it is no longer available for use
  - OVT will be available for view-only use through July
  - Any units to be set as offline or available should be done ***in ONE*** starting June 12th

What am I responsible for?

- Support Services
  - Enrollments and unit assignment **at move-in**
  - Annual assessments
  - Exits
  - Tracking eviction notices and unlawful detainers served
  - Ensuring program rosters are up to date and include all clients in your program
- Property Management:
  - Posting program openings (if program is limited availability)
  - Making units offline and ending offline status when unit becomes available
  - Ensuring clients are correctly associated with their current unit
  - Regularly monitor your building rosters to ensure accurate occupancy and availability

Important Next Steps

- There will very likely be discrepancies in the data that is live in ONE on June 12th.
  - Verified as of March for participating programs, but will not reflect recent move-ins, move-outs, or unit transfers.
- Both Support Services and Property Management staff should run program and building rosters and ***update records by June 22nd***
- HSH will have follow-up sessions with individual providers and program managers beginning the week of June 26th
- ***Starting June 12, every new client that is enrolled should be immediately assigned to a unit***

What if I need support?

- Office Hours
  - Tuesday 6/13: 11 am – noon
  - Thursday 6/15: 2 pm – 3 pm
  - Tuesday 6/20: 11:30 am – 12:30 pm
- Individual TA support sessions available in the afternoon on Thursday 6/22
- Follow up meetings scheduled beginning the last week of June
- Documentation (available on the help site)
  - Toolkits
  - Training slides and videos
- For initial questions, reply to communications from the ONE System team and/or join office hours
- Contact onesf@bitfocus.com for ongoing questions and unit updates

What’s Next: Unit-Specific Referrals

- What to expect
  - Training on new functionality
  - Unit assignment step will be automated for limited availability programs
- How to prepare
  - Ensure program rosters are up to date
  - Ensure building rosters are up to date
- Tentatively launching in late 2023

Reactions

- What is one word that describes how you feel about new Inventory functionality in ONE?
  Please answer in the chat!