



Direct Entry into HMIS v2– HMIS Job Aid

This job aid will demonstrate how to enter a direct entry into HMIS. Programs that use direct entry enter their clients directly into HMIS and do not request referrals through Coordinated Entry. This job aid was updated in 2025 to reflect the new Units screen and unit management functionality for direct entry projects.

A special note for street outreach and night-by-night shelters: You may not be able to verify client demographics at the time of entry. In this case, as much information as can be gathered can be entered. If a name, DOB, and/or SSN cannot be verified or are given as partial/approximate, enter what is given and select the corresponding Data Quality fields as "Partial/Approximate."

Please note that if the Name Data Quality and Date of birth Data Quality fields are saved as "partial," "client doesn't know," "client prefers not to answer," or "data not collected," **an MCI ID search cannot be done.** MCI is the Master Client Index ID that DHS uses to associate client records for service history and in Clientview. Program involvement for clients without MCI IDs associated will not populate into Clientview and the data warehouse, but clients can still be enrolled into the street outreach or night-by-night project in HMIS.

Adding a direct entry into HMIS

Log into HMIS and select the *Projects* hyperlink on the upper right screen.

The screenshot shows the HMIS interface. At the top, there is a navigation bar with tabs for 'Clients', 'Projects', and 'Admin'. The 'Projects' tab is highlighted with a red box and a red arrow pointing to it. Below the navigation bar, the 'Clients' section is visible, containing a search bar and a 'Choose projects...' dropdown menu. The search bar has a placeholder text: 'Search Clients...'. The 'Choose projects...' dropdown menu has a placeholder text: 'Choose projects...'. There is also a 'Search' button next to the dropdown menu.

Click the name of the project.



Allegheny County HMIS - Training

Clients Projects Search Training Provider

Projects

Search Projects

Search by Project Name or ID

Displaying 14 of 14 records [Filters \(1\)](#)

Organization	Project Name	Project Type	Operating Period
☒ Training Organization	Bridge Training Program 1	Transitional Housing	08/01/2023 - 08/30/2050
☒ Training Organization	Direct Entry PSH- Special Population	PH - Permanent Supportive Housing	08/29/2023 - 08/30/2030
☒ Training Organization	Emergency Shelter- Family	Emergency Shelter - Entry Exit	08/29/2023 - 08/29/2050
☒ Training Organization	Emergency Shelter- Households without Children (night by night)	Emergency Shelter - Night-by-Night	08/29/2023 - 08/29/2050
☒ Training Organization	PATH SSO Linkage Training	Services Only	08/29/2023 - 08/29/2030
☒ Training Organization	PSH Training Program	PH - Permanent Supportive Housing	08/29/2023 - 08/30/2050
☒ Training Organization	Rental Assistance Training	Homelessness Prevention	08/29/2023 - 08/29/2050
☒ Training Organization	BRH ESG Training Program	PH - Rapid Re-Housing	08/09/2021 - Active
☒ Training Organization	SSO/Case Management Training program	Services Only	08/26/2023 - 08/29/2030
☒ Training Organization	Street Outreach Training	Street Outreach	08/29/2023 - 08/23/2050

<https://allegheny-hmis-training.openpath.host/projects>

Once the user has selected the project, to navigate to the Units screen, select the *Units* button on the lefthand pane

Project Close Yellow Sun PSH > Units

Yellow Sun PSH

Project Type
PH - Permanent Supportive Housing

Organization
[Blue Sky Organization](#)

Project ID 71d055...

Organization ID 42049f...

- Overview
- Enrollments
- Assessments
- Services
- Current Living Situations
- Referrals
- CONFIGURATION**
- Units**
- Inventory
- Funders
- CoCs
- HMIS Participation
- CE Participation

Units

[+ Add Units](#)

Capacity

Total Units: 15 Vacancies: 14

Households with Children Total: 10 • Occupied: 0 • Vacant: 10

Households without Children Total: 5 • Occupied: 1 • Vacant: 4

☒ Occupied ☐ Vacant

Manage Units

Displaying 15 of 15 units Columns (1) Filter

☐	Unit Type	Unit ID	Unit Group	Occupancy	Client Occupants	Referral Status	
☐	Households with Children	200918	Households with Children	Vacant		Not Accepting Referrals	⋮
☐	Households with Children	200919	Households with Children	Vacant		Not Accepting Referrals	⋮
☐	Households with Children	200920	Households with Children	Vacant		Not Accepting Referrals	⋮

UNIT GROUP
Households with Children
10 / 10 units vacant

UNIT GROUP
Households without Children
4 / 5 units vacant

[+ Add Unit Group](#)



Units Screen Navigation + Marking a Unit "Accepting Referrals"

In order to enroll a direct entry client or household, the user must ensure that a unit in the project is open to 'accepting a referral' and must change a vacant unit's status accordingly.

For more information on the Units screen navigation and functionality, please see the *Unit Screen and Unit Management* job aid.

Unit Type	Unit ID	Unit Group	Occupancy	Client Occupants	Referral Status	
☐ Households without Children	200782	Households without Children	Occupied	Lars Ulrich	Not Accepting Referrals	⋮
☐ Households without Children	200783	Households without Children	Vacant		Accepting Referrals	⋮
☐ Households without Children	200784	Households without Children	Vacant		Accepting Referrals	⋮
☐ Households without Children	200785	Households without Children	Vacant		Accepting Referrals	⋮
☐ Households without Children	200786	Households without Children	Occupied	Shirley Jones	Not Accepting Referrals	⋮

By default, an unoccupied unit will have the status "Not Accepting referrals." **Direct entry projects must change the unit/s status to be 'Accepting referrals' in order to enroll a client or household directly into their HMIS project.**

Households without Children	200780	Households without Children	Vacant	Not Accepting Referrals	View Unit Start Accepting Referrals View Unit Group
Households without Children	200781	Households without Children	Vacant	Not Accepting Referrals	⋮

To change a unit's status from "Not Accepting referrals" to "Accepting Referrals," select the unoccupied unit in the grid. Click the three-dot symbol at the right of the row; a small menu will display. Select the option to "Start Accepting referrals".



Households with Children 200921 Households with Children Vacant

View Unit
Start Accepting Referrals
View Unit Group

Updating the Status of Multiple Units at the Same Time

Providers, especially direct entry users, may find they need to mark multiple units available at the same time in order to enroll several households at once.

In order to mark units available en masse, users can select the checkbox that displays to the left of each vacant unit on the unit screen.

Allegheny County HMIS - Training

Dashboard Clients Projects Search Acting as Mary Ann Blue Sky Exit

Project Green Grass Emergency Shelter Units

Green Grass Emergency Shelter

Project Type Emergency Shelter - Entry Exit
Organization Blue Sky Organization
Project ID c31d87-
Organization ID 420491-

Overview
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Units

Capacity
Total Units: 5 Vacancies: 3
Households without Children Total: 5 • Occupied: 2 • Vacant: 3
● Occupied ● Vacant

UNIT GROUP
Households without Children
3 / 5 units vacant

Manage Units
Displaying 5 of 5 units Columns (1) Filter

☐	Unit Type	Unit ID	Unit Group	Occupancy	Client Occupants	Referral Status	
☐	Households without Children	200782	Households without Children	Occupied	Lars Ulrich	Not Accepting Referrals	
☐	Households without Children	200783	Households without Children	Vacant		Not Accepting Referrals	
☐	Households without Children	200784	Households without Children	Vacant		Not Accepting Referrals	
☐	Households without Children	200785	Households without Children	Vacant		Not Accepting Referrals	

If the project has multiple unit types, users will need to select the unit group (the unit group displays all the units of the same type in the project) to be navigated to the *View Unit Group* screen.

In the *View Unit Group* screen, select the associated checkboxes to the number of units to be made available. To mark all unoccupied units available, select the checkbox to the left of the *Unit Type* column at the top of the grid.

Once the user has selected the units to be made available, the *Start Accepting Referrals* button will display at the top of the screen; select the button to mark the units available.



Allegheny County HMIS - Training

Dashboard Clients Projects Search Acting as Mary Ann Blue Sky

Project Green Grass Emergency Shelter > Units > Households without Children

Green Grass Emergency Shelter

Project Type Emergency Shelter - Entry Exit

Organization Blue Sky Organization

Project ID c31d87..

Organization ID 42049f..

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VIEW UNIT GROUP

Households without Children

Total: 5 • Occupied: 2 • Vacant: 3

● Occupied ● Vacant

3 selected Start Accepting Referrals (3) Stop Accepting Referrals (0)

Displaying 5 of 5 units

☒	Unit Type	Unit ID	Occupancy	Client Occupants	Referral Status	
☐	Households without Children	200782	Occupied	Lars Ulrich	Not Accepting Referrals	⋮
☒	Households without Children	200783	Vacant		Not Accepting Referrals	⋮
☒	Households without Children	200784	Vacant		Not Accepting Referrals	⋮
☒	Households without Children	200785	Vacant		Not Accepting Referrals	⋮
☐	Households without Children	200786	Occupied	Shirley Jones	Not Accepting Referrals	⋮

Columns (1) Filter

Configuration

Referral Workflow

Admin Assign Workflow

CE Event Type

Referral to Emergency Shelter bed opening

At the time a unit is marked accepting referrals, then direct entry projects can enroll a household into that unit.

Adding a direct entry client or household into the HMIS project

Once the unit/s have been marked accepting referrals, the user may search for and begin to enter the client or household in their HMIS project.

Next, select the Enrollments section on the right-hand side.

Allegheny County HMIS - Training

Clients Projects

Project Street Outreach Training

Street Outreach Training

Project Type Street Outreach

Organization Training Organization

Project ID 82e7da..

Organization ID 7ee030..

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Project Name

Project Name	Description	Contact Information
Street Outreach Training	Data not collected	Data not collected

Operating Period

Start Date	End Date
08/29/2023	08/23/2050

Project Details

Project Type Street Outreach

Target Population NA: Not applicable

HOPWA Assisted Living Facility Non-HOPWA Funded Project

Continuum Project Yes

Direct Entry Yes



On the Enrollments screen, click the *Add Enrollment* button on the top right:

Allegheny County HMIS - Training

Clients Projects Search Training Provider

Project Close Street Outreach Training Enrollments

Street Outreach Training

Project Type
Street Outreach

Organization
[Training Organization](#)

Project ID 82e7da...
Organization ID 7ee030...

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Enrollments

+ Add Enrollment

View enrollments by
Households Clients

Search Clients
Search by name, DOB, SSN, Personal ID, or MCI ID

Displaying 3 of 3 records Filters (1) Sort

Clients	Relationship to HoH	Status	Enrollment Period	Household ID
HoH Jared Tester (23)	Self (HoH)	Incomplete	08/30/2023 - Ongoing	7bd97c (1)
HoH Rickie Vasquez (29)	Self (HoH)	Open	09/01/2023 - Ongoing	f6ff89 (1)
HoH Mary Richards (43)	Self (HoH)	Open	08/30/2023 - Ongoing	8fc14d (1)

Type the client's name into the search bar and click the *Search* button:

← Back to Project Enrollments

Client Search

Search Clients

Search by name, DOB (mm/dd/yyyy), SSN (xxx-yy-zzzz), Warehouse ID, Personal ID, or MCI ID.

Lettuce Search

Search Results: Selecting an existing record

To work with a client who has an existing match, click the *Enroll Client* button next to the search result.

To view their HMIS record, you can select their hyperlinked name. To view their Clientview record, select the hyperlinked MCI ID.



Client Search

Search Clients

Search by name, DOB (mm/dd/yyyy), SSN (xxx-yy-zzzz), Warehouse ID, Personal ID, or MCI ID.

Displaying 3 of 3 records Filters Sort

MCI ID	Name	SSN	DOB	
1001154909	Logan Lettuce		Hidden (0)	Enroll Client
1001155019	Linda Lettuce		Hidden (33)	Enroll Client
1001155020	Lee Lettuce		Hidden (2)	Enroll Client

In the Enroll pop-up, the Entry Date will populate with the current date. **This date can be back-dated to reflect the actual date the client began working with the project.**

Select the unit the client will be in; DHS uses this to track capacity even for non-housing projects. Click *Enroll*.

Enroll Linda Lettuce

Entry Date *(Required)*

Relationship to HoH *(Required)*

Unit *(Required)*

After clicking the Enroll button, you can select the client's name under the Current Household section to complete the intake.

The client's intake assessment must be submitted in order for them to be considered actively enrolled in the program. Please see the job aid on intake assessments for further information.



Allegheny County HMIS - Training

Project Close [Street Outreach Training](#) > [Enrollments](#) > Add Enrollment

Street Outreach Training

Project Type
Street Outreach

Organization
[Training Organization](#)

Project ID: 82e7da...

Organization ID: 7ee030...

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Enroll Household in Street Outreach Training

Current Household

Name	Enrollment Period	DOB	HoH	Relationship to HoH	Assigned Units (1)
HoH Linda Lettuce	09/25/2023 - Incomplete	Hidden (33)	HoH	Self (HoH)	Street Outreach Capacity (ID: 55)

[← Back to Project Enrollments](#)

Client Search

Search Clients

Search by name, DOB (mm/dd/yyyy), SSN (ssn-yy-zzzz), Warehouse ID, Personal ID, or MCI ID.

Displaying 3 of 3 records Filters Sort

MCI ID	Name	SSN	DOB	
1001154909	Logan Lettuce	Hidden (0)	Hidden (0)	Add to Household
1001155019	Linda Lettuce	Hidden (33)	Hidden (33)	Added
1001155020	Lee Lettuce	Hidden (2)	Hidden (2)	Add to Household

At this step, you can also access the client's incomplete enrollment under the Enrollments section to submit their intake. The client's intake assessment must be submitted in order for them to be considered actively enrolled in the program. Please see the job aid on intake assessments for further information.

Allegheny County HMIS - Training

Project Close [Street Outreach Training](#) > [Enrollments](#) > Add Enrollment

Street Outreach Training

Project Type
Street Outreach

Organization
[Training Organization](#)

Project ID: 82e7da...

Organization ID: 7ee030...

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Enroll Household in Street Outreach Training

Current Household

Name	Enrollment Period	DOB	HoH	Relationship to HoH	Assigned Units (1)
HoH Linda Lettuce	09/25/2023 - Incomplete	Hidden (33)	HoH	Self (HoH)	Street Outreach Capacity (ID: 55)

[← Back to Project Enrollments](#)

Client Search

Search Clients

Search by name, DOB (mm/dd/yyyy), SSN (ssn-yy-zzzz), Warehouse ID, Personal ID, or MCI ID.

Displaying 3 of 3 records Filters Sort

MCI ID	Name	SSN	DOB	
1001154909	Logan Lettuce	Hidden (0)	Hidden (0)	Add to Household
1001155019	Linda Lettuce	Hidden (33)	Hidden (33)	Added
1001155020	Lee Lettuce	Hidden (2)	Hidden (2)	Add to Household



Allegheny County HMIS - Training

Project Close [Street Outreach Training](#) > Enrollments

Street Outreach Training

Project Type
Street Outreach

Organization
[Training Organization](#)

Project ID 82e7da...

Organization ID 7ee030...

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Enrollments + Add Enrollment

View enrollments by Households Clients Search Clients
Search by name, DOB, SSN, Personal ID, or MCI ID

Displaying 4 of 4 records Filters (1) Sort

Clients	Relationship to HoH	Status	Enrollment Period	Household ID
HoH Linda Lettuce (33)	Self (HoH)	Incomplete	09/25/2023 - Ongoing	fc38e (1)
HoH Jared Tester (23)	Self (HoH)	Incomplete	08/30/2023 - Ongoing	7bd97c (1)
HoH Rickie Vasquez (29)	Self (HoH)	Open	09/01/2023 - Ongoing	f6ff89 (1)
HoH Mary Richards (43)	Self (HoH)	Open	08/30/2023 - Ongoing	8fc14d (1)

Search Results: Creating a New Record

If the client search results yielded no results, or results that do match meet the threshold for the client data you have available, you can create a new client.

Under the Client Search section, click the *Add New Client* button:

Client Search

Search Clients

Search

Search by name, DOB (mm/dd/yyyy), SSN (xxx-yy-zzzz), Warehouse ID, Personal ID, or MCI ID.

Displaying 0 of 0 records Filters Sort

MCI ID	Name	SSN	DOB
No data			

+ Add New Client

In the Enroll New Client pop-up, enter the enrollment details and client's demographic information.

Please note: the Entry date will populate with the current date but can be back-dated to reflect the actual date the client began working with the project.



Enroll a New Client



Enrollment Details

Entry Date (Required)

09/25/2023



Relationship to HoH (Required)

Self (HoH)

Unit (Required)

Street Outreach Capacity (ID: 53)

A special note for street outreach and night-by-night shelters: You may not be able to verify client demographics at the time of entry. In this case, as much information as can be gathered can be entered. If a name, DOB, and/or SSN cannot be verified or are given as partial/approximate, enter what is given and select the corresponding Data Quality fields as "Partial/Approximate."

Please note that if the Name Data Quality and Date of birth Data Quality fields are saved as "partial," "client doesn't know," "client prefers not to answer," or "data not collected," **an MCI ID search cannot be done.** MCI is the Master Client Index ID that DHS uses to associate client records for service history and in Clientview. Program involvement for clients without MCI IDs associated will not populate into Clientview and the data warehouse, , but clients can still be enrolled into the street outreach or night-by-night project in HMIS.

Enter the client's name and name data quality. Additional names the client uses can be added by clicking the *Add Name* button.

Name

First Name

Lauren

Middle Name

Last Name

Limberger

Suffix

☒ Client's Primary Name

Name Data Quality

Full name

Notes

[Delete name](#)

+ Add Name



Enter the client's DOB, DOB data quality, SSN and SSN data quality. **Please note: SSN can be entered in full, partially (last 4 digits), or as many digits as are available to you.**

Identification

Date of Birth

DOB Data Quality

Full DOB

Social Security Number

- -

SSN Data Quality

Full SSN

Under Demographics, select the client's Race & Ethnicity; this is a multiselect field and as many options as needed can be selected. The selected options should indicate how the client identifies themselves. Additional Race & Ethnicity detail can be added in the Corresponding text box.

Please note that if Client doesn't know, Client prefers not to answer, or Data not collected are selected, no other options can be chosen at the same time.

Demographics

Race and Ethnicity

Select Race and Ethnicity

American Indian, Alaska Native, or Indigenous

Asian or Asian American

Black, African American, or African

Hispanic/Latina/e/o

Middle Eastern or North African

Native Hawaiian or Pacific Islander

White

Client prefers not to answer

Client doesn't know

Data not collected

Select the client's Gender; this is a multiselect field and as many options as needed can be selected. The selected options should indicate how the client identifies themselves. If Different Identity is selected, there is a dependent text box that becomes mandatory.



Please note that if Client doesn't know, Client prefers not to answer, or Data not collected are selected, no other options can be chosen at the same time.

Gender

Select Gender

- Man
- Woman
- Transgender
- Non-Binary
- Questioning
- Culturally Specific Identity (e.g., Two-Spirit)
- Different Identity
- Client prefers not to answer
- Client doesn't know
- Data not collected

Gender

Different Identity X Woman X

If different identity, please specify

Example text here

Select the client's Sex; this field is not a multi-select.

Sex

Select Sex

- Female
- Male
- Client prefers not to answer
- Client doesn't know
- Data not collected

You can select the client's preferred pronouns as well as their veteran status.



Demographics

Race and Ethnicity

Black, African American, or African White

Additional Race and Ethnicity Detail

Gender

Different Identity Woman

If different identity, please specify

Example text here

Pronouns

she/her they/them

Veteran Status

No

In the Contact Information section, you can click the Add Address, Add Phone, and Add email buttons to add contact information for the client; multiple options for each can be saved.

Contact Information

+ Add address

+ Add phone

+ Add email

Enter address/es and notes:

Contact Information

Address

Address Line 1

547 Greenfield Avenue

Address Line 2

District (County)

City

pittsburgh

State

PA

Zip

15207

Address Type

Physical

Notes

Address notes here

[Delete address](#)



Enter phone number/s and notes:

Phone

Phone Number (412) 111-1	Notes Phone notes here
Phone Type Mobile ✕	

[Delete phone](#)

Enter email address/es and notes:

Email

Email lauren@email.com	Notes email notes
--	---

[Delete email](#)

[+ Add email](#)

MCI ID- Creating a new client

To search through MCI, Under the MCI ID section click the *Search for MCI ID* button:

MCI ID

MCI Search Available

Based on the information provided above, MCI search is available for this client.

If there are no potential matches, click the *Create and Enroll Client* button.



MCI ID

No Matches Found

A new MCI ID will be created for this client.

☐

New MCI ID

Cancel

Create & Enroll Client

At this step, you can also access the client's incomplete enrollment under the Enrollments section, or by clicking their hyperlinked name under the Current Household section that is displaying on the screen, to submit their intake. The client's intake assessment must be submitted in order for them to be considered actively enrolled in the program. Please see the job aid on intake assessments for further information.

The client's intake assessment must be submitted in order for them to be considered actively enrolled in the program. Please see the job aid on intake assessments for further information.

Allegheny County HMIS - Training

Project Close [Street Outreach Training](#) > [Enrollments](#) > Add Enrollment

Street Outreach Training

Project Type
Street Outreach

Organization
[Training Organization](#)

Project ID 82475a. 🔗

Organization ID 7ee030. 🔗

Overview

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Enroll Household in Street Outreach Training

Current Household

Name	Enrollment Period	DOB	HoH	Relationship to HoH	Assigned Units (1)
HoH Linda Lettuce	09/25/2023 - Incomplete	🔗 Hidden (33)	☒ HoH	Self (HoH)	Street Outreach Capacity (ID: 55)

← Back to Project Enrollments

Client Search

Search Clients

🔍 Search + Add New Client

Search by name, DOB (mm/dd/yyyy), SSN (xxx-xx-xxxx), Warehouse ID, Personal ID, or MCI ID.

Displaying 3 of 3 records 🔼 Filters ⬇️ Sort

MCI ID	Name	SSN	DOB	
1001154909 🔗	Loren Lettuce	🔗 Hidden (0)	🔗 Hidden (0)	Add to Household
1001155019 🔗	Linda Lettuce	🔗 Hidden (33)	🔗 Hidden (33)	Added
1001155020 🔗	Lee Lettuce	🔗 Hidden (2)	🔗 Hidden (2)	Add to Household

9/2025

DIRECT ENTRY INTO HMIS— HMIS JOB AID

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MCI ID- Possible Matches displaying in the Enroll A New Client pop-up

If potential matches display after the Enroll a New Client pop-up is completed, please make note of the MCI ID displaying for the client.

MCI ID

(1) Possible MCI ID Match Found

This client was matched with an MCI ID. You will need to confirm whether a correct match was found.

1 Match Found

☐	91% match confidence 1001154898 Already in HMIS	Olivia Orange Age: 33 DOB: 01/01/1990
☐	New MCI ID	

Navigate back to the Enrollment screen. Click the *Add Enrollment* button:

Allegheny County HMIS - Training

Clients Projects Admin

object Close Street Outreach Training > Enrollments

Street Outreach Training

project Type street Outreach

organization [Training Organization](#)

project ID 8267da... ()

organization ID 7ee030... ()

Overview

Enrollments

services

Enrollments

View enrollments by Households Clients

Search Clients

Search by name, DOB, SSN, Personal ID, or MCI ID

Displaying 5 of 5 records

Filters (1) Sort

Clients	Relationship to HoH	Status	Enrollment Period	Household ID
HoH Bonnie Brice (33)	Self (HoH)	Incomplete	09/26/2023 - Ongoing	47e1a2 (1)

Enter the client's MCI ID that was shown as a possible match and click the search button:

Client Search

Search Clients

1001154898

Search

Search by name, DOB (mm/dd/yyyy), SSN (xxx-yy-zzzz), Warehouse ID, Personal ID, or MCI ID.

Click the *Enroll Client* button and proceed with completing and submitting the intake assessment as shown previously in this job aid:



Client Search

Search Clients

Search by name, DOB (mm/dd/yyyy), SSN (xxx-yy-zzzz), Warehouse ID, Personal ID, or MCI ID.

Displaying 1 of 1 records Filters Sort

MCI ID	Name	SSN	DOB
1001154898 ✕	Olivia Orange	Hidden (33)	Enroll Client

MCI ID: Adding additional Household Members

If you are enrolling a household of more than one person into the project, after the HOH's MCI/client record has either been selected or created, you can search for additional household members one by one to add them to the household for enrollment. You can select any possible matches that appear, or create a new client:

Current Household

Name	Enrollment Period	DOB	HoH	Relationship to HoH	Assigned Units (1)
HoH Daria Morgendorffer	09/01/2023 - Active	Hidden (32)	☒ HoH	Self (HoH)	Households without Children (ID: 72) Remove

[← Back to Enrollment](#)

Client Search

Search Clients

Search by name, DOB (mm/dd/yyyy), SSN (xxx-yy-zzzz), Warehouse ID, Personal ID, or MCI ID.

Displaying 0 of 0 records Filters Sort

MCI ID	Name	SSN	DOB
No data			

MCI ID: Not enough information to clear MCI

A special note for street outreach and night-by-night shelters: You may not be able to verify client demographics at the time of entry. In this case, as much information as can be gathered can be entered. If a name, DOB, and/or SSN cannot be verified or are given as partial/approximate, enter what is given and select the corresponding Data Quality fields as "Partial/Approximate."



Please note that if the Name Data Quality and Date of birth Data Quality fields are saved as "partial," "client doesn't know," "client prefers not to answer," or "data not collected," **an MCI ID search cannot be done**. MCI is the Master Client Index ID that DHS uses to associate client records for service history and in Clientview. Program involvement for clients without MCI IDs associated will not populate into Clientview and the data warehouse, but clients can still be enrolled into the street outreach or night-by-night project in HMIS.

MCI ID

⚠ Not enough information to clear MCI.

First Name, Last Name, and Date of Birth are required to clear MCI.

Name Data Quality and DOB Data Quality must also be complete.

Cancel Create & Enroll Client

If you are enrolling a client without enough information to search for an MCI ID match, you will receive a message that there must be a first name, last name, Full name data quality, DOB and Full DOB data quality fields.

To proceed with enrolling an un-cleared client without an MCI ID, select the *Create and Enroll Client* button and proceed with the enrollment and intake.

MCI ID: To search for an MCI ID match for an uncleared client enrolled in a project

If you are able to verify an enrolled client's name, name data quality, DOB and/or DOB data quality while they are enrolled in the street outreach or night-by-night shelter project, you can conduct an MCI search while they are enrolled.

Click the client's name on the Enrollments screen:

Street Outreach Training > Enrollments

Enrollments + Add Enrollment

View enrollments by Households Clients Search Clients

Displaying 6 of 6 records Filters (1) Sort

Clients	Relationship to HOH	Status	Enrollment Period	Household ID
Bonnie Bink (33)	Self (HOH)	Incomplete	09/26/2023 - Ongoing	47e1a2 (1)
Linda Lettuce (33)	Self (HOH)	Incomplete	09/25/2023 - Ongoing	fc388e (1)
Jared Tester (23)	Self (HOH)	Incomplete	08/30/2023 - Ongoing	7bd97c (1)
Rachel Roueffort (33)	Self (HOH)	Open	09/26/2023 - Ongoing	ecb5b0 (1)
Rickie Vaguer (28)	Self (HOH)	Open	09/01/2023 - Ongoing	9f98a (1)
Mary Richards (43)	Self (HOH)	Open	08/30/2023 - Ongoing	8fc14d (1)

On the client's Enrollment overview screen under the Quick Actions section, select the *Update Client Details* button:



Rachel Roquefort > Street Outreach Training

Enrollment Overview

Household		
Name	Relationship to HoH	Status
HoH: Rachel Roquefort	Self (HoH)	Open

Enrollment Details	
Entry / Exit Dates	09/26/2023 - Active
Unit Assignment	Street Outreach Capacity (ID: 140)
Date of Engagement	Data not collected
PATH Status	Data not collected
Has Active Referrals in LINK	No

Household Tasks (0)
 All tasks complete

Quick Actions

Record Service

Update Client Details

In the *Update Client Details* pop-up, update the client's name fields and name data quality to full, as needed; update the client's date of birth and date of birth data quality to full, as needed.

At the bottom of the pop-up, the MCI ID section should display the button *Search for MCI ID*; click the button:

MCI ID

MCI Search Available

Based on the information provided above, MCI search is available for this client.

Search for MCI ID

Cancel

Save Changes

If there are no possible matches, click the *Save Changes* button to create a new MCI ID for the client.

MCI ID

No Matches Found

A new MCI ID will be created for this client.

New MCI ID

Cancel

Save Changes



If possible matches are found, they will display in the results. To select a potential match, toggle the switch to the left of the result and click the *Save Changes* button:

The screenshot shows a web interface for MCI ID management. At the top, it says 'MCI ID' and '(1) Possible MCI ID Match Found'. Below this, a message states: 'This client was matched with an MCI ID. You will need to confirm whether a correct match was found.' Under the heading '1 Match Found', there is a table with two rows. The first row shows a 91% match confidence (indicated by an orange bar), the name 'Ryan Raddichio', age '33', and date of birth '01/01/1990'. To the left of this row is a toggle switch, which is currently off (white). A red box highlights this toggle switch. Below the first row is a second row labeled 'New MCI ID', which also has a toggle switch, currently off. At the bottom right of the interface, there are two buttons: 'Cancel' and 'Save Changes'. A red arrow points down to the 'Save Changes' button, which is also highlighted with a red box.

Match Confidence	Client Information	Action
91% match confidence	Ryan Raddichio Age: 33 DOB: 01/01/1990	☐
New MCI ID		☐

Cancel Save Changes

If the possible MCI ID match has a match confidence threshold under 95%, you will also see the option to create a new MCI ID if the results do not display the client whose information you entered. In this scenario, you can toggle the switch next to the New MCI ID row and click Save Changes to create a new MCI ID for this client.

For more information...

For assistance, please contact the Allegheny County Service Desk at dhs-servicedesk@alleghenycounty.us or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access Service Desk Plus, go to: <https://dhs-servicedesk.alleghenycounty.us/>