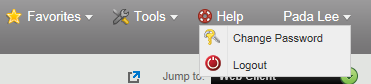
**To login**, click [here](https://fileshare.lahsa.org/) and please use the **email you had provided** and the temporary generic password: **P6ck&G0!**

You can change the password to a permanent one by going to the top right and clicking on the arrow next to your name:



**Tools for this Process:**

* FTP website**:** [https://fileshare.lahsa.org](https://fileshare.lahsa.org/)
* HMIS Migration blank dataset for Housing Navigators (attached)
* Updated HMIS Consent (same as in CES Survey v1.1) (attached)
* Complete SPA dataset (Lindsey Giblin will send by April 1)

**Preparation (Option 1):**

·  The CES lead organization can assume responsibility for uploading all consent and PII (personally identifying information) on behalf of their organization and all CES partner organizations in their SPA.

·  If this is the case, the CES lead organization can designate one person as the Primary Contact for data migration for their organization (likely the Matcher).

**Preparation (Option 2):**

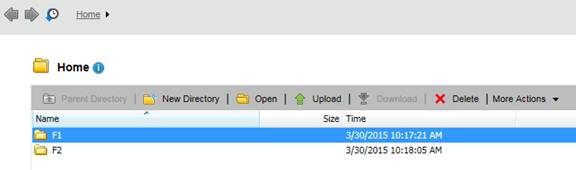
·  The CES lead organization can share responsibility for uploading consents and PII (personally identifying information) with other CES partner organizations in their SPA.

·  If this is the case, each CES partner organization will need to designate one person as the Primary Contact for data migration for their organization (in addition to Matcher). Please send name, email, and SPA for this person to [plee@lahsa.or](mailto:plee@lahsa.org)g.

**Migration Process:**

1.       Housing Navigator (Outreach Worker/Case Manager/other) obtains updated consent (see attached consent from CES Survey Packet v1.1) along with Name, Date of Birth, and Social Security Number.

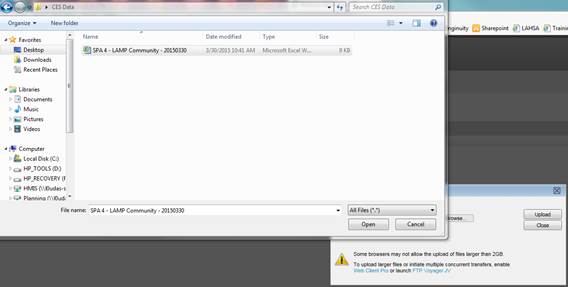
2.       Housing Navigator gives PII to the "Primary Contact" (either CES matcher or primary contact at organization, depending on process selected above) by filling in the **BLUE** columns on the attached spreadsheet and uploading to **Folder 1** (“**F1**”) on the FTP site. **Please note that the file should be named in the following format: “SPA # - Organization Name – YYYYMMDD”.**



a.       Double-click on “F1” and click Upload.

b.       Browse and select the file.

c.        Click Upload and Close. You may see a notification about file size, but the file should already be uploaded.



3.       Housing Navigator/Outreach Worker/Case Manager gives paper consent to SPA CES lead organization.

4.       "Primary Contact" obtains paper consent and PII from **Folder 1** (“**F1**”), adds organization information (**ORANGE** columns), VI-SPDAT data (**PINK** columns) and MIF data, if available (**GREEN** columns) to create a complete record.

5.       "Primary Contact" uploads complete records data into **Folder 2** (“**F2**”) on the FTP site. Please see upload process above and delete the original file in **Folder 1** (“**F1**”) by selecting the file and clicking “Delete”.

**6.**       "Primary Contact" uploads scanned copies of client consents, and places them into **Folder 2** (“**F2**”) FTP folder. **Please use the same naming convention as the excel file, but saved as .pdf.**

7.       Clients will be migrated into HMIS within 5-8 business days.

8.       "Primary Contact" will receive notification from LAHSA's HMIS department when the transfer has been completed.

9.       Any additional notes about client migration can be found in the comments section of the client’s program record in HMIS.

**Important Reminders:**

·  We have created this process in order to allow us to share PII data in a HIPAA compliant way. *\*Please do not email names, dates of birth, and social security numbers. This information may only be shared via the FTP process (or encrypted email).\**

·  It is important that SPAs *prioritize* obtaining updated CES consents, so that CES data can migrate to HMIS *as soon as possible*. This process is a priority for the county. We hope to have a good quantity of client data in HMIS in the next three months.

·  The minimum requirement to transfer a client record is that a client consent is signed and given to the SPA CES lead, along with PII.

·  A scanned copy of the consent may be uploaded to HMIS. This is a best practice that allows for maximum accountability however it is \*not\* a requirement for a record to be transferred.

·  This process does not apply to DMH directly operated clinics. DMH directly operated clinics will not be migrating their clients until they update their organizational agreements.

·  DMH contracted clinics may participate in this process. DMH contracted clinics will need to keep the updated consents for their records, however they must also provide a copy to the SPA CES lead.