



Bitfocus



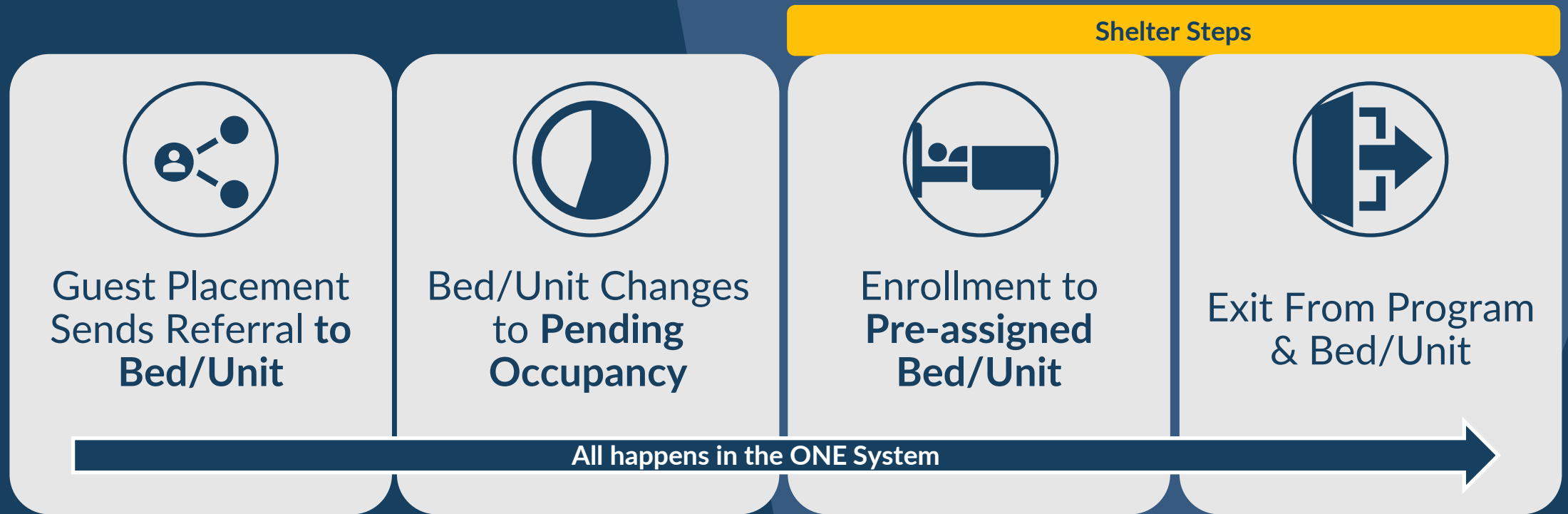
DEPARTMENT OF
HOMELESSNESS AND
SUPPORTIVE HOUSING

Adult and TAY Shelter Workflow

Congregate and Semi-Congregate

Temporary Shelter Workflow

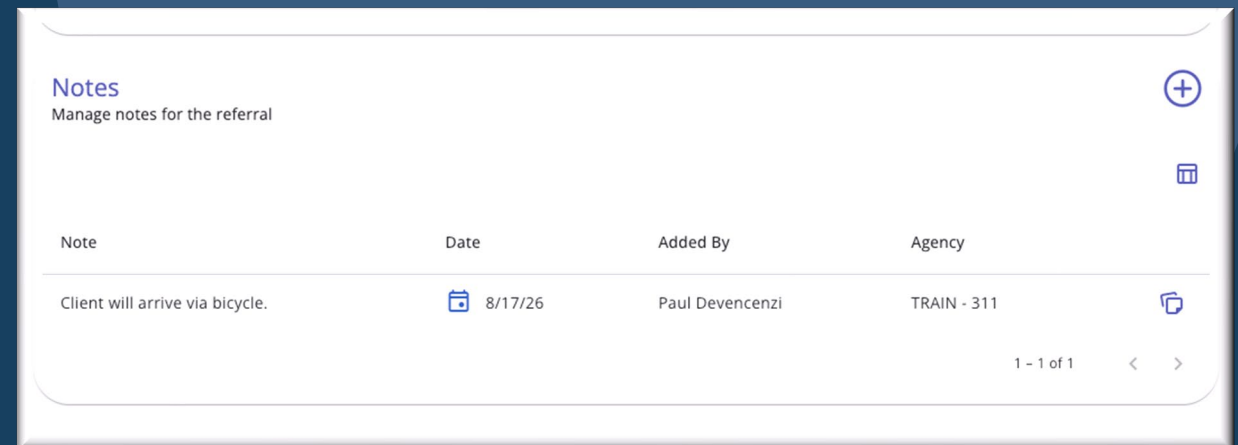
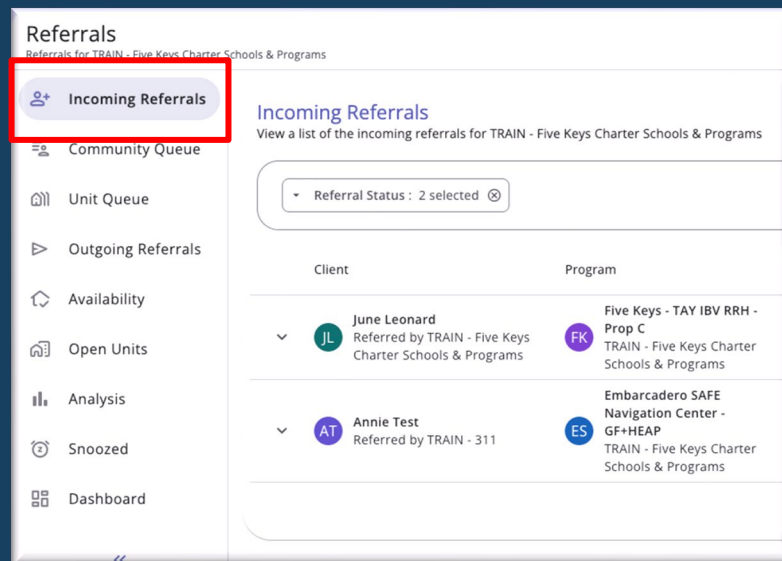
Temporary Shelter Workflow



Referral and Placement Steps

Receiving Referrals

- Monitor the **Incoming Referrals** tab for new clients who are referred to your program
 - The Referral Partner is listed in the *Referred By* field.
 - Check the Notes section as notes may be include in the referral
- For non-congregate sites: the referral is only made for the **Head of Household (HoH)**



REFER

ACCEPT

ENROLL

PLACE

Incoming Referrals Tab

Incoming Referrals

View a list of the incoming referrals for TRAIN - Five Keys Charter Schools & Programs

Referral Status : 2 selected

X Q



Client	Program	Referral Date ↑	Days Pending	Referral Status
June Leonard Referred by TRAIN - Five Keys Charter Schools & Programs	Five Keys - TAY IBV RRH - Prop C TRAIN - Five Keys Charter Schools & Programs	5/20/26 2 months 28 days ago	88 days	Pending 2 months 28 days ago
Annie Test Referred by TRAIN - 311	Embarcadero SAFE Navigation Center - GF+HEAP TRAIN - Five Keys Charter Schools & Programs	8/17/26 Today	0 day	Pending Today

1 - 2 of 2

- Shows referrals for the user's agency
- Filters allow you to refine your search
 - You can filter or sort the pending referrals by program

Denying Referrals

- Deny the referral if a client refuses placement or doesn't show
 - Denied by Type
 - Denied by Reason
 - Current Status: Denied
 - Denial Information: *please write in additional details*
 - Send to Community Queue: **No**

This step is very important! If not denied, beds will continue to show as Pending Occupancy

Denied by Type *

Client ▼

Denied by Reason *

Client did not show up or call ▼

Current Status *

Denied ▼

Denial Information *

↩ ↪ B I :: :=

Client did not show up for intake

Send to Community Queue *

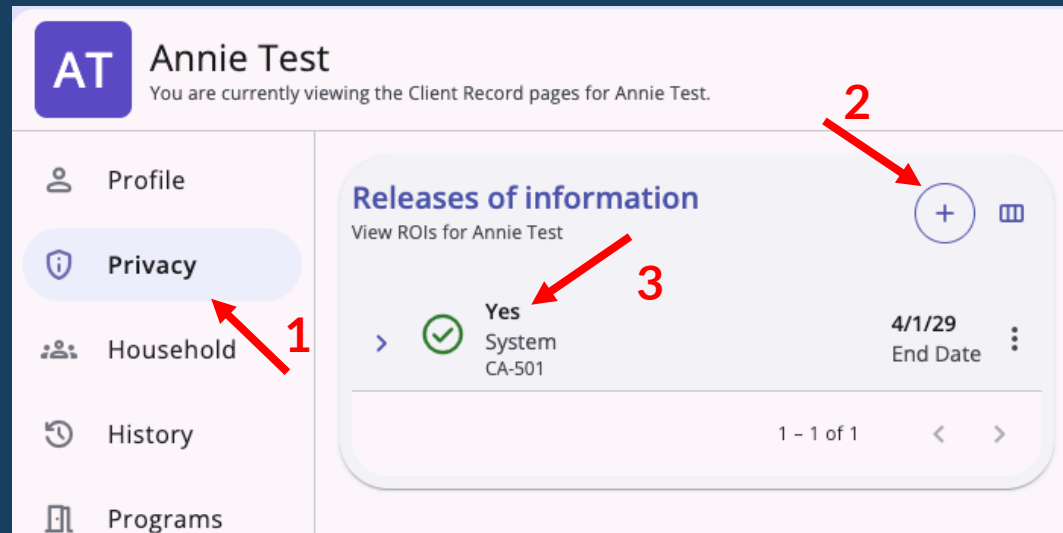
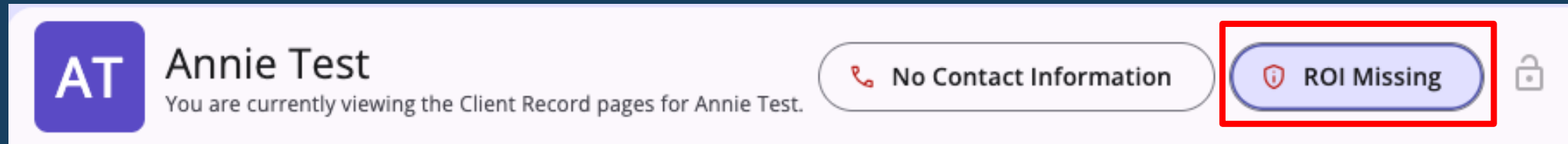
☒ No ☐ Yes

Accepting Referrals

- Check and add ROI, if missing
- Review and update client profile including household members
- Enrolling into the program completes the referral
- For non-congregate referrals, all household members should be enrolled together
- Bed/Unit will already be assigned

Accepting Referrals - Check and add ROI

- Check for current ROI
- Add ROI if missing or permission not provided



Add a new ROI through the client's privacy tab from their profile screen

Accepting Referrals – Review and Update Client Profile

- Ensure client profile is up to date and complete

The screenshot shows a web interface for managing a client profile. On the left is a sidebar with navigation links: Profile (selected), Privacy, Household, History, Programs, Services, Assessments, Units/Beds, and Care Team. The main content area is titled 'Annie Test' and 'Client profile information'. It contains several input fields and dropdown menus for personal information. A red rectangle highlights an 'Edit' button in the top right corner of the profile information section.

AT Annie Test
You are currently viewing the Client Record pages for Annie Test.

Annie Test
Client profile information

Social Security Number *
xxx-xx-8290

Quality of SSN *
Full SSN Reported

First name *
Annie

Last name *
Test

Middle name

Suffix
Select

Quality of Name *
Full name reported

Quality of DOB *
Full DOB Reported

Edit

Accepting Referrals

The screenshot shows the 'Annie Test' client record page. On the left sidebar, the 'Programs' tab is highlighted with a red box. The main content area is titled 'Program enrollments' and shows the 'Program enrollment history for Annie Test'. A red box highlights a '+' button in the top right corner of the enrollment history section. Below this, there is a search bar and a list of enrollments. The first enrollment is 'ECS: Mobile Access Point Coordinated Entry' with an 'Exit Date' of '7/10/26'. The page shows '1 - 1 of 1' results.

AT Annie Test
You are currently viewing the Client Record pages for Annie Test.

- Profile
- Privacy
- Household
- History
- Programs**

Program enrollments

Program enrollment history for Annie Test

Search

> **EM** ECS: Mobile Access Point Coordinated Entry 7/10/26 Exit Date

1 - 1 of 1 | < >

Accepting Referrals

Add program enrollment

1 Select program

Available Programs
Select the program for the enrollment

Name
ES Embarcadero SAFE Navigation Center - GF+HEAP Site H
FK Five Keys - Rapid Rehousing - Prop C
FK Five Keys - Rising Up Rapid Rehousing - Prop C
FK Five Keys - TAY IBV RRH - Prop C
FK Five Keys - TAY Rapid Rehousing - Prop C
ND Next Door Shelter Site S

11 - 16 of 16

Next

Shows you're enrolling in the correct program

Add program enrollment

Select program

2 Include household members (optional)

Select members (optional)
You can select other household members below to add to the enrollment or just leave this empty and save to continue.

Household Members

Annie Test

☒ Pablo Test

Back Next

For non-congregate shelters: Select all household members who are sharing a unit

Bed/Unit Assignment

- Bed/Unit will already be assigned
- For non-congregate shelters: Bed/ Unit assignment only shows in the HoH record
 - Non-HoH will not have a unit assignment

AT Annie Test
Expand this section to view more details about the client that this program enrollment is for. No Contact Information

ND Next Door Shelter
TRAIN - Five Keys Charter Schools & Programs
Emergency Shelter - Entry Exit 8/17/26 - Active 15 days ago

< nents **Units/Beds** Files Forms Assign >

Units/Beds
Manage agency-level occupancy and view all units/beds for Annie Test.

Unit / Bed	Start Date	End Date
B1 Bed 139 (311 Female Upper) Next Door	8/17/26	(No value)

1 - 1 of 1

Changing Beds/Units

Transferring Beds/Units



Staff can move clients to a different bed/ unit



End stay in current bed/unit
Action: Enter end date



Assign to new bed/unit
Action: Click *Add Unit/Bed*

Bed/unit can be changed when the client arrives, after enrollment

Unit Status/Availability

- *Unit Status* can be changed from the inventory dashboard
- Provides the ability to reflect a unit's status in real-time

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

Automatic Offline

- **Congregate Shelters:** units will default to available after a client exit
- **Semi Congregate Shelters:** some sites will have units automatically go offline for 24 hours after a client exit
- **Non-Congregate Shelters:** units will go offline for 1 week after a client exit

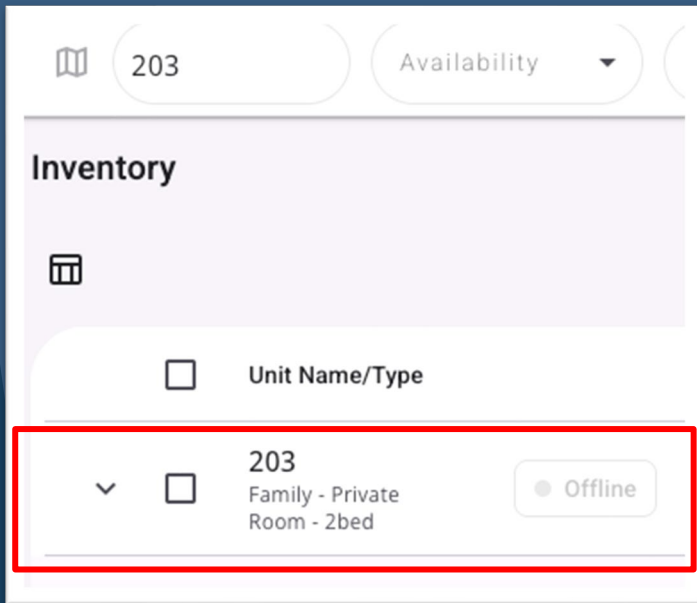
The screenshot displays a mobile application interface for managing unit status. At the top, a header bar shows a blue circle with the number '2', the unit number '203', a share icon, and an 'Offline' button. Below the header, a navigation bar has three tabs: 'Details', 'Occupancy', and 'Status', with 'Status' being the active tab. The main content area shows a list of units with a '+' icon to add more. A modal window is open, displaying the 'Offline' status for unit 203. The modal includes the following information:

- Offline** (8/18/26 - Today) with a toggle switch and an upward arrow.
- Start date**: 8/18/26, 12:00 AM, with a pencil icon for editing.
- Offline reason**: Automatically Set to Offline.
- Offline description**: Default offline status set automatically due to recent client exit from Unit/Bed.

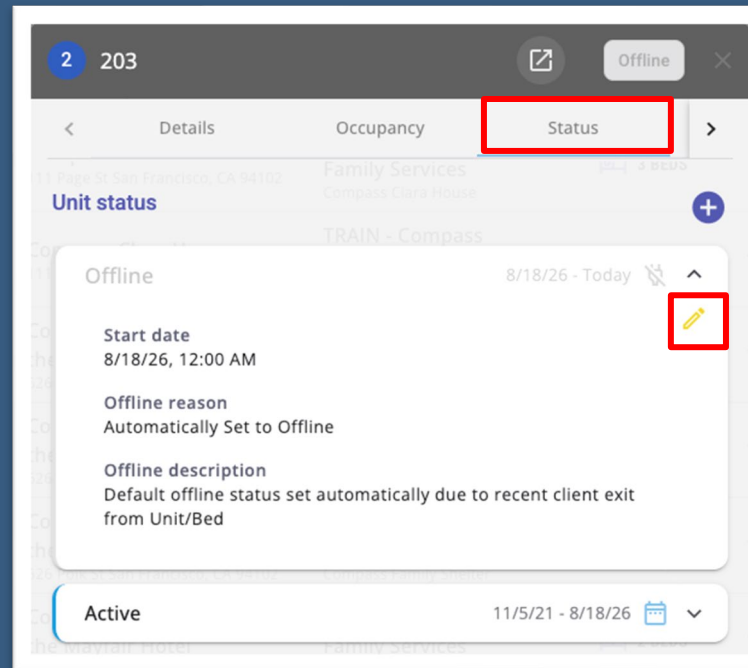
Below the modal, there is an 'Active' status bar showing the date range '11/5/21 - 8/18/26' with a calendar icon and a downward arrow.

How to Make a Unit Available

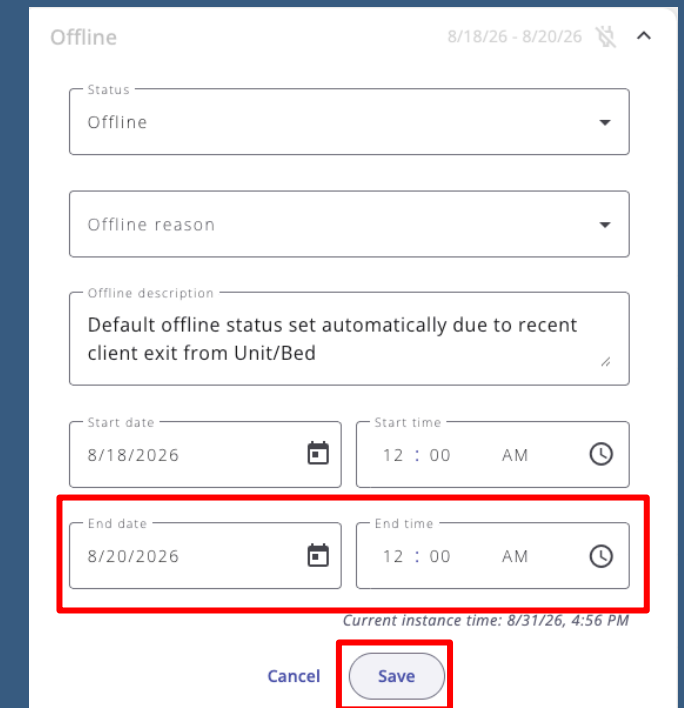
Find the offline unit in the Inventory module and click on it to open the unit card



Select the **Status tab** and click on the pencil icon next to the most recent offline status



Add an end date and click **SAVE** at the bottom of the card to make the unit Available



Changing Beds/Units

End Current Bed/Unit Stay

- Add an end date to the current bed/unit

The screenshot shows the 'Units/Beds' section of a software interface. The 'Units/Beds' tab is highlighted in the top navigation bar. Below the navigation bar, there is a search bar and a table with columns 'Unit / Bed', 'Start Date', and 'End Date'. The table contains one entry: 'B1 Bed 139 (311 | Female | Upper) Next Door' with a start date of '8/17/26' and an end date of '(No value)'. An 'Edit' button is visible next to this entry. A modal window titled 'Unit/Bed Occupancy' is open, showing the 'End Date & End Time' section with a date of '08/18/2026' and a time of '6:15 PM'. The 'Start Date & Start Time' section shows '08/17/2026' at '4:30 PM'. The modal also has 'Cancel' and 'Save' buttons at the bottom.

Assign to a New Bed/Unit

- Assign the client (or HoH for non congregate shelters) to a new bed/unit
 - Start date should not overlap with end date of old bed/unit

The screenshot shows the 'Unit/Bed Occupancy' modal window. The 'Add' button is highlighted in the top right corner. The modal contains fields for 'Start Date & Start Time' (08/18/2026, 12:00 PM) and 'End Date & End Time' (blank, Time). There are checkboxes for 'Eligibility Override' (checked) and 'Include Partially Available Units' (unchecked). The 'Available Units / Beds' section shows a dropdown menu with the selected unit 'Bed 101 (Journey Home | Male | Lower | Accessible) (Ne)'. The modal also has 'Cancel' and 'Save' buttons at the bottom.

Exits

Exiting Client from Unit

- Exits should occur when a client is no longer staying at the shelter
- Exiting from a program will automatically exit the client from their bed/unit
- Non-congregate shelters should complete an exit for all household members

The screenshot shows the client profile for Annie Test. At the top, there's a header with the client's name and a 'No Contact Information' button. Below this, a section for 'Next Door Shelter' is visible, indicating the client is 'Active' as of 8/17/26. A navigation bar at the bottom includes options like 'Units/Beds', 'Files', 'Forms', 'Assigned Staff', and an 'Exit' button, which is highlighted with a red box. Below the navigation bar, there's a 'Program enrollment: Exit' section with a sub-header 'Exit Annie Test from Next Door Shelter' and an 'Add' button with a plus icon, also highlighted with a red box.

The screenshot shows the 'Units/Beds' section for Annie Test. It includes a search bar and a table with the following data:

Unit / Bed	Start Date	End Date
B1 Bed 139 (311 Female Upper) Next Door	8/17/26	8/18/26

The 'End Date' 8/18/26 is highlighted with a red box.

Exit Reason and Destination

- Exit Reason and Destination must be entered
- Exit Reason and Destination should align

Example: If Exit Reason is “Exit to Permanent Housing”, then Destination should reflect permanent housing

Some common Reason and Destination combinations

Exit Reason	Destination
48- Hour Bed Abandonment	No Exit Interview Completed
Intersystem Transfer	Emergency Shelter
Exit to Permanent Housing	Rental by Client, with Housing Subsidy
Exit to Transitional Housing	Transitional Housing
Exit to Institutional Setting	Hospital
	Substance Use Treatment

Rule Violation Exit Reason and Program Restrictions

- Exit Reason of “**Rule Violation**” indicates a Denial of Service (DoS)
- Indicate the rule violation that caused the DoS
- Exit Destination must also be entered. Typically, it is “No exit interview completed.”

Program Exit Date
08/18/2026

Exit Reason
Rule Violation

Destination *
No exit interview completed

 You have selected Rule Violation as the Exit Reason. After you click Save & Close at the bottom of this page, add a Program Restriction using the grey menu on the right.

Exit Comment
Client was DoS'd for fighting

If the client is being denied future services due to their DoS, please enter a Program Restriction

Enter Denial of Service (Program Restriction)



- Enter denial of service as a Program Restriction



- Found in the Restrictions section of the client's profile



- Enter restrictions for any household member it applies to



- Can be edited after the initial creation

Adding a Program Restriction

AT

Annie Test

Expand this section to view more details about the client that this program enrollment is for.

Care Team

Notes

Alerts

Files

Forms

Contacts

Location

Referrals

Restrictions

Program Restrictions

Manage program restrictions for Annie Test

Search

No results yet!

Results will be displayed here when they are available.

Add

New Program Restriction

Add a restriction for Annie Test

Start Date *

08/31/2026

MM/DD/YYYY

End Date

08/30/2027

MM/DD/YYYY

Program(s) *

Next Door Shelter

Reason for Program Restriction *

1b Acts of violence.

Note

Guest engaged in violence with other guests

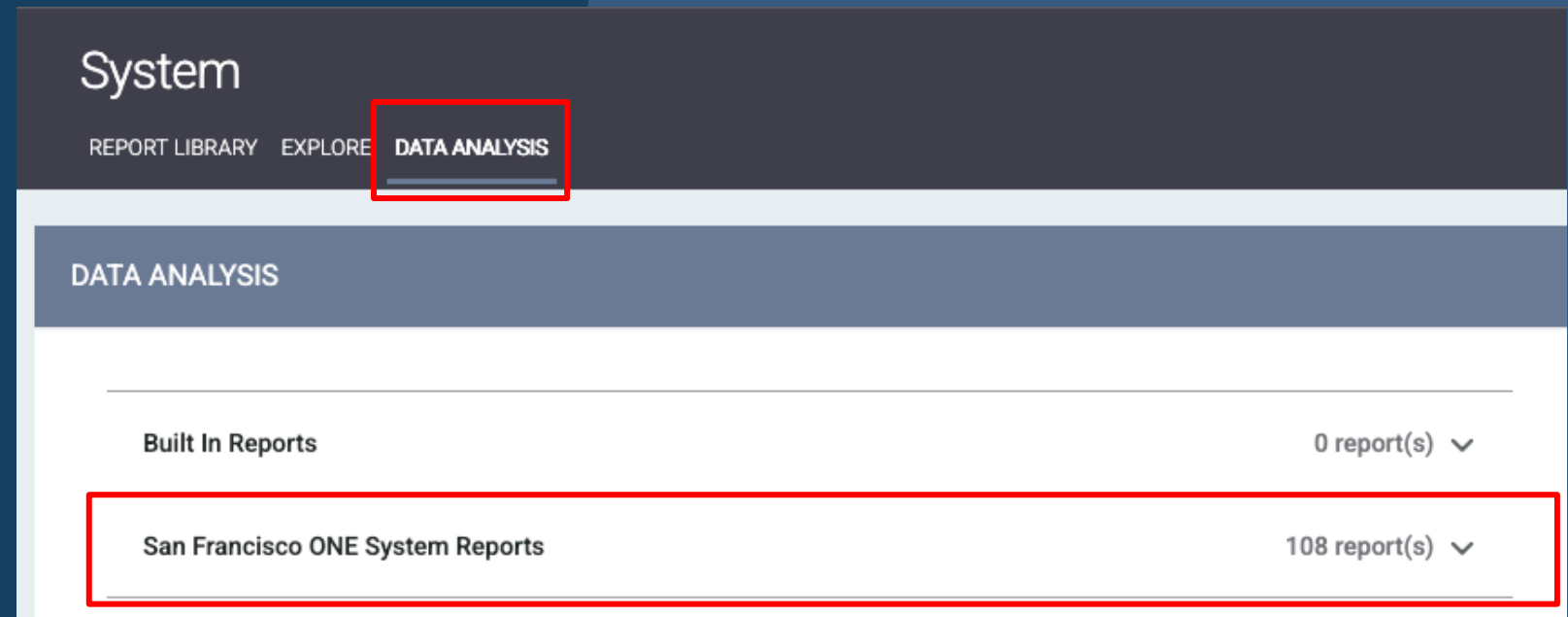
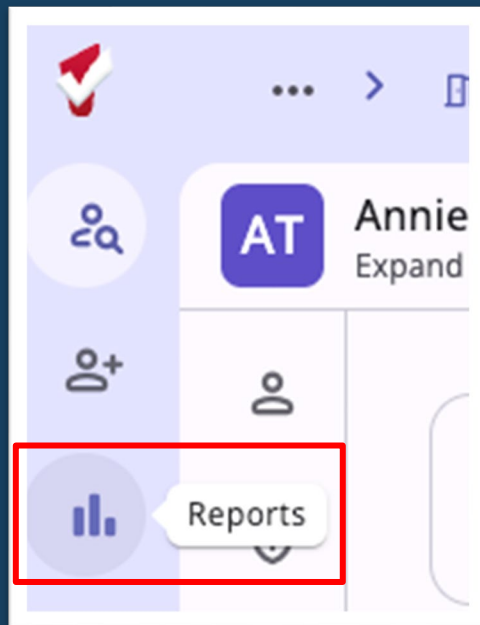
Cancel

Save

Reports

Inventory Reports

- Located under the *Data Analysis Tab*



Inventory Reports

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

*Inventory - Temporary Shelter	
Temporary Shelter - Bed Assignments and Statuses	⏮ RUN
Temporary Shelter - Bed/Unit Roster	⏮ RUN
Temporary Shelter - Client Roster	⏮ RUN

Bed/Unit Roster

- Roster organized by bed/unit number
- All beds/units in your site with associated client (or no client)

Units by Status										
	Building ^	Bed/unit Name ^	Unit Configuration	Current Availability	Offline Reason	Offline Description : ↕	Head of Household	Unique Identifier	ONE Profile link	Occupancy Start Date
1	711 Post	Bed 104	Adult - Single ...	Available			∅	∅	∅	∅
2	711 Post	Bed 106	Adult - Single ...	Offline	HSG/SHLTR - J...	Needs to be cleaned	∅	∅	∅	∅
3	711 Post	Bed 107a	Adult - Single ...	Available			∅	∅	∅	∅
4	711 Post	Bed 107b	Adult - Single ...	Available			∅	∅	∅	∅
5	711 Post	Bed 108a	Adult - Single ...	Occupied			Diego Test	5E97A9DD9	142542 ...	2026-06-08
6	711 Post	Bed 108b	Adult - Single ...	Available			∅	∅	∅	∅
7	711 Post	Bed 108c	Adult - Single ...	Available			∅	∅	∅	∅
8	711 Post	Bed 108d	Adult - Single ...	Occupied			Mama Bear	815081A00	142378 ...	2026-06-10

Client Roster

- Roster organized by client name
- All clients at your site with client information and associated bed

Temporary Shelter Client Roster								
	Client ^	Unique Identifier	Date of Birth Date	Link to ONE system profile	Program ^	Program Start Date	Unit Assignment	Occupancy Start Date
1	Dana Scully	655D072BE	1963-04-04	142517 ...	711 Post	2026-05-28	Ø	Ø
2	Diego Test	5E97A9DD9	1960-12-06	142542 ...	711 Post	2026-06-08	Bed 108a	2026-06-08
3	Harry Potter	1E6790D1D	2004-06-06	142321 ...	711 Post	2026-05-19	Ø	Ø
4	Mama Bear	815081A00	1990-07-07	142378 ...	711 Post	2026-06-10	Bed 108d	2026-06-10

Next steps & Support

Resources

Bitfocus Help Desk for any questions and technical support

- onesf@bitfocus.com
- 415.429.4211

ONESF Help Center Website:

- Documentation available at:
<https://onesf.bitfocus.com/temporary-shelter>
 - Tip Sheets (Desk Guide)
 - Training slides and videos

Help Desk Widget (on the ONESF Help Center Website)

