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HMIS Data Sharing Policy

The following policy describes details about the scope of client data sharing in ClientTrack HMIS. Certain client data is shared between all organizations participating in HMIS, regardless of whether an ROI/MOU ("Release of Information" / "Memorandum of Understanding") has been executed and set up in ClientTrack. Other client data will be shared only if there is an ROI/MOU in place and the form where the data was entered is marked with the security setting "Share with ROI/MOU."

Data sharing parameters:

- 1) Shared between and editable by all participating organizations:
 - a) Client Intake record: Name, Date of Birth, Social Security Number, Marital Status
 - b) Family and Contact Information: Family Name, Family Relationships, Family Address, Emergency Contact
 - c) Demographics: Ethnicity, Race, Religious Preference, Citizenship Status
 - d) Client Photo
- 2) Shared between all participating organizations:
 - a) Program Enrollments (Client Dashboard, read-only): Case Name, Entry Date, Exit Date, Program Name, User Name, Program Type, Organization Name, & Services
- 3) Shared between specific organizations:
 - a) Data entered with "Share with ROI/MOU" setting, and with an ROI/MOU in place.
- 4) Limited to the organization that created the record:
 - a) Data entered with "Share with ROI/MOU" setting, but without an ROI/MOU in place
 - b) Data entered with "Restrict to Organization" setting (this is the default setting for sensitive client data, such as: Case Notes, HMIS Barriers, Health assessment, Addictions assessment, Legal assessment, Domestic Violence assessment)

Setting an ROI – Users have the ability to set individual clients' Release of Information with other organization(s). The user is responsible for obtaining the client's signed permission and keeping the document in the client's file.

Setting an MOU – Only HMIS administrators can set a Memorandum of Understanding between multiple organizations. The MOU document must be signed by heads of all sharing organizations and submitted to the Coalition HMIS administrators for review and implementation.

The Coalition HMIS administrators have access to all the data in the HMIS, regardless of security settings. Coalition for the Homeless will never grant client data access to participating agencies outside of this Data Sharing Policy as described above. The Coalition will never disclose any client data to a third party, unless required by law or otherwise permitted by the HMIS Privacy Policy. (Please review the HMIS Privacy Policy available on the Coalition website for more information.)