Durham CoC
HMIS User Meeting

June 2019
Agenda

System Updates:
Privacy Documentation
NCCEH Website Changes
HMIS Data Collection Forms
Questions, Concerns, Feedback

What’s Next Calendar:
July HMIS Users Meeting
Definition of Common Terms
# Common Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Acronym</th>
<th>Definition</th>
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<tbody>
<tr>
<td>Continuum(s) of Care</td>
<td>CoC</td>
<td>Planning body charged with guiding the local response to homelessness. The CoC is responsible for designating the HMIS Lead Agency to operate HMIS and participating in the structures (Advisory Committee) to oversee effective operations of HMIS.</td>
</tr>
<tr>
<td>Homeless Management Information System</td>
<td>HMIS</td>
<td>A data system that meets HUD’s HMIS requirements and is used to measure homelessness and the effectiveness of related service delivery systems. The HMIS is also the primary reporting tool for HUD homeless service grants as well as for other public streams of funding related to homelessness.</td>
</tr>
<tr>
<td>HMIS@NCCEH</td>
<td>HMIS</td>
<td>The HMIS implementation for Durham, NC Balance of State, and Orange Continuums of Care. HMIS@NCCEH is operated by the North Carolina Coalition to End Homelessness. <a href="https://www.ncceh.org/hmis/about/">https://www.ncceh.org/hmis/about/</a></td>
</tr>
<tr>
<td>Personally Identifying Information</td>
<td>PII</td>
<td>Personally Identifiable Information is a category of sensitive information that is associated with an individual. It should be accessed only on a strict need-to-know basis and handled and stored with care.</td>
</tr>
<tr>
<td>ServicePoint</td>
<td>SP</td>
<td>HMIS Software developed and managed our vendor, WellSky, to fulfill HUD’s HMIS requirements.</td>
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</table>
Defining Privacy, Security, and Consent
Principles

Confidentiality / Need to Know

Choice / Consent

Right to Refuse

Balance

More disclosure, More risk
Documents and Tools
HMIS Privacy Sign

Agencies must post the HMIS Privacy Sign at the intake or comparable location, with general reasons for data collection and reference to the privacy policy.

We collect personal information about people we serve in a computer database called the Homeless Management Information System (HMIS). The information we collect helps us run programs, improve services, and better understand your needs. Some of the information we collect may be required by organizations that fund the operation of this program. We only collect information that is needed or required.

Some or your information may be shared with other organizations to coordinate referrals, housing, or services. Those other organizations also have privacy policies to protect your personal information. You have the right to tell us we should not make your information that is entered into the database visible to other agencies in HMIS.

If you have any questions or would like to see our privacy notice, please ask one of our staff.
HMIS@NCCEH Privacy Notice

PRIVACY NOTICE
THIS NOTICE DESCRIBES HOW YOUR PERSONAL INFORMATION MAY BE USED/DISCLOSED, AND HOW YOU MAY OBTAIN ACCESS TO THIS INFORMATION. PLEASE REVIEW IT CAREFULLY.

Agency Name: 

This Notice describes the privacy practices of our agency with respect to our use of the Homeless Management Information System administered by the North Carolina Coalition to End Homelessness ("HMIS").

HMIS: We participate in a regional system that allows shelters and other homeless service providers to share information about the people we serve. HMIS keeps information about clients that get help in each participating agency to better assist you.

Through HMIS, we and other agencies can share your name, year of birth, age, gender, veteran status, and partial SSN without your permission (your "Standard Information"), unless you indicate on the HMIS Release Form that you do not want your Standard Information to be visible or tell an agency to close your "Profile/Name." We and the other agencies can collect, use and share any additional information you consent to share when you fill out the HMIS Client Release of Information (ROI). This Notice informs you as to how we and HMIS treat the personal information we collect, use, and share with other agencies.

Personal and Health Information: When you receive services from us, we share your Standard Information on HMIS with other agencies, unless you tell us not to as provided above. If you choose to sign the ROI, we will also share your information, which may include personal health information and information about your race, ethnicity, disabling conditions, previous residence history, employment history, substance abuse, sexual orientation, educational history and more. Your Standard Information and any information you release in your ROI is referred to as your "Personally Identifiable Information." This information will be visible in HMIS and may also be exchanged on paper, verbally or electronically based on uses and disclosures below.

How We May Use and Disclose Your Personally Identifiable Information: We may use and disclose your Personally Identifiable Information only for the following purposes:
HMIS@NCCEH Privacy Notice

Actions for Agencies

- Insert your Agency Name

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Agency Name:

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HMIS@NCCEH Privacy Notice

Actions for Agencies

- Identify your Agency Contact Person

Changes in Privacy Practices: We reserve the right to change our privacy policies and the terms of this Notice at any time and to make the new policies and provisions effective for all Personally Identifying Information, even with respect to the information processed before the amendment.

You have the right to obtain a paper copy of our Notice at any time upon request.

Agency Contact: To make a complaint or ask a question about our privacy practices, contact:
Contact __________________________ at __________________________

Effective Date: The effective date of this Notice is June 7, 2019.

HMIS@NCCEH Privacy Notice v.06.19
HMIS@NCCEH Privacy Notice

- All staff within an agency using HMIS must have read and understood the Privacy Notice
- Staff must provide the Privacy Notice to the client upon request and explain it
HMIS Privacy Notice

Questions, Concerns, Feedback?
HMIS@NCCEH Release of Information

HMIS CLIENT RELEASE OF INFORMATION

Agency Name: 

Last Name: | First Name: | Middle Initial:  

Staff Completing Assessment: | Date of Birth (mm/dd/yyyy): | Date of Assessment (mm/dd/yyyy):

Introduction: Protecting your information is important to us. This document outlines how we use and protect your information. Many North Carolina shelters and helping programs use the Homeless Management Information System managed by North Carolina Coalition to End Homelessness (HMIS) to keep information about people they help. This form defines which client data is entered into HMIS and how those data are shared between agencies. In addition, a coordinating group is a locally created group that meets regularly to identify homeless persons and develop strategies for housing them. A full list of the participating providers in this area can be found at ncceh.org/hmis/clientconsent.

The included agencies will collect personal information directly from you and your household to determine your eligibility for services and connect you with other helping agencies. Agencies only collect personal information that is considered appropriate for getting you housed. The collection and use of all personal information is guided by strict standards of confidentiality.

We will only use your information to benefit you in the following ways:

- To provide or coordinate services on behalf of an individual or household;
- For payment or reimbursement for services;
- To carry out administrative functions, including but not limited to oversight and management functions; or
- For creating summary reports without identifying you or confusing you with someone else.
# HMIS@NCCEH Release of Information

## Actions for Agencies

- Fill in your Agency Name before printing

## HMIS CLIENT RELEASE OF INFORMATION

<table>
<thead>
<tr>
<th>Agency Name:</th>
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<tr>
<th>Staff Completing Assessment:</th>
<th>Date of Birth (mm/dd/yyyy):</th>
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**Introduction:** Protecting your information is important to us. This document outlines how we use and protect your...
## HMIS@NCCEH Release of Information

### Introduction

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### HMIS Client Release of Information

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<td>Date of Assessment (mm/dd/yyyy):</td>
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<td>Staff Completing Assessment:</td>
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**Table:**

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<th>Agency Name</th>
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Introduction

"This document outlines how we use and protect your information ... Agencies only collect information that is considered appropriate for getting you housed."
Allowable Uses:

- To provide or coordinate services on behalf of an individual or household;
- For payment or reimbursement for services;
- To carry out administrative functions, including but not limited to oversight and management functions; or
- For creating summary reports without identifying you or confusing you with someone else
Client info *should* be used for:

- Completing enrollments and assessments for clients served by the agency
- Referring clients to other services and/or agencies
- Creating case notes and tracking client progress
- Coordinating services for a client
HMIS@NCCEH Release of Information

Client info *should* be used for:

• Completing enrollments and assessments for clients served by the agency
• Referring clients to other services and/or agencies
• Creating case notes and tracking client progress
• Coordinating services for a client

Client info *should not* be used for:

• Personal gain
• Bias opinions
• Fraud
• Stalking
• Sharing with others outside of services providers
• Curiosity
HMIS@NCCEH Release of Information

What's Allowed with Who?

Sharing Data within your Agency
  • Agencies may infer consent for uses in the posted Privacy Notice and written Policies and Procedures.
HMIS@NCCEH Release of Information

What's Allowed with Who?

Sharing Data within your Agency

• Agencies may infer consent for uses in the posted Privacy Notice and written privacy policy.

Consent to visibility in HMIS but outside of your Agency

• Section 1 - Standard Information (Profile info shared for search)
• Section 2 - HMIS Data Visibility within Coordinating Group
HMIS@NCCEH Release of Information

What's Allowed with Who?

Sharing Data within your Agency
  • Agencies may infer consent for uses in the posted Privacy Notice and written privacy policy.

Consent to visibility in HMIS but outside of your Agency
  • Section 1 - Standard Information
  • Section 2 - HMIS Data Visibility within Coordinating Group

Consent to share outside of HMIS and outside of your Agency
  • Section 3 - Coordinating Group
HMIS@NCCEH Release of Information

Three sections extend Consent over more data to more partners

Section 1 - Standard Information
Visible across HMIS@NCCEH

Section 2 - HMIS Data Visibility
Visible across HMIS Visibility Group

Section 3 - Coordinating Group
Share across Coordinating Group outside of HMIS
Consent to visibility in HMIS but outside of your Agency

SECTION 1 – HMIS Standard Information

Standard information can be seen by all North Carolina agencies that use HMIS. This information allows us to select the correct record and to better coordinate services for you. All persons using HMIS are trained and certified in privacy.

What information is shared about you in HMIS?
- Name
- Age/ year of birth
- Veteran status
- Gender
- Partial social security number

If you have a privacy concern you can ask to close this information so that only our Agency can see this information.

SECTION 2 – HMIS Data Visibility

Our agency has agreed to share information on clients in HMIS with other agencies. This means that your information will be visible to users from those other agencies in HMIS. A list of agencies we share with can be found by looking up our agency name at: ncceh.org/hmis/clientconsent.
Consent to visibility in HMIS but outside of your Agency

Section 1: Standard Information

Client details visible for search and deduplication purposes:

- Name
- Age / Year of birth
- Gender
- Veteran Status
- Partial Social Security Number
Consent to visibility in HMIS but outside of your Agency

Section 2: HMIS Data Visibility

SECTION 2 – HMIS Data Visibility
Our agency has agreed to share information on clients in HMIS with other agencies. This means that your information will be visible to users from those other agencies in HMIS. A list of agencies we share with can be found by looking up our agency name at: ncceh.org/hmis/clientconsent.

What information is shared about you in HMIS with these other agencies?
- Demographic information (e.g. race, veteran)
- Income and benefit information
- Disability information
- Program enrollment, needs and services
- Homeless history
- Domestic violence status
- Housing assessment (e.g. VI-SPDAT)

SECTION 3 – Coordinating Group
Our agency shares information with several agencies through a local coordinating group, designed to coordinate care for you. This means that your information may be discussed verbally, in writing, electronically, or in documents downloaded from HMIS. A list of agencies in this coordinating group may be found by looking up our agency name at: ncceh.org/hmis/clientconsent.
Consent to visibility in HMIS but outside of your Agency

Section 2: HMIS Data Visibility

Additional information is visible in HMIS according to agency agreements. Examples:

- Regional sharing groups
- Coordinated Entry sharing groups
- Special population sharing groups (Vets, Chronic Homelessness)

Agencies included in HMIS Data Visibility groups can be found at ncceh.org/hmis/clientconsent.
Consent to visibility in HMIS but outside of your Agency

Section 2: HMIS Data Visibility

What information in HMIS is visible for these agencies?

- Demographic information (e.g. race, veteran)
- Income and benefit information
- Disability information
- Program enrollment, needs and services
- Homeless history
- Domestic violence status
- Housing assessment (e.g. VI-SPDAT)
HMIS@NCCEH Release of Information

Consent to share outside of HMIS and outside of your Agency

Section 3 - Coordination of Services

SECTION 3 – Coordinating Group

Our agency shares information with several agencies through a local coordinating group, designed to coordinate care for you. This means that your information may be discussed verbally, in writing, electronically, or in documents downloaded from HMIS. A list of agencies in this coordinating group may be found by looking up our agency name at: ncceh.org/hmis/clientconsent.

Information possibly included in case conferencing:

- Demographic information (e.g. race, veteran)
- Income and benefit information
- Disability information
- Program enrollment, needs and services
- Coordinated entry notes
- Homeless history
- Domestic violence status
- Housing assessment (e.g. VI-SPDAT)
CONSENT TO SHARE OUTSIDE OF HMIS AND OUTSIDE OF YOUR AGENCY

Section 3 – Coordinating Group

- This means that client information may be discussed verbally, in writing, electronically, or in documents downloaded from HMIS.
- Use and disclose information to identify appropriate resources and services.
- Use and disclose information to determine participant prioritization for housing.
- Use and disclose information to make referrals.
- Use and disclose information to determine participant progress.
HMIS@NCCEH Release of Information

Consent to share outside of HMIS and outside of your Agency

Section 3 – Coordinating Group

What information possibly shared with these agencies?

- Demographic information (e.g. race, veteran)
- Income and benefit information
- Disability information
- Program enrollment, needs and services
- Homeless history
- Domestic violence status
- Housing assessment (e.g. VI-SPDAT)
- And Coordinated Entry notes
HMIS@NCCEH Release of Information

Consent to share outside of HMIS and outside of your Agency

Section 3 – Coordinating Group

• Agencies included in Coordinating Groups can be found at ncceh.org/hmis/clientconsent.

• Agencies can update the members of their Coordinating Group under the Privacy materials on ncceh.org/hmis/admin.
Your Rights:

- Your refusal to share information in this system will not be used to deny you services such as emergency assistance, outreach, shelter, or housing assistance.
- Any information you provide related to race, color, religion, sex, national origin, disability, familial status, and actual or perceived sexual orientation, gender identity, or marital status will not be used in any way that would discriminate against you or prevent you from receiving services or housing assistance. You have the right to file a complaint if you feel that you have been discriminated against.
- You may request a copy of this agency’s Privacy Notice that explains HMIS and your rights and responsibilities associated with how information is kept and shared through this system.
- You have the right to see your information, request to change it, and to have a copy of that information from the servicing agency by written request. An agency can refuse to change information in your record, but must provide you with a written explanation of the refusal within 60 days of the request. Agencies are allowed to charge for reproducing a record.
- You may withdraw your consent to share at any time by writing to the staff identified in our Agency Privacy Notice. However, any information already shared with another agency cannot be taken back. Your request to discontinue sharing will have to be coordinated between sharing partners. You should tell each agency that you work with when you withdraw your consent.
HMIS@NCCEH Release of Information

Individual Client Rights

• Right to Refuse
• Right to Not Be Discriminated Against
• Right to Our Policies
• Right to Your Information
• Right to Withdraw Consent
• Right to Confidentiality
Client Consent

This Release is active for one year effective on the date of signature.

Instructions: Check next to the statement that you understand and agree to:

I agree to have all of my information listed above to be visible to all helping agencies within the groups referenced above.

SECTION 1 – HMIS Standard Information

☐ Yes, I agree to share my standard information in HMIS.
☐ No, I do not agree to share my standard information in HMIS.

SECTION 2 – HMIS Data Visibility

☐ Yes, I agree to share my HMIS information.
☐ No, I do not agree to share my HMIS information (Only our agency will see all your detailed information).

SECTION 3 – Coordinating Group

☐ Yes, I agree to share my information for coordination of care.
☐ No, I do not agree to share my information for coordination of care.

Client signature: ___________________________ Date: ___________________________
HMIS@NCCEH Release of Information

Client Consent (for 1 year)
Clients must initial next to each Section:

SECTION 1 – HMIS Standard Information
- Yes, I agree to share my standard information in HMIS.
- No, I do not agree to share my standard information in HMIS.

SECTION 2 – HMIS Data Visibility
- Yes, I agree to share my HMIS information.
- No, I do not agree to share my HMIS information (Only our agency will see all your detailed information).

SECTION 3 – Coordinating Group
- Yes, I agree to share my information for coordination of care.
- No, I do not agree to share my information for coordination of care.

Client signature: ___________________________ Date: ____________
HMIS@NCCEH Release of Information

Client Consent
To complete, client signs, dates, and lists any dependents this applies to

SECTION 3 – Coordinating Group
Yes, I agree to share my information for coordination of care.
No, I do not agree to share my information for coordination of care.

Client signature: ____________________________ Date: ____________

Signature of guardian or authorized-representative (when required): ____________________________

Relationship to client: ____________________________ Date signed by guardian/authorized representative: ____________

This release of information also applies to the following dependents:

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Date of Birth</th>
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HMIS Privacy Sign, Privacy Notice, and Release of Information

Questions, Concerns, Feedback?
HMIS@NCCEH Policies and Procedures

More detail is included in HMIS@NCCEH Policies and Procedures
  • Found at ncceh.org/hmis/admin
HMIS@NCCEH Policies and Procedures

What to do if

A client is a victim of abuse, neglect or domestic violence, or if a client reports that he/she is a victim of abuse, neglect or domestic violence, a more detailed discussion about HMIS with the client is recommended.
If HMIS poses a safety risk

A client is a victim of abuse, neglect or domestic violence, or if a client reports that he/she is a victim of abuse, neglect or domestic violence, a more detailed discussion about HMIS with the client is recommended.

Options to secure the record:

- Lock visibility to the Standard Information
- The right to refuse sharing if the agency has HMIS data visibility with other agencies
- The right to be entered as an unnamed record, masking identifying information as a randomly generated number.
- The right to have client profile inactivated in HMIS. Security of hard copy files: Agencies may create a paper record by printing the assessment screens located within HMIS.
## HMIS@NCCEH Policies and Procedures

<table>
<thead>
<tr>
<th>What if?</th>
<th>Do this!</th>
</tr>
</thead>
</table>
| A client exercises their right to secure their record (for DV or other clients) | Contact the Data Center  
If the client will not share with any outside agencies, add an eROI set to "No" and attach a scanned copy of the ROI document (if possible) |
| Someone asks for information that you can't share                      | Reply, I know you mean the best, but I cannot share that information     |
| You find or believe there could be a risk to client privacy and security | Contact the Data Center                                                  |
## HMIS@NCCEH Policies and Procedures

<table>
<thead>
<tr>
<th>Term</th>
<th>Brief Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency Participation Agreement (APA)</td>
<td>The agreement between NCCEH and HMIS participating agencies that specifies the responsibilities of participating agencies and allows agencies to have HMIS licenses.</td>
</tr>
<tr>
<td>HMIS User Agreement &amp; Code of Ethics</td>
<td>The document each HMIS user signs that defines the HMIS standards of conduct.</td>
</tr>
<tr>
<td>Privacy Script</td>
<td>The conversation guide provided to help staff explain privacy rights to clients in order to standardize the privacy presentation.</td>
</tr>
</tbody>
</table>
Access to Data
HMIS Access and User Authorization

License Basics

Unique username and password
- Don’t share
- Personal accountability

Automatic security functions
- ServicePoint requires a password change every 45 days
- ServicePoint will log out after a period of time passes without active use
- ServicePoint will lock your account after 3 failed login attempts
- SSL Encryption
License Basics

Good Password management

• Required to include:
  ❑ At least one number
  ❑ At least one symbol
  ❑ At least one lower-case letter
  ❑ At least one upper-case letter
  ❑ A minimum of 8 characters total

• Recommended to **not** include:
  ❑ Common or personally meaningful words, phrases, or dates
  ❑ Sequences (1234, abcd)
  ❑ Repeated passwords
Physical Access

The **physical security of your computer** is just as important as its technical security.

- Locked office or cubicle within a locked area.
- Computer monitors away from view of others and/or a privacy screen used, if necessary.
- Computers are locked, requiring a password after it has gone into ‘screensaver mode’.
- If you need to leave your computer- lock it so no one can use it. When finished using your computer, turn it off!
Physical Access

Protect against unintended physical access

Emails can be forwarded or printed against privacy practices

- Never email sensitive information such as Social Security Numbers
- You may want to include a Confidentiality Notice on all emails

Example from local Permanent Supportive Housing partner:

"CONFIDENTIALITY NOTICE: This message and any attachments included are from Community Link and are for sole use by the intended recipient(s). The information contained herein may include confidential or privileged information. Unauthorized review, forwarding, printing, copying, distributing, or using such information is strictly prohibited and may be unlawful. If you received this communication in error please notify us immediately by e-mail and delete the original message."
Physical Access

Best Practice: Private space for assessments

The assessment space and experience should be designed to allow people to safely reveal sensitive information or safety issues.

• allow for both visual and auditory privacy
• allow assessors to gather information from each adult in the household in separate interviews, if appropriate.

Sensitive information might include the disclosure of mental illness, physical disabilities, gender identity, or abuse.
Physical Access

Examples of Access Violations

- Staff having clients sign “blank releases” in order to fill in at a later date when they are needed.
- The use of “general releases” (prohibited by State and Federal Law).
- Staff discussion within professional settings – “informal case discussions” – that occur onsite where others, without a “need-to-know”, may overhear.
- Staff discussion outside of professional settings – case discussions in public places.
- Staff identifying individuals as consumers at social events, self-help groups, or in public.
- Client files left in an open area for others to see.
Additional Privacy Resources
Additional Resources

NCCEH Privacy Page
https://www.ncceh.org/hmis/privacy/

Keep NC Safe Guide
https://www.ncceh.org/files/8468

HMIS Requirements Proposed Rule

OnGuardOnline.Gov
https://www.consumer.ftc.gov/topics/online-security
To-Do Checklist: Agency

☐ Post HMIS Privacy Signs
Post copies of the [HMIS Privacy Sign](#) in location where clients can clearly see them, especially in places where assessments and other data gathering are done.

☐ Implement New Privacy Notice
Distribute and discuss the HMIS Privacy Notice. This notice should be available to clients upon request. You can use the template provided by NCCEH or customize it to include additional information.

If you choose to use the template, be sure to fill in your agency information in the blanks of this [fillable pdf available for download here](#). If you customize it, be sure to view the Privacy Policy requirements in Section IIIA of the HMIS@NCCEH Operating Policies and Procedures.

☐ Implement New Release of Information
Prepare staff with copies of the new Release of Information. Be sure to fill in the blank for your agency name before printing after [downloading here](#).

Ensure staff and volunteers can explain it to a client. Use this [sample script](#) to assist.
To-Do Checklist: HMIS User

❑ Complete HMIS@NCCEH Privacy Training
  Watch the webinar and complete a quiz. This training is essential for understanding important changes to our privacy policies. We’ve streamlined documents and made updates to allow for coordination of services on the client’s behalf outside of HMIS.

❑ Complete HMIS@NCCEH Orientation Training
  Watch the webinar and complete a quiz. This training will provide an overview of what to expect from HMIS@NCCEH and highlights key changes.

❑ Roll Out Privacy + Assessment Changes
  Ensure all staff have the new privacy and assessment documents and are ready to use them. Go ahead and recycle the NC HMIS forms to avoid confusion.

❑ Sign User Agreement + Ethical Standards
  View a sample of the agreement here. You may want to watch the Launch Orientation and Privacy Training Webinars before signing the agreement as they provide additional explanation of the agreement terms. Watch your email to sign the agreement via DocuSign.
NCCEH.org

Walk-through of resources and assessments
Questions, Concerns, Feedback?

Document titles may have more than one project type listed
Matches the name and order in HMIS
Short training videos available on 3-4 data elements at a time
All forms are for individuals
<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>June 12th</td>
<td>HMIS@NCCEH Launch!!!</td>
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<tr>
<td>June 27th</td>
<td>Durham CoC HMIS Users Meeting</td>
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<tr>
<td>June 30th</td>
<td>Training &amp; Agreements Deadline</td>
</tr>
<tr>
<td>July 25th</td>
<td>Durham CoC HMIS Users Meeting</td>
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<tr>
<td>August 22nd</td>
<td>Durham CoC HMIS Users Meeting</td>
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Contact NCCEH
hello@ncceh.org
919.755.4393

Contact NCCEH Data Center Help Desk
hmis@ncceh.org
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