Housing Inventory Setup Quick Reference Steps

The following Housing Inventory quick reference guide provides a very brief outline of the steps involved in setting and configuring your inventory in Client Track.   It is separated into sections for those using Housing Facility Inventory and Housing Voucher Inventory, and whether you have utilized inventory in the new system or not.

Housing Facility Inventory:

New-

If you have not utilized inventory in the new system, please follow these quick steps using the Housing Inventory Setup Guide to update your inventory.

1) Setup each of your Rooms following Guide
    a. Check to make sure the Name of Room is correct and identifiable and the Household Type is correct
2) Setup each of your Beds within their appropriate Room
    a. Check to make sure the Name of each Bed is correct and identifiable

Existing-

If you have utilized inventory in the new system, please follow these quick steps using the Housing Inventory Setup Guide to update your inventory.

1) Review all existing Rooms
    a. Check each Room's Name
    b. Check and set each Room's Household Type if it is missing
    c. Check to ensure all of the Beds have been properly created and/or placed in each Room
2) Setup any Rooms and accompanying Beds that may be missing
3) Delete or Close Out any Room and/Bed that is no longer being used.

Housing Voucher Inventory:

For any program that wishes to use the new Housing Voucher inventory you must contact to the PA HMIS Helpdesk to ensure this functionality is turned on.   The best way to contact us is through the Client Track system (submit an issue) or through an email to the Helpdesk at ra-pahmis@pa.gov.   The helpdesk will be in contact to discuss the best steps to take to convert your inventory to use the new voucher interfaces.

New –

If you have not utilized inventory in the new system, the most likely action is that your inventory will be completely reset by the Helpdesk and you will start with a fresh blank inventory.   The voucher

interfaces can then be used immediately and it is up to the individual program to decide on whether they want or need to predefine any current voucher s.

Existing-

If you have utilized inventory in the new system, a discussion will be needed to determine the best way to transition to the new voucher system. Since the two systems are not compatible, the 2 main choices are as follows:

1) Reset your current inventory, which includes both the physical inventory (Rooms and Units) along with any usage information (Check Ins and Check-Outs). All of the information can either be re-entered using the new processes or you can start fresh from the conversion point.
2) Close Out your current inventory which includes closing out all Rooms and Units and closing out all Check-Ins. This will keep this information as historical data and will allow for a clean break to start fresh with your new voucher information and processes.

Please note that the Help desk will assist all programs wishing to move to the new voucher method and will perform most, if not all, of the data resets and data cleanup needed for a successful transition.