

## Missouri Balance of State Coordinated Entry Training for Access Points

Date: 8/26/2019

- 1) Steps for how to complete the MO Bos CoC Coordinated Entry training in Litmos
- 2) Steps for how to complete the HMIS MO BoS CoC Coordinated Entry training for current HMIS users and new HMIS users
- 3) Next steps for non HMIS users

### **STEP 1: LITMOS FOR MO BOS COC COORDINATED ENTRY TRAINING**

- 1) Determine what MO Bos CoC Access Point Level your agency is
  - *Access Point Level* descriptions for Access Point Levels 1, 2, 3, 4 are available on the MO BoS CoC website @ <https://www.moboscoc.org/ceforms> click on the *Access Point Level Description* tab
- 2) Contact Coordinated Entry Regional Lead to request Litmos training
  - A list of CE Regional Leads and contact info for Regions 1-10 is available on the MO BoS CoC website @ <https://www.moboscoc.org/ceforms> click on the *Regional Contacts & Case Conferencing Schedule* tab
  - Map of which counties each Region covers @ <https://www.moboscoc.org/regions>

*\*\*Please note, Coordinated Entry training in Litmos needs completed by every staff person at your agency who will be doing Coordinated Entry intake/assessment\*\**

- 3) CE Regional Lead will add you to Litmos
- 4) Provider will get an email invite with a link from Litmos
  - Please check your spam mail if you don't see it in your inbox
- 5) Provider needs to create a password in Litmos
- 6) Provider needs to complete the correct Learning Path for your Access Point Level, you will self-select the correct Learning Path, options are:
  - Level 1 – for staff at agencies who are an Access Point Level 1
  - Level 2/3 – for staff at agencies who are an Access Point Level 2 or Level 3
  - Level 4 – for staff at agencies who are an Access Point Level 4

- 7) All Access Point Levels will also complete a training in Litmos on how to complete the HMIS Release of Information

*\*Please note, this is NOT the full HMIS training – this is specifically for the HMIS Release of Info (ROI) that is part of the MO Bos CoC Coordinated Entry Intake Packet*

HMIS Password to complete the training on Vimeo: ServicePoint

- 8) If you get locked out of Litmos, please contact your CE Regional Lead for further instructions
- 9) Once you have completed all courses for your Learning Path, you can print/save your certificate (you do not need to print a certificate for each course you complete, you will want to print/save the certificate at the end that shows that you have completed your entire Learning Path for your Access Point Level)

## STEP 2: HMIS COORDINATED ENTRY TRAINING FOR CURRENT HMIS USERS AND NEW HMIS USERS

Any individual requiring access to HMIS for Balance of State (BoS) Continuum of Care (CoC) Coordinated Entry System (CES) data entry must meet all CoC required programmatic Coordinated Entry training, as well as required HMIS specific training.

To ensure these requirements have been met, the following processes will be followed for HMIS training.

### New HMIS Users Entering Data for Multiple Projects

The process below applies to new End Users that will enter data for service/housing projects, such as: financial assistance, emergency shelter, rapid rehousing, etc. **AND** their agency's MO BoS CoC CES project.

1. An Authorized Representative for the agency must submit the User Access Request form on behalf of the End User that needs HMIS training. This form is available on the ICA website @ [www.icalliances.org/missouri-forms](http://www.icalliances.org/missouri-forms)  
**NOTE:** The User Access Request form should be noted as "**New User Request**" and list all projects for which the End User will enter data for this agency. MO BoS CoC CES will **not** be an option at this point.
2. After the UAR is approved, the new End User will receive notification from our HelpDesk to:
  - a. Submit a User Policy and Responsibilities form,
  - b. Complete the Security & Privacy Awareness training, and
  - c. Complete the Data Standards Training.
3. New End Users that complete step 2 will be provided the appropriate training and practice case based on the service and/or housing projects listed in the UAR.
4. Once the practice case has been successfully completed, the End User will be referred to their HMIS system administrator who will determine if there are any additional training needs for the service/housing projects listed in the UAR and will provide user credentials once the determination is made that all training requirements have been met for those projects.
5. Upon completion of this process, the End User is now classified as a **Current HMIS User**, and will follow the process outlined below to initiate MO BoS CoC CES training.

### Current HMIS User AND New Users ONLY Entering Data for MO BoS CoC CES

1. An Authorized Representative for the agency must submit the User Access Request form on behalf of the End User that needs HMIS training for their BoS CoC CES project. This form is available on the ICA website at [www.icalliances.org/missouri-forms](http://www.icalliances.org/missouri-forms).
  - a. The User Access Request Type must be noted as "**MO BoS CoC CES**".
  - b. Indicate if this individual is a **CURRENT USER** or **NEW USER** of the HMIS.
    - i. If **NEW USER** is selected, answer **No** to the question "Will this new user have access to any other projects...". If **Yes** is selected, a message will display stating a New User Access Request form must be submitted, so the End User can complete training for other projects first.
  - c. Select the appropriate **Agency Name** from the drop-down menu.
  - d. The Authorized Representative must attach the End User's **Litmos Certificate of Completion**, and a copy of the **agency's BoS CoC CES MOU**.
    - i. The MOU must have **all three signatures**: Agency staff, CE Regional Lead, and the MO BoS CoC Board President.
    - ii. If you can't find your agency's signed MOU on Basecamp, please contact Ken Wright @ [ken.wright@mhdc.com](mailto:ken.wright@mhdc.com) to request it.
    - iii. The UAR will **not** be accepted without these documents.
- a. Select the appropriate **Access Point Level**.
  - i. It is imperative that the **correct** level is selected and that it matches what is indicated in the Litmos Certificate of Completion to ensure the End User receives the correct HMIS training.
- b. If this End User needs access to the BoS CE Assessments DQ report or Prioritization List, select "Grant this user an ART license" under Additional User Rights.

(Current Users will skip step 2 and go straight to step 3)

2. For **NEW USERS ONLY**: After the UAR is approved, the new End User will receive notification from our HelpDesk to:
  - a. Submit a User Policy and Responsibilities form,
  - b. Complete the Security & Privacy Awareness training, and
  - c. Complete the Data Standards Training.

Note: once these steps are completed, the new user will move on to step 3 below.

3. The End User will be provided training and a practice case based on the Access Point Level indicated. All End Users will be trained in setting up a new client record, in addition to one of the following modules:
  - a. Level 1: Prescreen and Mainstream Referrals.
  - b. Level 2-3: Prescreen, Entry, Interim Mainstream Referrals and Exit.
  - c. Level 4: Prescreen, Entry, Interim, Mainstream/Housing Referrals and Exit.
4. Once the practice case has been successfully completed, the End User will be referred to their HMIS system administrator who will determine if there are any additional training needs and will provide user credentials once the determination is made that all training requirements have been met.
  - a. Level 4 End Users will receive additional training on how to run and filter the HMIS Prioritization List via Vimeo video and a written guide.

### **Once HMIS training is complete, begin entering data!**

Staff should enter the Prescreen, Coordinated Entry Intake Packet/VI-SPDAT information into HMIS within 3 business days of completing paperwork with each client that agreed to share their information in HMIS.

## **STEP 3: NEXT STEPS FOR NON HMIS USERS**

- 1) Email your Regional Lead to let them know that you have completed your Coordinated Entry training in Litmos
- 2) Agencies who are not HMIS users but have Coordinated Entry intakes/client data that needs entered into HMIS will need to sign an MOA for a data partnership with an agency who can enter data into HMIS on their behalf
  - A sample MOU is available on the CoC website @ <https://www.moboscoc.org/ceforms>, please click on the *Sample HMIS Data Entry Partnership Agreement* tab
- 3) For client data to be added to HMIS, staff need to send data to their HMIS data partner ASAP so that data can be entered into HMIS within the 3 business-day time frame. Each data partner will work out best practices for how data should be sent – ex: via secure email, fax, in person, etc.
- 4

### **OTHER NOTES:**

#### **MO BoS CoC Coordinated Entry MOU**

If you do not have a signed MOU to participate in MO BoS CoC Coordinated Entry, you can complete one:

- The MOU is available on the CoC website @ <https://www.moboscoc.org/ceforms>, please click on the *Coordinated Entry Memorandum of Understanding* tab
- Agencies will need to sign the MOU and send to the Regional CE Lead for their signature (who will send to the MO BoS CoC Board President for signature, then CoC will upload the signed document to Basecamp)

If you have questions, please contact your MO BoS CoC CE Regional Lead or you can contact:

LeAndra Bridgeman, MO BoS CoC Coordinated Entry Chair @ [lbridgeman@necac.org](mailto:lbridgeman@necac.org)

Amy Hopper, MO BoS CoC Coordinated Entry Co-Chair @ [ahopper@daeoc.com](mailto:ahopper@daeoc.com)

Thank you,

MO BoS CoC Coordinated Entry Subcommittee