Homeless Services Department

Transacting Releases of Information (ROI) in HMIS

Access the *Verbal Release Form* and Frequently Asked Questions [here](#).

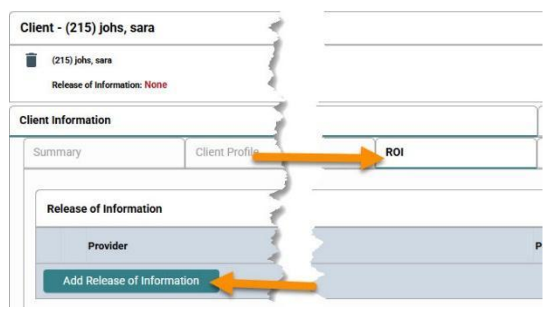
Overview

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.)

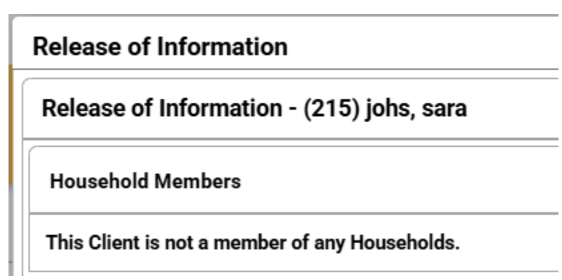
Instructions

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



For participants not in households:

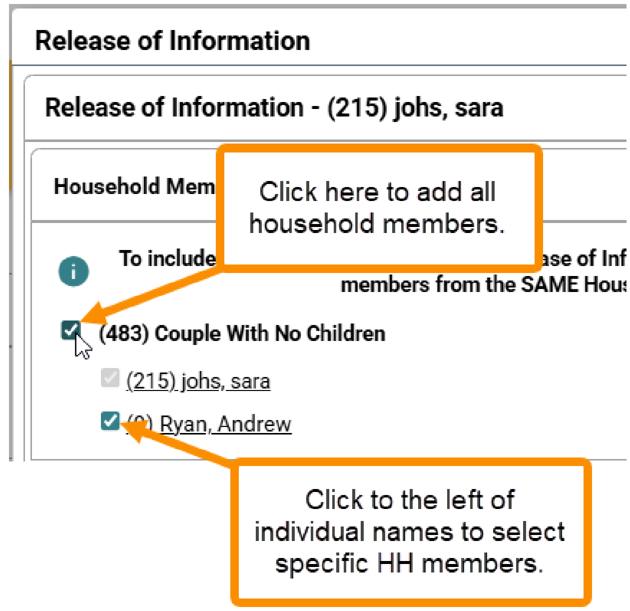
- If a participant is not in a household, the top of the next screen looks like this:
    - Skip to the "ROI Prompts" section on the next page.



Cont'd next page.

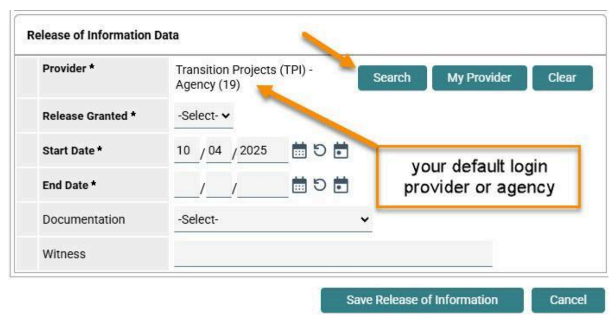
For participants in households:

- 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

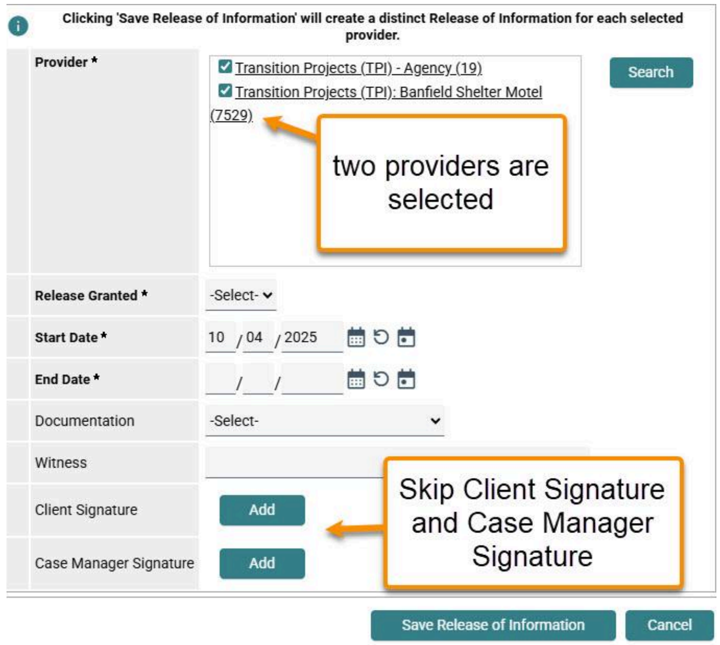
- Your login provider (your agency) is automatically selected. In this example, let's say a user works at TPI. Click Search.



- 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.
- **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.**



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.

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

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Document Revision History

July '26:

- Updated:
    - ROI with signature buttons