HMIS User Account Procedures

Review Date: January 16, 2024

Purpose: Written standards to guide HMIS account creation, deactivation, and deletion for a variety of scenarios**.**

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Account Creation:

A. Traditional New User

- Traditional new users are the most common reason for new HMIS account creation and encompass new employees in an agency or existing employees new to HMIS.
- Traditional new users must complete New User Training applicable to their role[1].
- Users must complete End User Agreement and HIPAA Training Acknowledgment forms.

B. Existing User- Different Primary Project
- To change a user's primary project, the account must be deleted and recreated under the new primary project by an HMIS administrator.
- Applies to users changing primary projects within the same agency.
- Applies to users changing primary project to a project in a different agency.
- If primary projects are *different program types*, user must attend new user training and complete all new user paperwork (User Agreement and HIPAA Training Acknowledgment Forms)
  - **Example:** User used to work for Agency A, Street Outreach and is now working for Agency A, Permanent Housing
  - **Example:** User used to work for Agency A, Emergency Shelter and is not working for Agency B, Rapid Re-Housing
- If primary projects are *the same program type*, refer to table below:

User Experience	Gap Time Between Positions	User Agreement Form	HIPAA Training Acknowledgment Form	New User Training
User has been in previous role for < 1yr	≤ 2 weeks	X		
User has been in previous role for < 1yr	> 2 weeks	X	X	X
User has been in previous role for ≥ 1yr	≤ 1 month	X		
User has been in previous role for ≥ 1yr	> 1 month	X	X	X

  - **Example:** User worked for Agency A, Emergency Shelter for 6 months and is now working for Agency B, Emergency Shelter. User had one week between positions. User must complete User Agreement Form
  - **Example:** User worked for Agency A, Emergency Shelter for 6 months and is now working for Agency B, Emergency Shelter. User had three weeks between positions. User must complete new user training and all new user paperwork.

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[1] End User 1 Training: SSO, SO   End User 2 Training: ES, TH, SH   End User 3 Training: PH, PSH, RRH

- o **Example:** User worked for Agency A, Permanent Housing for 1.5 years and is now working for Agency B, Permanent Housing. User had three weeks between positions. User must complete User Agreement Form.
- o **Example:** User worked for Agency A, Permanent Housing for 1.5 years and is now working for Agency B, Permanent Housing. User had 2 months between positions. User must complete new user training and all new user paperwork.

C. **Existing User- Multiple Project Types or Agencies**
- Applies to existing HMIS user who requests access to an additional project that is a different project type than their existing access.
- User must complete new user training and user agreement form for requested new project.
  - o **Example:** User currently works for Agency A, Permanent Housing and procured additional employment for Agency A, Emergency Shelter. User must complete new user training for ES and complete user agreement form.
  - o **Example:** User currently works for Agency A, Permanent Housing and procured additional employment for Agency B, Emergency Shelter. User must complete new user training for ES and complete user agreement form.

Account Deactivation:

A. **IT Procedures**
- If a user has not signed into their account for more than 90 days, Montgomery County IT Department will deactivate the account.
- Account still exists in the system but is labeled as "inactive."

B. **Requirements for account reactivation**
- Users who wish to have their inactive account reactivated must attend new user training.
- No paperwork is needed.
- If user requests to have account reactivated but under a different primary project, user is considered a Traditional New User. Refer to Account Creation: Traditional New User.

Account Deletion:

A. **User No Longer Works for Agency**
- Agency Admins are responsible for alerting HMIS Administrators of users who no longer work for their agency within 48 hours of user leaving agency.
- User accounts will be deleted.
- When a user account is deleted, all clients/notes/assessments user put into the system will remain in the system.