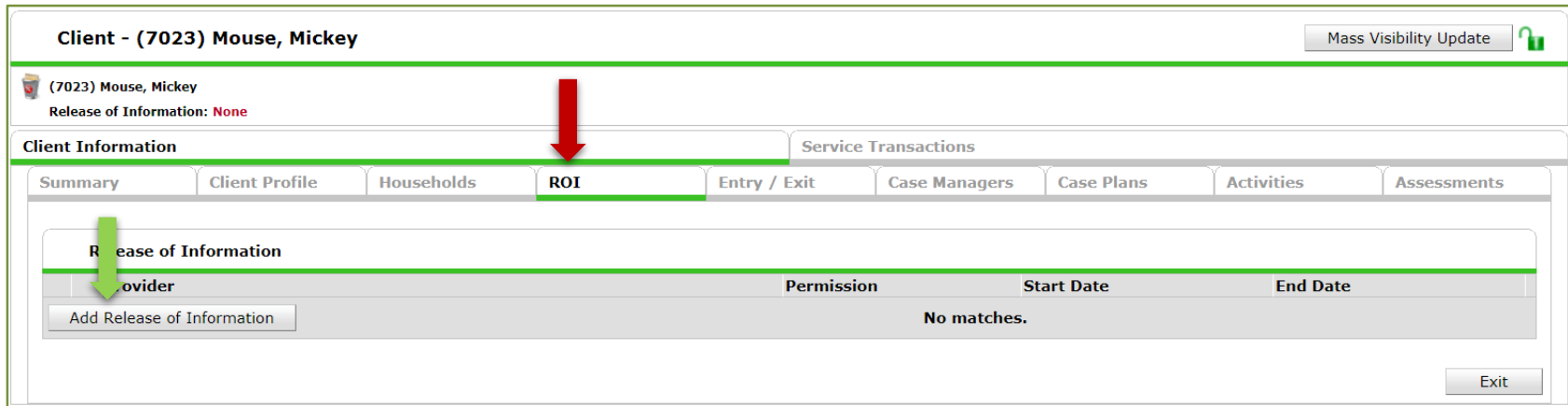
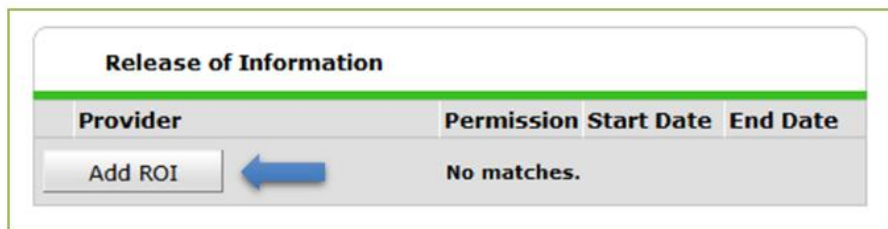


# Adding an Open HMIS Release of Information (ROI) (updated 9/5/2018)



Click on the **ROI tab** under **Client Information** (red arrow). Click **Add Release of Information** (green arrow). **Release of Information** window appears.



Click **Add ROI** (blue arrow)

**Release of Information** appears.

**Provider:** defaults to the provider you are in.











**Want to apply this ROI to more to more Providers?**  
(e.g., add this ROI to two or more providers in your agency)

Click **Search** (green arrow)

Click on the  to move **Provider to Provider Search Selected Results**



Click **Exit** when all Providers added

**Provider Search Results**

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
Provider	Level	Phone	Location	Last Updated																							
 20/20 Vision Citizen Action Network (2152)	Level 3	(831)625-2020	Carmel By The Sea, CA 93921	12/28/2007																							
 Abode - AB109 RAP (3086)	Level 4	510-657-7409	Fremont, CA 94538	10/01/2014																							
 Abode - EAP (3309)	Level 4	510-657-7409	Fremont, CA 94538	10/01/2014																							
 Abode - Housing FAST Flex Funds (3186)	Level 4	510-657-7409	Fremont, CA 94538	10/01/2014																							
 Abode - Mental Health Permanent Supportive Housing Project (1879)	Level 5	408-325-5209	San Jose, CA 95124	10/01/2014																							
 Abode - Prop 36 RAP (3310)	Level 4	510-657-7409	Fremont, CA 94538	10/01/2014																							
 Abode - SCC Rental Assistance Program (3028)	Level 4	510-657-7409	Milpitas, CA 95035	10/01/2014																							
 Abode - SCVHHS ML RAP 1 (3218)	Level 5	510-657-7409	Milpitas, CA 95035	10/01/2014																							
 Abode - SCVHHS ML RAP 2 (3223)	Level 5	510-657-7409	Milpitas, CA 95035	10/01/2014																							
 Abode Services (1850)	Level 3	510-657-7409	Fremont, CA 94538	10/01/2014																							

Showing 1-10 of 1569    First    Previous    Next    Last

**Provider Search Selected Results**

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
Provider ID	Name	Level	Phone	Location	Last Updated																						
 2151	2nd Chance Youth & Family Services	Level 3	831-758-4820	Salinas, CA 93906	07/19/2010																						
 1	Community Technology Alliance (CTA)	Level 3	408-437-8800	San Jose, CA 95126	10/05/2014																						

**Release Granted:**

- Select **Yes** if the client grants full data sharing rights
- Select **No** if the client does not grant sharing rights

**Please note that the HMIS System Administrator will review clients' data sharing restriction requests and may make changes to a client's HMIS ROI data to ensure system functionality aligns with such requests.**

**Start Date:** defaults to today's date; enter date on which the client signed the ROI

**End Date:** enter date **1 year** after Start Date

**Documentation:** select Signed Statement from Client

Click **Save Release of Information**

Click on the **binder clip attachment icon** (red arrow).

**Client - (14133) test2, test** Mass Visibility Update

(14133) test2, test  
Release of Information: Ends 12/14/2018

**Client Information** **Service Transactions**

Summary | Client Profile | Households | **ROI** | Entry / Exit | Case Managers | Case Plans | Activities | Assessments

**Release of Information**

Provider	Permission	Start Date	End Date	
County of Santa Barbara	Yes	12/14/2017	12/14/2018	

Showing 1-1 of 1

**Release of Information File Attachment** appears.

Click on **Add New File Attachment** (red arrow) to upload a digital version of the ROI.

**Release of Information File Attachments**

File Attachments

Date Added	Name	Description	Type	Provider
No matches.				

The **binder clip attachment icon** now displays a blue circle with the number one, indicating the file has been attached (red arrow).

**Release of Information**







Provider	Permission	Start Date	End Date	
County of Santa Barbara	Yes	12/14/2017	12/14/2018	

Showing 1-1 of 1

**ENTERING AN ROI THAT SUPERSEDES A PREVIOUS ROI**

If the ROI you just entered (i.e. the current ROI) supersedes a previous ROI, then you need to revise the end date of the previous ROI. The previous ROI's end date must now be the day before the start date of the current ROI. For example, if the previous ROI covers 1/1/2018 – 1/1/2019 and the current ROI covers 4/1/2018 – 4/1/2019, then you must revise the end date of the previous ROI to 3/31/2018 (see screenshot below). Click on the pencil icon next to an ROI record to revise its end date.

Please revise the end date of the previous ROI's Restriction Details data in the same manner.

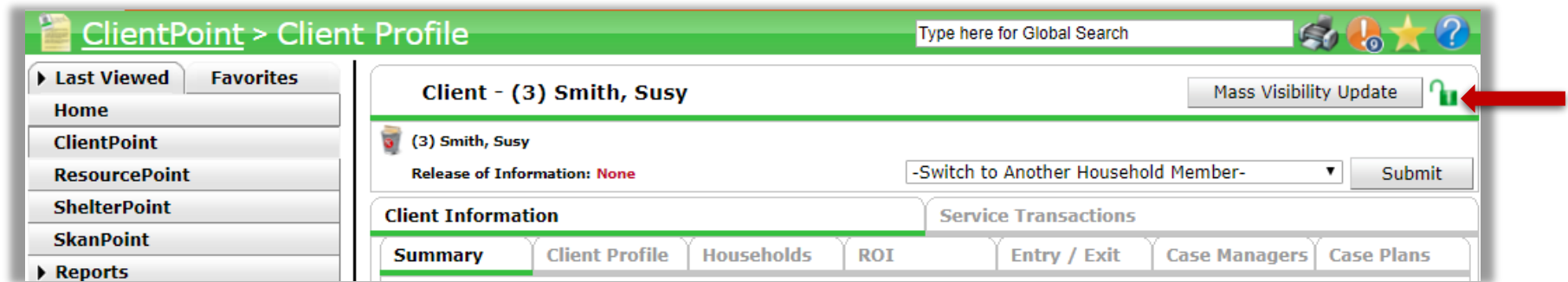
Release of Information					
	Provider	Permission	Start Date	End Date	
	 County of Santa Barbara	Yes	04/01/2018	04/01/2019	
	 County of Santa Barbara	Yes	01/01/2018	03/31/2018	

Add Release of Information
Showing 1-2 of 2


# Locking Down Client Profile

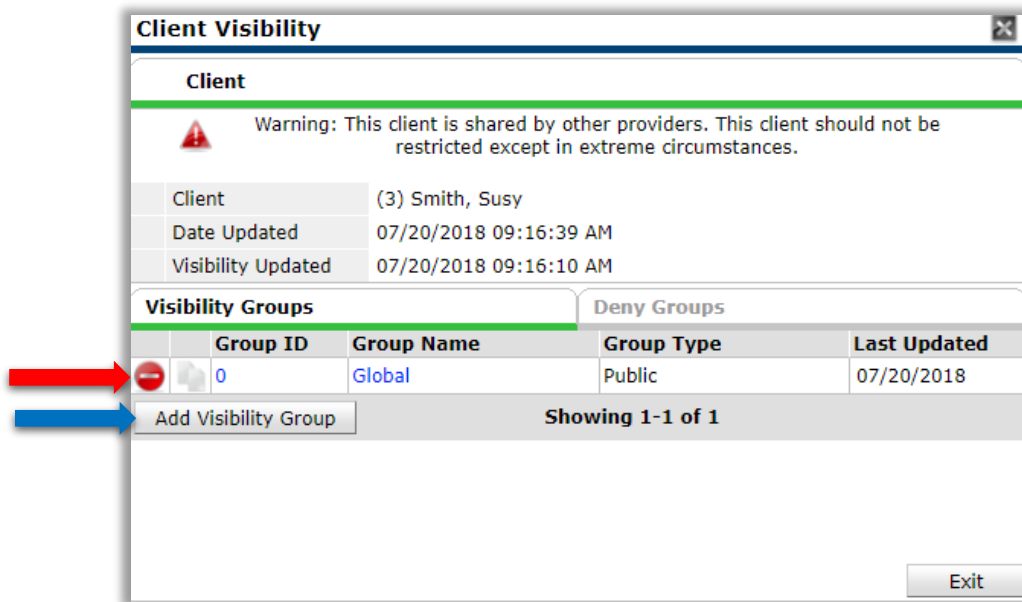
If a client has requested to restrict all data sharing e.g.) client does not wish his name or SSN to be shared, then the client's profile must be locked in HMIS so this data is only visibly to the agency. In case, there would be no need for the ROI Permission to entered. If you have questions regarding locking client profile, please submit a case to CTA (click [HERE](#)).

To lock a client profile to your agency, click on the lock icon on the corner right of the screen (red arrow).



# Client Visibility

**Client Visibility** pop up will appear. To lock the client profile to your provider, remove the 'OpenHMIS' (316) or 'Global' (0) visibility group by clicking the  minus icon (red arrow). Then click on **Add Visibility Group** (blue arrow) and add your respective **Parent Provider** (see list below) with Children Included as a visibility group. Press Exit on that screen now the lock has turned green to red.



## Parent Providers

(140) Central Coast Collaborative on Homelessness
(33) Good Samaritan
(23) Housing Authority of the City of Santa Barbara
(144) Housing Authority of the County of Santa Barbara
(126) Mental Wellness Center
(26) New Beginnings Counseling Center
(20) PathPoint
(31) PATH Santa Barbara
(35) Phoenix of Santa Barbara
(27) The Salvation Army, Santa Barbara
(11) Sanctuary Centers of Santa Barbara, Inc
(13) Santa Barbara Community Housing Corporation
(32) Santa Barbara County Department of Behavioral Wellness
(21) Santa Ynez Valley People Helping People
(9) Sarah House Santa Barbara
(2) Transition House-2
(131) United Way Northern Santa Barbara County
(15) WillBridge of Santa Barbara, Inc.
(103) Youth and Family Services YMCA