

## ***Agency Administrator Roles and Responsibilities***

### ***Qualifications***

1. Working knowledge of Internet based applications.
2. Received Service Point training from a System Administrator.
3. Must Attend Agency Admin meetings every other month.

### ***Responsibilities***

1. Provide training and support to end-users in their agency.  
**Note:** If the Agency Admin is unable to resolve an HMIS issue, the Agency Admin should contact the HMIS Team at [HMIS@montgomerycountymd.gov](mailto:HMIS@montgomerycountymd.gov).
  - a. Assist End Users in the training registration process.  
**Note:** If the Agency Admin is unable to resolve a registration issue, the Agency Admin should contact Montgomery County IT at [HELPIT@montgomerycountymd.gov](mailto:HELPIT@montgomerycountymd.gov).
  - b. Change End User passwords as needed.
    - i. Instruct end-users on the forgot password button on the initial page of the HMIS website
    - ii. Remind end-users to type-in their username and not their e-mail.
    - iii. If the end user cannot get this to work, they should contact their Agency Admin to do a manual password reset
      1. From the left-hand panel, select the Admin button
      2. On the Admin Dashboard select User Admin
      3. Click Search – this will bring up a list of all of your Users. If your agency has several Users, you can type a name into the Search window to narrow your results.
      4. Click the pencil next to the User you want to reset.
      5. Click the button that says Generate Password. An alpha-numeric code is displayed; this is the temporary password. You can copy and send to User or type over with a more memorable code that is at least 8 characters long and has at least two numbers.
      6. Click Save and Exit.
      7. Notify the User of the new temp password and that they will be prompted to create their permanent password.
  - c. Grant/Remove Access to 'Enter Data As' for other Providers under your Agency.
    - i. Follow steps under "Responsibilities b. iii 1-4 above.
    - ii. Click on the Enter Data As Tab.
    - iii. Click Add Group.

- iv. Search for the Provider you want to give access to and click the version of the Provider that **does not say – “children included.”**
    - v. You can also remove access by clicking the red minus next to a Provider on this page (except for the default Provider).
  - d. Agency Admin must Notify the HMIS System Administrator within 48 hours of an end-user leaving their agency so that their account can be deleted
2. Monitor end users to ensure the following procedures are followed:
- a. HMIS Policy and Procedure  
([https://www.montgomerycountymd.gov/HHS-Program/Resources/Files/SNH/HMIS/Policy%20-%20Procedures/2022%20Updates/HMIS\\_Policy\\_Procedure\\_MD-601\\_FY21\\_FINAL.pdf](https://www.montgomerycountymd.gov/HHS-Program/Resources/Files/SNH/HMIS/Policy%20-%20Procedures/2022%20Updates/HMIS_Policy_Procedure_MD-601_FY21_FINAL.pdf))
  - b. County's Computer Policy  
(<https://mcgov.sharepoint.com/tebs/Documents/SecurityGuidelines-Rev20090401.pdf#search=Security%20policy>)
3. Maintain Resource Point to ensure program profiles are accurate and up to date. Agency Admin needs to update this once a year.
- a. Update Contact, Location, Service and Resource Information
    - i. From the left hand panel, select the Admin button.
    - ii. Select Provider Admin.
    - iii. Search for your Provider.
    - iv. Under the Profile tab, Agency Admin must make sure Location information and Contact information is accurate and up to date.
4. Maintain bedlists to ensure sufficient beds for the Provider.
- a. Update ShelterPoint
    - i. Contact the HMIS team before updating ShelterPoint so that we are aware
    - ii. Follow steps i. – iii. above.
    - iii. Click on Module Settings tab.
    - iv. Click on ShelterPoint module settings icon.
    - v. Click the Unit Lists Tab.
    - vi. Click the pencil next to your unit list.
    - vii. Click the black arrow next to “Floor” or whatever name the first tier shows.
    - viii. Click the arrow to expand “Room” or whatever name the next tier shows.
    - ix. If you want to remove beds, click trashcan to delete the beds you want removed.
    - x. If you want to add beds, type in the number of beds you want to add in the ‘Enter Number’ box and click on the Add New Units button.
    - xi. Scroll up and click Save and Exit.

**Note:** You will not see Client names/IDs here as this is the Admin set up for the bedlist and not the actual list.

- b.** Annuals and/or Seasonal updates to Standards Information tab; HUD Standards Information section and Bed and Unit Inventory sections if needed.
- 5. Maintain Provider Groups specific to the Agency.
- 6. Ensure that reports are run on a regular basis.
  - a.** APR – all end-users need to run this monthly.
  - b.** Client Served Report – all programs that use ShelterPoint should run this monthly. Programs without ShelterPoint should run as needed.
  - c.** Service Transaction Report – All programs that provide services should run this monthly.
  - d.** Daily Unit Report – All programs that use ShelterPoint should run this at least monthly.
  - e.** PATH report – All PATH programs should run this monthly.

According to the Montgomery County HMIS Policy and Procedures Manual, effective December 12, 2013, please note each Agency must have a minimum of two Agency Administrators designated. This policy is retroactive and will not be grandfathered in. The only two exceptions are (1) an Agency that has 1 worker and (2) an Agency that has only read-only access to the application. All other exceptions to this policy must be granted by the Homeless Administrator.

