HMIS Funder Access Policy and Form

Organizations which provide funds (Funders) to homeless service providers (Recipients) that work with clients have a strong interest in better understanding the impact of their funding. Funders are interested in client outcomes, data quality, and a variety of other pieces to make better **data-informed** decisions. To this end, Funders are often interested in more direct access to Recipient data.

This form reviews the different levels of access available to Funders in HMIS, for their Recipient programs. In addition to outlining the details of each access level, the way to gain this access is also described.

Relevant Policy Guidance

BOS and MAR CoC Privacy Notices and other policies lay out protections and instructions for the sharing of client Personal Identifying Information (PII). **The reason for disclosure of the data, including who can view client PII in the system, must fall within the privacy policy.** This includes coordinating services, academic or operations research/reporting, "for functions related to payment or reimbursement for services", and "to carry out administrative functions such as legal, audits, personnel, oversight, and management functions".

HMIS's interpretation of the policy is, if the objective can be met with aggregate data, de-identified data, or temporary access to PII then the request will be redirected to those access options in order to limit the unnecessary access or distribution of client PII.

Funder Access Levels

Available to all Funders at all times

1) External Data Requests
   - Funders may receive standard aggregate demographic reports or federal reports to meet funding requirements (i.e., the Funder needs an aggregated CoC-APR for submission into SAGE).
   - Access to publicly available data.
   - Funders may contract with HMIS for additional reporting, which is approved through existing mechanisms.
   - These requests are initiated by the Funder submitting a ticket through the ticketing portal.

Available based on Recipient approval

Agency has the right to decline access

1) One-Time Monitoring – *recommended as the standard approach unless there are unique needs*
   - The Recipient agency requests a temporary account for a Funder to gain EDA access to their agency's projects. This access lasts for a period of 15 business days.
   - The user (from the Funder) must complete a Code of Ethics but does not need to complete required training. The Funder does not need to be an onboarded agency.
   - This request is submitted through the ticketing portal. The Recipient agency should refer to the New User Request Form for additional details.
   - Solari will loan the license to the Funder for these purposes.

2) Funder-Level Access
   - The Recipient agency requests a user from the Funder to have ongoing access to agency's contracted projects.
   - The Funder will have Read Only access. The types of Read Only access are described below.
   - The Funder must be an onboarded agency in HMIS and use their **own paid** licenses for this purpose.

- This request is submitted through the ticketing portal. The Recipient agency should attach the form on the last page of this document to the ticket or provide some other form of verification.

User Role Options

One-Time Monitoring

The following section describes what user roles are available for one-time monitoring. This access is ideal for viewing client notes, file attachments, and other data related to an in depth audit.

1) "Volunteer" has the following access:
   - View ONLY
     - Incidents
   - View AND Modify
     - Client record (Name, DOB, Veteran Status, SSN), File Attachments, Services, Referrals
   - Shelters Module Access
   - EDA Mode

2) "Read Only II" has the following access:
   - View ONLY
     - Client record (Name, DOB, Veteran Status, SSN), ROIs, Case Managers, Assessments (within Assessments tab **only)**, Case Plans, Incidents, Services, Referrals, Entry/Exits, File Attachments
   - View assessment data on Assessments tab **only**
     - Can see UDE/PDE data
     - Can see any other data entered by the Recipient agency
   - Report Access

Funder Level Access

The following section describes what user roles are available for funder level access. This access is ideal for keeping a high level check on project outcomes via reporting, over time.

1) "Read Only II" has the following access:
   - View ONLY
     - Client record (Name, DOB, Veteran Status, SSN), ROIs, Case Managers, Assessments (within Assessments tab **only)**, Case Plans, Incidents, Services, Referrals, Entry/Exits, File Attachments
   - View assessment data on Assessments tab **only**
     - Can see UDE/PDE data
     - Can see any other data shared directly to Funder or shared to entire system
       - Custom Recipient assessments will not be viewable, unless explicitly shared to Funder
   - Report Access

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Recipient Considerations

- The Recipient agency may rescind Funder access at any time, excepting contractual obligations.
- It is the Recipient's responsibility to monitor which Funders have access to their programs in HMIS.

Funder Considerations

- The user from the Funder must have completed required HMIS training.
- If a user from the Funder already has a non-Read Only account in HMIS, this will result in one user having two accounts (and using two licenses) in HMIS.

Funder User Information

Agency (Funder)		☐ BOS ☐ MAR
User Legal Name		
User Job Title		
Email Address		
Phone Number		

HMIS Access Information

Funder Access	☐ **One-Time Monitoring Access** ☐ **Funder Level Access** ***(Only one option may be selected)***
Access Start Date	
Access End Date (One-Time Monitoring Only)	
Reason for Access	
List the project ID number (ex. 14514) or exact name as it appears in HMIS (ex. HMIS High Risk) for all projects that the user will have EDA access to.	

Recipient Agency HMIS Primary Point of Contact **Name**

Recipient Agency HMIS Primary Point of Contact **Signature** Date