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):

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.

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.

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=PLSwsELGIExwCcL7gmEgE_fTqwrejdclI2

Email HMIS@allchicago.org as questions arise.