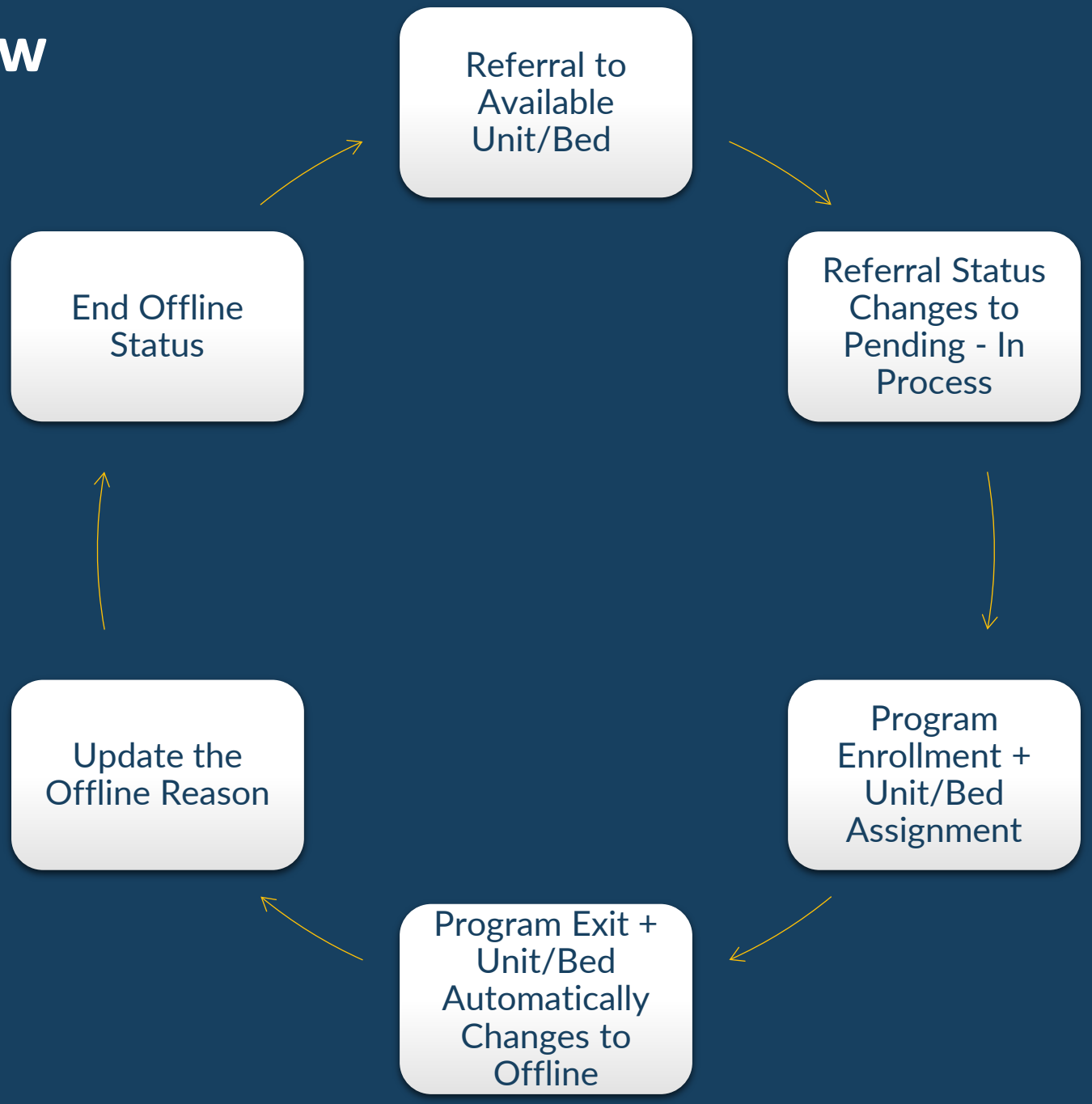
Family Temporary Shelter

ONE System Training

Updated September 2026

Bitfocus

Workflow



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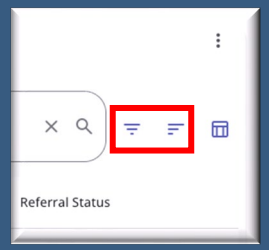
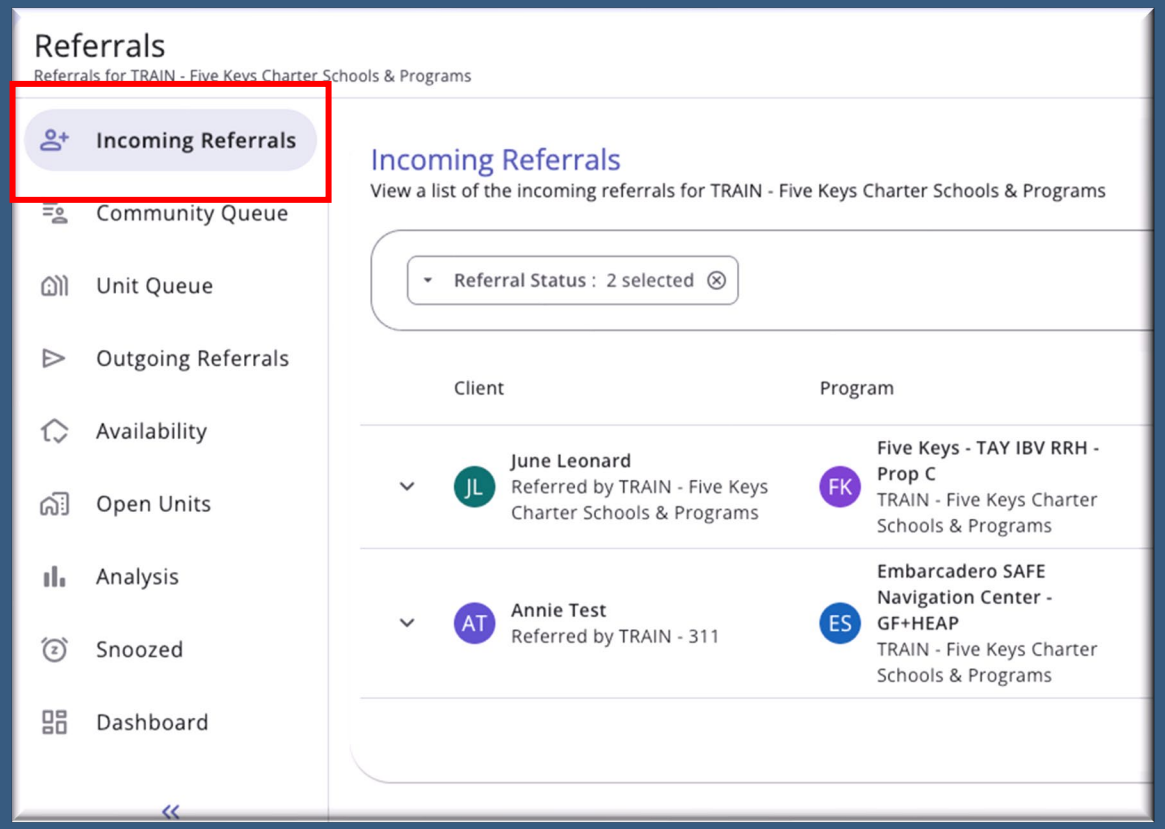
Referral from Access Point

- Monitor the Incoming Referrals tab for new families who are referred to your program
- The referral is **only made for the Head of Household** (HoH) they will be the only household member listed on the referral

Search filters allow you to refine your search





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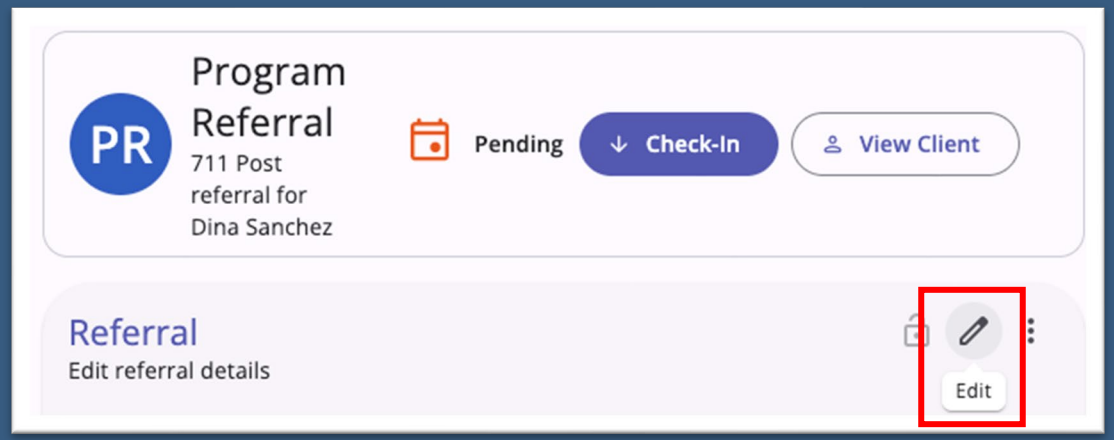
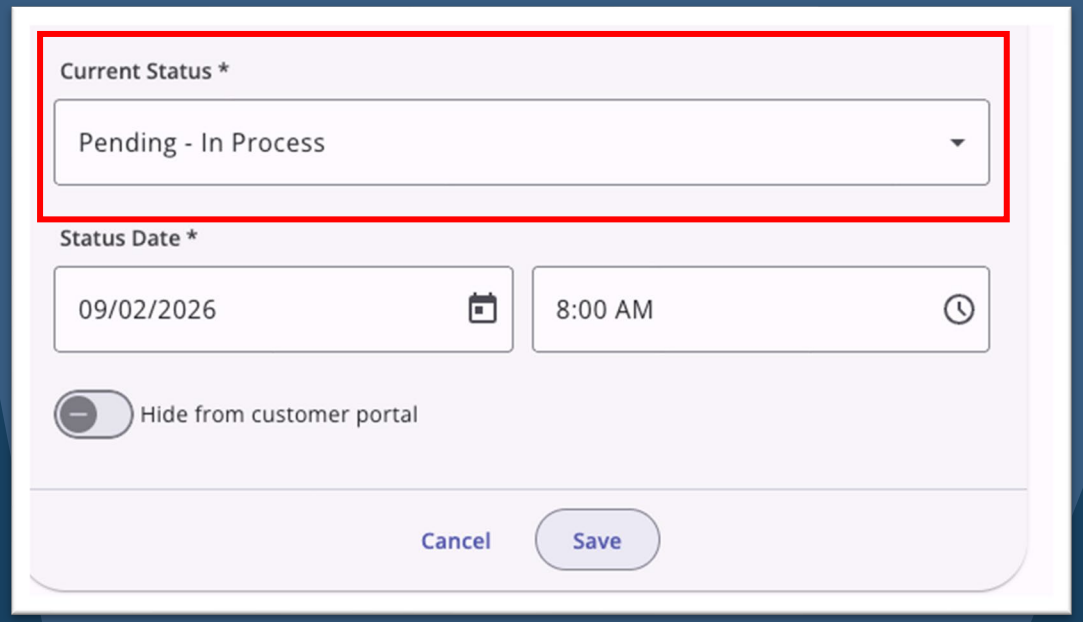
Pending - In Process

- Indicate that you have received the referral by changing the referral status to Pending – In Process
- Change the referral status by clicking on the pencil icon within the client's referral
- Then change the Current Status to Pending In-Process, update the Status Date and click SAVE





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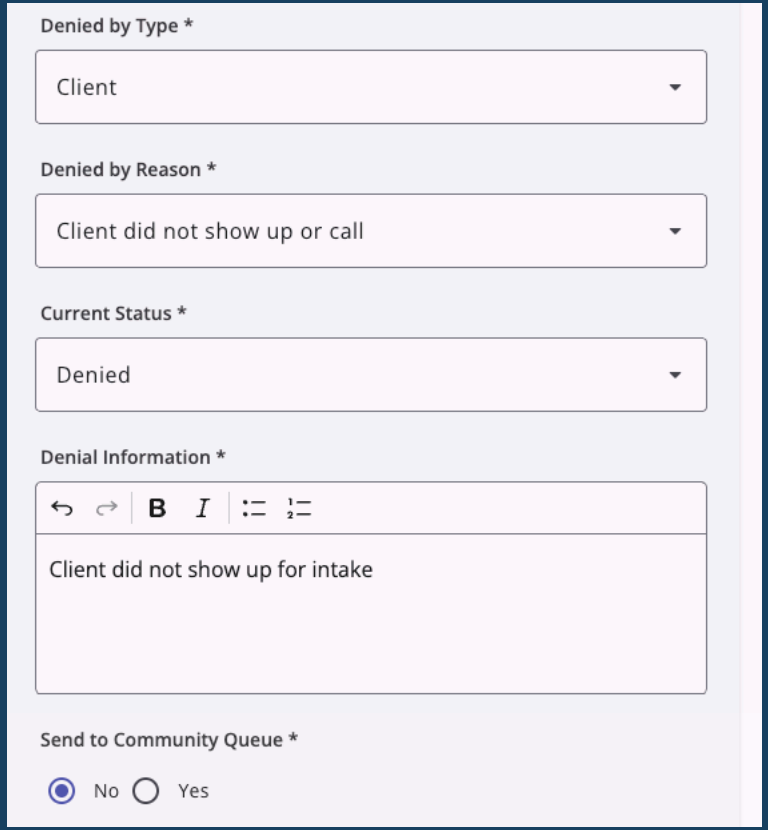
Denying Referrals

- 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

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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

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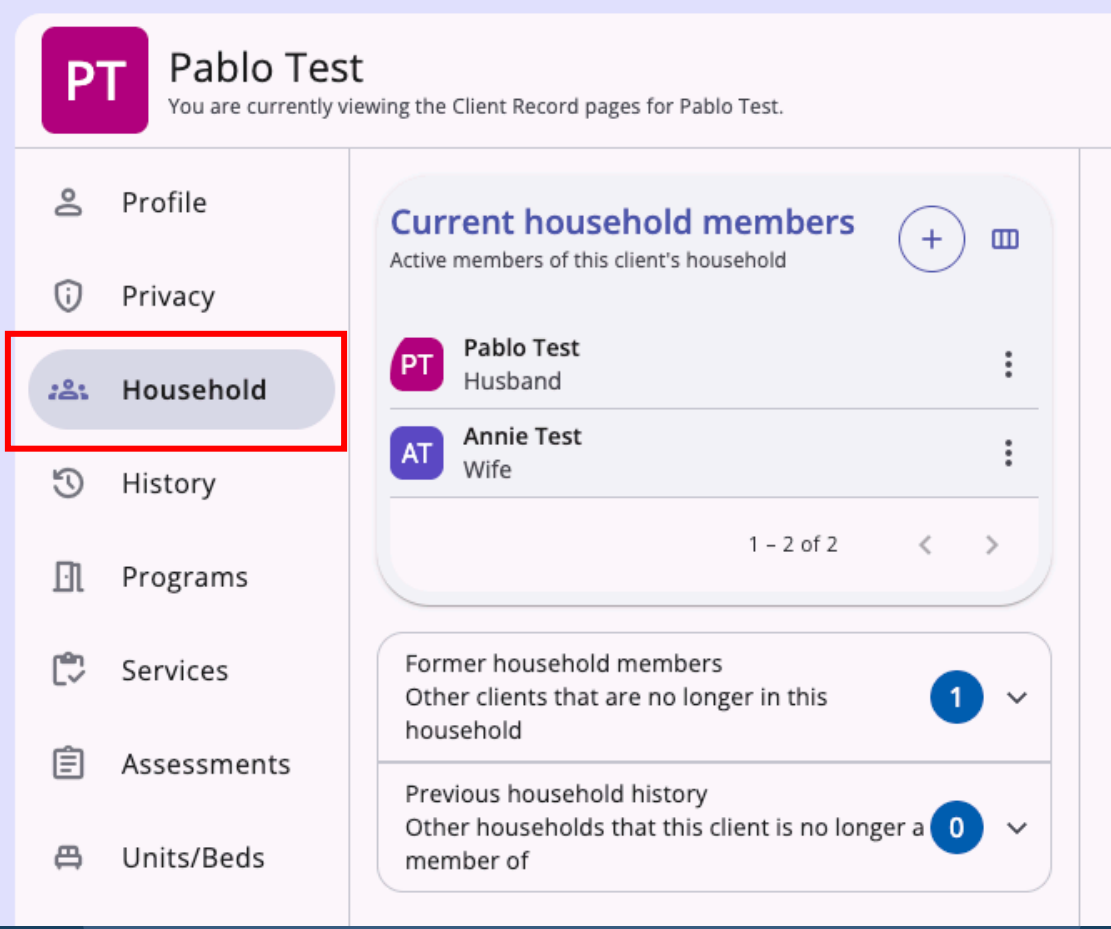
Household Composition

From the client's household page:

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



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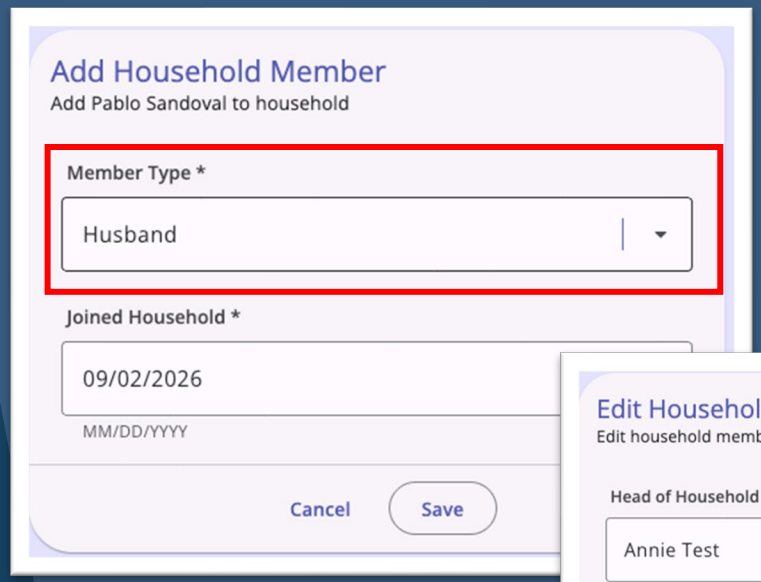
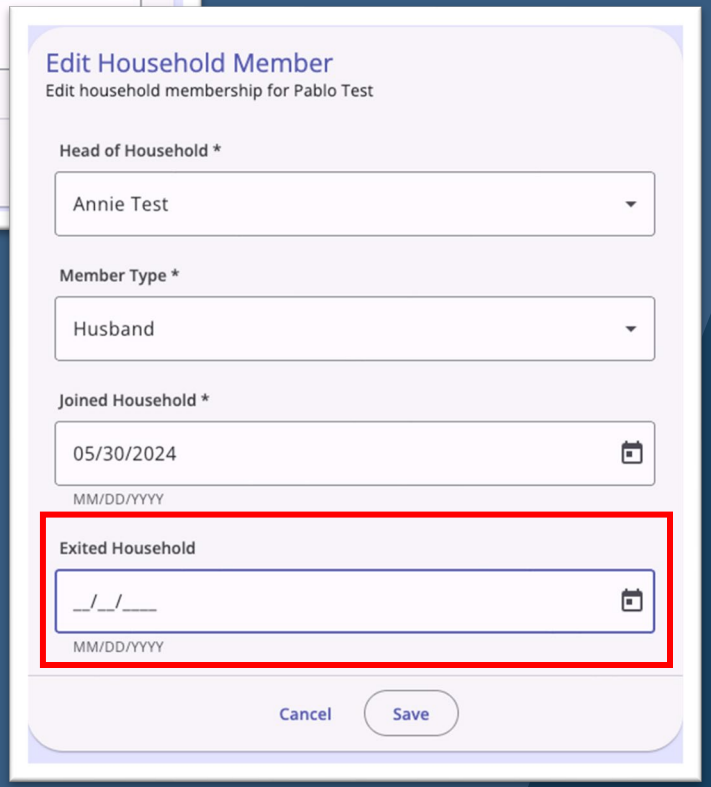
Add/Remove Household Members

From the client's household page:

- Click the + button to search for new or existing household members
- Search for a client by UI, name, SSN or DoB
- If adding, select the household member's relationship to the HoH and household join date
- If removing, select the household member's exit date.





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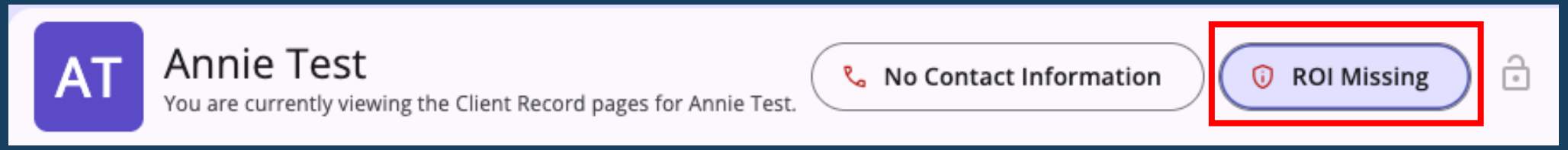
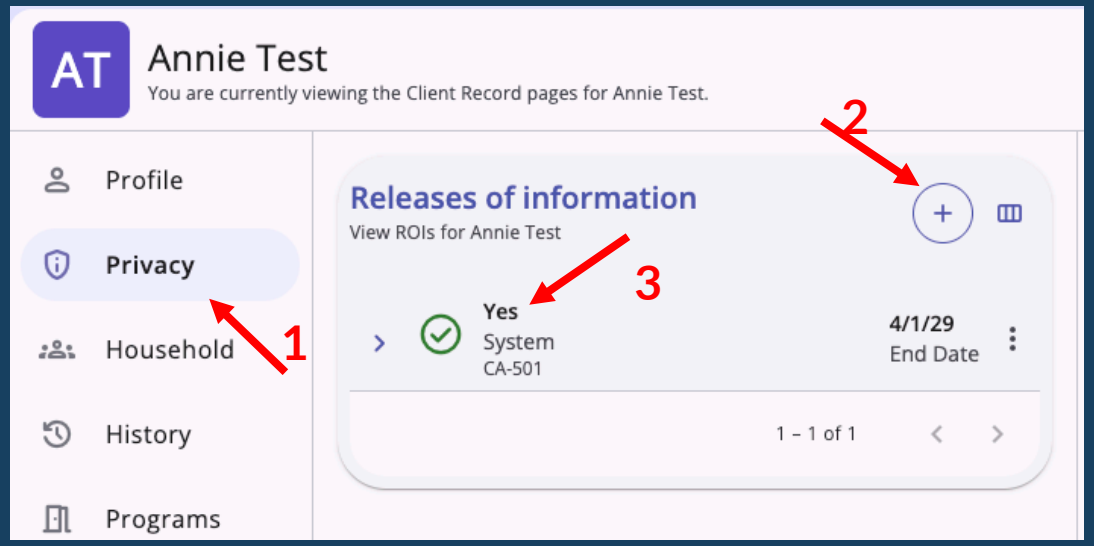
Accepting Referrals - Check and add ROI

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





Add a new ROI through the privacy tab on the client menu

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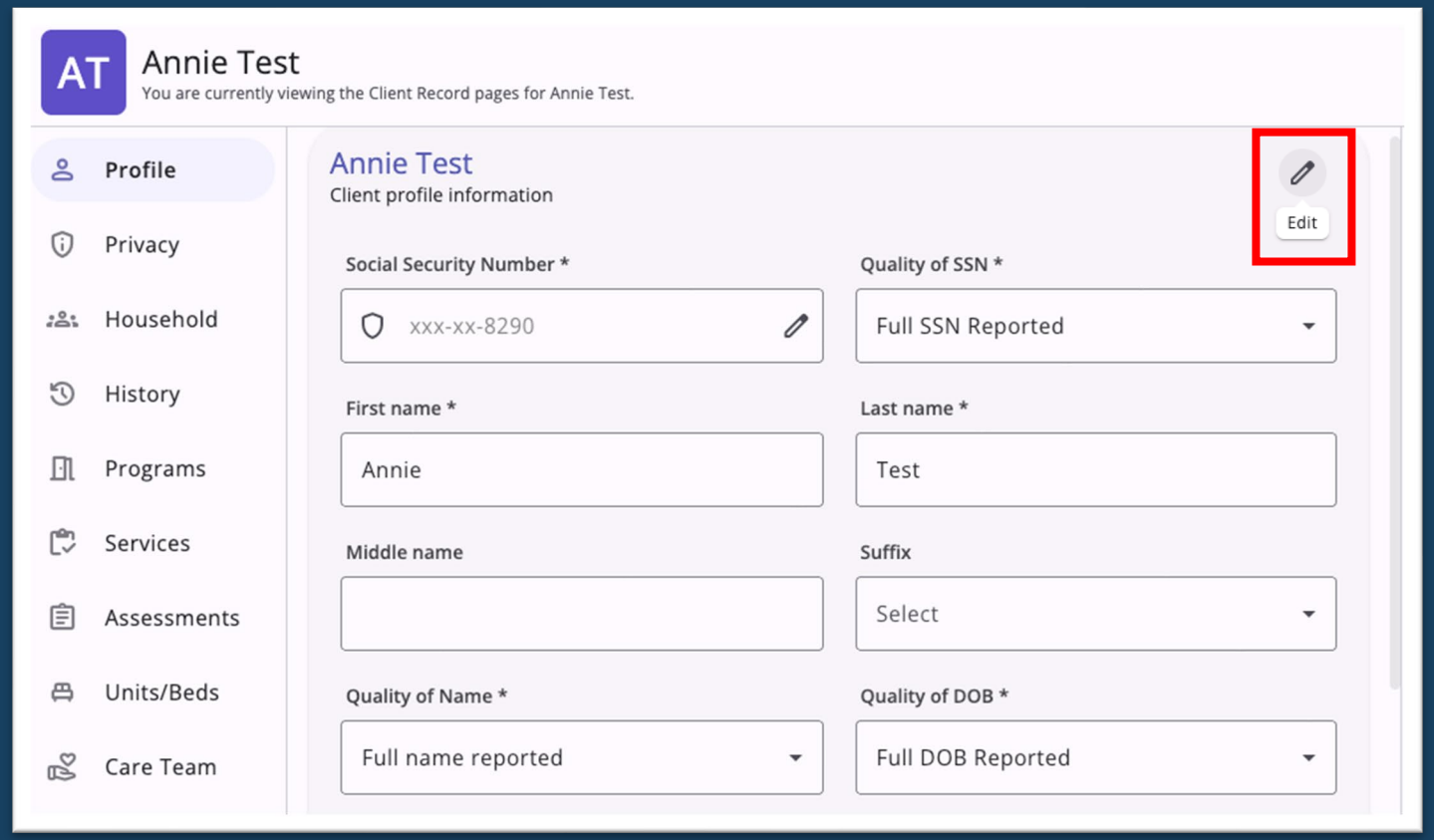
Accepting Referrals – Review and Update Client Profile

- Ensure client profile is up to date and complete



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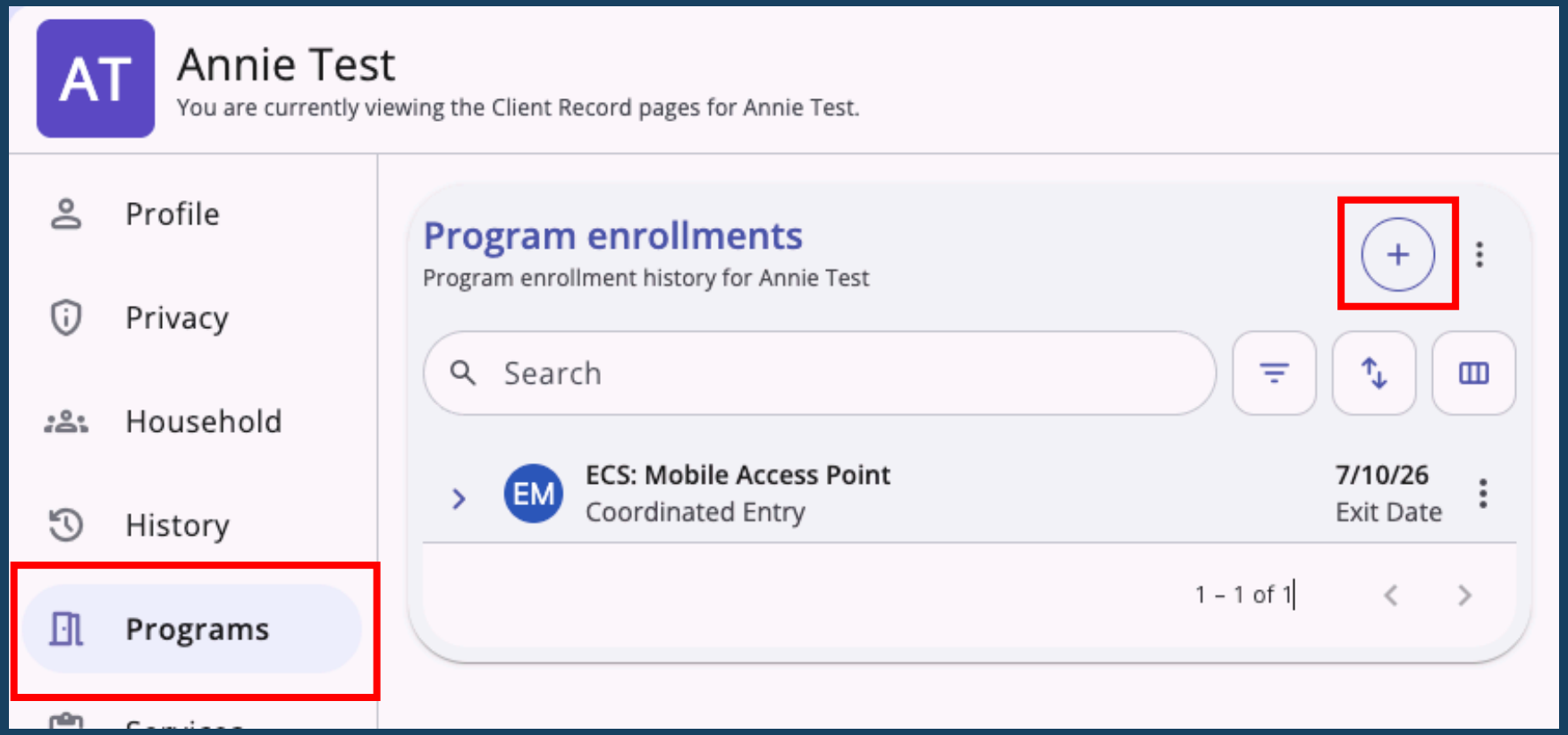
Accepting Referrals



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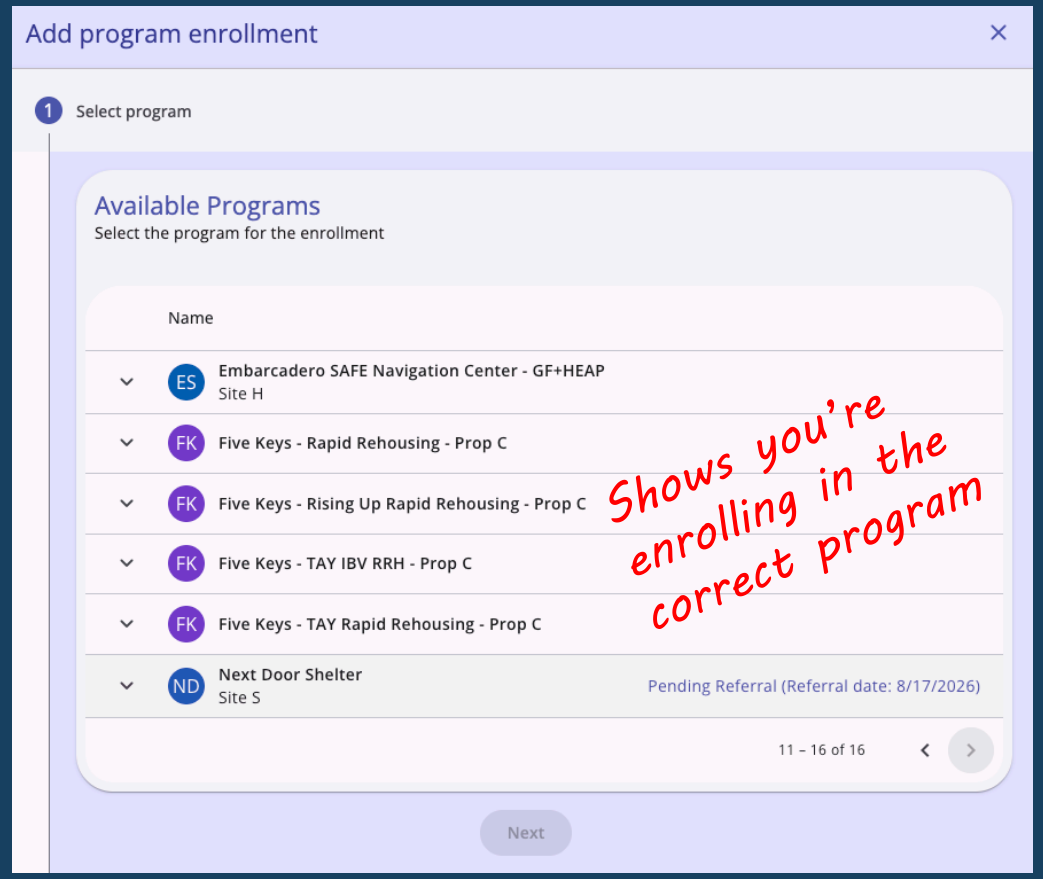
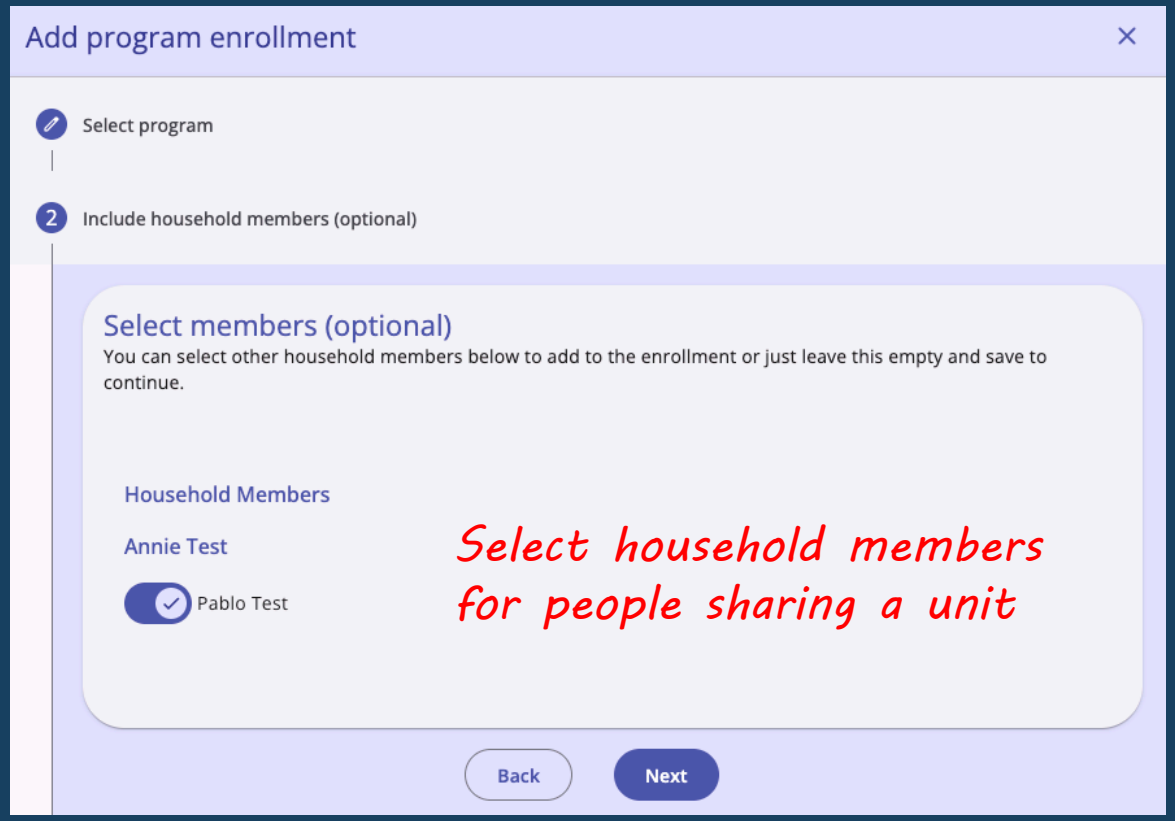
Accepting Referrals





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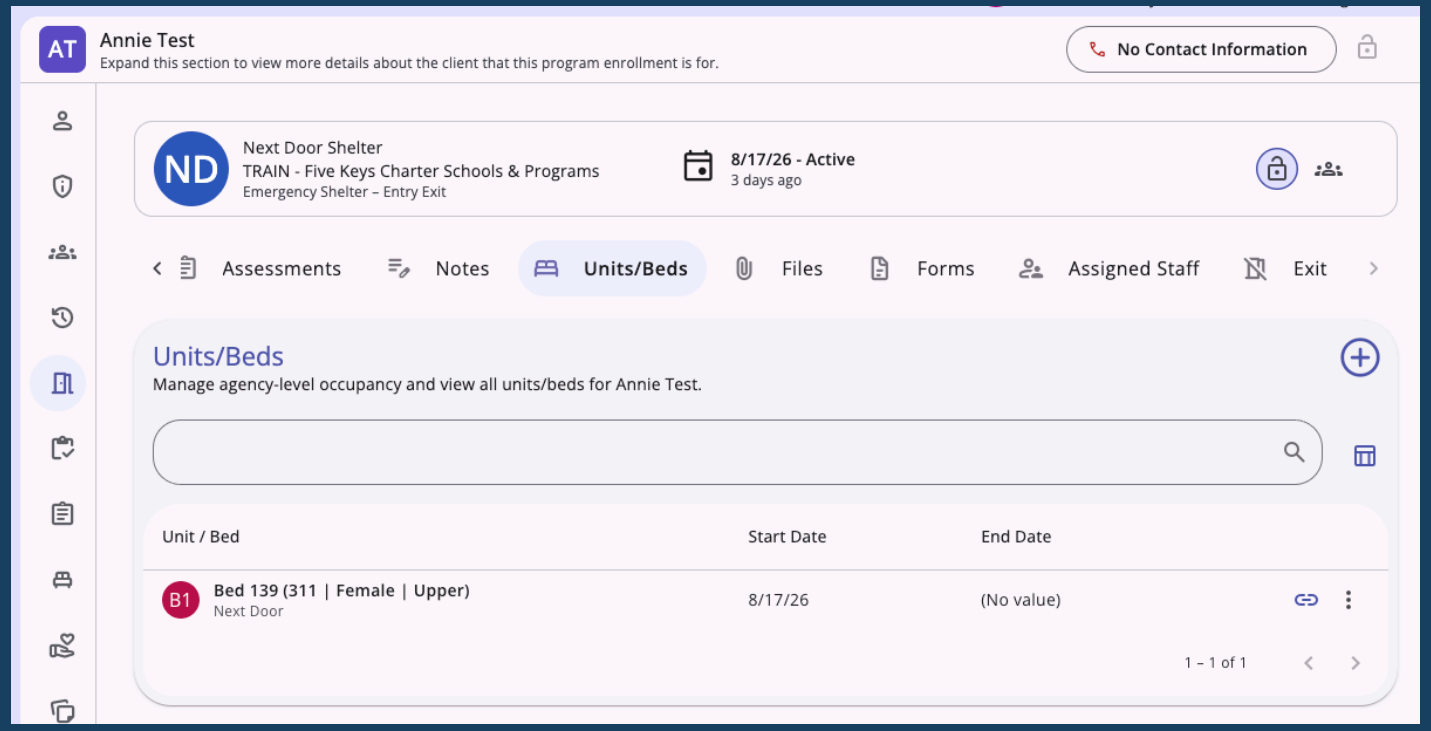
Unit/Bed Assignment

- Unit/Bed will already be assigned
- Unit/Bed assignment **only shows in the HoH record**



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Changing Beds/Units

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Changing Beds/Units

Staff can move family to a different unit/bed

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

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

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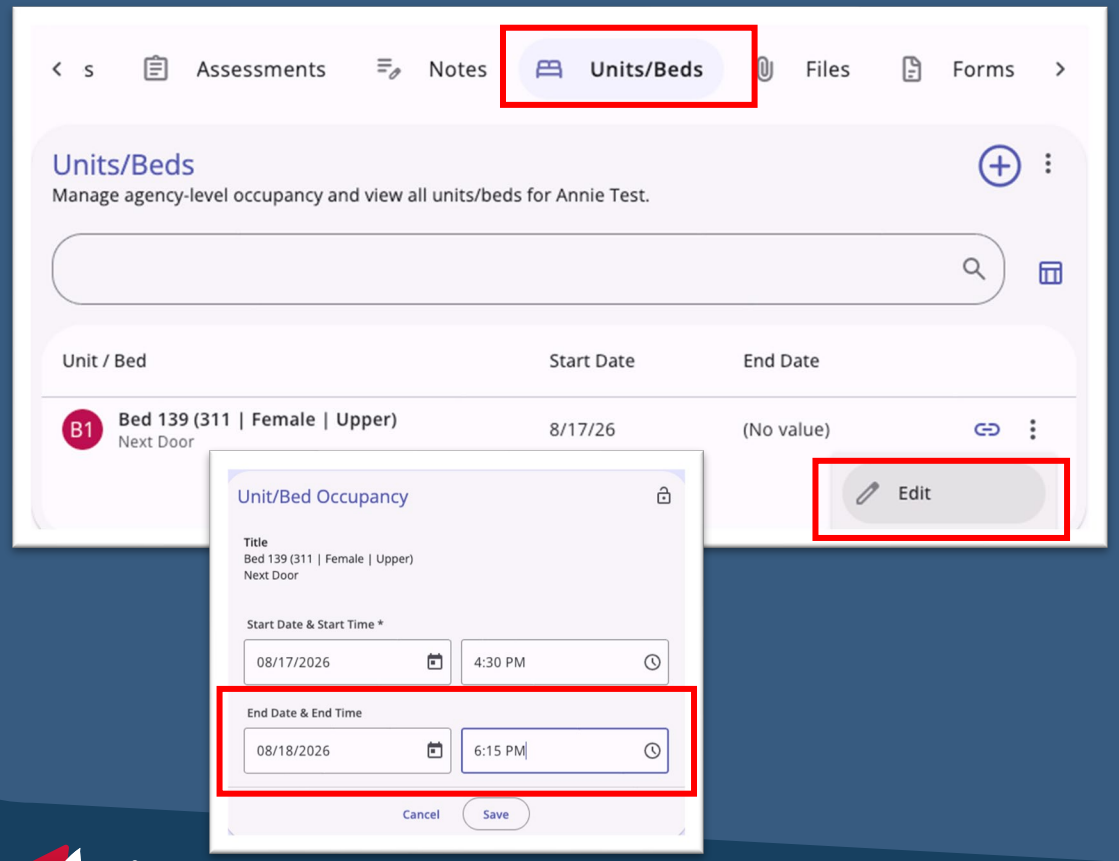
Changing Beds/Units

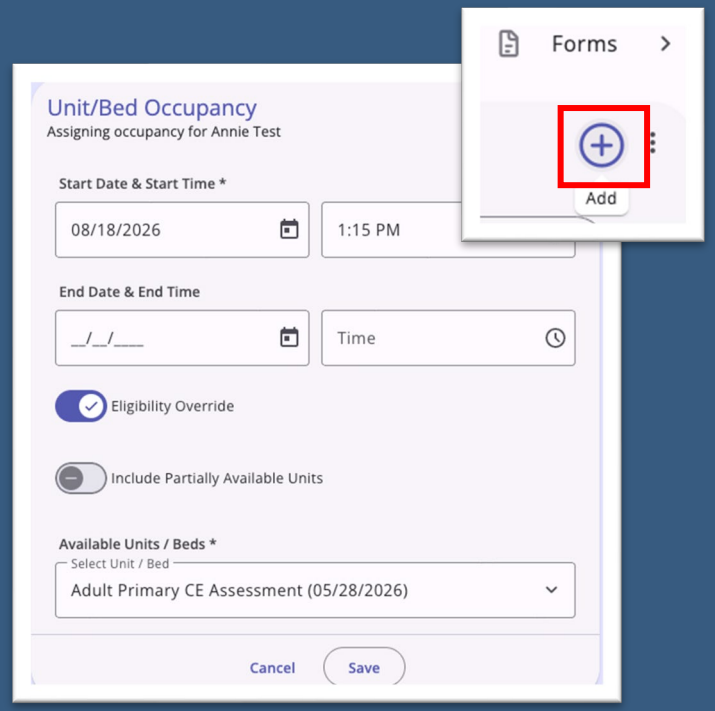
End Current Bed/Unit Stay

- Add an end date to the current bed/unit



Assign to a New Bed/Unit

- Assign the HoH to a new bed/unit
  - Start date should not overlap with end date of old bed/unit



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Exits

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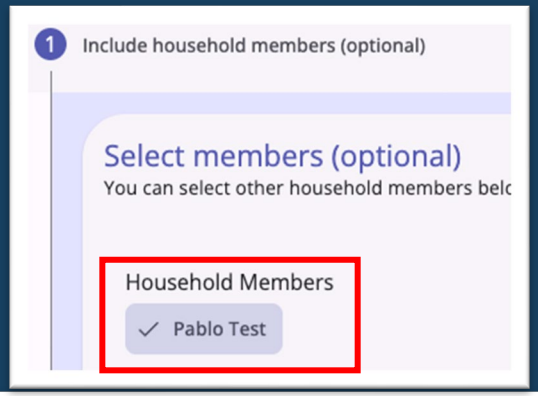
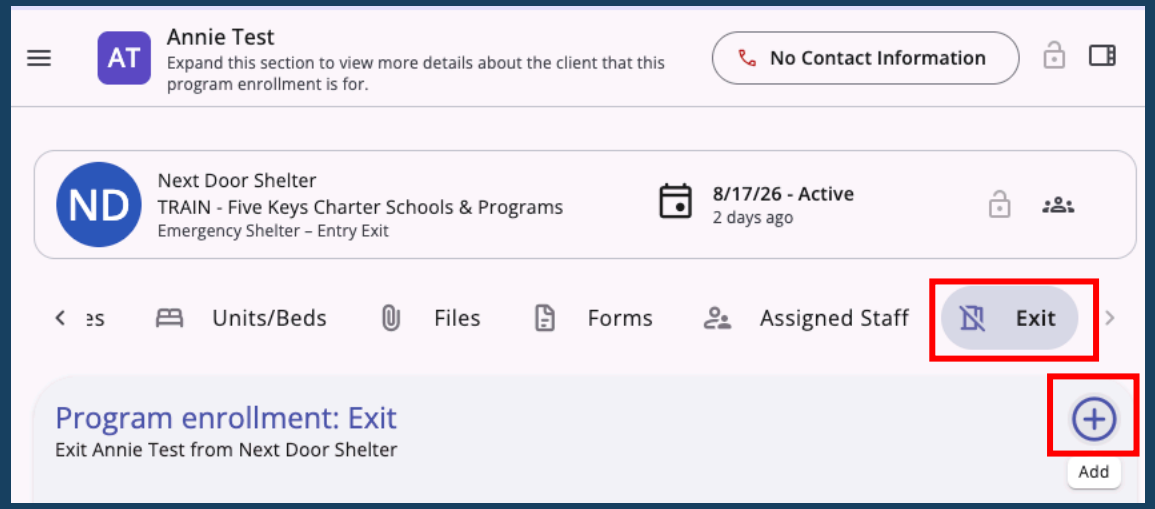
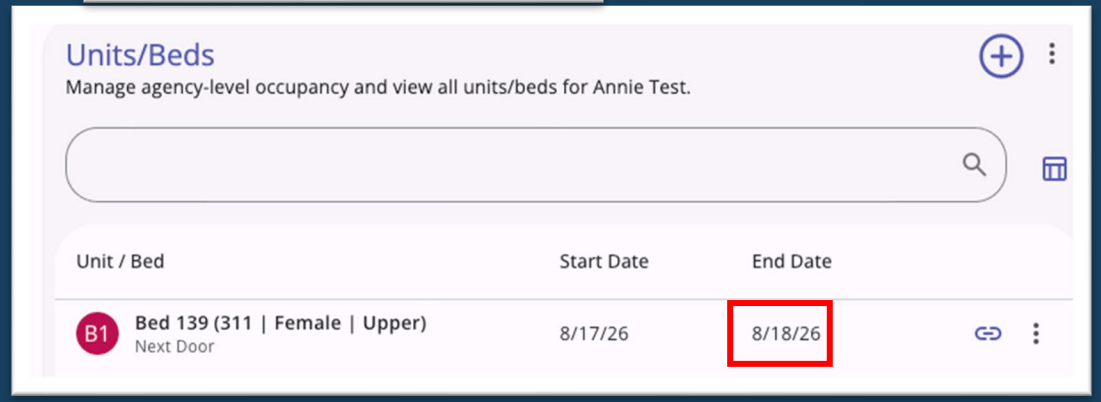
Exiting Client from Unit/Bed

- Exits should occur when a family is no longer staying at the shelter
- Exiting from a program will automatically exit HoH from the unit/bed
  - Complete an exit for all household members



Make sure to include all relevant family members when exiting household





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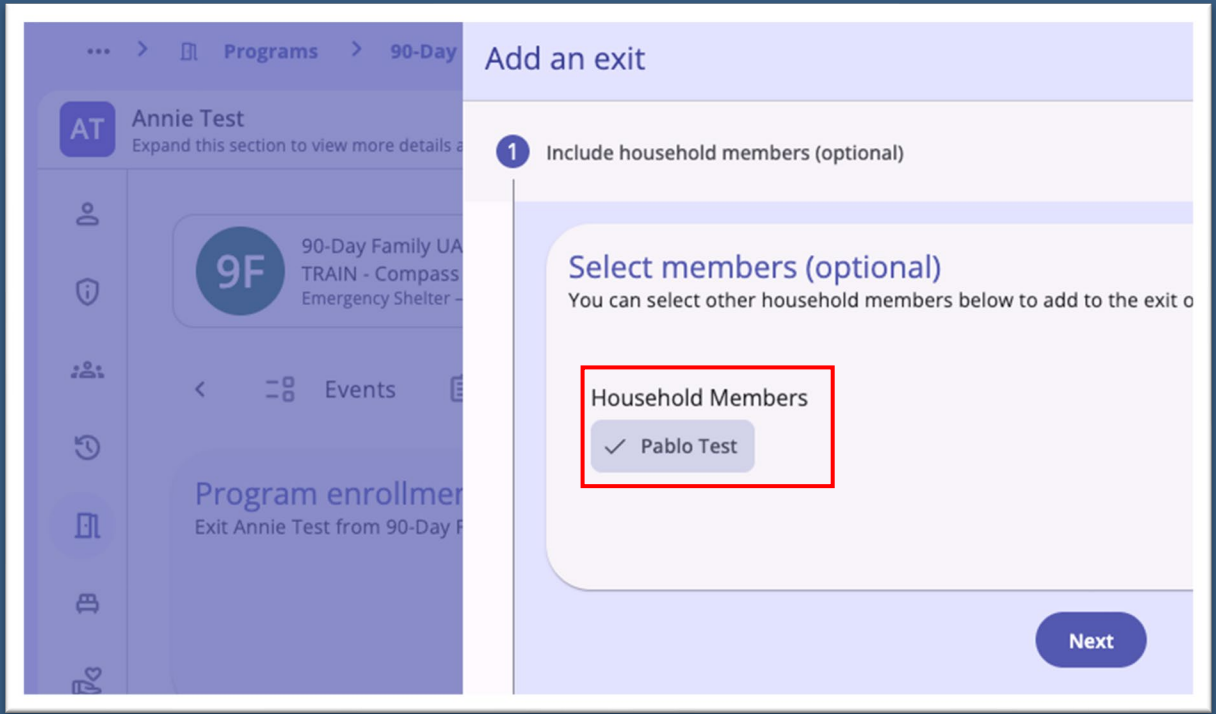
Household Exits Reminder

⇢ Be sure to include (toggle on) relevant Household Members when exiting household from program*



*If exiting the Head of Household only, be sure that a new HoH is designated, and that the remaining members have their relationship to the new HoH updated. If program is using Inventory, the unit should be assigned to the new HoH as the first step.

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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

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Unit/Bed Status

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Unit/Bed 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	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). *Call or email help desk to set to inactive or if accidentally made inactive.*

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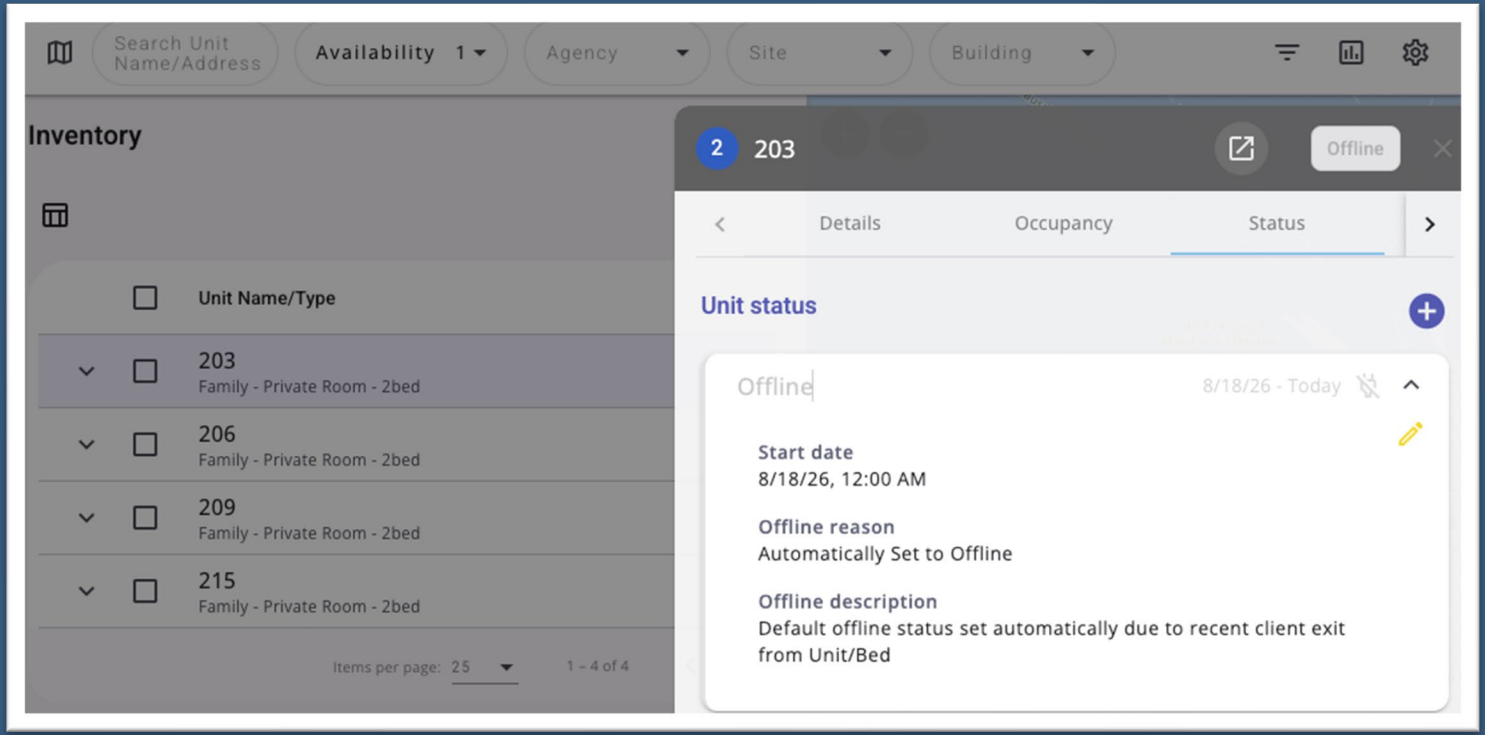
Automatic Offline Functionality

- The system will automatically switch the unit/bed to offline when a family is exited from the program.



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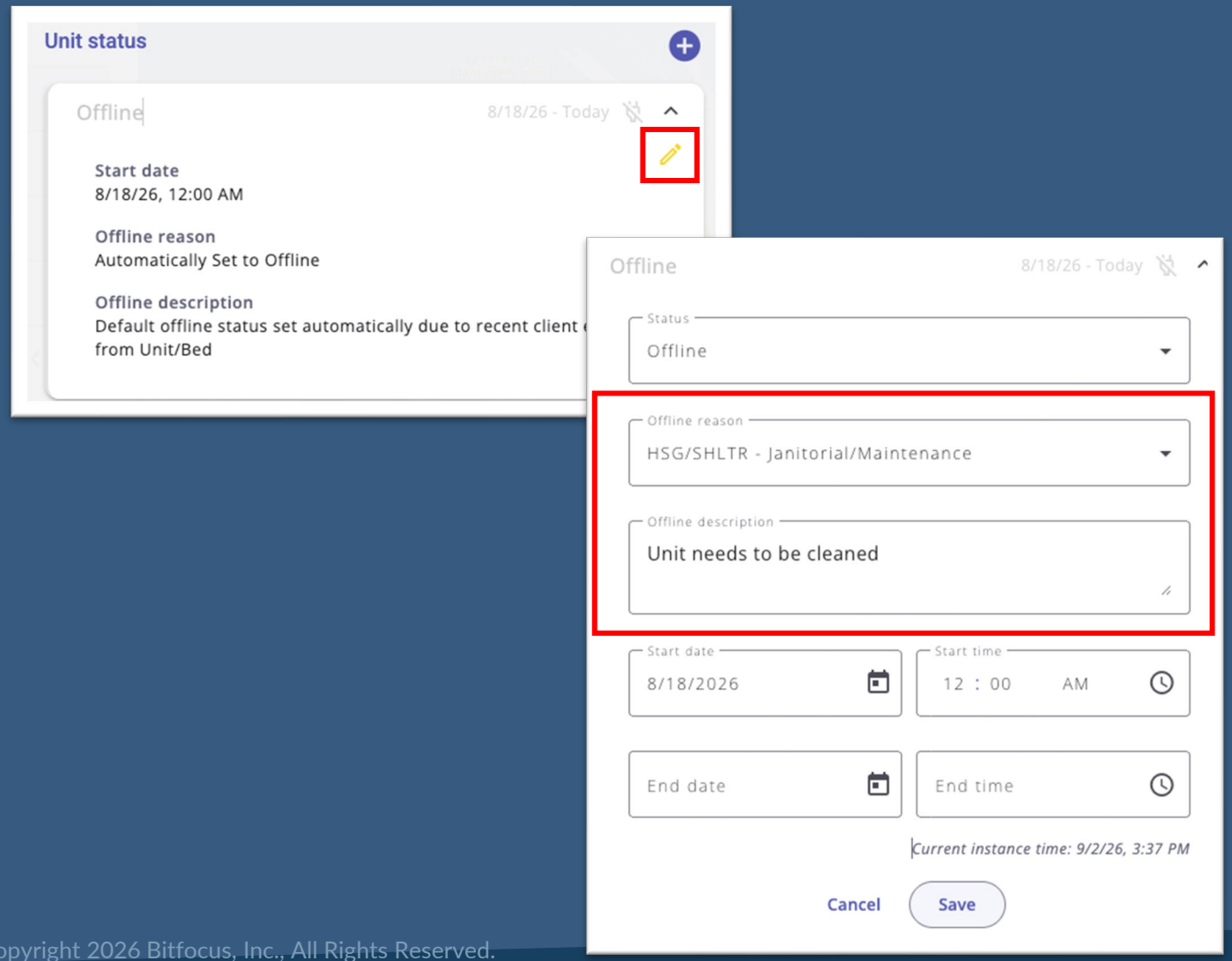
Updating Offline Reason and Description

- Open the *Display Card* for the unit
- Edit by clicking pencil icon
- Update Offline Reason and Description



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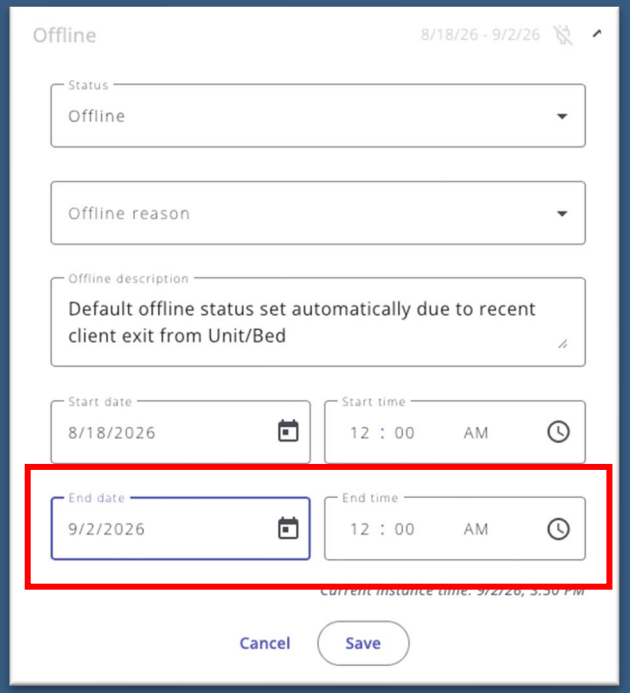
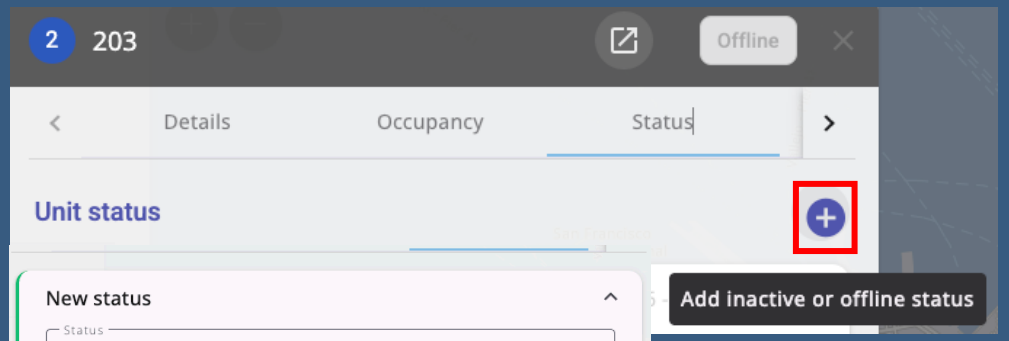
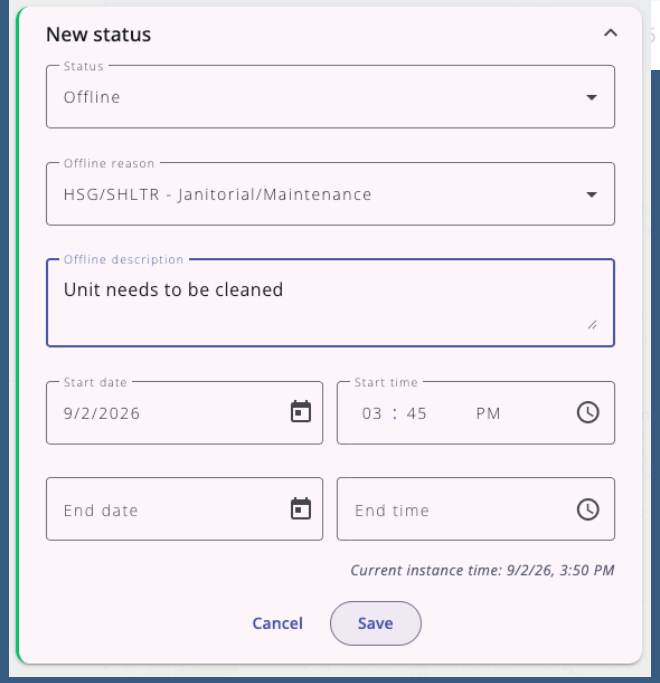
Ending or Creating Offline Status

Ending

- Click on the pencil icon
- Enter End Date







Creating

- Click on the purple (+) sign
- Select a new status
- Leave End Date blank

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Services to Track Family Shelter Lengths of Stay & Extensions

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Family Shelter Expected Exit Date

Service Name	Service Items	Agencies
Family Shelter Expected Exit Date (only create once and update as extensions are approved)	• Enter the expected exit date in the Event Date field (when extensions are granted, find original service in the client History tab and update Event Date to the new expected exit date and document the dates of each new extension in text box). • **Client level service:** not completed within program enrollment	• Catholic Charities CYO • Compass Family Services • Hamilton Families • Homeless Prenatal Program • Mission Action • Providence Foundation • Raphael House • Salvation Army

If a family transfers to a new shelter and is granted an extension, the new shelter should find the existing *Expected End Date* service in the client's history tab and update its event date to the new exit date.

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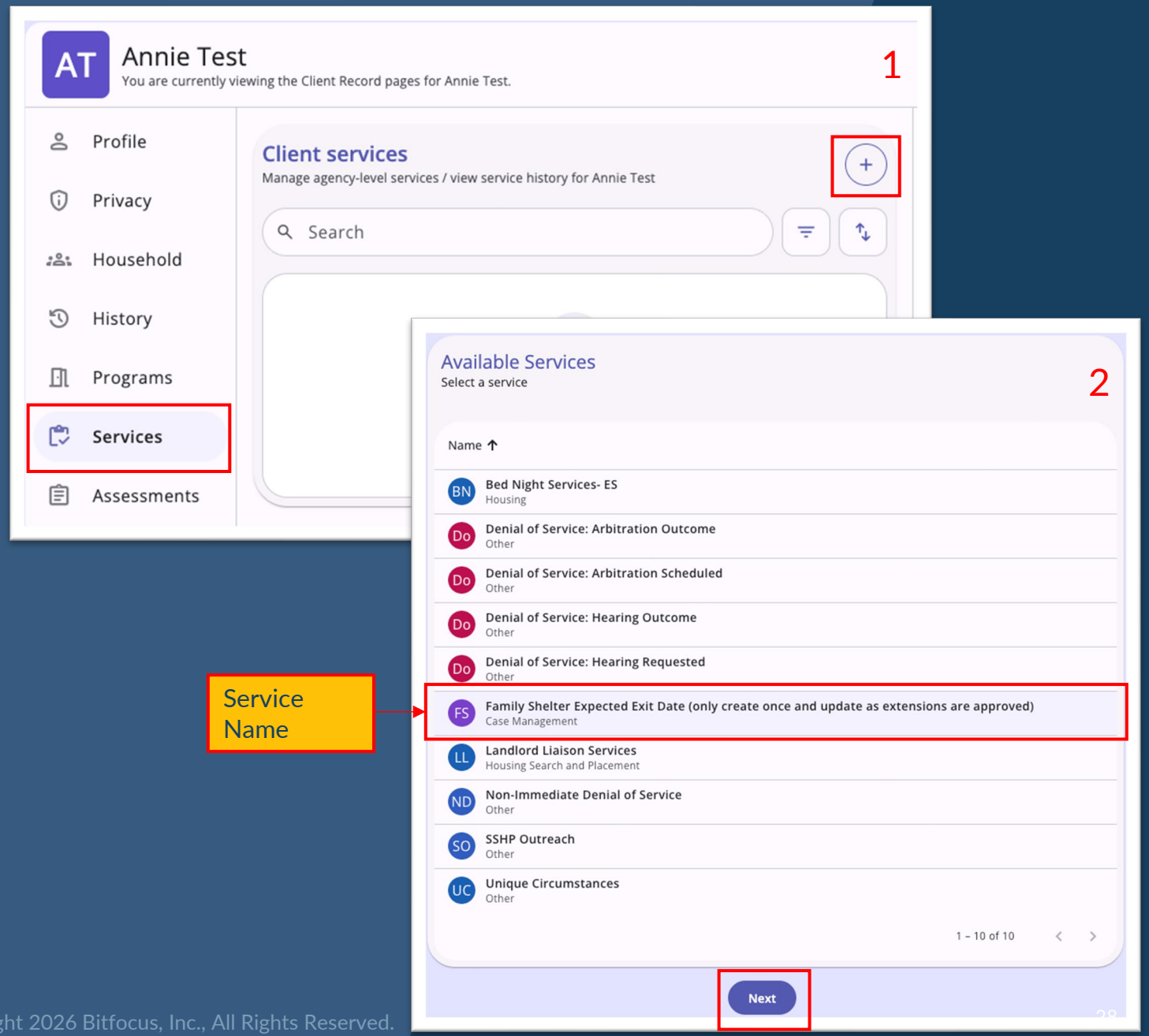
How to Submit a Client Level Service

From the client's profile page

1. Click on the Services Tab
2. Click on the (+) icon
3. Click on Service Name from the available services list



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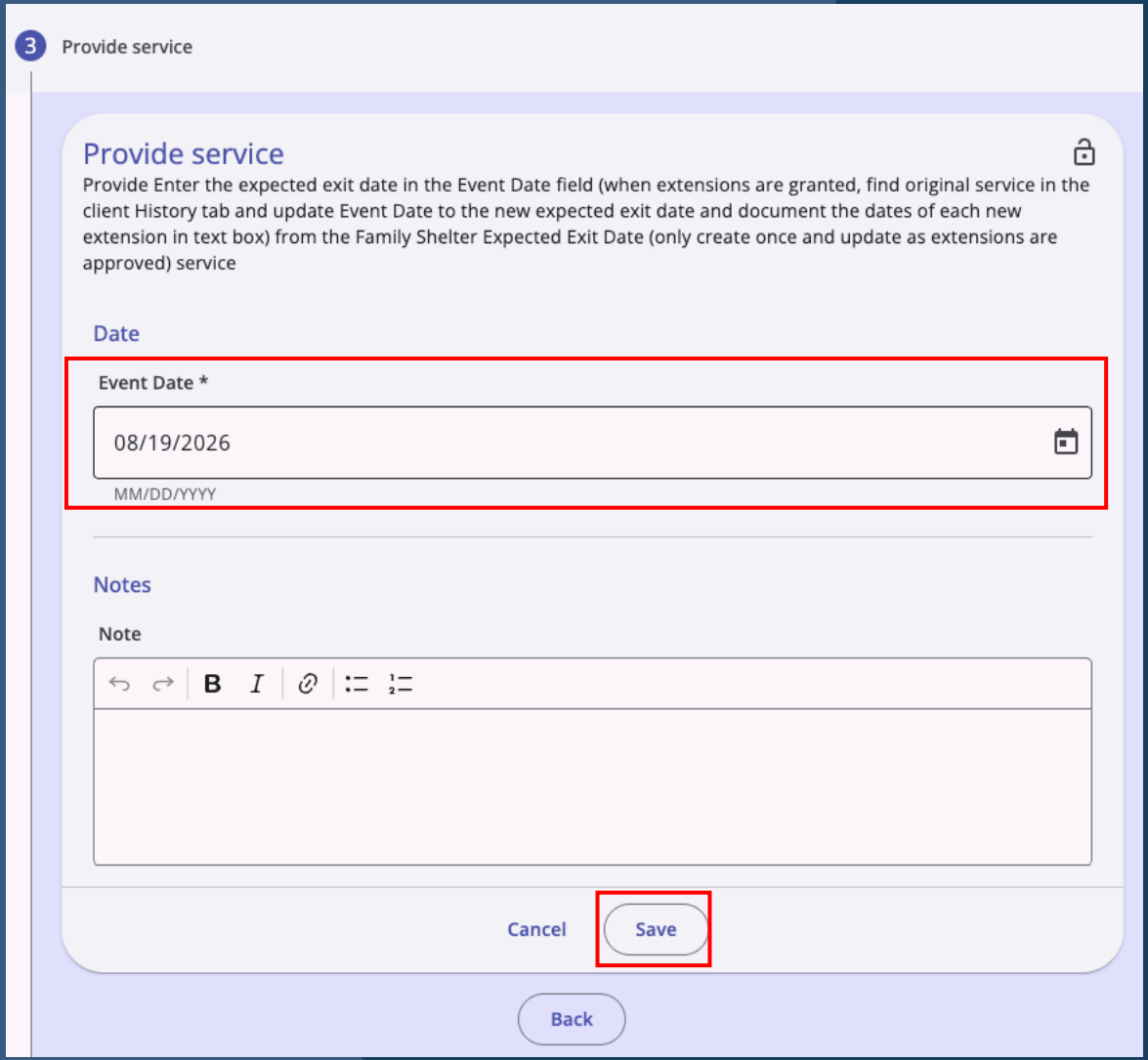
How to Submit a Client Level Service

From the client's profile page

4. Select the service item
5. Adjust the event date to the expect exit date
6. Click Save
7. Find Submitted Service in the History tab



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90-day Shelter Extension Services

Service Name	Service Items	Programs
Shelter Length of Stay 90-Day Extensions	1. Family Extension Review Meeting 2. Family Shelter Extension Response Letter Issued, Approved and Uploaded to ONE (Medical) 3. Family Shelter Extension Response Letter Issued, Approved and Uploaded to ONE (Transitional Housing Placement Pending) 4. Family Shelter Extension Response Letter Issued, Approved and Uploaded to ONE (Housing Pending) 5. Family Shelter Extension Response Letter Issued, Approved and Uploaded to ONE (Housing Barriers) 6. Family Shelter Extension Response Letter Issued, Denied and Uploaded to ONE (Provide full justification in text box.)	• Catholic Charities: St. Josephs Family Center • Compass Family Services: Compass Family Shelter • Compass Family Services: 90-Day Family UAV - GF • Hamilton Families: Hamilton Family Residence • Hamilton Families: Hamilton Family Emergency Center (HFEC) • Homeless Prenatal Program: HPP PATH Emergency Housing • Mission Action: Buena Vista Horace Mann Family Shelter (Stay Over) • Providence Foundation: Providence Oasis Family Shelter • Raphael House Residential Shelter Program • Salvation Army: Harbor House

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30-day Shelter Extension Services

Service Name	Service Items	Programs
Shelter Length of Stay 30-Day Extensions	1. Family Extension Review Meeting 2. Family Shelter Extension Response Letter Issued, Approved and Uploaded to ONE (Medical) 3. Family Shelter Extension Response Letter Issued, Approved and Uploaded to ONE (Temporary Shelter or Transitional Housing Placement Pending) 4. Family Shelter Extension Response Letter Issued, Approved and Uploaded to ONE (Housing Pending) 5. Family Shelter Extension Response Letter Issued, Denied and Uploaded to ONE (Provide full justification in text box.)	• Compass Family Services: 14-Day Family UAV - GF

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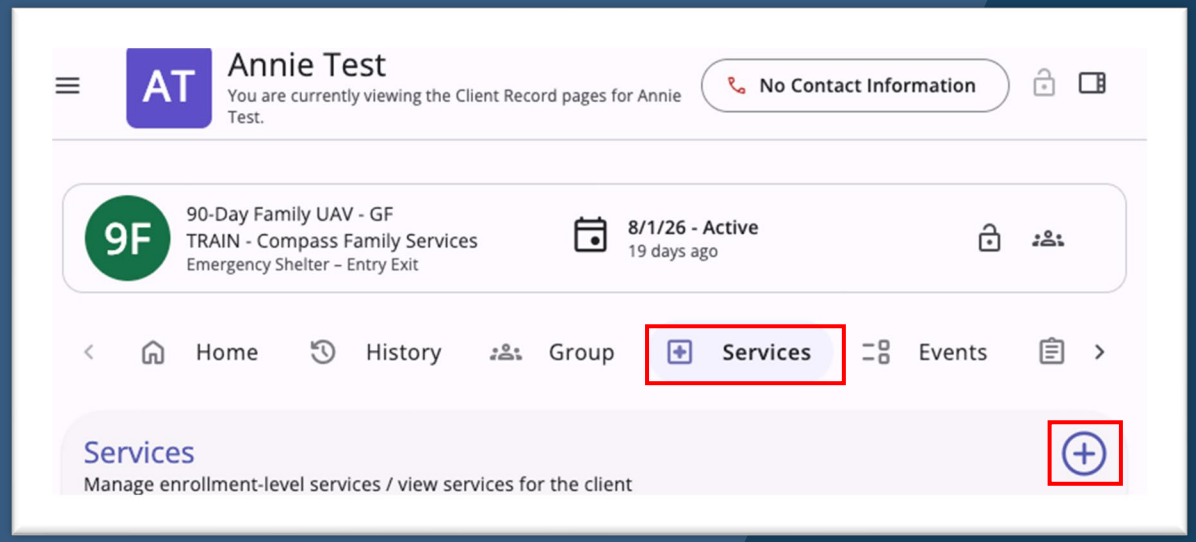
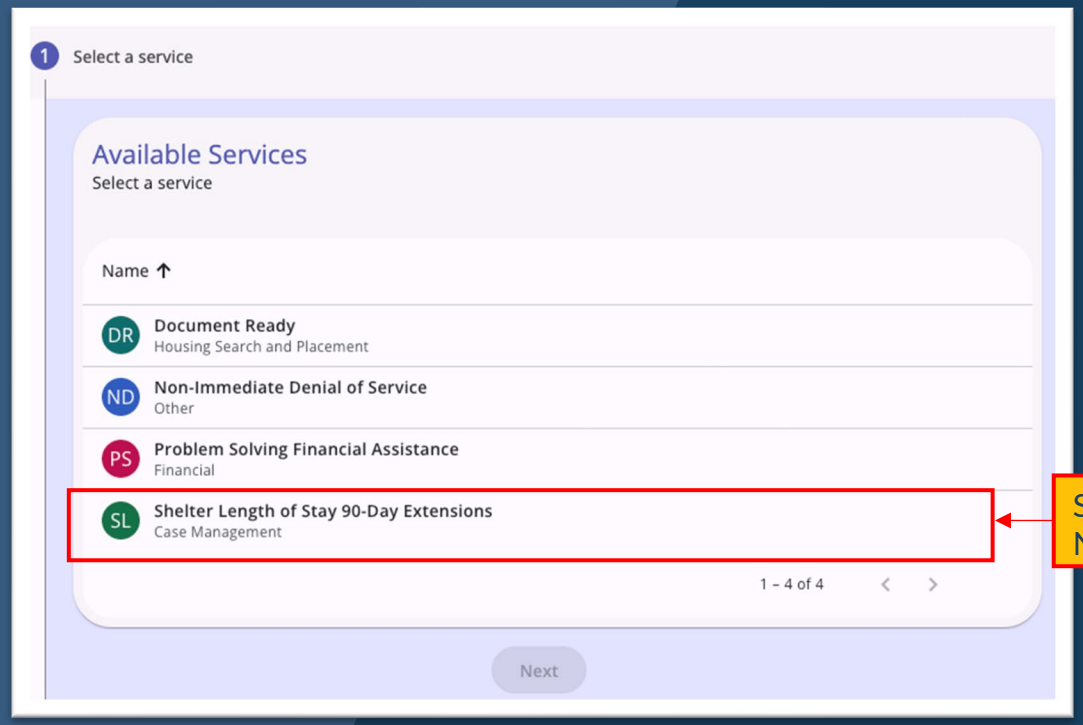
How to Submit a Service

While within a program enrollment

1. Click on Provide Services Tab
2. Click on the (+) icon
3. Click on Service Name





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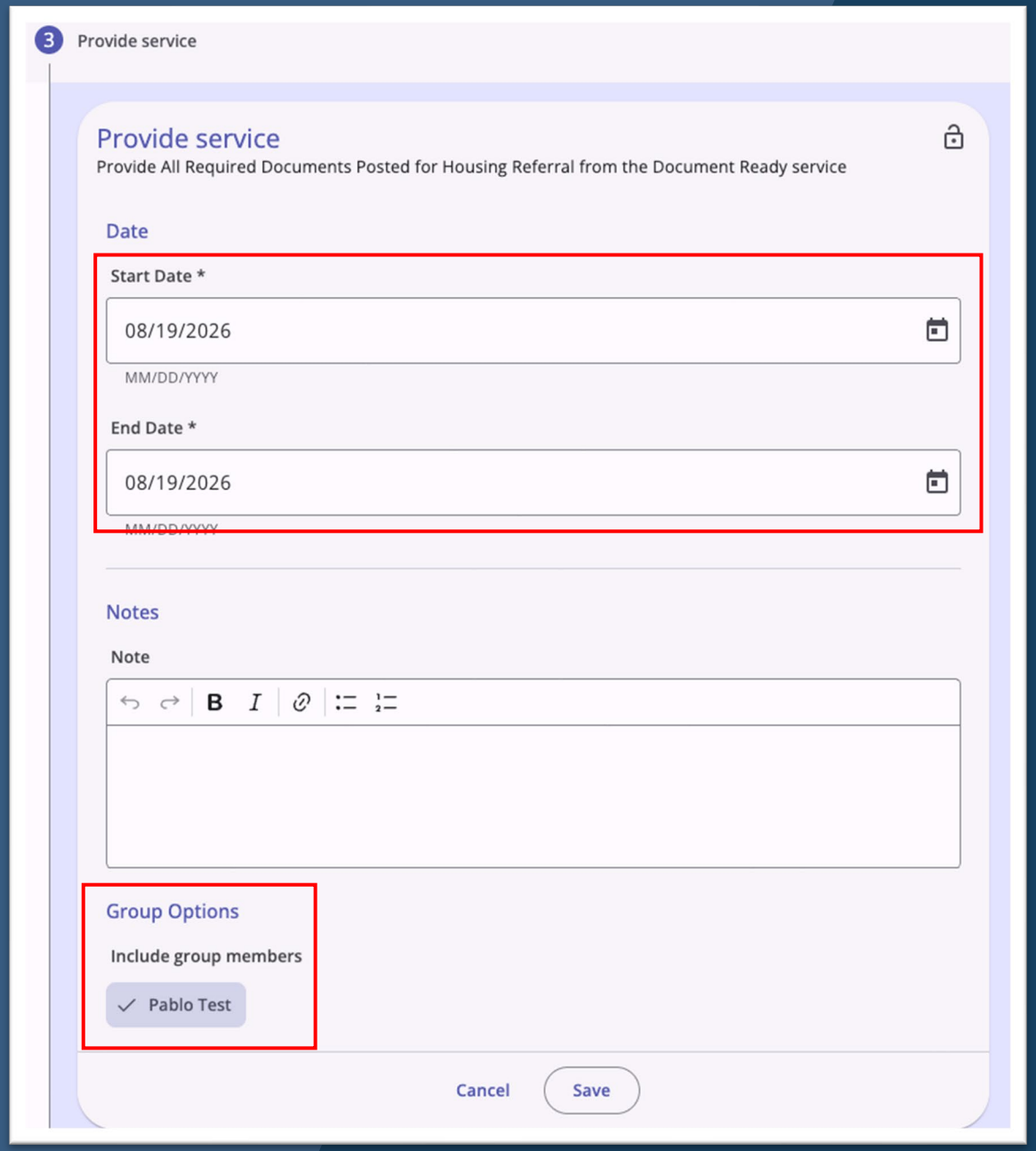
How to Submit a Service

While within a program enrollment

4. Click on the appropriate Service item
5. Adjust for appropriate date and write note
6. Include group members (if appropriate)
7. Click Save
8. Find Submitted Service in the History tab within program enrollment



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Family Shelter Extensions
File Uploads

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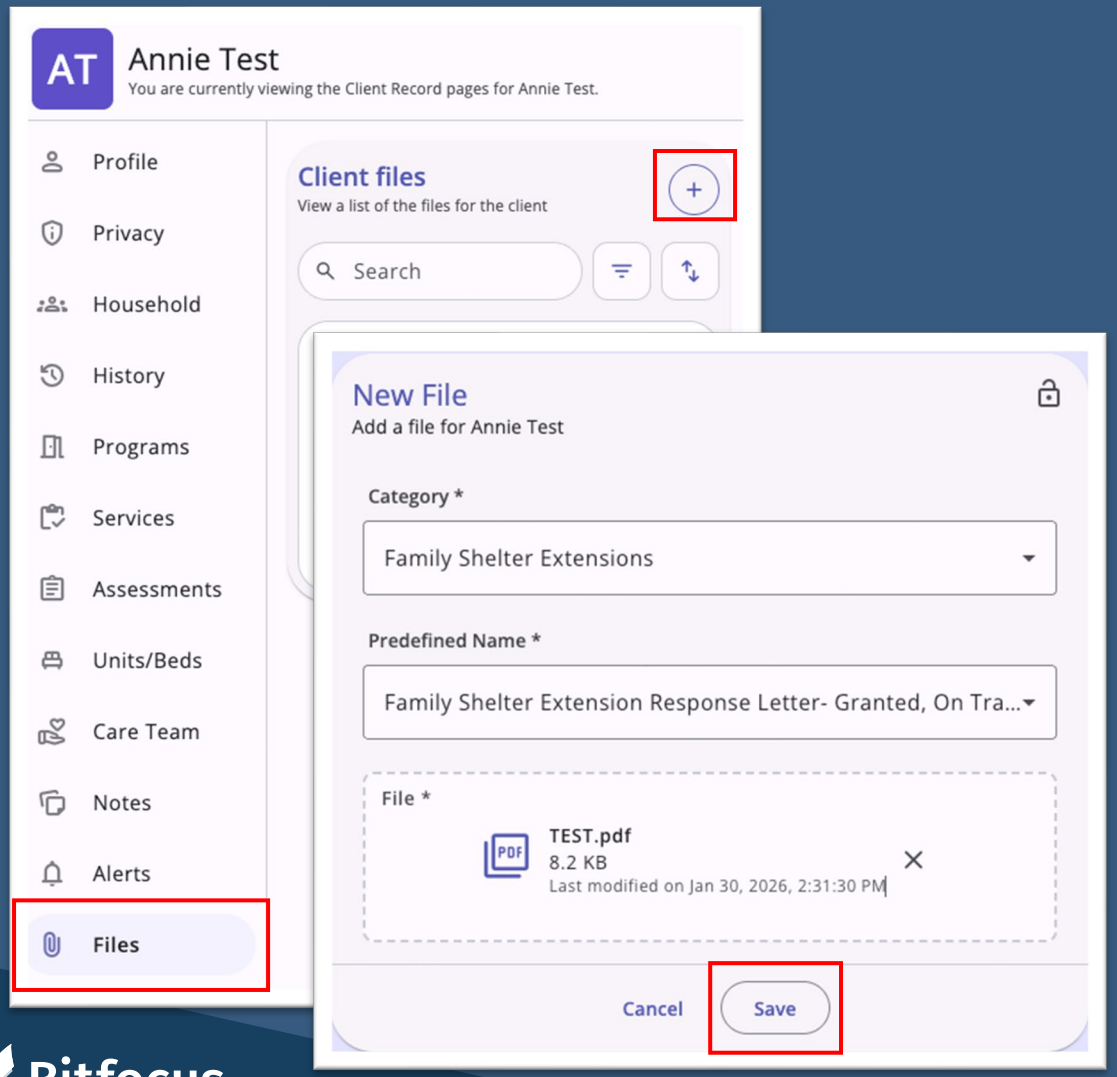
Family Shelter Extensions File Uploads



How to Add a New File

1. Select the file tab from the client's profile
2. Click on the (+) button to add a new file
3. Select the *Family Shelter Extensions* file category and the *Predefined Name* that matches the file you are uploading
4. Click *Select File* to select the file you want to upload
5. Click Add Record to complete the upload

You can now view your file in the Client's file tab, it will also include the upload date/time and identify the uploader.

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Shelter Length of Stay Exit Reason

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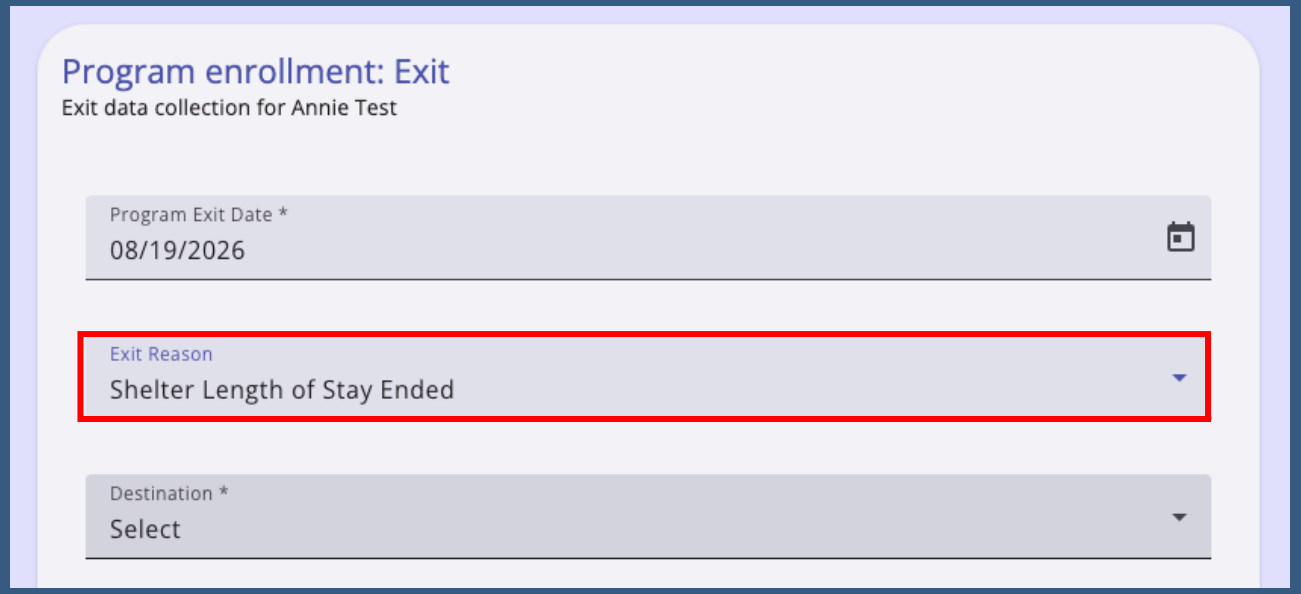
Shelter Length of Stay Exit Reason

- Client enrollments that end due to a length of stay end will use the exit reason: **"Shelter Length of Stay Ended"**



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Determining Continuous Length of Stay through the History Tab

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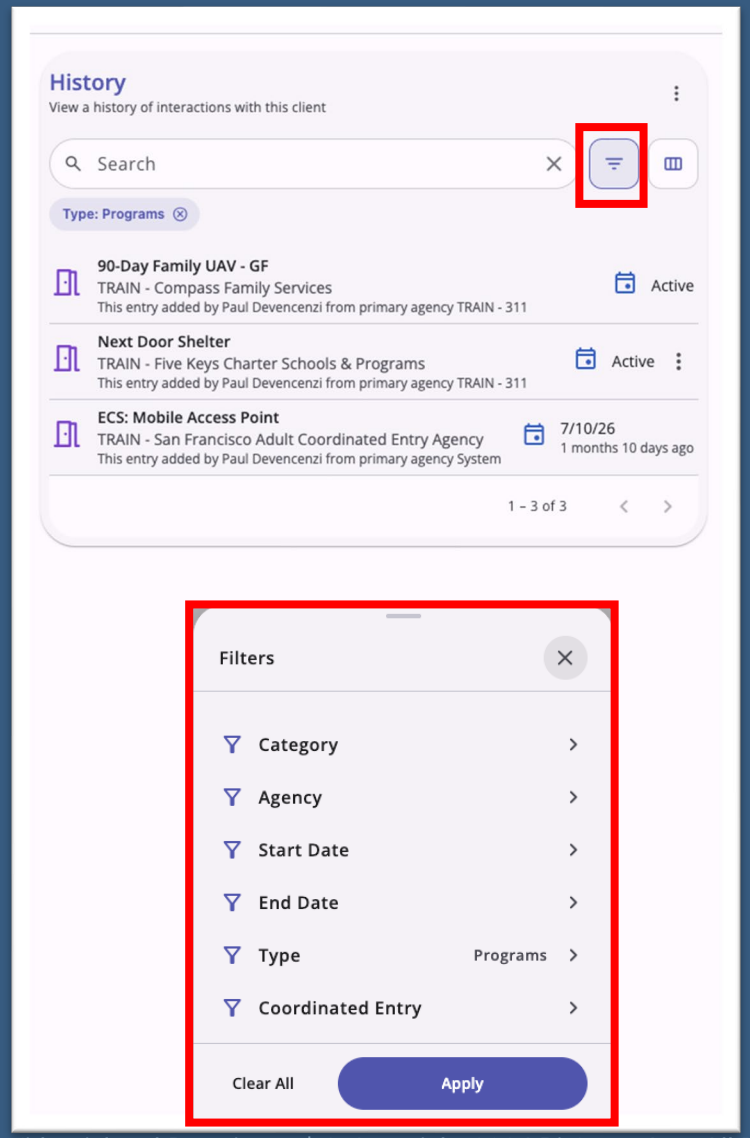
Determining Length of Stay



- You will sometimes need to determine a client's continuous length of stay if they transferred from another shelter program
  - This will also help determine the expected exit date
- Use the History Tab to track the HoH's length of time spent in Family Housing Shelter programs.
  1. Go to the History Tab
  2. Click on the *filter* icon next to the History search bar
  3. Select the Type filter, and filter on *Programs*, then click apply
  4. The history will now only show program enrollments

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Helpful Reports

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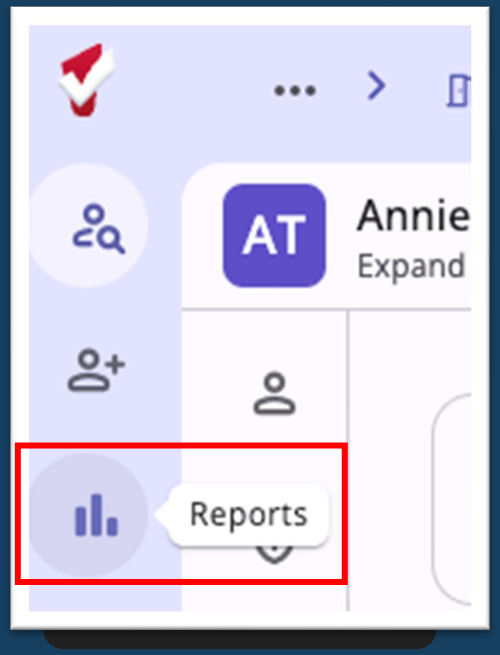
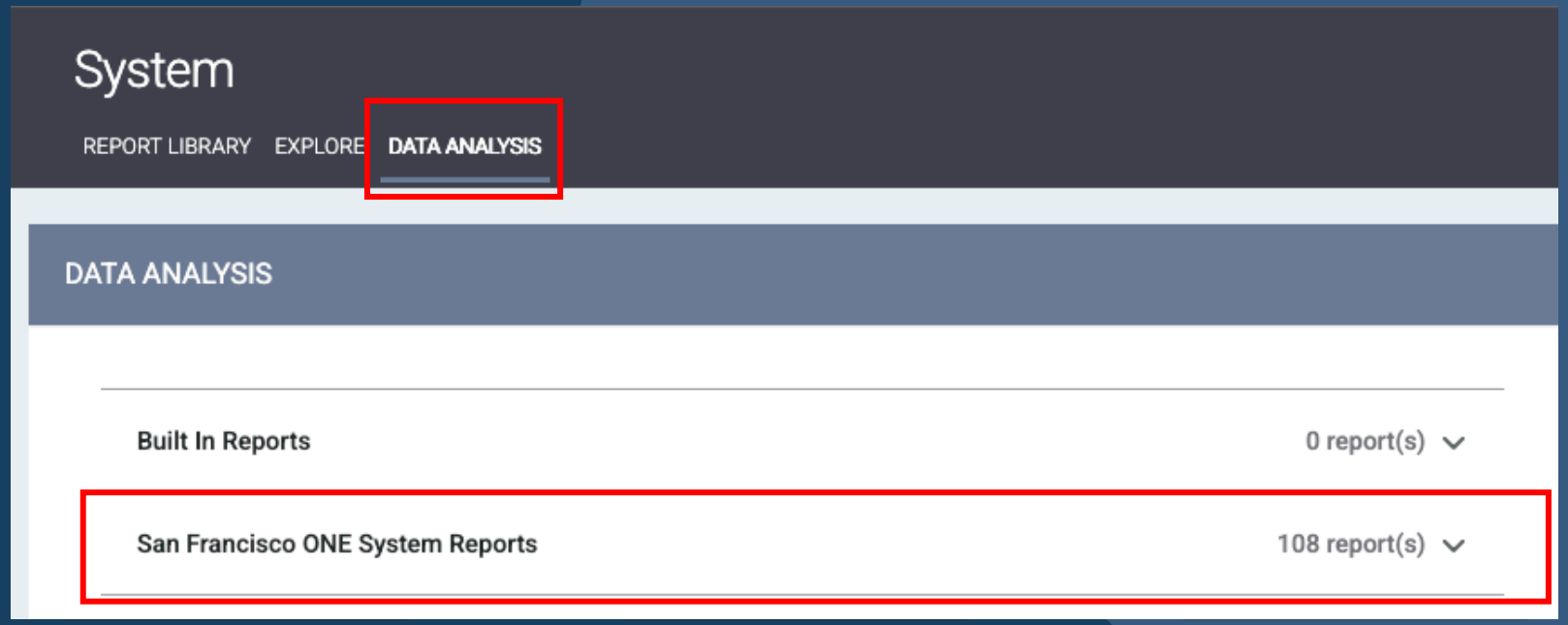
Inventory Reports

- Located under the *Data Analysis Tab*





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Shelter and Transitional Housing Bed/Unit Roster

- Located under the Coordinated Entry for Families section

*Temporary Shelter for Families	
Family Shelter & Transitional Housing Bed/Unit Roster	RUN
Family Shelter Length of Stay: Expected Exit and Extension Services	RUN

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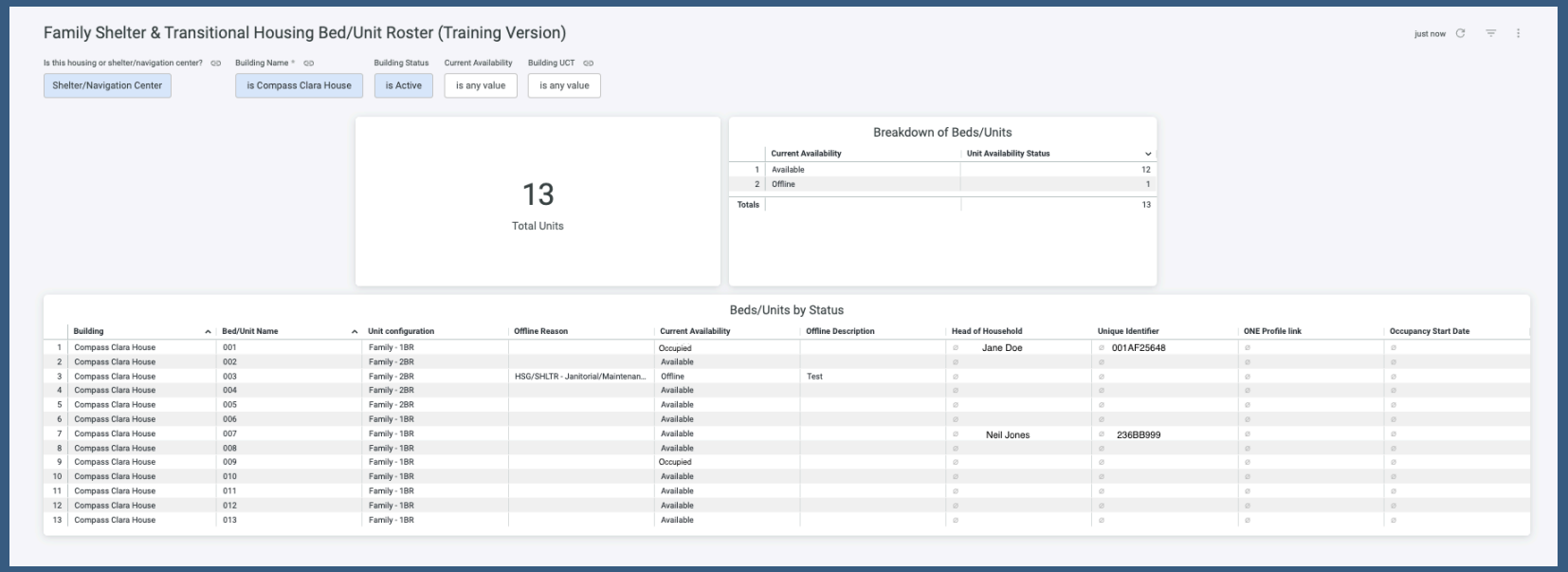
Shelter & Transitional Housing Bed/Unit Roster

- Roster organized by bed/unit number
- All beds/units in your buildings with associated status
- If bed/unit is occupied, the HoH is listed



Family Shelter & Transitional Housing Bed/Unit Roster (Training Version)

just now

Is this housing or shelter/navigation center?	Building Name *	Building Status	Current Availability	Building UCT
Shelter/Navigation Center	is Compass Clara House	is Active	is any value	is any value

13
Total Units

Breakdown of Beds/Units

	Current Availability	Unit Availability Status
1	Available	12
2	Offline	1
Totals		13

Beds/Units by Status

	Building	Bed/Unit Name	Unit configuration	Offline Reason	Current Availability	Offline Description	Head of Household	Unique Identifier	ONE Profile link	Occupancy Start Date
1	Compass Clara House	001	Family - 1BR		Occupied		Jane Doe	001AF25648		
2	Compass Clara House	002	Family - 2BR		Available					
3	Compass Clara House	003	Family - 2BR	HSG/SHLTR - Janitorial/Maintenan...	Offline	Test				
4	Compass Clara House	004	Family - 2BR		Available					
5	Compass Clara House	005	Family - 2BR		Available					
6	Compass Clara House	006	Family - 1BR		Available					
7	Compass Clara House	007	Family - 1BR		Available		Neil Jones	236BB999		
8	Compass Clara House	008	Family - 1BR		Available					
9	Compass Clara House	009	Family - 1BR		Occupied					
10	Compass Clara House	010	Family - 1BR		Available					
11	Compass Clara House	011	Family - 1BR		Available					
12	Compass Clara House	012	Family - 1BR		Available					
13	Compass Clara House	013	Family - 1BR		Available					

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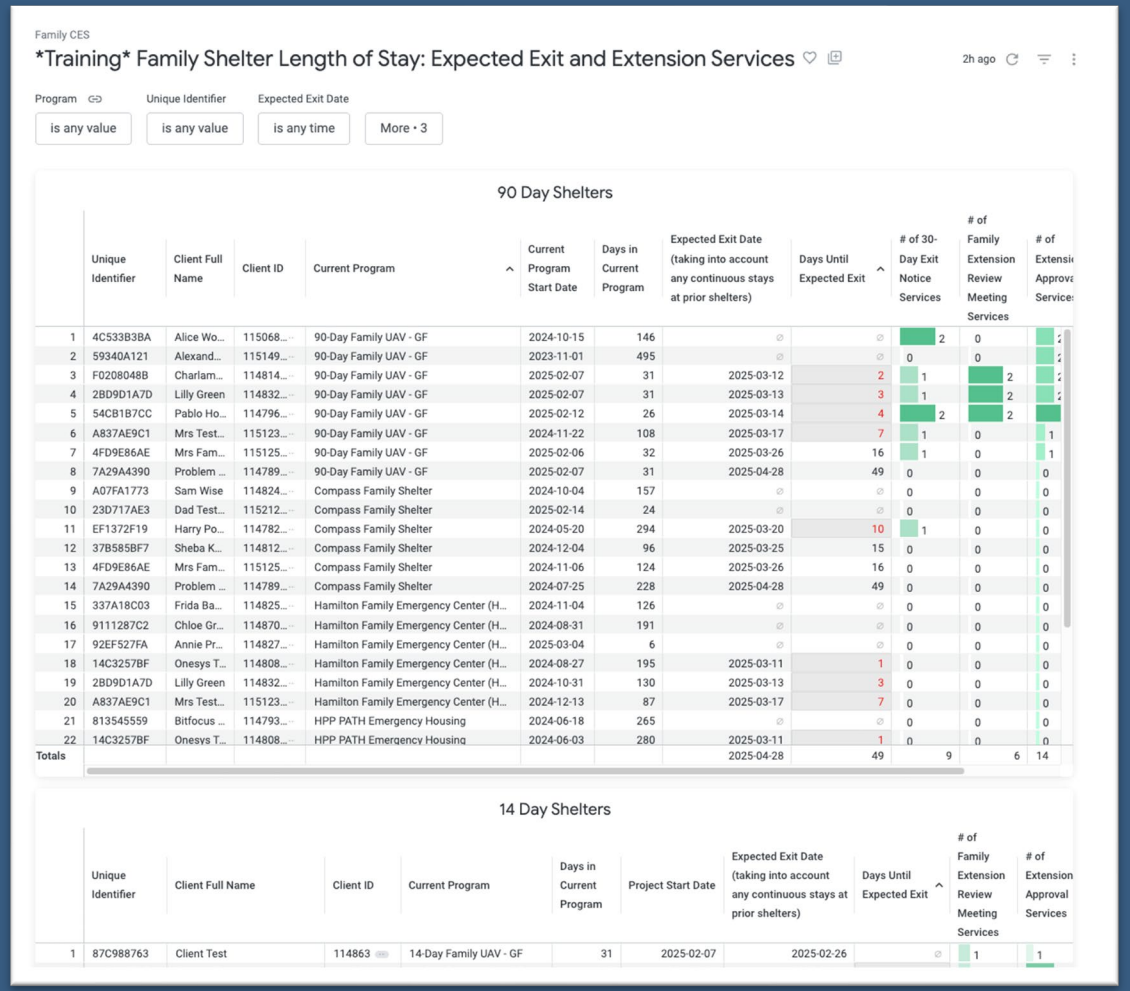
Family Shelter Length of Stay: Expected Exit and Extension Services

- Report added to Data Analysis tab (under Temporary Shelter for Families subsection)
- Displays:
  - i. Days in Current Shelter
  - ii. Family's expected exit date
  - iii. The number of the days until the family's expected exit
  - iv. The number of shelter extension services by type that have been logged for the family
- Report has been updated to draw its data from the extension and exit services



Family CES

Training Family Shelter Length of Stay: Expected Exit and Extension Services

2h ago

Program: is any value | Unique Identifier: is any value | Expected Exit Date: is any time | More • 3

90 Day Shelters

	Unique Identifier	Client Full Name	Client ID	Current Program	Current Program Start Date	Days in Current Program	Expected Exit Date (taking into account any continuous stays at prior shelters)	Days Until Expected Exit	# of 30-Day Exit Notice Services	# of Family Extension Review Meeting Services	# of Extensi Approva Service
1	4C533B3BA	Alice Wo...	115068...	90-Day Family UAV - GF	2024-10-15	146	∅	∅	2	0	2
2	59340A121	Alexand...	115149...	90-Day Family UAV - GF	2023-11-01	495	∅	∅	0	0	2
3	F0208048B	Charlam...	114814...	90-Day Family UAV - GF	2025-02-07	31	2025-03-12	2	1	2	2
4	2BD9D1A7D	Lilly Green	114832...	90-Day Family UAV - GF	2025-02-07	31	2025-03-13	3	1	2	2
5	54CB1B7CC	Pablo Ho...	114796...	90-Day Family UAV - GF	2025-02-12	26	2025-03-14	4	2	2	
6	A837AE9C1	Mrs Test...	115123...	90-Day Family UAV - GF	2024-11-22	108	2025-03-17	7	1	0	1
7	4FD9E86AE	Mrs Fam...	115125...	90-Day Family UAV - GF	2025-02-06	32	2025-03-26	16	1	0	1
8	7A29A4390	Problem ...	114789...	90-Day Family UAV - GF	2025-02-07	31	2025-04-28	49	0	0	0
9	A07FA1773	Sam Wise	114824...	Compass Family Shelter	2024-10-04	157	∅	∅	0	0	0
10	23D717AE3	Dad Test...	115212...	Compass Family Shelter	2025-02-14	24	∅	∅	0	0	0
11	EF1372F19	Harry Po...	114782...	Compass Family Shelter	2024-05-20	294	2025-03-20	10	1	0	0
12	37B585BF7	Sheba K...	114812...	Compass Family Shelter	2024-12-04	96	2025-03-25	15	0	0	0
13	4FD9E86AE	Mrs Fam...	115125...	Compass Family Shelter	2024-11-06	124	2025-03-26	16	0	0	0
14	7A29A4390	Problem ...	114789...	Compass Family Shelter	2024-07-25	228	2025-04-28	49	0	0	0
15	337A18C03	Frida Ba...	114825...	Hamilton Family Emergency Center (H...	2024-11-04	126	∅	∅	0	0	0
16	9111287C2	Chloe Gr...	114870...	Hamilton Family Emergency Center (H...	2024-08-31	191	∅	∅	0	0	0
17	92EF527FA	Annie Pr...	114827...	Hamilton Family Emergency Center (H...	2025-03-04	6	∅	∅	0	0	0
18	14C3257BF	Onesys T...	114808...	Hamilton Family Emergency Center (H...	2024-08-27	195	2025-03-11	1	0	0	0
19	2BD9D1A7D	Lilly Green	114832...	Hamilton Family Emergency Center (H...	2024-10-31	130	2025-03-13	3	0	0	0
20	A837AE9C1	Mrs Test...	115123...	Hamilton Family Emergency Center (H...	2024-12-13	87	2025-03-17	7	0	0	0
21	813545559	Bitfocus ...	114793...	HPP PATH Emergency Housing	2024-06-18	265	∅	∅	0	0	0
22	14C3257BF	Onesys T...	114808...	HPP PATH Emergency Housing	2024-06-03	280	2025-03-11	1	0	0	0
Totals							2025-04-28	49	9	6	14

14 Day Shelters

	Unique Identifier	Client Full Name	Client ID	Current Program	Days in Current Program	Project Start Date	Expected Exit Date (taking into account any continuous stays at prior shelters)	Days Until Expected Exit	# of Family Extension Review Meeting Services	# of Extension Approval Services
1	87C988763	Client Test	114863	14-Day Family UAV - GF	31	2025-02-07	2025-02-26	∅	1	1

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Resources

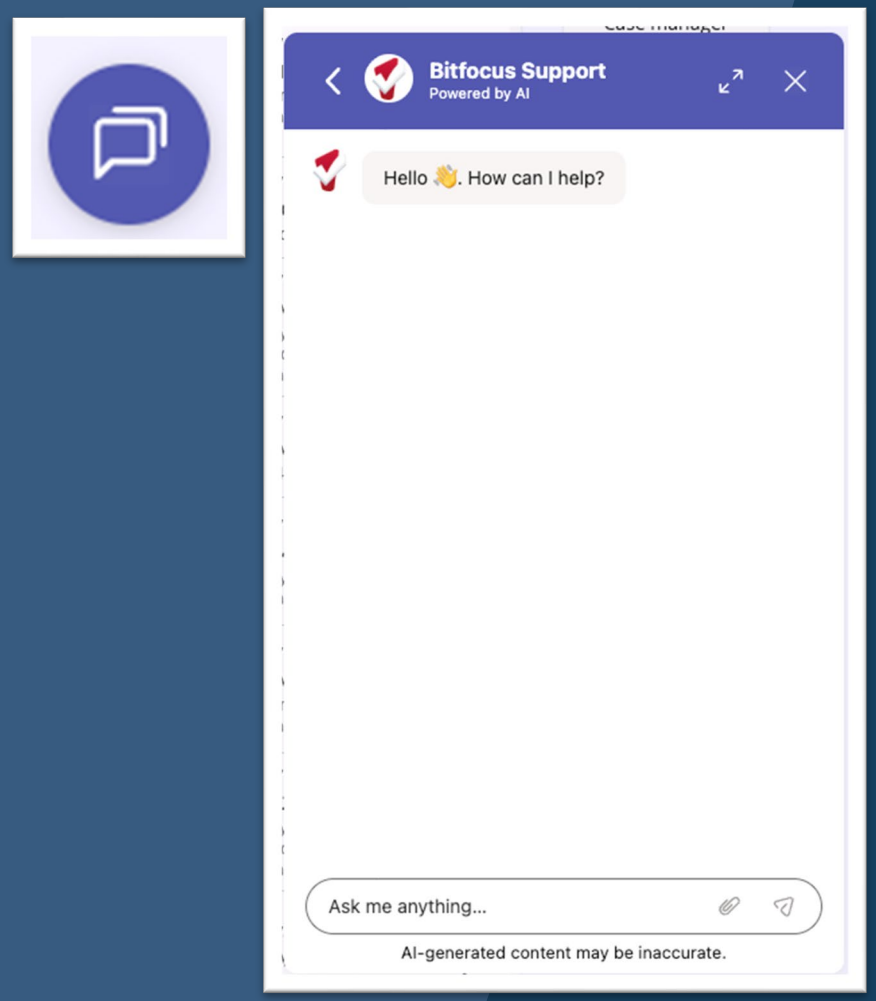
Bitfocus Help Desk

- onesf@bitfocus.com
- 415.429.4211

ONESF Help Center Website:

- onesf.bitfocus.com
- Slides and recording for today's training will be posted under *Training Materials -> Temporary Shelter* (menu at top)
  - https://onesf.bitfocus.com/temporary-shelter

Help Desk Widget (In ONE System and on ONESF Help Center Website)



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