Sample Director's Memo

TO: All Staff
FROM: Max Smedley, Program Director
DATE: 9/14/05
RE: HMIS Data Processes and Quality Procedures

In order for us to benefit from entering data into the HMIS, it is important that we make sure that we are entering all information accurately and completely. This information is critical for us to understand the people we serve and to make our case to funders.

To ensure quality data, our agency has adopted the following policy on data quality:

- Information (with particular emphasis on the minimally required fields) should be entered in the HMIS for all clients, unless the client refuses.
- Overall for the agency, no minimally required data field should have missing information for more than 5% of records.
- Data should be entered into the databases within 48 hours of every client intake or service encounter.
- All active clients should be reviewed by the 5th of every month to ensure their data is still timely.
- Data intake staff should randomly spot check at least 5 of their clients every other week in the HMIS against the paper to ensure that information was entered accurately.
- All questions about the data should be entered in the data quality log. After entering a new question, the staff member to whom the question is addressed should be alerted by email. Responses to queries in the quality log should be made within 2 business days. The data quality log will be reviewed at each weekly case manager meeting.
- We will use client reports generated from the HMIS, rather than paper files when reviewing case files in weekly case manager meetings.
- Data quality will be added as an agenda item in our weekly staff meetings.
- Data quality goals will be added to the performance review criteria for all relevant staff.

The following processes will ensure that data are not missed.

- **New** client forms should be placed in the data entry inbox. After data entry, data entry staff should file the client form,
- Information about **returning** clients or **updated** information about current clients should be recorded on the **blue** update forms, these should be clipped to the top of the client file and the whole file should be placed in the data entry inbox.
- Client **exit** information should be entered by the client case manager.

All staff HMIS users will be expected to implement these policies, as relevant to your position. If you have any questions or concerns about these procedures, please contact me.