Training Site URL: [HCIS Demo Site](https://sp5.servicept.com/homeward_demo/com.bowmansystems.sp5.core.ServicePoint/index.html)

**Before training, please review the following information linked below. Please sign and scan a copy of the User Policy and Code of Ethics to** [**aoverby@harrisonburgrha.com**](mailto:aoverby@harrisonburgrha.com)

* **User Responsibilities/Important Documents**
  + [HCIS Policies and Procedures](https://irp.cdn-website.com/5f4255d0/files/uploaded/HCIS_Policies_and_Procedures_09022020.pdf)
  + [User Policy and Code of Ethics](https://irp.cdn-website.com/5f4255d0/files/uploaded/User-Policy-and-Code-of-Ethics-for-HCIS-Users-120617.pdf)
  + [Client Privacy Notice](https://irp.cdn-website.com/5f4255d0/files/uploaded/Privacy-Notice-120617.pdf)
  + [Written Authorization for Release of Information (ROI)](https://irp.cdn-website.com/5f4255d0/files/uploaded/HCIS_Release_of_Information_030520.pdf)
  + [Verbal Authorization for Release of Information (ROI)](https://irp.cdn-website.com/5f4255d0/files/uploaded/NEW-Verbal-Release-Script-120617.pdf)
* **Understanding What Kinds of Data are Collected**
  + [Universal Data Elements](https://www.hudexchange.info/programs/hmis/hmis-data-and-technical-standards/#elements) – establish unique, unduplicated records and determine status of chronically homeless
  + [Program-specific Data Elements](https://www.hudexchange.info/programs/hmis/hmis-data-and-technical-standards/#program) – information about services provided and client outcomes

1. **Navigating the Database**
   1. Log into the [training website](https://sp5.servicept.com/homeward_demo/com.bowmansystems.sp5.core.ServicePoint/index.html)
   2. Top Banner
      1. Home Project Name
      2. Enter Data As
      3. Back Date
      4. Helpful icons
   3. Left-hand menu
      1. Home
      2. ClientPoint
      3. ResourcePoint
      4. Reports
      5. Admin
      6. Logout
   4. Customize Home Page Dashboard
2. **ClientPoint**
   1. **Client Search**
      1. Find a client and go to record
      2. Find no record of client and create new record
   2. **Client Profile**
      1. Client Profile
         1. Edit Client Record/Demographics
         2. Add Client Notes/File Attachments/Incidents
      2. Households
         1. Single-person households
         2. Adding members to household
      3. ROI
         1. Add ROI for single person
         2. Add ROI for all members of household
      4. Assign Case Manager
      5. Case Plans
         1. Add Goal
      6. Assessments
         1. VISPDAT
   3. **Entry/Exit**
      1. **Entry – Day 1**
         1. Reviewing and adding Universal Data Elements
         2. Reviewing and adding Program-Specific Data Elements (HUD Verification)
         3. Adding family members to Entry (if necessary)
      2. **Add Interim/Annual Assessment/Update – As more information is collected**
         1. Annual Assessments vs. Updates
      3. **Exit – The Last Day**
   4. **Service Transactions**
      1. Add Service
      2. Add Referral
3. **Reports**
   1. Data Quality Framework
   2. Client Served Report
   3. CoC-APR 2019