

# Transacting Releases of Information (ROI) in HMIS

Download the Verbal Release Form and Frequently Asked Questions here.

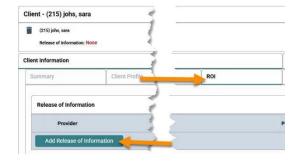
## Overview

Using information collected in the Verbal Release Form, transact two ROIs:

- One for your parent/login provider (the default option) and
- One for the program provider (Emergency Shelter, RapidReHousing, Permanent Supportive Housing, etc.)

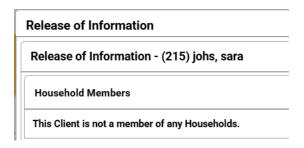
### Instructions

- In the participant's record, click the "ROI" tab.
- Then, click "Add Release of Information."



For participants not in households:

- If a participant is not in a household, the top of the next screen looks like this:
  - Skip to the "ROI Prompts" section on the next page.



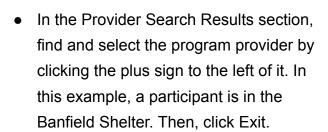
Cont'd on next page.

#### For participants in households:

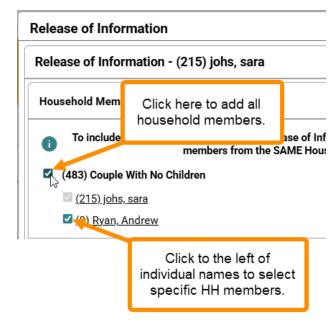
- On the next screen, click the box to the left of other household members who are also in the entry.
  ROIs will be added for each household member you select.
  - You can also click the box to the left of the household header to select all household members.

# **ROI Prompts**

 Your login provider (your agency) is automatically selected. In this example, let's say a user works at TPI. Click Search.

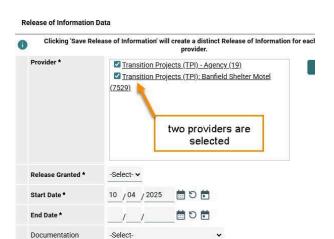


 Release Granted: Select Yes or No based on whether the participant agreed to share data or not.







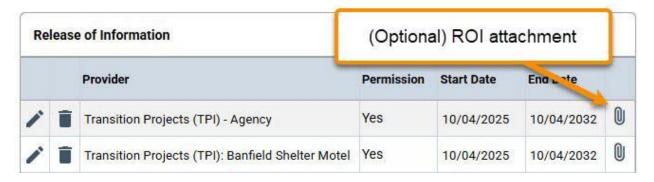


- Start date: the ROI start date *must* equal the program start date *even if consent was* collected on a different day.
- End date: **7 years** after the start date.
- Documentation: Select Verbal Consent.
- Witness: Enter the name of the person identified in the Witness field of the Verbal ROI form.
- Click Save Release of Information.

## **Examples**

Here are two examples of a successful ROI transaction.

• Example 1: A user at TPI enrolled a participant in the Banfield Shelter starting on Oct 4, 2025 and the participant agreed to share their data.



• Example 2: A user at Our Just Future enrolled a participant in the RapidReHousing program starting on September 24, 2024 and the participant did not want to share their data.



Please contact <a href="mailto:hmishelp@multco.us">hmishelp@multco.us</a> if you have any questions.

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