**Agency Admin Meeting**

November 22, 2019

1:00 – 2:30 PM

LC Rm 258

**Attendees:** Melissa Coloma, Pam Nyburg, Adele Berlinski, Carrie Copeland, Chris Pickering, Tami Kinman, Mike Fleck, Vanessa Moya, Gwen Barnes, Nicole Tarricone, Susanne Fendler, Melinda Zugelder, Shannon Smyth, James Ewell, Lise Stuart, Ernie Mackay, Lora Ashworth, Mirtha Strugo, Leonie Daniels, Foster Martinez, Bonnie Haight, Maria Cortez, Danielle Bautista, Diana Johnson, Teresa Roark, Amanda Borta, Casi Totten, Daphne Weller, Stacey Yates

* **Sign in**
* **New CE Admin Analyst** 
  + Lora Ashworth is the new Coordinated Entry Admin Analyst at Lane County she will be reviewing Front Door Assessments and housing referrals
* **What’s happening?**
  + WellSky System Migration
    - WellSky was not able to purge out Portland’s data prior to 10/01. So we went live with a copy of the system that Lane County had control over
    - November 8th WellSky ran a script on our system to pull the Portland data out. System was only supposed to be down for a few hours and ended up being down the whole day ☺
    - Reviewing the system after the script was run we identified that a few major projects of Lane Counties was purged also: Egan, Coordinated Entry, Barrier Busters. WellSky ran another script a few days later and added the projects back in.
  + Back date mode – the system option to exit back date mode when you exit the client is turned on. It can be turned off, which means you would have to exit yourself out of back date mode. Agency Admins will think about if they want this option on or off. This will be put on the January Agenda
  + Privacy script – Since ROIs were just purged from the system. Will continue with this process for a while longer before we discuss if the script needs to change. This will be put on the March Agenda.
* **ROIs**
  + All ROIs prior to 10/01 have now been purged from the system. Please make sure you are following the workflow (instructions are posted on the website). The privacy script is only read to the client one time for your agency. Once the ROI is documented for your agency, your agency does not have to read the privacy script to the client again.
* **Deactivated Users**
  + You **MUST** tell Lane County right away when a staff person no longer works at your agency or is in need of a ServicePoint license. Agency Admins can go in and deactivate the user but this must also be reported to the System Administrator. This is **VERY** important since ServicePoint can now be accessed from any device. We do not want someone who is no longer employed with your agency to be able to access the system once they walk out the door.
* **Changing agency data**
  + Do not go into other agency’s entry/exits and change the information
* **Client merges**
  + Lots of client merges have been done recently. If you search a client ID number and says the client is inactive, please search by name, ServicePoint numbers have probably been merged.
  + When sending merges to the helpdesk. If some of the demographics are different such as Name, DOB, SSN. Please verify what the correct information is supposed to be. We will not be able to merge if we don’t know what the correct information is.
* **ART licenses**
  + More ART licenses are available. Every Agency Admin will have an ART license. If there is other staff at your agency that you would like to have an ART license, one you can request one thru the help desk.
* **Point In Time count**
  + 2020 Point-In-Time count is on Thursday January 30th. All agencies are expected to participate. Surveys will be done electronically only. Will have more information about this at January meeting
* **Egan Warming Center**
  + Email went out that Egan is needs SericePoint licensed volunteers. If you are interested in volunteering please contact Tim Black 541-650-1445. If you volunteer at Egan you must use “Enter Data As” (7169) SVDP-L - Egan 2019 [SHAP] SHELTERPOINT. Please make yourself familiar with the Egan workflow. The training guides are posted on Lane County Website.
* **Next meeting**
  + January, doodle poll will be sent out.