



**MOU - AGENCY MASTER AGREEMENT**  
**Heartland Continuum of Care (HCoC)**  
**Homeless Management Information System (HMIS)**

**FY 2024-2025**

The Heartland Continuum of Care (HCoC), in accordance with the US Department of Housing and Urban Development data collection mandates, participates in an HMIS system to serve its data collection and reporting requirements. Please review each section. **Then, initial each point to indicate your understanding of, and agreement to, the terms and conditions of your participation in the HMIS system. Sign last page please.**

**Section I: Software Selection and Governance**

- The HMIS system is Community Services (formerly Servicepoint), an Internet-based Homeless Management Information System developed by Bowman Internet Systems (BIS), a Wellsky company based in Lenexa, Kansas, for the purpose of client tracking and case management for HUD and Non-HUD funded services provided through the agency.
- To govern Community Services, the HCoC has chosen to implement the “HMIS Lead Organization” Governance Structure. Where the HCoC provides oversight, it shall be so indicated.
- M.E.R.C.Y. Communities (MERCY) serves as the HMIS lead Agency for the HCoC, and holds the umbrella contract with Wellsky Companies, as well as secures individual licenses for participating Agencies.
- MERCY is responsible for ensuring that the terms of the agreement with Wellsky continue to be satisfied so that all agency data remains secure. Wellsky handles the provision of disaster recovery services, daily backup of data, system maintenance and regularly scheduled product upgrades. MERCY trains and administers policies and procedures designed to protect database level security via login/password maintenance.

**Section II: Password Protection-User Responsibility and Ethics Statements**

- HMIS Users Unique User ID and Password gives them access to the HCoC HMIS.
- HCoC HMIS Users will treat clients and partner agencies with respect, fairness and in good faith, and maintain high standards of professional conduct in their capacity as an HCoC HMIS User. Failure to uphold the standards of the HCoC HMIS is grounds for immediate termination from the HCoC HMIS and may result in personnel action.
- All HMIS users at this agency have been trained on how to access and use the HCoC HMIS system and will abide by the security protocols as provided to me during said training.
- User ID’s and Passwords are for the individuals use only and must not be shared with anyone including Agency Administrator, and Executives or any co-workers.**
- All Users will take reasonable means to keep their passwords physically secure.
- A computer that has the HCoC HMIS open and running should never be left unattended. Failure to log off the HCoC HMIS appropriately may result in a breach of client confidentiality and/or system security. Therefore, all users will log off of the HCoC HMIS each time use is completed.
- Hard copies of client information printed from the HCoC HMIS must be kept in a secure file. When hard copies are no longer needed, they must be properly destroyed to maintain confidentiality.
- Electronic files exported from the HCoC HMIS must be password protected to maintain confidentiality.

### Section III: Operations and Compliance

- MERCY provides set-up, training and ongoing support to HCoC participating agencies.
- Further technical support as needed is provided by Wellsky's secured support network called Wellsky Portal. As the lead agency, MERCY works directly with Wellsky on behalf of the HCoC participating agencies through this system for all issue tracking, and participating agencies are **not** authorized to contact Wellsky directly. Additions, enhancement requests and changes must be channeled through MERCY as the HMIS lead agency.
- Participating agencies will operate in accordance with HUD's published HMIS Data and Technical Standards, as published and regularly updated at this link.  
<https://www.hudexchange.info/resources/documents/HMIS-Data-Dictionary.pdf> (2022 data standards)  
<https://www.hudexchange.info/programs/hmis/hmis-data-standards/> (interactive data dictionary)  
<https://files.hudexchange.info/resources/documents/HMIS-Data-Dictionary-2024.pdf> (2024 data standards as of Oct 2024)
- Participating agencies will comply with all HCoC HMIS operating procedures, as provided in the HMIS Policies and Procedures Manual. And, further agrees to monitor its users for adherence to security and privacy policies.
- The HCoC has the right to terminate this agreement at any time if the standard operating procedures are not followed.
- A feedback mechanism regarding Lead Agency performance or HMIS Administrator performance is in place through monthly meetings of the HCoC and Heartland Housed. Either openly in meetings or directly through President or Executive Director.

### Section IV: Data Quality, Data Sharing and Data Release

- Data Quality Standards are set at the highest level that may be achieved. These comply with the HUD specifications, which are monitored on a monthly, quarterly and annual basis. MERCY, as the lead Agency, shall run the following reports for ensuring compliance with Data Quality Standards, and distribute to each participant Agency:
  - Duplicate Clients Report (Done internally-emails sent only for errors)
  - Data Incongruity Locator Reports (Done internally-emails sent only for errors)
  - Data Completeness Report Card
  - Data Quality Framework (Done internally-emails sent only for errors)
  - Project Descriptor Elements Data Quality (Done internally-emails sent only for errors)
  - Project Inventory accuracy (Done internally-emails sent only for errors)
- Other Data Reports that are produced for the CoC:
  - Project Utilization rates (shared Google Docs) Monthly.
  - Coordinated Entry/Outreach client report for case conferencing (shared Google Docs) Bi-weekly.
  - Full HMIS dataset of all clients in Community Services (NO PPI is ever given) directly to the Office of Planning and Economic Development. Monthly.
  - United Way dataset of all clients in Community Services for the Red Feather Grant (NO PPI is ever shared). Quarterly and annually.
  - Annual Housing Inventory Count and Point in Time count data is uploaded directly to HUDHDX.info
  - Annual System Performance Measures is uploaded directly to HUDHDX.info
  - Annual Longitudinal System Analysis is uploaded directly to HUDHDX2.info

- Quarterly IDHS ESG program client demographic data is emailed to grant managers on behalf of all ESG grant recipients (including ESG-CV grants)
- Annual IDHS ESG reports uploaded directly to SAGEhmis.info which is passed thru IDHS to HUD
- Data Dashboards utilized through Heartland Housed and presented in forums as Heartland Housed deems required. This could be on the Heartland Housed website, Sangamon County website, City of Springfield website or any presentations to benefit Heartland Continuum of Care.
- The Heartland HOUSED Strategy Board and Heartland Continuum of Care Board of directors will review data necessary to make funding decisions and continuously update our local strategy to address homelessness.

**None of the above reports EVER present any identifying client information except for the Coordinated Entry case conferencing upload. However, you must have signed a confidentiality agreement to be present or have access to these documents.**

- A HUD initiative called “Data Quality Management Plans (DQMP)” will be provided to all agencies who enter data into the HMIS and they are used to provide actionable, measureable steps to address data quality within the HMIS. This ensures accurate reporting and contributes to the overall picture of homelessness within the CoC area. These DQMP’s will be issued to each agency starting on a quarterly basis and progressing based on data quality presented. “This has not been implemented to date but is expected prior to January 1<sup>st</sup>, 2024”
- This DQMP will be used in conjunction with a searchable dashboard accessible to the public presented on the Heartland Housed website which shows data quality along with other project level non-identifiable client data of inflow and outflow, household makeup, veteran status, chronic homeless status and demographics. The types of data shared may change over time but will never reveal any identifiable client information. The data dashboards may also be used in the rating and rankings processes by any said committees along with any new data presentations approved by the Heartland Continuum of Care board or the Heartland Housed Board. “This has not been implemented to date but is expected prior to January 1<sup>st</sup>, 2024”
- Data Sharing – Per agreement of the HCoC participating Agencies, the following data sharing occurs between agencies unless specifically denied by clients utilizing the Release of Information forms: Client Name, Social Security Number, DOB, Gender, Race, Ethnicity, Type of Household, Entry/Exit data, Identifying or historical information, Housing information, Income Information, Legal history/information, Medical information, health insurance and needs, services, provided and referrals and the outcomes of such of all members of the client’s household.  
Also included in sharing will be any assessments agreed upon for use in compliance with Coordinated Assessment but not limited to these. Unnamed and anonymous clients are exempt from name sharing in the system. Outreach projects are also allowed sharing access of client notes to communicate client information that benefits the client with services and community connections, needs assessment and contact information
- The information listed in the HMIS can only be accessed by the HCoC Participating authorized HMIS users. This ensures that the HCoC is not duplicating individuals or services and also provides a better understanding of the service usage within the HCoC.
- No agency shall allow outside entities to view or allow access to this data including police officers, officers of the courts, City of Springfield, County of Sangamon or State of Illinois employees EXCEPT during audit processes and/or if they are funding any projects in their name. Federal regulations FR4848-N-02 Vol 69 section 4.1.3 Pages 45928 and 45929 set forth in the Federal register dictates what is allowable HMIS uses and disclosures of Personally Protected Information where required by law and for law enforcement purposes. A copy of these regulations is available to any person or agency upon request.  
In the event of a requested data release for specific funding opportunities, pilot programs or research grants, each client that has agreed to these programs, MUST sign a customized Release of Information specifying what information is going to be shared, who it will be shared with and for how long will this information be

shared. This should always be uploaded into Community Services via the Client Profile tab under uploads. This will NOT be uploaded to the ROI tab. Please contact the HMIS Administrator to verify the legitimacy of request and for a custom release to be created.

- Data Release – Requests of Data shall only be honored from authorized individuals in participating Agencies. MERCY shall never provide your data or reports to any outside entity unless written consent is received. MERCY shall take the position that each Agency has the authority to release their own information consistent with their privacy policies. Generally, an Agency’s aggregate data and reports would be for purposes of obtaining or reporting on grants. Individual client data should only be released with specific client consent to provide information to a named recipient.

#### **Section V: Policy Development and Oversight**

- Client Confidentiality and Privacy Training is provided upon initial set-up with a new user. User ensures that client confidentiality and data privacy is maintained at their agency. If a suspected breach has occurred, agency agrees to contact the lead agency immediately.
- Community Planning Goals and Objectives are provided through the Strategic Plan of the HCoC, which the HMIS supports.
- Best Practices are provided at the initial training and set-up. As new information or upgrades occur, the Lead Agency shall distribute to all participants via System News dashboard in Community Services, in-person or Zoom trainings or the heartlandhmis.talentlms.com training site (to be released 2023)
- All agencies must post notice in a highly visible location, informing possible clients of our data storage requirements. The currently acceptable HUD approved notice states; “We collect personal information directly from you for reasons that are discussed in our privacy release. We may be required to collect some personal information by law or by organizations that provide us funding to operate this/these programs, to improve services for homeless persons, and to better understand the needs of those persons. We collect only info that we consider to be appropriate.”
- MERCY Communities maintains the documents of agreements at its’ main headquarters in Springfield, IL.
- MERCY ensures that Wellsky maintains the existence of HMIS Security Policy, HMIS Privacy Policy and Use documentation. MERCY is also available during normal business hours to answer questions, provide interpretation or support, and to be available to participating Agencies in a timely manner to maintain the highest level of HMIS support possible to all participants
- Each participating Agency must have Client Consent protocol to guide its data collection efforts. By initialing, you assert that you have such consent forms in place, are visible to all clients at your Agency and can provide upon notice.

The signing of this Master Service Letter of Agreement certifies understanding and concurrence with the terms and conditions of the Heartland Continuum of Care's HMIS System.

AGENCY: \_\_\_\_\_

Signature of Executive Director: \_\_\_\_\_ Date: \_\_\_\_\_

HCoC - HMIS Lead Agency: M.E.R.C.Y. Communities, Inc. Amy Voils, Executive Director

Signature: *Amy Voils* Date: July 1<sup>st</sup>, 2024

Tracie Cunningham, HMIS Administrator

Signature: *Tracie Cunningham* Date: July 1<sup>st</sup>, 2024

**RETURN SIGNED AGREEMENT TO:  
MERCY Communities  
1344 N. 5th Street  
Springfield, IL 62702  
(217) 753-1358**