Help Desk User Manual

Following the steps in this guide will allow the HMIS team to answer tickets more efficiently without unnecessary follow-up.

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Help Desk Overview

The HMIS team utilizes Mojo Help Desk in order to more effectively address, track, and respond to user requests in the HMIS and DV ClientTrack environments. This software platform allows HMIS team members to manage tickets based on their expertise and overall availability. All requests or questions related to the HMIS or DV ClientTrack environments should be directed to their respective Help Desks and not individual HMIS team members.

The HMIS and DV Help Desks have a 24hr response time. System users can expect an initial response from an HMIS team member within that time frame. The HMIS team will communicate directly with the user if a longer lead time is necessary due to team availability.

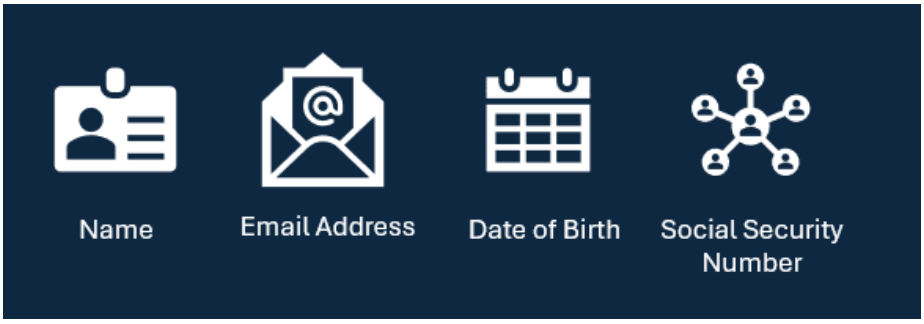
Meet the HMIS Team

- Brendan Devitt, *HMIS Manager*
  - Policy related tickets
  - New organization and new project setup
- Daniella Jordan Gonzales, *HMIS Data Analyst*
  - HIC and PIT
- David Boltz, *HMIS Data Analyst*
  - New user setups and account deactivations
  - Password resets and account reactivations
  - Merge requests
  - New organization and new project setup
- Abigail Kornberger, *HMIS Data Analyst*
  - Password resets and account reactivations
  - HIC and PIT
  - New organization and new project setup
- Jason Shaw, *At Work Solutions (HMIS Technical Consultant)*
  - Merge requests
  - Report questions
  - CE and CHAT assessments

Help Desk Ticket Best Practices

Do not include PII – Personally Identifiable Information (PII).

- Common Examples: Name, Date of Birth, Social Security Number (SSN).



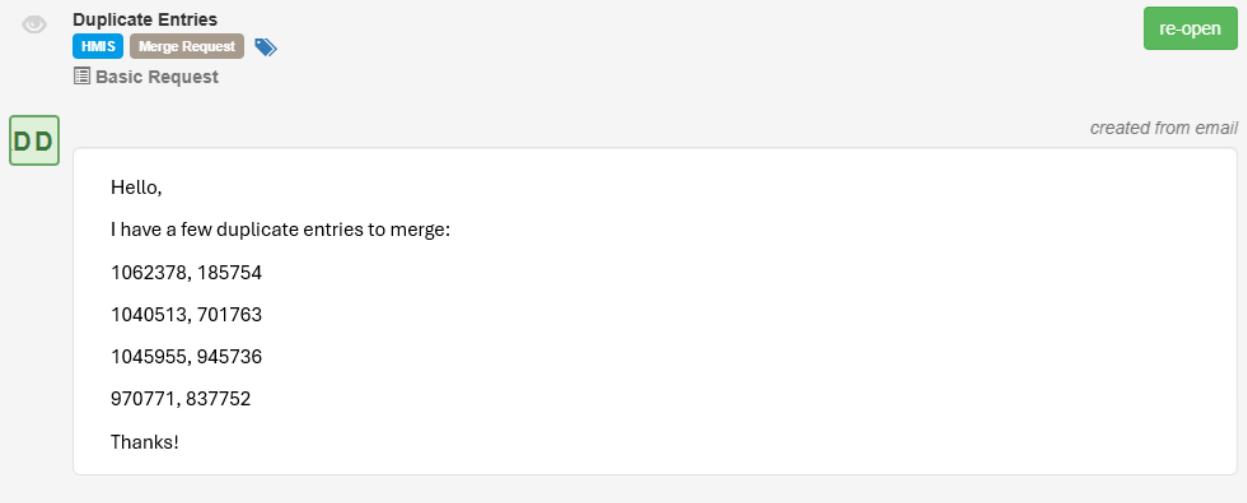
- Please include the client ID number in its place.

Make sure that the request is going to the correct help desk.

- Users in the HMIS environment should submit helpdesk tickets to: HMISHelpDesk@ihcda.IN.gov
- Users in the DV environment should submit helpdesk tickets to: DVHelpDesk@ihcda.IN.gov

Please do not combine multiple types of requests in one ticket (ex: password reset, new user request, case note edit, client merge request).

- HMIS team members are assigned help desk tickets based on their expertise and availability.
- Multiple client merge and new user setups requests are acceptable if each request type is its own ticket.



Common Ticket Types

Password Resets/ Account Reactivation

Reminder: The need to submit help desk tickets for these issues can be avoided!

- Passwords can be reset by the user once a security question has been set up, and the account is active.
- Please log in every 29 days to keep HMIS/ DV accounts active.

Accounts that have been inactive for long periods of time will be required to complete training(s) to be reactivated. Please complete these trainings prior to ticket submission.

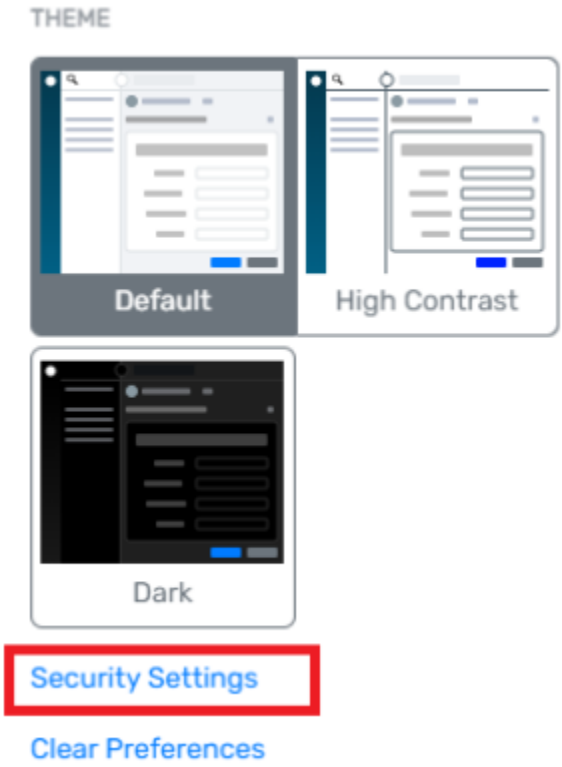
- Accounts inactive for more than 90 days will require security training.
- Inactivation's of more than a year require the completion of new user (HMIS or DV ClientTrack) and security training.

Security Question Setup

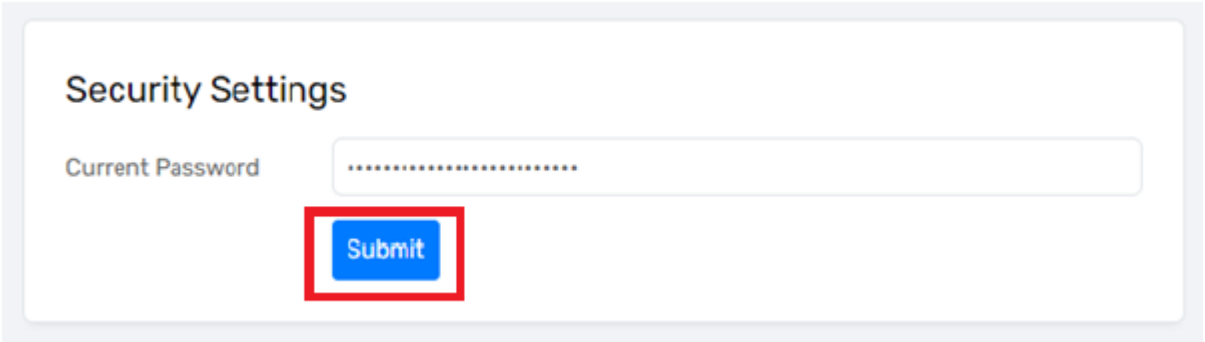
Setting up a security question can help prevent delays in regaining access to your account. After you login to your account, you can set up a security question by updating the security setting under your profile.

1. First, select your initials in the upper right-hand corner.

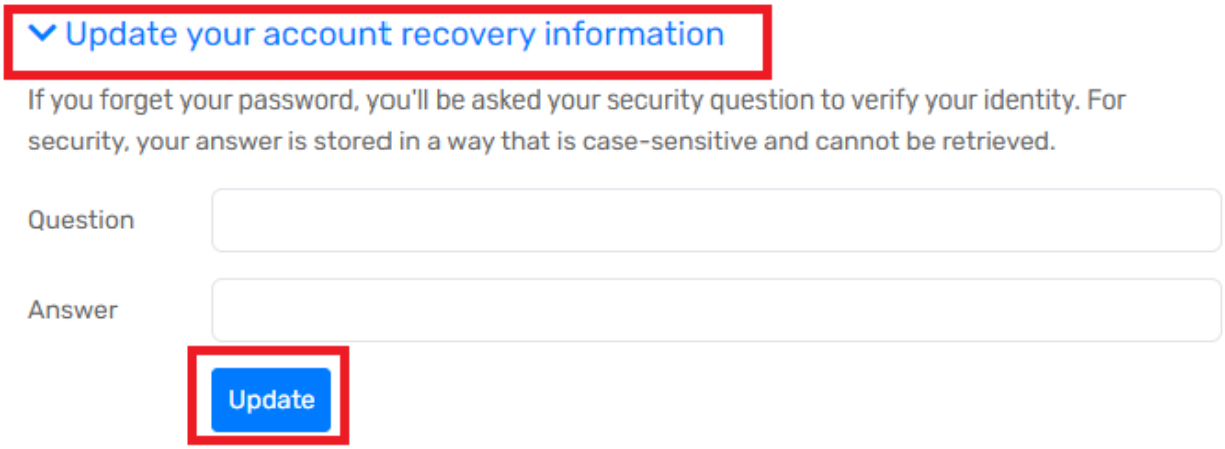
2. Scroll down to the bottom of the window and select “Security Settings”



3. Enter your password to advance the screen.



4. Then select “Update your account recovery information”



5. Enter a question and answer and then select "Update" to save the changes.

New User Setups

Complete the following trainings before submitting a request for new user setup:

HMIS New User Trainings

- 2024 HMIS New User Training - https://attendee.gotowebinar.com/recording/423501526824185091
- 2024 HMIS/ClientTrack Security Training - https://register.gotowebinar.com/recording/4421143286182176259

DV New User Trainings

- 2024 DV ClientTrack New User Training - https://attendee.gotowebinar.com/recording/889142502167154096
- 2024 HMIS/DV ClientTrack Security Training- https://register.gotowebinar.com/recording/4421143286182176259

- Complete user agreement with a manager's signature on page three
  - HMIS User Agreement www.in.gov/ihcda/files/HMIS-User-Agreement-2024v2.pdf
  - DV User Agreement https://www.in.gov/ihcda/files/DV-Client-Track-User-Agreement-2024v2_.pdf

Help desk ticket should be submitted by the site administrator for the agency.

- Include the signed agreement.
- Let us know if CE access is also needed during HMIS new user setups.

CE New User Trainings

- 2024 Coordinated Entry New User Training: https://attendee.gotowebinar.com/recording/3733952924143740673
- Housing Problem Solving: https://attendee.gotowebinar.com/recording/135483362146034435

- CE Assessment Training (CHAT) Collaborative Housing Assessment Tool: https://attendee.gotowebinar.com/recording/5514940758350457180

Report Questions

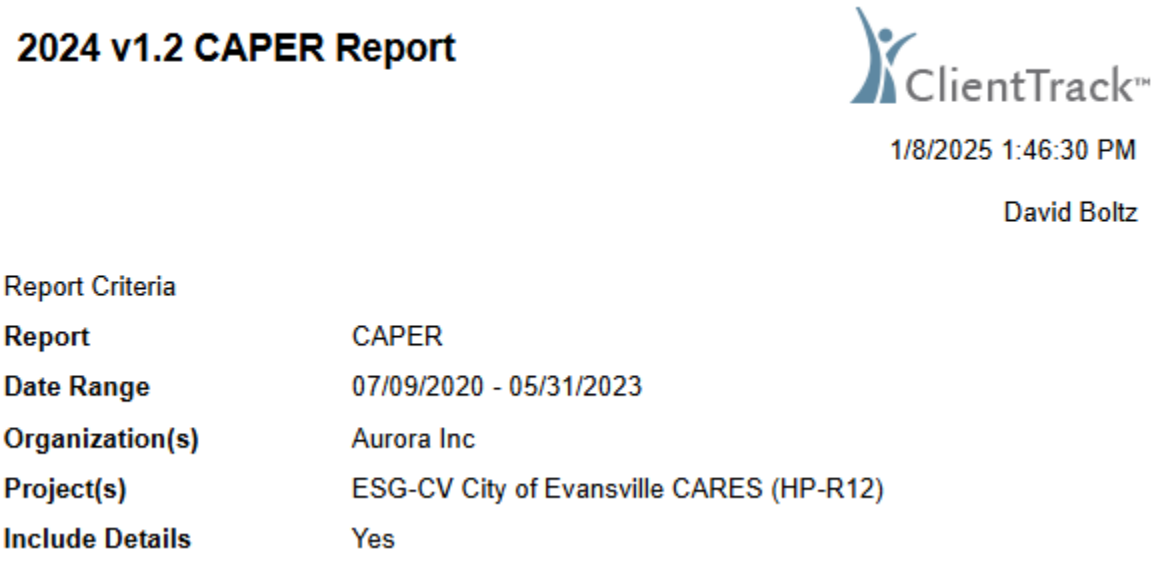
Please include as much relevant information in the request as possible:

- Date range and names of projects included
- Report type (CAPER, APR, Etc.)
- Screenshots of the issue without including PII

Snipping Tool

The Snipping Tool in Microsoft is an efficient way to share helpful information about a request.

1. In this example I will show you how to share a screenshot of a section of the CAPER report.
2. First provide information about the report that you ran.
3. To use the Snipping Tool, select **Windows + Shift + S**
4. Then, click and drag the cursor to select the section of your screen that you want to share. The image will be copied to your clipboard. Paste the image with the shortcut **Ctrl + V**



5. Next, locate the error that you want to resolve and repeat the process for taking a screenshot.

Q6a - Data Quality: Personally Identifiable Information

Data Element	Client Doesn't Know Prefers Not to Answer	Information Missing	Data Issues	Total	% of Issue Rate
Name (3.01)	0	0	0	0	0.00%
Social Security Number (3.02)	9	0	2	11	1.68%

6. Including screenshots in your ticket will help us replicate the error before providing next steps to resolve the error.
7. As a friendly reminder, please make sure to not include any personally identifiable client information in your screenshots.

Merge Requests

Our team will review the client profiles and keep the record with the most complete information. Providing information on which record has more complete or accurate information is useful to the HMIS team in making this decision, though other factors will also influence which record is kept.

- In general, records with family connections will be given priority, so records do not need to be moved over later.

  Tickets will be closed once the request is added to the merge queue.

- The changes will not appear immediately because the system will process the request during the evening.

Out of Office Reply

When our team is at limited capacity due to a conference or state holiday, we will set up an automatic response to new tickets letting you know that their may be a delay.

Ticket Tagging System

The help desk utilizes a ticket tagging system for assigning common requests. Using the following text in the subject line of your email will help assign and resolve tickets more quickly.

- Password Reset/ Reactivation (Password, Reactivate, Locked Out)
- New User Setups (new user, user agreement)
- Merge Requests (merge, duplicate)
- Account Deactivations (deactivate, no longer employed)
- CAPER and APR Issues (CAPER, APR)

Please email your respective helpdesk if you need additional assistance.

DVHelpDesk@ihcda.IN.gov

HMISHelpDesk@ihcda.IN.gov