VESTA User Levels

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| A picture containing text, clipart  Description automatically generated MassachusettsUSER LEVELS | **General User Levels** | | | | **Management User Levels** | | |
| **Regular (basic)** | **Regular Plus Reports** | **Reports Only - Limited** | **Supervisor** | **CoC Staff** | **User Support**  **HMIS Staff** | **HMIS Admin** |
| View client records – see all client data in assigned project |  |  |  |  |  |  |  |
| Add new client records and add, edit, update client record information. |  |  |  |  |  |  |  |
| Run Reports |  |  |  |  |  |  |  |
| Delete Data |  |  |  |  |  |  |  |
| Create user accounts and access support functions. |  |  |  |  |  |  |  |
| Manage Front End Projects Set up/edit |  |  |  |  |  |  |  |
| Run unduplicator - clean data |  |  |  |  |  |  |  |
| Access system wide HUD reports (SPM, LSA, etc.) |  |  |  |  |  |  |  |
| Access to CoC - dashboard |  |  |  |  |  |  |  |
| Place system messages in VESTA |  |  |  |  |  |  |  |
| Lock and Unlock data fields |  |  |  |  |  |  |  |
| Authorize changes in VESTA |  |  |  |  |  |  |  |

# VESTA - HMIS Member Agency User Levels

The agency director or designee may allow a staff person access to one or more projects in VESTA, as is appropriate for the individuals job/position at the organization. For each project, the staff member must be designated as one of the general user levels. A staff person may have different levels in different projects. It is recommended only to provide staff with the level needed for their position/activities in the organization.

# VESTA – HMIS Partner Projects Access/User Levels

Two or more projects may have a data sharing partnership relation in VESTA. An organization may elect to have an **internal partnership** where all or some of the staff of their agency view or add/edit client records across all projects in the agency. **External partnerships** are also able to be established when two different organizations share common clients in a single project. For example, if a housing provider has a relationship with a service provider to serve all the clients in a particular project a partnership agreement is established between the agencies for to be able to access the same project in VESTA. During the establishment of the data sharing agreement the agencies should determine the user level access for the project. Once that agreement is established the agency director may approve staff from one agency to work with the data from another agency.

# VESTA – CoC and HMIS Leadership User Levels

## CoC Staff

CoC staff should have CoC Stafflevel access to all “Continuum/HMIS” projects in the system. This will allow them to generate reports by individual projects, project types or all Continuum/HMIS projects; and be able to view all Front-End Project information in the system.

CoC staff are never able to enter or edit data in a member agency’s project. If a CoC staff member is “operating” or “supervising” a project in the community, they should be given an appropriate general user level as needed for them to perform their responsibilities for that project.

CoC staff will not have access to custom created projects of an individual member agency that are not designated as HMIS projects unless that agency specifies CoC staff access in their project set-up plan.

## HMIS Staff

HMIS staff are the managers of the HMIS implementation of VESTA in the Balance of State Continuum of Care (MA-516). In general, HMIS staff should be provided the User Support –HMIS Stafflevel in VESTA. This will allow them to view all records in the system, generate all reports, set up users, and manage the front-end. There should be only one or two staff people designated as the HMIS Administrator for MA-516. That staff will have additional system functionality available to them in VESTA.

# General User Level Security Principle

Many aspects of user level security are controlled on a **per-project** basis. All forms in VESTA are marked with a security level symbol:

Green level data is shared across all projects in VESTA for projects serving the client.



Yellow level data may be shared among partner projects.



http://localhost/vesta/imgs/no_share.gif Red level data is displayed only to users able to view/edit data in the project.

# Client Review Page \Security

1. Access to the client review page is granted systemwide to user levels allowed to see client records.
2. If a user level can access the client review page, the user is able to see all tabs on the page. There is no ability in the HMIS implementation to limit tab visibility according to user level. In other words, a user level can either **view** the **entire** client review page, or **none** of it.
3. Each tab of the client review page has separate settings for which user levels can **add** and which users can **edit** data for that tab.

# Data Sharing Agreements

Data sharing agreements (DSAs) have several options which can provide or prohibit the following features:

1. DSAs control the visibility of clients when performing an “agency search” in VESTA. Projects can share client records such that a client served exclusively by project “A” can be found when searching in project “B” even if the client does not have a consent on file.
2. DSAs control the visibility of yellow level This section of data is shared with your partner programs.data on the client review page. Tabs with this level of sharing will automatically display data entered on this client by other projects in the DSA.
3. In general, a user level able to edit data in a particular project may only edit data created *by that project.* DSAs do not allow the editing of data belonging to one project by user at another project; the user must directly be a member of the project with the data.
4. DSAs do not specify which user levels can view data. If a user level can view the client review page in a particular project, that user level will see the same data on that page as any other user level in the same project.