

Agency Admin

Purpose: This document reviews the Community Services user role of “Agency Admin”. This guide provides important information on the expectations for Agency Admin users and what functions they can use in the software.

Note: The Agency Admin role is **not** descriptive of a person’s title in their organization. Rather, this user role denotes a familiarity and expertise with Community Services. In addition, an Agency Admin user frequently only performs these functions for a program and not their entire agency.

Who is an Agency Admin (AA)?

The Agency Admin (AA) is a person who takes a leading role in a program or agency’s data stewardship. At a baseline, an AA will be able to meet the following responsibilities. Each item is detailed in the “Qualities of an Effective Agency Admin (AA)” section.

- **Coordinate with the HMIS Help Desk** on administrative tasks
- **Stays informed with HMIS Updates** and shares them with their programs
- **Understand Data Quality** expectations
- Understand program data entry requirements
- Be a **Source of Knowledge and Support** for staff in effectively utilizing HMIS

Qualities of an Effective Agency Admin (AA)

- **Coordinates with the HMIS Help Desk:**
An AA may coordinate with the HMIS help desk on the following items. Refer to your agency on which roles are most appropriate for you.
 - Requesting new users: Only an AA or Primary Point of Contact may request new user accounts. An AA should be familiar with this process and any required training.
 - Facilitating training: An AA should be able to assist users, or direct them to the most appropriate resource, for additional training and troubleshooting.
 - Deactivating user accounts: An AA must notify the HMIS Help Desk when a user no longer needs an account and should be deactivated.
- **Stays Informed with HMIS Updates:**
An effective AA will be engaged with the HMIS system and seek to learn about changes and/or updates. This is accomplished by:
 - Attending or Watching the AATW: The Agency Administrator Training Webinar (AATW) is a training where the HMIS Team shares important information and updates about the system. For AAs viewing the video, a questionnaire will be included.
 - Sharing Updates: AA are expected to take HMIS updates and share them with the appropriate people in their programs.
- **Understands Data Quality:**
Data quality has wide-reaching effects on the system. High data quality improves project, agency, and system integrity. An affective AA will be a proponent of excellent data quality. This is accomplished by:

- Understanding the Data Quality Plan: An AA should understand and support the data quality standards of timeliness, completeness, accuracy, and consistency.
- Running Data Quality Reports: An AA should be able to review their program's data quality and understand how to make the appropriate corrections. At minimum, an AA should learn to run the following two reports:
 - 0252 Data Completeness Report – This report ensures data is being entered into the system.
 - Canned Data Quality Report – This report reviews data accuracy and also provides a wealth of additional information.
- Supporting Correction of Data Quality: An AA should address data quality issues in their program. This can be done in the following ways:
 - Answering the technical support questions a user might have.
 - Correcting client-level data from their programs.
 - Escalating issues that can't be resolved to the Solari HMIS Help Desk.
- **Source of Knowledge and Support:**

As the AA user role is a mark of Community Services expertise, and not title, an AA should provide support to peers and staff. This can be done by:

 - Understanding Report: An effective AA should be familiar with reports that assess their programs. In addition, an AA should be familiar with how to run the appropriate reports.
 - Submits Effective HMIS Tickets: An AA should be able to submit effective tickets and follow these best practices, encouraging other user to do the same.
 - Provide as many details as possible so the HMIS team can recreate the issue.
 - Do **not** include Personal Identifying Information (PII) in the ticket or in the screenshots or files attached to the ticket.
 - When having issues with reports, please include the name of the report and the parameters used to run the report.
 - Enter one ticket per issue. If you are having an additional issue not related to an existing open ticket, please enter a new ticket as opposed to including the new issue in the existing ticket.
 - Champion a Culture of Privacy and Confidentiality: A strong AA will ensure their program(s) are following HMIS privacy and confidentiality expectations. This is done by:
 - Ensuring staff have the most recent Privacy Notice and ROI available
 - Ensuring staff are following the expectations laid out in the Code of Ethics

Community Services Functionality

In addition to the expectations listed above, Agency Admins have additional abilities in Community Services. The following lists functionalities available to agency admins. *Note*: Agency Admins should not make changes to user profiles or providers that are not **expressly** listed below. Changes made outside of the items below may negatively impact security, privacy, and federal reporting.

- Reset passwords for staff within their agency
- View agency tree and projects
- View current user lists
- Create reporting groups
- Put news on the front page
- Shadow other users