



### End User License Request

This request must be completed and signed to request End User access to the Akron/Summit County HMIS. All End User Agreements, Training and Readiness Assessments must be completed and signed by the End User and HMIS Agency Administrator before a user ID and Password will be assigned.

|   |   |
|---|---|
| <b>Provider:</b>  |   |
| <b>User Name:</b>   |   |
| <b>Position/Title:</b>  |   |
| <b>Describe reasons for access to HMIS</b> (related to job responsibilities, be specific)                                   |   |
|   |   |
| <b>Login ID:</b>  |   |
| <b>Access Level:</b> (see attachment for descriptions) Check only <b>one</b> .  |   |
| ... Resource Specialist I<br>... Resource Specialist II<br>... Resource Specialist III<br>... Volunteer<br>... Agency Staff | ... Case Manager<br>... Agency Administrator<br>... Executive Director<br>... System Administrator I ( <i>UWSM only</i> )<br>... System Administrator II ( <i>UWSM only</i> ) |
| <b>User Expiration date:</b> (1 year from date assigned)  |   |
| <b>Additional Providers this user may enter data as:</b>  |   |
| Provider Name(s):   |   |
| Date Training Completed:  |   |
| Date Readiness Assessed:  |   |

\_\_\_\_\_  
User Signature

\_\_\_\_\_  
Agency Director Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

\_\_\_\_\_  
HMIS Agency Administrator Signature

\_\_\_\_\_  
Date

*Submit all completed documentation to the HMIS Administrator for license setup.*



### HMIS Access Levels Defined

|                                       |  |
|---------------------------------------|--|
| <b>Resource Specialist I Level:</b>   | Access is limited to ResourcePoint module. This role allows the user to search the database of area agencies and programs and view the detail screens for each agency or program. Access to client or service records is not given. A Resource specialist cannot modify or delete data.  |
| <b>Resource Specialist II Level:</b>  | The user can search the database of area agencies and programs and view the detail screens for each agency or program. Access to client or service records is not given. This person can update their own agency and program information.  |
| <b>Resource Specialist II Level:</b>  | Access is limited to ResourcePoint module. This role allows the user to search the database of area agencies and programs and view the detail screens for each agency or program. Access to client or service records is not given. This person can update their own agency and program information. This access level can also edit the system-wide news.   |
| <b>Volunteer Level:</b>               | Access to ResourcePoint module is limited, access to ClientPoint, and limited access to service records. A volunteer can view or edit basic demographic information about clients (the profile screen), but is restricted from viewing detailed assessments. A volunteer can enter new client records, make referrals, or check-in/out a client from a shelter. Normally, this access level allows a volunteer to complete the intake and then refer the client to agency staff or a case manager. |
| <b>Agency Staff Level:</b>            | Agency staff has access to ResourcePoint, limited access to ClientPoint, full access to service records and access to most functions in Service Point. However, Agency Staff can only access basic demographic data on clients (the profile screen). All other screens are restricted, including assessments and case plan records. They have full access to service records. Agency Staff can also add news items to the newswire feature. There is no reporting access.                          |
| <b>Case Manager Level:</b>            | Has access to all features excluding administrative functions. They have access to all screens within ClientPoint, including the assessments and full access to service records. There is full reporting access for all record open to them in ServicePoint.   |
| <b>Agency Administrator Level:</b>    | Agency Administrators have access to all features including agency level administrative functions. This level can add/remove users for his/her agency and edit their agency and program data. There is full reporting access for all record open to them in ServicePoint. They cannot access the following administrative functions: Assessment administration, Picklist Data, Licenses, Shadow Mode, or System Preferences  |
| <b>Executive Director Level:</b>      | Same access rights as Agency Administrator but ranked above Agency Administrator.  |
| <b>System Administrator I Level:</b>  | Same access rights to client information (full access) as Agency Administrator. However, this user has full access to administrative functions except Shadow Mode and System Preferences. <i>(UWSM only)</i>   |
| <b>System Administrator II Level:</b> | Full and complete access to the system. Can perform Shadow Mode for technical support. <i>(UWSM only)</i>  |