

**NEW YORK STATE OFFICE FOR THE AGING**

2 Empire State Plaza, Albany, NY 12223-1251

Andrew M. Cuomo, Governor

An Equal Opportunity Employer

Greg Olsen, Acting Director

<b>PROGRAM INSTRUCTION</b>	<b>Number:</b>	<b>19-PI-13</b>
	<b>Supersedes:</b>	<b>N/A</b>
	<b>Expiration Date:</b>	<b>N/A</b>

**DATE:** May 29, 2019

**TO:** Area Agencies on Aging Directors, PeerPlace Champions, NY Connects Local Administrative Agencies, NY Connects Coordinators, and Regional NY Connects ILC Grantees

**SUBJECT:** Saving Information in the Statewide Client Data System

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**ACTION REQUESTED:**

Effective immediately.

**RESPONSE DUE DATE:**

No response necessary.

**PURPOSE:**

The purpose of this Program Instruction is to clarify the proper method of saving information in the Statewide Client Data System when a text field specific to that information is not provided.

**BACKGROUND:** NYSOFA has received inquiries on where information—including

sensitive information—should be entered in the Statewide Client Data System for later use if a text field is not provided for that information. Text fields in the Statewide Client Data System should only be filled with information that directly corresponds with the text field label. A text field should not be used as a “placeholder” for information unrelated to the text field label. For example, the address fields should only contain a client’s address; they should not be used to enter notes pertaining to the client.

Any information that needs to be maintained but does not have a dedicated text field should be maintained in Case Notes. This is especially important when dealing with sensitive information, as data entered in the Client Profile text fields (which includes the address fields) may appear in search results and be available to users without a valid need to access such information. Maintaining information in a secure location within the Statewide Client Data System such as Case Notes prevents it from being made available beyond the minimum necessary. Before entering any sensitive information in Case Notes or elsewhere in the Data System, it is also important to first determine whether there is a business need for collecting and maintaining the information.

**PROGRAMS AFFECTED:**

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|-----------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------|
| <input checked="" type="checkbox"/> Title III-B                             | <input checked="" type="checkbox"/> Title III-C-1                                                                            | <input checked="" type="checkbox"/> Title III-C-2 |
| <input checked="" type="checkbox"/> Title III-D                             | <input checked="" type="checkbox"/> Title III-E                                                                              | <input checked="" type="checkbox"/> CSE           |
| <input checked="" type="checkbox"/> SNAP                                    | <input checked="" type="checkbox"/> Energy                                                                                   |                                                   |
| <input checked="" type="checkbox"/> EISEP                                   | <input checked="" type="checkbox"/> NSIP                                                                                     | <input checked="" type="checkbox"/> Title V       |
| <input checked="" type="checkbox"/> HIICAP                                  | <input type="checkbox"/> LTCOP                                                                                               |                                                   |
| <input checked="" type="checkbox"/> NY Connects: Choices for Long Term Care | <input checked="" type="checkbox"/> Other: All workflow paths for Aging Network Services in the Statewide Client Data System |                                                   |

**CONTACT PERSON:** Any questions or concerns should be directed to the entity’s assigned Aging Services Representative or NY Connects Coordinator.