

<b>Homeless Management Information System (HMIS)</b>	<b>3.1</b>
Policy and Procedures	
	<i>Revision Date 07/07/2006</i>

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**1 TITLE: SERVICEPOINT / IDAHO HMIS SYSTEM**

1.1 For more information regarding Homeless Management Information Systems (HMIS) Policy and Procedures, please contact the HMIS System Administrator.

**2 PURPOSE:**

2.1 This document is to define the general requirements and provide an overview of the HMIS System.

2.2 IHFA has instituted the use of ServicePoint as the HMIS system in response to the Homeless Management Information Systems (HMIS); Data and Technical Standards Final Notice. (Federal Register Vol. 69 No. 146), which is hereby incorporated by reference.

**3 SCOPE:**

3.1 These Policies and Procedures apply to ALL Persons or Organizations, using any portion of the HMIS system.

**4 DEFINITIONS:**

4.1 Affiliated Service Provider: Any Agency having an agreement to access HMIS.

4.2 Agency: Any organization providing services to eligible homeless or near homeless persons, also know as Covered Homeless Organization (CHO), and has access to HMIS.

4.3 Case Management: Services or activities for the arrangement, coordination, monitoring, and delivery of services to meet the needs of homeless individuals and families.

4.4 Client: A person who is eligible to receive services.

4.5 Chronic Homeless: A "chronically homeless" person is defined as: an unaccompanied homeless individual with a disabling condition who has either been continuously homeless for a year or more OR has had at least four (4) episodes of homelessness in the past three (3) years.

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- 4.6 Client Consent: Agreement by Client, that information is being collected, stored, and aggregated for reporting purposes within the HMIS. Written permission to share information that is stored in the HMIS with another Agency.
- 4.7 Covered Homeless Organization (CHO): Any organization (including its employees, volunteers, affiliates, contractors, and associates) that records, uses or processes PPI on homeless clients for an HMIS.
- 4.8 Documentation of Homelessness: “SHP” and “ESG” grant recipients are required to maintain adequate documentation of homelessness status to determine the eligibility of persons served by HUD’s homeless assistance programs. The documentation is typically obtained from the participant or a third party at the time of referral, entry, intake or orientation to the “SHP” or “ESG”-funded project. A copy of the documentation should be maintained in the Client file. Refer to “SHP” Policies and Procedures or “ESG” Policy and Procedures for more information.
- 4.9 Emergency Shelter: Any facility, the primary purpose of which is to provide temporary or short-term transitional shelter for the homeless in general or for specific populations of the homeless.
- 4.10 Encryption: Conversion of plain text into encrypted data by scrambling it using a code that masks the meaning of the data to any unauthorized viewer.
- 4.11 ESG: Emergency Shelter Grant
- 4.12 HIPAA - Health Insurance Portability and Accountability Act
- 4.13 HMIS: Homeless Management Information System. A computerized data collection tool specifically designed to capture Client level system-wide information over time on the characteristics and service needs of men, women, and children experiencing homelessness.

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- 4.14 Homeless: As the term is defined in 42 U.S.C. 11302, hereby included by reference. In general, the term “homeless” or “homeless individual or homeless person” includes an individual who lacks a fixed, regular, and adequate nighttime residence; an individual who has a primary nighttime residence that is a supervised publicly or privately operated shelter designed to provide temporary living accommodations, or a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings and whom do not have the resources or support needed to obtain housing. Criteria are discussed further under Client Eligibility, in the ESG Policy & Procedures and/or the SHP Policy & Procedures. Exclusion, the term “homeless” or “homeless individual” does not include any individual imprisoned or otherwise detained pursuant to an Act of the Congress or a State law.
- 4.15 HUD: US Department Housing and Urban Development.
- 4.16 IHFA: Idaho Housing and Finance Association. The owner and operator of the IHFA Homeless Management Information System (HMIS) and serves as the System Administrator and custodian of data in the HMIS.
- 4.17 Intake (for the following purposes):
- 4.17.1 Funded project – The admission into the “SHP”, “S+C”, “ESG”, or other funded program/project.
  - 4.17.2 HMIS – The process of inputting data/information into the HMIS.
  - 4.17.3 Shelter/Service – The act or process of checking Client into the shelter/service.
- 4.18 Key User: Designated User identified and authorized to be the first level of Service Provider administration in the HMIS system.
- 4.19 Mainstream Resource - A term used to describe a variety of federal, state and county government assistance programs.
- 4.20 NewsFlash: Provides important news items, updates and alerts, found on the Home page or via the Toolbox in ServicePoint.
- 4.20.1 Agency NewsFlash: Only Users in an Agency will see these news items, updates and alerts in ServicePoint.
  - 4.20.2 System Wide NewsFlash: All Users will see these news items, updates and alerts in ServicePoint.

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- 4.21 Non-Affiliated Third Party: Any entity or individual not having an agreement to access the ServicePoint system.
- 4.22 Outlier: Data representing less than 5% of any value.
- 4.23 Protected Personal Information (PPI): Any information that can be used to identify a particular individual. Protected Personal Information includes without limitation a Client’s name, Social Security Number, Date of Birth, and such personal identifying information that identifies directly, indirectly, by linking with other identifying information to identify a specific individual, or can be manipulated by a reasonably foreseeable method to identify an individual.
- 4.24 Real Time: Real Time is defined as immediate data entry upon seeing a Client.
- 4.25 ROI: Release of Information. The purpose of the ROI is to notify the client that his information will be entered into the HMIS and to obtain his consent to share said information with other affiliated service providers.
- 4.26 Service Provider: Organization having an agreement to access HMIS and place data in the ServicePoint database as administered by IHFA.
- 4.27 ServicePoint (HMIS) System: The IHFA HMIS system of choice. ServicePoint is a Client Information System that provides a standardized assessment of consumer needs, creates individualized service plans and records the use of housing and services which communities can use to determine the utilization of services of participating Agencies, identify gaps in the local service continuum and develop outcome measurements. (For a Brief Overview, See: [Guide # 1](#), What Is ServicePoint?)
- 4.28 SHP: Supportive Housing Program
- 4.29 Supportive Services: Includes but not limited to services concerned with employment, health, drug abuse, and education and may include: Assistance in and referrals for obtaining permanent housing, Medical and psychological counseling and supervision, Employment counseling, Nutritional counseling, Substance abuse treatment and counseling, Assistance in obtaining other Federal, State, and local assistance including mental health benefits; employment counseling; medical assistance; Veteran's benefits; and income support assistance such as Supplemental Security Income benefits, Aid to Families with Dependent Children, General Assistance, and Food Stamps; Other services such as child care, transportation, job placement and job training.

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4.30 System Module: Component of ServicePoint System.

4.30.1 ClientPoint: System module that maintains all information related to your Clients, includes profile, assessments, case plans and service transactions.

4.30.2 ResourcePoint: System module that maintains a comprehensive database of Agencies and programs.

4.30.3 ShelterPoint: System module that maintains bed status and reservation system for shelters.

4.31 Transitional Housing: One type of supportive housing used to facilitate the movement of homeless individuals and families to permanent housing, basically, it is housing in which homeless persons live for up to 24 months and receive supportive services that enable them to live more independently. The supportive services may be provided by the organization managing the housing or coordinated by them and provided by other public or private Agencies.

4.32 User: Anyone accessing the HMIS system with a unique User ID and Password.

**5 EQUIPMENT, MATERIALS AND SUPPLIES:** (participating Agencies are responsible for providing their own technical support for all Hardware and Software systems used to connect to HMIS)

5.1 Computer Workstation (PC, Personal Computer).

5.1.1 Minimum system requirements are applicable. Contact the System Administer to receive current requirements.

5.2 Internet connectivity or access to LAN/WAN. Preferred access: high-speed connections, cable, broadband, etc.

5.2.1 Minimum system requirements are applicable. Contact the System Administer to receive current requirements.

5.3 Printer (optional)

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**6 FORMS AND RECORDS: (Available in FORMS section of the ServicePoint User Handbook.)**

- 6.1 USER AGREEMENT: Shall be signed by all HMIS Users.
- 6.2 HMIS CLIENT CONSENT & RELEASE OF INFORMATION AUTHORIZATION FORM: Shall be used for all Clients.
- 6.3 CLIENT INTAKE FORM: May be used for all Clients.
- 6.4 DATA REQUEST FORM: Shall be completed for special report requests, non-identifying aggregate and statistical data only.
- 6.5 HMIS IDAHO HIGHLIGHTS: a privacy notice describing its policies and practices
- 6.6 DATA ENTRY FORM TEMPLATE: a data entry tool.

**7 CONFIDENTIALITY:**

- 7.1 If it is requested of the HMIS system administrator he must be willing to sign the confidentiality oaths of the Affiliated Service Providers.
- 7.2 For all information entered in the HMIS system the Service Providers, Users and Agencies are bound by all applicable federal and state confidentiality regulations and laws that protect the Client records that will be placed on the HMIS system.
- 7.3 Any requests for release of information, including court orders and subpoenas, shall be referred to IHFA. The Service Provider/User agrees not to release any confidential information received from the HMIS database to any organization or individual.
- 7.4 The Service Provider shall ensure that all staff, volunteers and other persons are issued a unique User ID and password for HMIS and receive confidentiality training on the use of HMIS and applicable confidentiality laws.
  - 7.4.1 The Service Provider is responsible to contact the Agency or System Administrator for revoking, adding or editing User access.
- 7.5 Unauthorized disclosure of Protected Personal Information may be grounds for legal action.

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- 7.6 The Service Provider/User shall utilize the HMIS Client Consent & Release of Information Authorization form for all Clients. The Service Provider/User shall provide a verbal explanation of the HMIS database and the terms of consent to the Client, including an explanation of how the information will be used, how it will be provided, and advantages of providing accurate information.
- 7.7 The Service Provider/User shall diligently record and take appropriate actions, in the HMIS system, to record all restrictions requested by the Client.
- 7.8 If a Client withdraws consent for release of information, the Service Provider/User remains responsible to ensure that Client’s information is restricted.
- 7.9 The Service Provider/User shall maintain appropriate documentation of Client consent to participate in the HMIS database.
- 7.10 Sharing of HMIS data among Affiliated Service Providers is encouraged but not required. The HMIS data items excluded from sharing include medical, legal, case management, Client case notes and file attachments, unless specifically released by Client.
- 7.11 HIPAA Privacy Rules take precedence over HMIS privacy standards. If an agency is a HIPAA covered agency, they must abide by HIPAA regulations.
- 7.12 Domestic Violence clients may be added to the HMIS anonymously. When entering a client anonymously, it is incumbent upon the service provider to keep a record of the client’s anonymous ID.
  - 7.12.1 The client’s gender and date of birth must be entered. This insures that aggregate reports detail correct information.
    - 7.12.1.1 The birth date may be substituted with 01/01/yyyy where the “yyyy” is the actual birth year.
  - 7.12.2 Creating anonymous records may mean that reports will not provide a true unduplicated count and therefore this option should only be used if absolutely necessary.

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## **8 HMIS USE AND RESPONSIBILITIES:**

### 8.1 Covered Homeless Organization (CHO) Responsibilities:

- 8.1.1 The CHO who receives HUD funding (SHP, ESG, S+C, etc) participating in HMIS must be current all related contracts.
- 8.1.2 The CHO shall abide by all policies and procedures.
- 8.1.3 The CHO shall keep abreast of all ServicePoint updates and policy changes.
- 8.1.4 The CHO shall identify and approve their respective Agency Users.
- 8.1.5 The CHO shall designate one User to be the Agency's Key User.
- 8.1.6 The CHO shall be responsible for entering Client data (profile, household, needs, services, referrals, any other Client data you may require), following up on referrals, and running reports.
- 8.1.7 The CHO shall have representation at all agency/regional data quality review meetings.

### 8.2 User Responsibilities:

- 8.2.1 The User shall follow, comply with and enforce the User Agreement. (The User Agreement may be modified, by IHFA at its discretion, as needed for the purpose of efficient operation of the HMIS system. At the time modifications are made an announcement will be emailed and made via NewsFlash in ServicePoint. The User shall provide an email contact to the System Administrator for communication purposes.)
- 8.2.2 The User shall comply with all policies and procedures.
- 8.2.3 Each User is provided with an access level as required by his/her role. This access level controls who can see which information, lower levels of access allow ONLY viewing of basic demographics, while the middle levels of access allow additional information to be viewed. The highest levels of access are limited to administrators. Confidentiality is a primary concern and these levels of access help control access to information.

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- 8.2.4 Every User of the HMIS system is authenticated with a unique User ID and password. This provides a level of security and accountability for the CHO's database. **Sharing of User IDs or passwords is forbidden.**
- 8.2.5 Each User will follow the Simple Rules for Passwords and Rules for User IDs and Passwords, Guide # 3.
- 8.2.6 If a User has 4 consecutive bad logon attempts, that User is locked out of the system and will need to contact the Agency or System Administrator to regain access. Please be careful when logging onto the system.
- 8.2.7 The User shall use Client information in the HMIS database, as provided to the Service Provider or Partner Agencies, to assist the Service Provider in providing adequate and appropriate services to the Client.
- 8.2.8 The User shall only enter individuals in the HMIS database that exist as Clients under the Service Provider's approved area of service. The User shall not misrepresent its Client base in the HMIS database by entering known, inaccurate information. The User shall not knowingly enter false or misleading data under any circumstances.
- 8.2.9 The User shall consistently enter information into the HMIS database and will strive for Real Time data entry, and be obligated to weekly data entry.
- 8.2.10 The User will not alter information, with known inaccurate information, in the HMIS database that has been entered by another Service Provider (i.e. Service Provider will not purposefully enter inaccurate information to over-ride information entered by another Service Provider).
- 8.2.11 The User shall not include profanity or offensive language in the HMIS database.
- 8.2.12 The User shall utilize the HMIS database for business purposes only.
- 8.2.13 The User shall not use the HMIS database with intent to defraud federal, state or local governments, individuals or entities, or to conduct any illegal activity.
- 8.2.14 The User shall not cause in any manner, or way, corruption of the HMIS database in any manner.

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8.2.15 In the event that data entry cannot be made Real Time and the User utilizes hard copy paper forms, once the data has been entered into HMIS, the forms shall be **securely** stored or suitably disposed of.

8.2.16 In order to facilitate information gathering, IHFA is providing a Client Intake form. This represents the Universal Data Elements as defined in Homeless Management Information Systems (HMIS); Data and Technical Standards Final Notice, it is up to the Service Providers and Staff to actualize and utilize the HMIS system.

8.2.17 The User shall enter data into HMIS

8.2.17.1 HUD Funded CHO Users, at a minimum, shall enter the data elements required by the Data Standards for all Clients.

8.2.17.2 Non-HUD funded CHO Users, at a minimum, shall enter essential data elements for all Clients.

8.2.18 The User shall enter ROI information on all clients.

8.2.18.1 Sharing data is optional but entering data is not optional. An ROI shall be completed by all clients, even if not sharing data.

8.2.19 The User is responsible for data entry accuracy and correctness.

8.2.20 The User shall log off the HMIS and shut down the browser when not using HMIS.

8.2.21 The User shall utilize the password protected screen savers that automatically turn on to mitigate the burden of shutting down the workstation when momentarily stepping away from the work area.

8.2.22 **Report any discrepancies in the use of the IHFA HMIS system, including without limitation access of information and entry of information, to the Service Provider Key User or to the System Administrator.**

8.2.23 The User shall periodically, when instructed by the Agency or System Administrator, run and review audit reports to ensure data accuracy and completeness.

8.3 Key User Responsibilities:

8.3.1 The Key User shall observe all User Responsibilities.

8.3.2 The Key User shall not create custom fields without the approval of the System Administrator.

8.3.3 The Key User shall use Agency NewsFlash only for distribution of key HMIS information.

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- 8.3.4 The Key User shall act as the first level of Service Provider administration and support in the HMIS system.
- 8.3.5 The Key User shall be responsible for the initial training of new Users in his/her Agency.
- 8.3.6 The Key User shall regularly run and review audit reports to ensure policies are being followed by staff.
- 8.3.7 The Key User will be responsible for monitoring all User access within their own Agency.
- 8.4 IHFA System Administrator Responsibilities:
  - 8.4.1 The System Administrator shall provide initial training and periodic updates to that training to select Service Provider Staff on the use of the HMIS software.
    - 8.4.1.1 New Provider training
    - 8.4.1.2 Upgrade, enhancement, refresher or other training
    - 8.4.1.3 Data quality reviews
  - 8.4.2 The System Administrator shall provide important news items, updates and alerts via email and NewsFlash in ServicePoint
  - 8.4.3 The System Administrator shall be available for technical assistance (i.e. troubleshooting and report generation).
  - 8.4.4 The System Administrator shall aid in the determination of HMIS User access level. The level will be based on each User's job function as it relates to ServicePoint's data entry and retrieval schema. User Access Levels, Guide # 4.

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**9      REPORTS:**

- 9.1      The Service Provider/User's access to data about Clients it does not serve shall be limited based on the current status of any release of information on file.
- 9.2      The general public can request non-identifying aggregate and statistical data, by completing a Data Request form.
- 9.3      Non identifying aggregate and statistical data will not contain outliers. Outliers may be removed if they represent less than 5% of any value.
- 9.4      The HMIS System Administrator will address all requests for data from entities other than Affiliated Service Providers or clients.
- 9.5      The System Administrator will run system-wide reports to assess the data, quality and level of participation by Affiliated Service Providers. Results of these reports may be shared with Affiliated Service Providers.

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## **10 PRIVACY REQUIREMENTS:**

- 10.1 The CHO must post a sign at each intake desk (or comparable location) that explains generally the reasons for collecting this information.
- 10.2 The CHO must publish a privacy notice describing its policies and practices for the processing of PPI and must provide a copy of its privacy notice to any individual upon request.
- 10.3 The CHO must specify in its privacy notice the purposes for which it collects PPI and must describe all uses and disclosures.
- 10.4 If the CHO maintains a public web page, the CHO must post the current version of its privacy notice on the web page.
- 10.5 The CHO must post a sign stating the availability of its privacy notice to any individual who requests a copy.
- 10.6 The CHO must maintain permanent documentation of all privacy notice amendments.
- 10.7 The CHO must allow an individual to inspect and to have a copy of any PPI about the individual.
- 10.8 The CHO must offer to explain any information that the individual does not understand.
- 10.9 The CHO must consider any request by an individual for correction of inaccurate or incomplete PPI pertaining to the individual, The CHO is not required to remove such information but they may mark such information as inaccurate or incomplete or supplement such information.
- 10.10 The CHO must require each member of its staff (including employees, volunteers, affiliates, contractors and associates) to sign (annually or otherwise) a confidentiality agreement that acknowledges receipt of a copy of the privacy notice and that pledges to comply with the privacy notice.
- 10.11 The CHO must require each member of its staff (including employees, volunteers, affiliates, contractors and associates) to undergo (annually or otherwise) formal training in privacy requirements.

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- 10.12 The CHO must establish a method, such as an internal audit, for regularly reviewing compliance with its privacy notice.
- 10.13 The CHO must establish an internal or external appeal process for hearing an appeal of a privacy complaint or an appeal of denial of access or correction rights.
- 10.14 The CHO must protect HMIS system from malicious intrusion behind a secure firewall.
- 10.15 The CHO must secure any paper or other hard copy containing PPI that is either generated by or for HMIS, including, but not limited to report, data entry forms and signed consent forms.

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## **GUIDE # 1**

### **What Is ServicePoint?**

The IHFA HMIS system of choice

ClientPoint allows Users to enter, edit, view, or print Client information. Additionally, ClientPoint offers sophisticated features such as building and tracking family relationships, restricting Client records, and conducting case management.

ServicePoint Module allows you to add new service items, update status, send and receive referrals, and view a Client's service history (unless restricted). The result is a thorough understanding of a Client's situation and providing Clients quicker access to appropriate services.

ShelterPoint is specifically designed to provide housing providers an efficient method of managing inventory, viewing area availability, and making referrals. Real-time data provides case managers accurate data to make quick service entries and informed referrals.

#### **Benefits:**

- No software to download, begin using instantly
- Easy, web-based data entry
- Detailed report generation
- Capture data for HUD Annual Report
- Secure data entry, record confidentiality
- Real-Time data sharing with other providers
- Track changes in income, employment, living situations, and more
- Standardized service item selection for accurate reporting
- Informed referrals
- Referral tracking
- Detailed Client history viewing

#### **Security & Confidentiality:**

ServicePoint ensures that the CHO's Client and Service Provider data is secure at all times. The only people permitted to see confidential information are the people who need to see it. Information can be locked or unlocked, viewed or not, depending on the level of security of the viewer.

Additionally, IHFA has developed and implemented Client consent forms.

Since the implementation of ServicePoint™ involves a centralized database where participating Agencies can enter and access Client information, with Client consent, all data is encrypted at the database level. This means that anyone hacking into the server would not see any Client information. This encryption tool is state of the art. All changes, additions and deletions to Client records are tracked by the system and identify who and when.

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## Guide #2 - Data Elements List and Integrity Expectations

Each \* represents a field of information requested for HUD reporting. Collect and enter into the HMIS system Client data relevant to the program requirements and delivery of services. Underlined fields are essential elements, required data entry for all Clients entered in the HMIS system.

### @ CLIENTPOINT

#### CLIENT PROFILE

Enter information collected on the Client Intake Form:

First name & last name OR anonymous client  
(Use anonymous for DV or HIV/AIDS clients, or when essential to maintain Client confidentiality)

\* Family Characteristics

- Head of Household?
- Relationship to Head of Household

\* Date of Birth

Social Security Number<sup>1</sup>

\* Gender

\* Race

\* Ethnicity

\* Veteran Status

\* Homeless Status

\* Chronic Homeless Status

\* Extent of Homelessness

\* Prior Residence and Length of Stay

\* Zip of last Permanent Address

\* Citizenship/Eligible Immigration Status

\* Program Entry/Exit dates

\* Disabling Condition (Yes or No)<sup>2</sup>

### @ Service Transactions

\* Client needs

\* Services provided

Unmet needs

Referrals for services

\* Mainstream resource services

Other services

### @ SHELTERPOINT

Client check-in and check-out

### Program Specific Elements:

\* Income and Sources

\* Non-Cash Benefits

\* Disability Information

\* Destination

\* Reasons for Leaving

\* Employment

### Data Integrity Expectations:

- ❖ All names will be accurate.
- ❖ All underlined values will be completed accurately for all clients.
- ❖ Blanks or “unknown” entries in required fields will not exceed 5% per month.
- ❖ Data entry for all services provided during one month must be entered in the HMIS by the fifteenth working day of the following month.

NOTE: All Client information in ServicePoint is encrypted so that no persons without authorization are allowed to view a Client's data can see the information.

NOTE <sup>1</sup>: Collecting and using a SS# will save time when searching the database for Clients and will maximize the accuracy of unduplicated records. Anyone who refuses to provide a SS# shall not be refused services.

NOTE <sup>2</sup>: Disabling Condition is required in advance of award of benefits only when needed for program eligibility; other disability information may be collected and included in HMIS after the benefits have been awarded.

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### **Guide #3 - Rules for Passwords & User IDs**

#### **Simple Rules for Passwords**

- ❑ Keep your password secure and confidential.
- ❑ Do not share your password.
- ❑ Never use the same password twice. When selecting a new password, choose one that is reasonably different from your previous password.
- ❑ Change your password frequently. The shorter the life of a password the better. ServicePoint will require a password change every 45 days.
- ❑ ServicePoint passwords must be a minimum of 8 characters, and include 2 numeric values.
- ❑ Passwords shall not be or include the User name or User id.
- ❑ Passwords shall not consist of any word found in the common dictionary, or any of the above spelled backwards.
- ❑ Do not select a trivial, predictable or obvious password.
  - Trivial passwords include common words like ‘secret’, ‘password’, or ‘computer’
  - Predictable passwords include days of the week, months, or a new password that has only a one or two character difference from the previous password.
  - Obvious passwords include names of persons, pets, relatives, cities, addresses, birth date, car license plate and so on

#### **Rules for User IDs and Passwords**

- ❑ Do NOT use someone else’s or password. If you need more access than you presently have or if you are having problems with your access, contact your Agency or System Administrator for help.
- ❑ Beware of “shoulder surfers”. These are people who stand behind you and look over your shoulder while you are keying in your password or PIN, or while you are working with confidential information.
- ❑ Do NOT use your access level to enable other individuals to access information that they are not authorized to access, or to enter information that they do not have access to.
- ❑ NEVER post your login or password on your terminal or other obvious places.
- ❑ Always change the temporary password assigned to you by your administrator as soon as you receive it.
- ❑ LOG OFF or LOCK UP when you are finished using your terminal or workstation, or if you are stepping away from your desk, even momentarily.
- ❑ If you are going to be away from the office for an extended period (e.g. vacation or maternity leave), ask your administrator to temporarily suspend your access. Your ID will be reactivated when you notify the administrator of your return.

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### Guide #4 - User Access Levels

<b>Access Level</b>	<b>Description</b>
Resource Specialist I	Access is limited to the 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.
Volunteer	Volunteer 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, Administrators assign this User Access Level to individuals who complete client intake and then refer the client to an Agency Staff user or a Case Manager.
Agency Staff	Agency staff has access to ResourcePoint, limited access to ClientPoint, full access to service records and access to most functions in ServicePoint. However, Agency Staff can only access basic demographic data on clients (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.
Case Manager	Case Managers have 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 with the exception of audit reports.
Agency Administrator	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. They have full reporting access. They cannot access the following administrative functions: Assessment Administration, Picklist Data, Licenses, Shadow Mode, or System Preferences.
System Administrator	The System Administrator has full and complete access to the system.

