



HMIS Training Instructions

Part ONE

1. Contact HMIS Administrator for access to the **HMIS training/test site:**
hmis@co.shasta.ca.us.
2. Complete **Part ONE Training Video Modules 1-5** at [Shasta County Housing & Community Action - HMIS Resources](#)
 - 1) Intro to HMIS and 1st Time Log In
 - 2) HMIS Intake Form and Entering a New Client
 - 3) Release of Information
Note: Please disregard the training instructions for Single Individuals in Module 3 at 2:08. All Single Individuals must be in a household. Please reference the February 24, 2022 Quarterly Training below the Training Modules.
 - 4) Entry Exit
 - 5) Case Manager, Case Plans and Service Transactions
3. Enter three practice clients in the HMIS training/test site.
4. Email HMIS Administrator the names of your three practice clients for review.
 - a. Feedback will be provided on the results of your practice clients with any required corrections needed.

Please review the policies and procedures while waiting for access to the HMIS training site.
[Shasta County Housing & Community Action - HMIS Resources](#)

Part TWO

1. Complete **Part 2 Training Video Modules 6-8** at [Shasta County Housing & Community Action - HMIS Resources](#)
 - 6) Managing Households
 - 7) Updating and Exiting a Client Record
 - 8) How to Enter New Information on an Existing Client
2. On one of the existing practice clients, create a household, enter them into the program and complete an interim review on the Head of Household and exit all members of the household.
3. Email HMIS Administrator the name of your practice client for review.
 - a. Feedback will be provided on your results with any required corrections that are needed.
4. You will then receive the **HMIS Policies and Procedures Quiz**.
 - a. Email this document when complete to the HMIS Administrator.
5. You will then receive an **End User Agreement** to sign and to have your Manager/Director sign.
 - a. Email this document when complete to the HMIS Administrator.
 - b. Documents will be reviewed and checked for any needed corrections.
6. *Access will be given to the LIVE HMIS Database.

Additional training can be provided as needed. Please email requests to hmis@co.shasta.ca.us.

Report Training

(To be completed after Part TWO Training is complete)

*All Users

1. Complete **Report Training Video Module 1** at <https://www.norcalcoc.org>:
 - 1) Report Training for All Users
2. Email HMIS Administrator an APR report.
3. HMIS Licensed User will receive a Certificate of Completion.

*HMIS Agency Lead Users Only (1 User Per Agency)

1. Complete **Report Training Video Modules 1-3** at [Shasta County Housing & Community Action - HMIS Resources](#)
 - 1) Report Training for All Users
 - 2) Data Completeness Report for HMIS Lead User
 - 3) Data Incongruity Report for HMIS Lead User
2. Email HMIS Administrator an ART Report 252 and 220 and an APR report.
3. HMIS licensed lead user will receive a Lead Certificate of Completion.

User Activity Review

All end user accounts are subject to a 90-day activity review. If an end user does not login to HMIS within a 90-day period, their access will be deactivated. This access can be reactivated by the Agency's HMIS Lead emailing the HMIS Administrator: hmis@co.shasta.ca.us. The request must include the user's information and the reason as to why the end user had not logged into ServicePoint within the prior 90 days and why the user still needs access. All end users that have been deactivated for 6 months or more must attend additional training.