



Units Screen Navigation and Unit Management

HMIS Job Aid

This job aid will walk through how to navigate and use the information displayed on the Units screen.

It will demonstrate how projects that receive referrals through Coordinated Entry and Invite-Only projects will use the Unit screen to indicate they are ready to receive referral/s.

It will walk through how direct entry projects can indicate unit/s are open and ready for a client or household to be enrolled.

Units Screen Navigation

Log into HMIS and select the project. Once the user has selected the project, to navigate to the Units screen, select the *Units* button on the lefthand pane

Project

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

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

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	⋮

+ Add Units

UNIT GROUP
Households with Children
10 / 10 units vacant

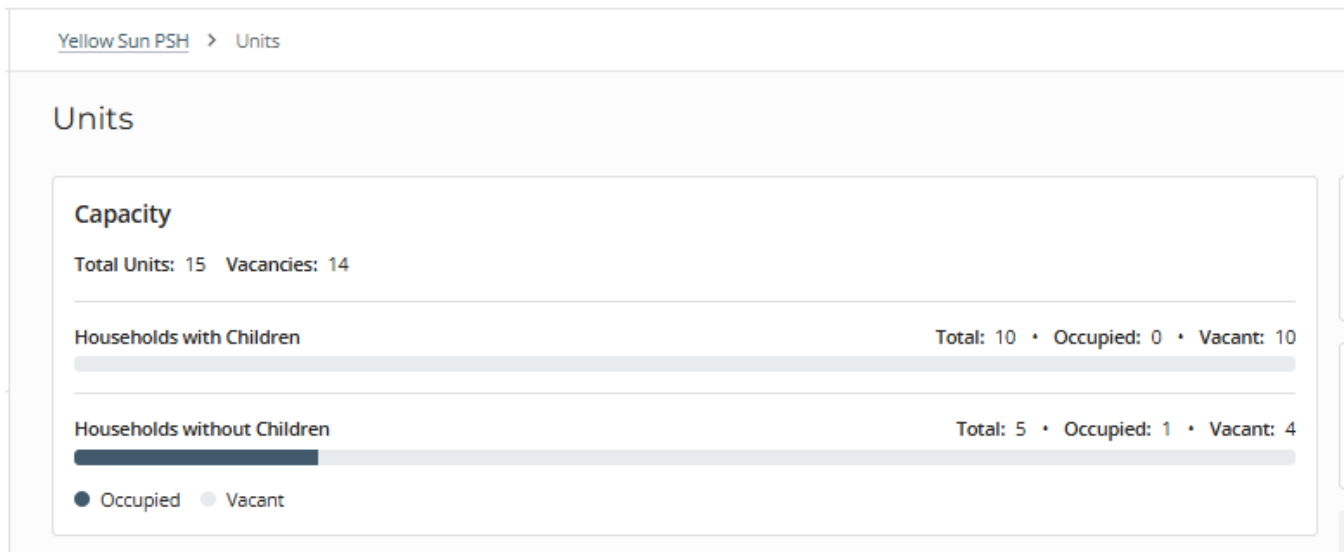
UNIT GROUP
Households without Children
4 / 5 units vacant

+ Add Unit Group



On the Units screen, the project's capacity will be displayed along the top.

The Capacity section will show the project's total units, the number of occupied units, and the number of vacant units, along with a visual bar showing occupancy vs. vacancy for each of the project's unit types.



Please note: Units are determined by a project's contract, and for non-contracted projects, by agreement with OCS at the time of project start. Unit capacity is managed and maintained by DHS.

The Units section will display the following information for each all of the project's units:

- Unit type (Households with Children, Households Without Children, bedroom-size units if applicable)
- Unit ID (a system-generated ID for each unique unit)
- Unit group (the grouping of each unit type)
- The occupancy status of the unit
- Client occupants (if applicable)
- Referral status of the unit



Yellow Sun PSH > Units

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	...
Households with Children	200921	Households with Children	Vacant		Not Accepting Referrals	...
Households with Children	200922	Households with Children	Vacant		Not Accepting Referrals	...
Households with Children	200923	Households with Children	Vacant		Not Accepting Referrals	...
Households with Children	200924	Households with Children	Vacant		Not Accepting Referrals	...
Households with Children	200925	Households with Children	Vacant		Not Accepting Referrals	...
Households with Children	200926	Households with Children	Vacant		Not Accepting Referrals	...
Households with Children	200927	Households with Children	Vacant		Not Accepting Referrals	...
Households without Children	200777	Households without Children	Vacant		Not Accepting Referrals	...
Households without Children	200778	Households without Children	Occupied	Stef Spaghetti	Not Accepting Referrals	...

The Column button at the top right of the Units grid will allow the user to choose to display client occupants of occupied units.

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	...

SHOW COLUMNS

☒ Client Occupants

Reset Cancel Apply



The Filter button at the top right of the Units grid will allow the user to filter the project's Units grid by occupancy status (vacant or occupied) and by unit type.

Units

Displaying 5 of 5 units

Unit Type	Unit ID	Unit Group	Occupancy	Client Occupants
Households without Children	200777	Households without Children	Vacant	
Households without Children	200778	Households without Children	Occupied	Stef
Households without Children	200779	Households without Children	Vacant	
Households without Children		Households without Children		

Columns (1) Filter (Unit Type)

FILTER BY

Occupancy Status

Select Occupancy Status...

Unit Type

Select Unit Type...

Reset Cancel Apply Filters

The Unit Groups listed on the right side of the unit screen display each of the unique unit types associated to the project.

Yellow Sun PSH > Units

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

UNIT GROUP

Households with Children

10 / 10 units vacant

UNIT GROUP

Households without Children

4 / 5 units vacant

Select a unit type to display a filtered view of that unit type's units, and other configuration information. This information is read-only for provider users.

Yellow Sun PSH > Units > Households without Children

VIEW UNIT GROUP

Households without Children

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

● Occupied ● Vacant

Units

Displaying 5 of 5 units

Unit Type	Unit ID	Occupancy	Client Occupants	Referral Status
Households without Children	200777	Vacant		Not Accepting Referrals
Households without Children	200778	Occupied	Stef Spaghetti	Not Accepting Referrals
Households without Children	200779	Vacant		Not Accepting Referrals
Households without Children	200780	Vacant		Not Accepting Referrals
Households without Children	200781	Vacant		Not Accepting Referrals

Columns (1) Filter

Configuration

Referral Workflow

Housing Referral Workflow V1

CE Event Type

Referral to PSH project resource opening

Eligibility Requirements

Must not have open Referral to PSH/RRH/TH Data Source

Must not have open Enrollment at PSH/RRH/TH Data Source

Must be posted to the waitlist Data Source

Prioritization

AHA Score Data Source

Chronically Homeless Data Source

Assessment Date Data Source



How to Mark a Unit "Accepting referrals"

By default, an unoccupied unit will have the status "Not Accepting referrals."

Projects must change the unit/s status to be 'Accepting referrals' in order to work with clients in HMIS.

Projects that receive referrals through Coordinated Entry must update a unit's status to indicate to the DHS Homeless Resource Coordination team that they are ready to work with a new referral.

Please note: similarly to the former process of requesting referrals when the project had vacancies, please only indicate that unit/s are available if you have the capacity to work with that number of new referrals.

Invite-only projects must update the unit's status for DHS staff to admin-assign a referral to the project.

Direct entry projects must update their unit's status to enroll a client directly.

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	Not Accepting Referrals	View Unit Start Accepting Referrals View Unit Group
Households with Children				Not Accepting Referrals	



How to Mark Multiple Units Available Simultaneously

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

Note: If projects that accept referrals from Coordinated Entry find they have a large amount of simultaneous vacancies, they should mark a maximum of three units available (per week) and they should let the Homeless Resource Coordination team/OCS staff know. As units begin to be assigned to households – please feel free to change additional units to accepting referrals.

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.

Unit Type	Unit ID	Unit Group	Occupancy	Date Occupied	Referral Status
☐ Households without Children	200302	Households without Children	Occupied	1/1/18	Not Accepting Referrals
☐ Households without Children	200301	Households without Children	Vacant		Not Accepting Referrals
☐ Households without Children	200304	Households without Children	Vacant		Not Accepting Referrals
☐ Households without Children	200303	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

Unit: Households without Children

Project Type: Emergency Shelter - Entry Exit

Organization: Blue Sky Organization

Project ID: c11857 - C

Organization ID: 420956 - C

Overview

Enrollments

Assessments

Services

Current Living Situations

Bed Nights

Referrals

Units

Inventory

Funders

CoEs

Households without Children

Total: 5 - Occupied: 2 - Vacant: 3

3 selected

Start Accepting Referrals (0)

Stop Accepting Referrals (0)

Displaying 5 of 5 units

Unit Type	Unit ID	Occupancy	Client Occupants	Referral Status
☐ Households without Children	200782	Occupied	Larry 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

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. For CE and invite-only projects, this indicates to OCS staff that they can begin taking action to fill the vacancy with a referral.

Understanding a Unit's Referral Status

A vacant unit that is marked as **Not Accepting Referrals** shows the option to begin accepting referrals will not be filled or acted upon with a referral; it is essentially off-limits to DHS staff until the provider organization updates the unit's status to **Start Accepting Referrals**.

Households with Children	200919	Households with Children	Vacant	Not Accepting Referrals	⋮
Households with Children	200923	Households with Children	Vacant	Not Accepting Referrals	⋮
Households with Children	200924	Households with Children	Vacant	Not Accepting Referrals	⋮

View Unit

Start Accepting Referrals

View Unit Group



Units that are marked *Vacant* with the status **Referral In Progress** do not display an Assigned referral when the provider user clicks the *View Unit* option in the right-hand menu of the row indicates that this a unit (previously marked to accept referrals) that OCS staff are working to match an eligible referral to the vacancy but a referral is not yet assigned.

☐	Households without Children	200945	Households without Children	Vacant	Referral In Progress	View Unit View Unit Group
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[Yellow Sun PSH](#) > [Units](#) > Households without Children (ID: 200945)

Households without Children (ID: 200945)

Eligibility Requirements

Must be referred to Households without Children
Must not have open Referral to PSH/RRH/TH
Must not have open Enrollment at PSH/RRH/TH
Must be posted to the waitlist

Unit Group
Data Source
Data Source
Data Source

Prioritization

AHA Score
Chronically Homeless
Assessment Date

Data Source
Data Source
Data Source

A vacant unit with a **Referral in Progress** that does display an Assigned referral when the provider user clicks the *View Unit* option in the right-hand menu of the row indicates that this a unit is now in the Provider Outcome Task and can be worked with by the assigned provider project staff.

(For more information on provider tasks, the referral workflow, and assigned referrals please see the **Referral Management job aid** and **the Dashboard job aid**).

☐	Households without Children	200944	Households without Children	Vacant	Referral In Progress	View Unit View Unit Group
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Yellow Sun PSH > Units > Households without Children (ID: 200944)

Households without Children (ID: 200944)

In-Progress Referral

Client Name

Molly Mushroom

Referral Status

Assigned

Continue Referral

Eligibility Requirements

Must be referred to Households without Children

Unit Group

Must not have open Referral to PSH/RRH/TH

Data Source

Must not have open Enrollment at PSH/RRH/TH

Data Source

Must be posted to the waitlist

Data Source

Prioritization

AHA Score

Data Source

Chronically Homeless

Data Source

Assessment Date

Data Source

☐	Households without Children	200777	Households without Children	Occupied	Apple McCoy	Not Accepting Referrals	⋮
☐	Households without Children	200778	Households without Children	Occupied	Stef Spaghetti	Not Accepting Referrals	⋮
☐	Households without Children	200779	Households without Children	Vacant		Not Accepting Referrals	⋮
☐	Households without Children	200780	Households without Children	Occupied	Paulina Pasta	Not Accepting Referrals	⋮
☐	Households without Children	200781	Households without Children	Vacant		Not Accepting Referrals	⋮

An occupied unit displaying a client’s name indicates the enrolled head of household occupying the unit.

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/>

9/2025

UNITS SCREEN— HMIS JOB AID

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