

Using ART to monitor client record locking in HMIS

A report is available in ART to review Release of Information records (ROIs) that have been created since the new Client Consent for Data Sharing went into effect on 5/1/2017.

With this new report, ATAs can check how many ROIs have been completed for each client and there will be a **red alert** for those records that should be locked.

Location of the new report (Public Folder →Chicago CoC Reports (Secure) →Data Quality→Consent_ROI_Check):

The screenshot shows the ART Browser interface with a tree view of folders and reports. The path is: Public Folder > Chicago CoC Reports (Secure) > Data Quality > Consent_ROI_Check_2017-07-31. A red arrow points to the report name.

ART Browser	
▶	Inbox
▶	Favorites
▶	Available Reports and Templates
▶	Bowman Systems Resources
▼	Public Folder
▶	archived
▶	ART Gallery Reports and Resources
▶	ART Standard Reports
▶	Bowman Use Only
▶	Chicago Alliance (Only)
▼	Chicago CoC Reports (Secure)
▶	25 Cities
▶	APR
▶	CES
▼	Data Quality
▶	archived
🔍	0263 - RHY Data Completeness-Quality Report - v2
🔍	AHAR - Exit Clients 20161019
🔍	Annual Assessments 2016-04-25
🔍	Annual Assessments 2017-04-24
🔍	Check Most Recent Service - Drop-In Centers
🔍	Check Most Recent Service - Emergency Shelters
🔍	ChicagoDQ_----_yyyy-mm-dd
🔍	Consent_ROI_Check_2017-07-31
🔍	CountServicesByDay_2014-03-10

Important Note: ART cannot report on whether the locking has been completed. ATAs should run this report to ensure users are complying with mandated expectations that ROIs are being created and records are being locked, as required.

Report Prompts

This report pulls in all ROI records created since the new Client Consent for Data Sharing was implemented on 5/1/17.

The ROI Date Started **does not** need to be adjusted.

The **Provider** prompt **must** be completed before running the Query. This report can be run on multiple Providers at one time.

Prompts

Reply to prompts before running the query.

- ✓ EDA Provider -Default Provider-
- ✓ Enter ROI Date Started: 5/1/2017 12:00:00 AM
- ➔ Select Provider:

Important Note: this report must be run on the Provider selected when users create the ROI. This will vary across programs. Some users change the provider to reflect the exact program, whereas others leave it as the default agency-level provider. You **can** run this report on multiple providers at one time.

Release of Information

Release of Information - (390509) test, bowman

Household Members

To include Household members for this Release of Information, click the box beside each name. Only members from the SAME Household may be selected.

- (178462) Single Male
 - (390509) test, bowman
- (183438) Male w/ child
 - (390509) test, bowman

Release of Information Data

Provider* All Chicago (1)

Release Granted* Yes

Start Date* 06 / 01 / 2017

End Date* 06 / 15 / 2020

Documentation A - Share 1 with Collaborative and 1 and 2 with agencies overseeing housing and service matching

Witness Sal Munoz

Save Release of Information Cancel

Report Results

The report provides client names and ID numbers, in addition to the witness from the agency, as documented in the ROI record.

The **Documentation field** in the ROI is what triggers the **red alert**, as seen in the screenshot below. Clients that select options B or D on the Client Consent for Data Sharing require that their records are locked in HMIS.

The **red alert** draws attention to these records and ATAs should use this to ensure the file was locked.

Client ID	Client Name	Start Date	End Date	ROI Provider	Documentation	Witness	
		7/17/17	7/17/20		A - Share 1 with Collaborative and 1 and 2 with agencies overseeing housing and service matching		
		7/17/17	7/17/20		Supplemental - Agrees to share disability information		
		6/10/17	6/10/20		D - Does not agree to share any information (Data not shared with any agencies)		

Additional Resources

On the Helpdesk, users can find resources on how to document client consent in HMIS and locking client records.

<http://hmis.thechicagoalliance.org/hc/en-us/sections/115000684983-Consent-Form-Privacy-Policy>

In addition, an HMIS Training Snippet video has been created to assist users with documenting consent and adding ROIs.

https://www.youtube.com/playlist?list=PLSwsELGIEwxCcl7gmEgE_ftQwrejdcll2

Email HMIS@allchicago.org as questions arise.