Homeless Management Information System (HMIS) Training Guide

This resource is prepared by technical assistance providers and intended only to provide guidance. The contents of this document, except when based on statutory or regulatory authority or law, do not have the force and effect of law and are not meant to bind the public in any way. This document is intended only to provide clarity to the public regarding existing requirements under the law or agency policies.

HMIS Training Guide Overview

The creation of this Training Guide aligns with the US Department of Housing and Urban Development (HUD) Office of Special Needs Assistance Programs (SNAPS) Data Strategy first strategy to *"Improve the capacity of people setting up, operating and benefitting from data systems."* The Continuum of Care (CoC) Program interim rule established the responsibilities for CoC oversight of an HMIS, including ensuring the HMIS is administered in compliance with requirements prescribed by HUD. The HMIS Data Standards set forth the data collection requirements, and Federal Partners establish reporting requirements from HMIS for their funding sources. Therefore, as stated in the System Administrator Checklist, one of the key responsibilities of an HMIS Lead or HMIS System Administrator is to develop and implement a regular training plan for HMIS users that ensures all required HMIS users have received training and orientation on regulations pertaining to their funding, software data entry and capabilities, security, privacy, and HMIS policies and procedures of the CoC; and report generation.

How to Use This Guide

This guide outlines introductory and advanced training concepts for HMIS users, as well as learning objectives for specific HMIS training content and assessment of the skills and knowledge intended to be gained by the training concepts. This guide can be used to help HMIS Leads and HMIS System Administrators standardize the HMIS Training curriculum where it overlaps with general knowledge, skills, and abilities required to effectively operate HMIS. There are local needs and resources in each CoC's HMIS implementation that will require local customization, but the introductory and advanced HMIS training concepts outlined in this guide can be a starting point for developing locally customized HMIS training plans.

Introductory HMIS Training

The following section outlines the basic concepts that may be considered part of an overall HMIS training plan.

Training Content Area	Learning Objective	Assessment Ideas
HMIS Security & Privacy Policies & Procedures	Understand Program Staff/HMIS User role in maintaining client data security and privacy policies. Understand security & privacy procedures locally (including ROI & visibility settings) to ensure secure and private HMIS per local policies.	Quiz on key concepts of Security & Privacy Policy. Quiz on key procedures to follow in certain events (breach, etc.). Sign HMIS User Agreement.
Installing HMIS Software/accessing internet-based HMIS platform	Successfully install HMIS on a local machine for staff use, or access the internet-based platform. Overview of procedure to gain access on new computers or request additional user licenses.	HMIS Software installed on local machine/Successfully accessed internet-based HMIS.
Logging into HMIS (first and subsequent attempts)	Successfully log into HMIS multiple times. Successfully log into HMIS on a local machine. Overview of procedure to request username/password changes.	Log into HMIS Software both in the training session & on a local machine.
Accessing help desk services	Successfully contact HMIS help desk services	Contact information for the help desk service is known.
Overview of Federal Partners	Understand the role that Federal Partners play in HMIS Data Standards & help users know if they are funded by any Federal Partner.	Review current Federal Partners & Data Collection Guidance. Pre-requisite could include knowledge of funding sources prior to training attendance.
HMIS Data Elements Overview	Understand PDDEs (overview & in relation to HMIS User organization/role), UDEs & Common PSDEs (in detail), Federal Partner Data Elements (in general), and Metadata Elements (in general). Specific coverage of traditionally problematic elements (Housing Move-In Date, Prior Living Situation, etc.)	Quiz on details of UDEs and PSDEs. Quiz on Federal Partner element requirements for HMIS User's particular project. Quiz on how to correct any PDDE or Metadata deemed "wrong".
Data Collection Overview	Data collection from start to finish, including question/element phrasing and conducting assessments from a trauma-informed perspective as well as an equity lens; entering clients into HMIS, including stages of data collection/data quality expectations, differences of data collected by project types, searching, sharing, saving,	Test client entered into HMIS as deemed "correctly" by the trainer. Case studies/case examples can be provided with expected reporting results achieved after successful data collection. Significant time may be allotted to HMIS Users during this part of the training session for accuracy and error corrections.

Training Content Area	Learning Objective	Assessment Ideas
	starting projects, adding updates, adding services, fixing data errors, exiting projects, and aftercare data collection (if any)	
Project-Specific Data Collection	Focus on specific special requirements for projects like Night-by-Night Shelters, Rapid Rehousing, and Coordinated Entry	Case studies in different project type data collection needs.
Required Reporting Overview	Run HUD Required, Locally Required, and Case Manager/Client Management specific local reporting.	Specific reports with expected results are produced. Suggest tying case studies from Data Collection Overview to HUD Data Quality (Glossary) reporting or other local Data Quality reporting.
Ad Hoc Reporting Overview	Understand the procedure for requesting ad hoc reports until such time that HMIS User is trained (in an advanced training) to generate ad hoc reports locally.	HMIS User knows the procedure for accessing ad hoc reports from HMIS Lead staff.
Intro to Data Literacy and Data Quality Management	Review CoC Policies and Procedures for data quality assurance and data literacy objectives	Review current Federal Partners & Data Collection Guidance. HMIS User knows where to access CoC Policies and Procedures and Data Quality Management Plan (DQMP).

Advanced HMIS Training

The following section outlines the advanced concepts that may be considered part of an overall HMIS training plan. Advanced concepts may be reserved for program staff with elevated management, supervisory, or quality assurance responsibilities. Also, consider access levels when determining training content so that what the user is trained on in an advanced training can actually be accessed by their level of permission to features in the software. Many HMIS implementations have up to three or more user access levels to cover HMIS end users, agency administrators or program managers, and HMIS Lead staff. Additional levels of training or access may be used as incentive to excellent data quality as an entry-level user or may fill a need the CoC has for assistance with administrating the system.

Training Content Area	Learning Objective(s)	Assessment Ideas
Data Quality Policies & Procedures	Understand local CoC policies for review, improvement, and reward for high data quality in the timeliness of data entry, completeness of data, and accuracy of data. Understand the procedure for correcting/updating HMIS User data quality statistics as reported. Roles and Responsibilities of key CoC and HMIS staff are reviewed.	Quiz on timeliness, accuracy, and completeness benchmarks for CoC. HMIS Users have a clear understanding of key data quality points for CoC, and how to address data quality issues should they arise. A review of user data entry data quality is completed and areas for improvement are identified.
Ad Hoc and other Advanced Reporting	How to generate ad hoc reports and/or other advanced reporting features in the system.	Create a list of example queries with known results and have the user create queries.
Project Setup	Review funding sources/project type templates/bed & unit setup.	Project Setup tool use.
Managing Users	Understand HMIS End User Agreements and the requirements therein, including how to assess for compliance.	Check your local system to see how users are interacting with your HMIS.
Managing Projects	Understand Organizational Agreements, best practices for project setup, and how to assess for compliance.	Review the setup process in place for new projects—create a new project request system.
Project-Level Reporting	How to interpret project-level reports—get to client-level detail to see which clients make up the aggregate numbers in reports.	Ability to get to client-level details of reports in HMIS—export and manipulate.
System-Level Reporting	Understand SPMs and LSA—how project setup impacts these reports—ability to set up reports in your HMIS.	Review of PDDEs—and the impact they have on system-level reporting.
Train the Trainer	Understand an effective train the trainer system that could work in your community.	Review of best practices: Allowing local training with an online test. Only allowing training from organizations with a quality assurance infrastructure.
Creating a culture of data literacy	Understand, and use, local context when conducting HMIS trainings. Explain why HMIS data is important to ending homelessness, including providing a data management lifecycle from data collection to reporting and analyses.	HMIS Users have an understanding of how data collected impacts the entire system, using local examples.

Good Practices

Developing and regularly updating a training plan as part of the HMIS Policies & Procedures is considered a good practice. Logistics such as curriculum content, size of the audience, length of time to deliver materials, and opportunities for hands-on experience may be considered before training plans are finalized. Multiple training options available by content, setting, intended audience, and other factors may be a necessity for a comprehensive training plan.

Learning management systems (LMS) which not only provide a platform for online training delivery but may also help with administrative functions like registrations, attendance tracking, evaluations (to ensure users have the necessary skills), and pre/post work can be purchased and are considered a good practice. However, many LMS are expensive and require regular oversight/maintenance to be used effectively. A thorough search and selection process should be undertaken if an LMS is being procured.

Training modalities should also be considered to offer the most efficient and impactful HMIS trainings. Different approaches to delivering training via different modalities can include self-directed services like an LMS or individualized in-person or remote training which can be one on one or in small groups. Each of these approaches will take different amounts of effort and resources. Additional information can be found in the HUD training session Improving Your Training Curriculum and Delivery.

Adult learning theories and principles may be considered when planning for HMIS trainings. Examples include:

- Adults should have a say in the content and process of their learning.

- Focus learning on adding to what they already know and have experienced.

- Content should be focused on issues related to their professional responsibilities.

- Learning should be centered on problem-solving rather than memorizing content.

HMIS Leads and System Administrators may choose to research the different ways in which adults learn and enhance their training techniques to take these differences into consideration. Effective adult learning techniques may include ways to be conscious of the length of training and frequency of breaks provided, the interactivity tools used to provide hands-on learning opportunities, and other means of engaging the adult learner to ensure the most effective retention of concepts and material.

Eligible HMIS Costs

HMIS is an eligible project component under both the Emergency Solutions Grant (ESG) and Continuum of Care (CoC) programs and providing trainings to staff on using HMIS are eligible activities for both programs. Recipients and subrecipients who contribute data to an HMIS may use funds under the HMIS eligible cost to pay the expenses related to contributing data to the HMIS designated by the CoC for the area. These costs can include purchasing software or software licenses (such as an LMS or a helpdesk) and paying salaries for training staff on using the HMIS or comparable database.