Release of Information Workflow

On a client’s Release of Information Tab (ROI) follow the instructions for recording the ROI.

1. Choose the household members and click “Search” by the Provider

2. Select the Agency and the Projects of the Agency that the client will be a part of.

Choose from the search results to see them in the Selected Results.
3. The ROI information (Release Granted, Dates, Documentation, and Witness) should match the signed Client Consent form which must have 1 box checked and only 1 box checked (Profile Plus, Profile Only, Denied Sharing).

   a. **Release Granted:** if the client chose “Profile Plus” or “Profile Only” choose “Yes.” If the client chose “Denied Sharing” choose “No.”
   
   b. **Dates:** should match the Client Consent Form
   
   c. **Documentation:** match from the client consent form.
      
      ✓ “2016 Signed Consent – Profile Plus”
      ✓ “2016 Signed Consent – Profile Only”

   OR
      
      ✓ “2016 Signed Consent – Denied Sharing”

   d. **Witness:** enter the name who signed the consent form with the client.

   Notes:
   
   • After being assessed with the VI-SPDAT, Clients should also have a separate ROI added with “2017 SubCook CE-VISPDAT Consent” as the documentation.
   
   • **Only the Call Center** may use “Verbal Consent”

4. Upload a scanned copy of the ROI to the Agency’s ROI by clicking the binder clip on the left side of the table row of your Agency (this is for reference, in case HMIS staff need to verify client consent).
   
   ✓ You only need this at the Agency level.

5. When uploading the Client Consent form you **must** add “**HMIS ROI**” to the File Description text box or it will be reported as missing. **Do not use “HMIS ROI” for any other consent or document.**