

The first part of this document contains meeting notes from the Training. The second part contains relevant Q&As from the webinar session.

## Notes

### 1.) Introduction

#### a. Reminder before continuing:

- i. Attendees are **responsible to share what they've learned with their agencies.** (At registration you were asked to sign in by agency for recordkeeping)
- ii. Availability of recording
  1. Link to be sent with the recorded webinar. Also, a short quiz ONLY for those who did not attend in person. **Those agencies that could not attend have until 01/05/18**

### 2.) CHANGE: Ticketing Portal is now REQUIRED

- a. Starting Jan 01, requests sent to Help Desk email will be returned and not completed until a ticket is opened
- b. Once a ticket is started, continue the conversation via email (ticket # in subject line)

### 3.) UPDATE: Identify Your HMIS Primary Contact

- a. Each agency is required to identify an "HMIS PRIMARY CONTACT" and email the HMIS team
- b. The Primary Contact
  - i. Submits data quality questions
  - ii. Approves new users
  - iii. Handles agency accounting questions
  - iv. Handles agency workflow questions
  - v. Handles agency ethics questions
  - vi. Is able to disseminate information exactly where it needs to go (e.g. handling the billing of licenses)
  - vii. Does NOT have to be an Agency Admin (Can be Case Manager, CEO, anything in between)

### 4.) UPDATE: Training Opportunities

- a. The following formats of training opportunities are available
  - i. **Self-Service Training**
    1. Online  
Website → Training Tab → Link to Training & Quiz
    2. In-Person  
Website → Training Tab → Eventbrite
  - ii. **Custom Training**
    1. Online  
Website → Ticket Portal → Custom Training Request
    2. In-Person  
Website → Ticket Portal → Custom Training Request

### 5.) UPDATE: New User Setup Process – *FEEDBACK REQUESTED!*

1. User **completes** training (online or in-person)
2. User signs Code of Ethics
3. Supervisor (or HMIS Primary Contact) completes New User Information Form
4. Agency creates a New User Ticket on HMISAZ.ORG
5. HMIS staff reviews for completeness and verify request
6. HMIS staff sends user login information



- 6.) CHANGE: Data Quality Policies Regarding 0252 & 0640
  - a. We **STRONGLY RECOMMEND** ALL agencies to run Data Quality reports 0252 and 0640 monthly before the 5<sup>th</sup>
  - b. HMIS staff will run them monthly on the 5th and notify agencies of Data problems starting on the 10<sup>th</sup>
  - c. HMIS staff will notify the Continuum of Care if agencies do NOT make suggested Data corrections by the end of month (for 2 months in a row)
  
- 7.) TRAINING: How to Schedule DQ Reports –
  - a. **See document, “0640 – DQ Framework (ART).pdf”**

**Q&A**

<i>Webinar Question</i>	<i>Answer</i>
<b><i>If our agency operates both in BoS and in Maricopa, should each location have a primary contact, or should we have one for the entire agency?</i></b>	There should be a primary contact for both BOS and in Maricopa. They can be the same person.
<b><i>Please say the link for the self-service online portal again?</i></b>	<a href="http://HMISAZ.org">HMISAZ.org</a>
<b><i>If we need in person training should I email?</i></b>	No. Only custom trainings require an email. All other trainings online/in-person can be completed through our self service portal. Please visit <a href="http://HMISAZ.org">HMISAZ.org</a>
<b><i>Are we able to attach docs when we submit a ticket?</i></b>	Yes you can attach documents. All new user requests require an attachment.
<b><i>Can users do training without a sign in?</i></b>	Online training can be completed without a sign in. In-person training will require a sign in. This will be given at the training.
<b><i>[All requests must start through Ticketing Portal] Is this to be effective Jan 1?</i></b>	Yes effective Jan 1, 2018
<b><i>We have a few agency administrators. Will the primary contact replace agency admins?</i></b>	No the primary contact will not replace your agency admin. The sole function of the primary contact is to get the information to the place that it needs to be.
<b><i>What is the name of the 0252 and the 0640 reports?</i></b>	0252 - Data Completeness Report Card (EE) - v17 0640 - HUD Data Quality Report Framework - v1
<b><i>Do you have to be ART certified to run the 0252 report?</i></b>	Yes, only users with an ART license can run 0252
<b><i>I am sorry if you answered this already but will this presentation be available to us after today?</i></b>	The presentation video, and the notes will be available for everyone by 12/29



12/29/2017

## December 2017 – Agency Admin Training (AAT) Notes

*During the 0640 walkthrough, why did Lawrence choose July 2017 as an end date and July 2016 as a start date as opposed to using current dates?*

This was just an example timeframe. You can run the 0252 for any timeframe. For the 0640 you'll want to run for 12 months (1 year).