



Bitfocus



DEPARTMENT OF
HOMELESSNESS AND
SUPPORTIVE HOUSING

TAY Transitional Housing Workflow Inventory

Agenda

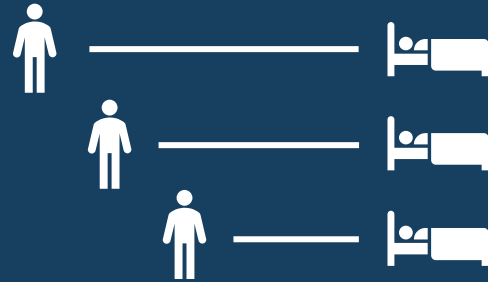
- Inventory
- Workflow
 - Enrollment and Unit Assignment
 - Exits and Denial of Service
 - Unit Status/Management
- Reports
- Questions



Inventory

Intro to Inventory

- **Inventory** is matching a client to the particular unit they are living in, with that information stored in ONE.



- You've already been doing **enrollments** – that's most of the work.
- Using **inventory** unlocks real-time data on occupancy/vacancy.
- Inventory allows for **referrals** within ONE (coming in the future).

TAY Transitional Housing Workflow

TAY Transitional Housing Workflow



Enrollment



Enroll household



Collect as much information
as possible



Assign to unit



Client Record Review

Search for Existing Client Records

The screenshot shows the Bitfocus web application interface. At the top, a dark blue navigation bar contains a 'SEARCH' button with a magnifying glass icon, circled in yellow and labeled with a yellow '1' and an arrow. Below this, the main content area has a header 'SEARCH FOR A CLIENT' and an 'ADD CLIENT +' button. A search input field contains the text 'Alex' and is labeled with a yellow '2' and an arrow. Below the input field is a 'SEARCH' button. A table of search results is displayed below the input field. The table has columns for 'Date of Birth', 'Age', 'Last Four SSN', 'Last Updated', and 'ROI'. Two results are shown: 'Alex Test' and 'Alexander Robbins (Alex)'. The 'Alexander Robbins (Alex)' row has a green 'Yes' button in the ROI column, which is circled in yellow and labeled with a yellow '3' and an arrow. To the right of the search results, there is a section titled 'Your recent client searches:' which lists 'Alexander Robbins'.

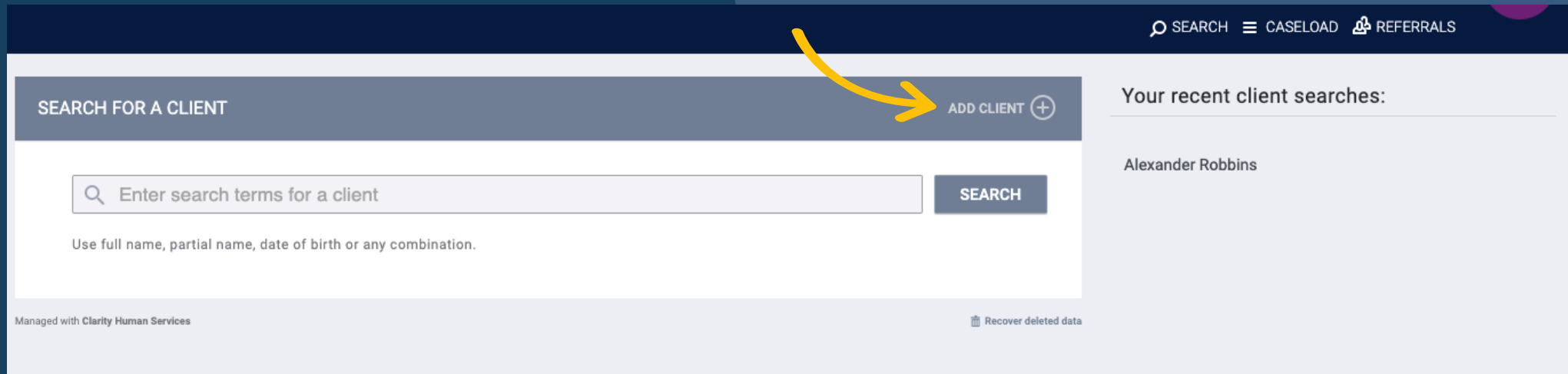
	Date of Birth	Age	Last Four SSN	Last Updated	ROI
Alex Test	12/12/1985	38	4044	04/30/2024	Missing
Alexander Robbins (Alex)	02/13/1989	35	4354	02/21/2024	Yes

Tip! Search the first three letters of the first and last name to account for alternate spellings. For example, search "bar bon" for Barry Bonds. You can also search by date of birth or Social Security number.

Creating New Client Records

If you can't identify an existing profile, **create** a new one.

Please search alternate spellings or date of birth to **make sure a profile does not already exist**.



The screenshot displays the Bitfocus web application interface. At the top, a dark blue navigation bar contains the links 'SEARCH', 'CASELOAD', and 'REFERRALS'. Below this, a light gray sidebar on the left features a 'SEARCH FOR A CLIENT' section with a search input field and a 'SEARCH' button. A yellow arrow points from the 'ADD CLIENT' button (marked with a plus icon) in the top right of the sidebar to the search input field. The main content area on the right shows 'Your recent client searches:' with a list containing 'Alexander Robbins'. At the bottom of the sidebar, it says 'Managed with Clarity Human Services' and 'Recover deleted data'.

Creating New Client Records: ROI

Collect a Release of Information (ROI) for any new client. Document consent in ONE

Clients must receive a copy of the Privacy Notice.

CREATE A NEW CLIENT

Social Security Number

- - -

Quality of SSN

Select

▼

Last Name

First Name

Quality of Name

Select

▼

Quality of DOB

Select

▼

Date of Birth

__/__/__

ADD RECORD

CANCEL

RELEASE OF INFORMATION

Permission

Yes

▼

Start Date

/2026

25

End Date

/2029

25

Documentation

Select

▼

Tip! Details about the ROI and Privacy Notice available at: <https://onesf.bitfocus.com/dhsh-privacy-practice-roi>

Enrollment

The screenshot shows a web application interface for enrollment. At the top is a dark navigation bar with the following tabs: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, REFERRALS, CONTACT, and LOCATION. A yellow arrow labeled '1' points to the 'PROGRAMS' tab. Below the navigation bar is a section titled 'PROGRAM HISTORY' containing a table with the following data:

Program Name	Start Date	End Date	Type
Emergency Shelter – Entry Exit TRAIN	01/16/2026	01/22/2026	Individual

Below the history section is a section titled 'PROGRAMS: AVAILABLE' containing a list of two programs, each with a dropdown arrow:

- Fake Adult CE Program
- Fake Nav Center

A yellow circle labeled '2' highlights the dropdown arrow for 'Fake Nav Center'. A yellow arrow labeled '3' points to an 'ENROLL' button located at the bottom right of the interface.

Enrollment

Enroll 'Fake Nav Center' program

Program Date 04/24/2026 

TRANSLATION ASSISTANCE NEEDED

Translation Assistance Needed No 

Are you interested in Travel and Relocation Services outside of San Francisco? No 

TEMPORARY SHELTER QUESTIONS

Locker #

Are you Arriving from an Encampment?
(Defined as 6 or More Tents/Structures or Inhabited Vehicles/RVs on One Block?) No 

Are you Arriving with any Pets? Yes  Pet Type Support/Companion 

Do you have any Special Accommodations? No 

LOCATION INFORMATION

Where were you Staying Immediately Prior to Coming to Temporary Shelter? 

- Collect as much information as possible
- Avoid using “Client Refused” or “Data not Collected” whenever possible

Unit Assignment

- Add Start Date
- **Leave End Date blank**
- Click *Available Units*
 - Click *Client Profile*
 - Select an available unit

ADD UNIT/BED

Start Date 08/23/2023 2:00 PM

End Date

Eligibility Override

Available Units/Beds Select...

Client Profile Only

- Bed 003 (Hope Hall, Hope Hall Navig...
- Bed 004 (Hope Hall, Hope Hall Navig...
- Bed 005 (Hope Hall, Hope Hall Navig...
- Bed 006 (Hope Hall, Hope Hall Navig...
- Bed 008 (Hope Hall, Hope Hall Navig...
- Bed 11 (Hope Hall, Hope Hall Navigat...
- Bed 12 (Hope Hall, Hope Hall Navigat...

ADD

Bed/Unit Assignment

- Unit assignment **only shows in the HoH record**
 - Non-HoH will not have a unit assignment

PROGRAM: EVERGREEN EMERGENCY SHELTER	
Enrollment	History
Provide Services	Assessments
Notes	Files
Chart	Units/Beds
Forms	
Unit	Start Date
Bed 004	05/20/2024 8:30 AM
Evergreen Emergency Shelter, Evergreen Emergency Shelter	

A note about unit types

- Depending on the program, you may have 'unit based' or 'slot based' inventory
 - **Unit based** represents a physical location in the real world (e.g., 226 Jules, Unit A)
 - **Slot based** represents a program opening, not tied to a particular building or location (e.g., Slot 001)
 - Scattered site programs that do not use Master Lease agreements are typically slot based
 - A slot may represent a type of program opening (e.g., High Needs Slot 002, Parenting Slot 005)
 - Numerical order for slots is irrelevant; Slot 001 does not need to be filled before Slot 002.

Individualized Housing Support Plan Assessment

- Service plan to help support clients in the housing location process
- Required within 30 days of enrollment
- Video training [available online](#)

The screenshot shows a web application interface for a client named Jordan Davis. The top navigation bar includes links for PROFILE, HISTORY, SERVICES, PROGRAMS (which is highlighted), ASSESSMENTS, NOTES, FILES, REFERRALS, CONTACT, and LOCATION. Below this, a header indicates the current program is 'JUST HOME'. A secondary navigation bar contains links for Enrollment, History, Provide Services, Assessments (highlighted), Notes, Files, Forms, and an Exit button. The main content area is titled 'Assessments' and includes a link 'LINK FROM ASSESSMENTS'. It displays a list of assessment types, each with a 'START' button. The 'Pre Move-In (Housing Navigation) IHSP Assessment' is highlighted with a red rectangular box. Other assessments listed include 'Status Update Assessment', 'Annual Assessment', 'Special Assessment for Shallow Subsidy Program', and 'Temporary Shelter Case Management Assessment'.

Assessment Type	Action
Status Update Assessment	START
Annual Assessment	START
Pre Move-In (Housing Navigation) IHSP Assessment	START
Special Assessment for Shallow Subsidy Program	START
Temporary Shelter Case Management Assessment	START

Transferring Beds/Units

Transferring Beds/Unit

End Current Unit Stay

- Add an end date to the current unit

The screenshot shows the 'EDIT UNIT' modal for unit 002. The modal has a title bar with a close button. It contains two date pickers: 'Start Date' set to 08/01/2025 12:00 AM and 'End Date' set to 11/28/2025 9:00 AM. The 'End Date' is highlighted with a red box. Below the date pickers is the text 'Current Instance time: 12/01/2025 9:41 AM'. At the bottom are two buttons: 'SAVE CHANGES' and 'CANCEL'.

Assign to a New Unit

- Start date/time shouldn't overlap with previous unit

The screenshot shows the 'ADD UNIT/BED' modal. It has a title bar with an 'ADD UNIT' button. The modal contains several fields: 'Start Date' set to 11/28/2025 10:00 AM, 'End Date' (empty), 'Eligibility Override' (toggle off), 'Eligible For Partial Dates' (toggle off), and 'Available Units/Beds' set to 003 (Evergreen Emergency Shelter, Ever...). Below these fields is the text 'Current Instance time: 12/01/2025 9:42 AM'. At the bottom are two buttons: 'ADD' and 'CANCEL'.

Exits

Exits

- Exits occur when client is no longer staying at program
- Exiting from program automatically exits client from unit

Brad Jones

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM: JEFFERSON HOTEL - GF

Enrollment **History** Assessments Notes Files Units Forms

Program Service History

× Exit

Unit	Start Date	End Date
106 Jefferson Hotel, Jefferson Hotel	08/03/2022	08/03/2022
105 Jefferson Hotel, Jefferson Hotel	07/11/2022	07/12/2022

Automatic

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

Exit Reason	Destination
Exit to Permanent Housing	Rental by client, with housing subsidy
	Rental by client, no housing subsidy
Exit to Transitional Housing	Transitional Housing
Exit to Institutional Setting	Hospital
	Substance Use Treatment
	Jail

**Example
Reason/
Destination
Combos**
(there are many
others!)

Denial of Service

Denial of Service Workflow



Exit guest from
program and unit



Record 'Rule
Violation' as *Exit
Reason*



Record DoS under
Program Restrictions

Exit Reason

Exit Reason = *Rule Violation*

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES REFERRALS CONTACT LOCATION

Enrollment History Provide Services Assessments Notes Files Units/Beds Forms × Exit

End Program for client Tanya Anderson

Program Exit Date 03/04/2025 

Exit Reason Rule Violation 

Destination Select 

 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.

*Reminder: enter
Program Restriction
after saving the exit*

Enter Denial of Service (Program Restriction)



- Enter denial of service as a Program Restriction



- Found on the right sidebar of exit screen



- Enter restrictions for any household member it applies to



- Can also be found under *Notes* tab

Program Restriction

PROGRAM RESTRICTIONS

Start Date

03/04/2025

25

End Date

__/__/__

25

Program(s)

Bayview SAFE Navigation Center - HHAP+GF+ERAF

▼

Reason For Program Restriction

1b Acts of violence.

Note

Enter reason

2f Having unauthorized guests at the shelter.
2g Having excessive property within the shelter that extends beyond the clients' designated bed area or assigned room.
2h Verbal harassment, intimidation or bullying of other guests, staff, or volunteers.
2i Unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature, including nudity.
Other rule violation (provide description in Note)
(FAMILY SHELTER) Acts of violence or threat of violence.
(FAMILY SHELTER) Alcohol, illegal drugs/paraphernalia use or selling on site.
(FAMILY SHELTER) Arson.
(FAMILY SHELTER) Case management violation (provide description in Note)
(FAMILY SHELTER) Disruptive behavior that is ongoing, uncontrollable, and presents a clear risk to the safety of the facility and families.
(FAMILY SHELTER) Not providing tuberculosis clearance.
(FAMILY SHELTER) Possession or display of a weapon, including firearms. Firearms will not be stored.
(FAMILY SHELTER) Property theft, destruction, or interference that endangers another guest's ability to shelter safely or disrupts vital site operations.
(FAMILY SHELTER) Other rule violation (including non-immediate rule violations, provide description in Note)
(TAY TRANSITIONAL) Acts of violence.
(TAY TRANSITIONAL) Credible threats of violence that include specific actions or plans.
(TAY TRANSITIONAL) Possession or display of a weapon, including but not limited to firearms, and knives. Firearms will not be stored.
(TAY TRANSITIONAL) Disruptive behavior that is ongoing, uncontrollable, and presents a clear risk to the safety of the facility.
(TAY TRANSITIONAL) Arson.
(TAY TRANSITIONAL) Manufacturing and/or sale of illegal drugs not associated with a prescription or alcohol.
(TAY TRANSITIONAL) Property destruction or interference that endangers another participant's ability to shelter safely or disrupts vital site operations.
(TAY TRANSITIONAL) Property destruction to a room or trailer that makes the room uninhabitable for health or safety reason.
(TAY TRANSITIONAL) Other rule violation (including non-immediate rule violations, provide description in Note).

Private

Date DoS went into effect

Expiration date of DoS

Select program client is restricted from

Non-Immediate Denial of Service Workflow



Record services: 'Rule Violation'



Exit guest from program and unit



Record rule violation details on exit screen



Record DoS under *Program Restrictions*

When the maximum # of violations is reached

Rule Violation: Non-Immediate DoS Services

- Use services to track non-immediate rule violations
- Log date of the violation & notes

Only used to track violations. Not the issuance of a DOS.

The screenshot shows a web application interface for logging a rule violation. The top navigation bar includes links for PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this, a sub-navigation bar has links for Enrollment, History, Provide Services (which is highlighted), Events, Assessments, Notes, Files, Chart, Units/Beds, and Forms. An 'Exit' button is in the top right corner of the sub-navigation bar. The main content area is titled 'Services' and contains a form for logging a 'Rule Violation (Non-immediate Category)'. The form includes a dropdown menu for 'Other' with a downward arrow. The main text area contains the following text: 'a) Repeated failure to wear mask for confirmed COVID-19 positive individual in COVID-19 isolation period. Not outright refusal but failure to comply.' Below this text, there is a field for 'Event Date' with the value '08/24/2023' and a calendar icon. Below the date field, there is a 'Service Note' section with a text area and a toolbar containing buttons for bold (B), italic (I), bulleted list, and numbered list. A 'SUBMIT' button is located at the bottom right of the form.

Unit Status

Unit Status/Availability

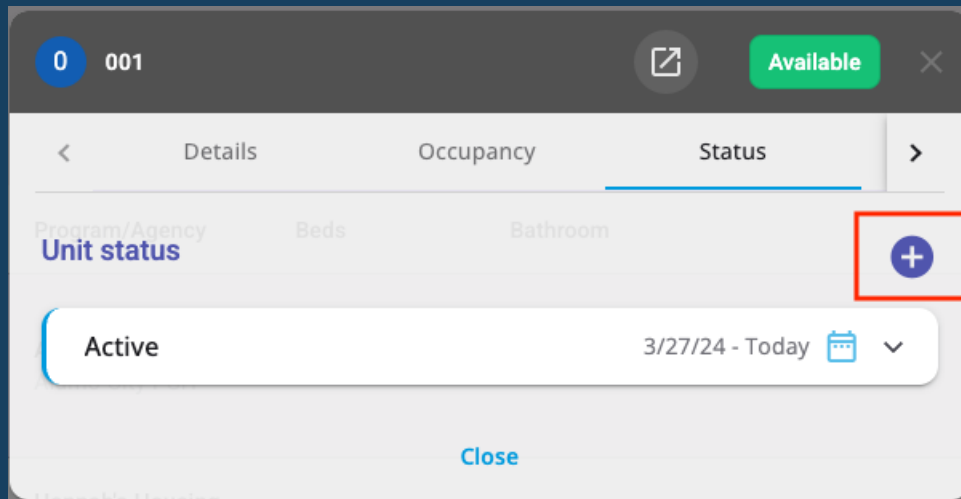
- *Unit Status* can be changed from the dashboard
- Provides the ability to reflect a unit's status in real-time

Status	Availability	Description
Active	Available	Unit is available to receive guest
	Occupied	Guest is living in the unit
Offline		Unit is temporarily unavailable (e.g., due to needed maintenance).
Inactive		Unit not available for the foreseeable future (e.g., used as an office). Do not use this status without approval, please call or email the Help Desk for assistance.

Offline Status

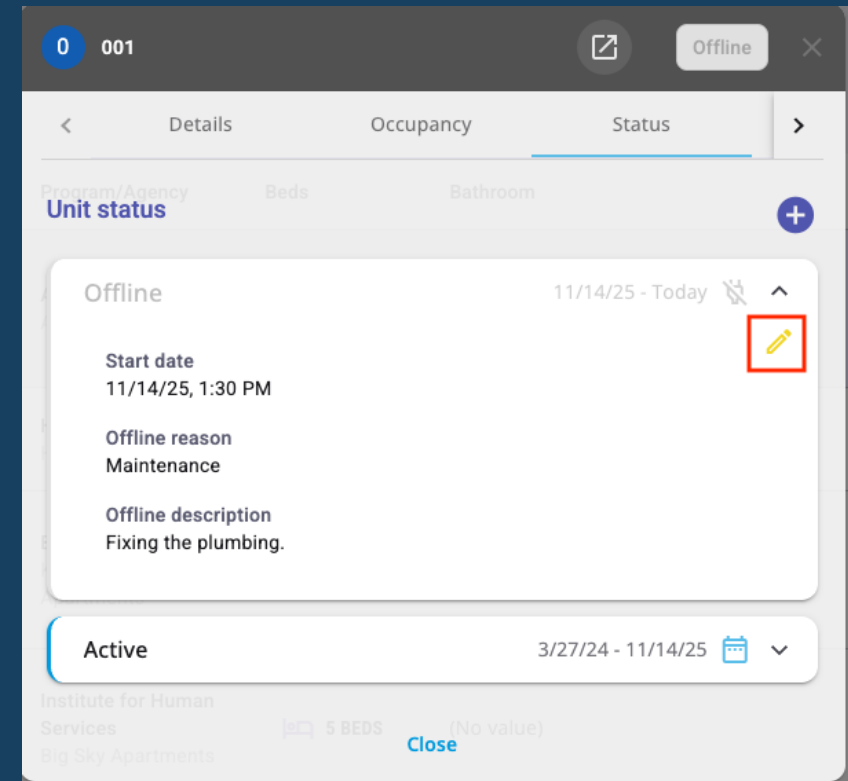
Creating

- Click “+” sign
- Leave End Date blank



Editing/Ending

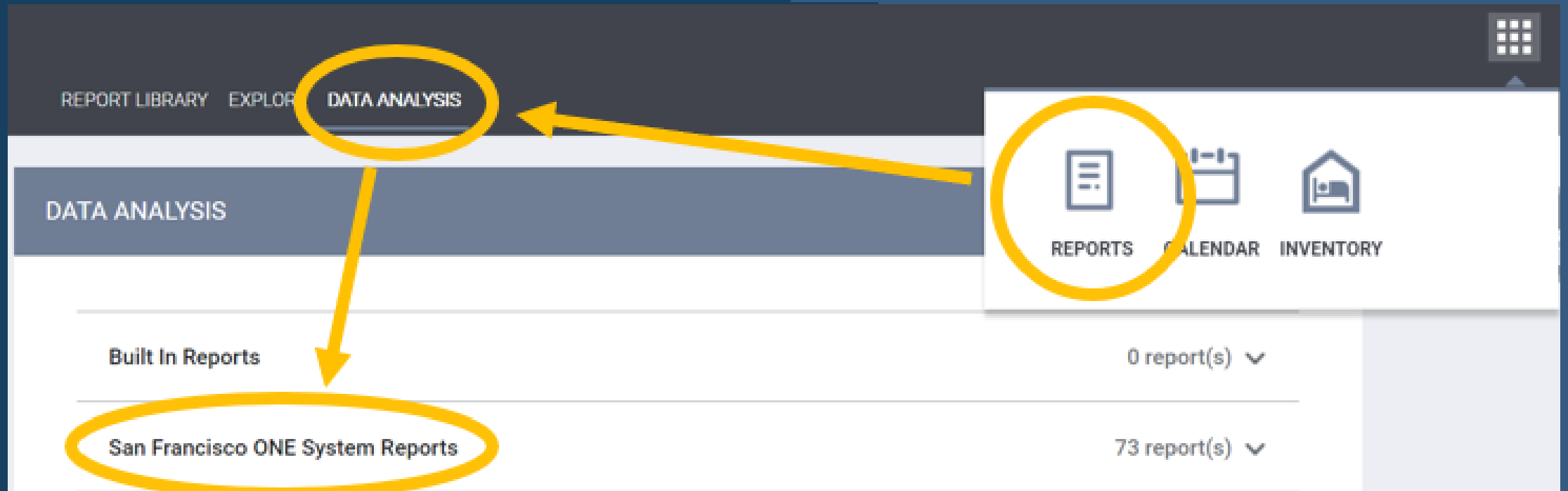
- Click on the pencil icon
- To end, enter End Date



Reports

Inventory Reports

- Located under the *Data Analysis Tab*



Inventory Reports

- All reports found under **TAY Transitional Housing**
 - Bed/Unit Roster
 - Client Roster

REPORT LIBRARY		EXPLORE	DATA ANALYSIS
TAY Transitional Housing			
TAY Transitional Housing - Bed/Unit Roster			▶ RUN
TAY Transitional Housing - Client Roster			▶ RUN
TAY Transitional Housing - Inactive and Offline Details			▶ 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	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	Occupied		Will Clark	00022		2023-08-17
2		Bed 002	Adult- Single Bed	Available					
3		Bed 003	Adult- Single Bed	Occupied		Juan Marichal	00027		2023-08-28
4		Bed 004	Adult- Single Bed	Available					
5		Bed 005	Adult- Single Bed	Occupied		Barry Bonds	00025		2023-07-18

Client Roster

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

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	Tim Lincecum				2023-08-30	∅	7	∅		∅	
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

Questions?

