



Bitfocus



DEPARTMENT OF
HOMELESSNESS AND
SUPPORTIVE HOUSING

TAY Transitional Housing Workflow Inventory

Agenda

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



What is INVENTORY?

Inventory Overview

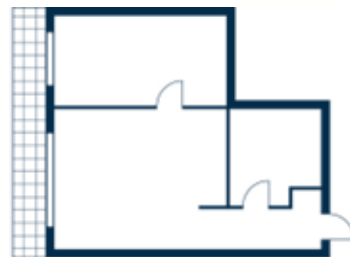
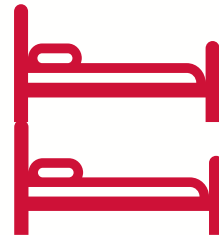
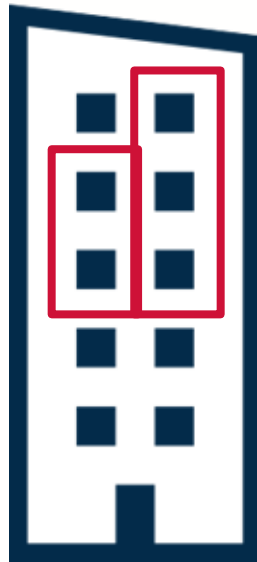
Buildings



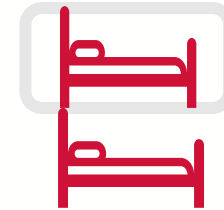
Unit Configurations



Units/Beds



Bed 001



Bed 002



INVENTORY Module Dashboard

- Shows detailed unit info
- Quick occupancy information
- Ability to update status

The screenshot displays the INVENTORY Module Dashboard interface. At the top right, there is a notification icon with '63' and the text 'Knowledge and Training System'. Below this are navigation links for 'DASHBOARD', 'SEARCH', and 'CASE'. The main content area features a search bar and filters for 'Availability', 'Agency', 'Site', and 'Building'. The 'Inventory' section contains a table with the following data:

<input type="checkbox"/>	Unit Name/Type	Availability	Building	Program/Agency	Beds
<input type="checkbox"/>	001 Adult 1 Bedroom	Offline	Frio River Apartments 230 S Alamo St San Antonio, TX 78205	Alamo City Alamo City PSH	1 BED
<input type="checkbox"/>	001 Adult studio - CH-dedicated	Available	Downtown Tower 284 Patridge St Brent, AL 35034	Hannah's Housing Hannah's PSH	1 BED
<input type="checkbox"/>	001 Adult-1 bedroom	Available	King Street Apartments 6029 Patton Ranch Rd Austin, TX 78735	Big River Housing King Street Apartments	1 BED
<input type="checkbox"/>	001 HH without Children	Pending Occupancy	SSVF RRH Building 103 N Howard Ave Tampa, FL 33606	Institute for Human Services Big Sky Apartments	5 BEDS
<input type="checkbox"/>	001 (Adjoining) Family- Private Room (Adjoining)	Available	Bldg 1 2861 John D Odom Rd Dothan, AL 36303	Tina Test Agency Family Shelter	3 BEDS
<input type="checkbox"/>	001 Private Adult Single Adult	Offline	Bldg 1 2861 John D Odom Rd Dothan, AL 36303	Tina Test Agency Men's Night by Night	1 BED

TAY Transitional Housing Workflow

TAY Transitional Housing Workflow



Enrollment



Enroll household



Collect as much information
as possible



Assign to unit

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...

AD

Client Profile Only

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

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 Evergreen Emergency Shelter, Evergreen Emergency Shelter	05/20/2024 8:30 AM

Enrollment Sidebar

- Unit assignments are visible in the enrollment sidebar

*Remember...
This only
shows for the
HoH*

104 DAYS ACTIVE PROGRAM	
Program Type:	Individual
Program Start Date:	07/06/2022
Assigned Staff:	Melissa Wheeler
Head of Household:	Randall Hall <input type="checkbox"/>
Unit Name:	104

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 displays a user profile for Jordan Davis with a navigation menu including PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, REFERRALS, CONTACT, and LOCATION. The main content area is titled 'PROGRAM: JUST HOME' and features a sub-menu with Enrollment, History, Provide Services, Assessments (selected), Notes, Files, Forms, and an Exit button. Below this, the 'Assessments' section is shown with a 'LINK FROM ASSESSMENTS' option. A list of assessment types is provided, each with a 'START' button:

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 'Units/Beds' interface for the 'EVERGREEN EMERGENCY SHELTER' program. The 'Units/Beds' tab is selected and highlighted with a red box. Below the navigation bar, a table lists units, with unit '002' highlighted by a red box. An 'EDIT UNIT' modal is open, showing the 'End Date' field with the value '11/28/2025 9:00 AM' highlighted by a red box. The modal also shows the 'Start Date' as '08/01/2025 12:00 AM' and 'SAVE CHANGES' and 'CANCEL' buttons.

Assign to a New Unit

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

The screenshot shows the 'ADD UNIT/BED' modal. The 'Start Date' field is set to '11/28/2025 10:00 AM' and the 'End Date' field is empty. The modal also includes 'Eligibility Override' and 'Eligible For Partial Dates' toggle switches, and an 'Available Units/Beds' dropdown menu showing '003 (Evergreen Emergency Shelter, Ever...'. The 'ADD' and 'CANCEL' buttons are at the bottom.

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 x Exit

Program Service History

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

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

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

Date DoS went into effect

Start Date 03/04/2025

End Date / /

Expiration date of DoS

Program(s) Bayview SAFE Navigation Center - HHAP+GF+ERAF

Select program client is restricted from

Reason For Program Restriction 1b Acts of violence.

Enter reason

Note

Enter notes

Private

- 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).

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

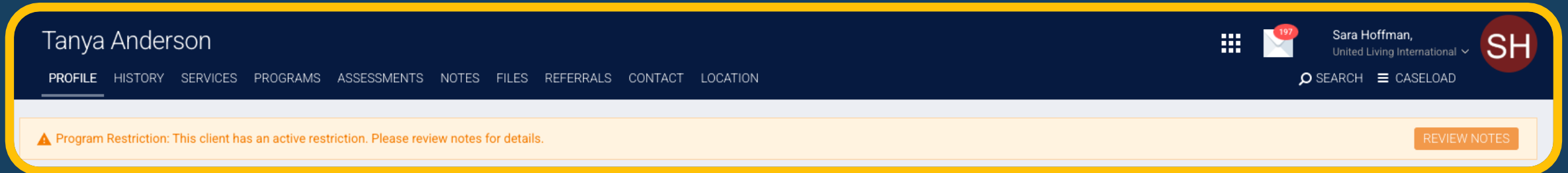
- Use services to track non-immediate rule violations
- Log date of the violation & notes

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

The screenshot shows a web application interface for logging rule violations. The top navigation bar includes links for PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this, a secondary navigation bar has links for Enrollment, History, Provide Services (which is highlighted), Events, Assessments, Notes, Files, Chart, Units/Beds, and Forms, along with an Exit button. The main content area is titled "Services" and contains a section for "Rule Violation (Non-immediate Category)" with a dropdown menu set to "Other". The violation description is "a) Repeated failure to wear mask for confirmed COVID-19 positive individual in COVID-19 isolation period. Not outright refusal but failure to comply." The "Event Date" is set to "08/24/2023" with a calendar icon. Below the date is a "Service Note" field with a rich text editor containing buttons for Bold (B), Italic (I), Bulleted List, and Numbered List. A "SUBMIT" button is located at the bottom right of the form.

Alert Banner

- Alerts are visible for restrictions entered by your agency
- Shows on *Profile* Screen and under *Programs* Tab
- Click *Review Notes* to view details



The screenshot displays a user profile interface for Tanya Anderson. The header includes the name 'Tanya Anderson' and a navigation menu with options: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, REFERRALS, CONTACT, and LOCATION. On the right side of the header, there is a grid icon, a notification icon with a red badge showing '197', the user's name 'Sara Hoffman, United Living International' with a dropdown arrow, and a circular profile picture with the initials 'SH'. Below the header, a yellow alert banner is visible, containing a warning icon and the text: 'Program Restriction: This client has an active restriction. Please review notes for details.' A 'REVIEW NOTES' button is located on the right side of the banner.

Optional: Notes Tab

- Enter restrictions under Notes Tab
- View history of restrictions

The screenshot shows a web application interface with a dark blue navigation bar at the top. The 'NOTES' tab is highlighted with a red box and a yellow arrow pointing to it. Below the navigation bar, there are three main sections:

- PUBLIC ALERTS:** A section with a header bar and an 'ADD ALERT (+)' button. Below it is a large icon of a document with the text 'No results found'.
- PROGRAM RESTRICTIONS:** A section with a header bar and an 'ADD RESTRICTION (+)' button. Below it is a table with the following data:

Restricted Program(s)	Start_date	End_date
Proctor Place Apartments United Living International ⓘ	02/09/2025	(not set)
Sanctuary Shelter - ESG TRAIN - Episcopal Community Services ⓘ	02/18/2025	(not set)

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). Please call or email the help desk to be set to inactive or if it was accidentally made inactive.

Automatic Offline

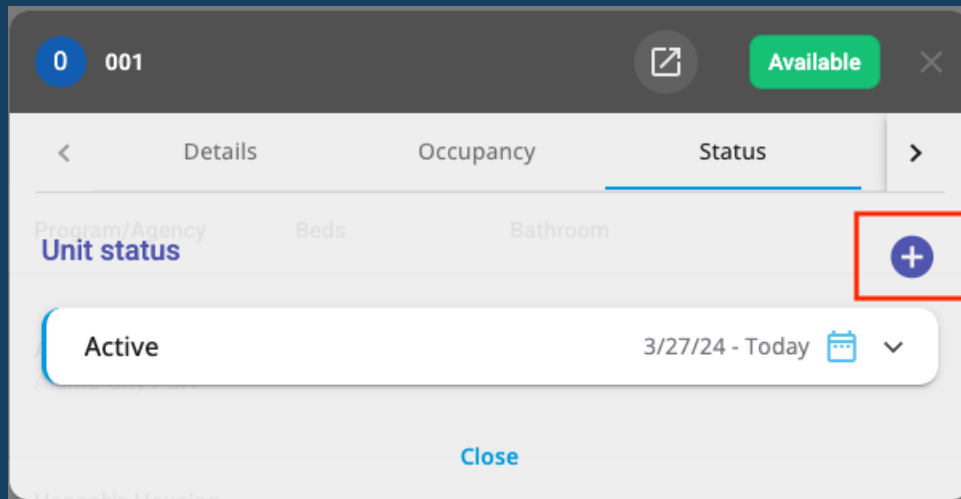
- The system will automatically switch the unit/bed to *Offline* when guest exits from the program.

The screenshot displays a web application interface for unit management. At the top, there are four filter buttons: 'Availability', 'Agency', 'Site', and 'Building'. Below the filters, two unit listings are shown. The first unit, '002', is labeled 'Family - 2BR' and '111 Page St, San Francisco, CA'. It has a green 'Available' status button. The second unit, '003', is also labeled 'Family - 2BR' and '111 Page St, San Francisco, CA'. Its status button is grey and labeled 'Offline', which is highlighted with a red rectangular box. Both unit listings include a list of funding sources: 'TRAIN - Compass Family Servi...', 'Compass Clara House', 'Compass Clara House', 'Compass Clara House', 'Compass Clara House - N/A', 'General Fund', and 'Prop C'. To the right of the listings is a map of San Francisco, showing the 'Western Addition' neighborhood. A location pin labeled '12' is visible on the map.

Offline Status

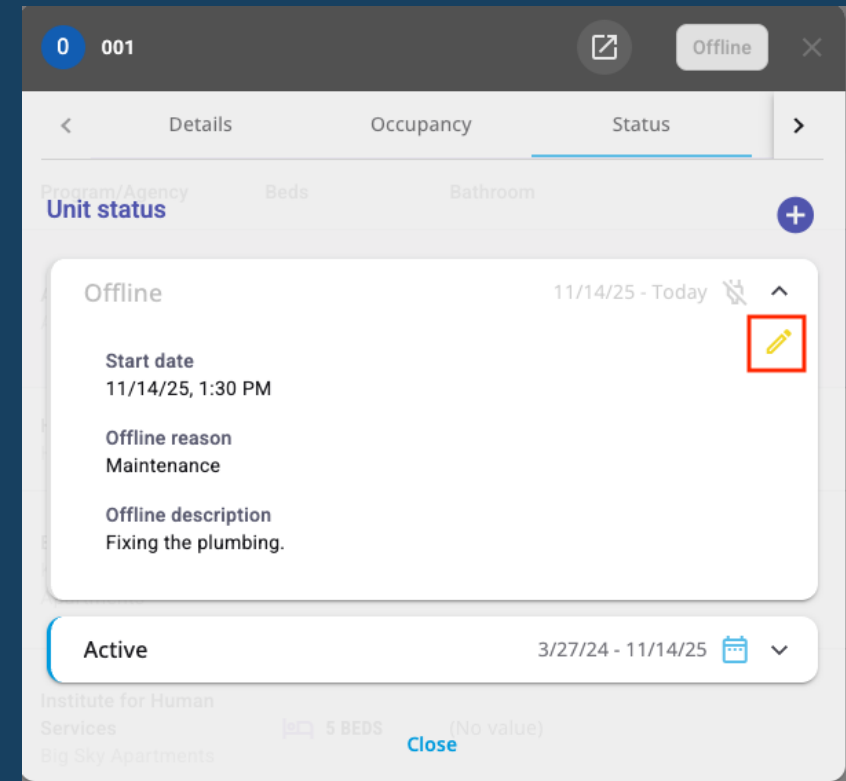
Creating

- Click “+” sign
- Leave End Date blank



Editing/Ending

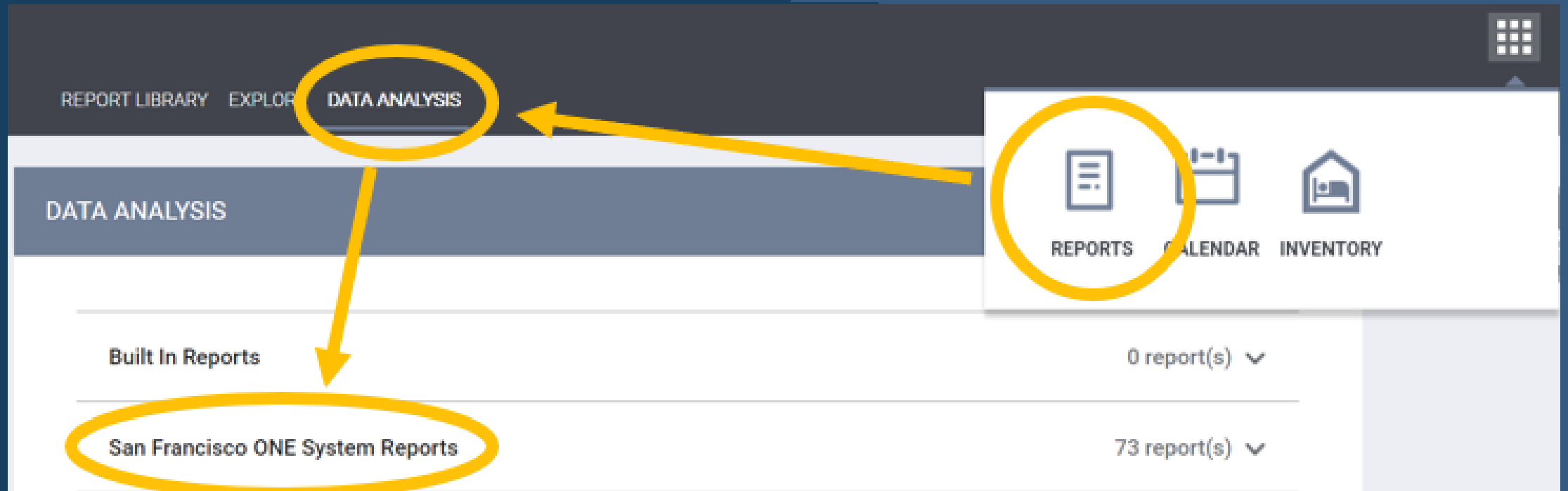
- Click on the pencil icon
- To end, enter End Date



Reports

Inventory Reports

- Located under the *Data Analysis Tab*



Inventory Reports

- All reports found under ***Temporary Shelter for Adults and Youth**
 - Bed/Unit Roster
 - Client Roster

vacancy Duration of PSH Units	⊙ RUN
*Temporary Shelter for Adults and Youth	
Adult & TAY Shelter Clients Close to Expiring or Already Expired Off the Queue	⊙ RUN
Referral Partner Daily Shelter Bed Allocations	⊙ RUN
Temporary Shelter - Bed Assignments and Statuses	⊙ RUN
Temporary Shelter - Bed/Unit Inventory Snapshot	⊙ RUN
Temporary Shelter - Bed/Unit Roster	⊙ RUN
Temporary Shelter - Client Roster	⊙ RUN
Temporary Shelter - Concurrent Enrollments	⊙ RUN
Temporary Shelter - Inactive and Offline Details	⊙ RUN

Temporary Shelter 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	

Temporary Shelter 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	Buster Posey				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?

