



Interim HMIS Job Aid - Adding Household Members to an Enrollment from the Referral

Temporarily, household members associated to a referral from Coordinated Entry to a provider's project are not displaying on the Enrollments screen with the Head of Household upon the referral task status being updated to *Accept-Enroll in Project*.

This will be remedied in the future and all HHMs will display upon the referral's task being updated to *Accept-Enroll in project*. However, this job aid will describe the interim process for provider users to add household members to the household's project enrollment themselves.

Viewing Household Members on the Referral

On the *Referrals* screen, select the referral to view. **Please note that the referral's task decision should be *Accept-Enroll in Project* before the provider user adds household members to the enrollment.**

Green Grass Emergency Shelter > Referrals

Referrals

Displaying 1 of 1 referral

Client	Status	Current Task	Days on Current Task	Assigned To	Referral Date	Unit	
Ashley Green	Assigned	Confirm Success	13 days	CE Staff	10/09/2025	Unit 200783 - Households without Children	

If the referral is for a household of more than one person, the household composition and household roles will be displayed under the Source Enrollment Details section housed within the Details section of the referral.

To view the household information on a referral, select the *Details* button within the referral.



Green Grass Emergency Shelter > Referrals > Referral

Referral for Ashley Green

Details

Activity

Open Tasks (1)

Enrolled

Ashley Green

Green Grass Emergency Shelter

Confirm Success

Available 13 days ago CE Staff No assigned users

Completed Tasks (5)

As the *Details* section expands on the page, navigate down to the Source Enrollment Details section and expand it as needed to view the household member information.

Details

Referral Details

Referral Status

Assigned

Referral ID

129

Date Started

09/19/2025

Unit

Unit 200829 - SRD

Project

Blue Bridge Housing

Client Details

Client ID

200830

Client Name

Charlotte Cheddar

Client Age

30 years

Assessment Result Score

9

Post Referrals to Waitlist

Yes

Void All Referrals

Is this household considered Transition Aged Youth (TAY)?

No

Military Service

No

What is the household composition?

Household without minors

Is this household HUD Chronically Homeless?

Yes

Date Assessment Created

09/16/2025

Source Enrollment Details

Source Enrollment Details

Project Name ACDHS Coordinated Entry (Training)

Project Type Coordinated Entry

Entry/Exit Dates 10/01/2025 - Active

Enrollment Link [View Enrollment](#)

Household Members
Ava Green (Child) [View](#)
Ashley Green (HoH) [View](#)



Reviewing the Household Members' Client screen: Confirming Demographics and MCI ID

Selecting the hyperlinked name of the additional household member/s will open up their HMIS client record in a new tab.

Navigate to the household member/s Client record screens in the newly opened tabs. Confirm the demographic information of the household member on the screen.

To view the MCI ID for the household member for, expand the Client IDs tab.

Provider users are able to search for the household member by name, SSN, or DOB when searching to add them to the household's enrollment; however, MCI ID is recommended. Users are able to copy and paste the MCI ID from the Client screen into the search section in the next step.

The screenshot shows the Allegheny County HMIS - Training interface. The browser tabs at the top show "Allegheny County HMIS - Training" and "Alleghey County HMIS - Traini". The address bar shows the URL "alleghey-hmis-training.openpath.host/client/=/MTIMEWywY0QzM25pS1gwWmRwT1J6QT09/profile". The navigation bar includes links for "OKTA Demo", "HMIS- Training", "HMIS-Staging", "Warehouse- Staging", "Warehouse-Training", and "GR HMIS Github".

The main content area is titled "Allegheny County HMIS - Training". It shows a client record for "Ava Green". The client's age is 7. The "Overview" tab is selected in the left sidebar. The "Client IDs" section is expanded, showing the following information:

Client IDs	
HMIS ID	201083
Personal ID	28e83a94f50846f7ae56935f1c39cb06
Warehouse ID	201087 ✕
MCI ID	1000623986 ✕

The MCI ID "1000623986" is highlighted with a red box and an arrow. Below the Client IDs section is the "Demographics" section, which shows the following information:

Demographics	
Race	Black, African American, or African
Gender	Woman
Sex	Female
Pronouns	Data not collected
Veteran Status	Data not collected



Adding the Household Member/s to the Enrollment

From the household member's Client record, navigate back to the original HMIS tab and navigate to the project's Enrollments screen.

The HOH will be displaying in *Incomplete* status if the referral task decision has been changed to *Accept-Enroll in Project* and the HOH has not yet had their intake submitted.

ning Dashboard Clients **Projects** Search

Green Grass Emergency Shelter > Project Enrollments Households

Enrollments + Add Enrollment

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

Displaying 3 of 3 households Columns Filter Sort

Client Name	Age	Relationship	Entry Date	Status	
Ashley Green	51	HoH	10/22/2025	Incomplete	
Shirley Jones	91	HoH	09/09/2025	Open	
Lars Ulrich	69	HoH	08/26/2025	Open	

Once the user selects the HOH's name, it will navigate the user to the household's Enrollment Overview screen for the project.

On the left-hand pane, select the Household button.

Allegheny County HMIS - Training Dashboard Clients Projects Search Trail

Enrollment Close Ashley Green > Green Grass Emergency Shelter

Ashley Green
Project
Green Grass Emergency Shelter
Project Type
Emergency Shelter - Entry Exit
Enrollment Period
10/22/2025 - Incomplete
Enrollment ID
201157

Enrollment Overview
Household Assessments Services Current Living Situations

Enrollment Overview

Household		
Name	Relationship to HOH	Status
HOH Ashley Green	Self (HOH)	Incomplete

Ashley Green Enrollment Details

Enrollment Status	Incomplete
Entry / Exit Dates	10/22/2025 - Active
Other Open Enrollments	1
Unit Assignment	Households without Children (ID: 200783)
Has Active Referrals in LINK	No
Number of Units Assigned to Household	1
HUD Chronic	No

Household Tasks (1)

Finish Intake Assessment	Overdue
1 intake assessments have not been submitted.	

Quick Actions

Record Service

Update Client Details

On the Household screen, select the + Add Household Member section to expand it. A search bar will display.

Enter the MCI ID for the household member. Name, SSN, or DOB can also be used to search.



Enrollment Close Ashley Green > Green Grass Emergency Shelter > Household

Ashley Green
Project: Green Grass Emergency Shelter
Project Type: Emergency Shelter - Entry Exit
Enrollment Period: 10/22/2025 - Incomplete
Enrollment ID: 201157

Enrollment Overview
Household
Assessments
Services
Current Living Situations

Household for Ashley Green at Green Grass Emergency Shelter

Household ID: 683044

Name	Entry Date	Status	HoH	Relationship to HoH	DOB	Assigned Units (1)	MCI ID
Ashley Green	10/22/2025	Incomplete	✓	Self (HoH)	Hidden (51)	Households without Children (ID: 200783)	1000623956

Intake Assessment Exit Assessment

+ Add Household Member

Review the search results; if the information matches the household's information shared at intake, select the *Add to Household* button to add the member to the household.

+ Add Household Member

Search for Client
 Search Add New Client

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

Displaying 1 of 1 client

Client Name	MCI ID	DOB
Ava Green	1000623986	Hidden (7)

Filter Sort Add to Household

A box will pop-up asking the user to confirm the household member's entry date and relationship to HOH. The entry date can be back-dated as needed. Enter the information and then select the *Enroll* button to add the household member to the household.

Allegheny County HMIS - Training Dashboard Clients Projects

Enrollment Close Ashley Green > Green Grass Emergency Shelter > Household

Ashley Green
Project: Green Grass Emergency Shelter
Project Type: Emergency Shelter - Entry Exit
Enrollment Period: 10/22/2025 - Incomplete
Enrollment ID: 201157

Enrollment Overview
Household
Assessments
Services
Current Living Situations

Household for Ashley Green at Green Grass Emergency Shelter

Household

Name	Entry Date	Status	HoH	Relationship to HoH	DOB	Assigned Units (1)
Ashley Green	10/22/2025	Incomplete	✓	Self (HoH)	Hidden (51)	Households without Children (ID: 200783)

Intake Assessment Exit Assessment

+ Add Previously Associated Household

+ Add Household Member

Search for Client
 Search

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

Displaying 1 of 1 client

Enroll Ava Green

Entry Date (Required): 10/22/2025

Relationship to HoH (Required): Child

Unit: Households without Children (ID: 200783)

Cancel Enroll



Add other household member as required, following the same process.

Enrollment Overview

Household		
Name	Relationship to HoH	Status
HoH Ashley Green	Self (HoH)	🔴 Incomplete
Ava Green	Child	🔴 Incomplete

Household Tasks (1)

Finish Intake Assessment

2 intake assessments have not been submitted.

Overdue

Quick Actions

All household members added to an enrollment will be added in *Incomplete* status. All household members must have intake assessments completed and submitted in order to be considered enrolled and active/open in the provider’s project.

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/>