Calgary Homeless FOUNDATION

HMIS ServicePoint

Agency Administrators

Calgary HMIS Initiative

Ensure Accuracy, Completion & Integrity of Data in HMIS ServicePoint

Table of Contents

Introduction

What is the Calgary HMIS?

The Calgary Homeless Management Information System (HMIS) is a web based, electronic Client management information system providing a standardized assessment of Client needs, individualized service plans and service records. The Calgary community utilizes the HMIS to understand the nature of homelessness, develop policies and initiatives to address homelessness, and coordinate case management services. The Calgary HMIS is a product of WellSky Community Services™ and is managed by the Calgary Homeless Foundation (CHF).

Your Role as the Agency Administrator

As the Agency Administrator you are the main contact for communication between the HMIS team and your organization/program. As the key contact you will be responsible for, but not limited to:

1. Maintaining Users: password resets, user information, etc.
2. Maintaining your Provider profile and settings
3. Distribution of information to the user base
4. Data quality assurance
5. Internal HMIS key contact for questions at your organization (Super User)

You may be required to run Advanced Reporting Tool (ART) Reports. If so, please contact the HMIS team to schedule an ART Training session.

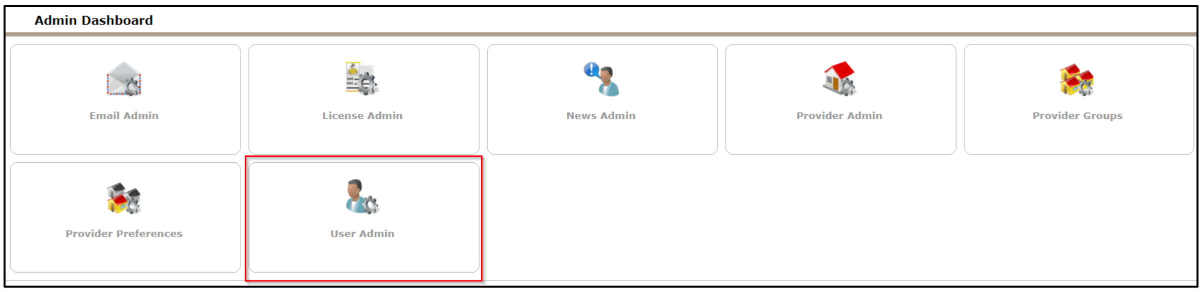
Purpose of this Manual

This manual will provide Agency Administrators with step-by-step instructions for each responsibility listed above.

User Admin

Introduction

The User Admin function is where Agency Administrators can access and edit HMIS User profiles:



Pre-qualifications of an HMIS User

Users must perform the following tasks prior to gaining access to ServicePoint™:

1. Attend an HMIS User Training session (the training schedule can be found here: http://calgaryhomeless.com/hmis/hmis-training/)
2. Read and understand the Policies and Procedures document (http://calgaryhomeless.com/content/uploads/Policies-and-Standard-Operating-Procedures-Effective-July-2016.pdf)
3. Obtain and fill out the User Agreement (http://calgaryhomeless.com/content/uploads/HMIS-User-Agreement-1.pdf)
4. Sign and submit the User Agreement to the HMIS Team via email (hmis@calgaryhomeless.com)

Once the above requirements have been met the HMIS team will create the User in the ServicePoint™ database based on the submitted User Agreement. The user will receive a notification of their username and temporary password, along with instructions to log into the system.

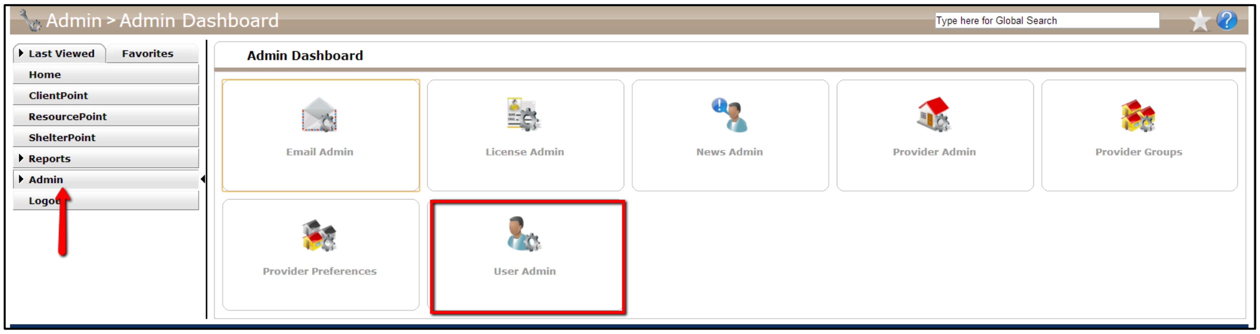
If there is a new employee at your agency who has previously completed the above requirements, email the HMIS team and request a new User profile under your agency by submitting an HMIS User Agreement. Ensure to include their first and last name and which program(s) they must have access to.

We strongly suggest that Users new to an agency attend HMIS User Training again if:

- The User does not have experience working in a Housing First program
- The User has not accessed ServicePoint™ within a year or more

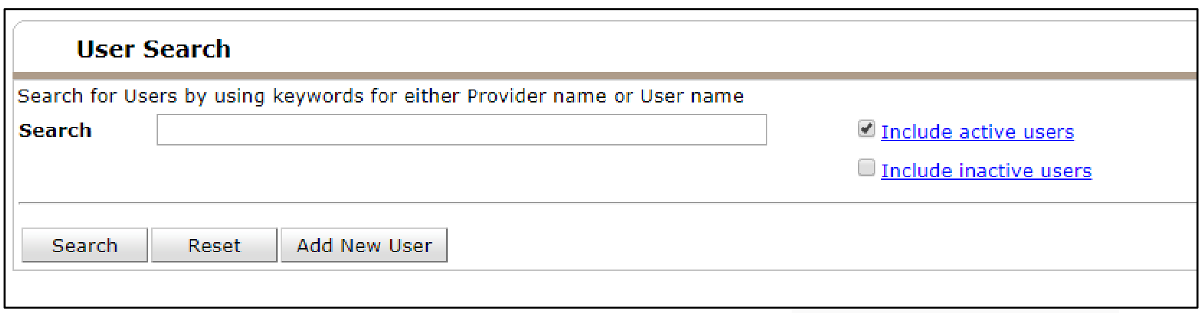
Accessing the User Admin Function

Take the following steps to access the User Admin function:



1. Click the Admin module
2. Click User Admin

You will be directed to the User Search interface that can be used to access the User Account:



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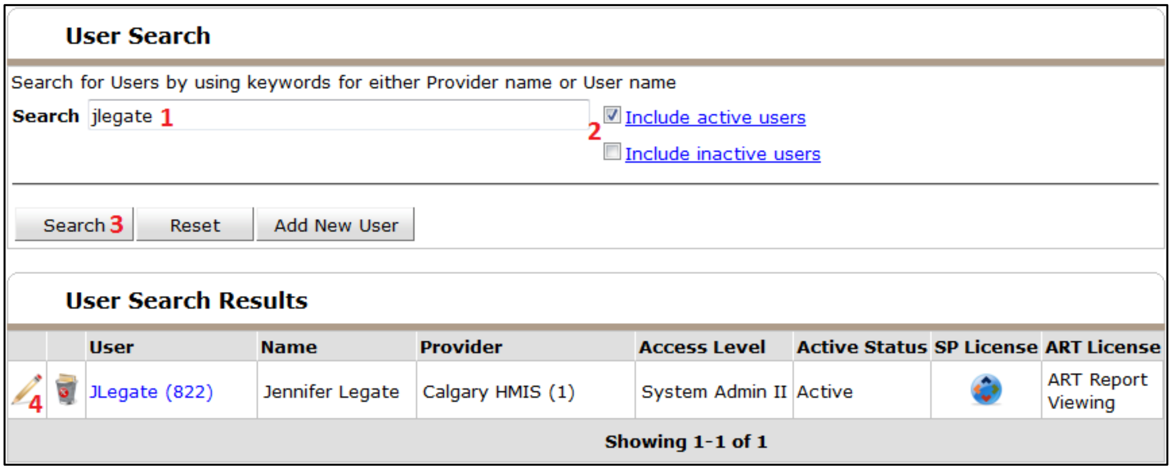
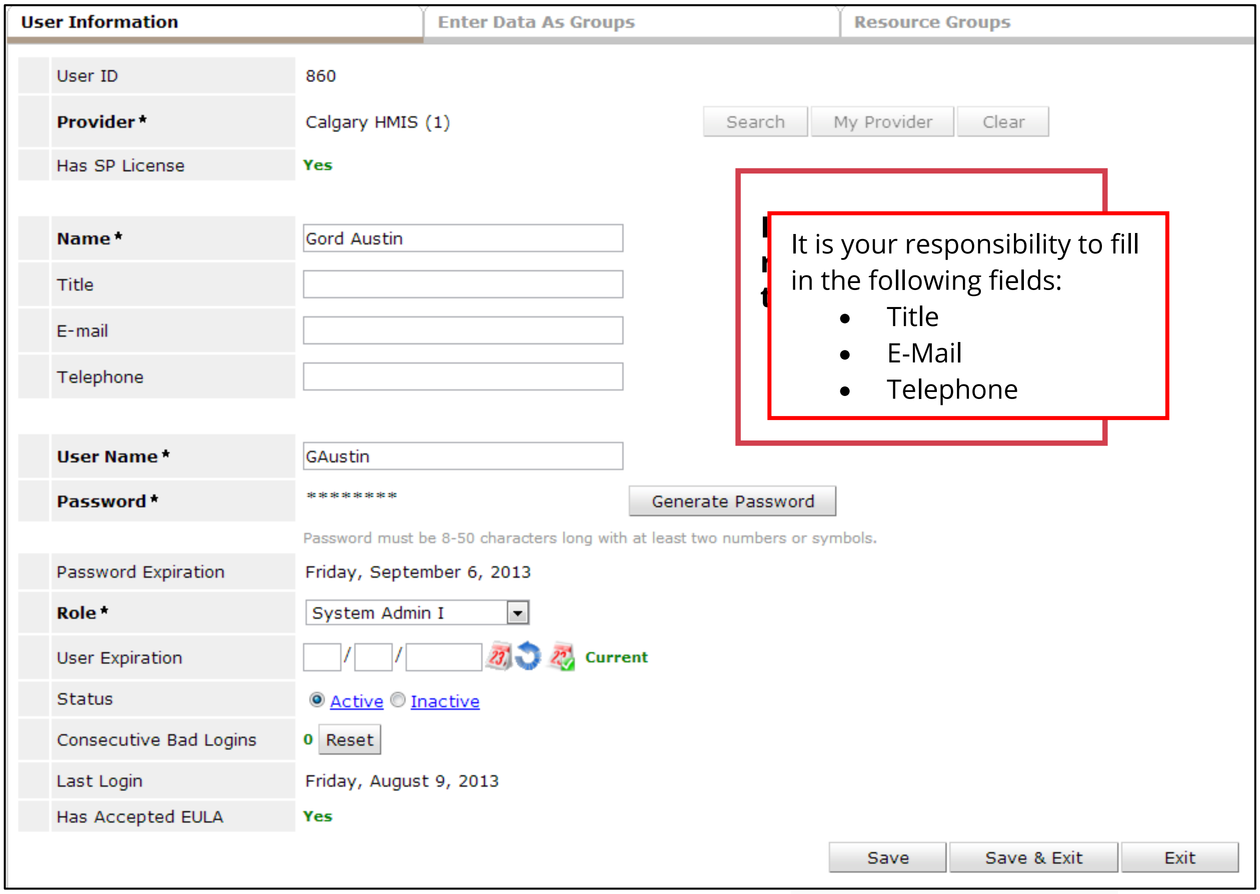
Opening a User Account



1. Type any of the following search parameters into the Search text box:
    - First and/or last name of the User (full or partial)
    - Username (full or partial)
    - Provider (all the users for that Provider will appear)
2. Click the appropriate check boxes to include active users and/or inactive users
3. Click Search and search results will appear in the User Search Results section at the bottom of the screen
4. Click the Pencil icon to open the User Account

Editing a User Account

User Information Tab



Any data field that is **bold** and accompanied by an asterisk (*****) is a required field and must be populated. Required fields are populated by the HMIS Team when Users are created.

General

- **User ID** – Unique number automatically generated by ServicePoint™ to identify a User. This cannot be changed.
- **Provider** – The default Provider (Agency or Program) that the User was built under. This cannot be changed.
  - If the User was built under the incorrect Provider contact the HMIS team to adjust the default provider
  - If the User was built under the correct provider and requires access to other programs within your Agency please refer to the Adding a Provider to a User Account section.
- **Has SP License** – Indicates whether or not the User has a ServicePoint™ licence assigned to their record. Consult with HMIS team about attaching a license.
- **Name** (full name); **Title**; **Email; Telephone** – Populate these fields with accurate and current information about the User.

The information populated here will appear for the User in the Case Management areas of ServicePoint™

- **User Name** – This is the log-in name used by the User. The format for User names is as follows: First letter of first name followed by full last name (i.e. John Doe's User Name is JDoe).
- **Password Expiration** – The date that the User's password will expire and must be changed (the system will prompt the User to change their password when this occurs).
- **Role**: Agency Admins do not have the ability to assign a Role to a User. Upon creation of the User the HMIS team will assign the role to reflect what is indicated on the User Agreement form. The most commonly used roles are:
  - 'Case Manager II' – General access.
  - 'Agency Admin'- Provided once the User has received Agency Administrator Training.
- **User Expiration** – This tool can be used when there is a temporary user/employee to ensure that their access is removed on a certain day. Set the relevant date using the calendar tool.
- **Last Login** – Reveals the last time that the User logged into ServicePoint™
  - This can be used as a monitoring tool.
- **Has Accepted EULA** – Reveals if the User clicked 'Yes' on the ServicePoint™ terms that appear the first time they log-in.

Code Sets and Settings & Special Permission sections

Please do not change any of these settings. These are pre-populated by the HMIS Team when the User is created.

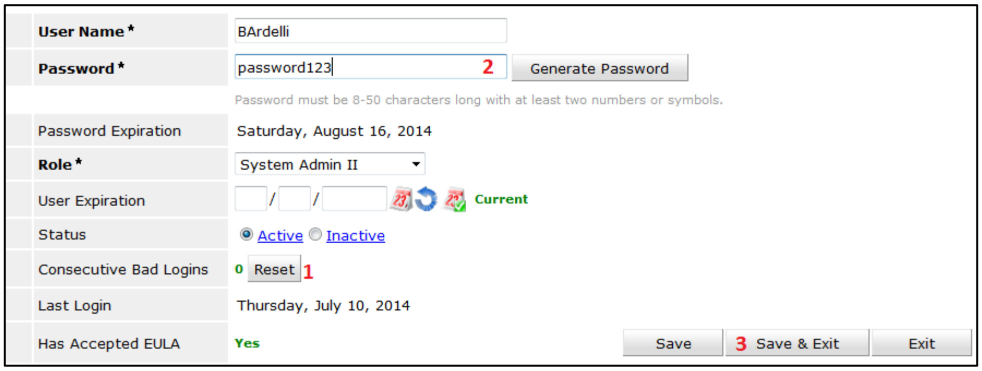
User Licences

This section will allow you to see whether or not the User has a User Licence or Advanced Reporting Tool (ART) Licence. **Please do not assign a license**. Upon creation of the User, the HMIS team will assign a license.

> **NOTE: Licenses are applied to the User upon completion of specific requirements (see Pre-qualifications of an HMIS Users above). Please see (LICENSING AGREEMENT) for more details about your licenses.**

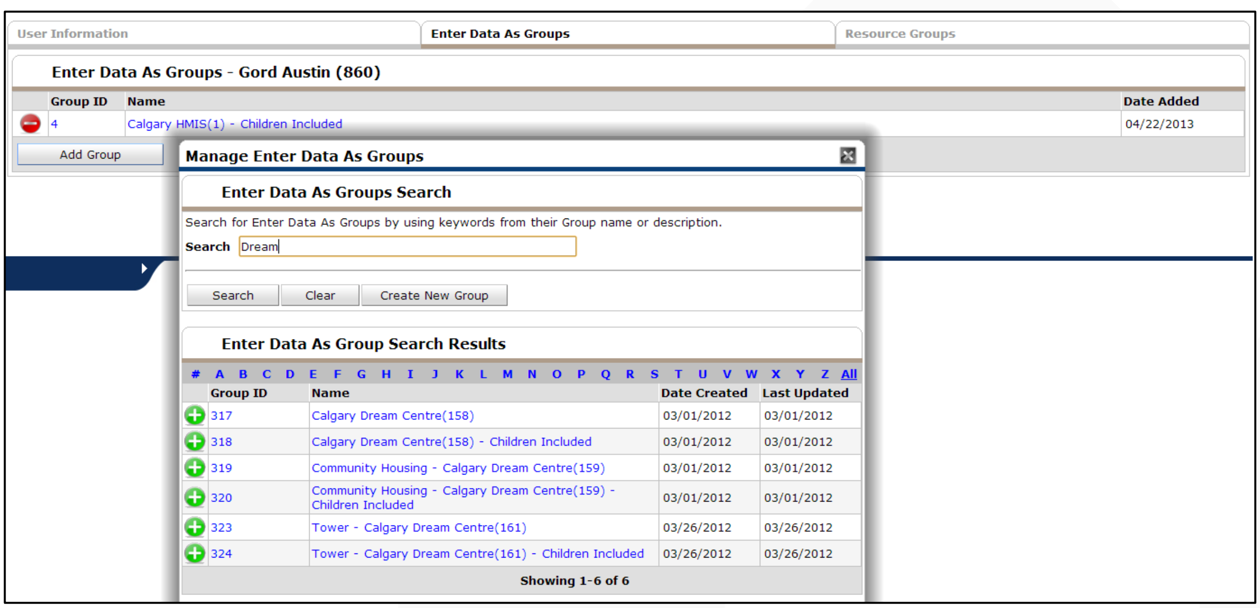
Resetting a User's Password

A User can attempt to log-in unsuccessfully up to a maximum of three times. The number of unsuccessful login attempts appears in red in the Consecutive Bad Logins field. To reset a User's password access the User profile and take the following steps:



1. Click Reset in the Consecutive Bad Logins field – the number should become a green zero
2. Click Generate Password in the Password* field and enter a new temporary password (example: password123)
3. Click Save or Save & Exit
4. Inform the User that you have reset their password and what the temporary password is. The User will be prompted to change their password the next time they login

Passwords are case sensitive

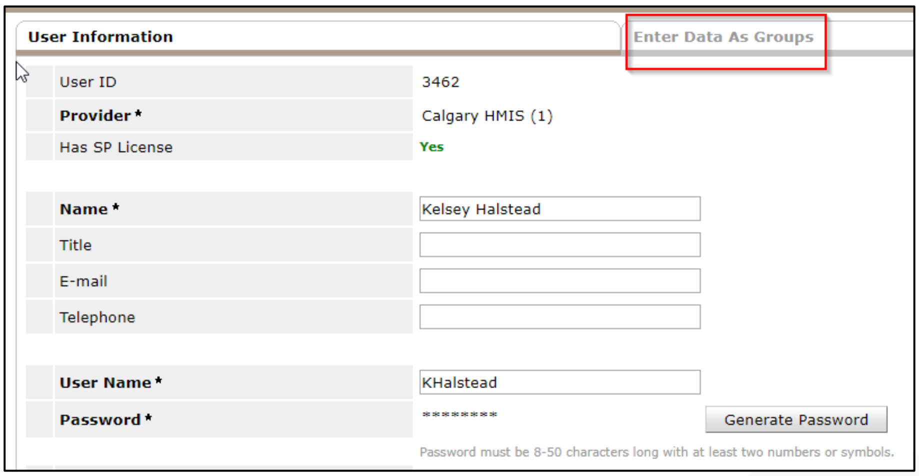


Adding a Provider to a User Account

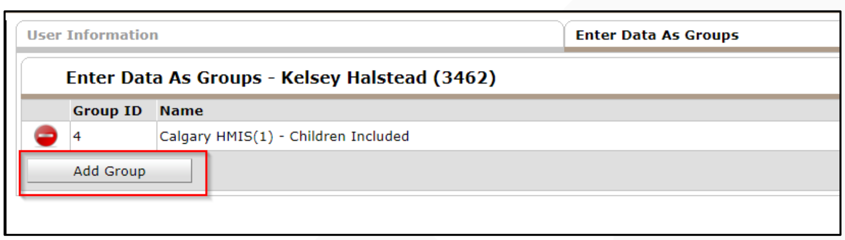
A User is created under a specific default Provider which can be an Agency or Program. Users are only permitted to enter client data on behalf of that primary default Provider.

In some cases, an Agency with more than one Program will want their Users to enter data on behalf of more than one Program and the relevant Program will need to be added to that User's profile on the **Enter Data As Groups** Tab. To do this access the User's profile and take the following steps:

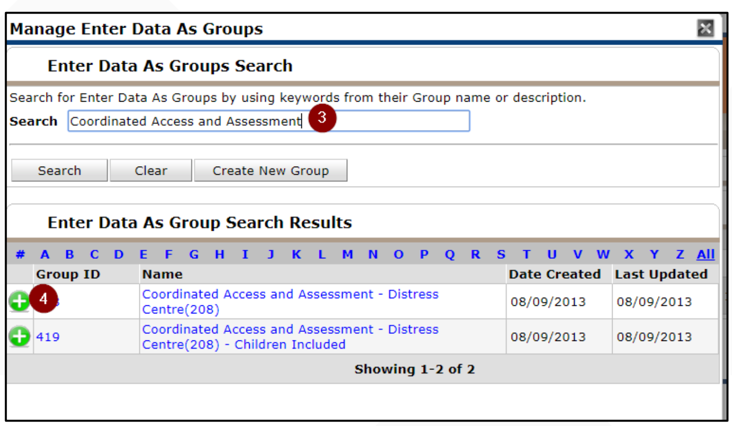
1. Click the Enter Data As Groups Tab



2. Click Add Group



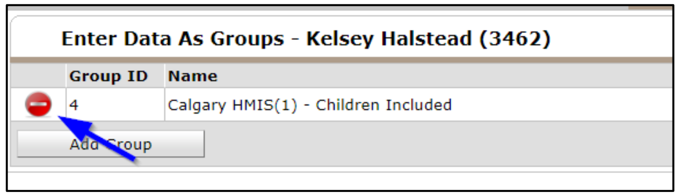
3. Search for the relevant Provider (Search results will appear at the bottom of the search window)
4. Click the green plus icon to add the Provider
5. Repeat Steps 2-4 for as many Providers as necessary



The added Provider(s) will appear in the Enter Data As Groups list. The User will now be able to switch to any of these Providers when they click the Enter Data As button while accessing ServicePoint™.

Deleting a Provider from a User Account

If a User no longer requires access to a certain Provider (Program), remove the User from that Program by clicking the red minus icon in the Enter Data As Groups tab.



You will not be able to delete the default provider the User was built under. Contact the HMIS team to complete this work for you.

Inactivating and Deleting a User Account

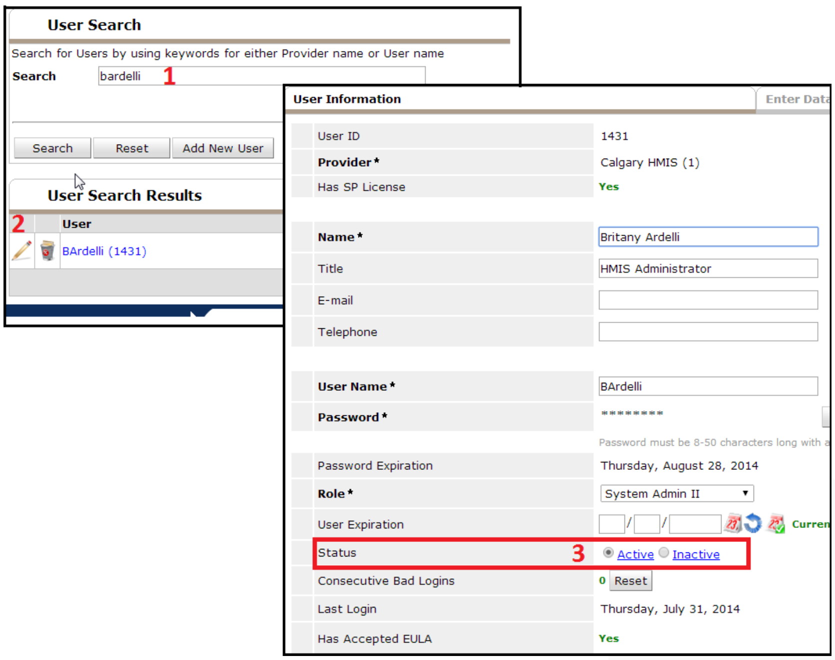
When a User is created they are automatically assigned 'Active' status and the User will have full access to ServicePoint™ based on the role that they are assigned.

A User may need to be inactivated if they are leaving their position for a short period of time with the intention of returning to that position (i.e. maternity leave). Inactivating the User's account will eliminate access to the User until their account is reactivated. If the User is leaving and not returning to their position (i.e. employee resignation), their User profile must be deleted.

NOTE: Inactivating a User will not recycle their User License. This can only be achieved by deleting the User.

Inactivate/Activate a User's profile

1. Search for the User
2. Open their account for editing
3. Change status by either:
    - Clicking 'Inactive' in the **Status** field to inactivate
    - Clicking 'Active' in the **Status field** to activate

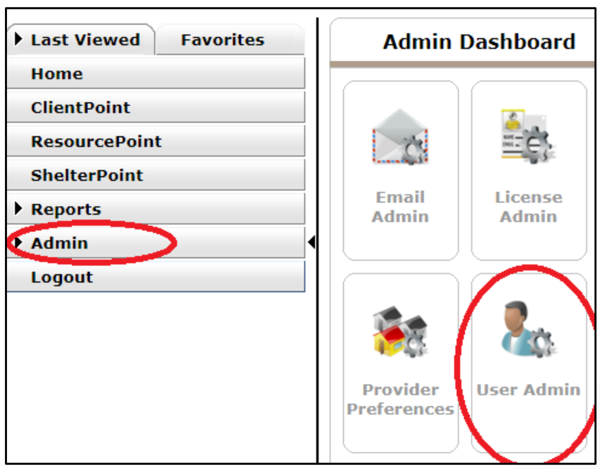


Deleting a User's profile

In accordance with the ***Privacy Policy*** and ***User Policy, Responsibility Statement, and Code of Ethics User Agreement (HMIS)*** please ensure that the User profiles of Agency staff member(s) who ***<u>no longer require usage</u>*** of their accounts are **deleted**.

To delete a User profile, complete the following steps:

1. Access the User Admin Tab
   i. Click on the Admin module
   ii. Click User Admin



2. Search for the User you would like to delete
3. Click the Garbage Can icon next to their name

The User's license will be recycled back into your program.

NOTE: Deleting a user <u>will not</u> erase their historical data.

If you do not have the permissions required to delete Users, please email hmis@calgaryhomeless.com

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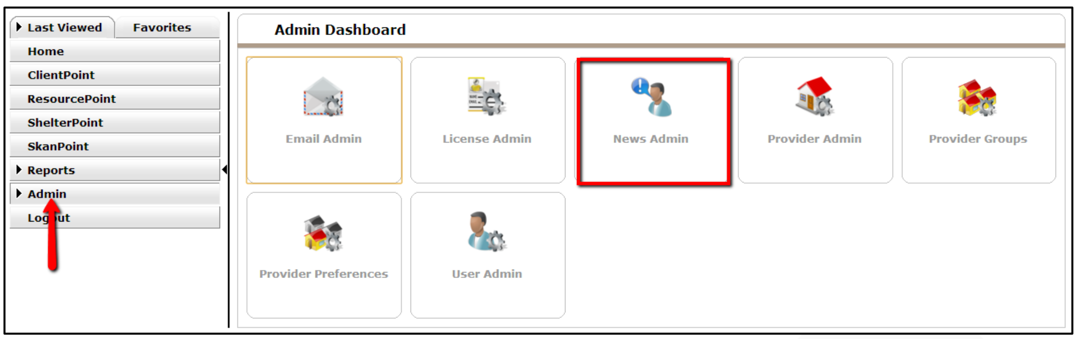
News Admin

Introduction

The News Admin function is where Agency Administrators can add relevant news items to their Agency. This information can be viewed by **all** HMIS Users in the Agency News section of their Home page.

Accessing the News Admin Function

1. Click the Admin module (left hand side of the screen)
2. Click News Admin

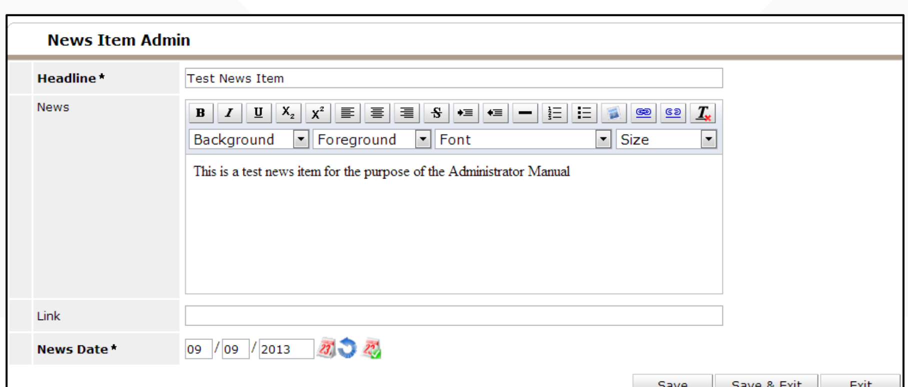


You will be directed to the News Administration interface where current Agency News are displayed. From this interface you can add, view, edit and/or delete news items.

Adding News Items

1. Click Add News (upon clicking Add News you will be directed to the Agency News interface)

2. Enter the Headline (Subject)
3. Enter news information into the News text field
4. Apply formatting options using the toolbar
5. Enter a Link (if necessary)
6. Add a News Date
7. Click Save & Exit



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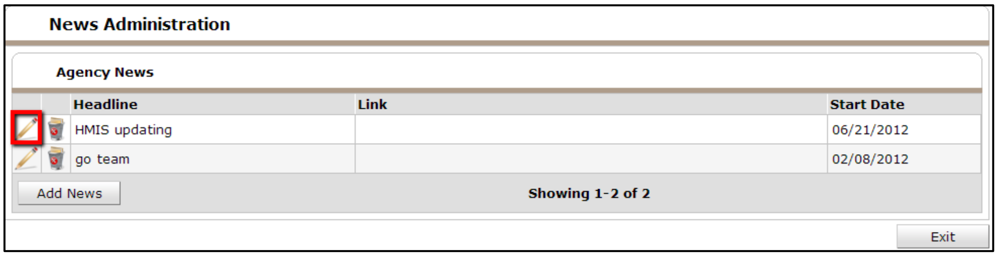
Editing Existing News Items

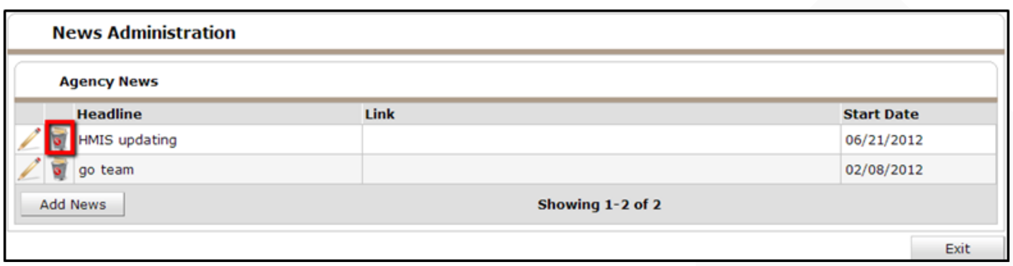
1. In the News Administration interface, click the pencil icon for the relevant news item you would like to update



2. Edit the fields as needed
3. Click Save & Exit

Removing News Items

1. In the News Administration interface, click the Garbage Can icon beside the news Headline



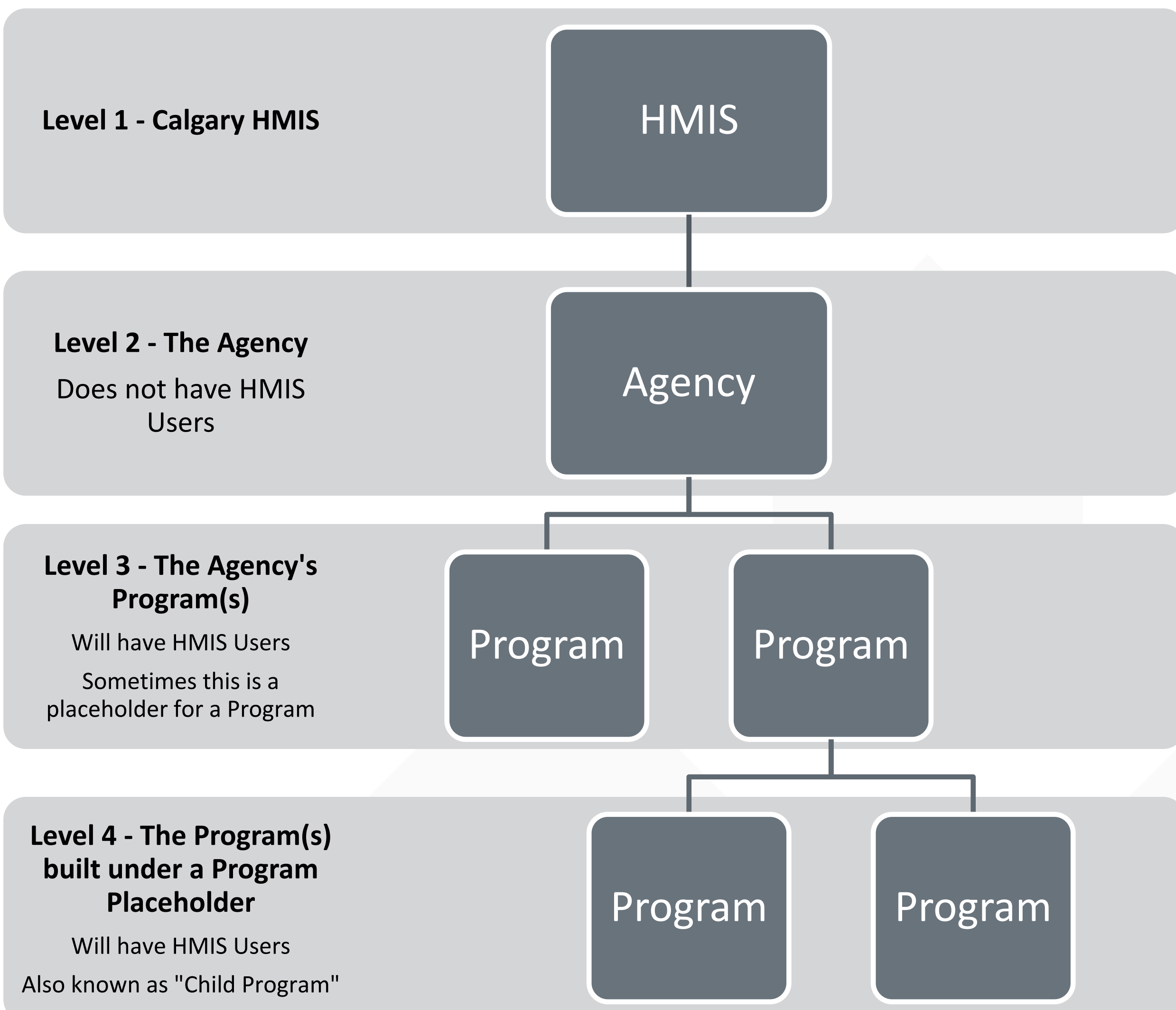
Provider Admin

Introduction

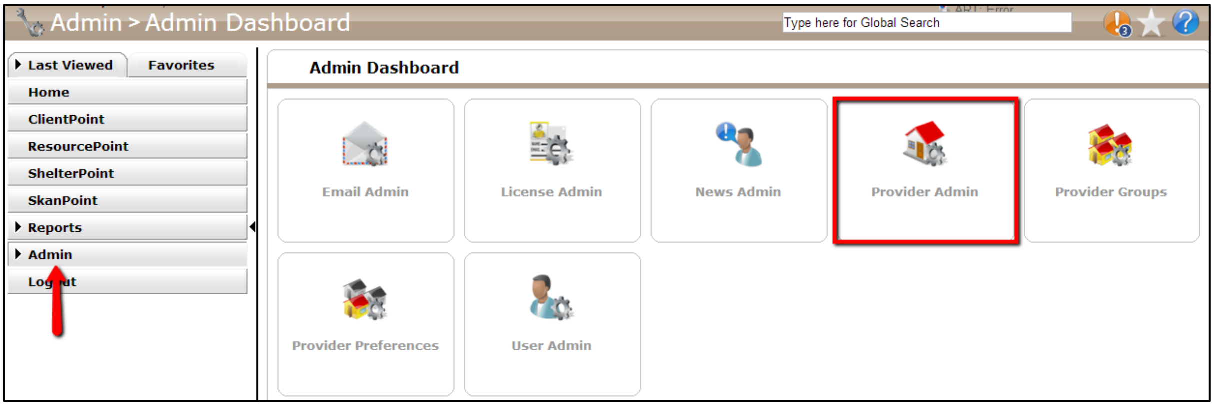
The Provider Admin function is where Agency Administrators can update the details of their Program. It is important to keep this profile up-to-date to reflect current Program information. Up-to-date profiles will help other Programs as they search for alternative programs for their client(s).

Provider Information

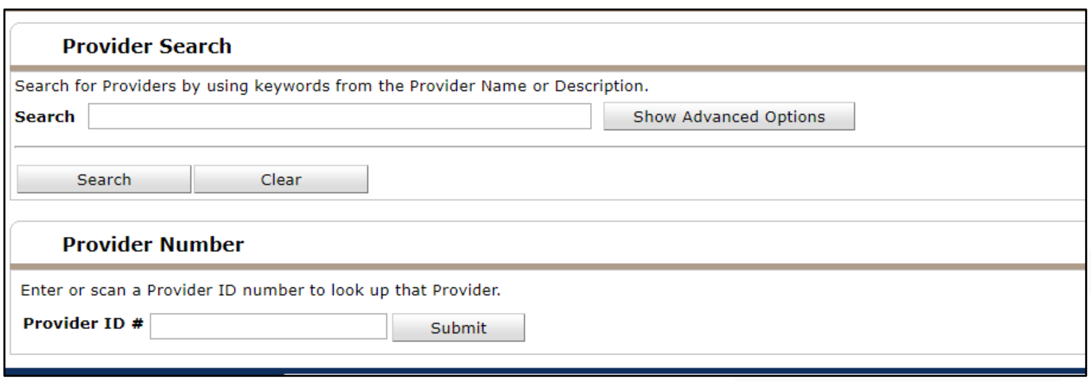
Providers are created based on a tiered level system ranging from 1 to 4. The levels are as follows:



Accessing the Provider Admin Function



1. Click the Admin module
2. Click Provider Admin
3. You will be directed to the Provider Search interface where you can search for the Provider Account you wish to access:



NOTE: You will only see the Providers that you have access to as an Agency Administrator

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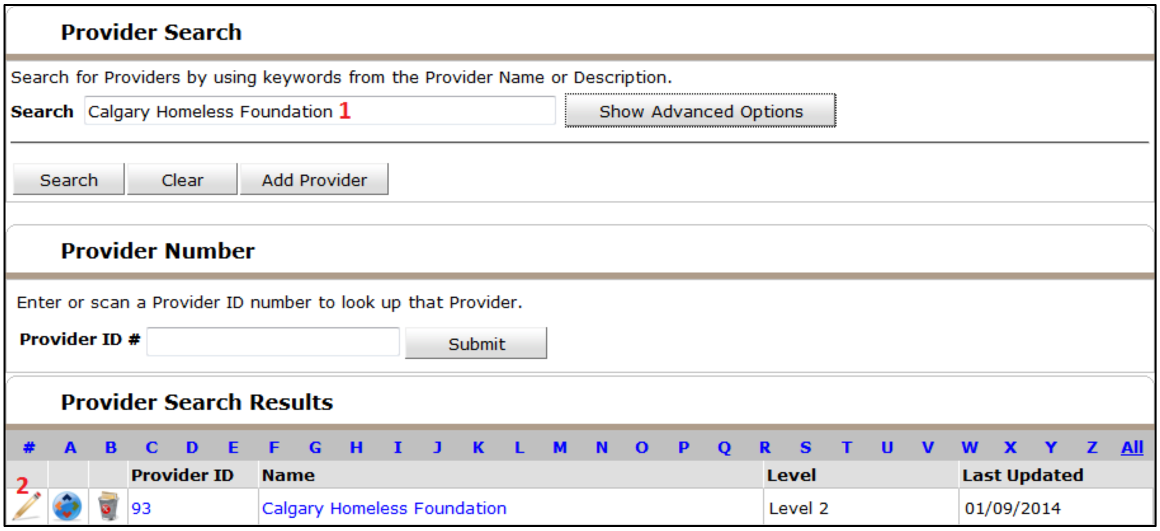
Opening a Provider Account

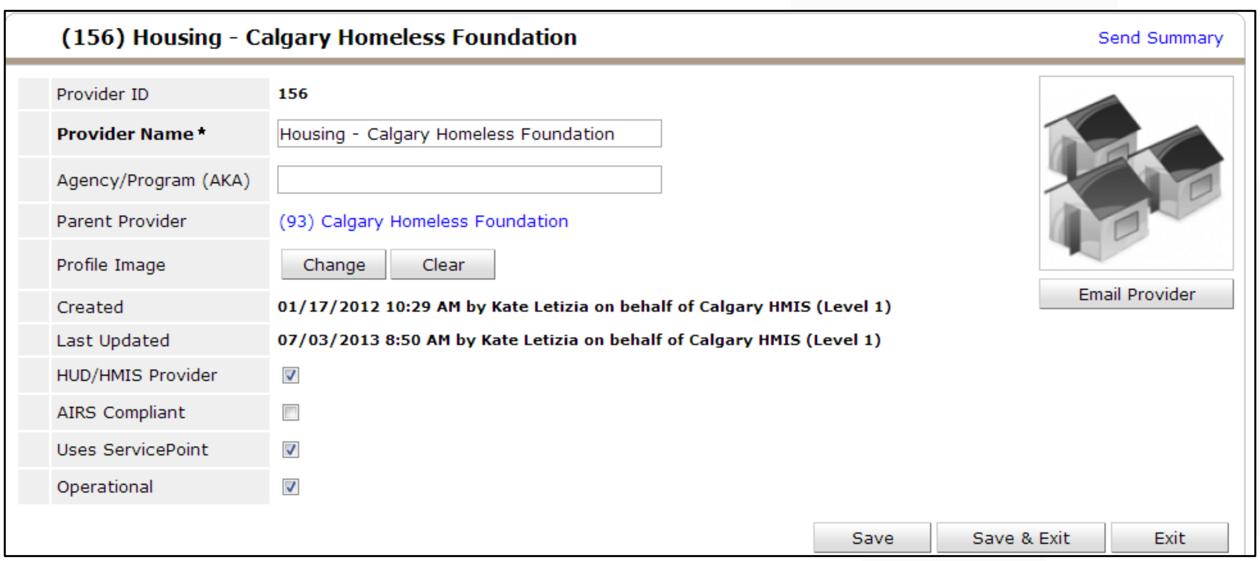


1. Type any of the possible search options listed below into the Search text box:
   - Name of the Provider (full or partial)
   - Provider ID
   - Provider (all the Users for that Provider will appear)

   NOTE: Clicking Search will bring up all the Providers you have access to
2. Click the pencil icon of the relevant Provider to open the Provider record

Editing a Provider Account

Standard Profile Information



- **Provider ID** – Automatically generated by ServicePoint™. This cannot be changed
- **Provider Name** – Agency or Program name as populated by the HMIS Team upon Provider creation.
    - **Please do not change this if you are a Housing First Program!** If the Provider Name does need to be changed, contact the HMIS Team
- **Agency/Program (AKA)** – Indicates a nickname (also known as) for the Provider. This can be used in a Provider search.
- **Parent Provider** –Indicates which Parent Provider this record was built under.
- **Profile Image** – A logo (or other image) can be added or edited. This will be seen by others when they search for Providers through **ResourcePoint.**
    - Click the **Change** button and upload an image.
    - The image will appear as a 150 pixel by 150-pixel image.
- **Created** – Indicates when the Provider was created, the User it was created by, and the Provider it was created on behalf of.
- **Last Updated** – Indicates when the Provider was last updated, which User it was updated by, and which Provider it was updated on behalf of.
- **HUD/HMIS Provider** – This check box can be ignored as it is an American standard.
- **AIRS Compliant** – This check box can be ignored as it is an American standard.
- **Uses ServicePoint™** – This box should be checked for **Programs <u>but not Agencies</u>**. Checking this box indicates that the Provider uses ServicePoint™ (indicated in searches by).
- **Operational** – This box should be checked if the Provider account is active.

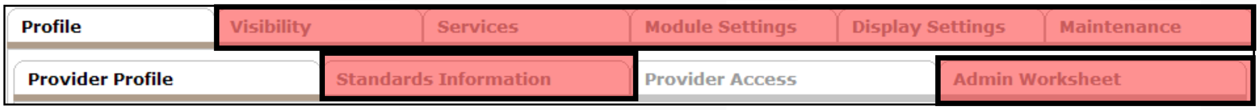
Click **Save** or **Save & Exit** to save your changes

Profile Tab

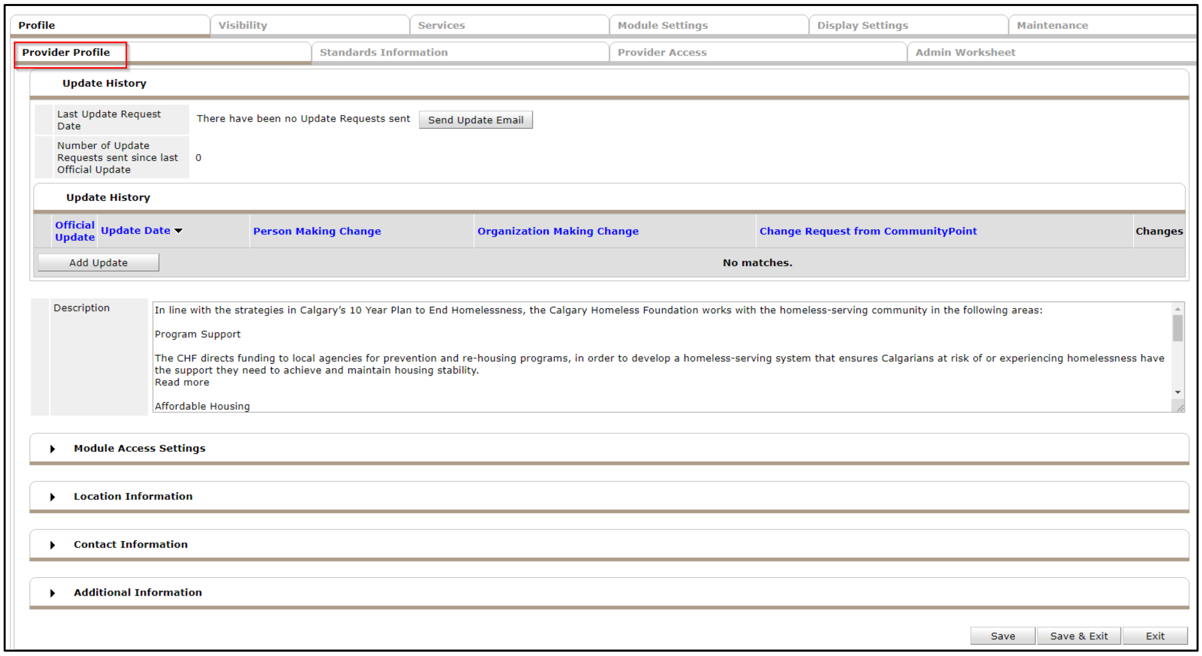
The Profile Tab consists of two tabs that will be of use to you as an Agency Admin:

- the Provider Profile Tab
- the Provider Access Tab.

In your role as Agency Admin, you will not require access to any of the tabs highlighted in red below:

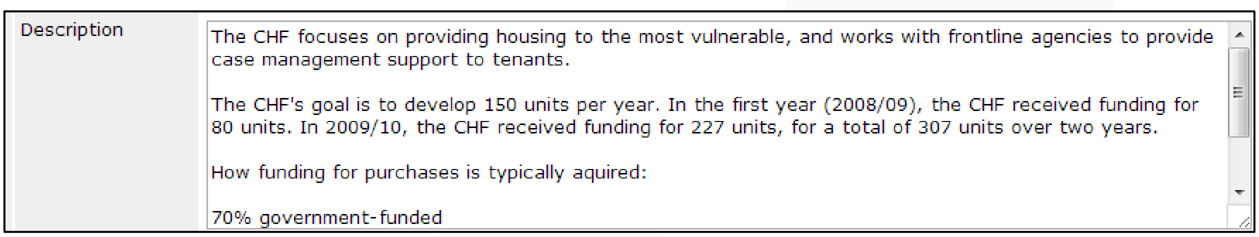


Provider Profile Tab



Description – A detailed description of the Agency or Program is entered here.

For **Programs** it is important to ensure that the description clearly defines what the Program is as this may be referred to by other Users when they are searching for Programs to refer clients to.



Module Access Settings

- The HMIS Team uses this to indicate which ServicePoint™ modules will be attached to the Provider

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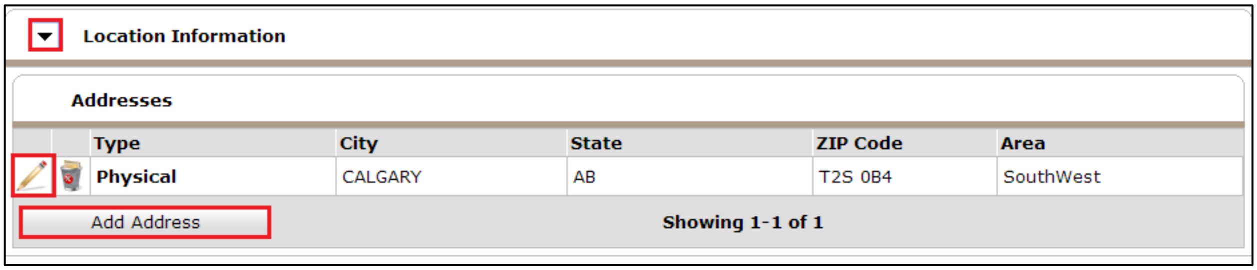
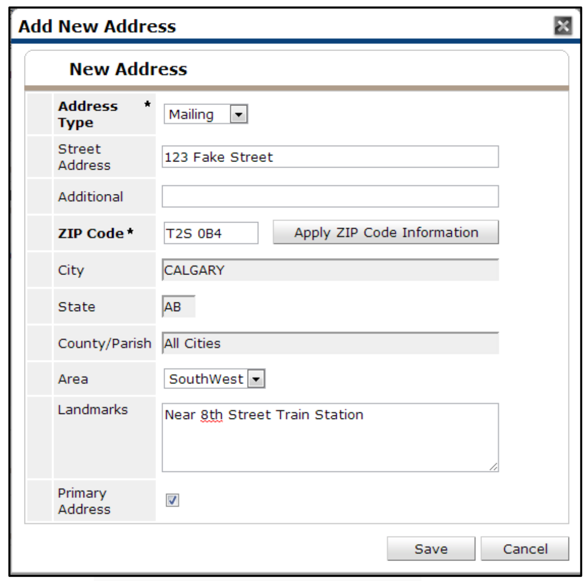
Location Information – In this section you can attach addresses associated with the Provider. Information here will appear when Users search for the Provider using ResourcePoint. Click the down arrow to expand:



To Add an Address:



1. Click Add Address
2. Choose an Address Type (required)
3. Enter a Street Address
4. Enter an Additional address (if needed)
5. Enter a Postal Code in the Zip Code field (required)
6. Click Apply ZIP Code Information to populate City, State (Province), and County/Parish
7. Choose an Area
8. Enter any useful landmarks (if needed)
9. Check Primary Address check box if this address should be the primary address
10. Click Save

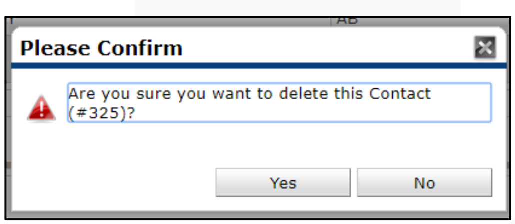
⚠ You can only have ONE Primary Address. The Primary Address will appear when Users search for the Provider using ResourcePoint

To Update an Existing Address:

1. Click the pencil icon beside the relevant address
2. Update fields accordingly (see to Add and Address below)

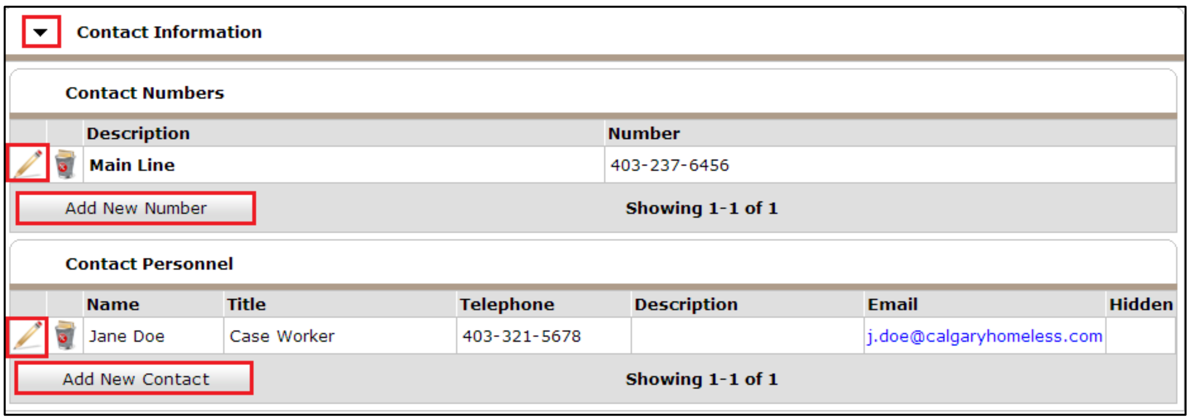
To Delete an Address:

1. Click the Garbage Can icon beside the relevant line
2. You will be prompted to confirm the deletion; click Yes:



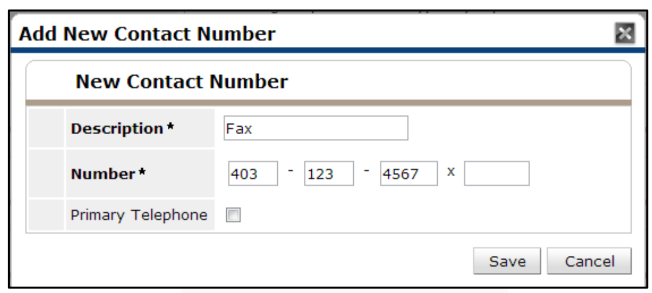
Contact Information

In this section you can assign contact information and contact personnel for the Provider. This information will appear when Users search for the Provider using ResourcePoint. Click the down arrow to expand:



To add a Contact Number:

1. Click Add New Number
2. Choose a Description (required)
3. Enter a Number (required)
4. Check the Primary Telephone box only if the number is to be the primary number
5. Click Save



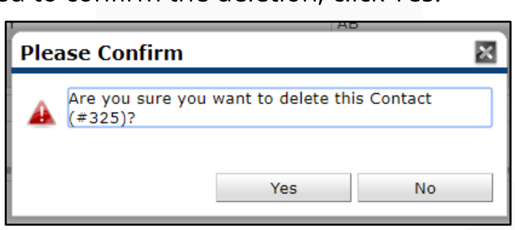
⚠ You can only assign ONE contact number as Primary Telephone; this will appear when Users search for the Provider using ResourcePoint

To update an existing Contact Number:

1. Click the pencil icon beside the relevant number
2. Update fields accordingly (see to Add a Contact Number above)

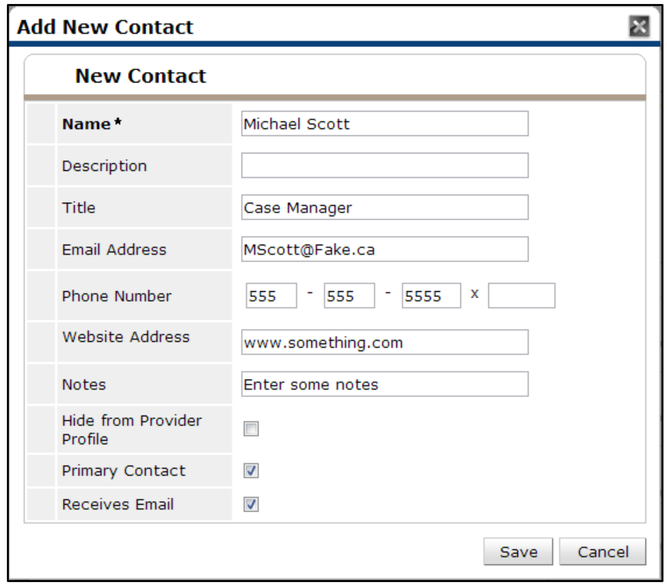
To delete a Contact Number:

1. Click the Garbage Can icon beside the relevant line
2. You will be prompted to confirm the deletion; click Yes:



Contact Personnel:

***To Add Contact Personnel*:**



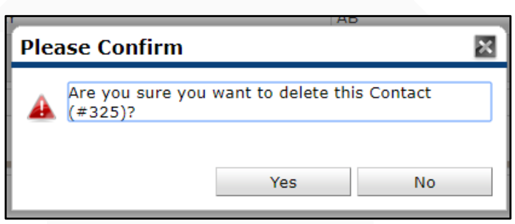
1. Click Add New Contact
2. Enter the full name of the contact person in the Name* field (required)
3. Enter a Description for the contact
4. Enter a Title for the contact
5. Enter an Email Address
6. Enter a Phone Number
7. Enter a Website Address
8. Enter any relevant Notes
9. Check the Hide from Provider Profile check box ONLY if you do NOT want this contact to appear in ResourcePoint search results
10. Check the Primary Contact check box if this contact will be the Provider's primary contact
11. Check the Receives Email check box if the contact receives email
12. Click Save

To Update an Existing Contact Personnel:

1. Click the pencil icon beside the relevant contact
2. Update fields accordingly (see To Add Contact Personnel above)

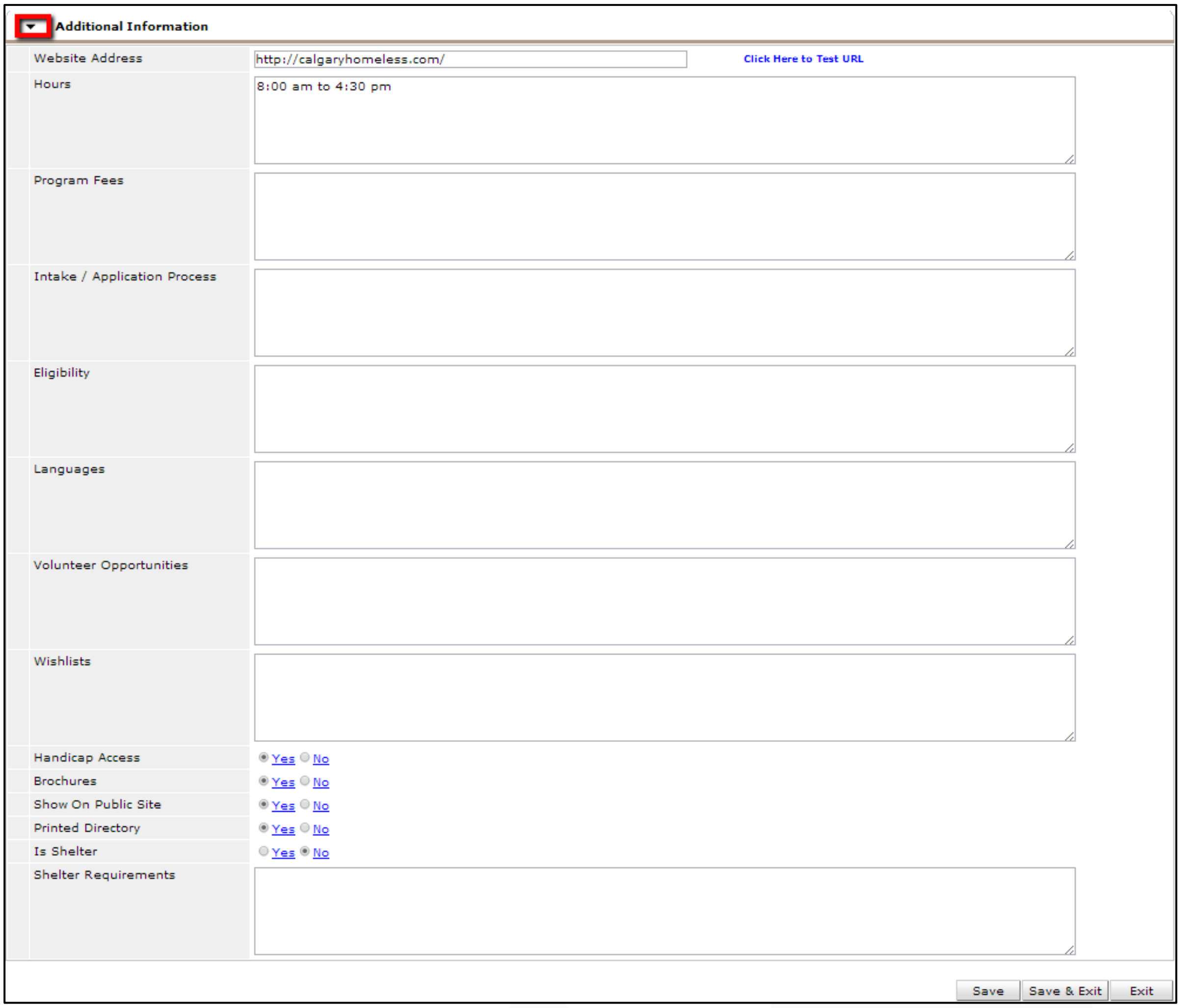
To delete a contact Personnel:

1. Click the Garbage Can icon beside the relevant link
2. You will be prompted to confirm the deletion; click Yes:



Additional Information

This section allows you to enter specific Provider information. Click the down arrow to expand:

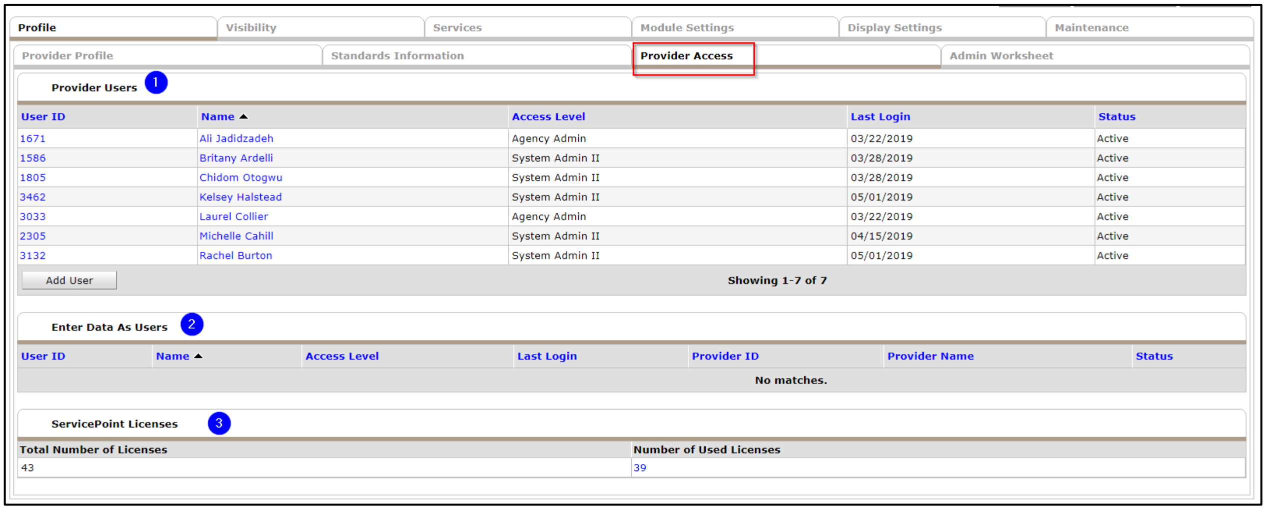


1. Enter the Program's Website Address
2. Enter the Program's operation hours
3. Enter the Program Fees associated with services provided
4. Enter the Intake/Application Process to enter the program (the registration process)
5. Enter the Eligibility to enter the program
6. Enter the Languages that can be accommodated at the program
7. Enter the Volunteer Opportunities that are available at your program
8. Enter the Wishlists that your program may have (goods and services needed by the program)

9. Indicate Handicap Access
10. Indicate if the Program has brochures available
11. Indicate whether or not you want the program to Show On Public Site (whether the program will appear when being searched for in ResourcePoint)
12. Indicate whether or not to be included in the Printed Directory
13. Indicate whether the program is a Shelter
    - If it is a shelter, indicate the Shelter Requirements

⚠ Remember to click the **Save** button to ensure anything you added or changed is saved.

Provider Access Tab



The Provider Access Tab contains a list of Users that are connected to the Provider(s) that you are an Agency Administrator for. Each section within this tab is outlined as follows:

1. **Provider Users**
   - Users that have been built under your Provider
2. **Enter Data As Users**
   - Users that have 'Enter Data As' capabilities for your Provider. You will only be able to see Users that you are an Administrator for (i.e. Users built under one of your Providers)
3. **ServicePoint Licenses**
   - User Licenses allocated to your specific Provider
     - You can see the Number of Licenses and Number of Used Licenses in the **ServicePoint™ Licenses** section
   - Click the number under **Number of Used Licenses** to view the Users with licenses under your Provider
   - **NOTE: Most User Licenses are allocated to the Agency Provider; therefore, it is not uncommon to see zero (0) User Licenses for Program Providers**