



Transacting Releases of Information (ROI) in HMIS

Access 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 "Release of Information" section also includes a "Provider" dropdown menu.

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 the client name. Below this, there is a section titled "Household Members" which states: "This Client is not a member of any Households."

Cont'd 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 Member

To include

Release of Information - (215) johs, sara

members from the SAME Household

☒ (483) Couple With No Children

☒ (215) johs, sara

☒ (C) Ryan, Andrew

Click here to add all household members.

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.

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

your default login provider or agency

Save Release of Information **Cancel**

- 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.

Provider Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M
Provider												Level	
+	+	Grand Reco.	Shelter (E									Level	
+	+	Transition Projects (TPI): Banfield Shelter Motel (7529)										Level 5	

- **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.
- **Client Signature:** Skip this.
- **Case Signature:** Skip this.
- Click **Save Release of Information**.

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

Provider *	☒ Transition Projects (TPI) - Agency (19) ☒ Transition Projects (TPI): Banfield Shelter Motel (7529)	Search
Release Granted *	-Select-	
Start Date *	10 / 04 / 2025	
End Date *	/ /	
Documentation	-Select-	
Witness		
Client Signature	Add	Skip Client Signature and Case Manager Signature
Case Manager Signature	Add	
Save Release of Information		Cancel

Wellsky added the new ROI buttons in early August, 2026. HSD does not require the use of these buttons. Data added to Client Signature and Case Manager Signature will not be migrated to Clarity HMIS.

Examples

Here are two examples of an accurate 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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Document Revision History

July '26:

- Updated:
 - ROI with signature buttons