Site Administrator Training

Effective September 2019
Updated December 2021

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Lori Wood, HMIS/CE Trainer

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WHY SITE ADMINISTRATORS?

- IHCDA has streamlined the process of setting up and vetting new users

- Establish a single point of contact at every HMIS and DV production system agency for data quality issues and staff new user and reactivation requests

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SITE ADMINISTRATOR

- All HMIS and DV Agencies need to identify 1 current ClientTrack user to serve as the Site Administrator
    - Highly recommended to have a Deputy Site Administrator as well, for when the primary Site Administrator is not in office, on vacation, leave, etc.

- Please submit a ticket to the helpdesk to update your Site Administrator and Deputy Site Administrator information anytime there are changes to your SA or DSA designation
    - HMIS Help Desk- HMIShelpdesk@ihcda.in.gov
    - DV Help Desk- DVhelpdesk@ihcda.in.gov

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NEW USER SETUPS

- Site Admins will vet staff for appropriate access, and run applicable background checks prior to requesting ClientTrack access per IHCDA HMIS Standard Operating Procedures

- Site Administrators will provide the required training information and links to staff for new user set up

- **The required training information and links are included in each quarterly Site Administrator email sent by Grant Peters, HMIS Manager**
  - *Please save the quarterly email so you can provide your new staff the training information and links*

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NEW USER SET UP CONTINUED

- New user will notify their SA or Deputy SA once ALL required trainings are completed

- SA or DSA will provide the new user with a blank User Agreement and assist with the completion and signing of the User Agreement
    - A blank copy of the HMIS User Agreement and DV ClientTrack User Agreement is available on the Balance of State website at: https://www.in.gov/ihcda/4155.htm
    - Please review the completed UA form for User Name (page 1), initials of user in all required boxes (pages 1 & 2), both required signatures and date (page 3) and legibly printed information (page 4)
    - SA or DSA will obtain the second signature required on page 3 of the User Agreement from the Executive Director or new user's direct supervisor

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NEW USER SET UP CONTINUED

- SA or DSA will email the appropriate helpdesk requesting new user access for the staff member
    - CC the new user in the ticket submission
    - Attach the signed/completed User Agreement to the ticket
    - Include new user's name and note the user has completed all required training

- HMIS staff will confirm training completion via Attendance Reports from GotoWebinar

- If the user has successfully completed all required trainings:
    - IHCDA staff will then provide the username to the Site Administrator and new user via the initial help desk ticket and close the ticket
    - IHCDA staff will then provide the new user's temporary password via a separate email in a new 2-tiered system of privacy.

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USER REACTIVATION

- Staff requiring account reactivation:

    - User will submit a helpdesk ticket and request reactivation
        - Requests received for reactivation will be processed as such by the HMIS team. If a password reset is also needed, please request a password reset in the ticket.

    - IHCDA staff will reactivate the user and send the temp password to the user via personal email

    - IHCDA staff will then cc the administrator on the help desk ticket that the user is active

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USER DEACTIVATIONS

- Fun Facts!

  - Users who do not log in for more than 30 days are inactivated

  - Users who do not log in for more than 90 days are required to go through security training prior to reactivation

  - Setting up a calendar reminder on your computer for every 28 days is a great "self-reminder" to log in and avoid system deactivation.

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USER DEACTIVATION – STAFF DEPARTURES

- Site Administrators will notify the respective help desk within 24 hours of a staff departure so the user account can be deactivated

- Site Administrators aware of staff departures ahead of time may contact the help desk with the date the user account needs to be deactivated, and a help desk agent will deactivate the account at the requested time and notify the Site Administrator upon completion

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DATA QUALITY

- Site Administrators will be the point of contact for data quality errors and dissemination of new procedures to agency staff

  - This will alleviate issues when time to run APR's, CAPER's, and other data quality reports for federal funding and reporting

  - HMIS Data Analyst, Daniella Jordan, will work with Site Administrator on staff data quality issues

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NEXT STEPS

- Questions?

Reach out to the HMISHelpDesk@ihcda.in.gov
Or
DVHelpDesk@ihcda.in.gov

Grant Peters, HMIS Manager- gpeters@ihcda.in.gov

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