

Welcome to the HMIS Client ROI and Policy Documents Updates Webinar.
We will be putting the link to the slides and documents in the chat.



Zoom Information

Please make sure that your audio is muted

Please use the Q&A feature to submit questions

This meeting is being recorded

The slides and recording will be posted to our website

HMIS Staff

Trevin Flickinger
HMIS Data Analyst

Monica Tillis
System Administrator

Matt Dicks
System Administrator and
Training Specialist

Carolyn Hoffman
System Administrator

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Joining us today from the COHHIO HMIS team are Trevin Flickinger, Monica Tillis, Matt Dicks, Carolyn Hoffman.

Also in attendance are Erica Mulryan from the Ohio Balance of State CoC and Colleen Kosta from the Mahoning County Homeless CoC.

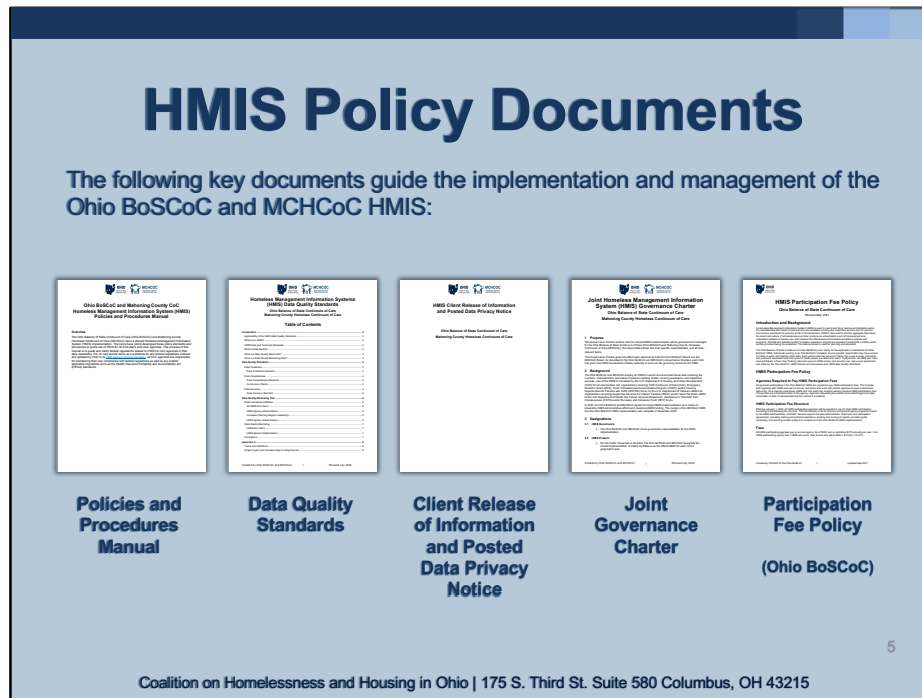
Agenda

- HMIS Policy Documents
- Why Change Things?
- Client ROI Changes
- R minor Elevated Privacy
- Joint HMIS Governance Charter
- Reminders about Protecting Client Data

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Here are the topics we are going to cover today.



All HMIS policies and key documents are reviewed annually and revised as needed. The Data Quality Standards and Participation Fee Policy have had no recent significant updates.

Policies and Procedures Manual

Reiterates HUD Standards and clarifies CoC specific rules

Data Quality Standards

Identifies reporting and performance requirements of HMIS program data

Client Release of Information and Posted Data Privacy Notice

Provides information to clients to help them understand what they are providing permission for when providing their data

Documents client permission to collect their personal data and enter in HMIS

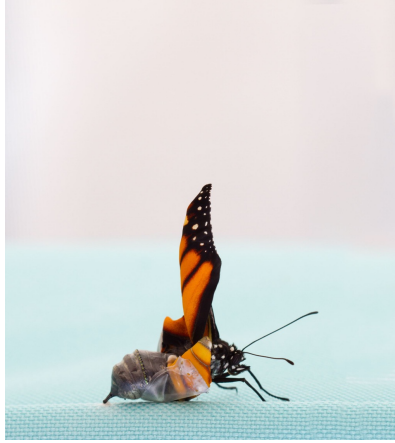
Joint Governance Charter

Outlines how the shared HMIS implementation is governed and the roles/responsibilities of specific entities and bodies

Participation Fee Policy

This document applies to the Balance of State only. It details the costs for providers for HMIS participation and how those charges are determined

Why Change Things?



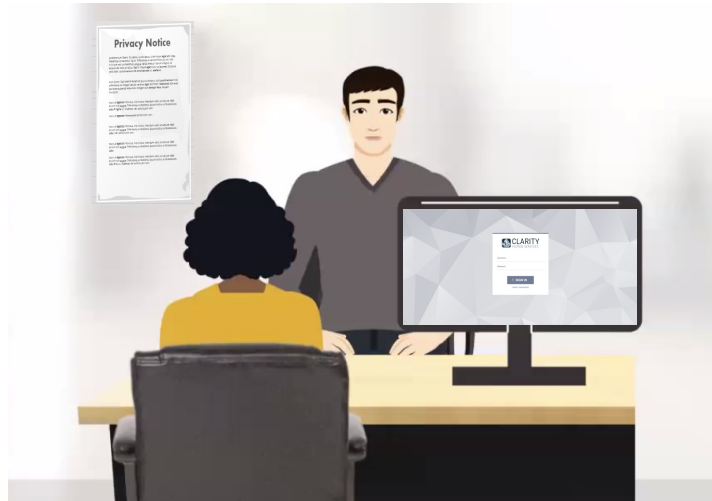
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During our migration to Clarity, we received support from HUD Technical Assistance. During this process, they also worked with us to review our HMIS policies, training materials, and documents.

HUD TA made recommendations for changes based on best practices. Next, we will review some of the principal changes

Client ROI Changes

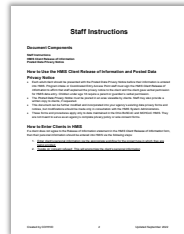


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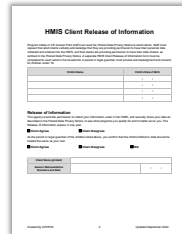
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Based on guidance from HUD technical assistance, our CoC's elected to end the requirement to have clients sign HMIS releases of information. Instead, we will utilize a Posted Data Privacy Notice, staff explanation of the Posted Data Privacy Notice to clients, and staff signature affirming that the client gave verbal consent.

Client Release of Information and Posted Data Privacy Notice Document



**Staff
Instructions**

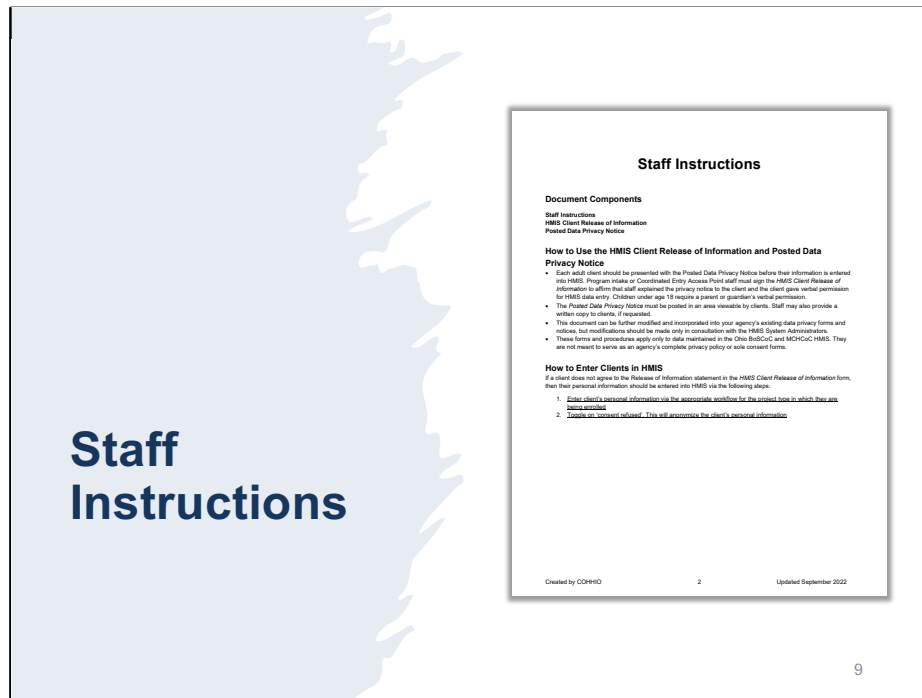


Client ROI



**Posted Data
Privacy Notice**

The updated Client Release of information contains three parts; Staff instructions, Client ROI, and Posted Data Privacy Notice.



The first page of the document contains Staff instructions for completing the ROI. When completing an ROI:

Agency staff explain to clients why their data is being collected, who has access to the data in HMIS, and how the data is protected and kept private, as outlined in the Posted Data Privacy Notice.

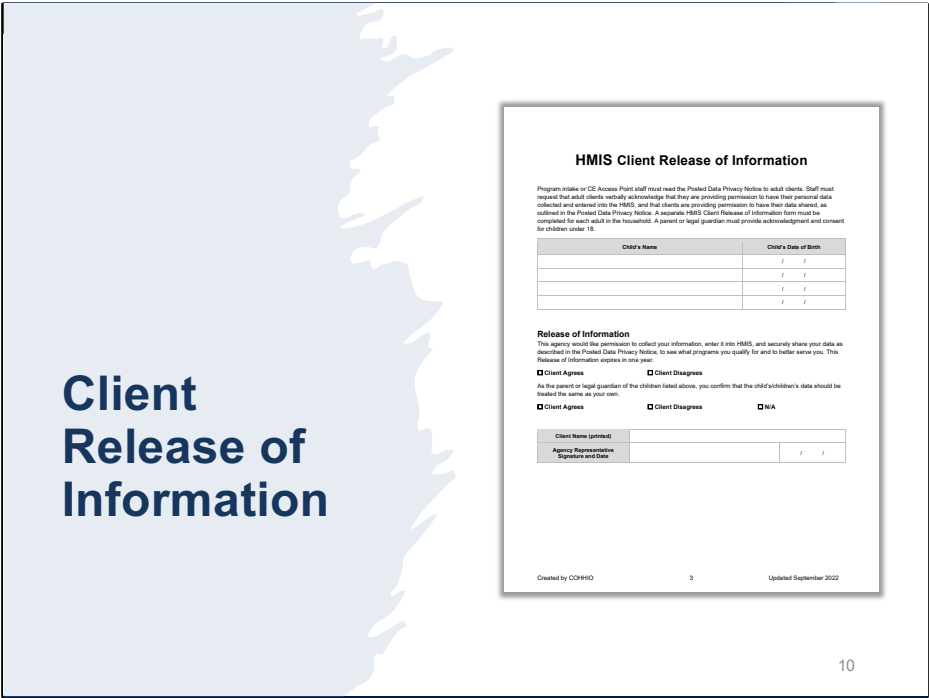
Then staff ask for client agreement to having their data collected and entered in HMIS. This process is the same whether in person or over the phone.

Staff sign the ROI form affirming the client provided verbal consent.

One ROI is completed with each adult household member.

Adults grant consent on behalf of their minor children.

Clients may still refuse data collection and/or entry in HMIS. If the client refuses, the client's data is entered anonymously.





The second page of the document is the ROI form. This is the form staff will sign to acknowledge client’s consent for data collection and entry.

Client Test

PROFILE HISTORY PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION

RELEASE OF INFORMATION

Permission	Yes	▼
Start Date	05/22/2024	
End Date	05/22/2025	
Documentation	Signed Paper Document	▼
Location	<div>in locked filing cabinet</div>	
Agency Name	System	
Staff Name	Carolyn Hoffman	
Date Entered	05/16/24 01:27 PM	

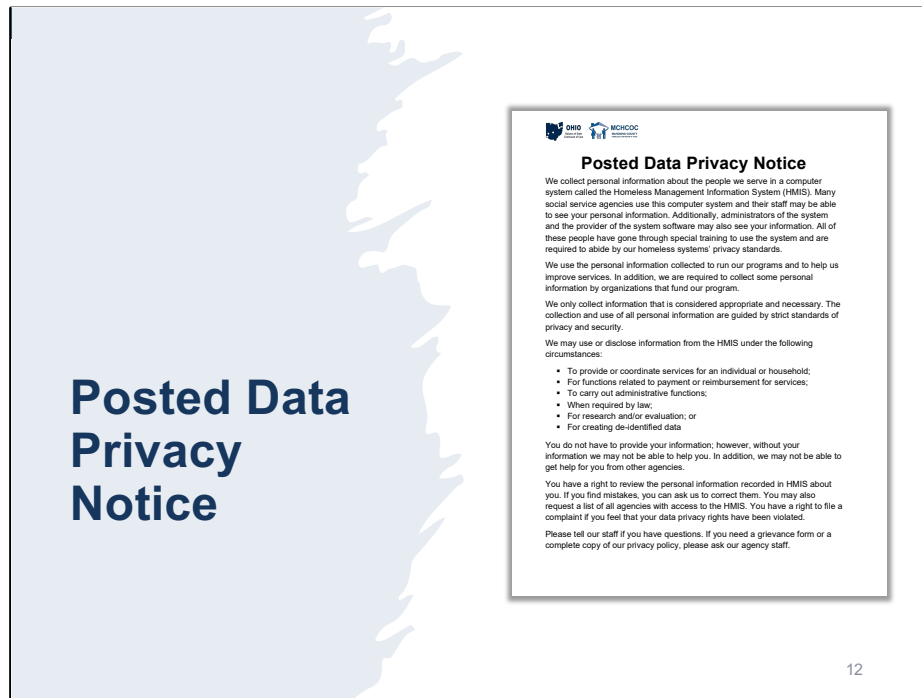
SAVE CHANGES

CANCEL

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There is no change to how the client ROI is entered in HMIS.



The third page of the document is the Posted Data Privacy Notice. The Posted Data Privacy Notice has been updated and expanded. All staff should review the updated notice and make sure it is visibly posted in client intake areas.

We expect agencies to update documents and begin using the new ROI process as soon as possible, but no later than July 1st, 2024.

R minor Elevated Privacy



- Sharing Rme Data for Service Coordination
 - Veteran Active List
 - Prioritization Report
- Under special circumstances Non-HMIS Users may obtain authorization to access Rme from COHHIO HMIS System Administrators



- Sharing Rme in meetings that are not part of service coordination
 - Exception: Meeting is covered by appropriate agreements and/or ROIs
- Individuals sharing login information with others

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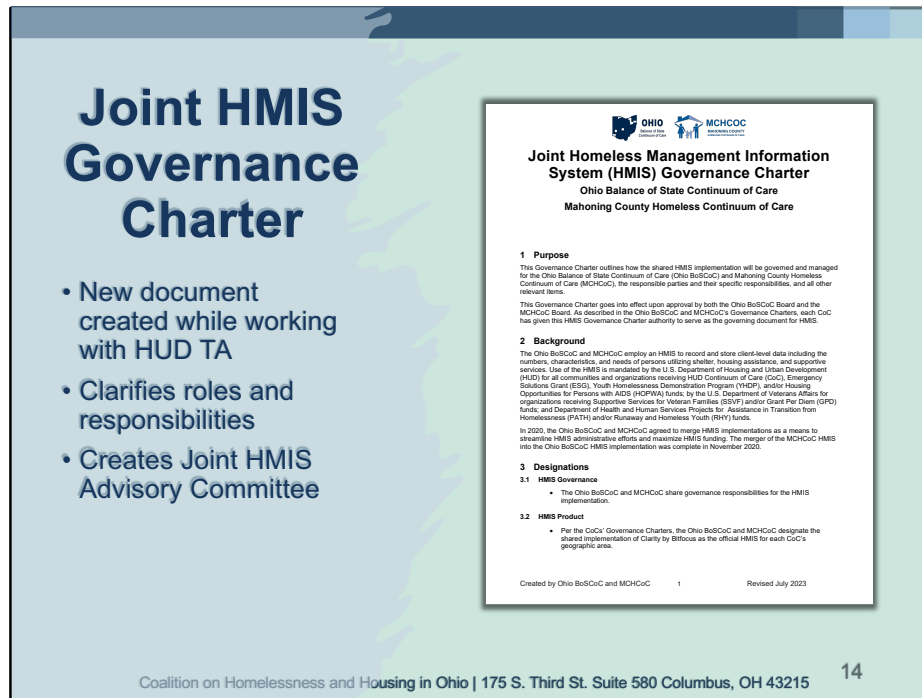
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Another revision that came out of our policy work was an adjustment to R minor Elevated access.

R minor Elevated data can be shared for the purposes of service coordination. This includes the use of reports like the Veteran Active List and the Prioritization Report. Under special circumstances, Non-HMIS Users may obtain authorization to access Rme from COHHIO HMIS System Administrators.

Sharing of Rme data in meetings outside of service coordination is prohibited unless appropriate agreements and/or ROIs are in use.

As a reminder, users should not share login information with others.



The Joint HMIS Governance Charter was created through the advisement of HUD Technical Assistance.

The document clarifies roles and responsibilities of various entities related to HMIS including:

- HMIS Leads
- HMIS System Administrators
- CoCs

The document also outlines the structure of the The Joint HMIS Advisory Committee which reviews and revises HMIS governing and management documentation. This committee also serves in an advisory capacity to HMIS System Administrators.

Reminders about Protecting Client Data

Why do we collect Personally Identifiable Information (PII)?

Who has access to client PII in HMIS?

How can we communicate about clients in a safe way?

Who can access HMIS?

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Why do we collect PII (Name/DOB/SSN)?

PII or Personally Identifiable Information includes data like name, date of birth, and social security number.

PII is collected only for the purposes of uniquely identifying clients for service coordination and reducing duplicates across the system.

Who has access to client PII in HMIS?

HMIS End Users, COHHIO HMIS Staff, CoC Staff, and HMIS vendor staff have access to client data.

How can we communicate about clients in a safe way?

Sharing client PII via fax or phone may be appropriate between certain agencies.

Emailing client PII is permitted via secure IntraMail or with a third-party encrypted email product. As a reminder, do not email client PII to the HMIS Help Desk.

Who can access HMIS?

Login access is only for HMIS authorized users.

Login access must never be shared between authorized users.

When using HMIS, computer needs to be in a private or supervised area.

Document Links

Policy and Standards Documents

<https://hmis.cohhio.org/index.php?pg=kb.book&id=7>

Client Release of information and Posted Data Privacy Notice

<https://hmis.cohhio.org/index.php?pg=kb.page&id=60>

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Here are the links to the updated policy documents.

Questions



email HMIS at
hmis@cohhio.org

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Please make sure to share the recording and materials from this training with staff at your agency, who were not able to attend this webinar and will completing ROIs with clients.

The HMIS User Licensing Course has been updated with this information. The course is used for both new user training and annual renewal.