

*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. Attendees are **responsible to share what they've learned with their agencies. Those agencies that could not attend have until 05/11/18 to take quiz and have it counted as attendance**

### 2.) ANNOUNCEMENT

- a. Both Maricopa and BOS HIC (Housing Inventory Chart) and PIT (Point In Time count) have been submitted

### 3.) FEEDBACK

- a. Last month's attendees asked to see the agenda earlier and request slower-paced-training
- b. Complete survey results: <https://www.surveymonkey.com/results/SM-JNZ9NF3Z8/>

### 4.) CHANGE: Forms hosted on HMISAZ.ORG

- a. New User Packet
  - i. Replaces previous forms
  - ii. Contains step-by-step explanation of the process of creating new users
  - iii. Reviews potential duties/projects of new staff (helps align proper training)
  - iv. Entire "Packet" must be completed or they cannot be processed – we will require a new one
- b. Custom Training Request
  - i. Helps us understand the nature of your training request (New project vs. new users etc.)
  - ii. Helps us to plan and create a custom training agenda

### 5.) TRAINING: How to do Sub-Assessments

- a. Income (many steps, see video)
- b. Disabilities (many steps, see video)

### 6.) PRO-TIP: How to use HUD Exchange and why that's important

- a. Subscription, and what that offers you
- b. Creating profiles
- c. Finding information
- d. Joining webinars



**Q&A**

<i>Webinar Question</i>	Answer
<b><i>When reporting on the INCOME Subassessment, do we give gross or net income?</i></b>	Record “gross” income by default, unless your funder specifically tells you otherwise
<b><i>What is the link for the HMIS test site so users can practice entering in information?</i></b>	<p><a href="https://sp5.servicept.com/arizona_training/com.bowmansystems.sp5.core.ServicePoint/index.html">https://sp5.servicept.com/arizona_training/com.bowmansystems.sp5.core.ServicePoint/index.html</a></p> <p>Your username/password should be the same as the Live site. If you need it unlocated, please submit a ticket through HMISAZ.ORG</p>
<b><i>Do emergency shelters need to fill out total monthly income?</i></b>	Yes, by default, all Emergency Shelters record this field
<b><i>How do I correct a previous error in these subassessments? Can I change a HUD Verification field that had incorrect data?</i></b>	<p>Yes. For example:</p> <p>--A user records a new client’s income at entry as \$100</p> <p>--The user learns that is incorrect – the client was actually making \$150 at entry.</p> <p>--The user goes directly to that entry, goes into the HUD Verification field, clicks the edit pencil for that line of income, changes the number from \$100 to \$150, and ensures that the start date remains the same as it was (the project entry date)</p>
<b><i>When do we click the “magnifying glass” in these subassessments?</i></b>	It is not necessary to use the magnifying glass. However, some users choose to use it to get a visual of a client’s past income amounts all on one page
<b><i>When do we click the “Add” button for these subassessments?</i></b>	Though we have taught differently in the past, <u>don’t use this button</u> because it causes more data errors than the workflow we train currently (i.e. the way we trained in today’s Agency Admin Training)