Deceased Client Data Policy

January 2024

Alameda County Continuum of Care Deceased Client Data Policy

Purpose: To advise CoC participating agencies on the process for confirming the death of a client and updating their record in the shared Homelessness Management Information System (HMIS). This policy is not intended to supplant existing agency policies but rather to be supplemental in providing specific instruction on Homeless Management Information System data entry when a client is deceased.

This Deceased Client Data Policy provides guidance to Alameda County HMIS-participating agencies who serve the homeless and at-risk of homelessness populations. There are various scenarios service providers may encounter with respect to the death of a client.

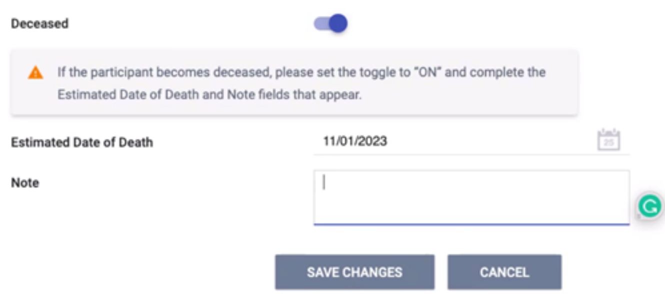
Confirmation of Death and HMIS Data Management Policy: When an HMIS-participating agency is made aware of a client's death, partner agencies should follow this series of steps:

1. Update the Client Profile Page with deceased information.
2. Exit the client from all active program enrollments, for your agency in HMIS via the instructions below. If the client was recently referred to a program with your agency, deny their referral and exit the client from the Coordinated Entry Program.
    a. If the client is actively enrolled in multiple programs, submit to ticket to HMISsupport@achmis.org to have the additional programs exited.
3. Enter a public alert into HMIS to inform other partner agencies within the CoC that the client has passed away and the date they passed away.

It is important that community coordination continues once someone engaged in the homelessness response system has passed away. By closing out their HMIS program enrollments or referrals, and posting a public alert, we can effectively inform all providers who may have been in touch with a client – including those who may not have been engaged with the client at their time of death. People experiencing homelessness in our community are often engaged with multiple providers at various points in time and the HMIS public alert system ensures that appropriate parties are informed and empowered to update client records accurately.

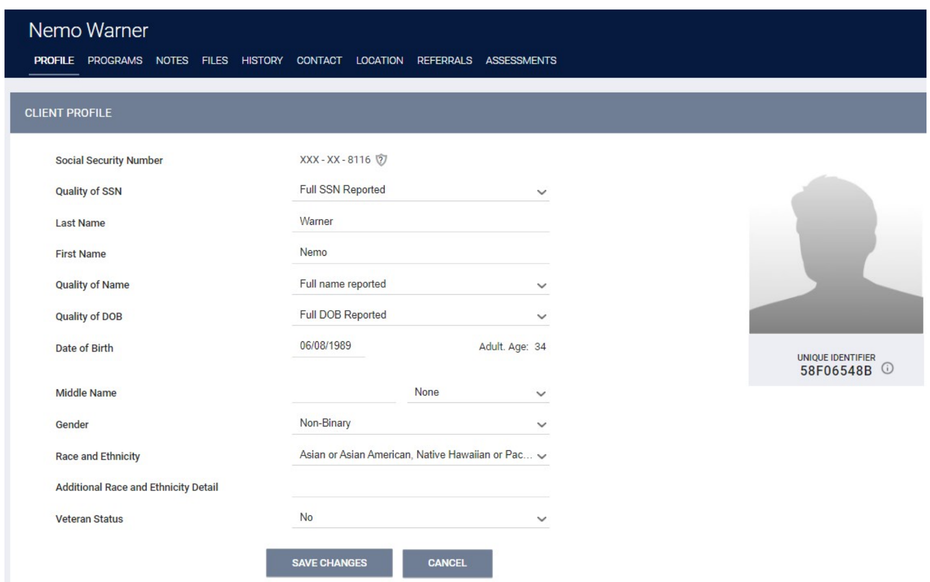
Steps for setting a Deceased client in HMIS:

A. Navigate to the client's HMIS profile from the homepage using their name or unique ID number.
B. From the client's HMIS profile page, Select the "Deceased" toggle.
    a. Enter the Estimate Date of Death
    b. Enter Note if applicable.

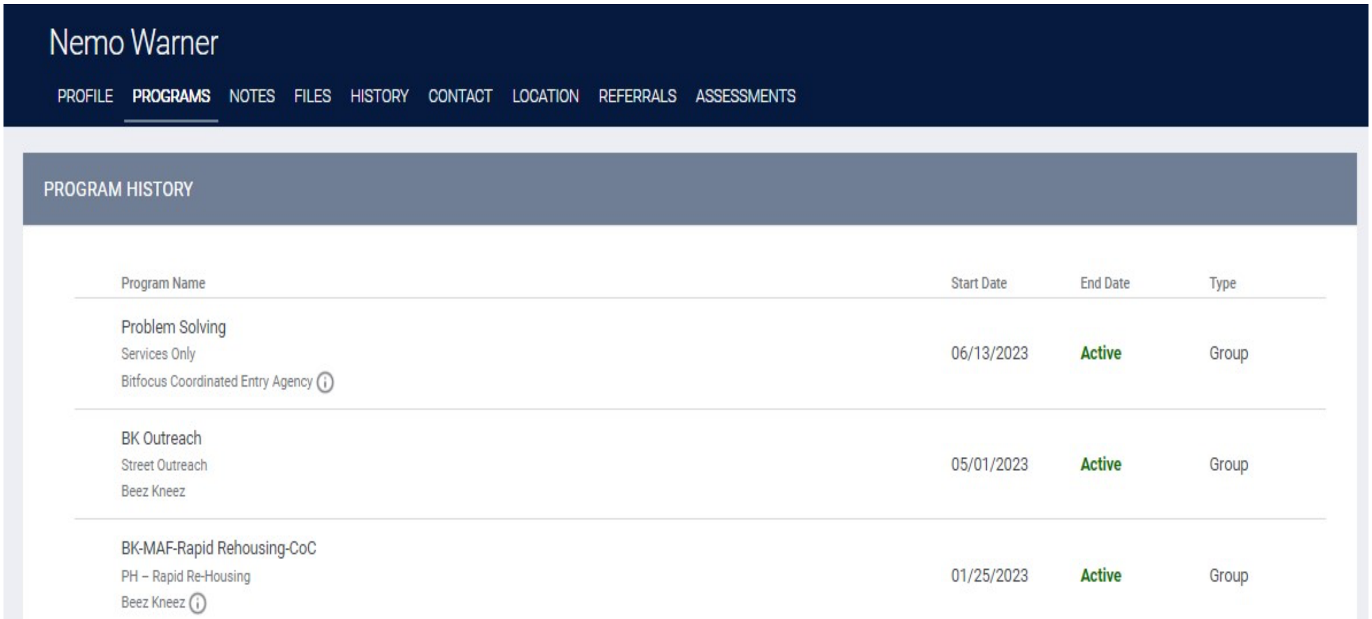


Steps for Exiting a Deceased Client from Active Programs in HMIS:

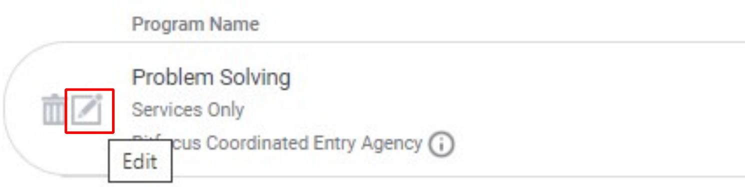
A. Navigate to the client's HMIS profile from the homepage using their name or unique ID number.



B. From the client's HMIS profile page, navigate to the "Programs" tab of HMIS and identify all active program enrollments.

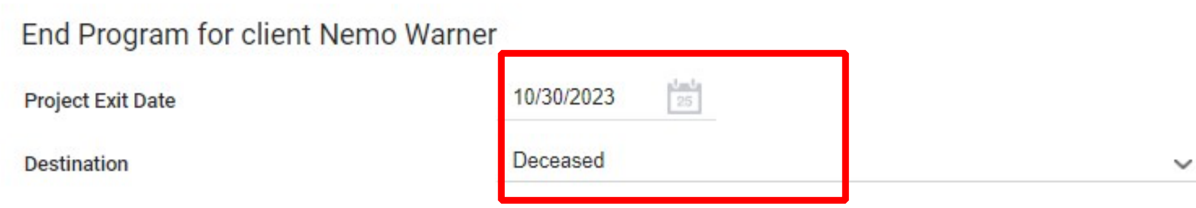


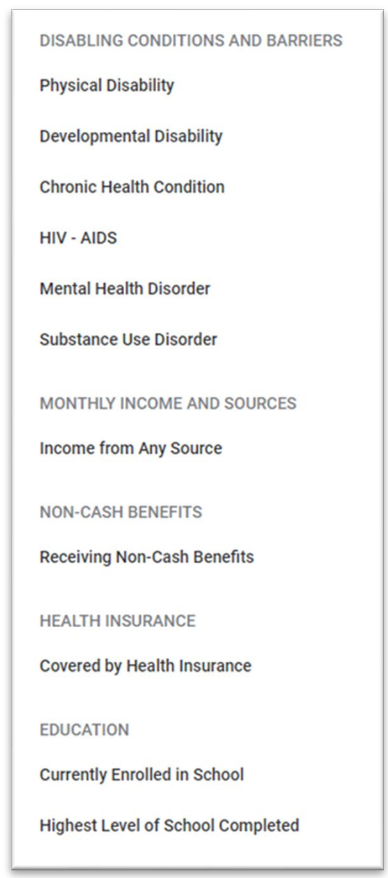
C. For active program enrollments offered by your agency, complete the standard program/ project exit process by selecting the edit/ pencil icon next to their program enrollment.



D. When you click the edit icon, you'll be directed to the client's History page, Navigate to the client Exit page by selecting the "X Exit" tab from the program-level navigation bar.

E. From the Exit page, enter in all available client details. List the "Program Exit Date" as the date of death, if known. Enter their "Exit Destination" as "Deceased," and "Housing Assessment at Exit" (if it appears) to "Client Died." Last, enter in all income, non-cash benefit sources, and health insurance details as known prior to the client's date of death. Be sure to hit "Save Changes" once complete.

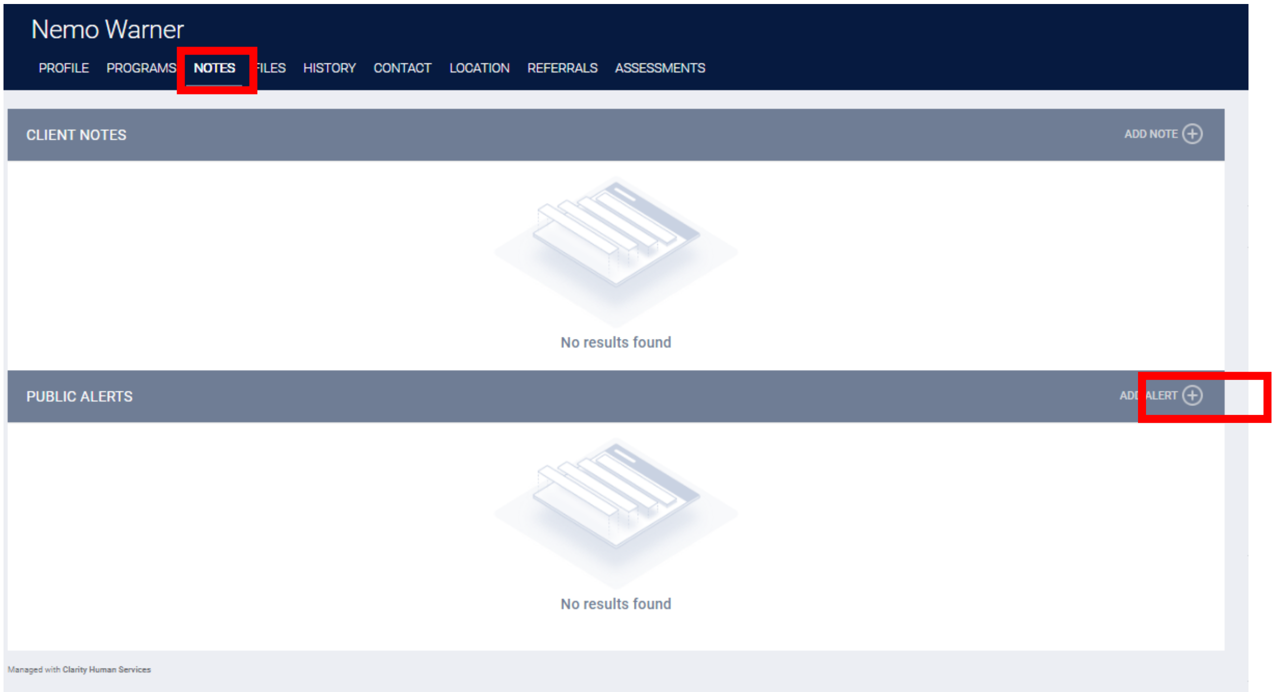




***Context:** As part of HUD's program evaluation process, they will want to know the client's income, non-cash benefit, and health insurance coverage statuses at the time of their death. These fields will all be available to complete on the program "Exit" page. Please note that you should record any income, non-cash benefits, and health insurance that were received at the time of death. This means that if a client was receiving income, non-cash benefit sources, and/ or health insurance prior to passing – those should all be captured in HMIS on their Exit record. Sometimes service providers assume they should capture income as $0, and not capture non-cash benefit sources or health insurance coverage because the client is no longer receiving those resources after death, but this is incorrect. Instead, service providers should report to HUD (via the Exit page/ record) all resources received by the client prior to their death via the Program Exit page, rather than indicating that the client was receiving no resources at the time of death. For reference the income, non-cash benefits, and health insurance fields to be on the Exit page/ record are listed on the righthand side of this section.

Steps To Add a Public Note for a Deceased Client from in HMIS:

A. Navigate to the client's HMIS profile from the homepage using their name or unique ID number.
B. From the client's HMIS profile page, navigate to the "Notes" tab of HMIS. Select "Add Alert"



C. Add "Deceased" in the Title, add "Client passed away on xx/xx/xxxx" (date they passed, if known) in the Note section. Add "Expiration Date" 6 months from when the Alert was created.