

How-To Guide: Restricting Client Records in HMIS

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Overview & Partner Agency Responsibilities

!! End Users are **NEVER to restrict an HMIS client record from the Client Profile tab !!**

Please contact the HMIS Help Desk if you have any questions OR feel that a record needs to be restricted on the Client Profile tab in addition to the project enrollment record from the Entry / Exit tab

When a client signs the '**HMIS Client Data Sharing Opt-Out Form**' they are **opting out** of full data sharing with the MD BoS HMIS Partner Agencies & will need to specify their preferences for sharing amongst Partner Agency projects in the MD BoS HMIS. In addition, if the client does not wish to share information with the MSHDW, they will need to complete the form and select Option 3.

- **Option 1:** CONSENT to share **only** with the LHC's MD BoS CE project
- **Option 2:** DENY consent to share with other MD BoS HMIS Partner Agencies
- **Option 3:** DENY consent to share with the MSHDW

The Partner Agency will then complete the steps outlined in this document, based on the clients selection, to properly restrict the clients HMIS record.

1. End User witnessing client signature must – **within 24hrs** of client signing:
 - a. **Sign** the 'Partner Agency Staff Signature' below the clients signature
 - b. **Restrict** the HMIS client record by following the steps outlined for sharing option(s) selected
 - c. **Upload** a copy of the signed *HMIS Client Data Sharing Opt-Out Form* to the 'File Attachments' section in the clients HMIS record
 - d. **Notify** the Partner Agency HMIS PoC that the client has completed the '*HMIS Client Data Sharing Opt-Out Form*'
2. HMIS Agency Point-of-Contact (PoC), **within 48 hours** of the client signing, must:
 - a. **Confirm** the correct HMIS client enrollment has been properly restricted & that the '*HMIS Client Data Sharing Opt-Out Form*' has been uploaded to the clients HMIS record
 - b. **Notify** the MD BoS HMIS Team that a client has completed the '*HMIS Client Data Sharing Opt-Out Form*' by submitting a ticket to the HMIS Help Desk and identifying the client by providing the clients HMIS ID number

Instructions to Restrict HMIS Client Records

Option 1: CONSENT to Share Only with LHC's CE Project

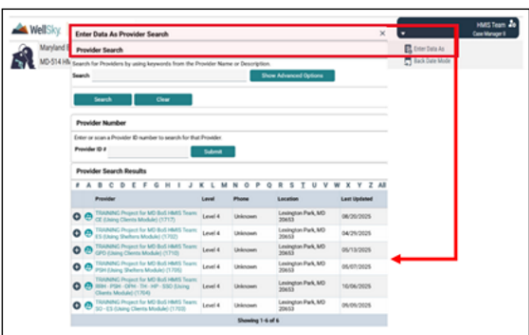
!! End Users are **NEVER to restrict an HMIS client record from the Client Profile tab !!**

Step 1.

- Log into HMIS

Step 2.

- Click **Enter Data As** – then click the plus **+** next to the HMIS Coordinated Entry project for which you are entering data



LHC	HMIS Provider ID	Coordinated Entry Project Name
Allegany County	1466	AC: Coordinated Entry (CE)
Cecil County	1621	CC: Coordinated Entry (CE)
Frederick County	1681	FC: Coordinated Entry (CE)
Garrett County	1465	GC: Coordinated Entry (CE)
Harford County	1437	HC: Coordinated Entry (CE)
Southern Maryland	1630	SM: Coordinated Entry (CE)
Washington County	319	WC: Coordinated Entry (CE)

Step 3.

- Enroll the client who is the **HoH** into the project selected above in Step 2

**** [CLICK HERE](#) for the correct HMIS workflow to enroll HoH into the CE project ****

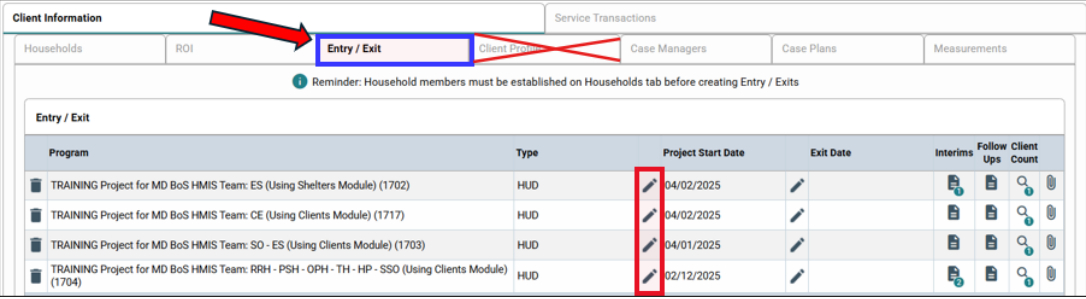
- Save & Exit the Entry assessment

✓ **After** enrolling the HoH into the HMIS CE project

➡ And from the Entry / Exit tab on the **HoH client record**

Step 4.

- Restrict the HMIS record based on option the client (HoH) selected on the 'Opt-Out' form
 - **Click** on the pencil for the project enrollment that is being restricted & open the **ENTRY** assessment



- Click on the 'Lock'

Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
(367738) HMIS, MD-514		04/01/2025						

Include Additional Household Members Showing 1-1 of 1

Entry Assessment

- Click 'Add Visibility Group'

Client

Warning: This client is shared by other providers. This client should not be restricted except in extreme circumstances.

Client (138) White, Betty Test
Date Updated 10/21/2024 03:10:01 PM
Visibility Updated 10/21/2024 03:10:01 PM

Visibility Groups Deny Groups

Group ID	Group Name	Group Type	Last Updated
0	Global	Public	10/21/2024

Add Visibility Group Showing 1-1 of 1

Exit

- Search for & Select the HMIS Coordinated Entry project you enrolled HoH into

LHC	HMIS Provider ID	Coordinated Entry Project Name
Allegany County	1466	AC: Coordinated Entry (CE)
Cecil County	1621	CC: Coordinated Entry (CE)
Frederick County	1681	FC: Coordinated Entry (CE)
Garrett County	1465	GC: Coordinated Entry (CE)
Harford County	1437	HC: Coordinated Entry (CE)
Southern Maryland	1630	SM: Coordinated Entry (CE)
Washington County	319	WC: Coordinated Entry (CE)

- **AND – Remove** the group called 'Global' by clicking the  icon

Visibility Groups Deny Groups

Group ID	Group Name	Group Type	Last Updated
0	Global	Public	07/24/2025
3468	TRAINING Project for MD BoS HMIS Team: CE (Using Clients Module) (1717)	Public	10/25/2025

Add Visibility Group Showing 1-2 of 2

Exit

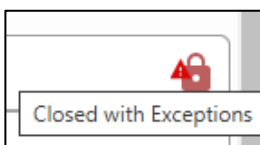
- The 'Lock' will now be **RED**

Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
(367738) HMIS, MD-514		04/01/2025						

Include Additional Household Members Showing 1-1 of 1

Entry Assessment

- When you hover over the 'Lock' it, it will say 'Closed with Exceptions'



Step 5.

- Go to the **ROI** tab
 - Click 'Add Release of Information'

Client - (367738) HMIS, MD-514

Release of Information: None

Switch to Another Household Member Submit

Client Information

Households ROI Entry / Exit Client Profile Case Managers Case Plans Measurements

Release of Information

Provider	Permission	Start Date	End Date
No matches.			

Add Release of Information Exit

- Provider:** This should be the HMIS CE project selected for 'Enter Data As' in Step 2
- Release Granted:** Select 'NO'
- Start Date:** Enter the date client signed the 'Opt-Out' form
- End Date:** Enter 01/01/2099 ****Change End Date** if the client decides in the future to ALLOW data sharing******
- Documentation:** Select 'Signed Statement from Client'
- Witness:** Enter your name
- Click 'Save Release of Information'

Release of Information

Release of Information - (367738) HMIS, MD-514

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.

☐ (107586) Single Adult Female

☒ (367738) HMIS, MD-514

☐ (371077) HMIS, MD-514 Child

Release of Information Data

Provider * TRAINING Project for MD BoS
HMIS Team: RRH - PSH - OPH -
TH - HP - SSO (Using Clients
Module) (1704) Search My Provider Clear

Release Granted * No

Start Date * 09 / 08 / 2025

End Date * / /

Documentation Signed Statement from Client

Witness ENTER YOUR NAME

Save Release of Information Cancel

Step 6.

- Go to the **Client Profile** tab

Client Information

Households ROI Entry / Exit Client Profile Case Managers Case Plans Measurements

- Under the **File Attachments** section
- Click 'Add New File Attachment'

File Attachments						
Date Added ▾	Name	Description	Type	Provider	Added From	
Add New File Attachment				No matches.		

- Upload the 'MD BoS HMIS Client Data Sharing Opt-Out Form' that has been ***signed / dated*** by the client & Partner Agency staff

Upload Attachment

Name *

Choose File No file chosen

Description

Upload

Cancel

Option 2: DENY Consent to Share with MD BoS HMIS Partner Agencies

!! End Users are **NEVER to restrict an HMIS client record from the Client Profile tab !!**

Step 1.

- Log into HMIS

Step 2.

- Click **Enter Data As** – then click the plus **+** next to the project for which you are entering data

The screenshot shows the 'Enter Data As Provider Search' window. At the top right, there is a button labeled 'Enter Data As'. Below it, there is a 'Provider Search' section with a search bar and a 'Search' button. Below that, there is a 'Provider Search Results' table. A red box highlights the 'Enter Data As' button, and a red arrow points to the plus sign next to the first row in the results table.

Provider	Level	Phone	Location	Last Updated
TRAINING Project for MD BoS HMIS Team: ES (Using Shelters Module) (1702)	Level 4	Unknown	Lexington Park, MD 20653	08/20/2025
TRAINING Project for MD BoS HMIS Team: ES (Using Shelters Module) (1702)	Level 4	Unknown	Lexington Park, MD 20653	04/29/2025
TRAINING Project for MD BoS HMIS Team: ES (Using Shelters Module) (1702)	Level 4	Unknown	Lexington Park, MD 20653	05/13/2025
TRAINING Project for MD BoS HMIS Team: ES (Using Shelters Module) (1702)	Level 4	Unknown	Lexington Park, MD 20653	05/07/2025
TRAINING Project for MD BoS HMIS Team: ES (Using Shelters Module) (1702)	Level 4	Unknown	Lexington Park, MD 20653	10/06/2025
TRAINING Project for MD BoS HMIS Team: ES (Using Shelters Module) (1702)	Level 4	Unknown	Lexington Park, MD 20653	09/09/2025

Step 3.

- **Enroll** the client who is the HoH, and all applicable HH members into the project selected above in Step 2
 - Save & Exit the Entry assessment once all HH members are properly enrolled

✓ **After** enrolling all HH members into the HMIS project

➡ And from the Entry / Exit tab on the **HoH client record**

Step 4.

- **Restrict** the HMIS record based on option client selected on the 'Opt-Out' form
 - **Click** on the pencil for the project enrollment that is being restricted & open the **ENTRY** assessment

The screenshot shows the 'Client Information' tab. The 'Entry / Exit' tab is selected, and a red box highlights the 'Entry / Exit' button. Below the tab, there is a table with columns: Program, Type, Project Start Date, Exit Date, Interims, Follow Ups, and Client Count. A red box highlights the 'Project Start Date' column.

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
TRAINING Project for MD BoS HMIS Team: ES (Using Shelters Module) (1702)	HUD	04/02/2025				
TRAINING Project for MD BoS HMIS Team: CE (Using Clients Module) (1717)	HUD	04/02/2025				
TRAINING Project for MD BoS HMIS Team: SO - ES (Using Clients Module) (1703)	HUD	04/01/2025				
TRAINING Project for MD BoS HMIS Team: RPH - PSH - OPH - TH - HP - SSO (Using Clients Module) (1704)	HUD	02/12/2025				

- **Click** on the 'Lock' for **each** household member included listed on the 'HMIS Client Data Sharing Opt-Out Form'

Household Members Associated with this Entry / Exit

Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
(367738) HMIS, MD-514		04/01/2025						

Include Additional Household Members

Showing 1-1 of 1

Entry Assessment

- Click 'Add Visibility Group'

Client Visibility

Client

Warning: This client is shared by other providers. This client should not be restricted except in extreme circumstances.

Client (138) White, Betty Test

Date Updated 10/21/2024 03:10:01 PM

Visibility Updated 10/21/2024 03:10:01 PM

Visibility Groups

Deny Groups

Group ID	Group Name	Group Type	Last Updated
0	Global	Public	10/21/2024

Add Visibility Group

Showing 1-1 of 1

Exit

- Search for & Select your agencies 'Agency Level 3 – Children Included' HMIS project

!! It is important the you add the 'Agency Level 3 – Children Included' !!
NOT only the project you are enrolling the client into – so that reports at the agency level will be accurate

- AND – Remove the group called 'Global' by clicking the  icon

Entry Exit Visibility

Entry Exit

Entry Exit (350863) HUD

Date Updated 06/04/2025 10:33:20 AM

Visibility Updated Never been set

Visibility Groups

Deny Groups

Group ID	Group Name	Group Type	Last Updated
0	Global	Public	03/28/2025
2056	MD BoS Projects Agency(1022) - Children Included	Public	10/25/2025

Add Visibility Group

Showing 1-2 of 2

Exit

- The 'Lock' will now be RED

Household Members Associated with this Entry / Exit

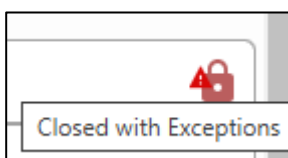
Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
(367738) HMIS, MD-514		04/01/2025						

Include Additional Household Members

Showing 1-1 of 1

Entry Assessment

- When you hover over the 'Lock' it, it will say 'Closed with Exceptions'



Step 5.

- Go to the **ROI** tab
 - Click 'Add Release of Information'

Client - (367738) HMIS, MD-514

Release of Information: None

Switch to Another Household Member: Submit

Client Information

Households ROI Entry / Exit Client Profile Case Managers Case Plans Measurements

Release of Information

Provider	Permission	Start Date	End Date
No matches.			

Add Release of Information

Exit

- Provider:** This should be the project selected for 'Enter Data As' in Step 2
- Release Granted:** Select 'NO'
- Start Date:** Enter the date client signed the 'Opt-Out' form
- End Date:** Enter 01/01/2099 ****Change End Date** if the client decides in the future to ALLOW data sharing******
- Documentation:** Select 'Signed Statement from Client'
- Witness:** Enter your name
- Click 'Save Release of Information'

Release of Information

Release of Information - (367738) HMIS, MD-514

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.

☐ (107586) Single Adult Female

☒ (367738) HMIS, MD-514

☐ (371077) HMIS, MD-514 Child

Release of Information Data

Provider * TRAINING Project for MD BoS
HMIS Team: RPH - PSH - OPH -
TH - HP - SSO (Using Clients
Module) (1704) Search My Provider Clear

Release Granted * No

Start Date * 09 / 08 / 2025

End Date * / /

Documentation Signed Statement from Client

Witness ENTER YOUR NAME

Save Release of Information Cancel

Step 6.

- Go to the **Client Profile** tab

Client Information

Households ROI Entry / Exit Client Profile Case Managers Case Plans Measurements

- Under the **File Attachments** section
- Click 'Add New File Attachment'

File Attachments						
Date Added ▾	Name	Description	Type	Provider	Added From	
Add New File Attachment				No matches.		

- Upload the 'MD BoS HMIS Client Data Sharing Opt-Out Form' that has been ***signed / dated*** by the client & Partner Agency staff

Upload Attachment

Name *

Choose File No file chosen

Description

Upload

Cancel

Option 3: DENY Consent to Share with MSHDW

!! End Users are **NEVER to restrict an HMIS client record from the Client Profile tab !!**

Step 1.

- Log into HMIS

Step 2.

- Click **Enter Data As** – then click the plus **+** next to the project for which you are entering data

The screenshot shows the 'Enter Data As Provider Search' window. At the top right, there is a button labeled 'Enter Data As'. Below it, a table lists search results for providers. The first row is highlighted, and a red arrow points to the plus sign next to it. The table has columns for Provider, Level, Phone, Location, and Last Updated.

Provider	Level	Phone	Location	Last Updated
TRAINING Project for MD BuS HMIS Team (25 (Using Clients Module) (1717))	Level 4	Unknown	Lexington Park, MD 20653	08/20/2025
TRAINING Project for MD BuS HMIS Team (25 (Using Clients Module) (1717))	Level 4	Unknown	Lexington Park, MD 20653	04/29/2025
TRAINING Project for MD BuS HMIS Team (25 (Using Clients Module) (1717))	Level 4	Unknown	Lexington Park, MD 20653	05/13/2025
TRAINING Project for MD BuS HMIS Team (25 (Using Clients Module) (1717))	Level 4	Unknown	Lexington Park, MD 20653	05/07/2025
TRAINING Project for MD BuS HMIS Team (25 (Using Clients Module) (1717))	Level 4	Unknown	Lexington Park, MD 20653	10/06/2025
TRAINING Project for MD BuS HMIS Team (25 (Using Clients Module) (1717))	Level 4	Unknown	Lexington Park, MD 20653	09/09/2025

Step 3.

- **Enroll** the client who is the HoH, and all applicable HH members into the project selected above in Step 2
 - Save & Exit the Entry assessment once all HH members are properly enrolled

Step 4.

- Go to the **ROI** tab
 - Click 'Add Release of Information'

The screenshot shows the 'Client - (367738) HMIS, MD-514' page. The 'ROI' tab is selected and highlighted with a blue box. Below the tabs, there is a section titled 'Release of Information' with a table that has columns for Provider, Permission, Start Date, and End Date. A red arrow points to the 'Add Release of Information' button.

Provider	Permission	Start Date	End Date
No matches.			

- **Provider:** **SWITCH** the provider shown here to project ID # **1729 - MD Data Warehouse ROI Opt-Out Provider**
- **Select ALL** of the HH members listed on the 'Opt-Out' form
- **Release Granted:** Select 'NO'
- **Start Date:** Enter the date client signed the 'Opt-Out' form
- **End Date:** Enter 01/01/2099
- **Documentation:** Select 'Signed Statement from Client'

- **Witness:** Enter your name
- **Click 'Save Release of Information'**

Step 6.

- Go to the **Client Profile** tab

- Under the **File Attachments** section
- **Click 'Add New File Attachment'**

- Upload the '**MD BoS HMIS Client Data Sharing Opt-Out Form**' that has been **signed / dated** by the client & Partner Agency staff

Talking to Clients about the MD BoS HMIS Privacy Policy

The HMIS Privacy Notice must be reviewed with **all clients** seeking services from your agency to provide information on their rights and HMIS policies related to personal data.

For clients *not* comfortable sharing their information, it is also important that you explain to them what the consequences could be for other Partner Agencies not to have access the information.

**** Below are generic scripts for both situations.**

Initial Client Meeting

I need to gather some information from you in order to determine what services you could be eligible for. Before we begin, let me explain how this information will be used.

- HUD, state, county, and local partners require that every agency receiving funds to serve those experiencing homelessness collect basic information from their clients using a computerized Homeless Management Information System (HMIS)
- This helps me, and my colleagues in the community, quickly determine all services that are available for you. The MD BoS HMIS is an “open” system, which means that:
 - Client data in the system is shared electronically between collaborating agencies, who must adhere to strict guidelines set in the MD BoS HMIS Policy & Procedures, as well as the MD BoS HMIS Privacy Policy; and
 - It can save you time should you need to access services from other agencies in the community that use HMIS. Since they will be able to view this information you are providing me – rather than starting from scratch, they will be able to simply verify & update your information as needed.
- If you would like additional detailed information about our communities Privacy Policy or how the data is used, you can ask for a copy of the Privacy Policy at any time

If a Client Does NOT Want to Share Their Information in HMIS

- I understand that you are not comfortable with your information being shared with other agencies in our community.
 - I want to assure you that you can still receive any services you are eligible for here at my agency; **however**
 - I will not be able to collaborate directly with other agencies in the community to see if you are also eligible for services that they may be able to offer you.
- Also, you would not be on our communities ‘By Name List’, which is the only way to be referred to a housing program (Rapid Re-Housing, Permanent Supportive Housing, etc.) when they have an opening.
 - Housing programs in our community can only accept clients into their program through a referral from the ‘By Name List’

Once you have explained this to the client, ask them if they would like you to:

- Keep fully sharing their HMIS information with other collaborating agencies
- If they do not wish to fully share their HMIS information, review the ‘*HMIS Client Data Sharing Opt-Out Form*’ with them & have them sign it