

HMIS Self-Assessment Survey

Description: *This survey is filled out by the agency in advance of a site visit by the lead agency and gives a comprehensive picture of the agency's compliance with HMIS privacy, data entry, training, and participation guidelines*

The *Self Assessment Survey* is a new tool, developed to assist in the Homeless Management Information System process. The purpose of the survey is:

- to highlight standard issues noted and discussed during the site visit interviews, and
- to prepare the agency and its users for the site visit.

Instructions for completing the Survey

- One or more agency staff should complete the written survey.
- **Agency administrator and at least one agency staff should be involved in the self-assessment survey process.** Those items that are tagged “Needs Work”, “No”, or “N/A” should be highlighted and details shared as needed. Responses will provide a basis for dialogue during the interviews at the site visit.
- The agency may provide additional information regarding one or more responses, but this is **not** an expectation. Such information may be given orally during the site visit.

Responses to each statement and definitions are as follows:

Yes — The agency has completed and can demonstrate that all criteria related to this statement are met.

Needs Work — Some work has been done related to this statement, but not all criteria are met.

No — None of the criteria stated are met.

N/A — Statement is not applicable to the agency.

Self Assessment Survey

Completed for:

Agency Name

The following survey information was completed by one or more agency representatives and discussed by agency staff.

By: _____ Date: _____
Agency Representative

By: _____ Date: _____
Agency Representative

HMIS Self-Assessment Survey
Agency and Client Related Activities

Assessment Criteria	Yes	Needs Work	No	N/A
1. The agency has obtained signed HMIS Client Release of Information Forms and they are housed in a secure location.				
2. The agency has obtained completed Client Intake forms for data entry/updating.				
3. The agency clearly displays Client Privacy Rights and HMIS Client Notice.				
4. The agency uses HMIS data for reporting purposes while maintaining client confidentiality.				
5. The agency ensures that all signed forms are locked in a designated location with limited access to staff.				
6. The agency enters Client Basic Demographic Data into the HMIS system as close to real time as possible and no later than one week of intake/service.				
7. The agency ensures that all homeless residential clients are entered into the system using the HUD 40118 Entry/Exit.				
8. The agency has ensured that each HMIS user within its agency has signed a user agreement stating full understanding of user rules, protocols and confidentiality.				
9. The agency has assigned an AHMIS Agency Administrator to monitor data entry and to insure overall system requirements are met.				
10. The agency has updated anti-virus and firewall protection on all computers used to access the HMIS database.				
11. The agency understands the importance of reporting AHMIS users immediately when/if employment for agency ends.				