Data Evaluation Committee Notes

1/26/22

**Present: Shaundell, Michele, Amanda, Owen, Cynthia, Kathy, Matt**

**December Meeting** – met but it was a small group so we didn’t meet the whole time and decided to wait until meeting with larger group to talk about what we wanted to focus on this year. Think I forgot to send out the notes from that meeting but will try and catch up on that when sending out notes from this meeting.

**Clarity Updates** – New system is being used! Seems to be going alright so far but there are some sharing settings issues, DIAL/SELF has noticed some issues with BCP data

-Owen offered to help if any other agencies run into this problem

-Bitfocus asked us to migrate data from our warehouse instead of the three different HMIS systems. Our sharing settings are set not to share clients created by an agency with staff at other agencies. Since we migrated data from the warehouse, client records were already merged in that warehouse and so transferred in merged. These merged records are defaulting to the earliest enrollment as the agency that “Created” the client, making other agencies working with that same client unable to see their record.

-Working on scheduling a meeting in February with TA providers (Doug Tetreault and Eric Gammons) to discuss opening up some sharing settings. Not everyone has to agree to share, but even if some agencies agree it would be helpful for smoothing things out in the system. Even if agencies share data, they can opt to make specific clients “private” and only visible to that agency.

-Have received a video from Bitfocus help desk staff explaining our different options and what that will look like in system, can share this video if anyone is interested

Owen – what's the realm of our understanding of the various privacy sharing setting options are within Clarity? To get us in a better position to talk about what the options might be. D/S has been more interested in minimizing sharing information and how it could impact re-writing releases and how to explain things to the youth

Kathy- once you open up sharing does that mean everybody from Louison House would be able to see everything in another agency? Can it be different by staff?

Can’t set sharing settings by staff person or individual clients but can make clients private to keep from other agencies seeing client even with open data sharing

Our primary options are to set sharing settings to “Not Shared”, “Basic Shared”, or “Full Shared” for a number of categories including Clients Created, Assessments/Services/Programs, Files, Notes, & Location. We would primarily be interested in sharing Clients Created and Assessments/Services/Programs. “Basic Shared” means that something is visible but not editable, and “Full Shared” means that something is both visible and editable by those at agencies the data are shared with. Michele’s recommendation to improve ease of use in our system is to set Clients Created to “full Shared” and Services/Programs/Assessments to “Basic Shared”. This would mean agencies have access to the same client record and make updates to that shared client’s demographics as needed and can enroll the same client in their programs as applicable. Agencies could see enrollments in programs at other agencies but not make any adjustments to that enrollment information.

Owen - Would it be possible to have default setting to make clients private when records are created? Could be difficult to turn on private setting for all current clients

Would be helpful! Michele will look into this possibility

Matt – wondering if when a shared document is opened and accessible to change, if a file is transferred to me by someone else, that person could see their entry and depending on the level of sharing set up for that particular file she can look in on that. Would there be stamps where if I’m doing an action on a file, it gets stamped on the date I do ‘x’. For accountability for who entered what when. If there is accountability on who is doing what would be helpful.

Michele – yes! For most actions in the HMIS we can see an “audit” of everyone who made changes and when those occurred.

-What do we need to consider if we end up opening some of our sharing settings?

Changes to our release of information

Owen- so for all existing releases, clients who are already enrolled, need to make sure we have a window of at least a month before opening sharing for case managers to meet with clients, explain difference, and have new release signed. Otherwise, if we make the change and haven’t had the opportunity to reach out to clients it’s a breach of trust. Likely impossible to get 100% but would be a larger conversation and attempts made. Period of time to let those currently on caseloads know and how it impacts their data being shared is important.

Kathy- already includes sharing in coordinated entry, not identical but pretty close. The difference of opening up one more agency, most won’t see a difference. Most adults won’t see a difference. Youth are generally a little more wary of data sharing.

Michele- some clients have opted against sharing so it might be hard to make case that the release covers this for clients

Matt- most agencies have a release of information signed for each agency sharing the information with. Maybe files can be toggled that release has been signed, is there a way we can say that whatever we’re deeming as information another agency should have then will build files /case notes/with other documents, is there way to streamline or integrate the process? Once I say it makes sense to talk to lawyer, I’m going to ask a client to sign a release to have conversations with x,y,z.

Cynthia- sharing settings will be set by Michele probably and wouldn’t be an option to change for specific agencies as clients agree

Matt- almost seems like it’s more blanketed as far as what the settings are, the level of agreement we’re all agreeing to as opposed to individually gandara level share vs a system which includes all CE agencies, etc.

Michele- Yes, things are pretty much split by agency, there isn’t much control at a per person level but there’s always the option to make specific client records or enrollments as “private” which hides their record from anyone not in that agency regardless of sharing settings. There can also be specific groups of agencies with particular sharing settings and sharing exceptions between agencies within those groups.

Cynthia- Owen mentioned that D/S works a lot with Gandara so maybe one of the groups could be sharing between D/S and Gandara?

Michele- could definitely do that, may make sense to even have a YHDP sharing group if agencies agree

Matt- because this is a collaboration, will sharing a client from CE to Gandara from D/S, have done warm handoff, there’s income verification they want to send to Gandara, is that something within the message system in Clarity? Or would they then have to do the sharing thing.

Michele- we can't send documents in HMIS messaging system but could be turn on sharing files optionally in agency sharing settings so that you’re just sharing files with. Otherwise would likely have to use the methods currently used to share documents.

Michele – will look through slack for others with this sharing settings issue and try and see if we can share access to the slack group.

Would also be helpful to find way to generate list of sharing groups at each agency so we have a good sense of the current configuration and can keep track of changes.

Possible changes to our release of information and notifications of changes

Cynthia- The possible need for release by agencies is due to agencies being able to choose to share less?

Owen- our release says we share data in certain ways and opt in/opt out of Ce is very clearly defined. If we open up to share data with another agency that level isn’t currently captured in release in the way it would need to be to be honest with clients. Maybe we add another checkbox to ask if we get permission to share data with other agencies to coordinated care. Then making sure we’re making that new release and giving agencies time to have clients re-sign release

Cynthia- maybe not all agencies will feel that new releases will be needed?

Kathy- most of the time no but it’s okay to have it in there, lots of adults have been through so many systems and sometimes share too much info. Younger clients may have more concern and some people definitely read it through and ask questions.

Owen- few clients actually read the release. Approaching in part from a liability for the agency. Most of the time youth/clients don’t really care or have capacity to care what’s in the release but for purpose of audits or if someone has a bad experience and looks at the release and gets a lawyer issues could come up. It would be good to state potential broader sharing settings in a release.

Cynthia- if releases are made very specific and next month or six months from now you want to add another agency to sharing

Michele – HUD is pushing hard to remove the release of information

Owen- agree that crafting a change to the release in a way that it’s general enough to future proof a little bit, probably have a good sense of who we’re going to share with in the future.

**Next Meeting** – 2/23/22 next meeting and point in time count!

**What else do we need to do to make sure our new HMIS is working properly?**

-we created the idea of “authorized signatories” who would be the person responsible for submitting requests for new clients and some other responsibilities in the new policies and procedures. Some confusion has come up with that name because it is also a legal term, should we change it?

-we have end user agreements in the system when logging in for the first time but don’t have agency agreements yet or a way to designate someone as an authorized signatory or the Partner Agency Privacy Officer.

-Michele needs to meet with each agency still on privacy and security, maybe this should happen after designating all of these individuals?

Has anyone started implementing new plans yet? How is that going?

**What do we want to focus on in 2022?**

Privacy & Security Plan

Data Quality Plan

Anything new HMIS related? Custom reports or dashboards? Exploring custom fields?

NOFO priorities – system performance measures & domestic violence agency engagement

Other HUD reports?