DETROIT HMIS ONBOARDING CHECKLIST

Agency Onboarding and Project Setup Request

Complete New Agency Application

❑ Complete the **New Agency Application** form for each project entering data

IMPORTANT NOTE: This document (pgs. 2-7) must be completed for each project that will be entering data in the HMIS. The first page only needs to be completed once (unless there is a change in the info for each project).

Submit Project Set Up Helpdesk Request

Once you have completed the application form, you will need to submit a help desk request to have your project(s) set up in the HMIS. The helpdesk ticket and associated attachments will provide HAND with the additional information needed to move forward with your request.

❑ Go to HAND's HMIS Support Portal (helpdesk) at https://hmis.handetroit.org/portal
❑ Add Ticket and select '**Program Bin Requests'** for the Layout and **'Adding a New Program / Agency'** for the HMIS Ticket Type.
❑ Complete the remaining fields (subject, contact info, details, etc.) related to your request and attach your completed agency application to your request before submitting your ticket.

HMIS Governance Agreements

Complete HMIS Agreements

❑ Sign the three agreements listed below and return to Viki DeMars (viki@handetroit.org)

❑ **Administrative QSOBAA**
❑ **Interagency Sharing QSOBAA**
❑ **MSHMIS Participation Agreement**

Submit Project Set Up Helpdesk Request

Once you have signed the agreements, you can submit them through a helpdesk request.

❑ Go to HAND's HMIS Support Portal (helpdesk) at https://hmis.handetroit.org/portal
❑ Add Ticket and select '**Program Bin Requests'** for the Layout and **'Adding a New Program / Agency'** for the HMIS Ticket Type.
❑ Complete the remaining fields (subject, contact info, details, etc.) related to your request and attach your signed forms to your request before submitting your ticket.

User Licensing and Training Requirements

Determine Licensing Needs & User Roles

❑ Determine who will enter data, who will run reports and who will be designated to serve as the HMIS Agency Administrator.

IMPORTANT NOTE: Each agency must designate a staff member to serve as the Agency Administrator (HMIS contact) for the agency. For a full list of Agency Administrator and End User Responsibilities, please refer to the Detroit CoC HMIS Policies and Procedures document located on HAND's website.

❑ Determine the number of HMIS licenses needed (see [HMIS Fee Schedule](#)) located on HAND's website to determine associated costs, if applicable.

IMPORTANT NOTE: The HMIS Basic setup includes 1 HMIS User license. Additional HMIS Licenses would need to be purchased in accordance with the HMIS Fee Schedule.

Complete Required HMIS Trainings

❑ Have the Agency Administrator and all end users complete the User Licensing Training Requirements outlined in the [HMIS Training Grid](#) located on HAND's website. Be sure to download and save the training certificates for each training completed.

IMPORTANT NOTE: The training guide outlines courses that must be completed at the Michigan HMIS training site http://www.hmislearningcenter.org. New users should look for the row that aligns with the role they will fulfill at their agency. Each page outlines which of the trainings HAND HMIS staff will need to see documentation for before licensing credentials will be released.

❑ Have each new user carefully review and sign the User Agreement/Code of Ethics document

IMPORTANT NOTE: This document must be signed by the end user, the Agency Administrator and the Agency Executive Director (or other Designated Authority).

❑ Complete the **New User License Worksheet** for each user. This worksheet provides the User License Details and confirmation of the License Requirements that have been met in order to grant the license.

*NOTE: The **New User License Worksheet** form can be found on HAND's website at https://handetroit.org/hmis.*

Submit New User Helpdesk Request

*Once the requirements have been met, a helpdesk ticket will need to be submitted **(for each user)**. These helpdesk tickets along with the attachment (New User License Worksheet and User Agreement/Code of Ethics doc), will provide HAND with the additional information needed to move forward with setting up the user licenses in the HMIS.*

❑ Go to HAND's HMIS Support Portal (helpdesk) at https://hmis.handetroit.org/portal
❑ Add Ticket and select **'User License Requests'** for the Layout and **'Adding a New End User License'** for the HMIS Ticket Type.
❑ Complete the remaining fields (subject, contact info, details, etc.) related to your request and attach the completed **New User License Worksheet** and fully executed **User Agreement/Code of Ethics** document to your request before submitting your ticket.