June 2018 – Agency Admin Training (AAT) Notes

The first part of this document contains meeting notes from the Training. The second part contains relevant Q&As from the webinar session.

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1.) INTRODUCTION
   a. Attendees are responsible to share what they've learned with their agencies. Those agencies that could not attend have until 07/06/18 to take quiz and have it counted as attendance

2.) FEEDBACK
   a. You want APR training: See Feb. Agency Admin Training for a walkthrough. We will need to develop a more thorough training in the future!
   b. You want SPM training: We're doing this today!
   c. You want detailed instructions (progress notes): See online/in-person "Case Management" training or submit a ticket
   d. Complete survey results: https://www.surveymonkey.com/results/SM-H5KSS7VQL/

3.) UPDATE: 0252 Data Completeness Report Card (v18)
   a. Both Maricopa & BOS
   b. Users were reporting an error on the calculation for Non Cash Benefits and for Disabilities. The errors have been cleared in both reports.
   c. Remember: The "Data Completeness Report Card" is one of the required monthly reports that should be run on each program.

4.) UPDATE: New Training Requirements
   a. OLD: Each user is required to complete some/any training each year.
   b. NEW: In order for a user to keep their license active, users must complete all assigned trainings.
   c. Trainings may be assigned to all users or just those that serve particular program types or particular sub-populations.
   d. Impact:
      i. Users will have 30 days to complete any required training.
      ii. After 30 days, Agencies will be notified with users that have not completed their training. If the training is not complete 15 days after agency notification, the user account will be made inactive until they complete the training.
   e. Formal training notification:
      i. All training notifications will be done through the Agency Admin Training.
      ii. July 2018 All User Training:
         1. 07/09/2018: Training will be send via unique SurveyMonkey Link to users.
         2. 08/07/2018: Users must complete training
         3. 08/08/2018: Agencies will be notified of non-compliant users
         4. 08/21/2018: Non-compliant users deactivated until the completion of required training
   f. Topics:
      i. Additional HUD Disability option
      ii. Updated HUD Verification workflow when completing sub-assessments
      iii. MARICOPA ONLY: Updated privacy and security items

5.) UPDATE: All active ServicePoint-using programs will have name changes by end of June

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6.) TRAINING: System Performance Measures
    a. What are they?
        i. Key annual-reports introduced in 2015 by HUD to help understand how effective local programs are at addressing homelessness. <u>There are 6 different System Performance Measures</u>:
        Two measures of how "**rare**" homelessness is in our region:
        1) Number of persons served
        2) Number of new people in a system

        Two measures of how "**brief**" homelessness is in our region:
        3) Length of time homeless
        4) Increased income

        And two measures of how "**non-recurring**" homelessness is:
        5) Percentage of returns to homelessness
        6) Number of positive exits
    b. Caution: they are sophisticated reports and the complexity cannot be over-emphasized. *Take time to understand the report and your data*.
    c. Can be run <u>per provider</u> or <u>by reporting group</u>.
        i. Contact Help Desk if you notice irregularities (due to local modification)
    d. Tips on running SPM's
        i. SCHEDULE them, don't try to run
        ii. Download as EXCEL for easier DQ checks
        iii. Send us feedback
        iv. Schedule a custom 1:1 training if you need support

Q&A

Webinar Question	Answer
Regarding attendance – can I attend for all programs at my agency?	Yes. If you are representing your entire agency, that will mean you are responsible to disseminate what you learn to your whole agency (as their representative).
Can the 0252 report be scheduled to run on multiple programs at the same time?	Yes. This is one of the greatest benefits of this report. This allows you to report on the entire agency's overall report card, and also the individual report card for each sub-program. This is the report we use for the system-wide report cards!
If I run the 0252 report for multiple programs, would that require they all have the same start/end dates?	Yes. When you run for multiple programs, you can only select a single start/end period for the resulting output.
Will the Refresher Training topics be required for new users who just took their first training within the last months?	We will deal with this on a case-by-case basis. We will be sending the training to all users – but if a lead feels confident that the training is not relevant to their agency's users, or if they feel their users have mastered the topic, let the Help Desk know. We envision the trainings as only about 15 minutes in length.

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If my user becomes deactivated does that mean they are deleted and cannot come back to the system?	No. When an account is deactivated, it's just put in a state where the user cannot login. As soon as they complete the training, we would request they create a ticket notifying us the training is complete – then we'd reactivate the user's account.
Is there a schedule of what training will be coming?	We do not have this right now. We hope to have trainings that are "nimble" and respond to imminent data issues. We do anticipate at least an annual refresher training covering problems that apply to all users, but this is in process.
Can we get a copy of the System Performance Measures?	Yes – please create a ticket and request that we "Generate Existing Report" and let us know you'd like all the System Performance Measures for a certain program. If you have multiple programs in your agency, and would rather get training for some of your users to run the SPM's, request a "Custom Training".
What is the difference between "Reporting Group" and "Provider"?	In HMIS, there is an ability to create "Reporting Groups". When you run a report, you are given the option to give the names of Provider(s) or you can give the name of a Reporting Group (acts as a placeholder) which selects a bunch of programs automatically. For example, sometimes I run all emergency shelters in a county. Assuming I would need to run all ES in Coconino, if I setup a "Reporting Group" I'd name it "All ES in Coconino" and make sure it consists of those Emergency Shelters. Then in the future, I would just choose the "All ES in Coconino" Reporting Group when running a report. This item is not used much outside of System Administrator work (HMIS Team). However, some larger agencies request Reporting Groups for quick reporting of multiple programs.
Can we get a copy of today's PPT?	Yes.
Is there a cheat sheet on how to run the SPM?	We don't have this put together yet. The closest there is, is called "System Performance Measure Prompt Dates" from Mediware. If you're interested, start with this item.