



Adult and TAY Temporary Shelter ONE System Workflow Toolkit

Updated September 2026

Inventory in the ONE System allows for precise tracking of units, beds, and associated clients for Temporary Shelters. As you use this guide, please note that in the context of Temporary Shelter, “units” and “beds” are interchangeable terms depending on the program.

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Monitor Incoming Referrals



The Referrals tab displays incoming guest referrals. Email alerts can also be configured to alert you via email every time a referral is sent to your site. If you would like email alerts configured, please reach out to onesf@bitfocus.com.

Overview

Use the **Referrals** tab to monitor incoming referrals to your shelter site. Only sites that receive referrals from Guest Placement will receive referrals in this tab. A client's profile can be accessed directly from the Referral tab and enrolled to a program.

Step by Step

1. Select the **Referrals** tab in the primary navigation menu of the ONE System. You can expand or collapse the vertical menus using the >> button at the bottom.
2. Under **Incoming Referrals**, all active referrals to your Agency will be displayed. The program destination for each client is displayed next to their name. Please note that only the Head of Household will appear in the Pending Referrals tab.

Incoming Referrals
View a list of the incoming referrals for TRAIN - Compass Family Services

Referral Status: 2 selected

Client	Program	Referral Date	Days Pending	Referral Status
Minnie Mouse Referred by TRAIN - San Francisco Family Coordinated Entry Agency	Compass Family Shelter TRAIN - Compass Family Services	9/22/26 Today	0 day	Pending Today

Referral destination

1 - 1 of 1

Since all referrals to your Agency are shown, you may see referrals to multiple programs. You can use the *Program* column to sort referrals by program or use the *Search* bar to search for a client name.

3. Click the client's entry on the list to open their program referral. You can proceed to the next section of this guide.



Accept and Enroll Clients in Program



Enroll clients the day that they arrive on site. If they do not arrive, deny the referral as soon as you know they are not coming, or by the end of your intake window.

Overview

Enroll clients in the program as soon as possible when they arrive. Navigate to the client profile and the **Programs** tab in their record. Select the correct program under **Available Programs**. Ensure that the program is marked as “Pending Referral”. *If you do not see this note, please contact the Guest Placement team.* Enroll the client.



Please note that couples at non-congregate sites have special considerations when completing enrollments. Look for the corresponding icons below to ensure proper enrollment. These steps only apply to non-congregate sites! Congregate and semi-congregate sites should enroll couples individually to their own bed.

1. From the **Incoming Referrals** list, click the client’s name you wish to enroll to view the program referral. From the program referral, you can select the **View Client** button to open the client’s record. You can also open the client’s record directly from search. Once in the client record, open **Programs** on the client menu, and hit the (+) plus sign button to add a new program enrollment.

Referrals
Referrals for TRAIN - Compass Family Services

Incoming Referrals
View a list of the incoming referrals for TRAIN - Compass Family Services

Referral Status: 2 selected

Client	Program	Referral Date	Days Pending	Referral Status
Minnie Mouse Referred by TRAIN - San Francisco Family Coordinated Entry Agency	Compass Family Shelter TRAIN - Compass Family Services	9/22/26 Today	0 day	Pending Today

Program Referral
Compass Family Shelter referral for Minnie Mouse

Pending

Check-In View Client

Referral
Edit referral details



Minnie Mouse
You are currently viewing the Client Record pages for Minnie Mouse (C2371F020).

Program Referral **No Contact Information**

Program enrollments
Program enrollment history for Minnie Mouse

Programs

Program Name	Entry Date	Exit Date	Created by
HSH Staff Coordinated Entry TRAIN - San Francisco Family Coordinated Entry Agency	9/22/26 Today	Active	Test User TRAIN - San Francisco Family Coordinated Entry Agency Added by Test User from primary agency TRAIN - Department of Homelessness and Supportive Housing

2. The **Add program enrollment** screen will open from the right-hand side. In step 1, you will be prompted to select a program. You might need to scroll to find the appropriate program. The program will be flagged to show it has an active referral. Select the program and click **Next**.

Add program enrollment

1 Select program

Available Programs
Select the program for the enrollment

Name

- Compass Family Shelter** Pending Referral to Unit: 101 (Referral date: 9/22/2026)
- ESG-Compass Homeless Prevention Program**
- SF HOME-HPA GF**

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Next

3. In step 2, you will be prompted to include household members. Be sure to toggle **ON** all members of the household who are part of the stay.



For enrollments at **congregate and semi-congregate sites**: Be sure to enroll each household member separately. This will allow them to correctly be assigned to their individual beds. You will process each referral *separately*.

A screenshot of a web application interface. At the top, a header bar contains a blue circle with the number '2' and the text 'Include household members (optional)'. Below this, a light blue rounded rectangle contains the heading 'Select members (optional)' and a subtext: 'You can select other household members below to add to the enrollment or just leave this empty and save to continue.' Underneath, the text 'Program Placement a result of Referral to 101 provided by TRAIN - San Francisco Family Coordinated Entry Agency' is displayed. Below that is the section 'Household Members'. It lists 'Minnie Mouse' and 'Mickey Mouse'. Next to 'Mickey Mouse' is a blue toggle switch with a white checkmark, indicating it is turned on. At the bottom of the form are two buttons: 'Back' and 'Next'.

For couples at **non-congregate sites**, ensure the toggle for **Household Members** is turned **ON** for any group member who is part of this stay.

4. Complete the entry screens for all household members, answering all questions.

Assign Client to a Bed – Self-Enrollment Sites *ONLY*

If a referral to your site does not come with a bed already assigned, you will need to assign a bed *after* you've enrolled the client (see previous section for prior steps). Please note: as of September 2026, this only applies to Dolores Shelter and Kinney Hotel Stabilization Rooms.

1. Within the client's program record, select the **Units/Beds** tab.

The screenshot shows the client record for Minnie Mouse (C2371F020). The 'Units/Beds' tab is selected and highlighted with a green box. A plus sign button in the bottom right corner is also highlighted with a green box.

2. Select the (+) plus sign button to Add a Unit/Bed Occupancy.
3. In the right-side window, confirm/update the start date and time. This is the first night the client is sleeping in the bed. Under **Available Units/Beds**, select **Client Profile Only** to expand the choices. If an error message occurs when selecting **Available Units/Beds**, turn on the **Eligibility Override** toggle and try again.
4. Select the correct bed, and hit **Save** to assign the client into their new bed.

The screenshot shows the 'Add a Unit/Bed Occupancy' form. The 'Start Date & Start Time' field is highlighted with a green box. The 'Client Profile Only' option is selected under 'Available Units/Beds'. The 'Select Unit / Bed' dropdown is highlighted with a green box.

Deny a Referral

Overview

If a client refuses placement or does not show up for their reservation, you will need to **deny** the referral. Follow the instructions below carefully to ensure the referral is properly processed. This step is very important—if a referral is not denied, the bed will continue to appear as Pending Occupancy and you will be unable to accept another guest to the bed.

From **Referrals** in the primary navigation menu, select **Incoming Referrals** to see all pending referrals for your agency.

Referrals
Referrals for TRAIN - Compass Family Services

Incoming Referrals
View a list of the Incoming referrals for TRAIN - Compass Family Services

Referral Status : 2 selected

Client	Program	Referral Date	Days Pending	Referral Status
Minnie Mouse Referred by TRAIN - San Francisco Family Coordinated Entry Agency	Compass Family Shelter TRAIN - Compass Family Services	9/22/26 Today	0 day	Pending Today

1 - 1 of 1

Select the client referral that you need to update. Clicking on the entry will open the referral record. Within the referral, click the pencil icon in the top right corner to edit the referral:

Program Referral
Compass Family Shelter referral for Minnie Mouse

Pending

Check-In View Client

Referral
Edit referral details

Referred Program
Compass Family Shelter

Referred Unit
101

Current Status *

Pending

Pending

Denied

Expired

Pending - In Process

Manage notes for the referral

Scroll to the bottom of the referral record and update the **Current Status** field. When you change the status from Pending to **Denied**, additional fields



will appear on screen to be completed.

Once you have selected Denied from the **Current Status** menu, additional fields will appear. Select the appropriate denial type and reason. Below is an example of what to choose if the family refuses placement and says they are no longer interested in shelter. In cases where the family was referred to the wrong program, was found ineligible for the program, or had a reasonable accommodation the shelter could not fulfill, please select "Yes" for the "Send to Community Queue" dropdown.

Current Status	Denied
Denied By Type	Client
Denied by Reason	Client refused services OR Client did not show up or call
Denial Information	Please enter note with additional details
Send to Community Queue	No



Denied by Type *

Client

Denied by Reason *

Client refused services

Current Status *

Denied

Denial Information *

↶ ↷ B I :: ☰

Client came to shelter but stated they did not want to stay.

Status Date *

09/23/2026

2:01 PM

Send to Community Queue *

☒ No
☐ Yes

Cancel

Save

Then click **Save Changes** to complete the denial.



Transferring a Client to a New Unit/Bed

When a family needs to switch units/beds, begin by searching for the head of household. Open their profile, select Programs from the client menu and then open the appropriate program. Navigate to the Units/Beds tab on the program menu. After adding an end date to their current occupancy, add their new Unit/Bed.

1. Open the client's profile and navigate to their current enrollment at your site. Under the **Units/Beds** tab, you will see their current bed assignment. Changes can be made by clicking the action menu (three dots) on the right and selecting **Edit**.

The screenshot displays the HSH ONE System interface. At the top, the header shows 'Compass Family Shelter' and 'TRAIN - Compass Family Services'. The 'Units/Beds' tab is selected in the navigation bar. Below the header, a table lists the current occupancy for '101 Compass Family Shelter at the Mayfair Hotel' with a start date of '9/23/26'. An action menu (three dots) is visible next to the entry, with the 'Edit' option highlighted. A modal titled 'Edit Occupancy' is open, showing the 'Unit/Bed Occupancy' details. The 'Start Date & Start Time' is set to '09/23/2026 2:15 PM'. The 'End Date & End Time' is set to '09/24/2026 3:30 PM'. The 'Save' button is highlighted.

Compass Family Shelter
TRAIN - Compass Family Services
Emergency Shelter - Entry Exit

9/23/26 - Active
Today

Events Assessments Notes **Units/Beds** Files Forms Assigned Staff Exit

Units/Beds
Manage agency-level occupancy and view all units/beds for Minnie Mouse.

Unit / Bed	Start Date	End Date
1 101 Compass Family Shelter at the Mayfair Hotel	9/23/26	(No value)

Edit

View Audit Log

Delete

Edit Occupancy

Unit/Bed Occupancy

Title
101
Compass Family Shelter at the Mayfair Hotel

Start Date & Start Time
09/23/2026 2:15 PM

End Date & End Time
No value

Edit Occupancy

Unit/Bed Occupancy

Title
101
Compass Family Shelter at the Mayfair Hotel

Start Date & Start Time *

09/23/2026 2:15 PM

End Date & End Time

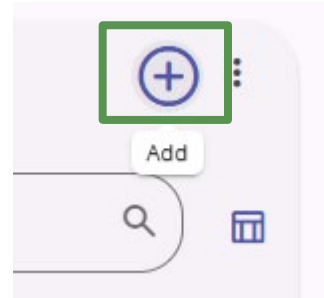
09/24/2026 3:30 PM

Cancel Save

2. An end date and time must be entered to end their current bed assignment. Select the **Save** button to update the record.



3. Stay on the Units/Beds tab and select the (+) plus button to assign a new bed.



4. The Add a Unit/Bed Occupancy screen will appear. Fill in the start date and *leave the end date blank*. Turn **on** the **Eligibility Override** toggle. Under the **Available Units/Beds** list, select the new bed. Click **Save** to assign the client to their new unit/bed.

A screenshot of a mobile application screen titled "Add a Unit/Bed Occupancy" with a close button (X) in the top right corner. The screen has a light purple background. At the top, there is a section titled "Unit/Bed Occupancy" with a lock icon and the subtitle "Assigning occupancy for Minnie Mouse". Below this, there are two input fields for "Start Date & Start Time *". The first field contains "09/24/2026" and has a calendar icon. The second field contains "4:00 PM" and has a clock icon. Below these are two input fields for "End Date & End Time". The first field is empty with a placeholder "___/___/___" and a calendar icon. The second field contains "Time" and a clock icon. Below the end date fields, there are three toggle switches. The first toggle, labeled "Eligibility Override", is turned on and is highlighted with a green rectangular box. The second toggle, labeled "Include Partially Available Units", is turned off. The third toggle, labeled "Include Group Members", is turned off. Below the toggles, there is a section titled "Available Units / Beds *". It contains a dropdown menu with the text "Select Unit / Bed" and a list item "202 (Compass Family Shelter at the Mayfair Hotel, Compa" with a downward arrow. A green arrow points to this dropdown menu. At the bottom of the screen, there are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a green rectangular box. A green arrow points to the "Save" button.

Note: If you do not see the desired unit/bed in the dropdown menu, check that you have *Eligibility Override* toggled ON. If the unit/bed still does not appear, make sure the unit is available for the date and time you have selected.

Exit Client from a Program



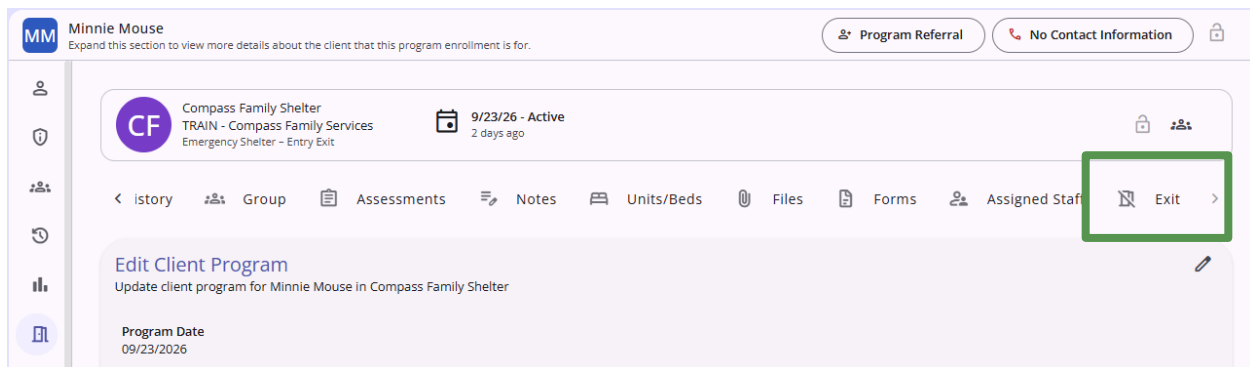
Exiting a client from a program also exits them from their bed.



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

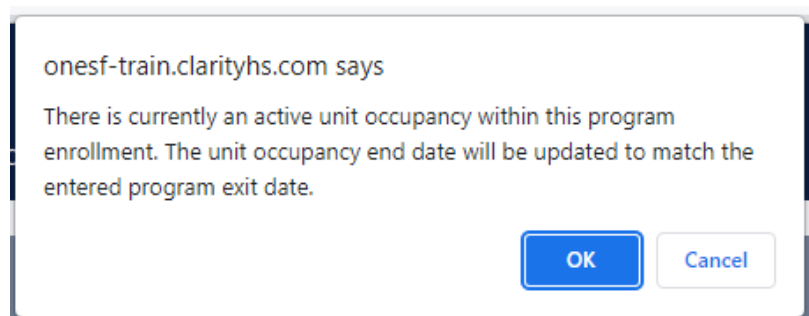
Exiting a client from the program will also exit a client from their assigned bed. Exit the client from the program by selecting the appropriate client, navigating to the program, and choosing 'Exit'.

1. Open the client record by searching for the client, selecting **Programs** from the client menu, opening the appropriate program and scrolling to the far right on the program menu to select **Exit**. You can also open the program record directly by selecting the client from your **Caseload** list.
2. Select the **(+)** plus button to add a program exit. Include any applicable household members. Complete all exit screens. *If you are exiting the client with a Denial of Service, see next section.*



3. By exiting the client from the program, they will also be automatically exited from the bed or unit. Once the client 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:

NOTE: If the entire family is not exiting, then exiting a household member without a unit assignment won't impact the unit/bed assignment of other household members (e.g., the head of household).

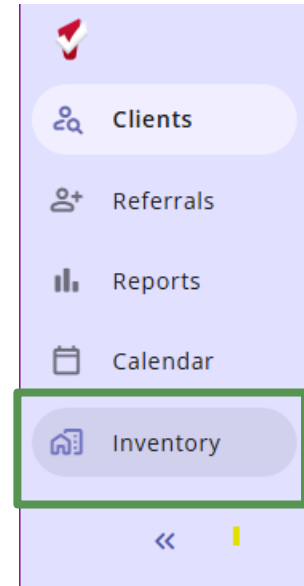


Change the Offline Status of a Unit/Bed

If a unit/bed needs repairs, cleaning, or is otherwise temporarily unavailable, the bed status can be set Offline. Any time a bed is unavailable for a client to occupy right away, it should be set to Offline. Changing bed status is done on the Inventory Dashboard. Once the bed is ready for occupancy, you can end the Offline period to make it Available for a new referral.

Make a Unit or Bed Offline

1. Go to the **Inventory Dashboard**, which can be found under the primary navigation menu.
2. Select the Building by using **Building** filter at the top of the page.
3. Select the appropriate unit to see the unit's pop-up display card. Click the **Status** button, then find the **(+)** to add an offline status.
4. Select **Offline** under **New Status** (do not use Inactive). Select the appropriate offline reason and add in any needed notes. Select the appropriate Start date and Start time. Leave the **End date** blank. Click **Save**.



Bed 008
Adult - Lower Bunk - Congregate (Shelter)
655 S Van Ness Ave, San Francisco, CA

Available

United Living International | Evergreen Emergency Shelter
Evergreen Emergency Shelter | Evergreen Emergency Shelter
Local or Other Funding Source

Unit status

Unit status	Period	Actions
Active	9/4/24 - Today	[Calendar icon] [Dropdown arrow]
Offline	9/4/24 - 9/4/24	[X icon] [Dropdown arrow]

New status

Status: Offline

Offline reason: HSG/SHLTR - Janitorial/Maintenance

Offline description: Bed frame is not level - needs repair

Start date: 10/17/2024 | Start time: 05 : 45 PM

End date: | End time:

Current instance time: 10/17/24, 5:45 PM

CANCEL SAVE

Note: If you know when the bed will become available, you can enter an End Date. However, note that the bed will automatically become available at that time. If there is a chance the bed will not be ready for occupancy, do not enter an End Date to avoid the possibility of a referral without a vacant bed.



Make a Unit or Bed Available

- When a unit/bed is ready to be Available, you need to **end the Offline status**. Open the **Status** section again. Find the most recent **Offline Status**, which will be grey. Click the status entry to expand:

The screenshot shows the HSH ONE System interface. On the left, there are two bed entries: Bed 008 and Bed 009. Bed 008 is marked 'Available' and Bed 009 is marked 'Occupied'. A green arrow points from the 'Available' button of Bed 008 to the 'Status' tab in the 'Unit status' section of Bed 008. The 'Unit status' section shows an 'Offline' status for 10/22/24 - Today, with a yellow pencil icon next to it.

The screenshot shows the 'Offline' status edit form. The form includes fields for Status (Offline), Offline reason (HSG/SHLTR - Janitorial/Maintenance), Offline description (Bed frame is not level - needs repair), Start date (10/1/2024), Start time (09:00 AM), End date (10/22/2024), and End time (11:00 AM). A green box highlights the End date and End time fields. The current instance time is 10/22/24, 11:06 AM. Buttons for CANCEL and SAVE are at the bottom.

- Select the yellow pencil tool to **edit** this Offline status.

- Add an **End date** and **End time** to the Offline status. When the end time has passed, the bed will revert to Available.

Note: choosing a time that has already passed will update the status immediately.

- When you press Save, a pop-up will prompt you to confirm that this will set the unit to Active. Select **Confirm**. The unit will now be Available.

Data on offline reasons is included in reporting and decision-making, so it is important to select the most accurate and appropriate reason when marking a bed offline.



The Offline End Date is set to 10/22/2024 11:00 AM. This Unit will automatically become Active after the assigned 'Offline' period ends, and an Active status record will be added on 10/22/2024 11:00 AM if there are no future date unit status records that begin on that date.

BACK

CONFIRM



Offline Reason Name	Definitions
Automatically Set to Offline	The unit or bed was automatically set to offline with this reason by the system when the previous household was exited from the program. <i>Note that congregate shelters do not have this status.</i>
HSG/SHLTR – Janitorial/Maintenance	The unit or bed is unavailable for client placement due to janitorial or maintenance needs.
HSG/SHLTR – Property Hold	The unit or bed is unavailable due to a property hold. This status can be used for management needs that are not covered by other offline reasons. Always include notes explaining the circumstance.

Important Notes

In cases where a client is occupying a unit/bed that needs repairs, the process for [Transferring a Client to a New Bed](#) (page 9) should be followed to transfer the client to another unit. The unit/bed in need of repair should then be set Offline following the process described above.

If a unit needs to be set to permanently offline, please contact your HSH Program Manager to have the status set to Inactive. Do not set units to Inactive without contacting HSH.

If a bed remains offline but the reason for it being offline changes, a new offline status should be added to ensure the history of the bed is accurately recorded. For example, if a unit/bed is offline for Janitorial/Maintenance and then is subsequently unavailable due to a property hold, each window of time should be reflected in a unique offline status.



Denials of Service (Logged as Programs Restrictions in ONE)

Denial of Service (DOS) describes a situation where a client commits a shelter rule violation that results in an exit from the program and a period during which the client cannot return to the shelter. All Denials of Service must be logged using the *Program Restrictions* functionality in ONE, which will prevent any referrals to the program during the DOS period.

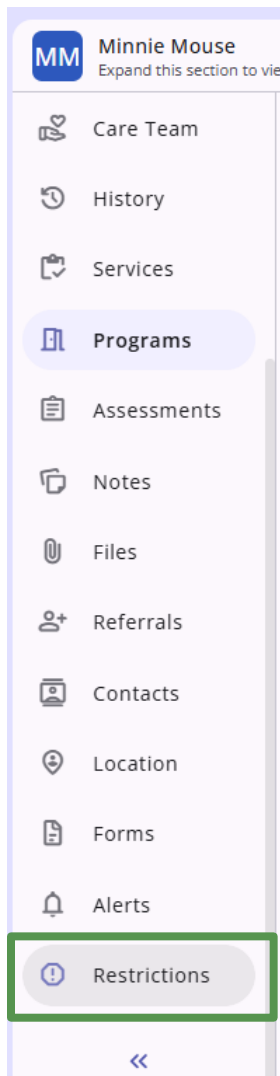
1. Open the client profile and navigate to their current enrollment at your site. Select the **Exit** button on the far right side of the client menu. (See [Exiting a Client from a Program.](#))
2. Select "Rule Violation" from the *Exit Reason* field dropdown. You will see a warning message (⚠️) directing you to add a Program Restriction after saving the exit.
3. You will see another warning (⚠️) at the bottom of the exit screen reminding you to add a Program Restriction after saving the exit. Complete all the exit screens to save the exit.



You have selected Rule Violation as the Exit Reason. You must also add a Program Restriction to record a Denial of Service (DOS). After you click Save & Close, go to the Restrictions section in the client menu to the left. If issuing a Permanent DOS, leave the End Date of the Program Restriction blank.

4. Program Restrictions are logged within the **Restrictions** tab of the client record. Scroll to the bottom of the client menu to find it. Select the (+) plus sign button to add a new DOS.





5. This will open the **Add a Program** Restriction screen. Enter the **Start Date** and **End Date** of the DOS. The **Program(s)** dropdown will default to the program from which you just exited the client. Choose the reason for the DOS in the **Reason For Program Restriction** dropdown field and enter any additional information in the **Note** text box.

6. Click **Save** to complete the Program Restriction.

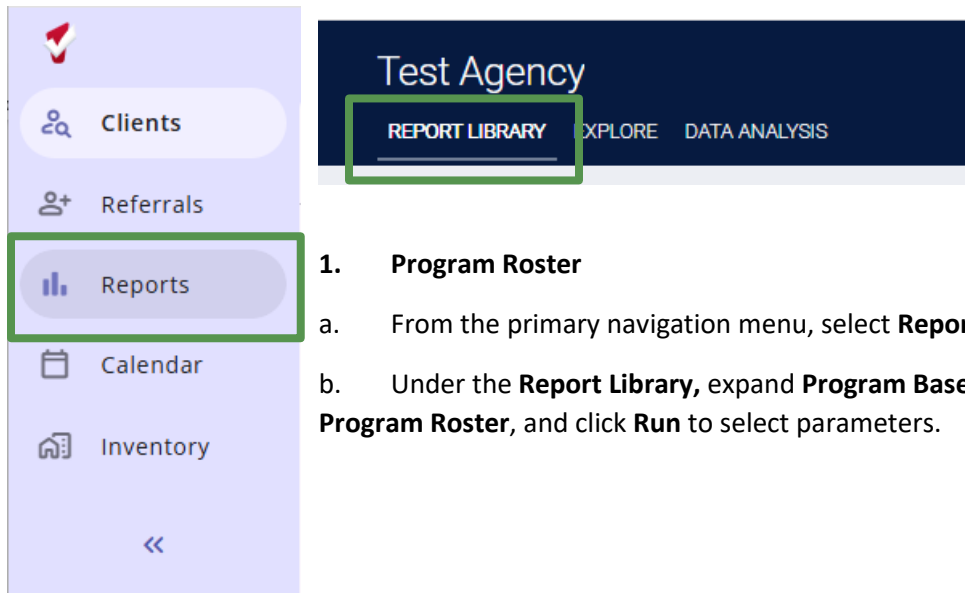
7. If needed, you can view or edit a DOS within the client's Restrictions tab. Click the entry to open the item, and then select the pencil icon to edit the restriction. Restrictions are also visible in the client information box at the top of the client record.

A screenshot of the 'Add Program Restriction' form in the application. The form has a title bar 'Add Program Restriction' with a close icon. Below the title is a section 'New Program Restriction' with a subtitle 'Add a restriction for Minnie Mouse'. The form contains several fields: 'Start Date *' with a date picker showing '09/24/2026'; 'End Date' with a date picker showing '12/24/2026'; 'Program(s) *' with a dropdown menu showing 'Compass Family Shelter'; 'Reason for Program Restriction *' with a dropdown menu showing '2h Verbal harassment, intimidation or bullying of other gu...'; and a 'Note' section with a rich text editor showing 'Enter notes here'. At the bottom of the form are two buttons: 'Cancel' and 'Save'.

Review Reports for Accuracy

Review rosters 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**.

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. From the primary navigation menu, select **Reports**.
- b. Under the **Report Library**, expand **Program Based Reports**. Find **Program Roster**, and click **Run** to select parameters.

Program Based Reports

22 report(s) ^

[EMPL-101] Employment Report	★ ⌚ RUN 📅 SCHEDULE MORE INFO ▾
[EMPL-102] Employment / Education Report	★ ⌚ RUN 📅 SCHEDULE MORE INFO ▾
[EXIT-101] Potential Exits	★ ⌚ RUN 📅 SCHEDULE MORE INFO ▾
[EXPS-103] Program Funding Source Financial Detail	★ ⌚ RUN 📅 SCHEDULE MORE INFO ▾
[GNRL-105] Program Participation Summary	★ ⌚ RUN 📅 SCHEDULE MORE INFO ▾
[GNRL-106] Program Roster	★ ⌚ RUN 📅 SCHEDULE MORE INFO ▾
[GNRL-220] Program Details Report [2022]	★ ⌚ RUN 📅 SCHEDULE MORE INFO ▾

- 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.



REPORT LIBRARY

Program Based Reports > [GNRL-106] Program Roster

Program(s) Choose...

Status Choose...

HoHs Only? ☒ No ☐ Yes

Report Date Range 08/29/2023 – 08/29/2023

Report Output Format ☒ Web Page ☐ PDF - Program ☐ PDF - Program and Unit ☐ Excel

SUBMIT

- d. Review the report for 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

Tue Aug 29 04:34:26 PM 2023

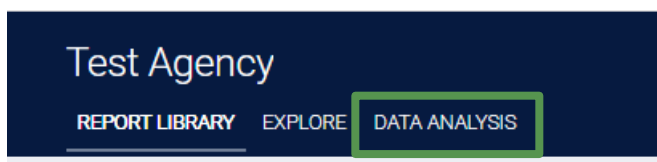
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CLARITY

HUMAN SERVICES

2. Inventory – Bed Assignments and Statuses

- From the primary navigation tool, select **Reports**. Select the **Data Analysis** tab. This page can often take a few additional seconds to load.
- Select **San Francisco ONE System Reports** to expand the menu. Under ***Inventory – Temporary Shelter**, select the **Temporary Shelter Bed Assignments and Statuses** report.



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

- 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	0	120	0
6	0	197	0
2	20	42	0
8	0	178	0

3. Inventory – Temporary Shelter Bed/Unit Roster

- a. From the primary navigation tool, select **Reports**. Select the **Data Analysis** tab.



- b. Select **San Francisco ONE System Reports** to expand the menu. Under ***Inventory – Temporary Shelter**, select the **Temporary Shelter Bed/Unit Roster** report.

Department of Homelessness and Supportive Housing

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***Inventory - Temporary Shelter**

Navigation Center Bed Assignments and Statuses	▶ RUN
Temporary Shelter Bed Assignments and Statuses	▶ RUN
Temporary Shelter Bed/Unit Roster	▶ RUN
Temporary Shelter Client Roster	▶ RUN
Temporary Shelter Open Bed/Unit Report	▶ RUN

- c. The **Shelter Bed/Unit Roster** report provides a summary and detailed roster of beds in a building by their status and availability. You can filter this report to only show beds of a certain availability type. For example, if you only want to view offline beds, select Offline under the **Current Availability** filter to limit the results. Be sure to refresh the report with



the blue arrow button if you update the filters. The roster view includes client names, ONE IDs, links to profile, and start dates for the results. Only the head of household will appear on this report as assigned to a bed.

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	- (xxx)	2023-08-17	
2	Bed 002	Adult- Single Bed	Available	ⓘ	ⓘ	ⓘ	ⓘ	ⓘ	
3	Bed 003	Adult- Single Bed	Occupied	ⓘ	Juan Marichal	00027	- (xxx)	2023-08-28	
4	Bed 004	Adult- Single Bed	Available	ⓘ	ⓘ	ⓘ	ⓘ	ⓘ	
5	Bed 005	Adult- Single Bed	Occupied	ⓘ	Barry Bonds	00025	- (xxx)	2023-07-18	

4. Inventory – Temporary Shelter Client Roster

- a. From the primary navigation tool, select **Reports**. Select the **Data Analysis** tab.



- b. Select **San Francisco ONE System Reports** to expand the menu. Under ***Inventory – Temporary Shelter**, select the **Temporary Shelter Client Roster** report.

Department of Homelessness and Supportive Housing

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Built In Reports 0 report(s) ▾

San Francisco ONE System Reports 70 report(s) ▲

***Inventory - Temporary Shelter**

Navigation Center Bed Assignments and Statuses	▶ RUN
Temporary Shelter Bed Assignments and Statuses	▶ RUN
Temporary Shelter Bed/Unit Roster	▶ RUN
Temporary Shelter Client Roster	▶ RUN
Temporary Shelter Open Bed/Unit Report	▶ RUN

- c. Select the shelter from the Program Name filter and hit the blue arrow button to refresh the report. The Temporary Shelter Client Roster lists all clients currently enrolled in a shelter program along with their bed assignments. If the **Unit Assignment** column is blank, it means the client is enrolled in shelter but not assigned to their bed. See section *Assign Client to a Bed* (page 6) to update any incorrect entries. All household members will appear on this report, but *only* the head of household will appear with a bed assignment.

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

