HMIS Basic Training
2016 Syllabus

Part 1: Course Information

Instructor Information

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Course Description

This course will provide the fundamental training to using ClientTrack, Spokane's local Homeless Management Information System (HMIS) software solution. Across our community organizations are required and eager to collect, and report on their programs. In this course you will be trained as a new HMIS user and be introduced to the principles of HMIS and the fundamentals to getting started with entering clients in the system and accessing basic reports.

Topics Include:
Introduction to the concept of an HMIS
HUDs HMIS Data Standards
HMIS Security & Data Management Basics
Creation of Client Records
Workflows & Workgroups
Project Enrollments & Exits
Entering Services
Basic Client Reports

Course Materials

Required User License Agreement

- In order to access HMIS each user is required to complete a New User License Agreement. Each user will be assigned a training account and a standard user account prior to the course.

Recommended Texts & Other Readings (Not required)

- https://www.hudexchange.info/resources/documents/HMIS-Data-Standards-Manual.pdf
- https://www.hudexchange.info/resources/documents/GlossaryofHMISDefinitionsandAcronyms.pdf

Part 2: Course Goal

The goal of this course is to prepare you for using the basics of ClientTrack for your project(s). There are several learning objectives that you will meet by completing tasks through a combination of activities, exercises, and participation.

Objective 1: You Understand HMIS & Gain Access to ClientTrack

Task 1.1: Learn about HMIS and client Release of Information (ROI)
Task 1.2: Log into Production vs. Training Environment
Task 1.3: Log into ClientTrack and review Settings, Help functions & Access Issues

Objective 2: You Are Able to Create Client Information & Complete Project Workflows

Task 2.1: Review Search Functions to avoid client duplication and data tracking errors
Task 2.2: Create a new client and add household members using project workflow
Task 2.3: Identify Universal Data Elements (UDEs) and complete for each client
Task 2.4: Check and verify data entered
Task 2.5: Create anonymous client and report duplicates

Objective 3: You Are Able to Conduct Intake Assessments

Task 3.1: Identify HUD required data elements
Task 3.2: Complete assessment for client using project workflow

Objective 4: You Have the Ability to Enter and Exit Enrollments for Clients

Task 4.1: Enter and Exit a client into a specific project enrollment
Task 4.2: Entering Residential Move-In Date for RRH projects
Task 4.2: Repair or modify an enrollment
Task 4.3: Conduct enrollment quality control and troubleshooting

Objective 5: You Have the Ability to Enter Services

Task 5.1: Review menu of services
Task 5.2: Learning how to log grant/project specific services
Task 5.3: Determine units of measure

Objective 6: You Have Access to SPDATS & Workgroup Settings

Task 6.1: Confirm if you will be conducting VI-/SPDATs
Task 6.2: Locate VI-/SPDAT and select your Workgroup(s)

Objective 7: You Have the Ability to Edit & Correct Records

Task 7.1: Edit and modify family, assessments, enrollments, and services

Objective 8: You Know How to do Data-Quality Monitoring & Reporting

Task 8.1: Locate reports in ClientTrack
Task 8.2: Review report categories
Task 8.3: Run HMIS Universal Data-Quality report and review

Objective 9: You Can Implement Data Security Practices

Task 9.1: Review electronic security standards
Task 9.2: Review physical security standards

Objective 10: Support Tab