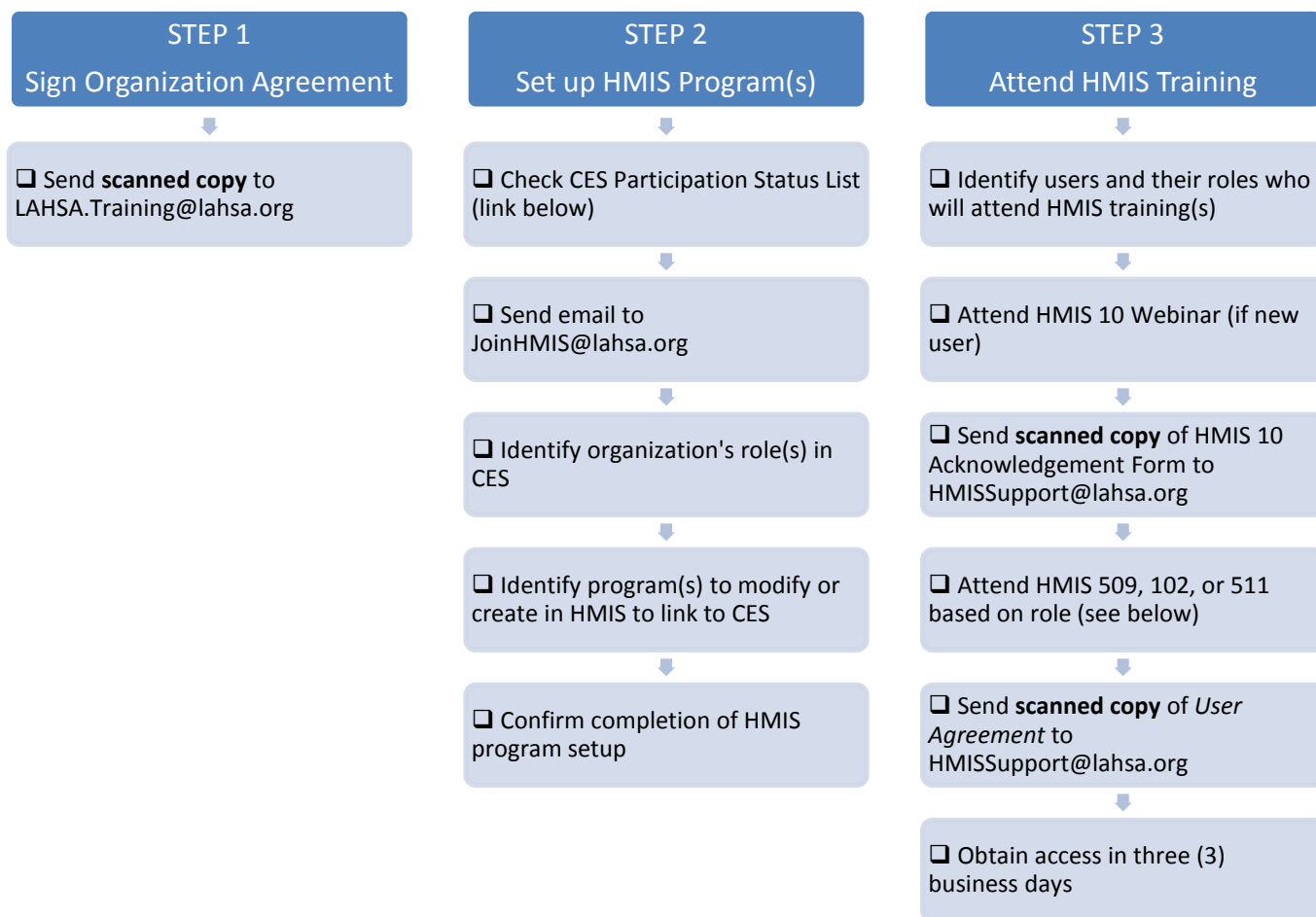# Los Angeles Homeless Services Authority
a joint powers authority of the city & county of los angeles

HMIS Coordinated Entry System (CES) Participation Procedures

Purpose

This document intends to inform organizations wanting to participate in HMIS for CES on all of the steps necessary for users to access the system.

How to join HMIS for CES and gain User Access

STEP 1	STEP 2	STEP 3
Sign Organization Agreement	Set up HMIS Program(s)	Attend HMIS Training

STEP 1

❏ Send **scanned copy** to LAHSA.Training@lahsa.org

STEP 2

❏ Check CES Participation Status List (link below)

❏ Send email to JoinHMIS@lahsa.org

❏ Identify organization's role(s) in CES

❏ Identify program(s) to modify or create in HMIS to link to CES

❏ Confirm completion of HMIS program setup

STEP 3

❏ Identify users and their roles who will attend HMIS training(s)

❏ Attend HMIS 10 Webinar (if new user)

❏ Send **scanned copy** of HMIS 10 Acknowledgement Form to HMISSupport@lahsa.org

❏ Attend HMIS 509, 102, or 511 based on role (see below)

❏ Send **scanned copy** of *User Agreement* to HMISSupport@lahsa.org

❏ Obtain access in three (3) business days

Note: *Please note that Step 1 and Step 2 must be completed prior to Step 3 for users to be provided HMIS access, please see below for details.*

STEP 1: Sign Organization Agreement

1. Executive Director or Authorized Representative signs the *Organization Agreement* and sends a **scanned copy** to LAHSA.Training@lahsa.org.

Note: The CoC Representative section should be left blank for LAHSA to fill out. Only the Executive Director/Authorized Representative section should be signed by the Organization.

STEP 2: Set up HMIS Program(s)

1. Program Manager (or those knowledgeable about the program(s) at the organization) checks *CES HMIS Implementation List* for status of their organization's access to HMIS.

2. Program Manager contacts LAHSA's HMIS Implementation Team at JoinHMIS@lahsa.org to implement/modify the organization's program(s) to allow access to CES Tools.

3. Program Manager identifies the organization's role(s) in the CES process. The organization's role defines which programs will be set up. The organization's role in the CES process may include one or more of the following:

ORGANIZATION ROLE	DESCRIPTION
Assessment Only	Organization has staff that surveys clients with no other services provided
Housing Navigation/Case Management	Organization has staff that surveys clients and provides housing navigation services
Housing Provider	Organization has staff that completes housing vacancy forms and manages housing resources

4. Program Manager identifies the organization's HMIS programs to be modified or created with the HMIS Implementation Team as necessary. Main program types involved in CES are listed below:

PROGRAM TYPES	DESCRIPTION
Assessment Only	Program where users only survey clients with no other services provided
Access Center and/or other supportive services program	Program where users survey clients and provide various supportive services (including referrals to supportive services)
Outreach	Program where users perform street outreach to track outreach contacts and engages clients by completing the survey, and provides various outreach services (including referrals to supportive services)
Emergency Shelter or Transitional Housing	Program where users survey clients and provide bed services as bridge housing and other services

			(case management, referrals, etc.)
Permanent Housing	Program where housing provider users provide permanent housing resources to CES by adding vacancies and tracking occupancy (no setup modification of the program is needed for Permanent Housing programs)

5. Program Manager confirms the program setup when LAHSA's HMIS Implementation Team follows up upon completion of the program setup to confirm validity.

STEP 3: Attend HMIS Training

1. Program Manager identifies users who will attend training and their individual roles. The individual's role depends on the program(s) that are set up in HMIS. A user may have one or more of the following roles (in order of least access to most access):

ROLE \ ACCESS	HOUSING PROVIDER	ASSESSMENT ONLY	HOUSING NAVIGATOR/CASE MANAGER	OUTREACH	COMMUNITY COORDINATOR	COMMUNITY MATCHER
Enter CES Survey		X	X	X	X	X
Provide Housing Navigation Services			X	X	X	X
Provide Case Management Services			X	X	X	X
View Client Prioritization List			X	X	X	X
View Housing Resource List	X		X	X	X	X
Manage Client Prioritization List					X	X
Manage Housing Resource List	X				X	X
Enter Vacancy Form	X				X	X
Provide Services prior to CES Survey				X		

Note: *If the user has more than one role, they will receive the highest, appropriate level of access, depending on their role.*

2. Individual user registers for the HMIS Training based on their role at the [HMIS Training Website](#) and attends the training.

PROGRAM TYPE	INDIVIDUAL ROLE	TRAININGS TO ATTEND	HMIS ROLE PROVIDED
Permanent Housing	Housing Provider	HMIS 511 Webinar (1 Hour)	CES_Housing_Provider
Assessment Only	Assessment Only	HMIS 10 Webinar (if new user; 3 Hours)	CES_Assessments
		HMIS 509 (3 Hours) - First Half	
Access Center and/or other supportive service program **Emergency Shelter** **Transitional Housing**	Housing Navigator/Case Manager	HMIS 10 Webinar (if new user; 3 Hours)	CES_Standard
		HMIS 509 (7 Hours) - Full Class	
Outreach	Outreach	HMIS 10 Webinar (if new user; 3 Hours)	CES_Outreach
		HMIS 102 (3 Hours)	
Any Program Type	Community Coordinator	HMIS 10 Webinar (if new user; 3 Hours)	CES_Coordinator
		HMIS 509 (7 Hours) - Full Class	
Any Program Type	Community Matcher	HMIS 10 Webinar (if new user)	CES_Matcher
		HMIS 509 (7 Hours) - Full Class	
		HMIS 510 Webinar	

NEW USERS ONLY: *All new users must create a login to the [HMIS Training Website](#) to register for any HMIS Trainings.*

3. NEW USERS ONLY: Upon completion of HMIS 10, individual user must sign a *HMIS 10 Acknowledgement Form* and send a **scanned copy** to HMISSupport@lahsa.org.

4. Individual user must sign a *[User Agreement](#)* and send a **scanned copy** to HMISSupport@lahsa.org.

5. Upon completion of the training and receipt of all necessary forms, the user will be provided with HMIS access within **3 business days**, dependent on the number of account requests.

Last Revision: 06/18/2015

References and General Contact Information

Relevant Links and Contact Information below:

- CES Participation Status List

- Organization Agreement

- User Agreement Form

- HMIS 10 Acknowledgement Form - Users will be provided the form upon registering and completion of HMIS 10

- HMIS Main Website

- HMIS Training Website

- HMIS Document Library

- JoinHMIS@lahsa.org - Main inbox for HMIS Implementation

- HMISSupport@lahsa.org - Main inbox for HMIS Support, including account/password issues, training registration

- LAHSA.Training@lahsa.org - Main inbox for HMIS Training

LAHSA Staff

This process involves the following LAHSA staff:

- Monica Gudino, Senior Data Analyst. Primary staff responsible for new program implementation and modification.

- Pada Lee, Business Systems Analyst. Secondary staff responsible for new program implementation and modification.

- Julia Warren, HMIS Trainer/Support Specialist. Primary staff responsible for creating training materials and performing in-class and webinar training courses.

- Wendy Huynh, HMIS Trainer/Support Specialist. Secondary staff responsible for creating training materials and performing in-class and webinar training courses.

- Carrisa Bush, IT Department Administrative Admin. Primary staff responsible for creating, updating user information and access to send to users.

Last Revision: 06/18/2015