



My Dashboard – HMIS Job Aid

For HMIS providers, the Dashboard displays referrals assigned to staff at the user level. Currently, assignments occur for providers only for referrals. Currently, enrolled clients are not assigned to individual provider staff but are available for all users of an organization to view and manage data collection.

For each user, the dashboard offers a personalized view of the status of all referrals assigned to them, regardless of the project the referral is assigned to or in progress with.

The Dashboard is a tool that assists in keeping referral statuses, notes, and activity up to date.

Navigating to and Using the Dashboard

Log in to HMIS. Upon logging in, select the *Dashboard* button along the top of the screen.

Dashboard Clients Projects Search

Clients

Search Type

Broad Search Specific Search

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

To add a client, search first. Search Tips: Search by name, DOB (mm/dd/yyyy), SSN (xxx-yy-zzzz), Warehouse ID, Personal ID, or MCI ID. It is often most efficient to search using the first few characters of the first name and last name, e.g. to find Jane Smith you might search for ja sm.

On the *Dashboard*, the user will see their name displayed at the top.

There are two sections of the *Dashboard* screen- *Your Clients and Referrals*.

GIG PROVIDER

HMIS Dashboard

Your Clients

Households with active enrollments assigned to you

Displaying 0 of 0 assignments Columns

Head of Household	Members	Project	Entry Date	Household Status
No clients assigned to you				

Referrals

Provider Outcome

Assigned Today

Silver Moon RRH Laura Lemon



Currently, the *Your Clients* section does not apply to HMIS provider users. The *Referrals* section will display all the referrals assigned to the staff person, including the task name, task date, project, and HOH name associated to the referral.

GIG PROVIDER
HMIS Dashboard

Your Clients

Households with active enrollments assigned to you

Displaying 0 of 0 assignments

Columns

Head of Household	Members	Project	Entry Date	Household Status
No clients assigned to you				

Referrals

Provider Outcome

Assigned Today

Silver Moon RRH Laura Lemon

This *Dashboard* shows a referral assigned to the provider user today in the Provider Outcome task. The referral is for HOH Laura Lemon who is assigned to Silver Moon RRH.

Accept- Add to Project (before and after intake is completed- can select this to change decision)

Allegheny County HMIS - Training

MARY ANN BLUE SKY
HMIS Dashboard

Your Clients

Households with active enrollments assigned to you

Displaying 0 of 0 assignments

Columns

Head of Household	Members	Project	Entry Date	Household Status
No clients assigned to you				

Referrals

Change Provider Outcome (Optional)

Assigned Today

Yellow Sun PSH Paulina Pasta

This *Dashboard* shows a referral that has been assigned to the provider user and was accepted.

This referral is not yet enrolled, so the provider user has the optional task available to them to update the Provider Outcome task from *Accept- Add to Project* to *Decline- Submit for Denial Review* if the referral declines or is ineligible after originally being accepted.



If this situation does not apply to the referral, the provider can disregard this task and continue working to enroll the referral into the project.

Allegheny County HMIS - Training

MARY ANN BLUE SKY
HMIS Dashboard

Dashboard Clients Projects Search

Your Clients
Households with active enrollments assigned to you
Displaying 0 of 0 assignments

Head of Household	Members	Project	Entry Date	Household Status
No clients assigned to you				

Referrals

Provider Outcome (Second Attempt)
Assigned Today
Yellow Sun PSH Bruce Wayne

Provider Outcome
Assigned Today
Yellow Sun PSH Quinton Quiche

Provider Outcome
Assigned Today
Yellow Sun PSH Apple McCoy

If a referral was submitted as declined, but the declined referral was re-assigned to the provider to work with (either second or third attempt), then the re-assigned referral will display on the provider user's *Dashboard* as being back in the **Provider Outcome Task** (with attempt number).

GIG PROVIDER
HMIS Dashboard

Dashboard Clients

Your Clients
Households with active enrollments assigned to you
Displaying 0 of 0 assignments

Head of Household	Members	Project	Entry Date	Household Status
No clients assigned to you				

Referrals
No referral tasks assigned to you

This *Dashboard* shows that no referral tasks are assigned to the provider user.

When a referral has been marked *Decline- Submit for Denial Review* by the provider; no tasks will display on their dashboard.

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 the Service Desk go to: <https://dhs-servicedesk.alleghenycounty.us>

This and other Job Aids can be found at: <https://dhsapplicationsupport.alleghenycounty.us>