CaseWorthy- New User Agency Process

I. Agency Partner Agreement – **2 signed originals** - signed by Director or Chief Executive Officer.
   
   a. Returned to Community Council along with cost share.
   b. Executive Director of the Community Council will sign both.
   c. 1 will be returned to the agency and 1 is retained by the Community Council.
   d. To be renewed annually.

II. Agency Director or Chief Executive Officer must designate a CISS Agency Compliance Monitor who will be the Community Council’s CISS Staff’s contact person. The CISS Agency Compliance Monitor will be responsible for:
    
    a. Assigning staff who will be accessing/using the CISS.
    b. Providing CISS Staff with the names/emails/phone numbers of all users.
    c. Identifying the projects to be set up in CaseWorthy (including exact services provided by each project and funding for each project).
    d. Monitoring compliance, confidentiality, and reporting.
    e. Monitoring agency staff who are on and off the system. (*And notifying Community Council within 3 business days after a CaseWorthy user leaves the agency*).
    f. Maintaining originals of all signed User Agreements.

III. Community Council will provide the required participation forms to the Agency CISS Compliance Monitor:
    
    a. User Policy and Confidentiality Agreement
    b. Notice of Client Rights
    c. Client Revocation of Consent Form
    d. Intake Sign “Consumer Notice”
    e. CISS Privacy Notices – Full notice and summary notice
    f. Employee Acknowledgement
    g. Grievance Policy Form
    h. Sample Intake Form
IV. Training

a. The Compliance Monitor and each new user will sign the User Policy and Confidentiality Agreement, after which they receive their user ID and password. (Original of the agreement is to be retained at agency; copy forwarded to Community Council).
b. Agency Compliance Monitor and all Agency users will be required to attend training prior to having access to the CaseWorthy System.
c. Activating and suspending any (new) user in CaseWorthy is at the discretion of Community Council CISS staff, and further training may be required prior to user account activation.
d. Ongoing training will be required and will be arranged between the Community Council and Agency based on the Agency’s needs.

Acknowledge receipt and acceptance of these procedures by signing below and returning the original to the Community Council – be sure to keep a copy for your records.

Agency Director __________________________ Signature __________________________ Date __________

HMIS Compliance Monitor __________________________ Signature __________________________ Date __________

It is the role of Community Council to facilitate agency implementation of CISS, monitor data input for compliance and reporting requirements, monitor for privacy, security and confidentiality, and to provide reports to HUD and other funders as requested and required.