



New HMIS User Setup Instructions

For a new user to gain access to the HMIS the following steps must be completed:

1. User completes training (Online Completed or In-Person Scheduled)

All users must complete a course that teaches them how to navigate the HMIS database and how to complete programmatic assessments and any programmatic-related functionality. To do this, all users can attend either an online or an in-person training session. To register for training please follow the below instructions:

Online Training

BOS Users

- Go to <https://community.solari-inc.org/homeless-management-information-system/> & click “Online Training.”
- Select desired training course(s)
- To access training videos, use the “Click Here” links to be routed to SurveyMonkey, and follow the prompts to complete training.
- To download documents related to the training topics, use the “Download Documents” button.

Maricopa Users

To access HMIS training, individuals must have a user account for the CoC Learning Gateway. These links can be used to [LOGIN](#) or [REGISTER](#).

For an individual to gain access to the CoC Learning Gateway, their organization **must have** a license allocation. Otherwise, they may get an error message that says registration is “blocked because it does not belong to an allowed domain.” The organization must fill out the CoC Partner Survey to resolve this issue. MAG staff then contacts the agency to allow accounts with their email domain to create new accounts in the LMS.

In-Person Training

- Go to <https://community.solari-inc.org/homeless-management-information-system/> & click “In-Person Training.”
- Click and register for the Training of your choice.

2. User initials & signs the HMIS Code of Ethics

All new users must sign the Code of Ethics before gaining access to HMIS (pages 4-5 of this Packet).

3. **Agency Administrator** completes the New User Information Form

The agency admin or agency contact must complete the New User Information Form for each new user that requires access to HMIS (page 3 of this Packet).

4. The Agency Administrator submits a “New User Request” ticket [on the HMIS Support Website](#).

Within the ticket, you must attach the completed New User Packet (pages 3-5 are required). Tickets can be submitted by clicking “Submit a Ticket” on this page: <https://community.solari-inc.org/submit-a-ticket/>.



New HMIS User Setup Instructions

5. HMIS staff will review the packet and provide login instructions

HMIS staff will only accept complete packets. If incomplete or incorrect information is submitted, HMIS staff will let the requestor know what needs to be completed. HMIS staff then will close the ticket and await a corrected packet to be submitted via a new ticket.

Online Training Descriptions

HMIS Introductory Training (Intro): The HMIS Introductory Series is the basic course every HMIS user needs to take. This covers the essential items including login, searching for clients, and entering client information.

Case Management Training (CM): The Case Management Series covers items such as creating case goals, recording case notes, entering services, or sending referrals for clients. This course will teach users how to leverage HMIS for case management.

Coordinated Entry Training (CE): The Coordinated Entry training covers all data entry requirements for coordinated entry and is relevant to users from Maricopa and the Balance of State. It covers multiple workflows including data entry for coordinated entry and housing providers responding to referrals. The link will guide you through which videos to watch. Simply click "yes" or "no" for the questions as applicable.

Outreach (OUT) / RHY / HOPWA / SSVF / PATH: **These courses are designed for users who must enter data to satisfy the requirements of specific grant types.** This course will cover how to enter the client into HMIS, enter client information, and discuss grant-specific data elements.

ShelterPoint Training (SHPT): The ShelterPoint training covers how to enter and exit clients from the ShelterPoint module which is frequently used by Emergency Shelters. Users will be trained to locate the module, enter clients, exit clients, and perform basic ShelterPoint functions.

Online Training Requirements & Recommendations

X = required

O = optional/encouraged

M = required only for Maricopa

	Intro	C-19	CM	CE	OUT	RHY	HOPWA	SSVF	PATH	SHPT
Emergency Shelter	X	M	O	O						O
Transitional Housing	X	M	O	O						O
Rapid Rehousing	X	M	O	X						O
Permanent Housing	X	M	O	X						O
PATH	X	M	X	O	X				X	
Outreach	X	M	X	O	X					
HOPWA	X	M	X		O		X			
SSVF	X	M	X	X	O			X		O
RHY	X	M	X	O	O	X				O



New HMIS User Setup Instructions

New User Information Form

Agency Name		<input type="checkbox"/> BOS <input type="checkbox"/> MAR
User Legal Name		
Job Title		
Email Address		
Phone Number		

HMIS Access Information

User Responsibilities	<input type="checkbox"/> Case Manager (Data Entry) OR <input type="checkbox"/> Auditor (Read Only) <input type="checkbox"/> Agency Admin (Data Entry, View Entire Agency Data, Password Resets)	<input type="checkbox"/> SAP BO License (Generate Reports)
<p>List the project ID number for all projects that the user will enter data into. (ex. 14514)</p> <p>Or the project full name of the project, as it appears in HMIS. (ex. HMIS High Risk)</p>	<ul style="list-style-type: none"> • _____ • _____ • _____ • _____ • _____ 	

HMIS Training Scheduled or Completed (required)

- This user has already completed the required online training as of (what date):** _____
- What is the name of the online training completed:** _____
- This user has signed up for live training scheduled on:** _____
 (If selecting live training, users will receive login credentials when they attend training)
- The Code of Ethics is signed and included in the packet.**

I authorize this user to access the HMIS system. I have reviewed their code of ethics and have confirmed that they have completed the training necessary to complete their work in HMIS.

 Supervisor (or HMIS Primary Contact/Agency Admin) **Name**

 Supervisor (or HMIS Primary Contact/Agency Admin) **Signature** Date



New HMIS User Setup Instructions

Code of Ethics for Persons Using the HMIS

User Name: _____

As a user (agency staff or agency volunteer) of the HMIS who enters information into the HMIS or views electronic information in the HMIS, I agree to the following: (Please initial)

_____ I understand that my User ID and Password give me access to the HMIS.

_____ My User ID and Password are for my use only and I will not share, or allow them to be shared, with any person for any reason.

_____ I will take all reasonable means to keep my User ID and Password physically secure to prevent its use by any other person.

_____ I understand that the only individuals who can view the information in the HMIS are authorized users and the clients to whom the information pertains.

_____ I understand that not all users can view all information.

_____ I will only view, obtain, disclose, or use the database information that is necessary to perform my job.

_____ If I am logged into HMIS and must leave my work area for any length of time; I must log off the HMIS and close the Internet browser before leaving the work area.

_____ A computer with the HMIS open and running shall never be left unattended by the person authorized to use that computer.

_____ Failure to log off the HMIS appropriately may result in a breach of client confidentiality and system security.

_____ I will obtain and file a hard copy of such client consent forms as are required by my agency, state and/or federal law, and the HMIS.

_____ I understand that I must save data at regular intervals because the system will log off at 30-minute minutes without automatically saving the information I entered.

_____ I agree to enter data into the HMIS by the policies of my agency and the standards of HMIS.



New HMIS User Setup Instructions

_____ I agree that I will not enter discriminatory comments made by or about an employee, volunteer, or other person based on race, color, religion, national origin, ancestry, handicap, age, sex, or sexual orientation into HMIS. I understand that offensive language and profanity are not permitted in the HMIS system. This does not apply to the input of direct quotes by a client IF the Agency believes that it is essential to enter these comments for assessment, service, and treatment purposes.

_____ I agree to use the HMIS ONLY for business purposes related to serving the clients of my agency.

_____ If I notice or suspect a security breach, I shall immediately notify the designated HMIS Contact person in my agency or the HMIS System Administrator.

_____ As an HMIS user, I will treat other Member Agencies and their staff with respect, fairness, and good faith.

_____ As an HMIS user, I will treat clients and potential clients of my agency and other agencies with respect, fairness, and good faith in obtaining and entering their data.

_____ As an HMIS user, I will maintain high standards of professional conduct.

_____ As an HMIS user, I recognize that my primary responsibility is to my client.

_____ I understand that I may be subject to personnel action, including but not limited to termination from employment or volunteer status, from my employer for failure to comply with this Code of Ethics.

I have read, understand, and agree to comply with all HMIS-related COE statements above.

Username

Agency Name

User Signature

Date

Supervisor (or HMIS Primary Contact/Agency Admin) Signature

Date