NEW HMIS POLICY MANUAL HIGHLIGHTS

BRICH approved the updated HMIS Policies and Procedures Manual on October 13, 2023. It contains all of the basic policies that address privacy, security, data sharing, and operations of HMIS. The manual was updated to reflect our move from ServicePoint to Clarity and to bring it up to date with 2024 HUD Data Standards. The main changes to our policies are highlighted below:

On-Boarding of New Agencies and Users

o **Agency Captains** – If you don't have one already, please identify who will be your agency's HMIS Captain. This staff person should be the main point of contact for HMIS issues, should submit requests for new user accounts, and should ensure that HMIS policies are being followed at your agency. Please send Brian the name of your Agency Captain ASAP.

o **New Forms – We created a set of forms for agencies/user support, including:**
   - HMIS Help Desk Ticket - Some categories of request have been removed because they now have a dedicated form of their own
   - HMIS New User Request Form - All new staff account requests should be submitted with this form instead of a Help Desk Ticket
   - HMIS New Project Set-Up Form - Use this form to request the creation of a new HMIS program or project for your agency
   - HMIS New Participating Agency Request Form - Use this form if your agency would like to join HMIS
   - HMIS Data Request Form - Use this form to request a custom report, aggregate data for a research project, information to support an article, etc.
   - All the forms are available at the HMIS Help Center page: https://www.endhomelessnessblueridge.org/hmis/hmis-help-center/

o **New Staff On-Boarding** – We have been handling on-boarding by having new staff watch the training videos on the HMIS YouTube Page, which we will continue, but we are now going to complete a live training with an HMIS System Admin before giving users access to the Live Site.

Client Privacy

o **New Client HMIS Release of Information (ROI) Forms** – To reflect the new Coordinated Entry implementation, we updated the HMIS ROI forms over the summer. Please make sure you are using the current forms which can be downloaded at https://www.endhomelessnessblueridge.org/hmis/agencies/
   o **If you are a COORDINATED ENTRY ACCESS POINT, please make sure you are having clients review and answer BOTH consent questions. If they DO NOT authorize sharing of info with partner agencies, then you cannot enter them into the CE System.**

o **Data Collection Statement** – Please download, print, and post the HMIS Data Collection Statement at any workstation where you do client intakes or data entry.

Security

- o **Security Compliance Checklist** – We are going to start an annual security compliance review for all participating agencies. Brian will schedule and complete reviews for local agencies in early 2024. The following year, the Agency Captains will be asked to complete the review and submit it by a completion date.