

Housing Inventory Setup Guide

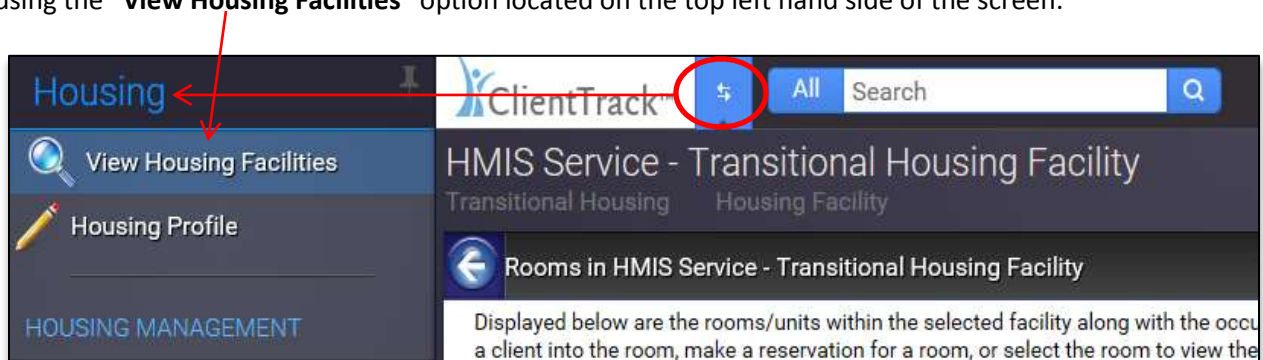
The following guide should allow users with residential programs to become more familiar with the inventory setup and maintenance functions within PA HMIS. This guide will walk users through the main steps involved in setting up and periodically reviewing their Inventory, from both a Housing Facility and Housing Voucher basis.

The system has two fundamental types of Housing Inventory, the first is called “Housing Facility” or “Facility-Based” and includes Emergency Shelters and Transitional and Permanent Housing programs that hold and maintain a set physical inventory. This could include having a set shelter building or a set number of apartments or units that maintain a relatively even number of beds through the year and are used in rotation by your program participants. The second is called “Housing Voucher” or “Voucher-Based” and includes those programs that do not hold and maintain a set physical inventory but instead rely on program funding for rental and hotel/motel assistance to place persons into on-demand housing. The Housing Voucher Inventory allows for the entry and tracking of Tenant Based Rental Assistance (TBRA) programs models for Rental Assistance, Section 8 or VASH vouchers along with Hotel/Motel Vouchers for Emergency Shelters.

Housing Inventory Background:

Prior to getting into the specifics of setting up each Inventory type, a few background notes, all Housing Inventory in terms of setup and review occur with the **Housing** tab of the system. This is available when logged into the HMIS Programs Workgroup.

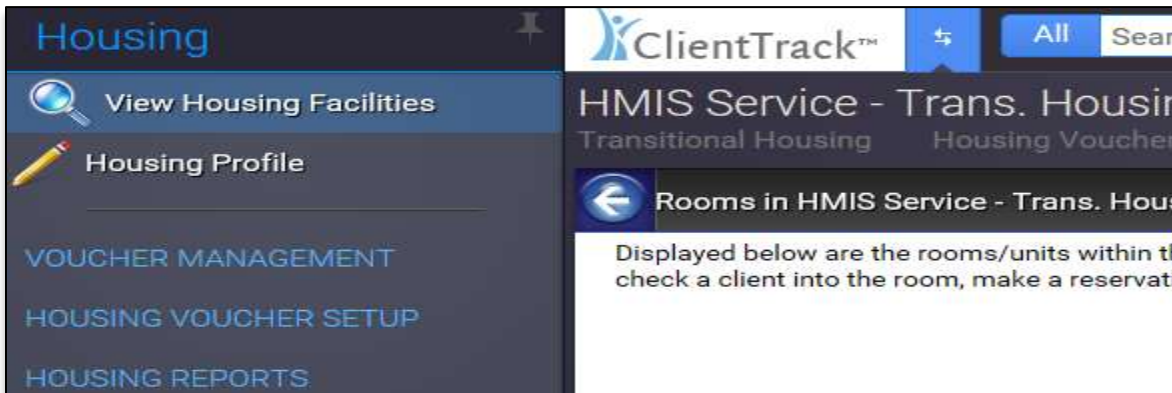
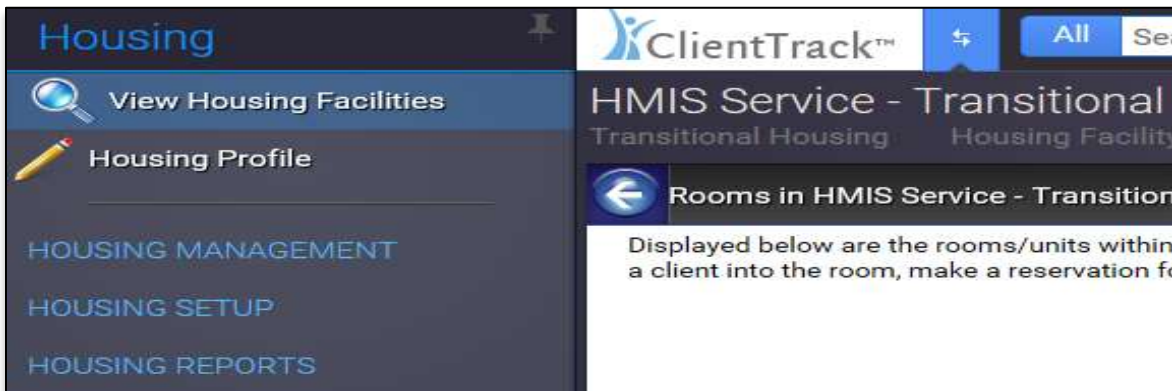
When the Housing tab is loaded the system will display the current Facility (Inventory) that is loaded for your Organization near the top of the screen (directly under the Housing tab). If your organization has more than 1 residential program you will have more than 1 facility and can switch between them by using the “**View Housing Facilities**” option located on the top left hand side of the screen.



When selecting the “View Housing Facilities” option the system will automatically display all of the facilities available within your organization and selecting a specific facility will load its inventory information.

Each residential program in HMIS will have at least 1 facility in which to record its Housing Inventory. This facility will be used to setup, maintain and track all Room (Unit), Bed and Voucher Inventory, along with their usage for that program.

Once loading a Facility, the system will display folders that contain options specific to that facility and include a Management folder (Housing or Voucher) that is used for day to day oversight of the facility's usage (Check-Ins and Check-Outs), a Setup folder (Housing Voucher or Housing) that is used for the setup and administration of the facility's inventory. There is also a Housing Reports folder that contains facility reports.



Depending on the type of Housing Inventory you have defined (Facility-Based or Voucher-Based) the name of the folders and the options contained therein will slightly change and this guide will be focusing on the Setup folders for managerial users.

Please note that Facilities are created automatically at the System Administrator level and every residential program should have an associated Facility. Contact the PA HMIS helpdesk if you notice your facility is not created or unavailable or if you require additional facilities to handle your inventory.

Facility-Based Inventory:

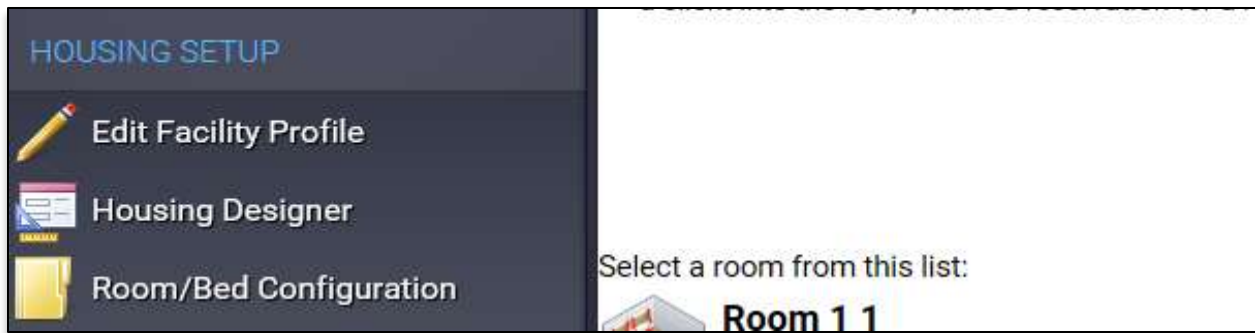
Facility-Based Inventory uses the standard model of predefining a set number of Rooms and a set number of Beds within each of those rooms and then placing program participants into and out of those

same beds. This inventory room and bed setup once entered into the system most likely does not change much during the year and most likely does not even change much from year to year. While a room may be added or removed here and there or a bed may be added/removed or switched to a different room from time to time, the basis of this inventory type is that it is relatively static and typically on-site.

Housing Setup:

Within the Inventory Setup area there are a number of options available for Managers to use to setup and maintain their Facility. The three functions we are going to concentrate on that directly affect your Facility's Inventory and functionality are the Edit Facility Profile, Housing Designer and Room/Bed Configuration, which are the top three options in this area and are circled below.

Please note that there a number of other options available in this area but do not relate to Inventory setup (Rooms and Beds) and are not required to be used for standard operations. We will not be covering these additional options in this guide.



The **Edit Facility Profile** provides a summary profile of the current Facility, related information and a few customizable options. While most of these options are defaulted and will be setup when created by System Administrators, Agency Managers will have some control over certain aspects of their facility(s).

A screenshot of a web form titled "Facility and Address Information". The form has a header that says "Select the Housing Type and enter the Facility address, etc below." Below this, there are several input fields: "Facility Type:" with a dropdown menu showing "Housing Facility"; "Service Type:" with a dropdown menu showing "Transitional Housing"; "Facility Name:" with a text input field containing "HMIS Service - Transitional Housing"; "Address:" with an empty text input field; and "City/State/Zip Code:" with three separate input fields for "City", "State", and "Zip Code". Below these fields, there is another section titled "Organization and Project Association" with a header that says "lists the organization and residential project that is associated to this facility. Also includes the ability to associate an organization location, maximum capacity, default facility cost per night amount and facility comments". This section contains three fields: "Owning Organization:" with a dropdown menu showing "HMIS Service Agency"; "Project Association:" with a dropdown menu showing "HMIS Service - Transitional Housing Program"; and "Location:" with a dropdown menu showing "HMIS Service Agency - Dauphin County - Service Sit".

The main functions that Agency managers can update are the Facility Name, Facility Address and a number of HUD-based Facility Attributes and are recommended to be kept up to date. The one option of note is the **Automatic Check-Out (Next Day)** function, which when enabled, will have the system automatically check all clients out on the next day after their check-in. This option is best used for high volume facilities.

The **Room/Bed Configuration** provides managers with an overview of all of the Rooms created within the Facility and all of the Beds that are created within each room. This feature not only allows for editing of existing items but also the creation of new ones. This function provides all of the features needed to setup and maintain your inventory in a non-graphical interface.

The Housing Designer option will provide the same functionality as the Room/Bed Configuration except in a graphical interface and will be covered next.

When selecting the **Room/Bed Configuration** option the system will display all currently active rooms at this Facility. This could be a single room for large scale shelters or could be a number of rooms that represent individual units or apartments. Rooms must be first created and then Beds are created within each Room.

The screenshot shows the 'Room/Bed Configuration' interface. At the top, there is a 'Room Status' dropdown menu set to 'Active Rooms'. Below this, a table displays the following data:

Room #	Available Beds	Occupied Beds	Room Description	Household Type	Designated Chronically Homeless Persons	Veteran Youth	Rest Youth Bed
1	1	1	Room 1	Households with at least one adult and one child	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	5	3	Room 2	Households with at least one adult and one child	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	5	0	Room 5	Households with at least one adult and one child	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				- SELECT -	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

A blue callout box on the right side of the screenshot contains the text: 'Toggle between "Active" and "Closed" Rooms'. An arrow points from this box to the 'Room Status' dropdown menu.

Each room will be display in a single line or row, and consist of the **Room #**, **Room Description** and **Household Type**. There are additional fields that allow the room to be designated for specific populations along with dates in which the room is available but are all optional.

Any field for any room can be updated by simply updating the specific field and hitting the "Save" button at the bottom of the screen. To add or create a new room, select the **[+]** button at the top of the screen or check the box on an empty row on the bottom of the grid.

This screenshot is a close-up of the bottom portion of the interface. It shows a '+' button at the top left. Below it, a table row is highlighted in yellow, representing an empty row for adding a new room. The table structure is consistent with the previous screenshot.

Once you hit the [+] button or check the box on the bottom grid row the system will provide a new blank line in which to configure your new room. Enter in the **Room #, Room Description** and select the **Household Type** to fulfill the data setup and when completed hit the “save” button to create the room. You can repeat this process for as many new rooms as needed at your Facility.

Household Type Setting Note-

In terms of Household Type, in Client Track the Housing Inventory captures this information on a per Room basis only and includes the standard ‘Adults and Children’, ‘Adults Only’ and ‘Children Only’ types. Once this is set, any Bed setup within a room will inherit this household type. When performing setup for new rooms/beds or configuration of existing rooms/beds make sure you have your facility setup so your beds are properly grouped in rooms based on this household type. In some cases, you may have to create additional rooms, which may not perfectly match your real-world scenario, to allow for the proper association of the household type.

As an example, you may have a single room that contains 20 emergency shelter beds, with 10 that are designated for Families (Adults and Children) and 10 that are designated for Single Adults (Adults Only). Within Client Track you will need to create 2 rooms for your shelter, each with 10 beds and each designated with the proper household type.

In terms of Units or Apartments, having to split out additional rooms by household type will probably not be the normal process as most rooms are of one designation, but if you have beds within a specific room that has different designated types, then in Client Track it will need to be separated. You could have a room named Apt. #101 – Family and include those beds as Adults and Children and then a second room named Apt. #101 – Single and include with the second group of beds as Adults or maybe Children Only.

When performing check-ins please be sure to choose the correct room to allow for the placement of the client(s) into the correct bed. This will allow the system to properly report available and used beds based on their correct predefined household type, which is used in many standard HUD reports (i.e. AHAR, APR, etc.)

Please note that for the Room Availability Dates (Available Begin, Available End), we recommend leaving these fields blank for Rooms that are going to be available year-round.

Once your Rooms are setup and configured the next step is to create/edit the Beds within each Room. Within the Action Menu of each Room (blue ball) you will have 2 or 3 options that include **Room Details**, **View/Edit Beds** and **Delete Room**. The **Room Details** will display a full profile screen of the current room, the **Delete Room** will allow for its deletion if a mistake was made (the delete is only available when the room has not been used) and **View/Edit Beds**, which is the option we are going to discuss in more details below.

<input type="checkbox"/>	Room #*	# Available Beds	# Occupied Beds	Room Description*	Household Type*
<input checked="" type="checkbox"/>	1	1	1	Room 1	Households with at least one adult and one child
<input checked="" type="checkbox"/>	4	0	0	Room 4	Households with at least one adult and one child
<input checked="" type="checkbox"/>				Room 5	Households with at least one adult and one child
<input type="checkbox"/>					-- SELECT --

The **View/Edit Beds** screen is very similar to the previous Room screen with a few customizations to fit this item type. By default the system will load all currently active Beds in the Room selected and each Bed will be displayed in its own line or row and consists of the **Room, Bed #, Bed Description** and **Max Capacity**.

Room:

Bed Status: Toggle between "Active" and "Closed" Beds

1 result found (+1).

<input type="checkbox"/>	Room	Bed #*	Bed Description*	Bed Type*	Icon*	Max Capacity*
<input checked="" type="checkbox"/>	<input type="text" value="1 - Room 1"/>	3	Bed 3	<input type="text" value="Single"/>	<input type="text" value="Single"/>	1
<input type="checkbox"/>	<input type="text" value="1 - Room 1"/>			<input type="text" value="-- SELECT --"/>	<input type="text" value="-- SELECT --"/>	

1

There are additional fields that allow for graphical interface settings such as Bed Type and Icon, but we recommend using the defaults until more comfortable with the Inventory interface.

Any field for any Bed can be updated by simply updating the specific field and hitting the “Save” button at the bottom of the screen. To add or create a Bed, select the **[+]** button at the top of the screen or check the box on an empty row on the bottom of the grid. The same concept used above for Rooms can be applied for Beds and you can create as many Beds as needed within the current Room.

Please note that for the Bed Availability Dates (Available Begin, Available End), we recommend leaving these fields blank for Beds that are going to be available year-round.

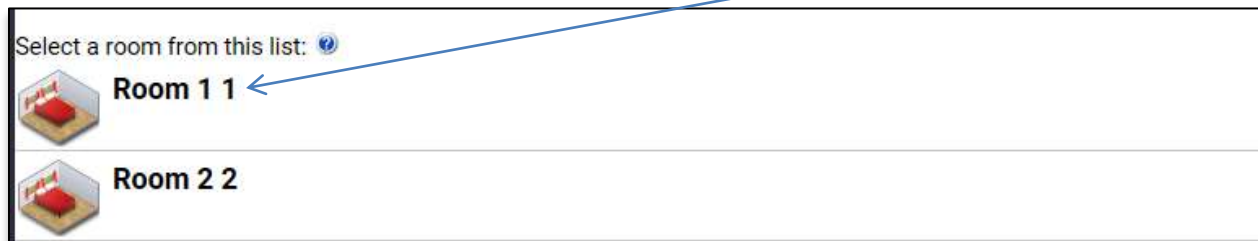
When selecting the **Housing Designer** option, the system will provide the same exact options for Creating/Editing both Rooms and Beds but in a more graphically friendly model and users can determine which style they want to use to setup and maintain their inventory in the system.

When selecting the **Housing Designer** option the system will load a screen that displays all of the currently active Rooms. All Rooms will be listed down the left hand side of the screen, with options to **Edit Room** and **Delete Room**, along with the **Create New Room** available underneath the room list.




Please note that when editing or creating a new Room using this interface the system will provide the full Room Profile (Room Details option from the previous function) in which to enter/update information.

The **Housing Designer** option also provides additional information such as current Beds available and current Bed occupied numbers for each Room on this screen. To create/edit Beds within a Room, you select it from the room list on the screen. This will load a graphical room layout.



To select a room you can select either the room name (Room 1 1) or the Icon next to the room name to load the graphical room screen.

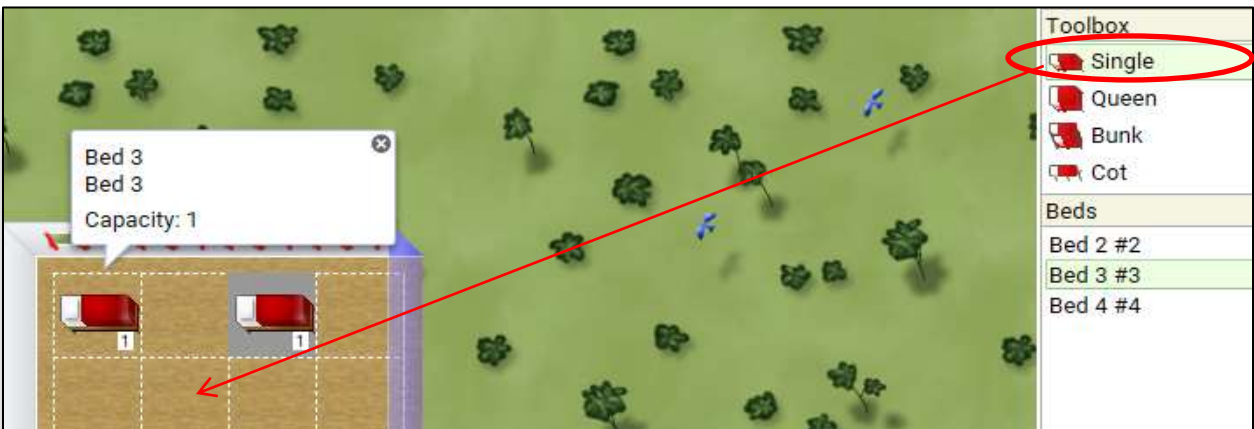
The graphical Room layout displays each room and the individual beds available within the room. Each bed is shown in an icon format and by default is displayed as  which represents a single bed that allows usage by a single person. The graphical layout will not only show Beds, but will update depending on its status and has icons to distinguish between empty and occupied beds (this will be covered in more depth with the Inventory Usage Guide).



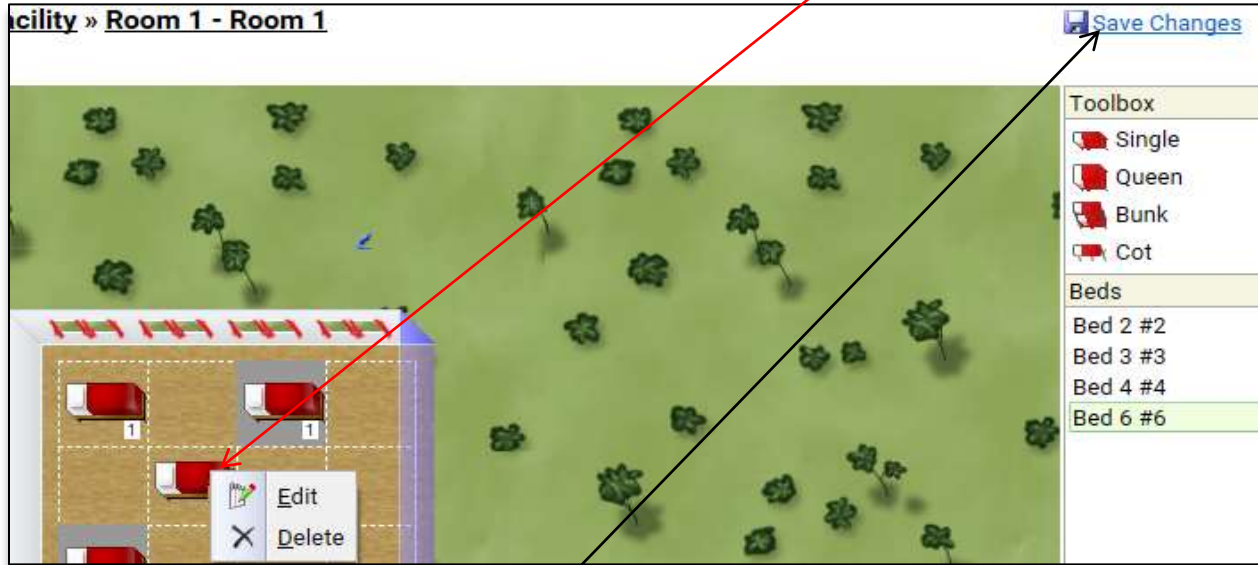
You can edit an individual bed by right-clicking on the Bed Icon, which gives you an “Edit” or “Delete” option. To create or add a new bed to the room you will need to use the **Toolbox** on the top right hand corner of the screen. This tool box contains all of the different types of beds available in the system.



To add a new bed, you select or highlight a type of bed within the Toolbox (we recommend using the Single type for ease of use). Once highlighted, this is the bed type you want to add to your room. The next step is to select an open space within the room layout.



By selecting an open space or square in the room layout, the system will create the new bed as shown below. As long as a bed type in the toolbox is highlighted the system will add a new bed to each open space or square you select in the layout. This provides a quick and easy way to add as many beds as you need to your room in a very short period of time.



Once the new beds are placed, you can right-click on them and **Edit** (or **Delete**) them, which allows you to enter in the Bed # and Bed Description to custom each bed for your use. These edit options can be used for any bed within the room interface.

Once you have finished making any edits to existing beds or have added beds to this room please do not forget to select the “**Save Changes**” option on the top right hand corner of the screen. This is very important and if you leave without selecting this option any action performed may not be saved.

You can use these three options together to ensure that your Facility-Based Inventory for your residential program(s) is setup and maintained with accurate Room and Bed inventory for purposes of HUD reporting and for tracking client usage in the system through our Check-In/Check-out module.

Voucher-Based Inventory:

Voucher-Based Inventory allows for the entering and tracking of Rooms and Beds for programs that do not have a predefined set of Inventory and includes Hotel/Motel Vouchers, and Housing Vouchers. This inventory type allows for programs to estimate their Room (or Household) usage for the upcoming operating year, but does not require the full creation of rooms and beds as with the Facility-Based model. Vouchers for either type can also be created on-the-fly when needed if additional capacity is required.

Another main difference between the Facility-Based model and the Voucher-Based model is that the system can build your inventory as you use it in the system based on your household makeup. This will

require programs to use our Check-In/Check-Out functions to take full advantage of this inventory type and be able to report accurate information.

Please note that since most of the Voucher Inventory is handled when it is used in an on-demand fashion, the setup is much less involved. The below section will explain how to predefined or estimate your Voucher number for the upcoming period and we highly recommend visiting out **Housing Inventory Usage Guide** for further details on its actual usage.

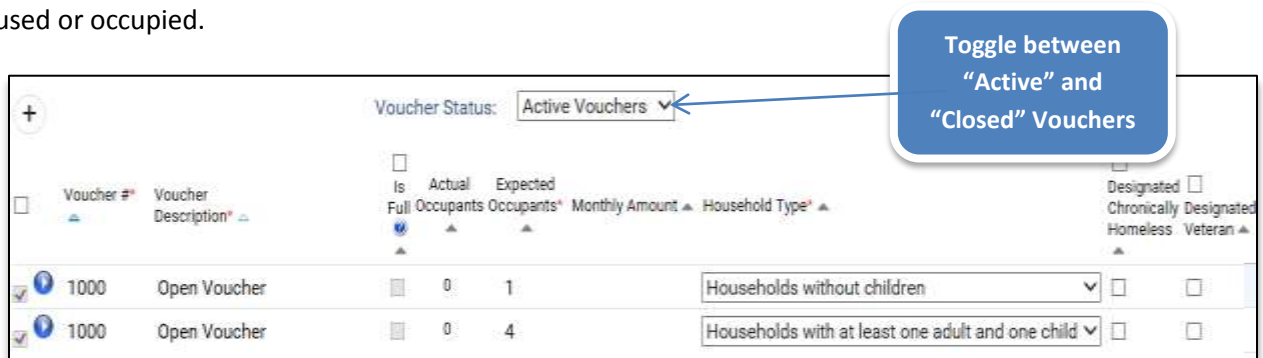
Housing Voucher Setup:

Within the Voucher Setup area there is really only one main function that handles the setup and maintenance of your vouchers, which is **Voucher Setup/Configuration**. This non-graphical option allows for the setup/editing of existing Vouchers and associated clients.



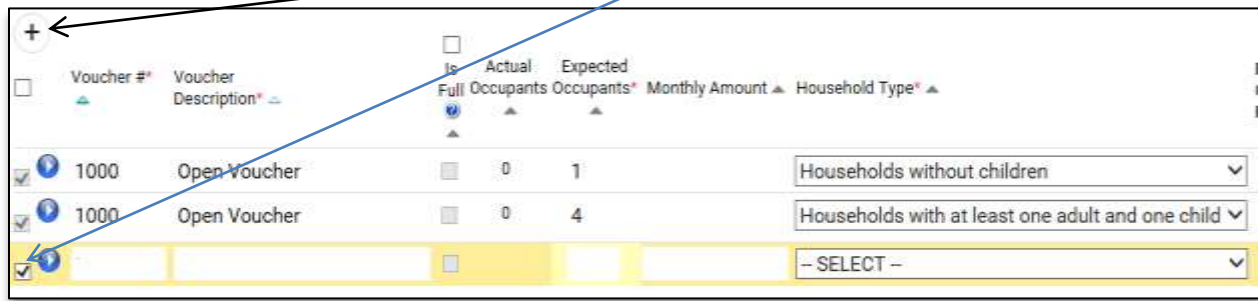
The **Edit Facility Profile** is also available and works exactly the same as described in the above Facility-Based section, and provides a summary view of the current Facility settings.

The **Voucher Setup/Configuration** area provides a listing of all currently active vouchers by default, which includes all estimated vouchers, and available vouchers and vouchers that are currently being used or occupied.



Each voucher will be listed on their own line or row and includes their **Voucher #**, **Voucher Description**, **Actual Occupants**, **Expected Occupants** and **Household Type**. All of these fields, except the Actual Occupants, need to be completed when a new voucher is created.

Any field for any Voucher can be updated by simply updating the specific field and hitting the “Save” button at the bottom of the screen. To add or create a new Voucher, select the **[+]** button at the top of the screen or check the box on an empty row on the bottom of the grid.



Once you hit the **[+]** button the system will provide a new blank line in which to configure your new voucher. Enter in the **Voucher #**, **Voucher Description**, **Expected Occupants** and select the **Household Type** to fulfill the data setup and when completed hit the “save” button to create the room. You can repeat this process for as many new vouchers you would like to estimate you will use at your Facility.

In most cases when estimating Vouchers you are entering in the number of households your program expects to serve during the operating year, and this would be the number of vouchers entered into the system. With the Expected Occupants number the system does need an estimated total for each voucher entered to meet Inventory requirements, please estimate the best you can based on the type of household you plan to serve. Also, when creating or estimating vouchers no dates are required as all vouchers are considered to be available for use by the system.

Please note that Expected Occupants will not affect how you can use the voucher, you can enter in an expected number of 1 and still put 5 persons in the voucher. And once the voucher is used, the system will use the “Actual Occupants” number instead of the “Expected” one.

The system also contains a **Remove Open Vouchers** option located on the top right hand side of the screen. This option will allow users to remove/delete all of the vouchers that have been created but have not been used. This will allow programs the ability to reset their estimated voucher numbers when their situation changes (i.e. more or less funds available) or when a new operating period begins.



Once your Vouchers are setup and configured there are a couple of functions available within the Action Menu of each Voucher record (blue ball). These options include **Voucher Details**, which displays a full profile screen of the current Voucher, and **Delete Voucher** which will allow for its permanent deletion if a mistake was made (the delete is only available when the voucher is not used).

<input type="checkbox"/>	Voucher #*	Voucher Description*	<input type="checkbox"/> Is Full	Actual Occupants	Expected Occupants*	Household Type*
<input checked="" type="checkbox"/>	1000	Open Voucher	<input type="checkbox"/>	0	4	Households with at least one
<input type="checkbox"/>			<input type="checkbox"/>			-- SELECT --
				0	4	

For Voucher-Based Inventory, while you can predefine or estimate vouchers for your programs this is not a requirement for their usage, tracking and reporting in the system. When associating program participants to your vouchers you will be able to use either estimated vouchers or you will be able to create new vouchers on-the-fly during the association (check-in) process.

While most Hotel/Motel Voucher programs will have little need for estimating or creating vouchers beforehand and will most likely use them on-the-fly as needed, some Housing Voucher programs may have a need to estimate their voucher use on a per grant basis for some CoC based reporting or for inventory projection through Coordinated Entry systems.

Miscellaneous Functions:

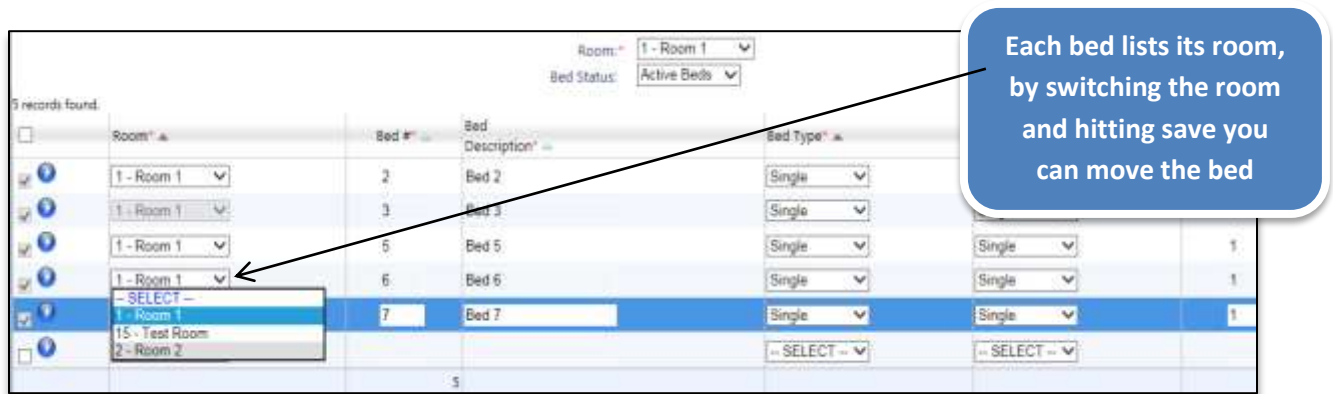
Now that we have covered the main setup functions for both Housing Facility and Housing Voucher operations we will cover some miscellaneous tools and tips that can be used in the maintenance of your inventory.

Bed Transfer (Room to Room):

For Housing Facility operations, there are occasions in which physical beds are moved from one room or unit to another to accommodate for the differing sizes in the households you serve. When a bed is simply moved from one room to another, please do not create a new one, as this will incorrectly increase your overall bed count. We recommend using this Bed Transfer option to move the bed to another room.

This is performed under the Room/Bed Configuration option (under Housing Setup), and the first step is to go to the Room where the bed currently resides. You then choose the Bed Availability option to load the list of beds within that room, and locate the bed or beds you need to transfer.

Each bed will list its current room, and for the ones that are vacant this option will be unlocked and will list all of the rooms at the facility. To transfer a bed to another room, simply select that room from the list and hit “Save” at the bottom of the screen.

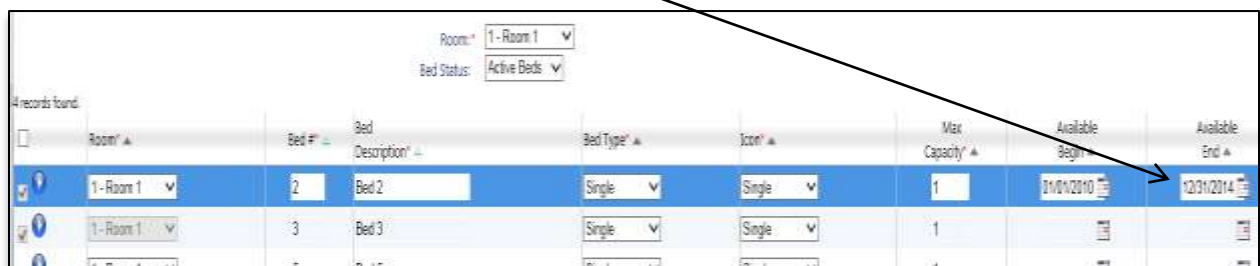


Please note that since we do not allow occupied beds to be transferred you should move the bed prior to performing a check-in, that way when the check-in occurs it will record the new room in which it currently resides.

Bed and Room Close Out:

For Housing Facility operations, during the course of using your inventory, there will be times when you are going to retire or no longer be using a specific Bed or Room. When a Bed or Room has been used (used in terms of has had clients checked into them) and is no longer being used for a program you will need to close out that item.

Closing out an item involves updating the Bed(s) and Room(s) with the appropriate Availability Dates to let the system know the period of time they were being used. If will need to go to the individual Bed(s) and/or Room(s) and update the **Available End** date with the date in which this item was last available for usage at your program.



You will also be required to enter in the **Available Begin** date if it is blank, which denotes when this item was first available for usage at your program. In most cases the Available Begin date will be blank as this is the default when new items are created and this date could go back many years depending on how long it has been in use.

Once both available dates have been completed, hit the “Save” button and the system will close out the inventory items. If the Available End date occurred in the past, this item will then be classified as a “Closed” Room or Bed and will only be visible within those areas.

Each Room and Bed setup screen has a filter for status of either Active or Closed

Room#	Bed#	Bed Description	Bed Type	Icon	Max Capacity	Available Begin	Available End
1-Room 1	2	Bed 2	Single		1	01/01/2010	12/31/2014
1-Room 1	4	Bed 4	Single		1	01/01/2014	03/31/2014

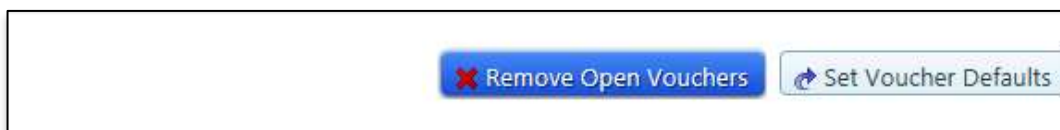
Once a Room or Bed has been formally closed out, the system will remove them from the list of available items during standard check-in and check-out processes. And using the Close Out processes will allow the system to keep historical availability and usage information on record even if the inventory item is no longer being used.

Please note that there is a large difference between Closing Out and Deleting an inventory item. Within the system there are Delete functions for rooms and beds available, but they should only be used when the item has been mistakenly created, not when it is no longer being used. Within the non-graphical interfaces the system will not show any delete function once an item has been used, however these delete functions can still be available within the graphical layouts. It is highly recommended to never use the delete functions in the graphical screens of the system as they do not contain validation to ensure you are not removing collected data.

Set Voucher Defaults:

For Housing Voucher operations, there is an option available within the Voucher Setup/Configuration screen that can reduce the time needed to predefine or estimate their voucher usage. While almost all voucher information is captured in real-time during the check-in and check-out process when they are used the system does allow for the creation of predefined vouchers for those programs that may need to report on expected vs. actual usage.

There is a **Set Voucher Defaults** option that allows a facility to predefine a new voucher’s characteristics to allow for the ability to create them in a batch fashion. This option is located on the top right hand corner of the screen, beside the Remove Open Voucher button.



When selecting this option you are taken to a new screen which can collect a default value for a new Voucher's Name, Expected Occupancy # and Household Type. This can be updated and changed at any time and the system will use these defaults anytime a new voucher is predefined at this facility.

Voucher Default Description:

Voucher Default Exp Occup:

Voucher Default Household Type:

To create or predefine a new voucher, the steps of which are explained in more details above, are to hit the "Add Lines" button and fill in the appropriate required fields. When your defaults are predefined, every time you hit the Add Lines button a new voucher will appear with the defaults completed, you can make any adjustments needed or simply hit "Save" or create the new voucher(s).

Voucher #	Voucher Description	Is Full	Actual Occupants	Expected Occupants	Monthly Amount	Household Type	Designated Chronical Homeless
1000	Woodruff 2 Voucher	<input type="checkbox"/>	0	4	\$850.00	Households with at least one adult and one child	<input type="checkbox"/>
1000	Woodruff Voucher	<input type="checkbox"/>	0	4	\$700.00	Households with at least one adult and one child	<input type="checkbox"/>
1000	New (Open) Voucher	<input type="checkbox"/>		4		Households with at least one adult and one child	<input type="checkbox"/>
1000	New (Open) Voucher	<input type="checkbox"/>		4		Households with at least one adult and one child	<input type="checkbox"/>
1000	New (Open) Voucher	<input type="checkbox"/>		4		Households with at least one adult and one child	<input type="checkbox"/>
1000	New (Open) Voucher	<input type="checkbox"/>		4		Households with at least one adult and one child	<input type="checkbox"/>
1000	New (Open) Voucher	<input type="checkbox"/>		4		Households with at least one adult and one child	<input type="checkbox"/>
2			0	8			

Add Lines

5 new predefined vouchers, all with the same default values, were created with one button push

Please note that by entering in a number next to the Add Lines button, this is the number of new vouchers that will be created when the Add Lines option is enacted.