

HMIS ServicePoint

Agency Administrators

Calgary HMIS Initiative

Ensure Accuracy, Completion & Integrity of Data in HMIS ServicePoint



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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.

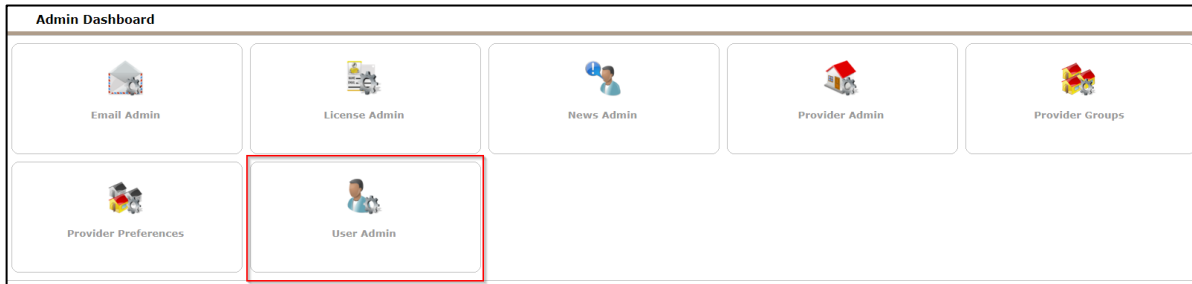
Purpose of this Manual

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.

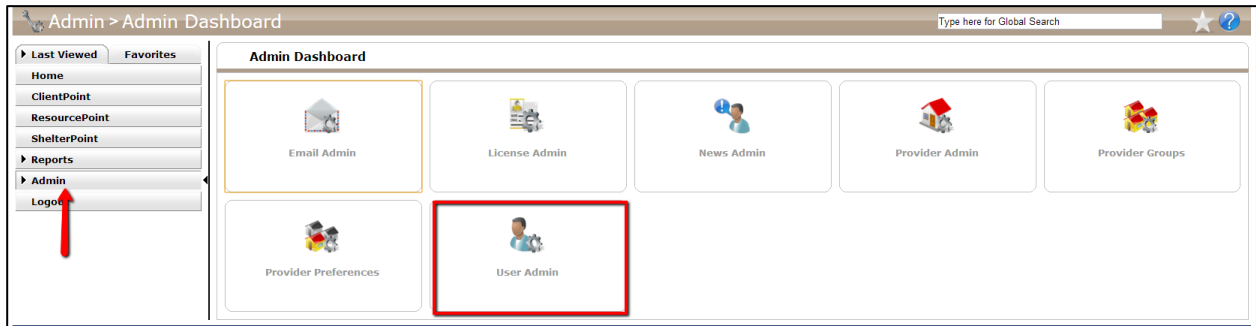
If there is a new employee at your agency who has previously completed the above requirements, email the HMIS team and request a new User profile under your agency by submitting an HMIS User Agreement. Ensure to include their first and last name and which program(s) they must have access to.

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

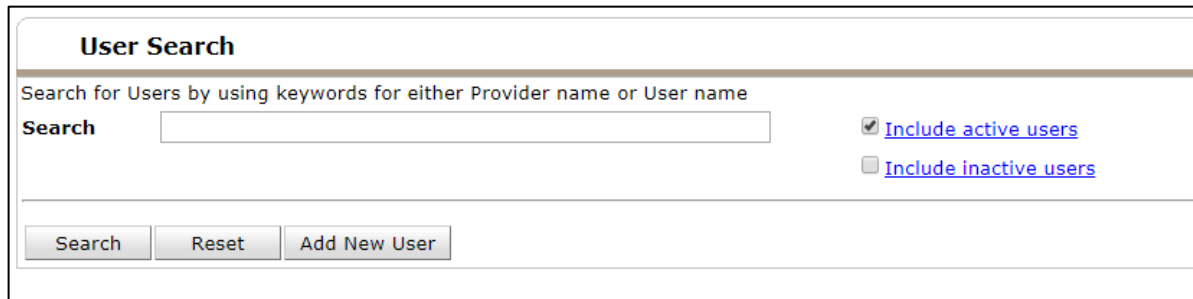
Accessing the User Admin Function

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:

The 'User Search' interface features a title bar, a search instruction: 'Search for Users by using keywords for either Provider name or User name', a search input field, and two checkboxes: 'Include active users' (checked) and 'Include inactive users' (unchecked). At the bottom, there are three buttons: 'Search', 'Reset', and 'Add New User'.

Opening a User Account



User Search

Search for Users by using keywords for either Provider name or User name

Search ¹ [Include active users](#) ² [Include inactive users](#)

³

User Search Results




	User	Name	Provider	Access Level	Active Status	SP License	ART License
 ⁴	JLegate (822)	Jennifer Legate	Calgary HMIS (1)	System Admin II	Active		ART Report Viewing

Showing 1-1 of 1

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

User Information	Enter Data As Groups	Resource Groups
User ID	860	
Provider *	Calgary HMIS (1)	Search My Provider Clear
Has SP License	Yes	
Name *	Gord Austin	<div style="border: 2px solid red; padding: 5px;"> <p>It is your responsibility to fill in the following fields:</p> <ul style="list-style-type: none"> Title E-Mail Telephone </div>
Title		
E-mail		
Telephone		
User Name *	GAustin	
Password *	*****	Generate Password
	Password must be 8-50 characters long with at least two numbers or symbols.	
Password Expiration	Friday, September 6, 2013	
Role *	System Admin I	
User Expiration	<input type="text"/> / <input type="text"/> / <input type="text"/>    Current	
Status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive	
Consecutive Bad Logins	0 <input type="button" value="Reset"/>	
Last Login	Friday, August 9, 2013	
Has Accepted EULA	Yes	
		Save Save & Exit Exit

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:

User Name *	Bardelli
Password *	password123 2 <input type="button" value="Generate Password"/>
Password must be 8-50 characters long with at least two numbers or symbols.	
Password Expiration	Saturday, August 16, 2014
Role *	System Admin II
User Expiration	<input type="text"/> / <input type="text"/> / <input type="text"/> Current
Status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Consecutive Bad Logins	0 <input type="button" value="Reset"/> 1
Last Login	Thursday, July 10, 2014
Has Accepted EULA	Yes
<input type="button" value="Save"/> <input checked="" type="button" value="Save & Exit"/> <input type="button" value="Exit"/>	

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

User Information **Enter Data As Groups** Resource Groups

Enter Data As Groups - Gord Austin (860)

Group ID	Name	Date Added
- 4	Calgary HMIS(1) - Children Included	04/22/2013

Manage Enter Data As Groups

Enter Data As Groups Search

Search for Enter Data As Groups by using keywords from their Group name or description.

Search

Enter Data As Group Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
Group ID	Name																								Date Created	Last Updated	
+	317	Calgary Dream Centre(158)																								03/01/2012	03/01/2012
+	318	Calgary Dream Centre(158) - Children Included																								03/01/2012	03/01/2012
+	319	Community Housing - Calgary Dream Centre(159)																								03/01/2012	03/01/2012
+	320	Community Housing - Calgary Dream Centre(159) - Children Included																								03/01/2012	03/01/2012
+	323	Tower - Calgary Dream Centre(161)																								03/26/2012	03/26/2012
+	324	Tower - Calgary Dream Centre(161) - Children Included																								03/26/2012	03/26/2012

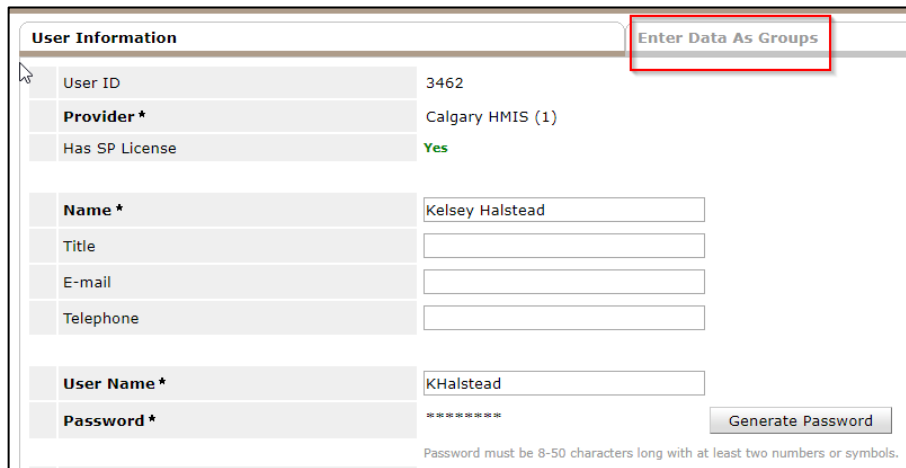
Showing 1-6 of 6

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

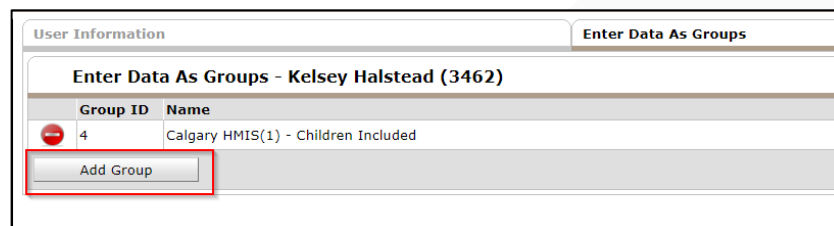


The screenshot shows the 'User Information' tab in a web application. The 'Enter Data As Groups' tab is highlighted with a red box. The user information includes:

- User ID: 3462
- Provider*: Calgary HMIS (1)
- Has SP License: Yes
- Name*: Kelsey Halstead
- Title: (empty)
- E-mail: (empty)
- Telephone: (empty)
- User Name*: KHalstead
- Password*: (masked with asterisks)

A 'Generate Password' button is visible next to the password field. A note at the bottom states: 'Password must be 8-50 characters long with at least two numbers or symbols.'

2. Click Add Group

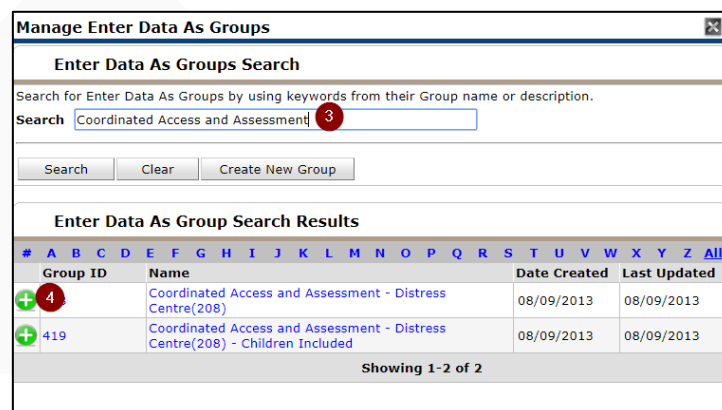


The screenshot shows the 'Enter Data As Groups - Kelsey Halstead (3462)' tab. It displays a table with the following data:

Group ID	Name
4	Calgary HMIS(1) - Children Included

An 'Add Group' button is highlighted with a red box at the bottom of the table.

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 screenshot shows the 'Manage Enter Data As Groups' search window. The search term 'Coordinated Access and Assessment' is entered in the search box. The search results are displayed in a table:

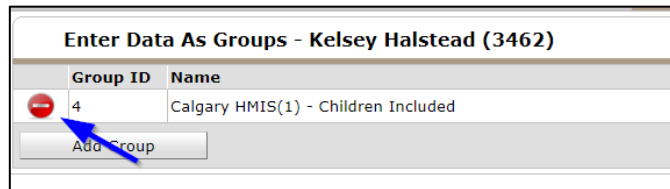
#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
Group ID	Name																								Date Created	Last Updated	
4	Coordinated Access and Assessment - Distress Centre(208)																								08/09/2013	08/09/2013	
419	Coordinated Access and Assessment - Distress Centre(208) - Children Included																								08/09/2013	08/09/2013	


The table shows two results. The first result (Group ID 4) is highlighted with a green plus icon and a red circle with the number 4. The second result (Group ID 419) is also highlighted with a green plus icon. The text 'Showing 1-2 of 2' is displayed at the bottom of the table.

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

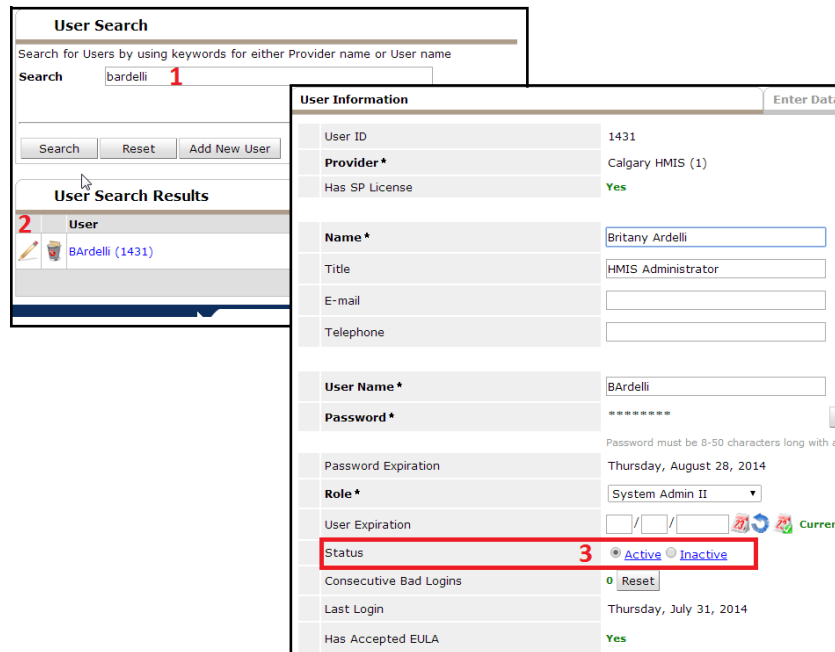
When a User is created they are automatically assigned 'Active' status and the User will have full access to ServicePoint™ based on the role that they are assigned.

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



The screenshot displays two overlapping windows from a web application. The 'User Search' window on the left shows a search bar with 'bardelli' entered and a red '1' next to it. Below the search bar are buttons for 'Search', 'Reset', and 'Add New User'. The 'User Search Results' window shows a list of users with a red '2' next to the first entry, 'Bardelli (1431)'. The 'User Information' window on the right shows the profile for user ID 1431, including fields for Name, Title, E-mail, Telephone, User Name, Password, Password Expiration, Role, User Expiration, Status, Consecutive Bad Logins, Last Login, and Has Accepted EULA. The 'Status' field is highlighted with a red box and a red '3', showing radio buttons for 'Active' (selected) and 'Inactive'.

User Search		
Search for Users by using keywords for either Provider name or User name		
Search	bardelli 1	
Search	Reset	Add New User
User Search Results		
2	User	
	 Bardelli (1431)	

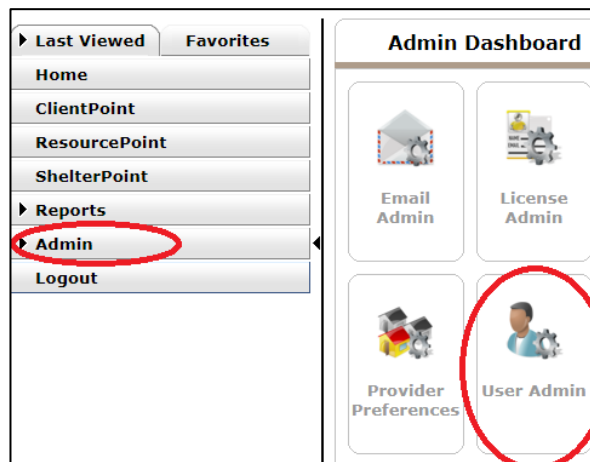
User Information	
User ID	1431
Provider *	Calgary HMIS (1)
Has SP License	Yes
Name *	Britany Ardelli
Title	HMIS Administrator
E-mail	
Telephone	
User Name *	Bardelli
Password *	*****
Password Expiration	Thursday, August 28, 2014
Role *	System Admin II
User Expiration	<input type="text"/> / <input type="text"/> / <input type="text"/>
Status	3 <input checked="" type="radio"/> Active <input type="radio"/> Inactive
Consecutive Bad Logins	0 <input type="button" value="Reset"/>
Last Login	Thursday, July 31, 2014
Has Accepted EULA	Yes

Deleting a User's profile

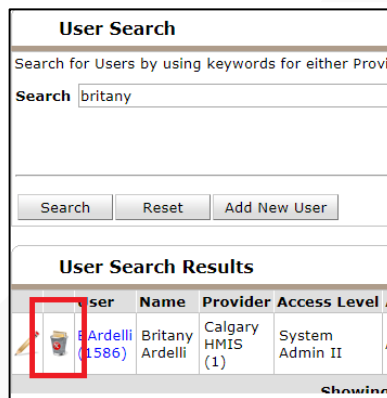
In accordance with the **Privacy Policy** and **User Policy, Responsibility Statement, and Code of Ethics User Agreement (HMIS)** please ensure that the User profiles of Agency staff member(s) who **no longer require usage** of their accounts are **deleted**.

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 will not erase their historical data.

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

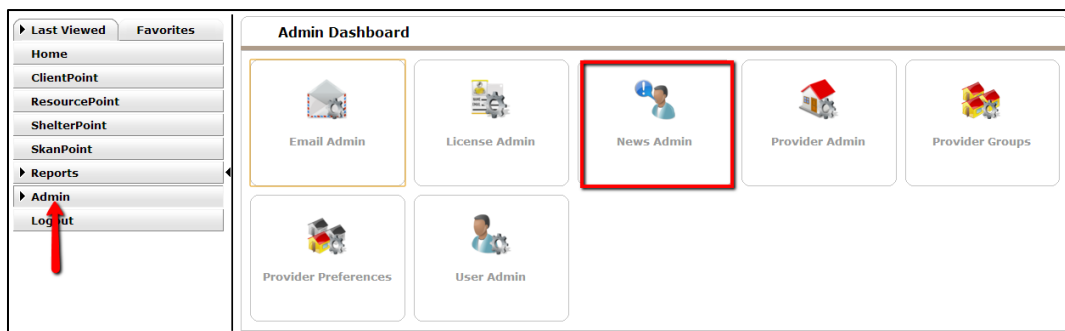
News Admin

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

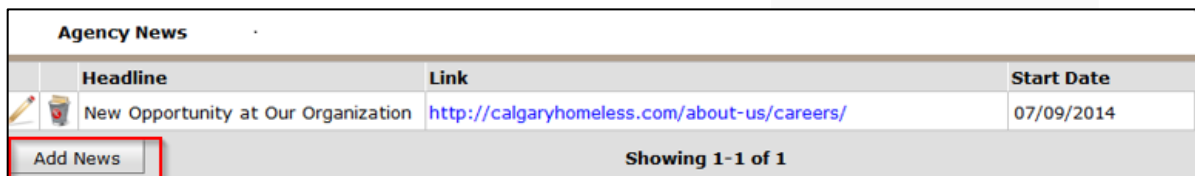
1. Click the Admin module (left hand side of the screen)
2. Click News Admin



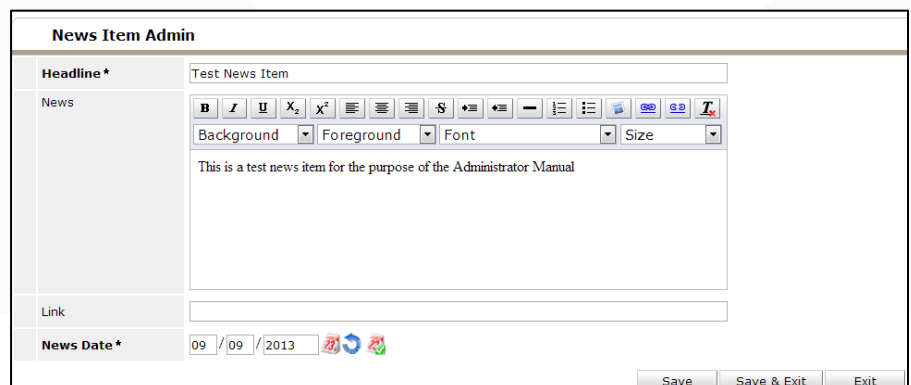
You will be directed to the News Administration interface where current Agency News are displayed. From this interface you can add, view, edit and/or delete news items.

Adding News Items

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

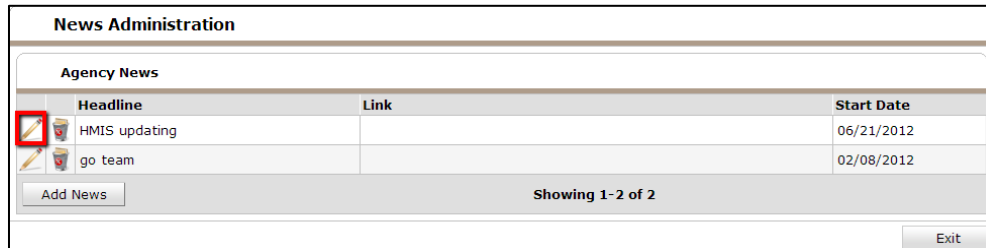


2. Enter the Headline (Subject)
3. Enter news information into the News text field
4. Apply formatting options using the toolbar
5. Enter a Link (if necessary)
6. Add a News Date
7. Click Save & Exit



Editing Existing News Items

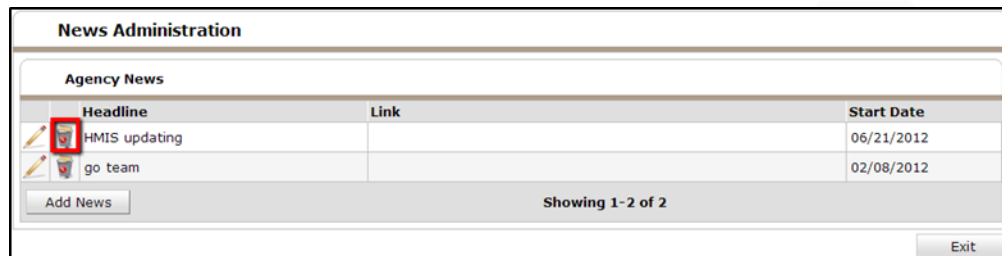
1. In the News Administration interface, click the pencil icon for the relevant news item you would like to update



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



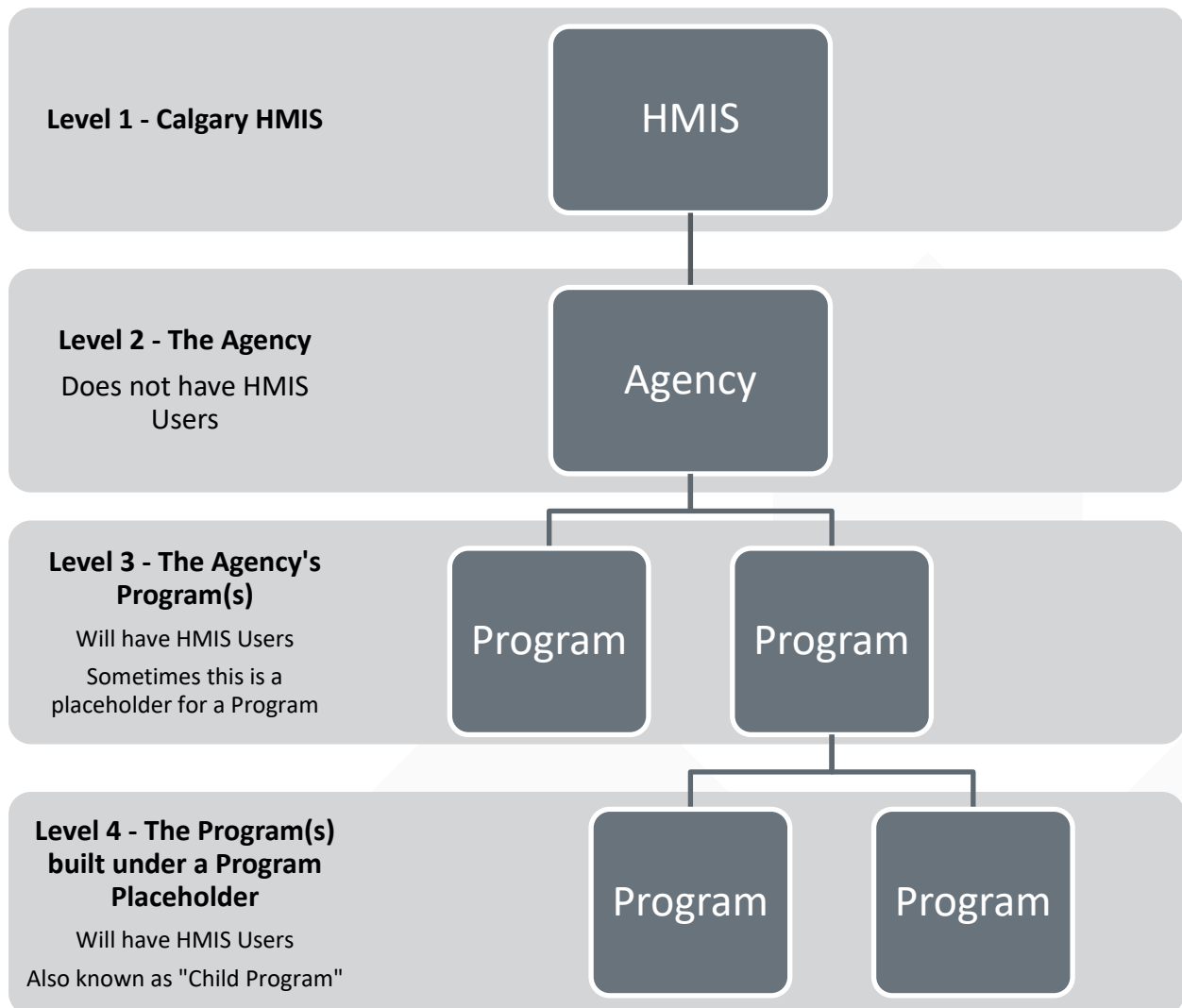
Provider Admin

Introduction

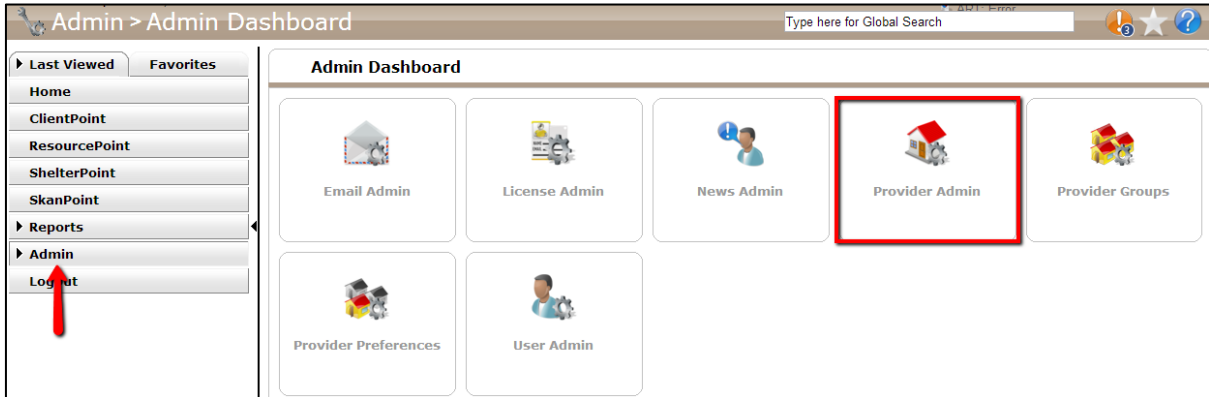
The Provider Admin function is where Agency Administrators can update the details of their Program. It is important to keep this profile up-to-date to reflect current Program information. Up-to-date profiles will help other Programs as they search for alternative programs for their client(s).

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:

Provider Search

Search for Providers by using keywords from the Provider Name or Description.

Search

Provider Number

Enter or scan a Provider ID number to look up that Provider.

Provider ID #

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

Opening a Provider Account

Provider Search

Search for Providers by using keywords from the Provider Name or Description.

Search

Provider Number

Enter or scan a Provider ID number to look up that Provider.

Provider ID #

Provider Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
2				93	Calgary Homeless Foundation	Level 2	01/09/2014																				

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

(156) Housing - Calgary Homeless Foundation [Send Summary](#)

Provider ID	156	 <input type="button" value="Email Provider"/>
Provider Name *	<input type="text" value="Housing - Calgary Homeless Foundation"/>	
Agency/Program (AKA)	<input type="text"/>	
Parent Provider	(93) Calgary Homeless Foundation	
Profile Image	<input type="button" value="Change"/> <input type="button" value="Clear"/>	
Created	01/17/2012 10:29 AM by Kate Letizia on behalf of Calgary HMIS (Level 1)	
Last Updated	07/03/2013 8:50 AM by Kate Letizia on behalf of Calgary HMIS (Level 1)	
HUD/HMIS Provider	<input checked="" type="checkbox"/>	
AIRS Compliant	<input type="checkbox"/>	
Uses ServicePoint	<input checked="" type="checkbox"/>	
Operational	<input checked="" type="checkbox"/>	

- **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 but not Agencies**. 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:

Profile	Visibility	Services	Module Settings	Display Settings	Maintenance
Provider Profile	Standards Information	Provider Access	Admin Worksheet		

Provider Profile Tab

Profile	Visibility	Services	Module Settings	Display Settings	Maintenance
Provider Profile	Standards Information	Provider Access	Admin Worksheet		
Update History					
Last Update Request Date	There have been no Update Requests sent		Send Update Email		
Number of Update Requests sent since last Official Update	0				
Update History					
Official Update	Update Date	Person Making Change	Organization Making Change	Change Request from CommunityPoint	Changes
Add Update					
No matches.					
Description	<p>In line with the strategies in Calgary's 10 Year Plan to End Homelessness, the Calgary Homeless Foundation works with the homeless-serving community in the following areas:</p> <p>Program Support</p> <p>The CHF directs funding to local agencies for prevention and re-housing programs, in order to develop a homeless-serving system that ensures Calgarians at risk of or experiencing homelessness have the support they need to achieve and maintain housing stability.</p> <p>Read more</p> <p>Affordable Housing</p>				
Module Access Settings					
Location Information					
Contact Information					
Additional Information					
Save Save & Exit Exit					

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

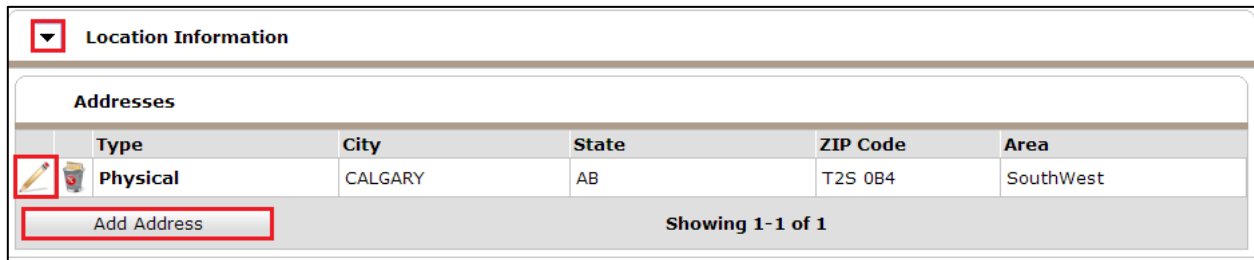
- ⚠ For **Programs** it is important to ensure that the description clearly defines what the Program is as this may be referred to by other Users when they are searching for Programs to refer clients to.

Description	<p>The CHF focuses on providing housing to the most vulnerable, and works with frontline agencies to provide case management support to tenants.</p> <p>The CHF's goal is to develop 150 units per year. In the first year (2008/09), the CHF received funding for 80 units. In 2009/10, the CHF received funding for 227 units, for a total of 307 units over two years.</p> <p>How funding for purchases is typically aquired:</p> <p>70% government-funded</p>
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Module Access Settings

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

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:

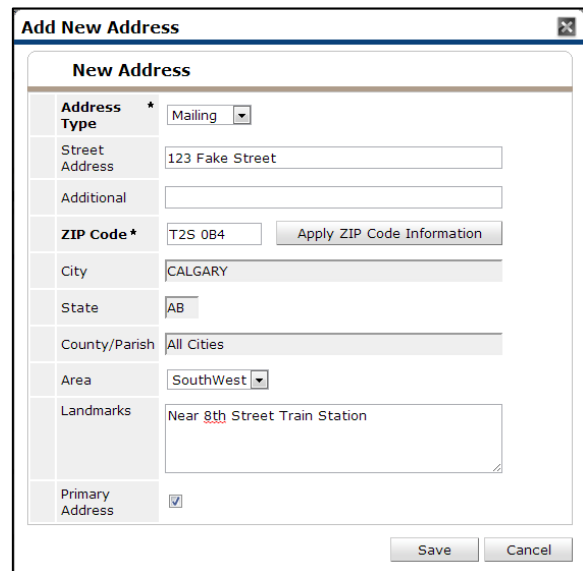



Type	City	State	ZIP Code	Area
Physical	CALGARY	AB	T2S 0B4	SouthWest

Add Address Showing 1-1 of 1

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



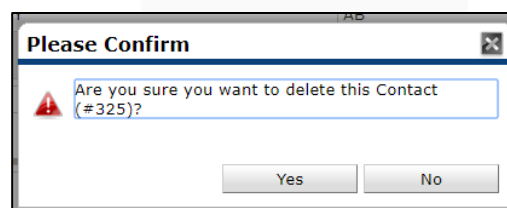
 You can only have ONE Primary Address. The Primary Address will appear when Users search for the Provider using ResourcePoint

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:

▼ **Contact Information**

Contact Numbers

	Description	Number
	Main Line	403-237-6456
Add New Number		Showing 1-1 of 1

Contact Personnel

	Name	Title	Telephone	Description	Email	Hidden
	Jane Doe	Case Worker	403-321-5678		j.doe@calgaryhomeless.com	<input type="checkbox"/>
Add New Contact						Showing 1-1 of 1

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

Add New Contact Number ✕

New Contact Number

Description *

Number * - - x

Primary Telephone

Save Cancel

- 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:

Please Confirm ✕

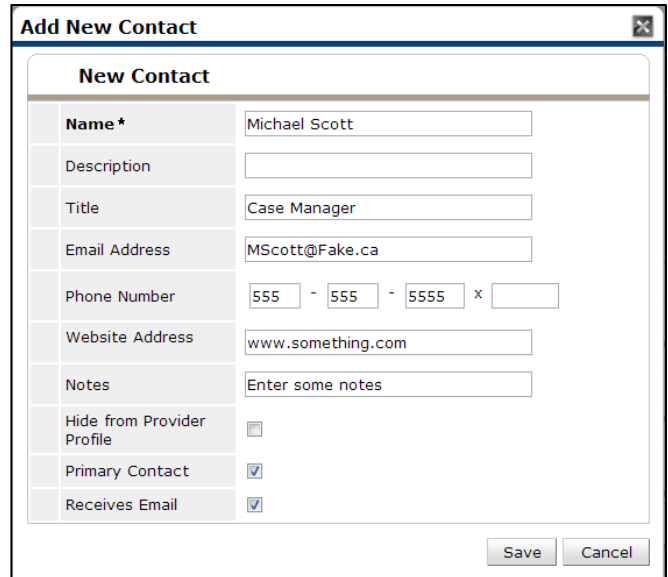
Are you sure you want to delete this Contact (#325)?

Yes No

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



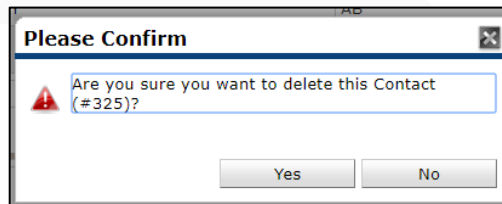
New Contact	
Name *	Michael Scott
Description	
Title	Case Manager
Email Address	MScott@Fake.ca
Phone Number	555 - 555 - 5555 x
Website Address	www.something.com
Notes	Enter some notes
Hide from Provider Profile	<input type="checkbox"/>
Primary Contact	<input checked="" type="checkbox"/>
Receives Email	<input checked="" type="checkbox"/>


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:




Please Confirm	
	Are you sure you want to delete this Contact (#325)?
Yes	No

Additional Information

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

Additional Information	
Website Address	<input type="text" value="http://calgaryhomeless.com/"/> Click Here to Test URL
Hours	<input type="text" value="8:00 am to 4:30 pm"/>
Program Fees	<input type="text"/>
Intake / Application Process	<input type="text"/>
Eligibility	<input type="text"/>
Languages	<input type="text"/>
Volunteer Opportunities	<input type="text"/>
Wishlists	<input type="text"/>
Handicap Access	<input checked="" type="radio"/> Yes <input type="radio"/> No
Brochures	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show On Public Site	<input checked="" type="radio"/> Yes <input type="radio"/> No
Printed Directory	<input checked="" type="radio"/> Yes <input type="radio"/> No
Is Shelter	<input type="radio"/> Yes <input checked="" type="radio"/> No
Shelter Requirements	<input type="text"/>

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

Profile	Visibility	Services	Module Settings	Display Settings	Maintenance	
Provider Profile	Standards Information	Provider Access	Admin Worksheet			
Provider Users 1						
User ID	Name ^	Access Level	Last Login	Status		
1671	Alli Jaddizadeh	Agency Admin	03/22/2019	Active		
1586	Britany Ardelli	System Admin II	03/28/2019	Active		
1805	Chidom Odogwu	System Admin II	03/28/2019	Active		
3462	Kelsey Halstead	System Admin II	05/01/2019	Active		
3033	Laurel Collier	Agency Admin	03/22/2019	Active		
2305	Michelle Cahill	System Admin II	04/15/2019	Active		
3132	Rachel Burton	System Admin II	05/01/2019	Active		
Add User Showing 1-7 of 7						
Enter Data As Users 2						
User ID	Name ^	Access Level	Last Login	Provider ID	Provider Name	Status
No matches.						
ServicePoint Licenses 3						
Total Number of Licenses			Number of Used Licenses			
43			39			

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**