

**MONTGOMERY COUNTY  
DEPARTMENT OF HEALTH AND HUMAN SERVICES (MCDHHS)  
CONTINUUM OF CARE  
HOMELESSNESS MANAGEMENT INFORMATION SYSTEM (HMIS)  
CLIENT DELETE REQUEST POLICY**

The purging of a client from HMIS may occur in one of two ways:

1. Deletion: The client record is marked as “inactive” removing the client from all stock reports as well as the client search population, but the client remains in the database and their information can be accessed through custom reports generated in Report Writer or in the Business Objects Advanced Reporting Tool (ART).

2. Removal: The client record is completely taken out of the database by the software vendor and is no longer accessible or restorable.

**REASONS FOR POLICY:**

1. As the HMIS ADMINISTRATOR implementation goes forward situations may arise that necessitate the purging of a client and his/her information from the HMIS ADMINISTRATOR database. These reasons include:

- a. For added security when a client is in danger.
- b. To correct an accidental duplicate entry and other data entry errors.
- c. In response to a client request.

2. Since multiple providers may be involved in the use and updating of a single client record, it is necessary that the deletion/removal of a client record be coordinated so that one provider does not inadvertently delete/remove the data of another provider.

**STATEMENT OF POLICY:**

1. The safety and well being of the client will supersede other considerations in all decisions regarding the deletion/removal of client records from the HMIS database.
2. Except for reasons of client safety and the proper correction of data entry errors, the deletion or removal of client records from the database is discouraged.
3. When deletion or removal is deemed necessary, every effort will be made to identify, notify, and consult with affected providers prior to the deletion/removal.

**PROCEDURE:**

1. For correction of duplicate client entry and other data entry errors.  
a. When purging for error correction, the deletion method (as opposed to removal) will be utilized in all situations.

b. If after creating a new client, a user discovers that the client already existed in the database, the user should notify the HMIS Administrator. In situations where the duplicate entry is discovered after a long period of time (over 30 days), and after entry of assessment data into the duplicate entry, the user should consult with the HMIS Administrator to determine which other providers have edited the record and how the error can best be corrected. In general, for this type of error, deletion should be used only when the error cannot be effectively and practically corrected by editing or other correction methods.

2. When a client is in danger.

a. There are several functionalities built into ServicePoint to provide additional security for clients who are in danger of physical attack or abuse. These include the unnamed

client feature, closing the client profile, and the anonymous functionality all of which are available and are preferable to deleting/removing the client record.

b. In extreme cases however, and where a client comes into danger after significant data has been entered, it is sometimes necessary to delete or remove the client from the database for their protection.

c. Any decision to delete/remove for security/safety reasons should be made in consultation with the DHHS HMIS Contract Monitor(s).

d. When a client is purged for security/safety reasons, the HMIS Administrator will identify and notify any/all provider(s) that are affected.

### 3. Removal at the requests of the client.

a. In general, client requests for having their record deleted or removed should be discouraged unless for valid reasons of safety/security.

b. Deletion/removal at the request of a client may result in an inability for that client to receive future services.

c. When a client requests deletion/removal for invalid reasons, they should be presented with the option of closing the client profile as a viable alternative.

d. Any decision to purge the record at a client's request should be made in consultation with the System Admin I and with the HMIS Administrator.

e. When a client is deleted or removed at a client's request, the HMIS Administrator will identify and notify any/all provider(s) affected.

f. In cases where removal is provided for invalid reasons, HMIS Administrator reserves the right to pass on the costs associated with such removal.

***Revised 01/22/2007***

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DEPARTMENT OF HEALTH AND HUMAN SERVICES (MCDHHS)  
CONTINUUM OF CARE  
HOMELESSNESS MANAGEMENT INFORMATION SYSTEM (HMIS)  
CLIENT DELETE REQUEST FORM**

**Please complete the following:**

**Employee Name:** \_\_\_\_\_  
(Please print clearly.)

**Email Address:** \_\_\_\_\_  
(Please print clearly.)

**Agency Name:** \_\_\_\_\_  
(Please print clearly.)

**Provider Name:** \_\_\_\_\_  
(Please print clearly.)

Data of the duplicate client record to be deleted/inactivated...				Data of the client record to be merged into...			
Client ID #	Client Name	Client DOB	Client SSN	Client ID #	Client Name	Client DOB	Client SSN
1.							
2.							
3.							
4.							
5.							

**Important**

If you have any questions regarding the completion of this request, please contact the County's Helpdesk at 240-777-2828 or send an email to [HelpIT@MontgomeryCountyMD.gov](mailto:HelpIT@MontgomeryCountyMD.gov).

After filling out this form, please attach in an email and send to [HelpIT@MontgomeryCountyMD.gov](mailto:HelpIT@MontgomeryCountyMD.gov).