HMIS Basic Training Resource Guide

Instructions

Use this guide to move through HMIS Basic Training and make notes/record answers to help you successfully complete the online quiz. In this document you will find:

- **Part 1**: Exercise to be completed in HMIS TRAINING site <u>as you watch</u> the video demonstration.
- **Part 2**: Exercise to be completed in HMIS TRAINING site <u>once Part 1 is complete</u>.
- **Part 3**: Once Parts 1 and 2 are complete in HMIS TRAINING site, <u>proceed to the Online Quiz</u> HERE.
- **HMIS Basic Training Video Checklist**: Use this to keep for your own purpose of keeping track of videos viewed.

Part 1: Create Fake Client in HMIS TRAINING Site as 'HMIS Training Program'

As you watch the training videos, follow along in the training site and create your own client (with fake information). Ensure you enter data as *HMIS Training Program.*

Create a new client record using the Golden Rule, and complete the following:

- ❑ Fill in the Client Profile Tab
- ❑ Create a Household
- ❑ Add an ROI
- ❑ Provide your client a program Entry
- ❑ Assign 2 Case Managers
- ❑ Create 1 Goal/Folder, and save 2 notes within it
- ❑ Complete the Housing First Move-In Assessment
- ❑ Provide a program exit

Part 2: Create Fake Client in ServicePoint TRAINING Site as YOUR EDA Program

Once all videos have been viewed, create the same fake client but EDA'd as your real program.

Search for the client you created in Part 1

Can you see the client?   ☐YES   ☐NO
You should NOT be able to see the same client entered as HMIS Training Program while EDA as your Program

EDA as your program and using the Golden Rule complete the following:

- ❑ Fill in the Client Profile Tab
- ❑ Create a Household
- ❑ Add an ROI
- ❑ Provide your client a program Entry
- ❑ Assign 2 Case Managers
- ❑ Create 1 Goal/Folder, and save 2 notes within it
- ❑ Complete the Housing First Move-In Assessment
- ❑ Provide a program exit

Part 3: Complete the Online Quiz HERE

Click the LINK provided to access the Online Quiz

You will be asked the following questions:

1. Your Name: _____
    Enter the same name you registered with

2. Have you completed Part 1 "create a fake client under HMIS training program"?
    ☐YES   ☐NO

3. Have you completed Part 2 "create a fake client under your EDA Program"?
    ☐YES   ☐NO

4. EDA is:
    Entire Data Access
    Enter Data As
    Enter Data Access

5. I must always search for a client before creating a new client profile in ServicePoint
    True
    False

6. 'Less is More' is a client search method, and refers to:
    Less data provides more opportunity to find clean information
    Less data entered pulls back more thorough search results
    Less paperwork is more data entry in ServicePoint

7. There can only be ONE Head of Household
    True
    False

8. The Release of Information (ROI) is:
    Only collected when the client is first entered into the program
    Should be regularly monitored to avoid expiration
    Can be skipped if not a family program

9. To Exit a client from my program I simply press the 'Add Entry/Exit' button
    True
    False

10. I should use the backdate tool
    On all tabs
    On only the Entry/Exit Tab
    On only the Entry/Exit Tab and the Assessment Tab

11. The primary intention of the Case Plans Tab is meant for generic notes, and are not sensitive in nature

 True
 False

12. Sub-Assessments are question under the Service Transactions Tab and are optional to my program

 True
 False

13. The Golden Rule states:

 All data entered in the Summary Tab is just that, a summary, and should not be entered here
 Enter data in ServicePoint using the Sequential Order of the Tabs
 The 4 elements of Data Quality are Timeliness of Data, Data Completion, Data Accuracy, Data Consistency

HMIS Basic Training Video Checklist

Use this checklist to track your progress as you move through the online video series.

Click on the HMIS Basic Training Video Index to view each video. Videos should be viewed in sequential order.

Module 1: Intro to CHSSC & HMIS (approx. 30 min)

- ❑ Topic 1: Introduction
- ❑ Topic 2: HMIS & Privacy
- ❑ Topic 3: CHSSC & Data

Module 2: Intro to HMIS ServicePoint (approx. 30 min)

- ❑ Topic 1: Logging In
- ❑ Topic 2: ServicePoint Interface
- ❑ Topic 3: ServicePoint Module Menu
- ❑ Topic 4: Agency News as Fundamental Data Entry

Module 3: ClientPoint Workflow (approx. 90 min)

- ❑ Topic 1: Duplicate Data & Less-Is-More Search
- ❑ Topic 2: Golden Rule of Data Entry
- ❑ Topic 3: Client Profile Tab
- ❑ Topic 4: Households Tab (FAMILY PROGRAMS ONLY)
- ❑ Topic 5: ROI Tab
- ❑ Topic 6: Entry/Exit Tab
- ❑ Topic 7: Case Managers Tab
- ❑ Topic 8: Case Plans Tab

Module 4: Assessments (approx. 50 min)

- ❑ Topic 1: Intro to Data Quality & Housing First Assessments
- ❑ Topic 2: Housing First Move-in Assessment

❑ Topic 3: CHF Housing Assessment
❑ Topic 4: Housing First Quarterly Follow Up Assessment
❑ Topic 5: Housing First Exit Interview
❑ Topic 6: ClientPoint Summary

Module 5: In Conclusion (approx. 10 min)

❑ Topic 1: Service Transactions
❑ Topic 2: Data Quality
❑ Topic 3: How to Gain Access to LIVE Site