



Strengthening the social service community through information systems, training, and advocacy.

MAACLink Administrator
Rick McKeever

MAACLink

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Thank you for your interest in MAACLink.

MAACLink is a method for your agency to use a shared database of client services information. Over 200 social service agency sites in the Kansas City metropolitan area use MAACLink.

In order to access MAACLink, you first connect to an Internet service provider. Once you are connected, you can establish a session on MAACLink's remote access server.

Accessing MAACLink requires the following:

- ❑ A Microsoft Windows operating system, Windows 98/ME/2000/XP/Vista (XP/Vista is recommended).
- ❑ Broadband Internet connection (Cable, DSL or T1)
- ❑ Microsoft Internet Explorer, version 6.0 or later.
- ❑ A Computer of 500 MHz or faster is recommended, with 128 MB RAM.
- ❑ No software installation is required, you just access the MAACLink program over the internet at: www.clienttrack.net/maac-kc

Fees for MAACLink access are based upon your agency's budget for providing emergency assistance and are detailed in this packet as Exhibit B. You will be billed quarterly based upon the fee structure in Exhibit B. In order to indicate your agency's annual budget, please complete the section on the Agency Partner Agreement (page 8).

An agency can join MAACLink as one of three types: standard, hidden, or anonymous. Services entered into the system by a standard agency can be viewed by all other agencies. An anonymous agency's entries will appear without revealing the source of provided services. Hidden agencies' services will not appear to members of any other agency and are only viewable to members of the source agency and certain authorized MAAC staff.

Enclosed are the following documents:

1. The General Rules form
2. The Agency Partner Agreement
3. "Exhibits" of the Agency Partner Agreement
4. An Agency Information form
5. Statement of Confidentiality and Request for MAACLink Account

Before I can assign your agency an account on the MAACLink network, your Executive Director must sign the Agency Partner Agreement. All users must fill out a Confidentiality Statement and Request for Account and the Executive Director must sign each of these as well. Your agency should also return the completed agency information form and service/programs list.

Please return the signed documents to me. Once I receive them, I will contact you regarding times to set up the system and to hold the introductory training session.

Feel free to call with any questions. We look forward to seeing you on-line with MAACLink.

Sincerely,

Rick McKeever

Rick McKeever
MAACLink Administrator
rmckeever@maaclink.org

MID AMERICA ASSISTANCE COALITION

GENERAL RULES

September 2004

MAACLink Needs Rules

MAACLink is national model for inter-agency communications and collaboration. There are very few communities across the country where separate social service agencies share information as broadly as we do in MAACLink. Due to its broad reach, MAACLink must be especially well protected from potential misuses of the information. The overriding concern in the use of MAACLink must be to protect clients' rights and interests.

MAAC's rules for using MAACLink are designed to insure that only authorized agency staff will use the computer system for legitimate agency purposes, such as tracking client services, evaluating service needs, and creating necessary administrative reports. Any other uses are unauthorized and strictly prohibited. *Unauthorized use of the system is a violation of clients' rights and a threat to the future of MAACLink.*

MAAC provides MAACLink as a service to partner social service agencies. As stated in the contract, MAAC can withdraw the service at any time. This is the primary means of control that MAAC staff will use to deal with rules violations.

Note: This document in no way alters the agreement between MAAC and its agency partners established in the Agency Partner Agreement.

Clients Own Their Data

The client releases client and service data to MAAC. Clients must sign the release either on the MAAC Standard Intake Form or on an alternative form (if the agency does not use the Standard Intake Form). (See Exhibit A for a copy of the alternative form.) If the client does not sign the form, the data cannot be released to MAAC. (Except in the specific cases of MAAC-managed funds, clients are not obligated to release information to MAAC in order to receive assistance.)

One User Per Account

Each user of the MAACLink system must sign a confidentiality statement that is also a request for an account on the system. An "account" is simply a user login name and password for the system.

Every user of the system must fill out the confidentiality form. After the agency's executive director signs the form, it should be submitted to the MAACLink Administrator. When the MAACLink Administrator assigns the user an account and MAAC Staff have trained the user, the user can then—*and only then*—begin to use the system.

Further points to keep in mind are:

- Before volunteers can use MAACLink, they must submit a confidentiality form *just like any other user*.
- An authorized user cannot “delegate” use of their account to any one else including other authorized users.
- Each authorized user must be logged in to their own account whenever they use the system in any way.

New Users Require Training

A MAAC staff member must train new users of MAACLink. Not only does this training better initiate the users into the correct use of MAACLink, but it also introduces them to the MAAC staff. These staff members will provide MAACLink Agency Partners with technical support in the future.

Use of Client Information is Strictly Limited

The confidentiality form states that the client information entered into MAACLink is intended to determine eligibility of the client for services offered by participating agencies. Any other use of a client’s personal information—except where that information is aggregated into a statistical report that does not identify clients—is *strictly prohibited* and will result in termination of the user account.

Keep these points in mind:

- Do *not* use information in the MAACLink system for *any* unofficial interaction with the client. For instance:
 - A landlord *must not* use MAACLink to evaluate potential tenants.
 - “Friends” cannot look up information for or about their “friends.”
 - Business owners or operators cannot use the system to evaluate potential employees.
- Do *not* pass client information stored in MAACLink to a third party who 1) is not an authorized member of the MAAC information network or 2) intends to use the information for purposes other than the official business of a MAAC-affiliated agency.
- Conversations about specific MAACLink information should be kept at a professional level and such conversations should be conducted in a secure environment.

MID AMERICA ASSISTANCE COALITION

MAACLink AGENCY PARTNER AGREEMENT

Terms and Conditions

The purpose of this document is to set out the terms under which the Mid America Assistance Coalition (MAAC) will operate MAACLink. MAACLink is MAAC's computer-based network information system through which emergency assistance is documented, clients are tracked, funds are managed, and reporting is accomplished accurately and without duplication of effort. The computer network, housed at a secure hosting site, includes a cluster of Microsoft SQL servers capable of supporting all the emergency assistance providers in the metro area.

The Executive Director of the MAACLink Agency Partner must sign this agreement before an account for that agency can be established on the MAACLink network.

System (MAAC) Responsibilities

MAAC agrees to assist in disseminating data received from participating agencies pertaining to emergency assistance service provided to recipients. Conditions under which the interchange of information is facilitated between MAAC, MAACLink Agency Partners, and other data systems will also be provided by MAAC.

Training: MAAC will provide initial on-site or group training to participating agencies. The training will include data entry training, confidentiality training and training on how to interpret reports generated from the system. This training will be completed *before* a user is permitted to participate in MAACLink.

Equipment: MAAC will maintain the database server, the network software and necessary support for the system. To do this, MAAC agrees to the following:

1. Maintain adequate equipment to support the database.
2. Provide the programming and on-going systems support, including a service contract on the hardware/network at the MAACLink hosting facility.
3. Purchase necessary software for the operation of the network.
4. Provide security of the data in the system, including backup.
5. Set standards for equipment at outlying sites.
6. Work to secure donations of suitable equipment for outlying agencies.
7. Respond to agency requests for upgrades and refinements of the system. New options will be showcased yearly at the annual training conference.

Accepted by: _____.

MAACLink Agency Partner Responsibilities

MAACLink Agency Partners agree to do the following:

1. Acquire and maintain computers, software, and modems according to MAAC standards.
2. Provide a connection from the agency to the Internet.
3. Commit its personnel to training and assure MAAC that untrained and/or unauthorized personnel do not use the computers.
4. Follow the validation requirement for emergency assistance.
5. Strictly adhere to the Level 1 Privacy Agreement (Page 7)
6. Assure the accuracy of information entered into the system. Any updates in information, error, or inaccuracy that comes to the attention of the MAACLink Agency Partner will be corrected by the MAACLink Agency Partner or called in to MAAC for correction.
7. Obtain *informed consent* (Exhibit A) from each individual entered into the computer system and maintain this form on file at the agency.

Errors, negligence, or misconduct by an agency

If there is error, negligence or misconduct by an agency, that agency will indemnify and hold harmless MAAC, its agents, servants and employees from any and all claims, demands, actions, suits, judgments and liability arising out of or in connection with this Agreement or the use of data obtained under the terms of this Agreement.

Charges

MAACLink Agency Partners agree to pay for information and service on a quarterly basis. The amount of the charges is set out in Exhibit B and is computed based upon the following:

--the MAACLink Agency Partner's annual operation budget for emergency assistance or homeless case management, not including awards or grants to clients.

All payments must be received by MAAC within fifteen (15) days of the date of the quarterly billing.

Accepted by: _____

CONFIDENTIALITY GUIDELINES

The MAACLink Agency Partner agrees to abide by all present and future federal and state laws and regulations and with all MAAC procedures and policies relating to the collection, storage, retrieval, and dissemination of MAACLink information.

The MAACLink Agency Partner agrees to limit access to information furnished by the MAACLink network to its own employees specifically for the purposes of verifying eligibility for service or entering into the system records of service provided.

MAACLink Agency Partners agree to use diligence and care in assigning staff to use the MAACLink system. All such employees will be required to sign the Statement of Confidentiality. Each Statement of Confidentiality will be forwarded to MAAC and maintained on file. The name of the person who is entering information is a part of the computer record. MAAC personnel will verify that the person is authorized to enter data into the system.

The MAACLink Agency Partner further agrees to furnish to MAAC the names of all staff members who have access to the MAACLink information and certify that such staff persons are competent to have access to this information according to the provisions of this agreement. MAAC may, at its option, disapprove access of the system to any individual, for any reason or for no reason at all.

The MAACLink Agency Partner shall be responsible for the maintenance, accuracy, and security of all its emergency assistance records and terminal sites and for the oversight of agency personnel regarding confidentiality.

The MAACLink Agency Partner Executive Director must accept responsibility for the validity of all records entered by their agency and the confidential manner in which any MAACLink information is shared. The MAACLink Agency Partner Executive Director may designate an immediate subordinate staff member with supervisory responsibilities for verifying the accuracy of information. The MAACLink Agency Partner will provide MAAC with the names(s) and title(s) of the staff member(s) authorized to supervise data entry personnel. The Executive Director is responsible for assigning appropriate user rights based on the job description of each staff person. These designations are made on the individual Statement of Confidentiality agreements.

MAAC reserves the right to immediately suspend furnishing information covered by terms of this agreement to the MAACLink Agency Partner when any terms of this agreement are violated or are suspected to be violated. MAAC shall resume furnishing such information upon receipt of satisfactory assurances that such violations did not occur or that such violations have been fully corrected or eliminated.

Accepted by: _____.

Basic Privacy Agreement

ALL AGENCIES/ORGANIZATIONS THAT PARTICIPATE IN MAACLINK MUST ADHERE TO THE FOLLOWING STANDARDS:

- All users must have received MAACLink user training and have their OWN user name and password in order to access the system.

In order to receive training and a user name, the user must complete the Statement of Confidentiality form, get it signed by the executive director, and send it to MAAC by fax or mail.

- MAACLink users must adhere at all times to the Statement of Confidentiality agreement.
If MAACLink administrators detect a violation of any piece of the Statement of Confidentiality or the Privacy Agreement by an individual user, a Notice of Violation will be mailed to the executive director. Multiple violations may result in discontinuation of user or agency rights to MAACLink and is considered a breach of contract.

- All individuals who apply for a service or program enrollment at your agency must grant informed consent to put their files into the MAACLink system.

Each agency is responsible for storing the clients' signed consent/release forms on site. The agency may decide how often to ask the client to sign a consent/release form – each time a service is given or on a periodic basis.

- An agency may obtain a verbal consent from clients as long as they have completed the Verbal Consent Agreement form and faxed or mailed it to the MAAC office.

The Verbal Consent Agreement is not for each client, but instead serves as a notice to MAAC that your agency intends to collect informed verbal consent instead of signed consent from clients you serve.

Exception: Clients who receive a service from a MAAC–managed utility fund MUST sign a consent form or the Standard Intake Form that contains the consent paragraph.

- Clients own their MAACLink files.

Clients have the right to see their files if requested. Please keep this in mind when putting client notes, household notes or case management notes into the system.

- Clients have a right to revoke their consent.

If a client of your agency asks to have his/her file removed from MAACLink, call the MAAC office immediately and ask him/her to complete a Client Revocation form. The Client Revocation form is included in the Privacy Packet.

- MAACLink is not connected to any federal or national data collection facility.

MAACLink data is collected only at the local level and will never be electronically fed into a national database for homeless or at-risk individuals.

- The Mid America Assistance Coalition uses *aggregate* data from the Kansas City metro area to create the Annual Statistical Report and for other advocacy efforts on behalf of our homeless and at-risk populations.

Aggregate data does not identify individuals or include pieces of personal information, such as a client's social security number.

- MAACLink administrators may access your clients' personal information in order to help users with data entry or reporting questions.

The administrators at MAAC who have access to the MAACLink system must abide by the same privacy agreement as other users AND sign an additional statement of trust. MAACLink administrators will only view client information: 1) at the user's request during a helpdesk call, 2) in the case that there is a technical problem with a client's file that is affecting system performance, or 3) to remove a client from the system when a Client Revocation form is received at MAAC.

- Reports that identify clients and that are generated directly from MAACLink should not be shared with outside organizations at any time.

An outside organization is one that is not online with MAACLink and has not submitted a contract to MAAC.

- Do not give client information to outside organizations or individuals who call your agency and request it by phone.

Because MAACLink is a shared database, most clients' files have been updated by more than one participating agency. Therefore, it creates a liability for *all* participating agencies if client information is shared with outside entities. You may refer the caller to MAAC's Executive Director if he/she persists. This rule applies even to law enforcement officials.

If your agency is served with a subpoena that requires you to hand over a client's electronic file, this subpoena can only apply to the client's information that has been entered by your agency. **Call the MAAC Executive Director if your agency's electronic files are subpoenaed.**

- Always log off of MAACLink or lock your computer screen before walking away from the computer.

- Do not write down your user name and password and stick it to your computer.

If you feel like you must write down your password in order to remember it, please be sure you hide it in a secure place. If you suspect someone may have learned your log-in information, change your password immediately.

- Do not send clients' social security numbers in emails.

Email is not a secure way to transmit client-specific information because it can be intercepted (or hacked) in transfer.

- Do not share client information with authorized coworkers in public places or common areas in your workplace.

Be aware of the possibility that unauthorized people, including other clients, may overhear your conversation or phone calls.

TWO EXCEPTIONS TO THE PRIVACY AGREEMENT:

- Duty to Warn.

As professionals, we all have a duty to guard each other from harm. If a client has threatened you, him/herself, or others at your organization you must warn other users of a potential threat through the MAACLink system. The best way to do this is by using a Warning Notification ('Notifications' in the left column under the Client Case Management tab). This note should read, "Alert! Alert! Please call [agency name] at [agency number] before serving this person." Call a MAACLink administrator for help or questions.

- Child Abuse and Neglect.

If you see evidence or have reason to believe that a child/children have been abused or neglected then you have a duty to report it to authorities, regardless of confidentiality agreements. You may call 1-800-422-4453 to find a local phone number for reporting purposes.

Accepted by: _____.

ENFORCEMENT OF CONFIDENTIALITY

MAAC has the absolute right to terminate without notice services of MAACLink for the purpose of investigation of any suspicion of breached confidentiality. Thereafter, MAAC may terminate this agreement if MAAC, in its sole discretion, determines that there has been a breach of confidentiality.

Signatures of Partner Agency and MAAC Executive Directors

The Executive Director (or equivalent) of the MAACLink Agency Partner indicates agreement with the terms stated in pages five (5) through seven (7) of the MAACLink Agency Partner Agreement and pages eight (8) through ten (10) of the Privacy Agreement by signing below. All seven pages (pages 5-11) will then be forwarded to MAAC. Both of these steps are prerequisites to the establishment of a User account on the MAACLink network. Once received, the Executive Director of MAAC will sign this page and copies of all four pages will be sent back to the MAACLink Agency Partner.

Executive Director
MAACLink Agency Partner (please print)

Executive Director
MAAC

Executive Director's E-Mail Address
MAACLink Agency Partner (please print)

Executive Director's Signature
MAACLink Agency Partner

Agency Name

Agency Address (include zip code)

Agency Annual Budget

Effective Date and Term.

This agreement will become effective on the _____ day of _____, 200____, and continue in effect for one year. Thereafter, this agreement will be automatically renewed on each subsequent anniversary date, unless terminated immediately for cause or by either party with 30 days written notice.

Date of agreement

Exhibit A

RELEASE OF INFORMATION

This agency may enter the personal information I have given them into the MAACLink computer system that operates locally inside a secure and confidential network of agencies by trained representatives. The information I have provided is true and correct. I understand that my information is electronically tracked in order to assess my household needs and provide better services such as housing, utility assistance, food, and other services. My information may be shared among the agencies from which I have requested emergency assistance or case management. If I am applying for utility assistance, my identifying information may be shared with my utility provider in order to secure payment to the correct account.

An agency representative has answered my questions about my privacy concerns.

Applicant's Signature

Date

Interviewer's Signature

Date

Exhibit B

FOR THE MAACLINK PRICING STRUCTURE

CONTACT: DAVID JOHNSON 816-561-2727 X116



STATEMENT OF CONFIDENTIALITY AND REQUEST FOR ACCOUNT

To receive a MAACLink account, fill out this form and fax to 816-561-7277 or mail to: Mid America Assistance Coalition
1 W. Armour Blvd, Ste. 301
Kansas City, MO 64111

Please call MAAC at 816-561-2727 to schedule a training on how to use MAACLink.

When this form is received by MAAC, a MAACLink administrator will contact you about training and your unique user name and password. Training must be completed before gaining access to the system.

Name (Please Print)

Agency Name and Branch Location

User Statement of Confidentiality

By signing this document, I agree to maintain strict confidentiality of information obtained through the MAACLink computer network. This information will be used only for the legitimate client service and administration of the above named agency. Any breach of confidentiality will result in a Notice of Violation and possible termination of my or my entire agency participation in MAACLink.
I acknowledge that I have received or have access to the MAACLink Privacy Packet.

Please Initial To Agree To the Following Statements

- _____ I understand that my username and password are for my use only. I will not share them with anyone.
- _____ I understand that I must take all reasonable means to keep my password hidden and secret.
- _____ I understand that the only individuals who can view MAACLink information are authorized users and the clients to whom the information pertains.
- _____ I understand that I may only view, obtain, disclose, or use the database information that is necessary in performing my job. I will not look up information on family, employees, friends or for any other personal use.
- _____ I understand that these rules apply to all users of MAACLink, whatever their work role or position.
- _____ I understand that hard copies of MAACLink information must be kept in a secure file.
- _____ I understand that once hard copies of MAACLink information are no longer needed, they must be properly destroyed (shredded) to maintain confidentiality of clients.

User Signature

Date

Email Address

Supervisor's Name

Business Number

Agency's Executive Director please check the appropriate workgroup for user:

- Emergency Assistance Workgroup
- Hotline Workgroup
- Aggregate Reports
- HMIS/APR workgroup
- Shelter Intake Workgroup
- Fund Manager for Agency
- SBCM Workgroup
- Shelter Manager Workgroup

I approve and accept responsibility for this MAACLink user's access to the MAACLink shared client information system.

Executive Director's Signature

Date

MAAC Office Use Only

Username: _____
Training Date: _____

Date Added: _____
MAAC Staff Name: _____



MAACLINK WORKGROUP DESCRIPTIONS: LEVELS OF USER ACCESS

Even though it is unlikely, a user may have rights to multiple workgroups.

For protection of all client information, MAAC requests that users have access *only* to what is needed to perform their job and no more.

Emergency Assistance Workgroup

Users may enter shared client and household files, services, program enrollments, and run related reports.

HMIS/APR Workgroup

For users at agencies that receive HUD McKinney-Vento dollars and must generate one or more Annual Progress Reports. In this workgroup the user may also enter shared OR hidden client and household files, services, and program enrollments. Access to the HUD APR and supplementary audit reports, emergency assistance, and homeless client reports. This workgroup includes all functionality of the Emergency Assistance Workgroup.

Strengths Based Case Manager Workgroup

Users may enter shared OR hidden client and household files, services, program enrollments, client goals, action plans, case notes, and run related reports. Special SBCM tools are also available, such as the Life Domain Rating Scale and Strengths Assessment. This workgroup also includes all functionality of the HMIS/APR Workgroup.

Hotline Workgroup

For Hotline for the Homeless users of MAACLink. User may add or edit shared client files, view bed availability at shared emergency shelters, view shelter bar lists & waiting lists, and create reservations for all household members. No access to client services, program enrollments, or case notes.

Shelter Intake Workgroup

Users may enter shared client and household files, make shelter reservations, check clients in and out of the facility, assign beds/rooms in a facility, enter client case notes, maintain bar lists and waiting lists, and run related reports. This workgroup does *not* provide access to client services or program enrollments.

Shelter Manager Workgroup

Contains all of the same rights as the Shelter Intake Workgroup plus the Housing Designer. Housing Designer allows the user to add or deactivate beds/rooms in the facility, create chore lists, locker or storage availability, and client eligibility rules for the facility.

Aggregate Reports Workgroup

For users who do not need access to client specific, data entry screens or reports that contain client identifiers. This workgroup only provides aggregate reports without specific client information.

Fund Manager Workgroup

Provides designated users at agencies with the tools to manage agency funds and track fund utilization by connecting client services to managed funds. Allows fund balances to be set up by agencies for tracking by intake workers when helping clients. Also, can provide for payment of client bills in conjunction with agency finance personnel.