HMIS CHEAT SHEET - HOW TO DOCUMENT MPA DECLINES/REVOCATIONS

If a client is not willing to share their data in Clarity/HMIS, it is important both to collect documentation of those wishes and document them in Clarity appropriately before emailing HMIS Support to request the Clarity record be secured. When a client informs you they do not wish to share data, please complete the following steps:

1. Collect paper copy of the client's decline to share data or their revocation of authorization to share data.
2. Document the client's wishes in Clarity
3. Email Support@rtfhsd.org for next steps

Collect Client's Decline to Share or Revocation of Authorization to Share On Paper

It is not currently possible to document a client's decline or revocation of authorization to share electronically in Clarity, so please be sure to document this by having the client fill out a paper form - either the MPA form (if declining) or the Revocation form.

Decline via the MPA Form

- **WHAT:** Client signs the ***Multiparty Authorization to Use and/or Disclose Information***.
- ***WHEN: Use this method if this is the first time a client is signing the MPA.***

  Check whether it's the first MPA or not by reviewing the client's ROI area in Clarity for other records.
- **HOW:** Client should still sign the MPA form and provide their information, then document their decline by checking the box next to the statement, "*I do not wish to share information with any organizations.*"

Signature of Individual or Legal Representative

Client Signature ______ Client Name ______ Date ______

If signed by Legal Representative, Relationship to Individual

I do not wish to share information with any organizations: ☐

Revocation of Authorization via Revocation Form

- **WHAT:** Client signs the ***Revocation of Authorization to Release Information***.
- **WHEN:** ***Use this method if you are aware that the client has previously signed an MPA agreeing to share data.*** By signing the Revocation form, they will revoke prior authorizations. Check for other MPA's in the client's ROI area in Clarity.
- **HOW:** Client should fill out and sign the Revocation of Authorization to Release Information form.

San Diego County CoC Homeless Management Information System (HMIS)
Client Revocation of Authorization to Release Information

I, ______________________, hereby revoke permission for this agency to share my personal information in the San Diego County CoC Homeless Management Information System (HMIS). I understand that my information will remain in HMIS as part of the non-identifying data collected on homeless services provided by the San Diego County Continuum of Care (CoC).

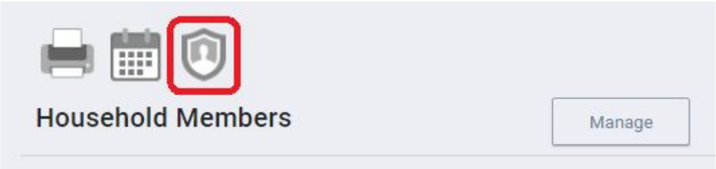
If your client declined and you later notice previous MPA records, document the decline following the instructions in the rest of this document. When you email HMIS Support, note the previous MPA's; the Support team will advise you on next steps.

Document the Client's Data Sharing Wishes in their Clarity Record

Properly document the wishes you collected from your client regarding sharing their data in HMIS by both documenting their response in the ROI area of their record and uploading the paper document the client signed as a PDF file in the client Files tab.

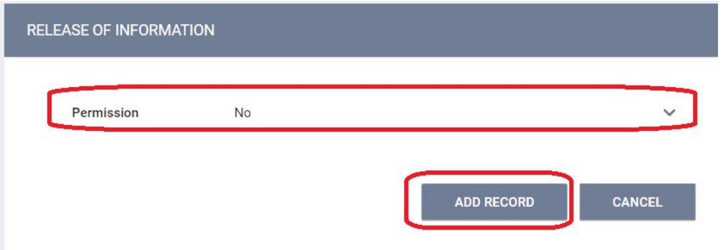
Add an ROI Entry with Permission = "No"

1. Navigate to the Privacy/ROI area of the client record by clicking on the Privacy Shield icon on the far right side of the Client Profile.



2. From within the Privacy area of the client record, click on the "Add Release of Information" button located on the right side of the Release of Information header.

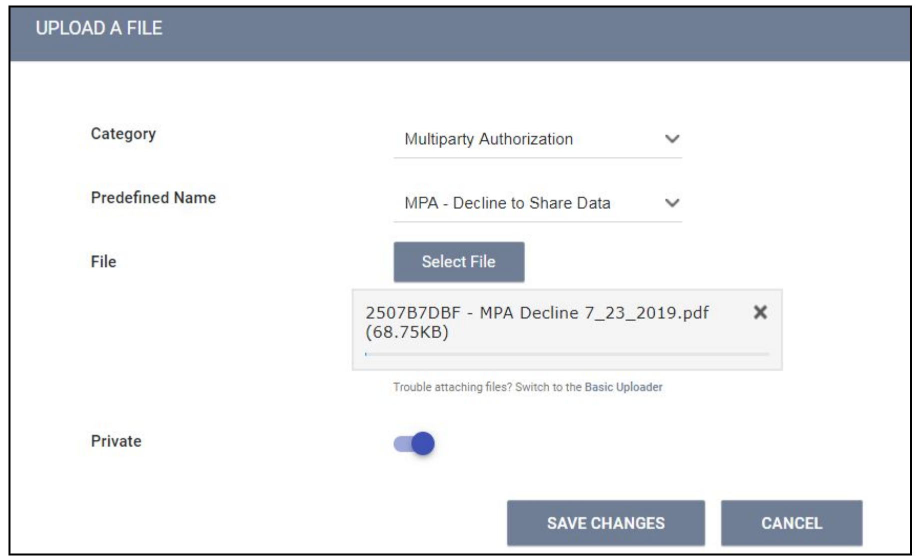
3. Change the Permission field selection to "No".
4. Click on the "Add Record" button.



Upload a Scanned PDF of the Signed MPA or Revocation Document in the Files Tab in Clarity

1. Scan the paper copy of the MPA form which the client signed and checked the decline checkbox on in order to decline to share or the revocation form that the client signed to revoke authorization to share. Save the scanned file using the following format for filename:
    a. Filename for decline via MPA: "[Client unique identifier] - MPA Decline - [Date]". For example - “871B38D9 - MPA Decline - 7_30_2019”.
    b. Filename for revocation via revocation form: "[Client unique identifier] - MPA Revocation - [Date]". For example - “871B38D9 - MPA Revocation - 7_30_2019”.
2. Navigate to the Files tab of the Clarity client record. From there, click on the “Add File” button on the far right of the header.

3. From the “Upload File” screen, make the following selections:
    a. *Category:* Multiparty Authorization
    b. *Predefined Name:* Select whatever is most appropriate to the document - either "MPA - Decline to Share Data" or "MPA - Revocation of Authorization to Share Data".
    c. *File:* Select the file containing the client's Decline or Revocation form.
    d. *Private:* Toggle the Private button on.
    e. Click "Save Changes"
4. After you have uploaded the file successfully, delete it from your computer immediately.



Email HMIS Support to Request that RTFH Secure the Record in Clarity

After you have successfully documented the client’s data sharing wishes in Clarity, email the HMIS Support Team to request that the client’s record in Clarity be restricted due to their wishes not to share data. Support will advise on next steps, restrict the record and confirm for you when it is secure.