

## My Dashboard - HMIS Job Aid

For HMIS providers, the Dashboard displays referrals assigned to staff at the user level. Currently, assignments occur for providers <u>only</u> 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.

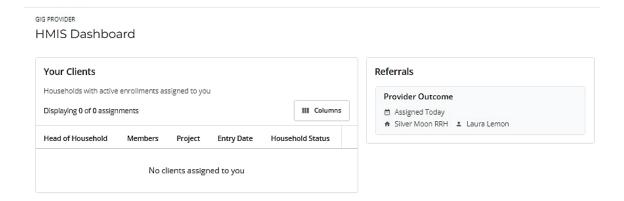
## Navigating to and Using the Dashboard

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



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

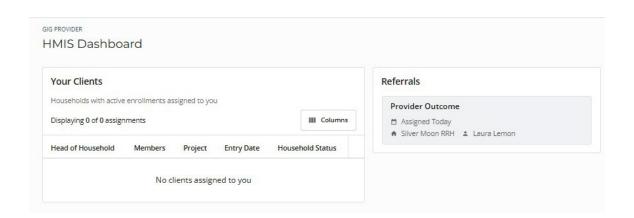
There are two sections of the Dashboard screen- Your Clients and Referrals.





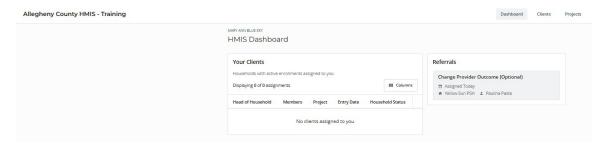


Currently, the *Your Clients* section does not apply to HMIS provider users. The *Referrals* section will display all the referrals assigned to the staff person, including the task name, task date, project, and HOH name associated to the referral.



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)



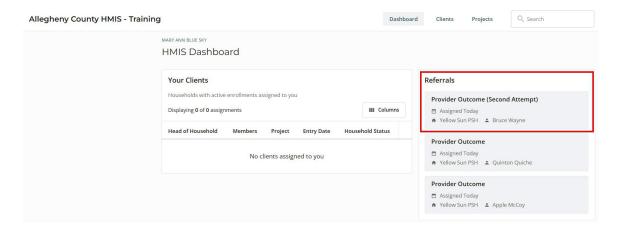
This *Dashboard* shows a referral that has been assigned to the provider user and was accepted.

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.

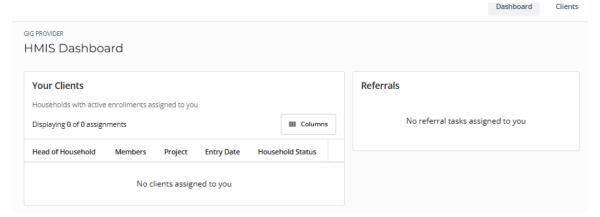




If this situation does not apply to the referral, the provider can disregard this task and continue working to enroll the referral into the project.



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).



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 <a href="mailto:dhs-servicedesk@AlleghenyCounty.US">dhs-servicedesk@AlleghenyCounty.US</a> 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