**Agency Admin Meeting**

July 14th, 2021

1:00 – 2:30

Via Webinar

**Attendees:** Alyssa Hoekman, Kai Batalona, Sylvia Dean, Misty Inman, Melinda Zugelder, Josh Muller, Carl Kern, Megan Chandler, Roxann O’Brien, Daniel Dickens, Carrie Copeland, Jackie Low, Katie Dockery, Alice Jones, Susan Fendler, Molly Barnaby, James Ewell, Tami Kinman, Mirtha Strugo, Julie France, Teresa Roark, Sonya Spencer, Alex Dreher, Lisa Stuart, Zach Goodenough, Carly Taylor, Amy Cook, Mike Yoshioka, Summer Denney, Daphne Weller, Leonie Daniels, Tim Weese, Alexandra Becherer, Chris Pickering, Nick Sifuentez, Ryan Bronstad, Tracey Eppler, Marie Hickman, Hope Birrell, Jeffrey Albanese, Foster Martinez, Justin Baker, Theresa Koford, Amanda Borta, Kevin Douglas, Ilana Jakubowski, Samantha Adams, Noel Lamour, Ana Contreras, Mirtha Strugo,

**News/Updates – Agency Updates – add anything to the agenda**

* **New employee -** Melinda Zugelder - Admin Analyst EHV/Coordinated Entry
* **Freshdesk – Carly**
	+ **We purchased a ticketing software**
	+ **Phase one**
		- Still email the helpdesk. Little to no change on your end
		- HMIS team side your emails will be turned into tickets and assigned to staff person
		- We will be able to track if someone has responded to the email and set priorities
		- Emails from HMIS team might look a little different
	+ **Phase two**
		- Transfer Lane County website to Freshdesk
		- Create more training documentation
	+ **Phase Three**
		- Knowledge base available to all users
		- Will be able to submit a ticket from the Freshdesk website
* **Unit Manager – Melissa**
	+ **Here’s the deal**
		- Unit Manager has a great look to it but, right now it just doesn’t work. We have tested it out multiple times and each time we see something different. Trust us that we will not roll out a product that doesn’t work. When we are comfortable with Unit Manager will WE bring it to you. Once we are ready to get it into our training site we will have about 3 months to then roll it into the live site**.**
* **HMIS System Evaluation – Lise**
	+ WellSky is due for a system evaluation in the spring
	+ Ryan Bronstad Business Analyst from Lane County TS is joining the HMIS team. He will be working with us to determine current state workflows and business need of Lane County and agencies using HMIS.
* **Survey Goals – Carly**
	+ Improved guides and workflow documentation posted on new, easier-to-navigate website
	+ Quarterly (optional) training on being an agency admin/reporting
	+ HMIS training on project types offered at least once a year
	+ Give agencies information about what is included in new user orientation –will send out after agency admin meeting
		- User agreement: data privacy, login requirements, law enforcement policy
		- General login (resetting password) and navigation, back date mode
		- ClientPoint workflow
			* Searching for clients and adding new ones
			* Navigating client profile and updating demographics
			* Manage households
			* ROI and limited visibility
			* Create an entry and updating entry type
			* Overview of all questions included in UDE PLUS form (longest form) and commonly missed questions like Client Location and Prior Living Situation
			* Updating HUD verification tables (income, disabilities, etc)
		- How to update and delete entries
		- Exits – how and when
		- Brief overview of other tabs on the client profile
		- Reports – how to run the CAPER and errors in sections 6a-6c
		- Tableau – how HMIS data is used and why accurate data entry is important
		- Overview of Lane County HMIS website
		- Who to contact when you have questions
* **Next Meeting**
	+ September is the next meeting
	+ Doodle poll will be sent soon