

Pasco County Continuum of Care

Homeless Management Information System

Policies and Procedures Manual Version 1.2

Updated: October 15, 2015

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Section A. HMIS Overview

Section A.1 Background

A Homeless Management Information System (HMIS) is a software application designed to record and store client-level information on the characteristics and service needs of homeless persons. An HMIS is typically a web-based software application that homeless assistance providers use to coordinate care, manage their operations, and better serve their clients. An HMIS knits together homeless assistance providers within a community and creates a more coordinated and effective housing and service delivery system.

The U. S. Department of Housing and Urban Development (HUD) and other planners and policymakers at the federal, state and local levels use aggregate HMIS data to obtain better information about the extent and nature of homelessness over time. Specifically, an HMIS can be used to produce an unduplicated count of homeless persons, understand patterns of service use, and measure the effectiveness of homeless programs.

The Pasco County Continuum of Care, Homeless Management Information System was started in 2003. Pathway Compass ROSE was designated as the Pasco County sole HMIS provider. The PATHWAYS COMPASS has been around since 1999 when it was developed to assist homeless service providers in Atlanta to share information and case manage their clients. By 2004, Pathways incorporated the HUD data standards and had added a number of agencies to the system from across the county. The Pasco County HMIS is a shared system; meaning agencies that are serving the same person can view information and coordinate services using HMIS.

Section A.2 HUD Data and Technical Standards

HUD published the Homeless Management Information System (HMIS) Data and Technical Standards Final Notice on July 30, 2004. The final notice describes the types of data that HUD-funded providers must collect from clients receiving homeless assistance services. The notice also presents privacy and system security standards for providers, Continuums of Care and all other entities that use or process HMIS data.

You can access the Data and Technical Standards at:

<https://www.onecpd.info/resource/3826/hmis-data-standards-manual/>

Section A.3 Annual Homeless Assessment Report (AHAR)

Over the past several years, Congress has directed the U.S. Department of Housing and Urban Development (HUD) to assist local jurisdictions in implementing Homeless Management Information Systems (HMIS) and in using data from these systems to obtain an unduplicated count of homeless persons, analyze local patterns of services usage, and assess local service needs.

The AHAR uses aggregate HMIS data from communities across the country to produce a national report on homelessness to the U.S. Congress. The AHAR is designed to:

- Develop an estimate of the number of homeless persons nationwide.
- Create a descriptive profile of homeless persons.
- Understand service use patterns.
- Estimate the nation's capacity to house homeless persons.

The AHAR is based on an unduplicated count of homeless persons within each community, and focuses on persons who use emergency or transitional shelters. Thus, the AHAR reports only on the number of sheltered homeless persons and does not account for homeless persons who: only use a supportive service program, are formerly homeless and living in permanent supportive housing; or are service resistant and do not access any type of homeless service program during the study period.

Pasco County HMIS will continue to submit to AHAR. Therefore, it is important that all programs, especially those that provide shelter and housing, enter data accurately and in a timely matter. For more information on Annual Homeless Assessment Report please visit www.onecpd.info

Section B. Pasco HMIS Organization and Management

Section B.1 Pasco County HMIS Organization

B1.1 Lead Agency

Pasco County HMIS is a collaborative effort to implement HMIS across Pasco County Continuum of Care. The Coalition for the Homeless of Pasco County Inc is the lead agency for the HMIS in the continuum of care. The Lead Agency is responsible for ensuring that the implementation is successful in the CoC.

B1.2 HMIS Coordinator

The Lead Agency within the continuum of care should have a representative or coordinator that will provide training and technical assistance to agencies using Pathways within Pasco County. The Coordinator is the lead contact for any HMIS issues in the CoC. The Coordinator is a liaison between Pathways, the CoC lead agency, and the CoC users.

B1.3 Pasco User Group

This is a group of representatives from CoC agencies that use Pathways HMIS. The group meets bimonthly to discuss data collection problems and solutions, receive training and updates, and give feedback to the CoC Lead Agency, CoC HMIS Coordinator, and Pathways

B1.4 Pathways Agency Administrator

Each agency using Pathways must designate a Pathways Compass Agency Administrator who will be the agency's main HMIS contact and will have the capability to configure Pathways Compass to mirror the services the agency provides. This person should be knowledgeable about the Pathways system and use the system often. They should also be in a position to relay all HMIS information to the Pasco User Group, the Lead Agency, the CoC, as well as communicating issues and concerns from their staff to these organizations.

Section B.2 Pasco County HMIS Goal

The goal of the Pasco County HMIS is:

- Assist homeless persons to navigate the Continuum of Care
- Assist homeless service agencies with information allowing them to better serve their clients
- Assist homeless agencies local, state, and Federal entities with information on numbers of homeless persons, reasons for homelessness, services they require, services they receive, gaps in services, etc.
- Collect data to ensure that all unmet needs are addressed

Section B.3 Lead Agency Responsibilities

The responsibilities of the Lead Agency are:

1. Ensuring that all agencies within the CoC are adhering to the State and Local CoC HMIS Policy and Procedures
2. Prepare CoC Application for renewal of HMIS grant funds
3. Responsible for the preparation and submission of the annual APR
4. Coordinate the preparation and submission of the AHAR
5. Responsible for all financial matter related to HMIS
6. Responsible for all service provider contracts with Pathways and all MOU with users
7. Responsible for HMIS coordination and staffing

Section B.4 HMIS Coordinator Responsibilities

The responsibilities of the HMIS Coordinator are:

1. Serve as a liaison between Pathways and Pasco HMIS user agencies.
2. Assist Pathways in training of Pasco CoC user agencies.
3. Monitor HMIS utilization and validate data entered by Pasco CoC User Agencies to ensure compliance with Pasco CoC HMIS Policies and Procedures.
4. Represent HMIS Lead Agency at all trainings, planning, and education HMIS meetings
5. Assess user operations to identify performance issues that would lead to the development and implementation of new training plan
6. Facilitate HMIS Lead Agency user group meetings comprised of user agencies
7. Participate in HMIS Lead Agency group collaborations for HMIS
8. Facilitate reporting for all HMIS statistics and user information
9. Communicate concerns, enhancement requests, and bugs to Pathways

Section B.5 Pasco CoC HMIS User Responsibilities

The responsibilities of the Users are:

1. Comply with all HUD Data Quality Standards Outlined in the HMIS Policies and Procedures Manual
2. Maintain compliance with HUD HMIS Privacy and Security Standards issued in the Federal Register on 7/30/2004
3. Send at least one representative to every HMIS User Training and HMIS User Group held by Pathways, the Lead Agency, or the HMIS Coordinator
4. Ensure that all program entry data is updated, entered, and completed by the fourth business day of the following month, unless told otherwise
5. Ensure all clients completing a program are exited with-in 72 hours.
6. All clients who have completed a program will have a follow-up after 30 days with an outcome posted in HMIS.

7. Acquire Authorization or Op-Out consent from every eligible client before entering him or her into Pathways
8. Maintain an active user name and password
9. Complete the annual Confidentiality and Ethics web course to maintain certificate
10. Communicate concerns, enhancement requests, and bugs to HMIS Coordinator
11. Request support and technical assistance to from HMIS Coordinator or Pathways

Section C. Pasco CoC HMIS Policies, Privacy, and Security

Section C.1 Pasco CoC HMIS Policies for Participation

Pasco CoC HMIS utilization policy and participation requirements are as follows:

1. HMIS user's fees are eligible expenses under Federal, State and County homeless grant funding. All Pasco CoC HMIS users receiving homeless funded grants will be required to pay a user license fee of \$250.00 per agency per year. The users fee would include system access to the Administrator and up to 4 staff members. All user licenses will include access to the system and user training. Additional licenses of 5 users may be obtained for \$250.00 per set. You will be required to de-activate all none users to maintain your 4 staff member access privileges.
2. CoC members not funded for homeless programs may obtain a 5 set user license for \$100.00 per agency per year. Agencies would receive Administrator training and staff training for up to 4 users and the Administrator. These licenses will be for services provided only.
3. Agencies who wish to use the HMIS but can prove a financial hardship may request a yearly waiver from the Executive Director, if approved the agency would receive a 5 license package for a year.
4. All Pasco CoC HMIS Users must actively participate in the user group meetings. The agency administrator or another HMIS knowledgeable staff member should represent agencies.
5. All Pasco CoC funded HMIS Agencies must provide a program profile for each program and/or project created in the HMIS and keep this information updated and accurate. If a shelter or housing program has beds in multiple counties, separate programs must be created for the beds in each jurisdiction.

6. All data elements relative to consumer profile, programs, and services must be entered into the HMIS within 72 hours of interaction with the consumer. (Details on data elements can be found in Section D of this manual.)
7. Efforts should be made to document all key service transactions provided to clients.
8. If a Pasco CoC HMIS User is not able to serve a particular client, the agency must make every effort to record “universal” data on the person into the HMIS and to make an appropriate referral to service providers based on the needs of the individual/family.
9. Documentation of client authorization/refusal must be maintained. Individuals refusing to authorize participation in HMIS should complete an Opt-Out Form that should be kept in their case record.
10. All persons who are “homeless” or near homeless should be entered into the HMIS regardless of whether or not they are served with federal funds.
11. In the event of conflict between federal, state and local government and/or local Continuum of Care HMIS policy, the higher standard must be met.
12. Failure to comply with Pasco CoC HMIS participation requirements may result in withholding of payments until compliance obtained.
13. Pasco CoC HMIS Agencies must allow the HMIS Coordinator to monitor participation through periodic monitoring visits and periodic review of data in the system by monthly reports and ranking systems.
14. The Coalition for the Homeless of Pasco County (lead Agency) reserves the right to terminate any agency for unauthorized use by its staff of employees.

Section C.2 Domestic Violence Agencies

According to the HUD Federal Register dated March 16, 2007 [FR-5056-N-01], agencies that are classified, as Domestic Violence Agencies should not enter any identifying information into HMIS. Specifically, the register states:

“The new Confidentiality provision directs victim service providers not to disclose, for the purposes of HMIS, personally identifying information about any client. In accordance with this statutory requirement, victim service providers must maintain the confidentiality of personally identifying information of the providers’ clients.”

At this point in time, HUD has instructed Domestic Violence agencies not to use HMIS to enter any client level information, including non-identifying information.

Section C.3 HMIS Privacy and Security Standard

HUD has established standards for the privacy and security of personal information collected and stored in an HMIS. The standards seek to protect the confidentiality of personal information while allowing for reasonable, responsible, and limited uses and disclosures of data.

The current HMIS Privacy, Confidentiality, and Security standards issued in the HUD Notice on July 31, 2004 require, but are not limited to: installing virus protection software, with an automatic update on every computer that accesses HMIS; activating a locking screen saver on every computer that accesses HMIS; developing a data privacy policy; posting the agency's privacy policy on its website (if one exists); installing an individual or network firewall; and posting "purpose for data collection" signs at each intake desk.

You can access the Data and Technical Standards at:

<https://www.hudexchange.info/resource/1318/2004-hmis-data-and-technical-standards-final-notice/>

Section C.4 Pathways Privacy Policy

Pathway Compass ROSE will not sell or rent personally identifiable information that is collected without that individual's permission.

Pathway Compass ROSE takes every precaution to protect the information of people who use their services. When sensitive information is submitted via Pathways website, that information is protected both online and offline. When case management system users are asked to enter sensitive information (such as a social security number) the information is encrypted. The servers that store personally identifiable information are kept in a secure environment, in a locked data center.

Pathway Compass ROSE employees who need the information to perform a specific job are granted access to personally identifiable information. Furthermore, all employees are kept up-to-date on security and privacy practices.

Section C.5 Security Policy

Pathway Compass ROSE places highest priority on the security of its systems, and the private information they contain

- **Confidentiality** - Access to client information must be tightly controlled and people with access to confidential information must understand their personal responsibility to maintain its confidentiality.
- **Integrity** - Client information must be protected so that it cannot be modified while in transit or storage. Reported data must be accurate.
- **Availability**- Systems must be available to users when and where they need them. If an employee leaves your agency, inform Pathways as soon as possible so that their account can be deactivated.
- **Information Security Procedures** - All Pathway Compass ROSE employees and volunteers are responsible for protecting the confidentiality and security of Pathways data systems and the human services client information they contain. Information concerning the security related tasks an employee is responsible for are included in the employee's

job description. The agency is responsible for ensuring that information that is printed from the PATHWAYS COMPASS is also kept confidential, private and secure

Section C.6 Client Grievances

If a client has a grievance regarding erroneous data entry or inappropriate use of their data, they will need to follow their service agency's established guidelines, standard operating procedures, or protocol on resolving these issues

Section C.7 HIPAA

Pathway Compass ROSE consulted with HIPAA experts at Price Waterhouse Coopers to ensure that its privacy and security features meet or exceed requirements of the Health Information Portability and Accountability Act (HIPAA). PATHWAYS COMPASS was one of the first such systems in the country to fully comply with HIPAA.

Section C.8 Access to Data

C8.1 Data Sharing

The Pathways HMIS gives individual clients complete control over which agencies can view their information. At point of service, the client may authorize an agency to access existing information in the HMIS or to add information about the client to the HMIS. When the client approaches another organization, the authorization process will be repeated. This ensures that no agency accesses a client's record without that client's specific permission.

The Pathways Compass system allows for data sharing across agencies, but also has security measures that help to limit data access across agencies. Color-coding within Pathways Compass application:

Dark Blue Areas: Information accessible for all authorized agencies.

Teal Areas: Information only accessible by the recording agency.

Red Areas: Information only accessible by the user entering the data within the agency.

C8.2 Revoking Authorization

The client has the right to revoke their authorization at any time for any reason. If the client wishes to revoke the client authorization, an Opt-Out client form should be completed, signed and dated and inserted into the client file. Additionally, Authorization should be turned off within Pathways Compass, which now would deny any member within the agency to access that client file

C8.3 Unauthorized Access to Pathways Compass System

Any user accessing the Pathways Compass system must be affiliated with an active member agency. Additionally, each system user must attend the required Confidentiality & Ethics Training or have completed a User Responsibility Form in order to be given a User Id and Password. Unauthorized access is prohibited and is grounds for legal action.

Section D. Data Entry and Data Quality

Section D.1 Release of Information Form (Client Authorization Form)

Prior to a client's data being entered into the Pathways Compass system, every user must read, complete and sign a Client Authorization Form for each agency that provides services to a client. This form allows them to decide if they wish to have their information entered in to the HMIS database. If the client agrees to have their information entered into the system, they must sign the Client Authorization Form. This Client Authorization Form should reside in the clients file for future verification and auditing purposes. If the client declines to have their information entered into the Pathways Compass system, the client information should not be entered in to Pathways Compass. The Client Authorization Form should reflect they declined and the form should be inserted into the client file for future verification and auditing purposes.

A Client Authorization Form should be completed for all unaccompanied adults. The Family Authorization Form should be completed for all Parent/Guardian with minor children. The Client Authorization Form and the Family Authorization Form is available for download from the Reports Menu under "Lists".

Client Opt-Out Form:

The client has the right to revoke their authorization at any time for any reason. If the client wishes to revoke the client authorization, an Opt-Out client form should be completed, signed and dated and inserted into the client file. Additionally, Authorization should be turned off within Pathways Compass, which now would deny any member within the agency to access that client file

Client Authorization Expired:

By default the duration will be 1529 days before a client requires another authorization. Once a client authorization is expired, the agency will have to obtain another signed authorization before they are able to enter additional information into the system.

Section D.2 Pasco CoC HMIS Required Data Elements

The HUD Data and Technical Standards outline two categories of required data elements: Universal Data Elements and Program Level Data Elements. Additionally, Pathways Compass and/or the Pasco CoC require additional data to be input in Pathways such as HPRP. At any time, these data elements may change under the decision of HUD. If this does happen, all agencies and users would be notified by the HMIS Coordinator and trained on the new standards.

Pasco CoC HMIS Agencies must enter all of the following required data elements into the HMIS system for all homeless or near-homeless persons that they assist.

Universal Data Elements

- Name
- Social Security Number
- Date of Birth
- Ethnicity

- Race
- Gender
- Veteran Status
- Disabling Condition
- Residence Prior to Program Entry
- Destination
- Relationship to Head of Household
- Length of Time on the Street, or Emergency Shelter
- Project Entry and Exit Date

Program Specific Data Elements

- Housing Status
- Income and Sources
- Non-Cash Benefits
- Health Insurance
- Physical Disability
- Developmental Disability
- Chronic Health Conditions
- HIV?AIDS
- Mental Health Problem
- Substance Abuse
- Domestic Violence
- Contact
- Date of Engagement
- Services Provided
- Financial Assistance Provided
- Referrals Provided
- Housing Assessment Disposition
- Housing Assessment at Exit

Additional Data Entry Requirements:

All individuals should be enrolled in the appropriate program on the date that they entered the program. If data is not entered on the same day, backdate the program entry date. All individuals should be discharged on the date that they leave the program. If the data is not entered on the same day, backdate the program exit date.

Service transactions should be logged every time that an individual receives services
Housing Status, Employment Status, Income Status, and Benefits Status should be updated upon program entry, program exit, and 30, 90 and 180 days after program exit

Section D.3 Client Intake, Program Enrollment and Program Discharge

Client Intake:

This is the process in which a client or potential client will go through a process where information is gathered and entered into the Pathways Compass system. Each agency should gather the Universal Data Elements and Program Level Data Elements (where required). Agencies can use their own in-house forms or can follow the Sample Intake Form provided by the HMIS Coordinator to gather the Data Elements. Client intake includes entering new client data or

updating information for a client that is already in the Pathways Compass system. Care should be taken to make sure that the client's information is updated (such as homeless status, marital status, household, etc.) each time the client file is reviewed.

Program Enrollment:

The Pathways Compass system includes a program enrollment wizard that allows the user to enroll a client into one or more programs. The client remains in the program based upon the expected length of stay as determined by the agency administrator. This requires programs to be configured prior to enrolling a client into a program.

Required and Suggested Client Data Updates:

At every subsequent visit by a client, the universal data elements should be verified to ensure the latest information in the client record is complete. Suggested updates that should also occur with each subsequent client visit should include: Services Rendered, Household composition, Veteran Status, Education Status, Homeless Status, and Disability. While there are more suggested data elements, updating information on a client should occur as often as reasonable possible.

Program Discharge:

In order for a client to be discharged from a program, the client must first be enrolled in a program. Once the client has completed, left the program without completion or the time has expired for the client to be in the program, such as Emergency Shelter or Transitional Housing, the client should be discharged from the program. The Pathways Compass system includes a discharge wizard, which guides the user through the process of collecting required information when a client leaves a program. Failure to discharge the client on a timely basis will skew the data and will impact the accuracy of reporting, such as the HUD APR Entry Report and the HUD APR Exit Report.

Section D.4 Timing of Data Entry

All data elements relative to consumer profile, programs, and services must be entered into the HMIS within 72 hours of interaction with the consumer. When client information is entered, the dates entered for enrollment and discharge should be the ACTUAL dates that an individual entered or left the program, not the date of data entry/update.

Section D.5 Data Integrity and Quality

HMIS data quality refers to the ability of the data to accurately reflect the real world. Presenting accurate, consistent and timely information on homelessness is critical in order to draw reasonable conclusions about the extent of homelessness and the impact of homeless services.

Importance of Data Quality:

- **The extent of homelessness** – By collecting personal information on all clients served, HUD hopes to generate an estimate of the unduplicated count of homeless people that access services nationally. Achievement of this goal depends on high quality personal identifying data, such as Social Security, names, gender, date of birth, which is used to create unduplicated counts.

- **The nature of homelessness** – Additional HMIS data elements focus on the characteristics of those engaged in homeless services. High quality data on gender, date of birth, race, ethnicity, veteran’s status and disability, and household composition are needed for this goal
- **Homeless service use patterns** – Accurate program entry and exit dates and information on residence prior to program entry are critical in determining service use patterns that assess average length of stay and movement among different homeless programs. The collection of accurate identifying information at each program is also necessary in order to identify the extent to which clients appear in multiple programs, how clients move through the system, and to detect cycles of homelessness.
- **The effectiveness of the homeless service system** – Information at program entry and exit, such as destination and income, are important to learn if and how the system has helped to resolve clients’ housing crisis and to improve their overall stability. Data on returning clients also contribute to this goal. Comparing program entry data with program exit data at the aggregate level will also provide a picture of homeless program impacts on the clients they serve.

Improving data quality:

- One of the most effective ways to collect quality data is to develop collection and data entry standards that are implemented by all agencies entering data into the Pathways Compass HMIS system.
- There should be a shared understanding of purpose and process. Minimally, each staff member should have a document that outlines the data collection process and explains the importance of accurate data and maintaining data quality.
- Establish a Rapport with Consumers. Often people in a vulnerable position of being homeless may give incorrect information intentionally or unintentionally for a host of reasons. Establishing a rapport with the consumer can minimize inaccurate information.
- Paper forms should closely resemble the layout of the Intake screens within the Pathways Compass system. Then proofreading a hard copy of the data that has been entered.
- Emphasize and communicate any issues with data quality into already scheduled staff meetings.

Reducing Duplicates:

All efforts should be taken to ensure duplicate records are not created within the Pathways Compass system. Conducting a thorough client search at Intake will help reduce the number of duplicates within the system. For further instructions on how to conduct a client search to avoid duplicates, refer to the Pathways Compass User Guide or click on the Conducting a client search tutorial. If you do create a duplicate, please contact either the HMIS Coordinator or Pathways Support regarding ways to eliminate the duplicate.

If the duplication file cannot be eliminated please provide a mail message on the duplicate file to direct all other Pasco CoC HMIS User to the correct file. For further instruction on how to provide a mail message please refer to the Pathways Compass User Guide.

Section D.6 Monitoring

Agency Administrator will monitor any new user for data quality by running the PED (program enrollment and discharge) report looking for missing or inaccurate data, and provide additional training if needed. The agency administrator will run monthly APR (annual performance report) to check for missing and/or refused data.

HMIS Coordinator will run both the PED and the APR monthly, and reports will be provided to the agency administrator for any corrections that need to be made.

Section E. Reporting

Section E.1 Overview of Available Reports

Pathways Compass has an abundance of standard reports that can be accessed by any user that has access rights. For a complete list of Reports and detailed information about them, refer to the Reports User Guide located under the Forms, Document, and Videos link available at www.pathwaystraining.org

It is recommended that all Pasco CoC HMIS Users complete the Pathways Compass web-based Reports Training. This will explain in detail how each frequent report is generated. For further information on Report Training dates please visit www.pathwaystraining.org and visit the Training Schedule Link.

Section E.2 Running the APR Entry Report

For agencies that receive McKinney Vento funding and are required to run a HUD APR, the following information must be captured in the Pathways Compass system. Access to the Client Menu and the Reports Menu are required.

Data entry requirements for the HUD APR Report:

1. At least one member of the household must be enrolled in the program, either before or during the reporting period.
2. All household members must be entered in the system with the correct Date of Birth, Gender, Race, Ethnicity, Veteran status, Disabled status, and Special Needs status. They must be grouped together in a single Pathways Compass Household List.
3. Homeless, Chronically Homeless, and Prior Night's Residence status must be entered with a transaction or entry date within the reporting period. If multiple statuses exist within the period, the earliest one is used.

Steps to process an APR Entry Report

1. From the Main menu, choose Reports.
2. From the Reports menu, choose the Statistical Reports Category.
3. From the Statistical Reports Category, choose the Program Entry Report (HUD APR Format).

4. Enter the beginning date for the first day to include in the report.
5. Enter the ending date for the last day to include in the report.
6. Select the Program Name

Section E.3 Export Function

The Pathways Compass Data Export feature creates a CSV format data file containing information about client demographics and transactions. Such a file can then be downloaded to your local computer and imported into a spreadsheet or database application. Once the information is in your local application, it can be processed, viewed, printed, etc. according to the needs of your agency.

Comma Separated Values (CSV) is a format for a data file that is commonly used to transfer information from one computer system to another. Practically every major spreadsheet and database application can import and work with data that is formatted this way. Examples of such applications include Microsoft Excel, IBM Lotus 1-2-3, OpenOffice.org Calc, Microsoft Access, OpenOffice.org Base, and many others.

Pathways Compass can create several different CSV data files, containing different information. For a description of these files and the menu commands and parameters needed to create them, see the section Data Exports in the Reports Guide.

Section E.4 Filter Reports

Pathways has incorporated into the Statistical Standard Reports the ability to filter a report by Need Code, Outcome, Homeless Status, Chronically Homeless Status, Referral Status, Disbursement, Reservation and Area (by County, City or Zip Code).

Section E.5 Oracle Discoverer

This ad hoc reporting tool allows for additional manipulation of data fields. Users have the ability (based upon business views) to manipulate formatting, creating graphs, analyze data via pivot tables, use drilling, parameters, conditions, totals, percentages, calculations, sorting data, sharing and printing reports. There is an additional charge for the Oracle Software. Please contact a Pathways representative to find out more about Oracle Discoverer.

Section F. System Support, Training and Technical Assistance

Section F.1 Reporting System Issues

Pathways provide several ways in which to report system outage, problems, or questions. Users can communicate with the Support Team by:

Email: support@pcni.org Phone: 404-639-9933 ext. 308 (local)
Phone: 866-818-1032 ext. 308 (toll free)

Pasco CoC HMIS Users may also contact the HMIS Coordinator by:
Email: hmiscarla@verizon.net Phone: 727-842-8605 x 7000 Fax: 727-842-8538

System Errors - General Guidelines

Any system error reports, system outages, enhancement request should be submitted by one of three methods: a) email; b) the error-reporting feature within the system; or c) via fax to the Support Team. If request or system problems are submitted to other internal staff members this information should be forwarded to the Support Team. In which case, any problem or request should be entered into the Sales Force CRM. It is also encouraged that the message be relayed that Phone request are discouraged as it does not provide adequate documentation of who, when, where, what and other specifics that are needed to maintain an accurate listing of all support queues.

Minor quick system errors:

System errors that are reported to Support are tested to confirm it in fact is a system error. The error is discussed with the Development Team for a timeline for completion. The Development Team fixes and then sends to QA for testing. The client is notified.

Major system errors:

System errors that are reported to Support are tested to confirm it in fact is a system error. The error is discussed with the Development Team for a timeline for completion. A timeline estimate indicates this is not a quick fix.... A resource is assigned to work on the error. The Development Team interacts with Support to ensure the details are correct. The Development Team fixes and then sends to QA for testing. Client is notified.

Section F.2 Requesting Enhancements

An enhancement to the system includes an additional data element, report, or function that was not previously in the system. Enhancements do not include fixing an existing function of the system. System errors should be communicated directly to Pathways Support. If Pathways Support determines the request is an enhancement rather than a System Error, they will communicate this to the requestor who should then follow enhancement request protocol. All system enhancement requests are to be communicated through the agency administrator who will then communicate the request to the HMIS Coordinator.

Section F.3 Accessing Training and Technical Assistance

To assess the various trainings for HMIS, visit www.pathwaystraining.org and select Training Schedule. You can register online, by email at support@pcni.org or by phone at: 404-866-1032 ext. 308 or toll free at 866-818-1032 ext. 308. If you register for an on-line training class please notify the HMIS Coordinator with 72 hours.

Section G. Agency and User Setup

Section G.1 New Agency Procedures

Step 1. Sign Agency Agreements

1. Complete General Service Agreement Form
2. Complete Business Associate Addendum
3. Complete New Agency Form
4. Ensure system and equipment requirements are met
5. Complete Memorandum of Agreement (MOA) with Pasco County CoC Lead Agency

All agency forms should be completed and returned to the HMIS Coordinator and Pathways Support by fax or mail. Each New Agency must keep a copy of all documents for agency files.

Step 2. Ensure Agency Meets Technical Requirements

Recommended Computer Specifications

- Processor: 300 MHz Processor PC
- Operating System: Windows 98 or above
- Memory: 128 MB RAM
- Browser: Internet Explorer 5.0 or greater, Mozilla Firefox
- Internet Access: DSL or better

Step 3. Designate Pathways Compass Agency Administrator

This individual(s) will have the capability to configure the Pathways Compass HMIS system to mirror the services the agency provides. The Administrator will be able to configure/update: Agency info, custom fields, Funds, Keywords, Programs, Program Profile, Reasons, Referrals, Services, Beds, Admissions, Homelessness, Sites, Assessments, Reservations and Users. This individual will also want to sign up for the Agency Administrator Training that is provided.

Step 4. Set up Programs and Complete Program Profiles (HMIS Coordinator ONLY)

Each Agency will need to complete a Program Profile for each type of Program that is captured in the Pathways Compass system. This profile will allow for better tracking of data and quality control, rendering more effective use of the system as well as quality data needed for HUD reporting.

Agencies should use the following guidelines when completing program profiles for HMIS:

- All programs which provide shelter or housing must set up a program in the HMIS System.
 - Separate programs should be set up for emergency shelter, transitional housing, permanent supportive housing, overflow and winter shelter, and vouchers.
- Programs cannot be more than one type
 - If services are provided as part of enrollment in a shelter or housing program, the agency does not have to set up a separate program for these services unless the agency chooses to do so.
- If a service program is required to produce an Annual Progress Report for HUD, they must set up a program in HMIS.

Step 5. Designate who will be authorized system users and their access level

It should be determined who within the Agency will be utilizing the Pathways Compass system. For each User, a User Access Checklist (UAC) will need to be completed. The UAC determines each Users access to the Client and Client Visit Menu, the Reports Menu, and the My Agency Menu.

Section G.2 New User Procedures

Before starting any training you will need to down load Java Runtime Environment

Microsoft has announced as of April 2014, no further support for Windows XP and Internet Explorer 8 will be available. With this consideration, we understand that this may be an issue for some of our users.

Pathways uses HTML5 programming which allows for mobile devices to access the training site. As well, we use Google Docs for tracking of test results. Because Microsoft will no longer support updates, and this could result in security issues for IE8 users **Pathways encourages using one of the alternate browser option listed below.**

[Click here to Download Firefox](#)

[Click here to Download Safari](#)

[Click here to Download Chrome](#)

[Click here to Download Opera](#)

Every new user must attend the Confidentiality and Best Practices training.

Step 1: The agency administrator will designate a user access level and complete the *User Access Check list* along with the *User Responsibility Statement* and return it to the HMIS Coordinator with-in five (5) days.

Every new user must attend the Confidentiality and Best Practices training.

Step 2: To Access Training:

Go to www.pathwaystraining.org

Next click on *Online Training*, on the next page click, *Confidentiality Training*.

Follow on prompts.

Step 3: Attend New User Training

Go to www.pathwaystraining.org

Next click on *Online Training, New User Training*

Follow prompts.

Step 4: To Obtain a Password

Each Pathways user is required to maintain a private password that allows them access to the system. **This password is not to be shared with anyone.** The password is set up by the HMIS Coordinator once a new user completes the Confidentiality Training test with a 70% passing score, along with the New User Training. Each subsequent year the system user is required to be re-certified (attend another Confidentiality Training and pass). Each new user will receive an email with their scores. The HMIS Coordinator will then issue the User ID and a temporary password to activate their account. The account becomes active once the user has logged in with their user ID and created a new password, log in should be done with-in the first twenty four hours. Your ID will always remain the same.

Step 5: First time logging into Pathways Compass

Go to www.community.pcni.org/your-community/pasco

Click on the “Assess HMIS” icon

Next, type in your user ID and temporary password.

You will receive a message saying your password has expired, please provide a new one. This new password should be 8 to 14 characters and must include at least one number. It cannot include your name or the name of your agency. You should now see the search page.

- If this is your first time logging on, you will need to click on the link for the Java Runtime Environment download. Follow the prompts. Once you have downloaded the JRE download, you will need to go back to the instructions box.
- If you do not receive your temporary password, it may be that an email address was not provided. The email address provided may not have been legible, or the system may not have sent it as it should have.
- If your password expires, please contact the HMIS Coordinator.

Section H. Contact Information

Problem / Question	Contact Person
Problem with computer or internet Connection	The IT person at your agency
Problem with logging onto Pathways or a problem using Pathways	HMIS Coordinator (coalitionhmis@verizon.net) 727-849-0816
Error while you are using Pathways	Press the “Contact Support” at the bottom right in Compass or contact Pathways Support or HMIS Coordinator
Questions about Training or Technical Assistance Available	Pathways Support or www.peni.info HMIS Coordinator
Requests for Enhancements to Pathways	HMIS Coordinator
Questions about Local Continuum Policies	Lead Agency Coalition for the Homeless of Pasco County Inc. 727-842-8605
Questions about Pasco CoC HMIS Policy and Procedures	HMIS Coordinator

Section I. Pasco CoC HMIS Agencies and Additional Resources

Section I.1 Pasco CoC HMIS Agencies

Project Name	Type
Ace Opportunities	A2O
Agency Community Treatment Services Inc. (ACTS)	ACTSTAM
Baycare Behavioral Treatment Services Inc.	B5I
Catholic Charities	J8D
Coalition for the Homeless of Pasco County	H8E
Connections Job Development	C2S
Directions for Living	DFL
Impact Family Ministry	IFM1
Metropolitan Ministries	JHCM
Mid Florida Community Services	MFCSI
Pasco County Division of Human Services	G4B
Pasco County Housing Authority	P4A
Pasco County Mobile Care Unit	PAMCU1
Restored Hope	RESHOP
STEPS to Recovery, Inc.	S3R
Salvation Army Pasco County	T5P
Samaritan Project of Zephyrhills	S4Z
Society of St. Vincent de Paul	S1V
The Prayer House dba The Rope Center	T3C
United Way	U2W
Youth and Family Alternatives	8K3

Section I.2 Additional Resources

Pathways Website:

www.peni.info

Coalition for the Homeless Of Pasco County Inc. Website: www.pascohomelesscoalition.org

HUD HMIS Info Website:

www.hmis.info

HPRP Information Website:

www.hudhre.info

One CPD Information Website:

www.onecpd.info

Acronyms	Definitions
AHAR	Annual Homeless Assessment Report
APR	Annual Performance Report
CDBG	Community Development Block Grant
CoC	Continuum of Care
Con Plan	Consolidated Plan
CPD	Community Planning and Development
Data Warehouse	Information system storing program and operation data
ES	Emergency Shelter
ESG	Emergency Solution Grant
FMR	Fair Market Rent
HIC	Housing Inventory Count
HMIS	Homeless Management Information System
HOPWA	Housing Opportunities for Persons with AIDS
HRE	Homelessness Resource Exchange
HUD	Us Department of Housing and Urban Development
IDIS	Integrated Disbursement and Information System
NOFA	Notice of Funding Availability
OMB	Office of Management and Budget
PIT	Point in Time
PBRA	Project Based Rental Assistance
PRN	Pro Rata Need
PSH	Permanent Supportive Housing
RHSP	Rural Housing Stability Program
S+C	Shelter plus Care
SHP	Supportive Housing Program
SRA	Sponsor-based Rental Assistance
SRO	Single Room Occupancy
SSO	Supportive Services Only
SSVF	Supportive Services for Veteran Families
Super NOFA	HUD's consolidated approach to issuance of Notice of Funding Availability
VI-SPDAT	Vulnerability Index-Service Prioritization Decision Assistance Tool
TBRA or TRA	Tenant Based Rental Assistance
TH	Transitional Housing

Participation Agreement

Source: Pasco County CoC Homeless Management Information System

Description: This participation agreement between the lead agency and participating agencies specifies the rights and responsibilities of each party.

Participation Agreement between Coalition for the Homeless of Pasco County HMIS Lead Agency and

This agreement entered into on _____ between the Coalition for the Homeless of Pasco County HMIS, hereafter known as "HMIS Lead Agency," and _____, hereafter known as "Agency," regarding access and use of the Homeless Management Information System database, hereafter known as "HMIS/CMIS."

I. Introduction

The HMIS, a shared human services database, allows authorized personnel at homeless and human service provider agencies throughout Pasco County, to enter, track, and report on information concerning their own clients and to share information, subject to appropriate inter-agency agreements, on common clients.

HMIS's goals are to:

- Improve coordinated care for housing assistance programs and services to homeless persons in Pasco County;
- Provide a user-friendly centralized intake records system that expedites client intake procedures;
- Improves referral accuracy, and supports the collection of quality information that can be used for program improvement and service-planning, and
- Meet the reporting requirements of the U.S. Department of Housing and Urban Development (HUD), and other funders as needed.

In compliance with all state and federal requirements regarding client confidentiality and data security, the HMIS is designed to collect and deliver timely, credible, quality data about services and homeless persons or persons at risk of homelessness. The Coalition for the Homeless of Pasco County administers the HMIS through a direct project grant with the Department of Housing and Urban Development (HUD).

II. HMIS Responsibilities

1. HMIS will provide the CoC Partner Agencies 24-hour access to the Pathway's Compass HMIS data-gathering system, via internet connection.
2. HMIS can provide model Privacy Notices, Client Consent and Release forms and other templates for agreements that may be adopted or adapted in local implementation of HMIS functions.

3. HMIS will provide both initial training and periodic updates to that training for Agency Staff regarding the use of the HMIS.
4. HMIS will provide basic user support and technical assistance (i.e., general trouble-shooting and assistance with standard report generation). Access to this basic technical assistance will normally be available from 8:30 AM. to 4:30 PM. on Monday through Friday (with the exclusion of holidays). HMIS Regional Administrator can also be accessible during non-standard operating hours as needed or requested.
5. HMIS will publish reports on client data quality at specific agencies or persons, without prior agency (and where necessary, client) permission to the HMIS committee. Public reports otherwise published will be limited to presentation of aggregated data within the HMIS database.
6. HMIS's publication practice will be governed by policies established by the HMIS committee operating at the CoC level.

III. Privacy and Confidentiality

A. Protection of Client Privacy

1. HMIS participating Agency will comply with all applicable federal and state laws regarding protection of client privacy.
2. HMIS participating Agency will comply specifically with Federal confidentiality regulations as contained in the *Code of Federal Regulations, 42 CFR Part 2*, regarding disclosure of alcohol and/or drug abuse records.
3. HMIS participating Agency will comply specifically with the *Health Insurance Portability and Accountability Act (HIPPA) of 1996, 45 C.F.R., Parts 160 & 164*, and corresponding regulations established by the U.S. Department of Health and Human Services.
4. HMIS participating Agency will comply with all privacy rules specified in the CoC Full Privacy Notice.
5. HMIS participating Agencies will comply with all policies and procedures established by the HMIS Lead Agency pertaining to protection of client privacy.

B. Client Confidentiality

1. HMIS participating Agency agrees to provide a copy of HMIS Brief/Summary *Privacy Notice* (or an acceptable Agency-specific alternative) to each client. The Agency will provide a verbal explanation of the HMIS and arrange for a qualified interpreter/translator in the event that an individual is not literate in English or has difficulty understanding the *Privacy Notice* or associated Consent or Release of information form(s).
2. HMIS participating Agency will not solicit or enter information from clients into the HMIS database unless it is essential to provide services or conduct evaluation to determine program or service eligibility.
3. HMIS participating Agency will not divulge any confidential information received from the HMIS to any organization or individual without proper written consent by the client, unless otherwise permitted by applicable regulations or laws.
4. HMIS participating Agency will ensure that all persons who are issued a User Identification and Password to the HMIS abide by this *Participation Agreement*, including all associated confidentiality provisions. The Agency will be responsible for oversight of its own related confidentiality requirements.

5. HMIS participating Agency agrees that it will ensure that all persons issued a User ID and Password will complete a formal training on privacy and confidentiality and demonstrate mastery of that information, prior to activation of their User License.
6. HMIS participating Agency acknowledges that ensuring the confidentiality, security and privacy of any information downloaded from the system by the Agency is strictly the responsibility of the Agency.

C. Inter-Agency Sharing of Information

1. HMIS participating Agency acknowledges that all forms provided by HMIS regarding client privacy and confidentiality are shared with the Agency as generally applicable template that may require specific modification in accord with Agency-specific rules. The Agency will review and revise (as necessary) all forms provided by HMIS to assure that they are in compliance with the laws, rules and regulations that govern its organization.
2. HMIS participating Agency agrees to implement a procedure for all routine sharing practices with partnering Agencies.
3. HMIS participating Agency acknowledges that informed client consent is required before any basic identifying client information is entered into Pathways or shared with other Agency's in the System. The Agency will document client consent (client signature) on the centralized intake application.
4. If the client has given approval through a completed centralized intake application, the Agency may elect to share information according to the procedures for sharing with other partnering agencies in HMIS.
5. HMIS participating Agency will incorporate an HMIS Release of Information clause into its existing *Agency Authorization for Release of Information Form(s)* if the Agency intends to share restricted client data within the HMIS. Restricted information, including progress notes and psychotherapy notes, about the diagnosis, treatment, or referrals related to a mental health disorder, drug or alcohol disorder, HIV/AIDS, and domestic violence concerns shall not be shared with other participating Agencies without the client's written, informed consent as documented on the Agency-modified *Authorization for Release Form*. Sharing of restricted information is not covered under the general HMIS *Client Release of Information*. Sharing of restricted information must also be planned and documented through a fully executed *policies and procedure*.
6. Agencies with whom information is shared are each responsible for obtaining appropriate consent(s) before allowing further sharing of client records.
7. HMIS participating Agency acknowledges that the Agency, itself, bears primary responsibility for oversight for all sharing of data it has collected via the HMIS.
8. HMIS participating Agency agrees to place all *Client Authorization for Release of Information* forms related to the HMIS in a file to be located at the Agency's business address and that such forms will be made available to the HMIS Lead Agency for periodic audits. The Agency will retain these HMIS-related *Authorizations for Release of Information* forms for a period of 7 years, after which time the forms will be discarded in a manner that ensures client confidentiality is not compromised.
9. HMIS participating Agency acknowledges that clients who choose not to authorize sharing of information cannot be denied services for which they would otherwise be eligible.

D. Custody of Data

* Coalition for the Homeless of Pasco County Policies and Procedures *

1. HMIS participating Agency acknowledges, and HMIS Lead Agency agrees, that the Agency retains ownership over all information it enters into the HMIS.
2. In the event that the HMIS Project ceases to exist, Member Agencies will be notified and provided reasonable time to access and save client data on those served by the agency, as well as statistical and frequency data from the entire system. Thereafter, the information collected by the centralized server will be purged or appropriately stored.
3. In the event that HMIS Lead Agency ceases to exist, the custodianship of the data within HMIS will be transferred to another designated organization for continuing administration, and all HMIS Member Agencies will be informed in a timely manner.

IV. Data Entry and Regular Use of HMIS

1. HMIS participating Agency will not permit User ID's and Passwords to be shared among users.
2. If a client has previously given the Agency permission to share information with multiple agencies, beyond basic identifying information and non-restricted service transactions, and then chooses to revoke that permission with regard to one or more of these agencies, the Agency will contact its partner agency/agencies and explain that, at the client's request, portions of that client record will no longer be shared. The Agency will then "lock" those portions of the record, impacted by the revocation, to the other agency or agencies.
3. HMIS participating Agency will enter all required data elements and program specific data elements as defined for all persons who are participating in services or programs funded by HUD, or other federal and state agencies.
4. HMIS participating Agency will enter data in a consistent manner, and will strive for real-time, or close to real-time, data entry.
5. HMIS participating Agency will review records it has entered in the HMIS for completeness and data accuracy. The review and data correction process will be made according to HMIS' published *Policies and Procedures*.
6. HMIS participating Agency will not knowingly enter inaccurate information into HMIS.
7. HMIS participating Agency acknowledges that with a current standard HMIS *Client Release of Information* form on file, it can update, edit, and print out a client's information. Once the HMIS *Client Release of Information* expires, the Agency can no longer edit or print the record.
8. HMIS participating Agency acknowledges that once that *Client Release of Information* expires, any new information entered into the database will be closed to sharing. Information entered before the date of the expired release will continue to be available to the sharing partners.
9. HMIS participating Agency acknowledges that a modified agency *Authorization to Release Information* form, with an HMIS clause, permits it to share restricted client information with select agencies in compliance with the Agency's approved Confidentiality Policies and Procedures.
10. HMIS participating Agency acknowledges that special needs screen can only be edited by the individual that originally enters the data. The Agency will create a separate special needs entry, as needed, to indicate a change in a client's status, enter updates, or edit incorrect information.
11. HMIS participating Agency will prohibit anyone with an Agency-assigned User ID and Password from entering offensive language, profanity, or discriminatory comments based on race, color, religion, national origin, ancestry, handicap, age, sex, and sexual orientation.
12. HMIS participating Agency will utilize the HMIS for business purposes only.
13. HMIS participating Agency will keep updated virus protection software on computers that access the HMIS.
14. Transmission of material in violation of any United States Federal or State regulations is prohibited.
15. HMIS participating Agency will not use the HMIS with intent to defraud the Federal, State, or local government, or an individual entity, or to conduct any illegal activity.

16. HMIS participating Agency agrees that the HMIS Lead Agency or the local Continuum of Care Planning Committee may convene local or regional User Meetings to discuss procedures, updates, policy and practice guidelines, data analysis, and software/ hardware upgrades. The Agency will designate at least one specific Staff member to regularly attend User Meetings.

V. Publication of Reports

1. HMIS participating Agency agrees that it may only release aggregated information generated by the HMIS that is specific to its own services.
2. HMIS participating Agency acknowledges that the release of aggregated information will be governed through policies established by relevant committees operating at the HMIS level for statewide analysis and at the Continuum of Care level for community-level analysis.

VI. Database Integrity

1. HMIS participating Agency will not share assigned User ID's and Passwords to access the HMIS with any other organization, governmental entity, business, or individual.
2. HMIS participating Agency will not intentionally cause corruption of the HMIS in any manner. Any unauthorized access or unauthorized modification to computer system information, or interference with normal system operations, will result in immediate suspension of services, and, where appropriate, legal action against the identified offending entities.

VII. Hold Harmless

1. The HMIS Lead Agency make no warranties, expressed or implied. HMIS participating Agency, at all times, will indemnify and hold HMIS Lead Agency harmless from any damages, liabilities, claims, and expenses that may be claimed against the Agency; or for injuries or damages to the Agency or another party arising from participation in the HMIS; or arising from any acts, omissions, neglect, or fault of the Agency or its agents, employees, licensees, or clients; or arising from the Agency's failure to comply with laws, statutes, ordinances, or regulations applicable to it or the conduct of its business. This Agency will also hold HMIS Lead Agency harmless for loss or damage resulting in the loss of data due to delays, non-deliveries, mis-deliveries, or service interruption caused by Pathway's Compass Systems, by the Agency's or other member agency's negligence or errors or omissions, as well as natural disasters, technological difficulties, and/ or acts of God. HMIS Lead Agency shall not be liable to the Agency for damages, losses, or injuries to the Agency or another party other than if such is the result of gross negligence or willful misconduct of HMIS Lead Agency.

VIII. Terms and Conditions

1. The parties hereto agree that this agreement is the complete and exclusive statement of the agreement between parties and supersedes all prior proposals and understandings, oral and written, relating to the subject matter of this agreement.
2. The Agency shall not transfer or assign any rights or obligations under the *Participation Agreement* without the written consent of HMIS Lead Agency.
3. This agreement shall remain in force until revoked in writing by either party, with 30 days advance written notice. The exception to this term is if allegations or actual incidences arise regarding possible or actual breaches of this agreement. Should such situations arise, the HMIS may

immediately suspend access to the HMIS until the allegations are resolved in order to protect the integrity of the system.

4. This agreement may be modified or amended by written agreement executed by both parties with 30 days advance written notice.
5. The parties agree that the terms, conditions and agreements contained in this *Participation Agreement* may not be changed without the express written consent of HMIS Lead Agency.

**IN WITNESS WHEREOF, the parties
have entered into this Agreement:**

AGENCY:

County

By: _____

Title: _____

Date: _____

HMIS Lead Agency:

Coalition for the Homeless of Pasco

By: _____
Signature

Title: _____

Date: _____