

# Durham Community Sharing

As with all sharing, the NCCEH Data Center highly recommends having a community plan and agreement around how to deal with data conflicts as well as norms and expectations about how to use the shared elements in HMIS. Below are the data pieces the HMIS-participating agencies in the Durham CoC have decided to share across the whole community, possible risks to sharing this HMIS data, and our CoC's plan for addressing conflicting information in the HMIS data. This list is by no means exhaustive and will be added to when additional Data Resolution Plans are needed.

## Client Demographics:

- **Risks:** Data conflicts with client information
- **Data Resolution Plan:**
  - When there can be only one correct answer, e.g. with a date of birth, and a user becomes aware of conflicting answers, users should only change HMIS data on their own when written documentation is provided. E.g. if the HMIS has a date of birth that conflicts with a client's written documentation, perhaps the client presents a copy of a birth certificate, the user may update the HMIS data on his/her own.
  - Without written documentation from the client, if the client offers information orally that is different from what already is entered into the HMIS, the HMIS user should:
    1. **Record**, i.e. write down, the information outside of the HMIS.
    2. **Contact** the agency/user that entered the original data to seek to reconcile the data. (To learn who entered the original data and/or make corrections in the HMIS, please follow the instructions in the training guide available at [ncceh.org](http://ncceh.org). In email communications, **please use a client's HMIS number only!**)
    3. If possible, **reach agreement** on which data is likely to be more accurate and which user will update the HMIS information.
    4. If unable to connect with the agency/user that entered the original data with a minimum of three attempts over a two-week period, **enter** the conflicting data in a "Note" on the "client profile" page and **send** an email message to the other agency's HMIS Agency Administrator confirming the data conflict and the new "Note" on the "Client Profile."

## Profile Assessment (contact information etc.):

- **Risks:** Data conflicts with client information when multiple answers may be correct or acceptable.

- **Data Resolution Plan:** When multiple answers may be correct or information may have changed, e.g. contact numbers, **agencies may edit data existing in the HMIS only at the direction of the client by:**
  1. **Entering** the new information on a new row and, if possible,
  2. **Placing** an end date on the old and new information.
  3. **The user correcting the HMIS data SHOULD add a Client Note on the Client Profile indicating what has been corrected.**
  4. As time permits, the user may **email** the Agency Administrator of the agency that originally entered the data to inform that agency of the updated information. That Agency Administrator **shall be responsible** for placing an end date on the HMIS data or coordinating with the user who entered the data to place an end date on the information.

#### **Static Entry/Exit information:**

- **Risks:** Data conflicts with client information and possible changes to static entry/exit records.
- **Data Resolution Plan:** Never delete or modify another agency's entry/exits! Depending on the project type, clients may be entered into two projects at the same time, e.g. in a shelter and a rapid rehousing project. (If a user is unsure whether an entry/exit error exists, the user should review the training on entries and exits available at [HMIS@NCCEH](mailto:HMIS@NCCEH).) If an HMIS user becomes aware of an entry/exit error, e.g. the HMIS shows a client moving into housing on 7/1/2021, but the emergency shelter exit record has the client exiting shelter on 7/8/2021, the HMIS user should:
  1. **Contact** the agency/user that entered the incorrect data to seek to reconcile the data and have the agency/user with incorrect data correct the entry/exit.
  2. If unable to connect with the agency/user that entered the original data with a minimum of three attempts over a two-week period, **allow** the incorrect data to remain in the HMIS. **Send** an email message to the other agency's HMIS Agency Administrator asking the Agency Admin to review the data that is believed to be incorrect.
  3. If the incorrect data has not been corrected within thirty days after an email message has been sent to the Agency Admin, the user should **contact** the NCCEH Data Center for additional assistance.

#### **File Attachments:**

- **Risks:** File attachments may be deleted by others. Some file attachments might not be appropriate to share (medical information).
- **Data Resolution Plan:** Never delete or modify file attachments uploaded by someone else! The Durham CoC recommends that the following documents be uploaded/attached to the **Client Profile** page of every head of household:
  - A copy of the client's birth certificate

- A copy of any third party verification of homelessness
- A copy of any verification of disability, being careful to avoid including any information about specific diagnoses.
- If an agency wishes to disclose that it has a copy of a client's SSN in a hard copy file, the agency may upload a file attachment in this section inviting those who have a need for the SSN card to contact the agency OR the agency may add a "client note" on the Client Profile page inviting those who have a need for a copy of the SSN card to contact the agency. Copies of SSN cards themselves **should NEVER** be uploaded as a file attachment.

#### **Case Manager:**

- **Risks:** Agencies might not use this function actively, or it could become outdated and/or someone could modify/delete the case manager information.
- **Data Resolution Plan:** All projects and agencies should **identify** in the HMIS who the case manager is for each head of household. **Only users of that agency should modify/update/delete case manager information in the HMIS.**

#### **Needs/Services and Referrals (service transactions):**

- **Risks:** These entries may be edited and deleted by other agencies, and sometimes private/internal information that should NOT be shared lives in service transactions.
- **Data Resolution Plan:** Records of service transactions, referrals, and service needs **should never** be deleted. Projects currently using service transactions, needs, etc. should **continue** to do so. Case management time and case management notes **may be entered** into the service transaction record at the case manager's discretion and/or the requirements of an agency's services contract. Relevant documents, e.g. service agreements, may be uploaded to a service transaction.

#### **Client Notes (on Profile tab):**

- **Risks:** Notes can be edited and deleted by other agencies, sometimes more private/internal information lives in these notes.
- **Data Resolution Plan: General client notes should be entered in the "Notes" section of the Client Profile page.** Client notes **should never be deleted by anyone**, except that the person who entered the original note may delete notes that he/she/they entered.