Agency Technical Administrator Meeting

January 27, 2022

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ATA Meeting

- Introductions and Welcome
- Vendor updates
  - HMIS Vendor Migration/Contract
  - Operational Assessment
  - New ART BO 4.3 (UAT)
  - UNIT Manager
  - Data clean up efforts (Mass inactivation, CES exits, level 2 enrollment clean up)
- Security
  - User inactivation and re-training
- PIT
- HIC
- ATA Training Modules for new ATAs (Reminder and updates)
- DQ Process - Draft in process (internally) and we'll update/share as we get close
- Feedback for future meetings

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Introductions and Welcome

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Vendor updates

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HMIS Vendor Migration

All Chicago has decided to remain with WellSky as our HMIS vendor. Since the CoC Board voted in support of a migration to a new HMIS software almost 8 months ago, we have worked tirelessly with Bitfocus and WellSky to design a system that will meet Chicago's needs for real time data, robust reporting, and integrated, coordinated functionality. WellSky has committed to providing intensive support to Chicago to ensure we can more sufficiently meet Chicago's needs. They have also made substantial investment in their report writing software, ART. These enhancements will help reduce the difficulty experienced extracting data from HMIS in the past.

In the coming months we will develop a full work plan with Wellsky, complete intensive trainings on the latest functionality within ServicePoint and ART, and expand the suite of reports available for ATAs. The CoC is working to develop HMIS governance, and determine a process for custom data field requests.

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Items Identified During Migration Process

- Client records with no activity
- Enrollments at Agency level, not Program Level
- High number of old enrollments with no exit date
- Need to clean up ART folders and reports
- Need to consolidate Services items

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WellSky Operational Assessment

Areas of Focus:

- Training, including ATA Training
- Visibility improvements
- Data and Assessment Clean-up
- Data Entry Workflow
- Reporting

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WellSky Contract

Contract negotiations are progressing.

Considerations:

- Enhancement and expansion of Service Levels
- Pricing
- Access to training and professional services resources

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New Version of ART (BO 4.3)

ART is based on SAP Business Objects

New ART version is SAP Business Objects 4.3

Currently in UAT with limited access (including ATAs)

Client User Acceptance Testing (UAT) phase, now scheduled to run from January 24th, 2022, through at least the end of February 2022.

Reports created in old version generally work in new version without modification (Please verify and report any issues to helpdesk@allchicago.org)

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New Version of ART (BO 4.3)

Getting to Know 4.3 (View-License) Quick highlight of UI changes: layout, folders, what to QA.

https://wellsky.zoom.us/rec/share/-aQkGpr9rFiIZN6qUSBLX3eDQHhAVs5BA8-88slh07wFH4HcYdc5uqXuP0pldsA1.k63s9xTc8YHXCI0g

Password: !D6uX&sX

During your UAT activities, please note training opportunities that may be helpful to your users.

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LIVE Example

Unit Manager

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Unit Manager

WellSky is currently still working on an implementation of Unit Manager. Unit Manager is a replacement for ShelterPoint. We will communicate when we get access so we can prepare some live demos and training. Some changes include:

- New UI

- Mobility. Unit Manager's responsive design is optimized for tablets to facilitate data collection in the field.

- Ease of use. The new guided entry feature and simplified layout help staff or new volunteers use the system with less training and fewer errors.

- Alerts. You can configure the system to notify staff during check-in/check-out of first-time clients, previous incidents, or other important information.

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Unit Manager

Short Unit Manager Demo –

A short video overview of the features and improvements in Unit Manager version 1.5 can be found at
http://video.bowmansystems.com/videos/unitmanager/releases/UMv1.5.mp4

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Data Clean up

Data clean up efforts

Mass inactivation

CES exits (Recurring)

Level 2 enrollment clean up (Recurring)

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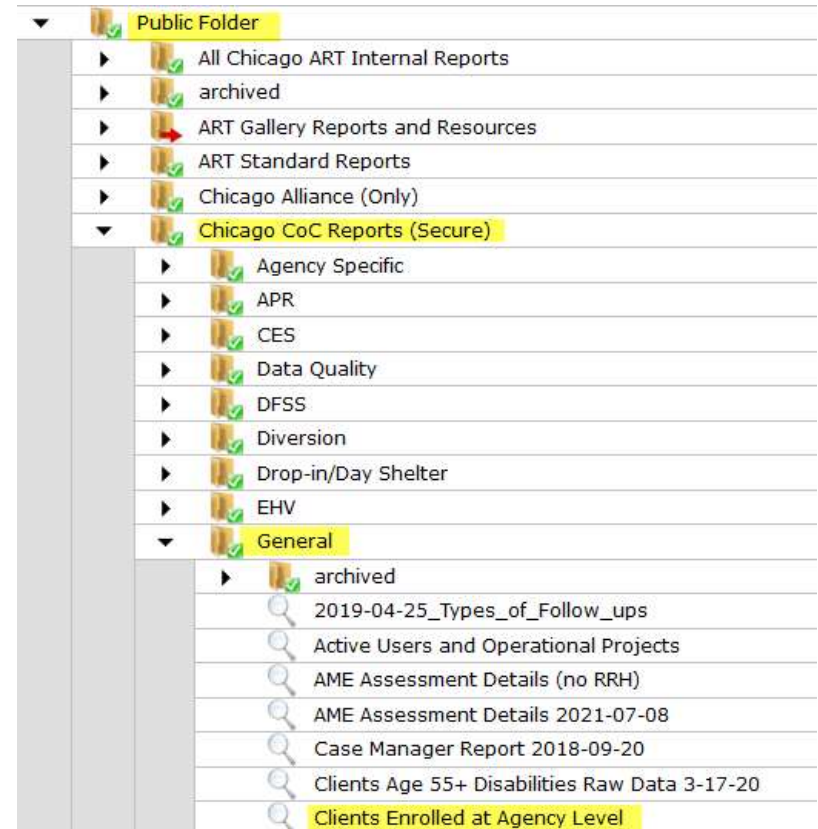
Security

Security

User Inactivation Policy

- 1 month – Inactivated request reactivation
- 6 months – Complete Intro to HMIS and request reactivation
- 1 year or longer – Complete Full training and request reactivation

Sharing Logins – Reminder: *Sharing logins goes against our terms of service and could result in loss of access.*

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Point in Time Count

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Point in Time Count Will Occur on Thursday, January 27rd

- Agencies that operate the following project types are requested to participate and update their ShelterPoint lists to reflect clients checked in for that night:

  - Emergency Shelter

  - Transitional Housing

  - Safe Haven (project type, not agency)

- These projects are asked to check in any clients staying tonight into their ShelterPoint list before 11:59pm. This means checking in clients that are new or checking out clients that have long since exited your project.

- The Point In Time (PIT) Training Course

  - https://allchicago.talentlms.com/shared/start/key:EQENHRKM

- Helpdesk ShelterPoint Guide

  - https://hmis.allchicago.org/hc/en-us/articles/212625426-ShelterPoint-Guide-

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2022 Housing Inventory Count (HIC)

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2022 HIC Process Reminders

- Pre-HIC Closed Yesterday, January 26 – if you are missing a submission, please complete it ASAP. **This includes all ES/TH/SH projects!**

- The 2022 HIC survey is only required for permanent housing providers. Please contact All Chicago if you are unsure about whether or not this survey is applicable to your project(s). The survey will be emailed out tomorrow.

  - HIC Surveys are due back by February 3. Details can be found here: *https://hmis.allchicago.org/hc/en-us/articles/4411552365332-2022-Housing-Inventory-Count-Process-Overview-Timeline*

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ATA Training Modules for new ATAs

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ATA Training Modules

ATA Training Modules

ATA Overview:
Agency Technical Administrators

Try it for free

Homeless Management Information System

Agency Technical Administrator (ATA) Webinar Series
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This Agency Technical Administrator (ATA) Webinar Series is designed to on-board new ATA and serve as a resource to those already in the role.

This series will start out explaining the expectations of ATAs and of the relationship your agency has with the HMIS Lead and the Continuum as a whole, eventually going on to cover reporting and the utilization of different tools in HMIS.

While everyone is invited to view the webinars, this series is most pertinent to those that are coming into the roll of an ATA or agencies looking to on-board into HMIS.

Content:
ATA Training: Context and Expectations
ATA Training: Administrative Tools
ATA Training: Reporting
ATA Training: Troubleshooting

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Data Quality Process Update

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Data Quality Process

HMIS is currently preparing a new Data Quality Process. We taken current reporting into account and attempted to reduce burden on providers. When we have something ready, we'll be sharing for feedback/discussion. Currently, we're hoping to have a DQ process start in March.

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Feedback

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Feedback for future meetings

We will be sending a form out to ask a few things:

What sort of things would you like to see in future ATA meeting?

Should we continue with the previously established bi-monthly meetings?

Are there any trainings you'd like to see from HMIS?

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Resources

- Help Desk - hmis.allchicago.org
- Talent LMS – hmis-allchicago.talentlms.com
- Contact us at: helpdesk@allchicago.org
- ATA Meeting notes: https://hmis.allchicago.org/hc/en-us/articles/4417247706004
- HIC Surveys are due back by February 3. Details can be found here: https://hmis.allchicago.org/hc/en-us/articles/4411552365332-2022-Housing-Inventory-Count-Process-Overview-Timeline
- The Point In Time (PIT) Training Course https://allchicago.talentlms.com/shared/start/key:EQENHRKM
- Helpdesk ShelterPoint Guide https://hmis.allchicago.org/hc/en-us/articles/212625426-ShelterPoint-Guide-
- Feedback survey: https://forms.gle/t5RZMSzbBKR4eTBA7

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