Direct Entry into HMIS v2– HMIS Job Aid

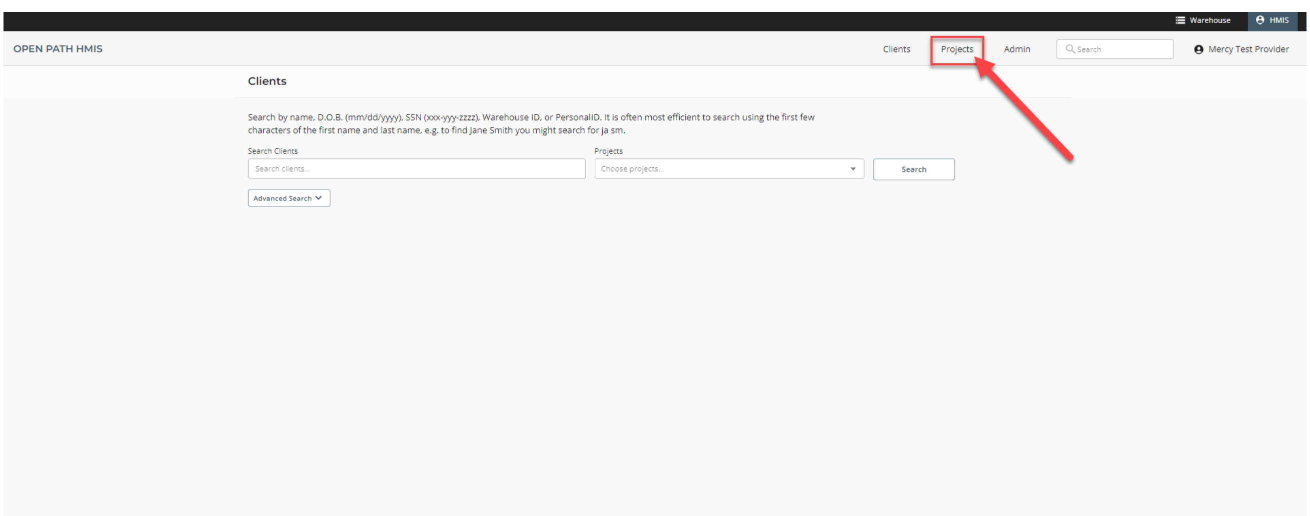
This job aid will demonstrate how to enter a direct entry into HMIS. Programs that use direct entry enter their clients directly into HMIS and do not request referrals through Coordinated Entry. This job aid was updated in 2025 to reflect the new Units screen and unit management functionality for direct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

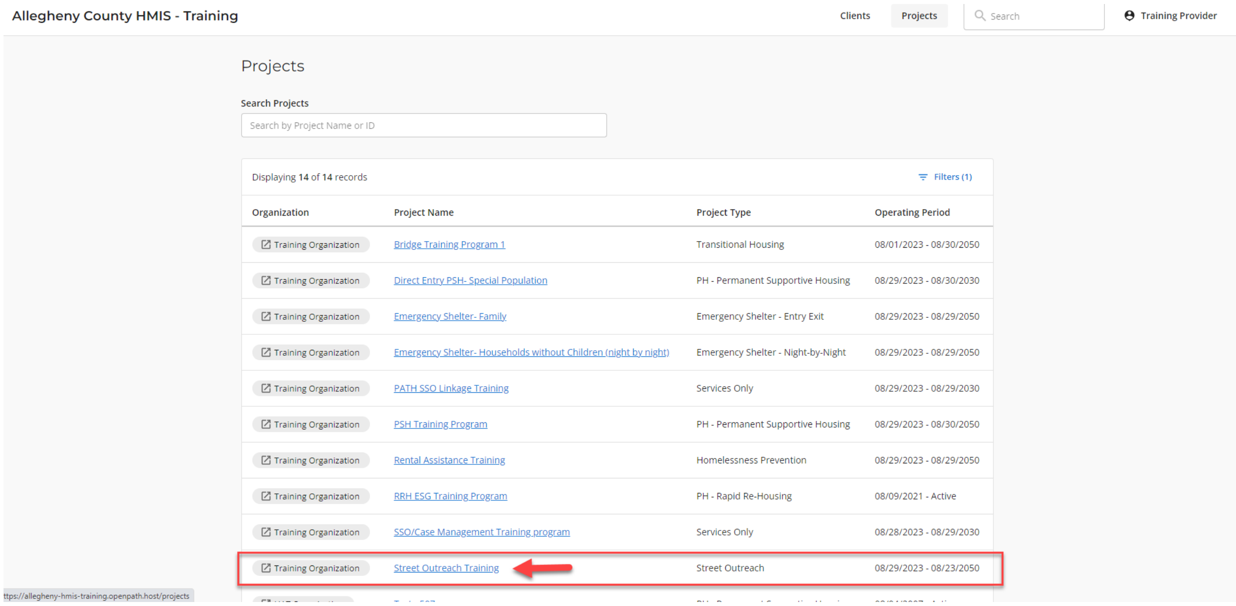
Please note that if the Name Data Quality and Date of birth Data Quality fields are saved as "partial," "client doesn't know," "client prefers not to answer," or "data not collected," an MCI ID search cannot be done. MCI is the Master Client Index ID that DHS uses to associate client records for service 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

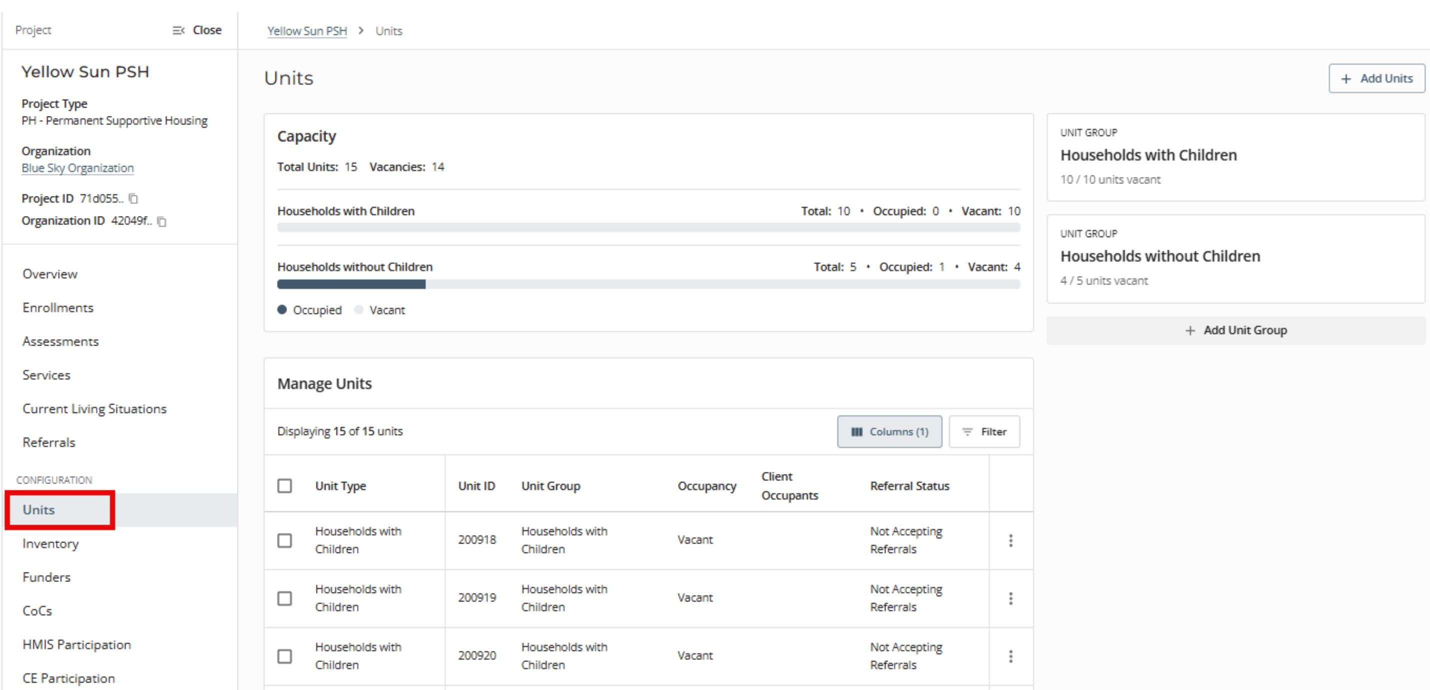
Log into HMIS and select the *Projects* hyperlink on the upper right screen.



Click the name of the project.



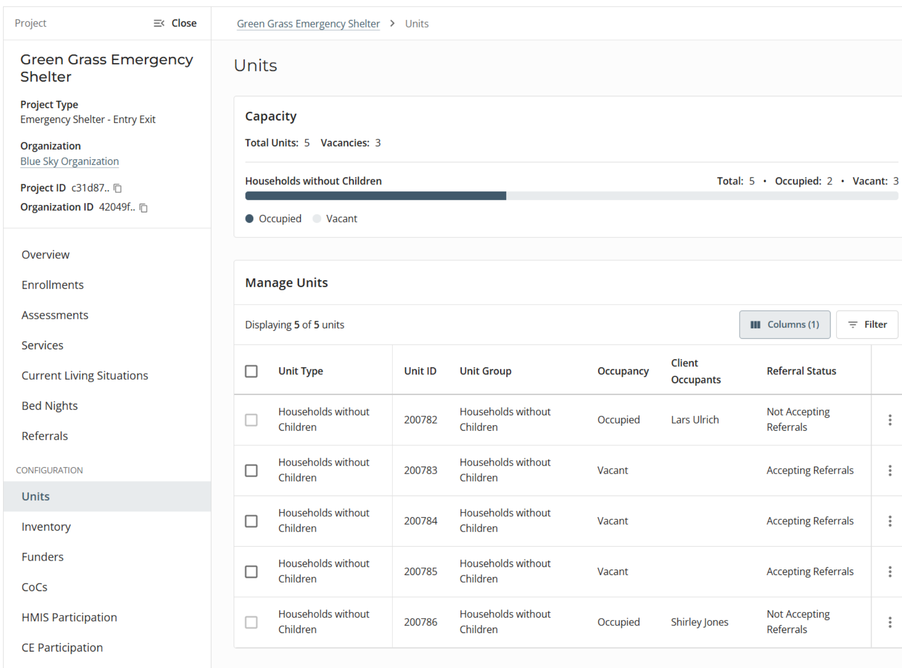
Once the user has selected the project, to navigate to the Units screen, select the *Units* button on the lefthand pane



Units Screen Navigation + Marking a Unit "Accepting Referrals"

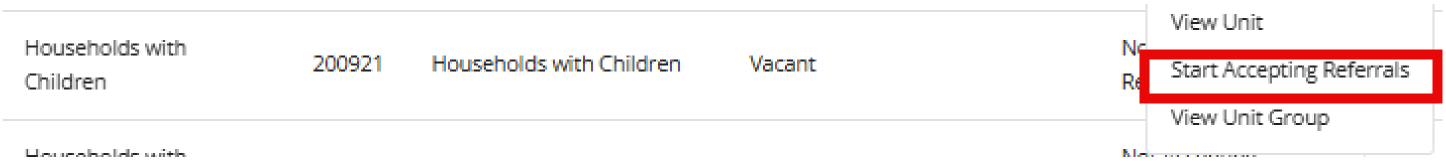
In order to enroll a direct entry client or household, the user must ensure that a unit in the project is open to 'accepting a referral' and must change a vacant unit's status accordingly.

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



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.**

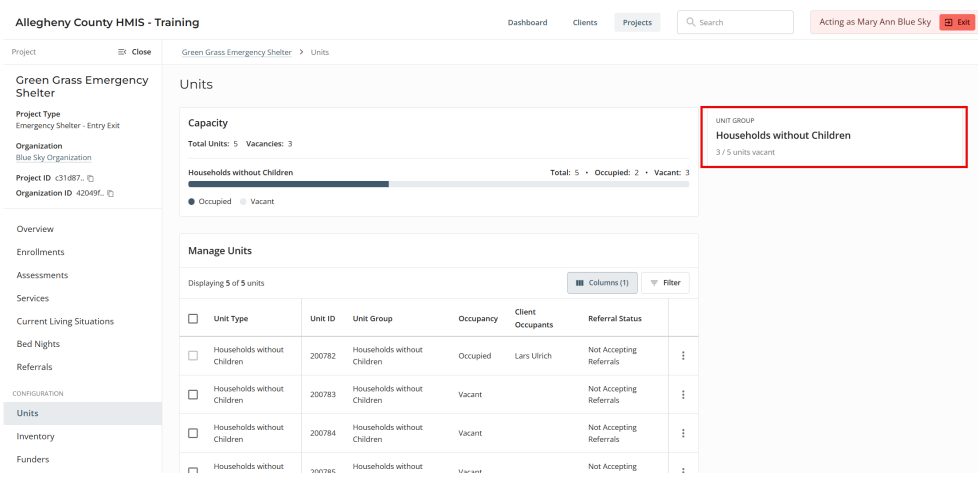
To change a unit's status from "Not Accepting referrals" to "Accepting Referrals," select the unoccupied unit in the grid. Click the three-dot symbol at the right of the row; a small menu will display. Select the option to "Start Accepting referrals".



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.

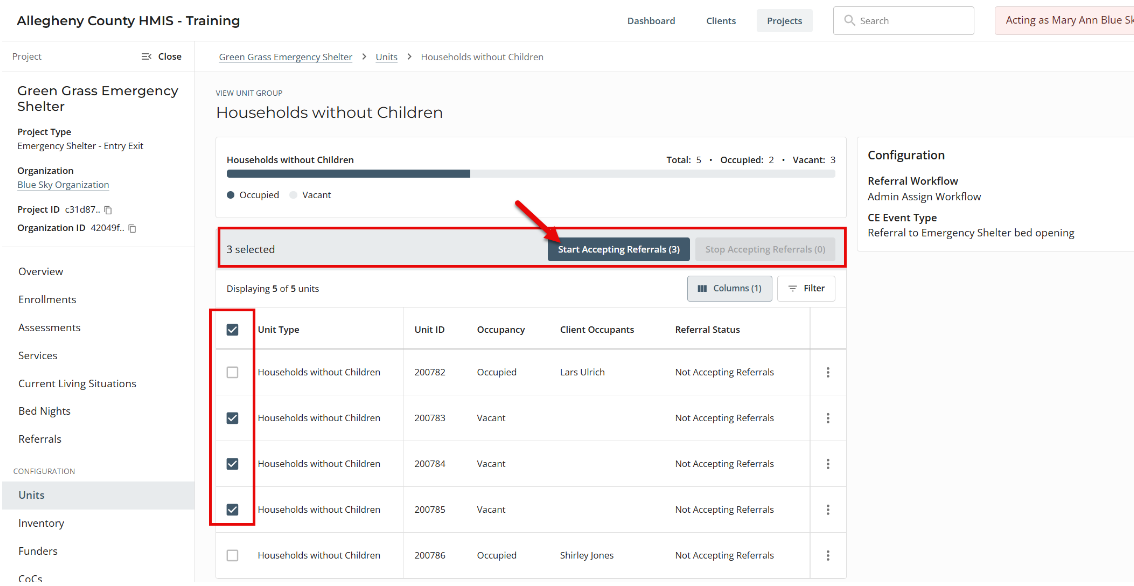
In order to mark units available en masse, users can select the checkbox that displays to the left of each vacant unit on the unit screen.



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.

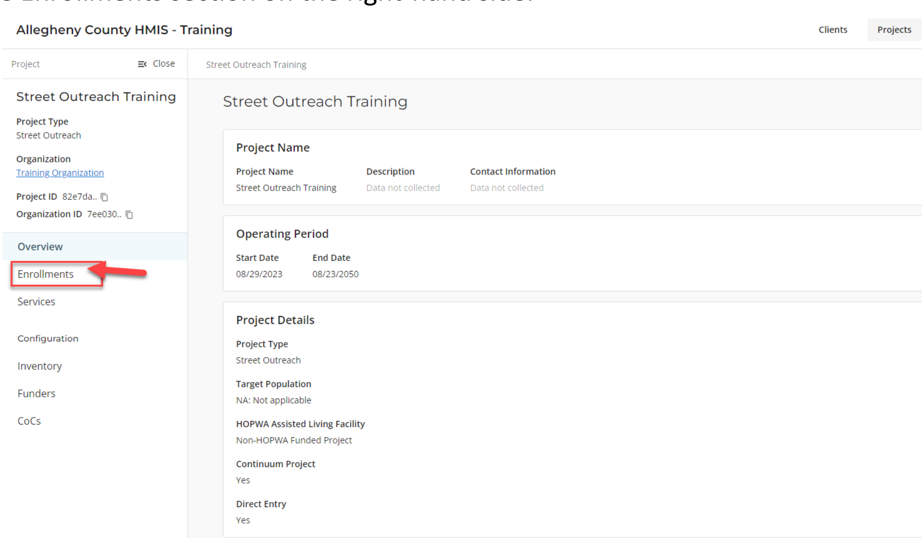


At the time a unit is marked accepting referrals, then direct entry projects can enroll a household into that unit.

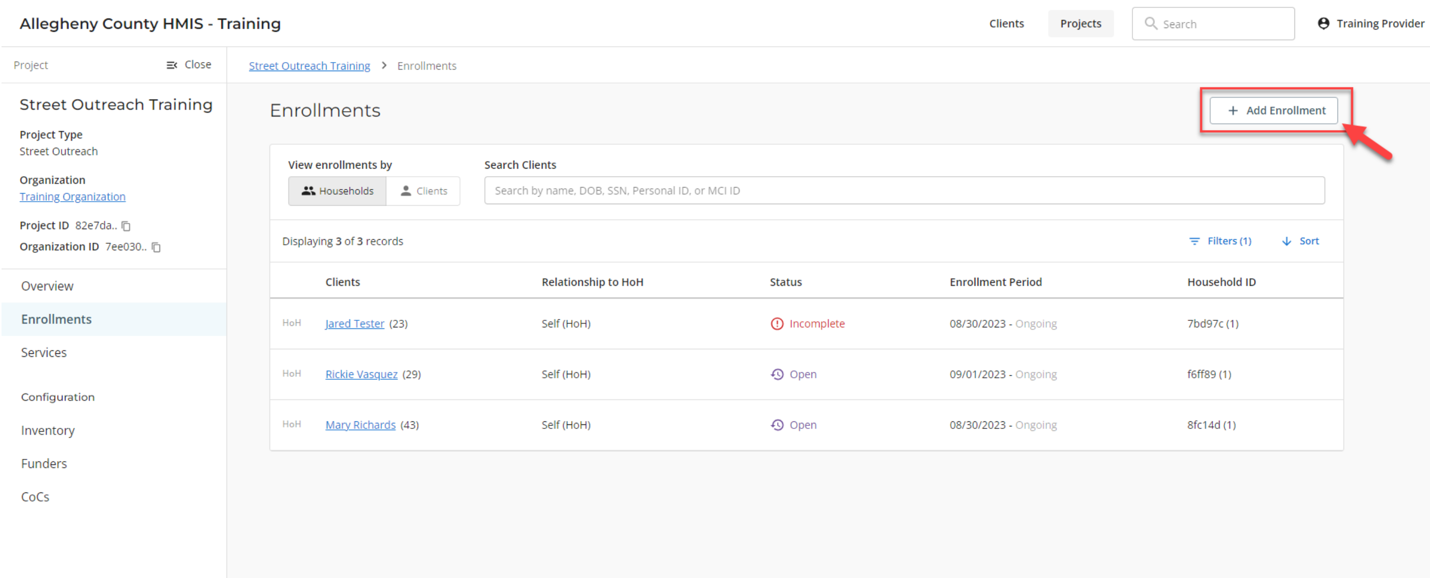
Adding a direct entry client or household into the HMIS project

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.



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

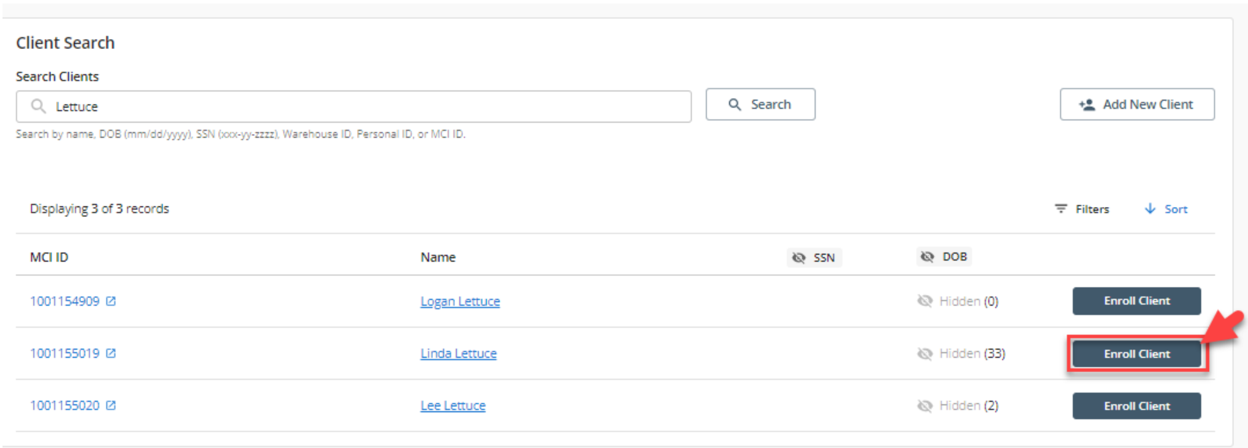


Type the client's name into the search bar and click the *Search* button:

Search Results: Selecting an existing record

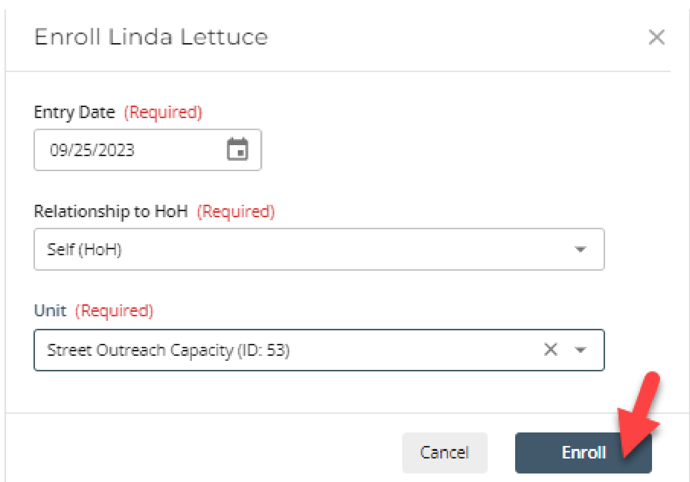
To work with a client who has an existing match, click the *Enroll Client* button next to the search result.

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



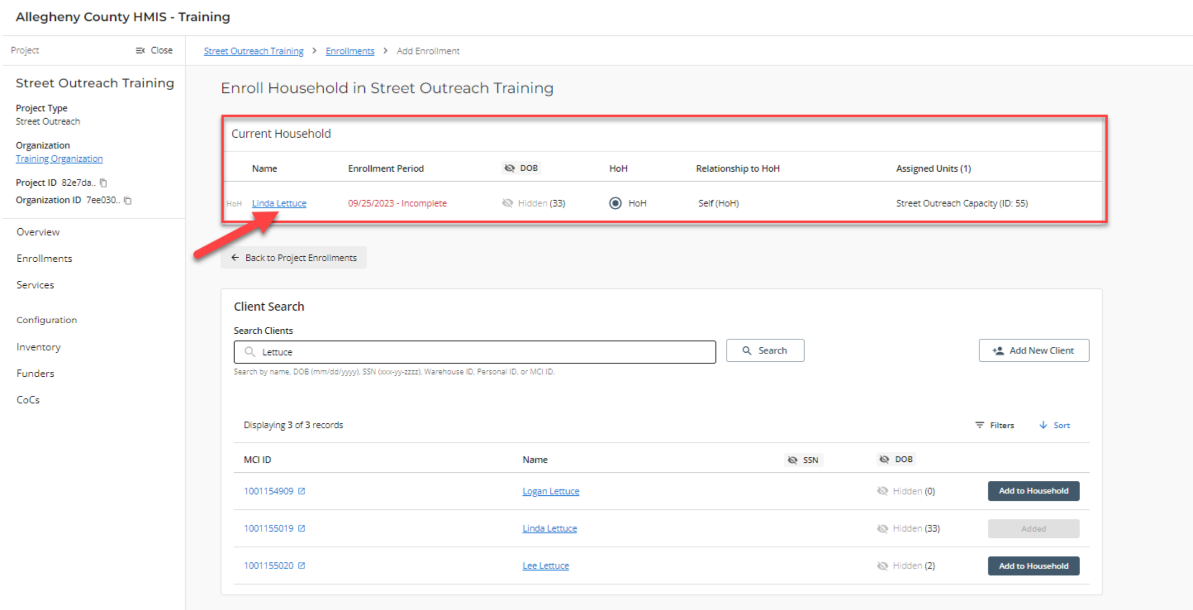
In the Enroll pop-up, the Entry Date will populate with the current date. **This date can be back-dated to reflect the actual date the client began working with the project.**

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

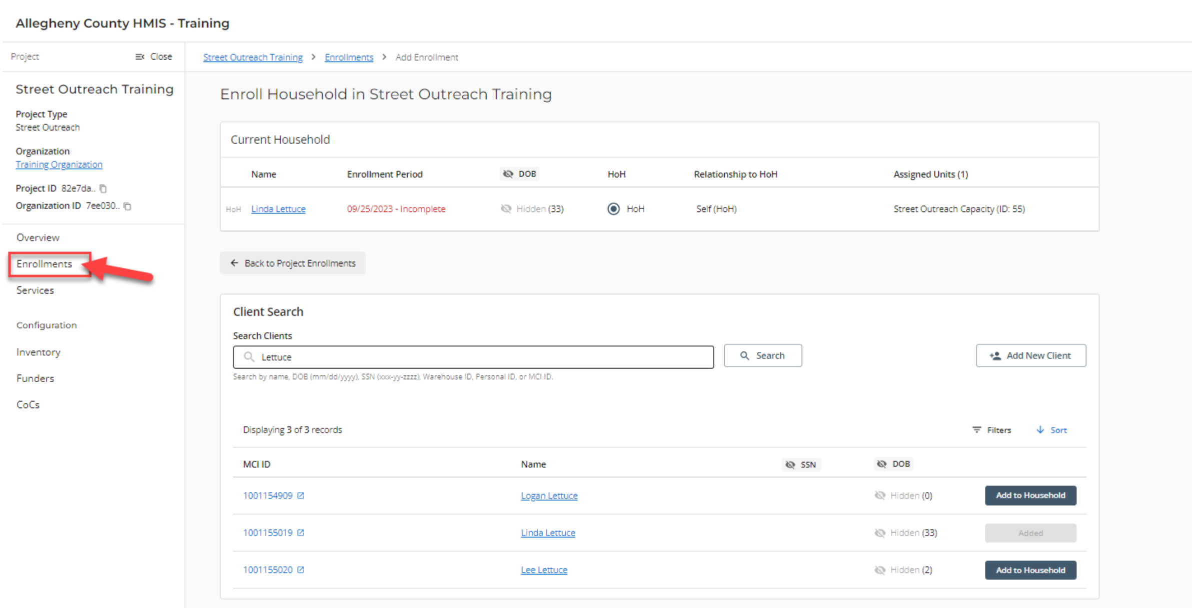


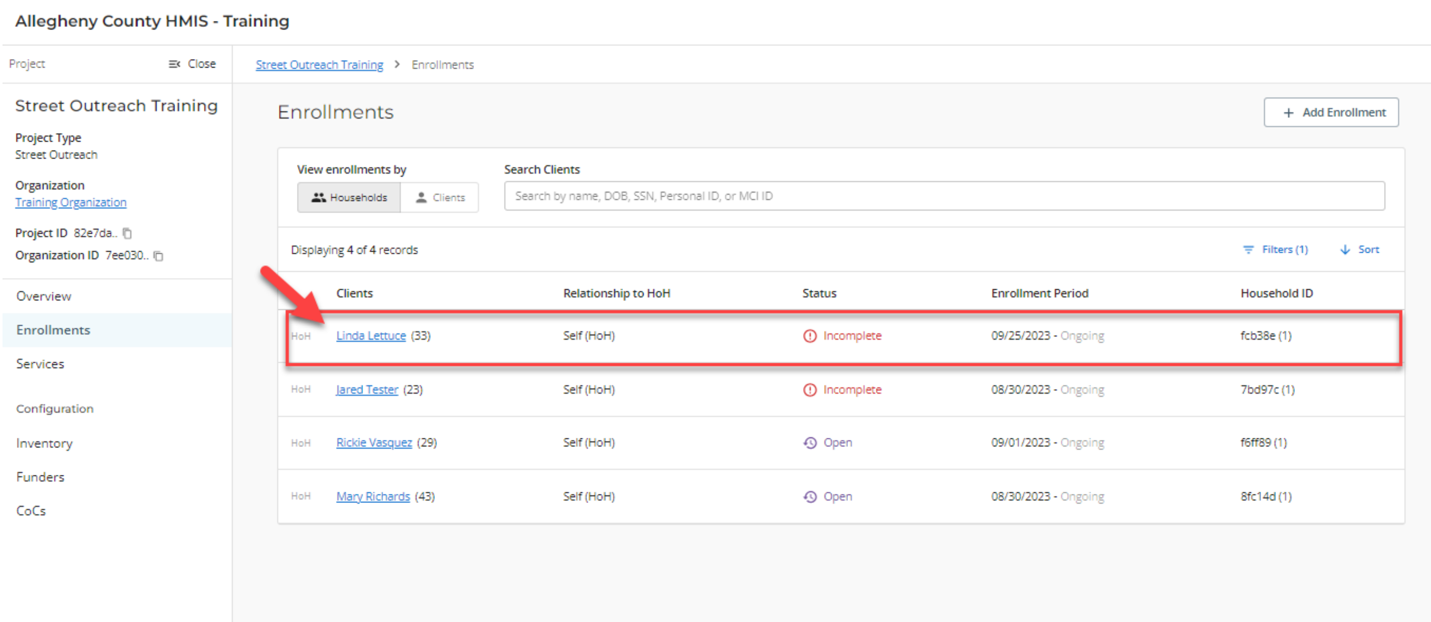
After clicking the Enroll button, you can select the client's name under the Current Household section to complete the intake.

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.



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.

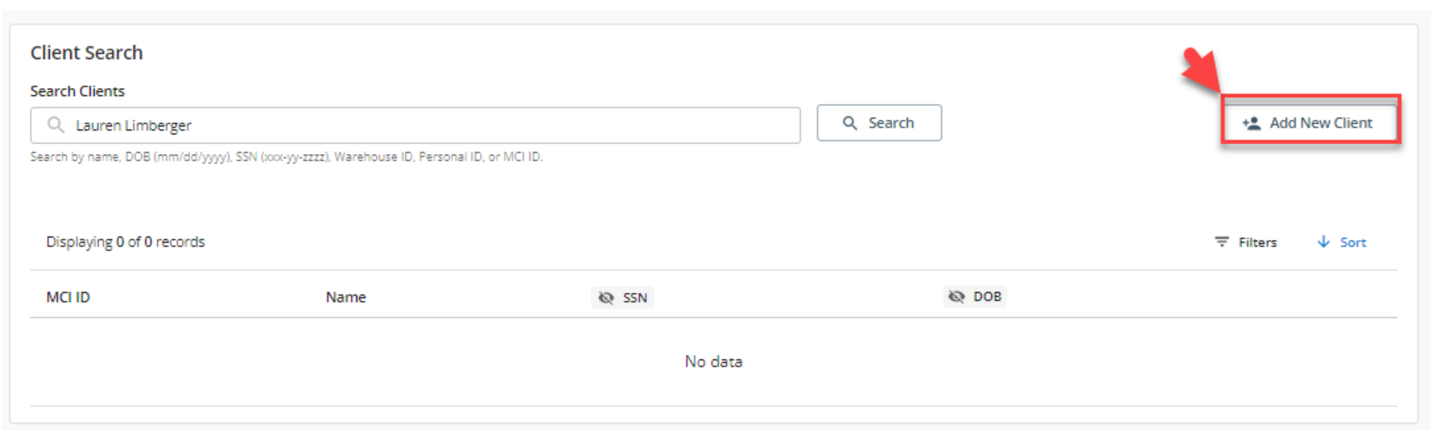




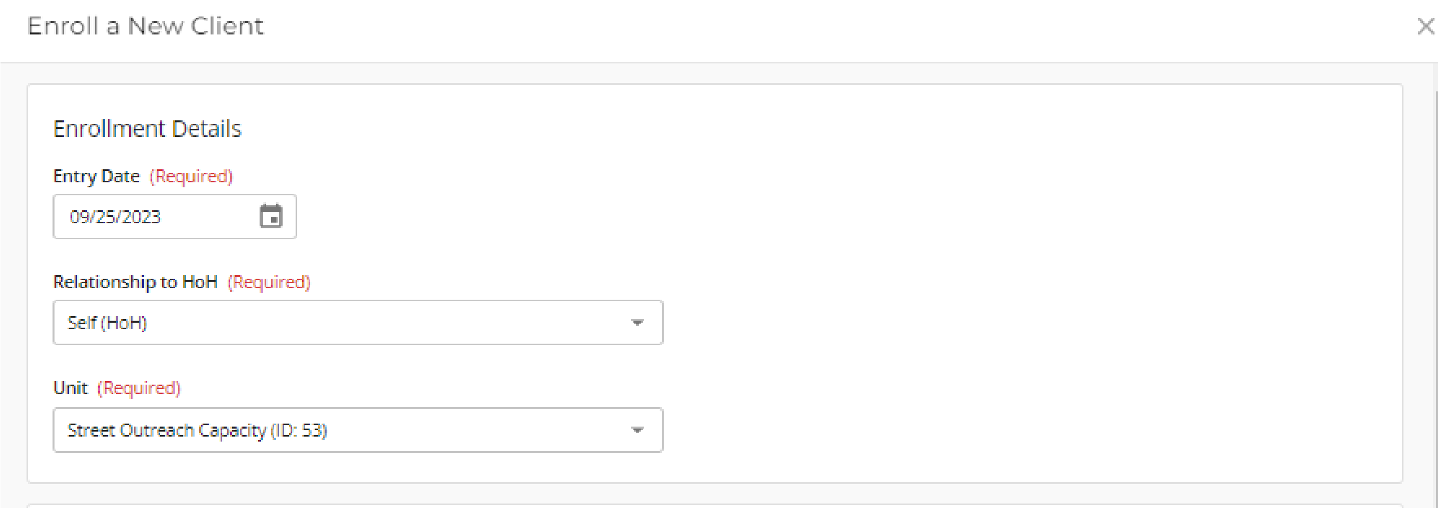
Search Results: Creating a New Record

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:



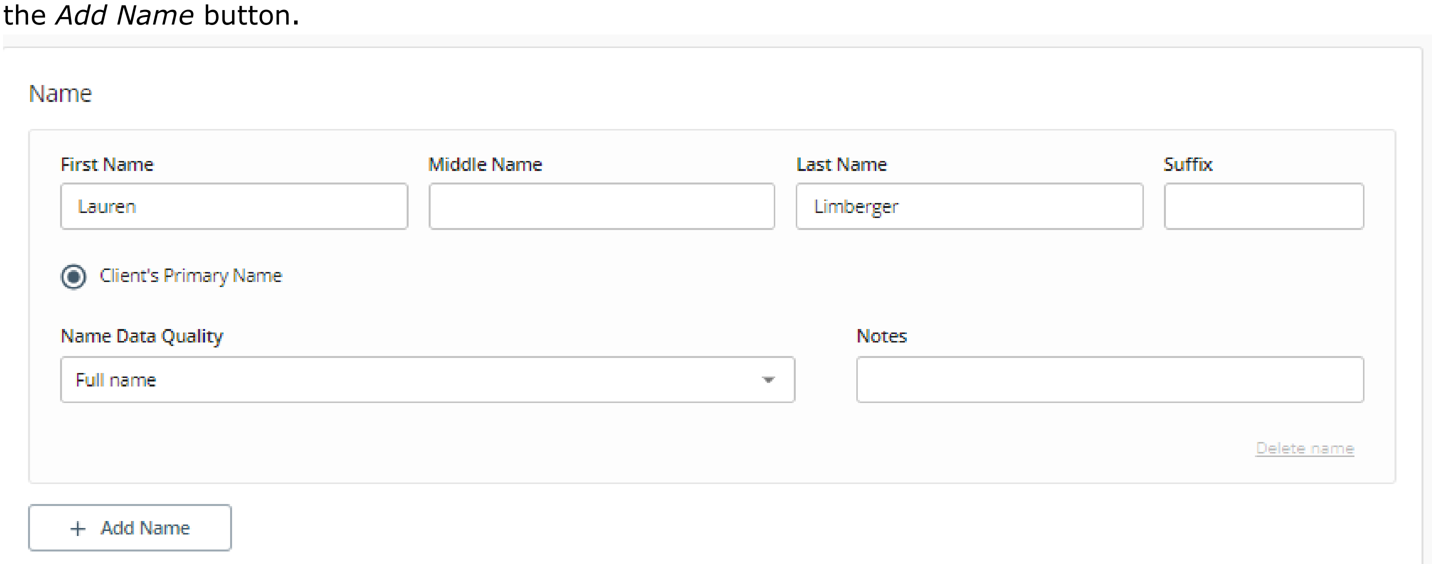
In the Enroll New Client pop-up, enter the enrollment details and client's demographic information. **<u>Please note:</u> the Entry date will populate with the current date but can be back-dated to reflect the actual date the client began working with the project.**



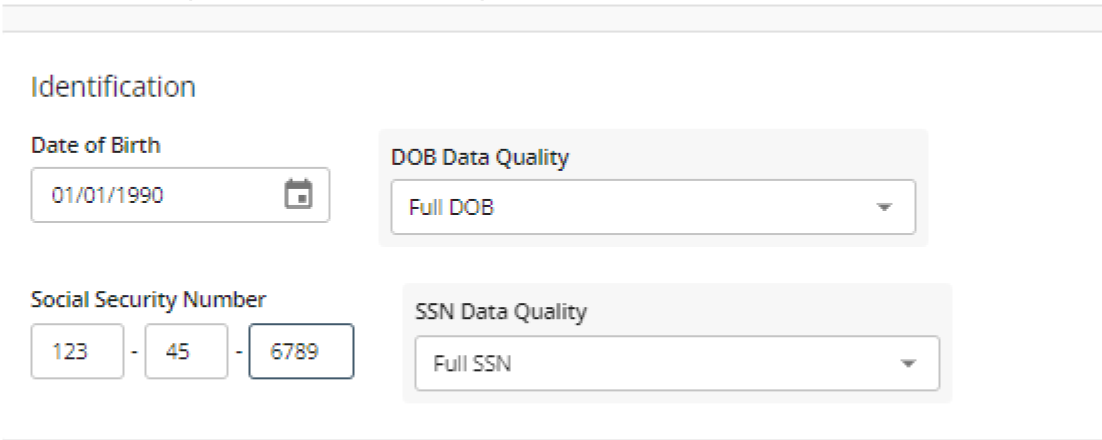
<u>A special note for street outreach and night-by-night shelters:</u> You may not be able to verify client demographics at the time of entry. In this case, as much information as can be gathered can be entered. If a name, DOB, and/or SSN cannot be verified or are given as partial/approximate, enter 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," <u>an MCI ID search cannot be done</u>. 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.

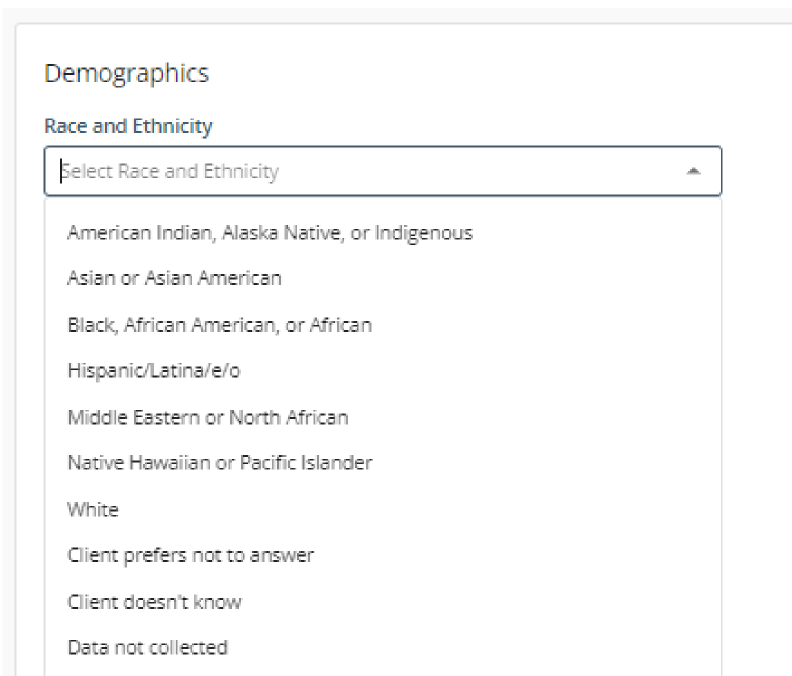


Enter the client's DOB, DOB data quality, SSN and SSN data quality. **<u>Please note:</u> SSN can be entered in full, partially (last 4 digits), or as many digits as are available to you.**



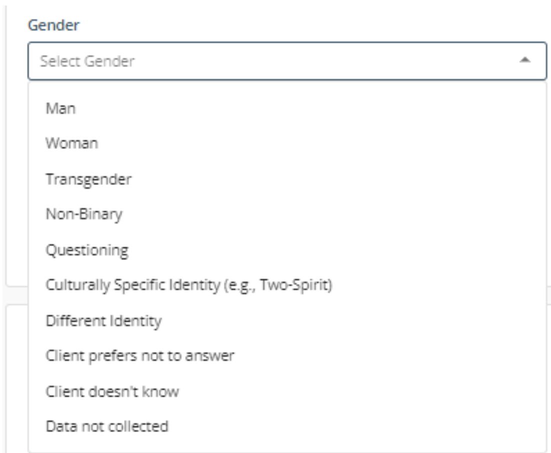
Under Demographics, select the client's Race & Ethnicity; this is a multiselect field and as many options as needed can be selected. The selected options should indicate how the client identifies themselves. Additional Race & Ethnicity detail can be added in the Corresponding text box.

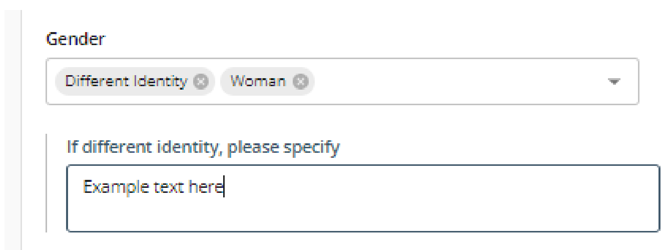
Please note that if Client doesn't know, Client prefers not to answer, or Data not collected are selected, no other options can be chosen at the same time.



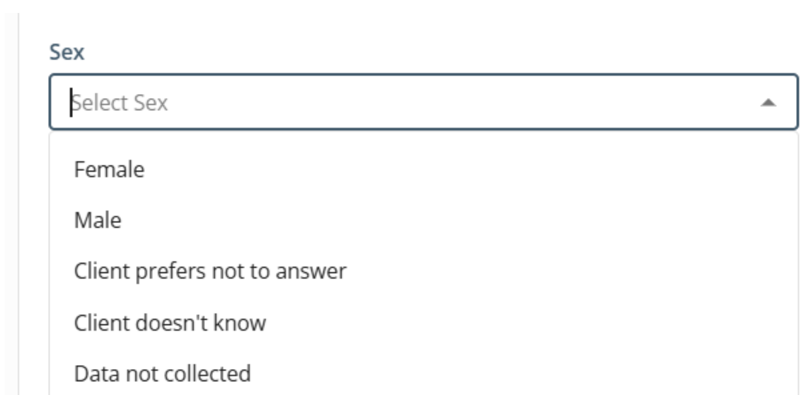
Select the client's Gender; this is a multiselect field and as many options as needed can be selected. The selected options should indicate how the client identifies themselves. If Different Identity is selected, there is a dependent text box that becomes mandatory.

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.

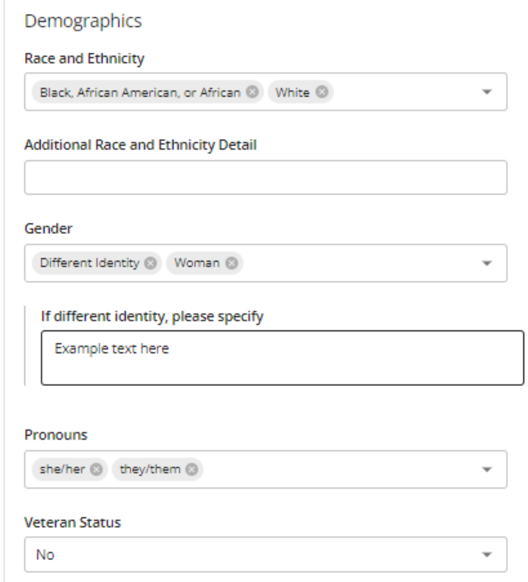




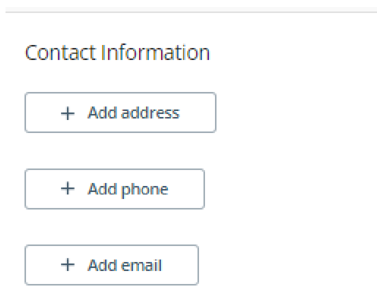
Select the client's Sex; this field is not a multi-select.



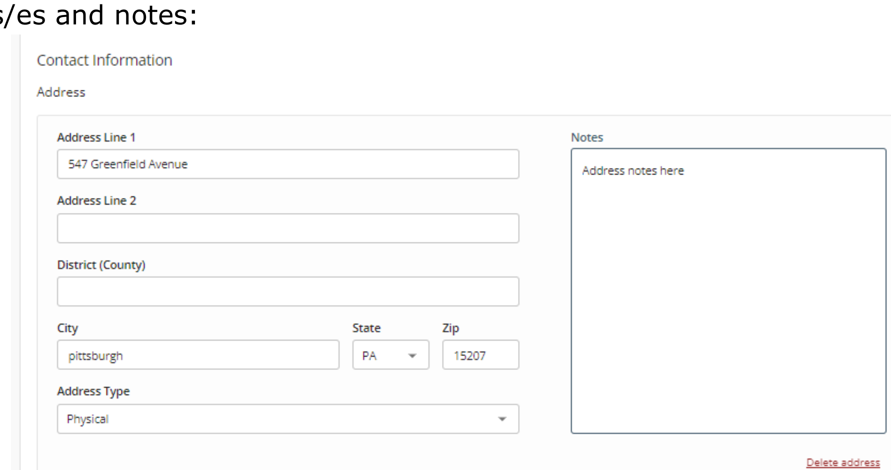
You can select the client's preferred pronouns as well as their veteran status.



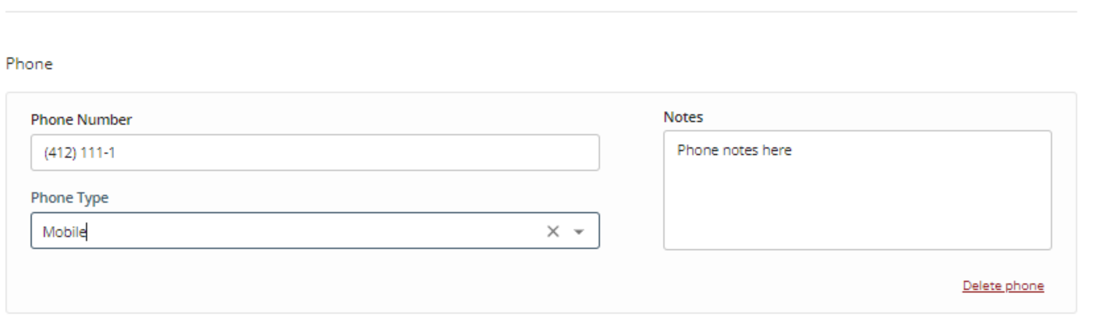
In the Contact Information section, you can click the Add Address, Add Phone, and Add email buttons to add contact information for the client; multiple options for each can be saved.



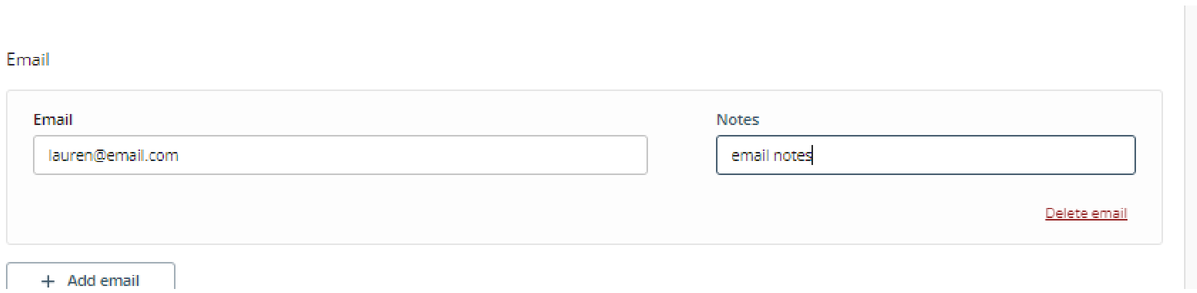
Enter address/es and notes:



Enter phone number/s and notes:

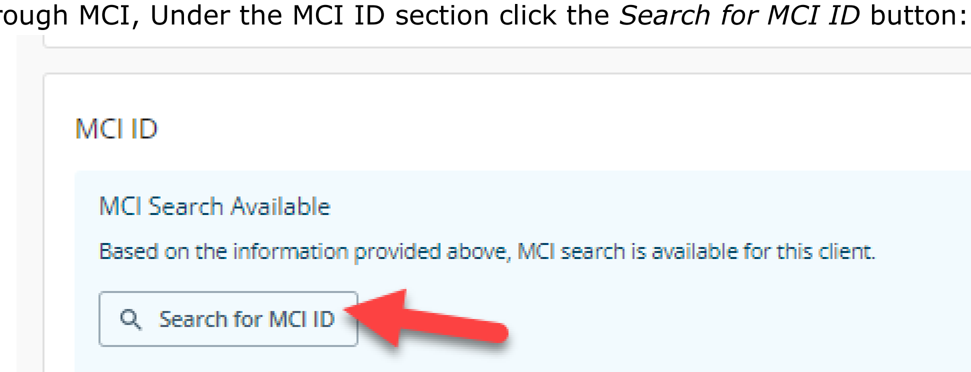


Enter email address/es and notes:

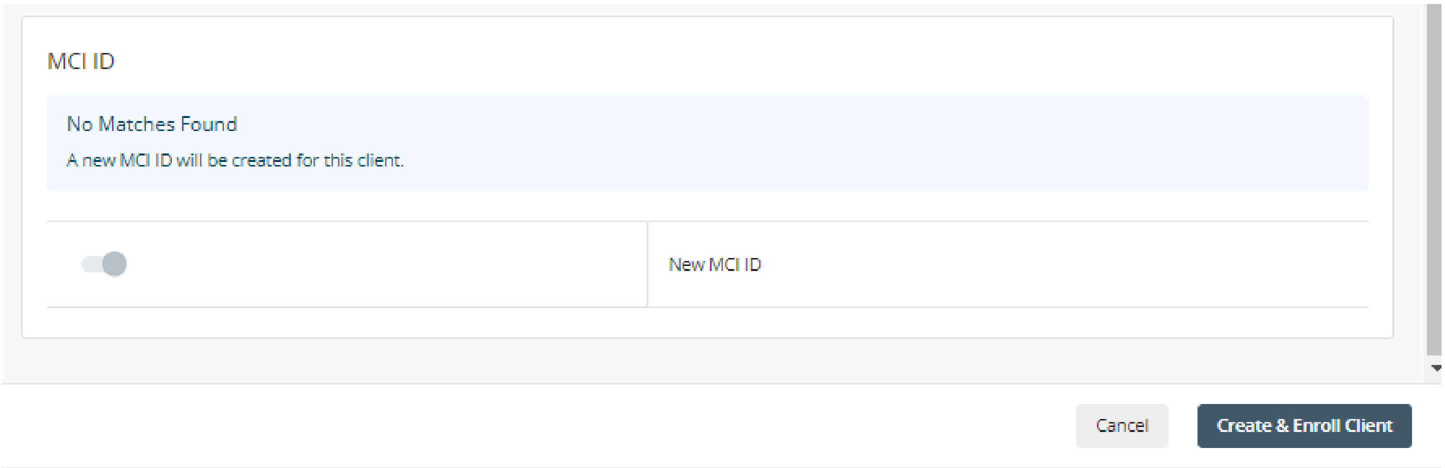


MCI ID- Creating a new client

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



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



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.

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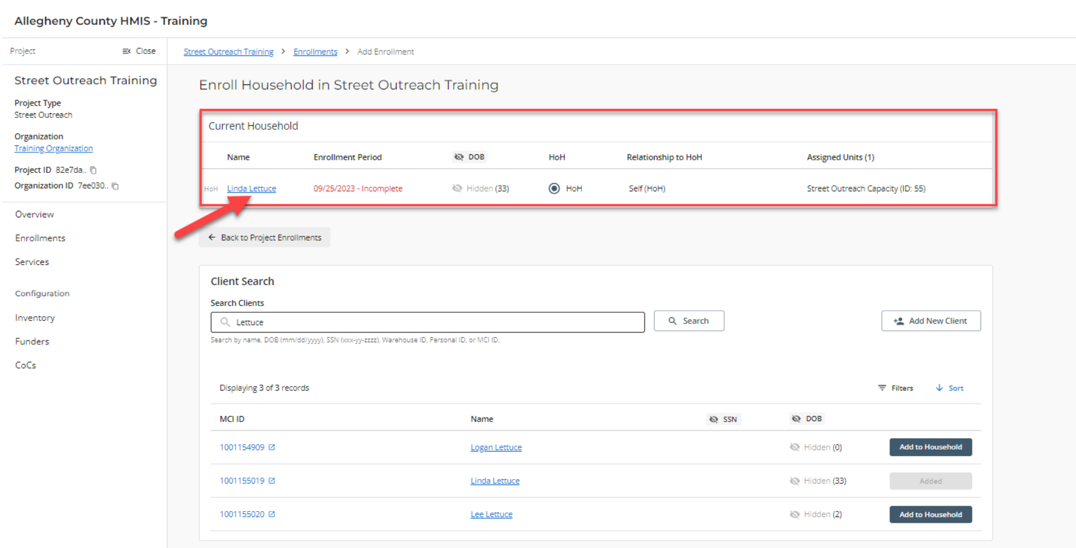
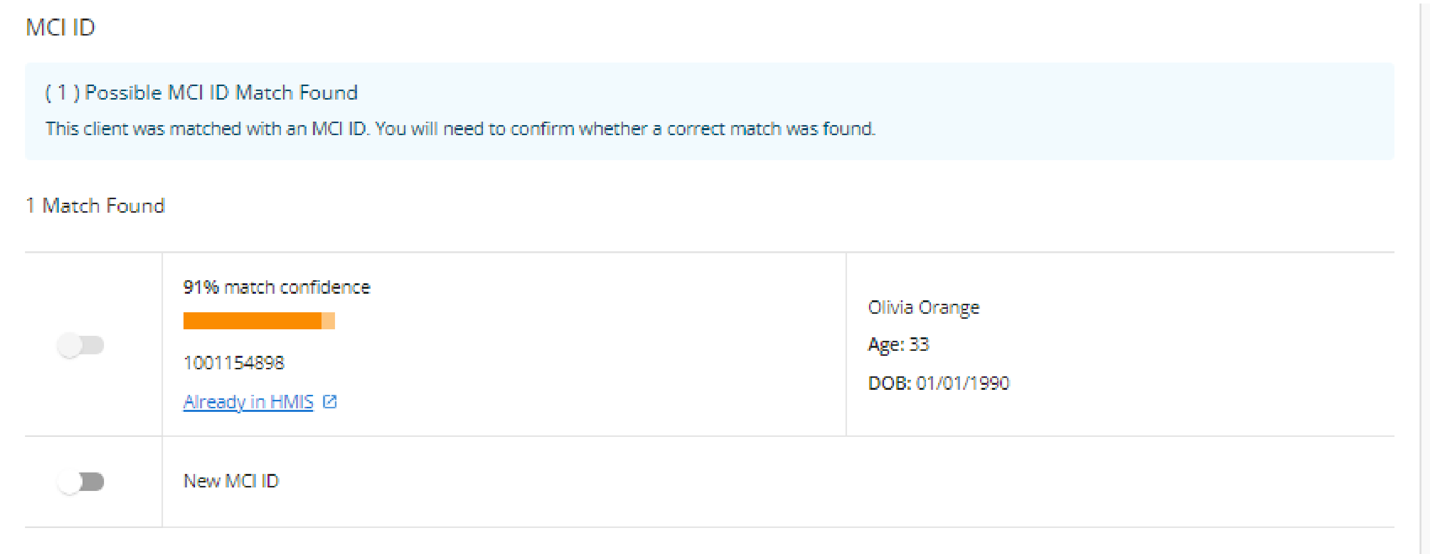
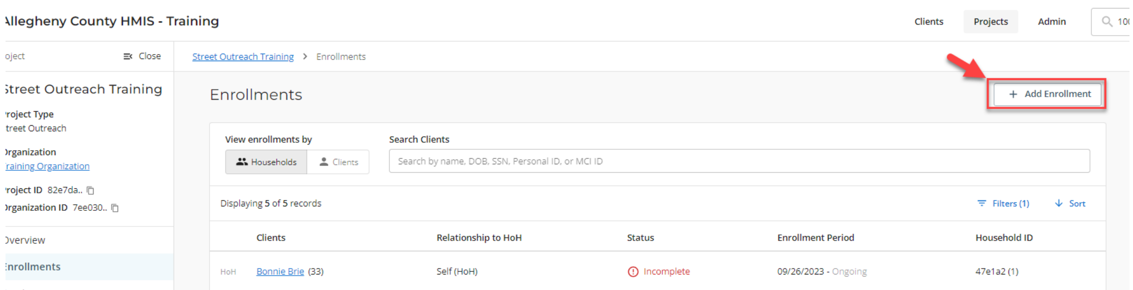


MCI ID- Possible Matches displaying in the Enroll A New Client pop-up

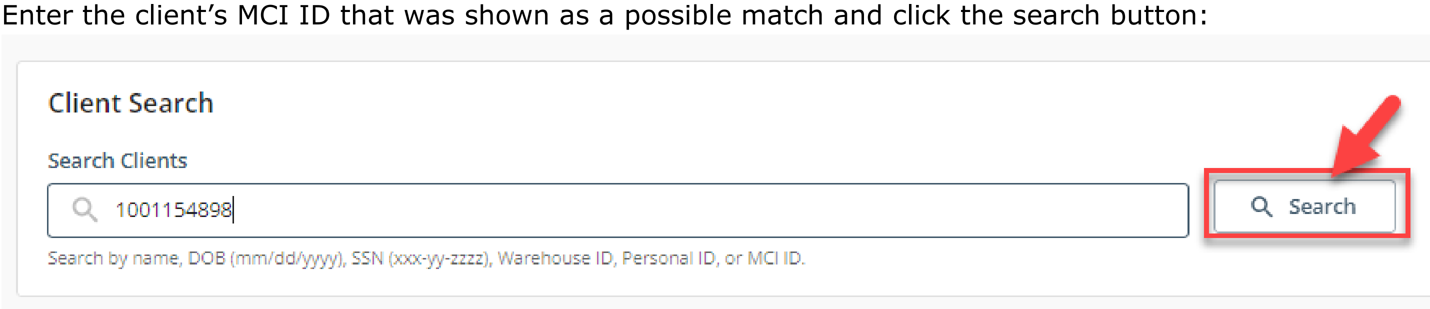
If potential matches display after the Enroll a New Client pop-up is completed, please make note of the MCI ID displaying for the client.



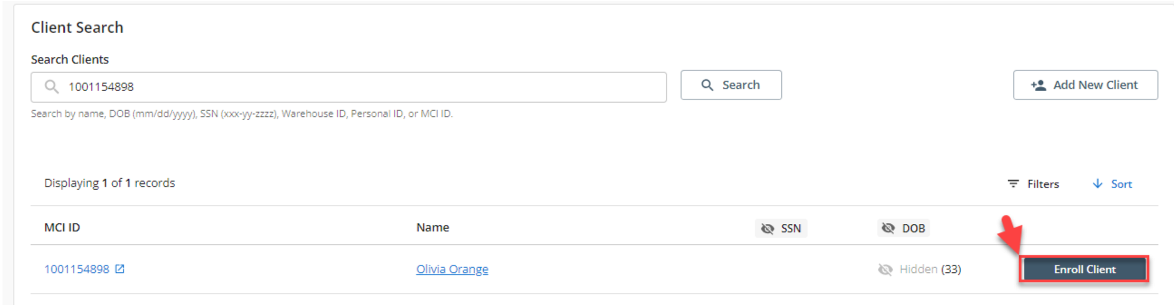
Navigate back to the Enrollment screen. Click the *Add Enrollment* button:



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

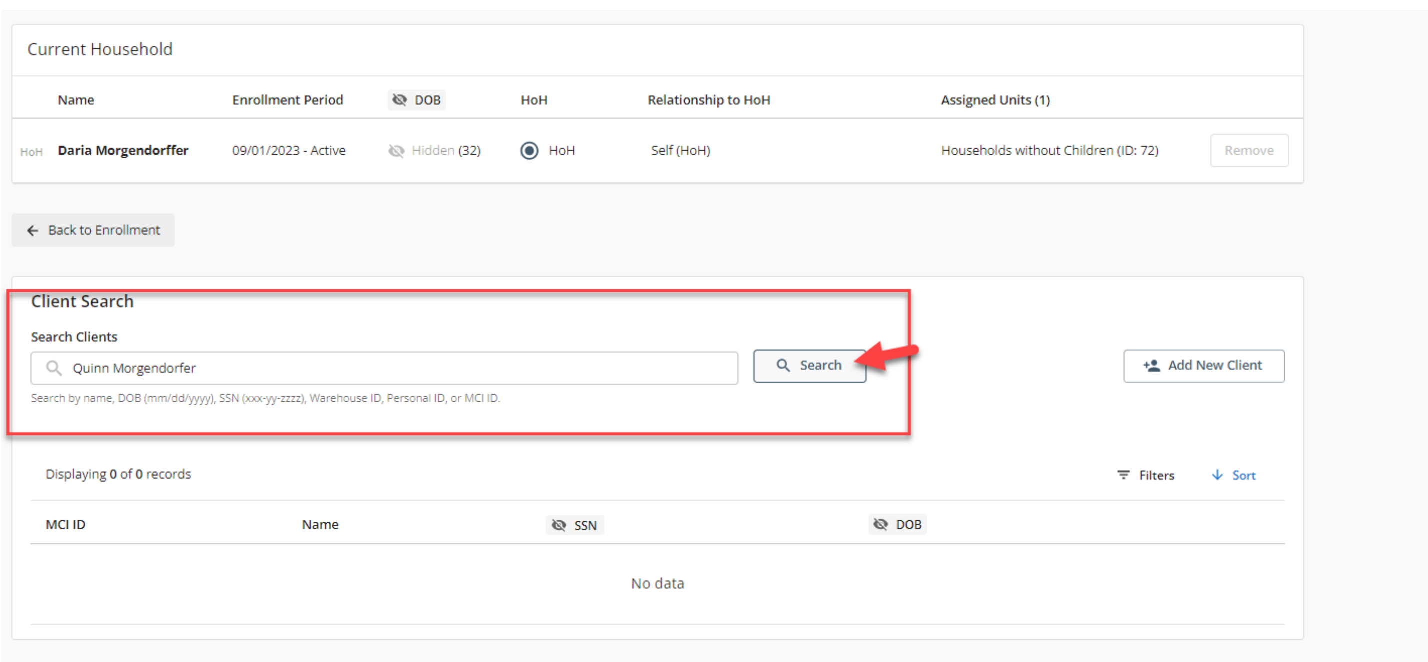


Click the *Enroll Client* button and proceed with completing and submitting the intake assessment as shown previously in this job aid:



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:



MCI ID: Not enough information to clear MCI

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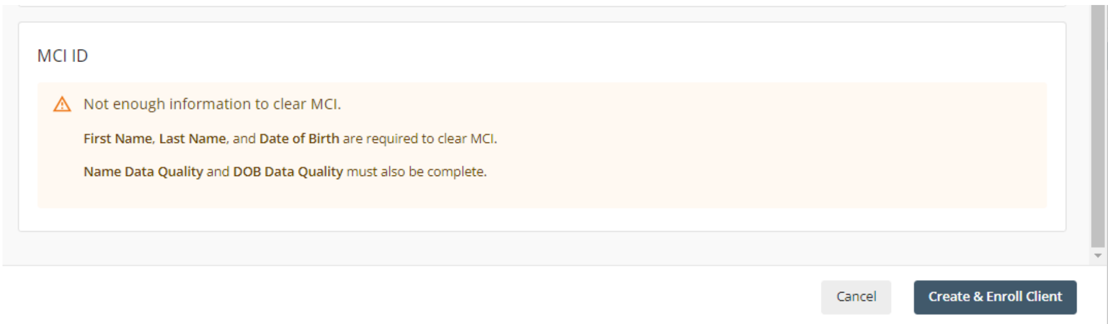


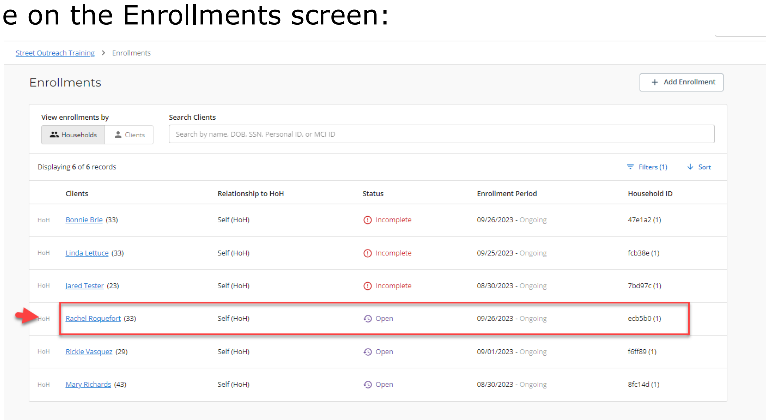
If you are enrolling a client without enough information to search for an MCI ID match, you will receive a message that there must be a first name, last name, Full name data quality, DOB and Full DOB data quality fields.

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.

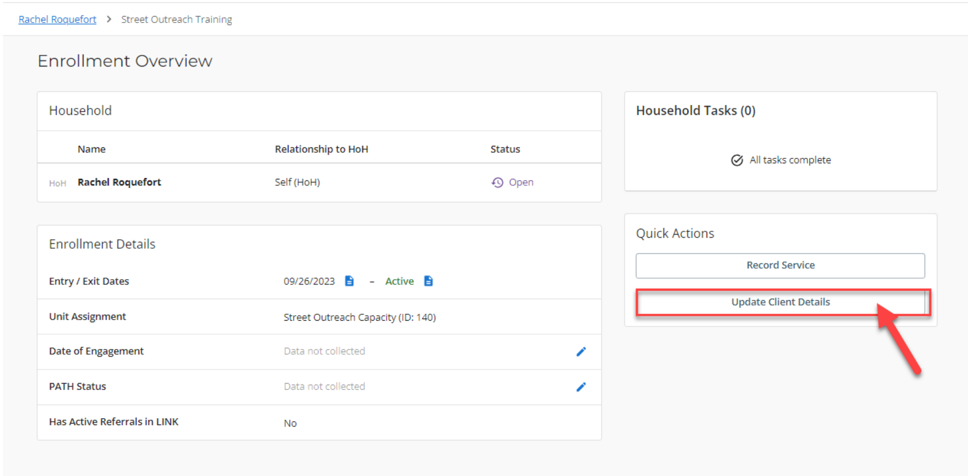
MCI ID: To search for an MCI ID match for an uncleared client enrolled in a project

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:

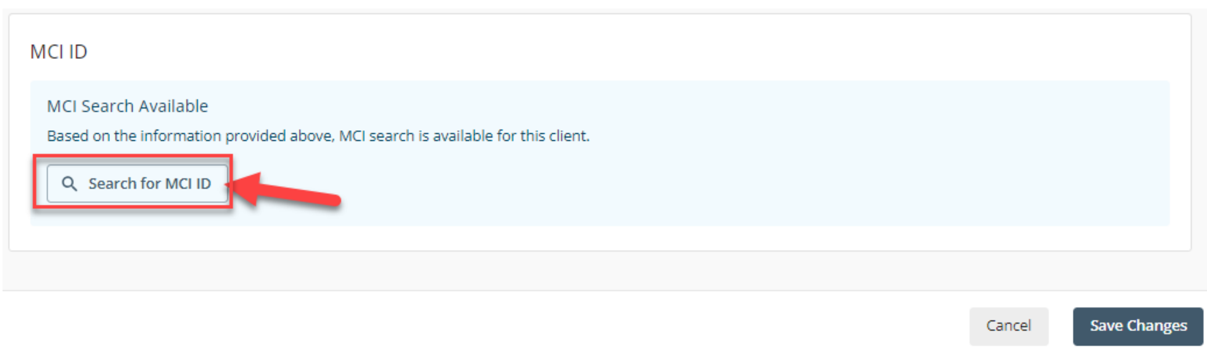


On the client's Enrollment overview screen under the Quick Actions section, select the *Update Client Details* button:

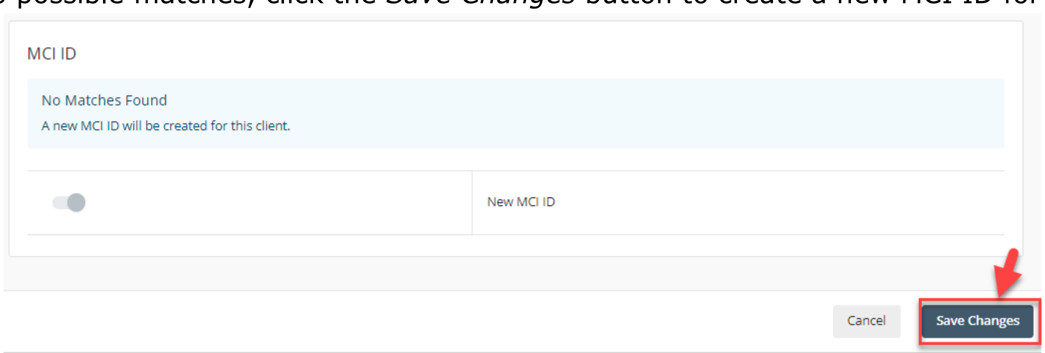


In the *Update Client Details* pop-up, update the client's name fields and name data quality to full, as needed; update the client's date of birth and date of birth data quality to full, as needed.

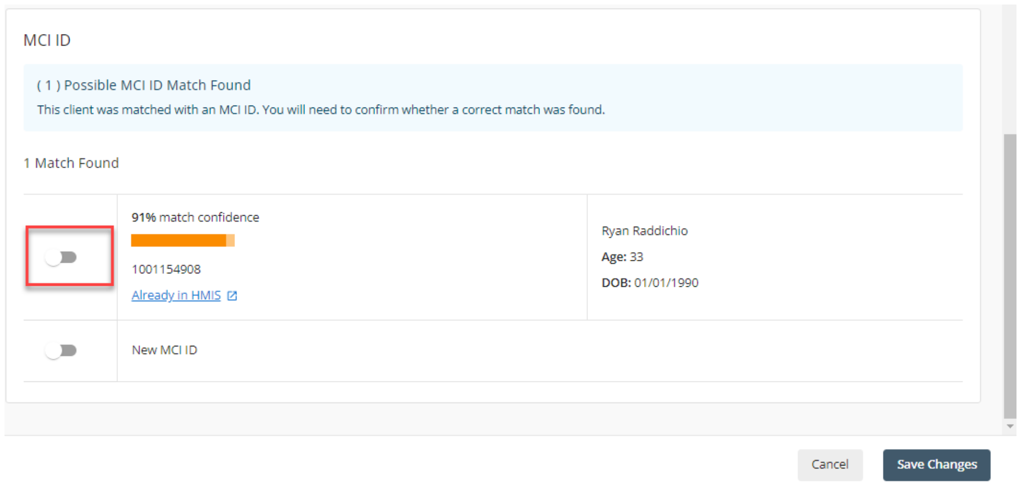
At the bottom of the pop-up, the MCI ID section should display the button *Search for MCI ID;* click the button:

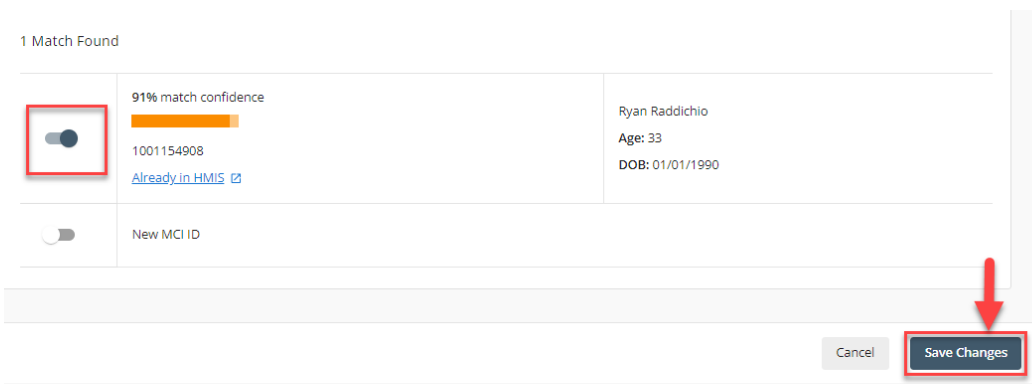


If there are no possible matches, click the *Save Changes* button to create a new MCI ID for the client.



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:





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. This 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/