



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."

A screenshot of the HMIS interface for a client named "(215) johs, sara". The "Client Information" section is active, showing tabs for "Summary", "Client Profile", and "ROI". An orange arrow points from the "ROI" tab to the "Add Release of Information" button in the "Release of Information" section below. The button is labeled "Add Release of Information" and is highlighted in blue.

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.

A screenshot of the "Release of Information" screen for a client named "(215) johs, sara". The screen displays the title "Release of Information" and "Release of Information - (215) johs, sara". Below this, there is a section titled "Household Members" which states "This Client is not a member of any Households."

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.

Release of Information

Release of Information - (215) johs, sara

Household Members Click here to add all household members.

To include

☒ (483) Couple With No Children

☒ (215) johs, sara

☒ (40) Ryan, Andrew

Click to the left of individual names to select specific HH members.

ROI Prompts

- Your login provider (your agency) is automatically selected. In this example, let's say a user works at TPI. Click Search.
- In the Provider Search Results section, find and select the program provider by clicking the plus sign to the left of it. In this example, a participant is in the Banfield Shelter. Then, click Exit.
- Release Granted: Select Yes or No based on whether the participant agreed to share data or not.

Release of Information Data

Provider * Transition Projects (TPI) - Agency (19) Search My Provider Clear

Release Granted * -Select-

Start Date * 10 / 04 / 2025

End Date * / /

Documentation -Select-

Witness

Save Release of Information Cancel

your default login provider or agency

Provider Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M
Provider												Level	

Release of Information Data

Clicking 'Save Release of Information' will create a distinct Release of Information for each provider.

Provider *

☒ Transition Projects (TPI) - Agency (19)

☒ Transition Projects (TPI): Banfield Shelter Motel (7529)

two providers are selected

Release Granted * -Select-

Start Date * 10 / 04 / 2025

End Date * / /

Documentation -Select-

- 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.

Release of Information			(Optional) ROI attachment			
		Provider	Permission	Start Date	End Date	
		Transition Projects (TPI) - Agency	Yes	10/04/2025	10/04/2032	
		Transition Projects (TPI): Banfield Shelter Motel	Yes	10/04/2025	10/04/2032	

- 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.

Release of Information			Participant prefers not to share their data			
		Provider	Permission	Start Date	End Date	
		Our Just Future: HUD Family Futures - RRH	No	09/24/2024	09/24/2031	
		Our Just Future - Agency	No	09/24/2024	09/24/2031	

Please contact hmishelp@multco.us if you have any questions.

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