*Enter names of individuals responsible for each role.*

|  | **DURING** Onboarding | Effort | **AFTER** Onboarding | Effort |
| --- | --- | --- | --- | --- |
| **Project Manager** | Name: | **High** | Name: | **Varies** |
| **Primary contact for Bitfocus during the onboarding process.**  Oversees the customer side of the onboarding project. Coordinates project, migration, testing, communication, and training plans. Ensures onboarding roles are filled, decisions are made and documented, and that all customer-side work is delegated and completed. Works with Bitfocus onboarding team to maintain project schedule. | | May play a comparable role in any post-onboarding custom migration or other post-onboarding initiatives. | |
| **System Administrator** | Name: | **High** | Name: | **High** |
| Dives deep into Clarity Human Services functionality and configures the system to meet the needs of the community. Makes decisions about configuration and documents decisions. Understands HMIS workflows and identifies and implements strategies for customizing the site based on community feedback. **User acceptance testing: Responsible for reviewing data migration and system configuration for accuracy. Signs off on migrated data.** | | Maintains system, including ongoing configuration and updates. Learns about new Clarity features and helps the community decide whether to incorporate them. Continues to identify and implement strategies for customizing the site based on community feedback. | |
| **Privacy Officer** | Name: | **Medium** | Name: | **Low** |
| Works with system administrators to ensure that HMIS configuration meets local and regional privacy policies. Works with trainers to ensure that HMIS users understand privacy policies and practices in the context of new workflows. | | Works with system administrators and trainers to ensure that new HMIS initiatives meet privacy regulations. | |
| **HUD Subject Matter Expert** | Name: | **Medium** | Name: | **Low** |
| Works with system administrators and trainers to ensure that HMIS configuration and workflows meet HUD and other federal partner requirements for data collected and collection intervals. | | Ensures that all new HUD and federal partner requirements are incorporated into relevant HMIS screens and workflows. | |
| **Trainer** | Name: | **High** | Name: | **Medium** |
| Determines training needs and plans materials to meet needs. Provides Clarity Human Services training or coordinates training for all HMIS users as they transition to the new system. Understands HMIS workflows and helps users translate between old and new systems. | | Provides or coordinates training for new HMIS users and as a refresher for existing users. Plans and provides training and supporting materials for all users when new features are adopted by the community. | |
| **Communications** | Name: | **Medium** | Name: | **Low** |
| Develops a communication plan to keep all stakeholders informed during the onboarding process and change period. Drafts or coordinates all communication materials and ensures that they are provided according to communication schedule and that they meet specific stakeholder needs. | | Drafts or coordinates all communication materials to users and stakeholders during times of change such as new feature release or new feature adoption. Ensures that communications meet stakeholder needs. | |
| **User Support** | Name: | **High** | Name: | **Medium** |
| Responds to questions and support requests from HMIS users, ideally in real time. Requests may include initial setup, workflow issues, how-to questions, error resolution, policy questions, etc. Volume may initially be quite high. | | Responds to ongoing questions and support requests from HMIS users, ideally in real time. | |
| **Data Analysis** | Name: | **Medium** | Name: | **Medium** |
| Learns new tools to meet reporting and data analysis needs, including the Clarity Human Services report library and Clarity data analysis tools. Makes plans for meeting data needs during the transition period and determines the community's needs for custom reports. May need to provide system performance data after go-live to identify adoption issues. May participate in all data-related matters during the onboarding period. | | Uses established processes to meet reporting and data analysis needs. May need to produce ad hoc reports. | |
| **Coordinated Entry** | Name: | **High** | Name: | **Medium** |
| Oversees intersection between HMIS and coordinated entry. Identifies and conveys coordinated entry needs and ensures that key coordinated entry staff are involved in relevant conversations. Makes plans for meeting needs during the transition period. | | Learns about coordinated entry features and helps the community decide whether to incorporate them. Continues to identify and implement strategies for coordinated entry in Clarity based on community feedback. | |
| **IT** | Name: | **Medium** | Name: | **Low** |
| Ensures user workstations and infrastructure meets security requirements. May need to provide support around data migration. | | Provides ongoing maintenance of customer technical infrastructure. | |

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| **Additional Optional Roles** | **HMIS Oversight Committee** | **Executive Sponsor/Project Champion** | **HMIS Super Users** |
| Determines current and future community needs and develop plans and strategies accordingly. May also communicate with the community and help build buy-in. | May provide high level guidance to the project team, including decision making. Can champion projects to the broader community. | Users who are not system administrators but who engage deeply with HMIS. These users are sometimes lead HMIS staff at agencies or have other special roles and can provide a sophisticated user perspective. |