



Homeless Management Information System

Santa Cruz County Continuum of Care

Clarity HMIS Managing ROI



© Community Technology Alliance
75 E Santa Clara Street, Suite 600
San José, CA 95113
Phone 408.437.8800 • Fax 408.437.9169

Editing Old ROI

If an agency has an updated ROI signed by the client, and wish to update the file in HMIS Clarity, users will need to click the shield icon, (red arrow) then click the edit icon next to the active ROI (blue arrow). As a reminder, Release of Information is valid for three years and only one valid ROI is needed.

The screenshot shows the HMIS Clarity interface for 'Client A.'. The top navigation bar includes 'PROFILE HISTORY PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION', a search bar, and a 'CASELOAD' button. The main content area is divided into two sections: 'PRIVACY' and 'RELEASE OF INFORMATION'.

PRIVACY Section: Shows 'Client Privacy' with 'Public' selected over 'Private'. There are 'SAVE CHANGES' and 'CANCEL' buttons.

RELEASE OF INFORMATION Section: Features a table with the following data:

Permission	Type	Start Date	End Date
Yes **CTA New User Training**	Electronic Signature	05/01/2019	05/01/2022

Annotations: A red arrow points to a shield icon in the 'Household Members' section, and a blue arrow points to an edit icon in the 'RELEASE OF INFORMATION' table.

Editing Old ROI- Continued

After clicking edit, enter an End Date one day prior to the new signed ROI. For example, Client A signed a new ROI on September 30, 2019. The Clarity user would then edit the current active ROI and enter an end date of September 29, 2019 then click *Save Changes* (see image below).

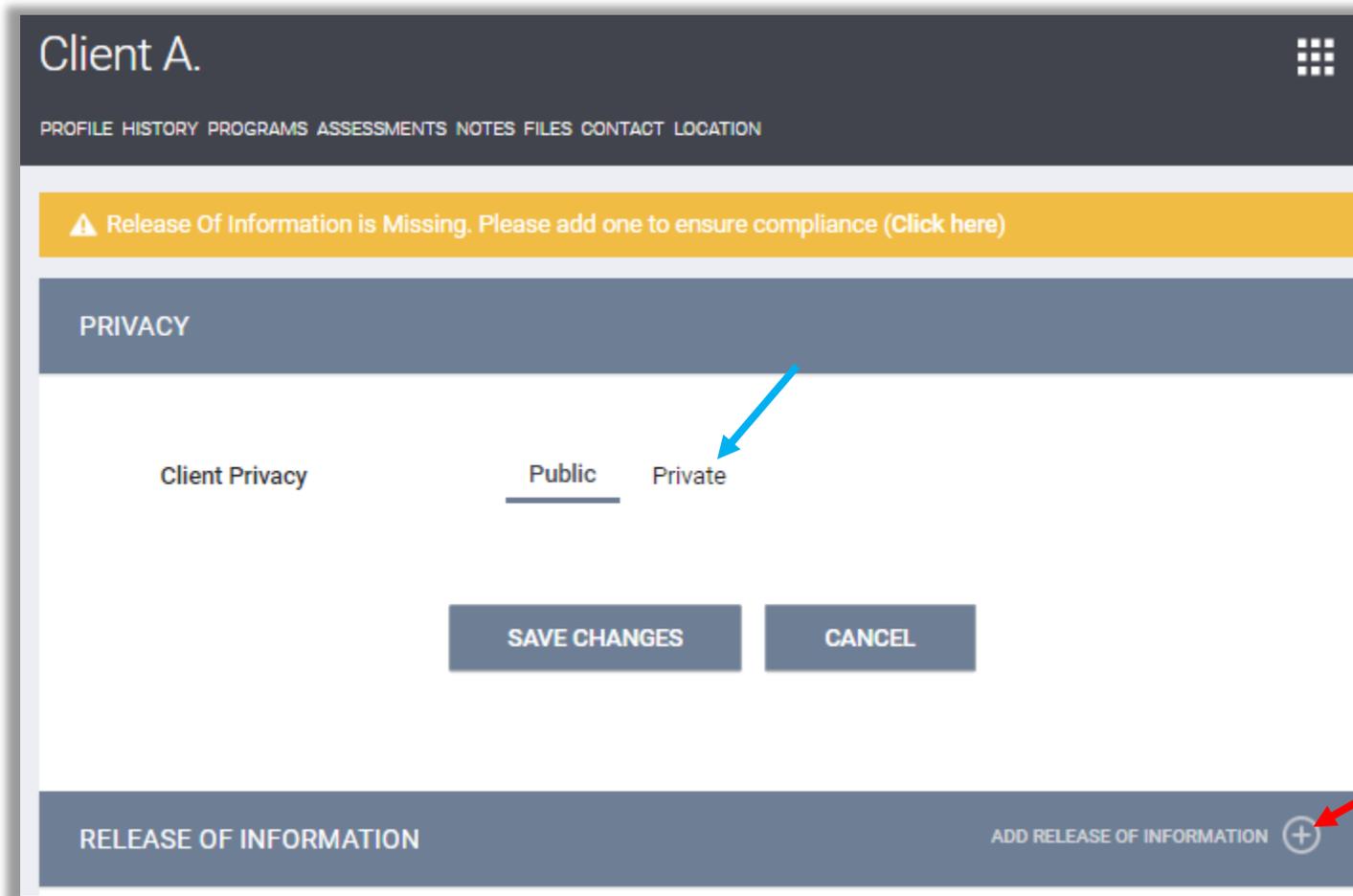
The screenshot displays a form titled "RELEASE OF INFORMATION" with the following fields and values:

Field	Value
Permission	Yes
Start Date	05/01/2019
End Date	09/29/2019
Documentation	
Agency Name	
Staff Name	
Date Entered	

At the bottom of the form, there are three buttons: "E-SIGN DOCUMENT", "SAVE CHANGES", and "CANCEL". A red arrow points to the "SAVE CHANGES" button.

Adding New ROI

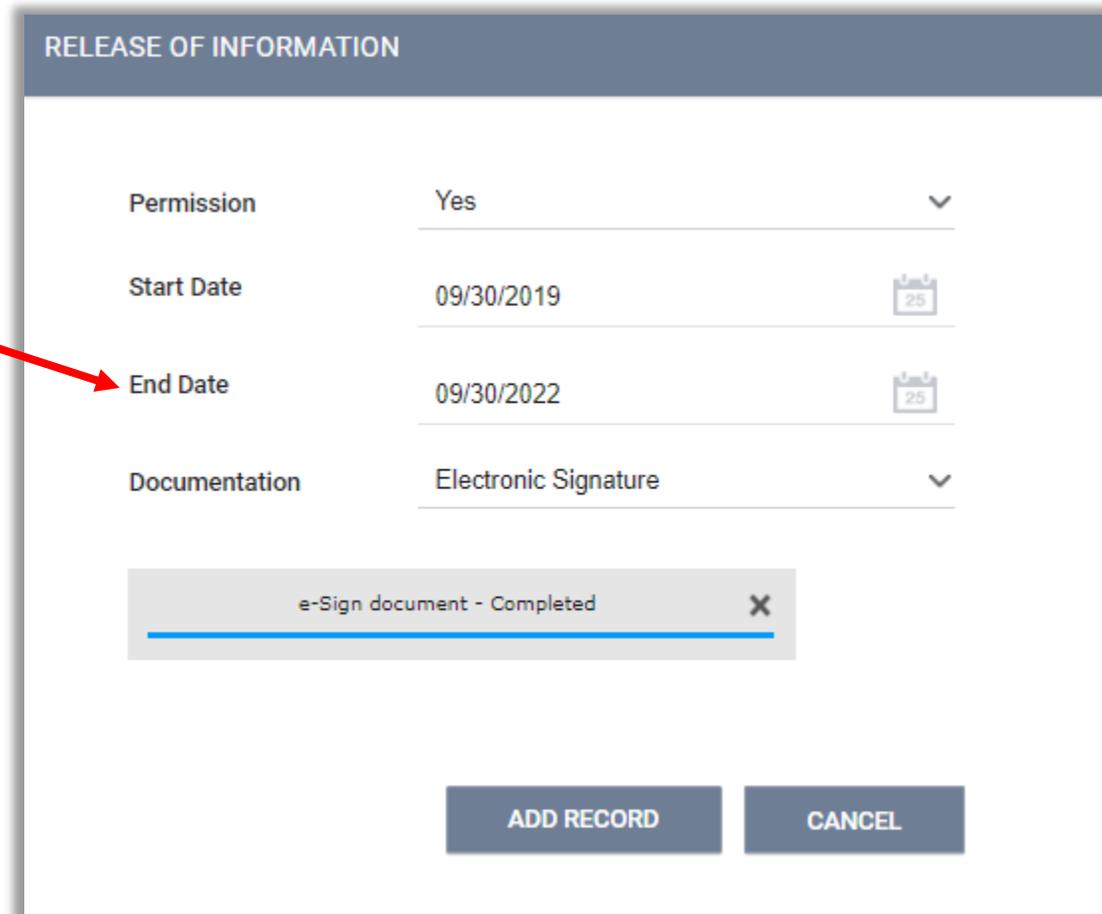
After Clarity user has entered the End Date for the old ROI, you will see a yellow banner at the top of the client page. This is a compliance warning reminding users to enter a client ROI. Click *Add Release of Information* (red arrow) to enter a new ROI. As reminder, if the client has changed their answer from YES to No, Privacy Management is authorized to the Agency that created the Client and will not allow you to change the client's privacy (blue arrow).



The screenshot displays the 'Client A.' interface. At the top, there is a navigation bar with 'Client A.' and a grid icon. Below this is a sub-navigation bar with links: 'PROFILE HISTORY PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION'. A yellow banner with a warning icon and text reads: 'Release Of Information is Missing. Please add one to ensure compliance (Click here)'. Below the banner is a 'PRIVACY' section. Under 'Client Privacy', there are two radio button options: 'Public' (which is selected) and 'Private'. A blue arrow points to the 'Private' option. Below these options are two buttons: 'SAVE CHANGES' and 'CANCEL'. At the bottom of the interface, there is a 'RELEASE OF INFORMATION' section with a button labeled 'ADD RELEASE OF INFORMATION' and a plus sign icon. A red arrow points to this plus sign icon.

Adding New ROI- Continued

In the Release of Information add page, users will select the *Permission: Yes* or *No*, based on the client's answer. The user will then enter the start date, the date the client signed the ROI. Let's continue with our example from above: Client A signed the new ROI on September 30, 2019, we will enter this on the *Start Date* area. Once the user enters a start date, it will default to the expiration date (+3 years from the start date); in our example this will be September 30, 2022 (red arrow). Select a *Documentation* type, then click *Add Record*.



The screenshot displays a web form titled "RELEASE OF INFORMATION". It contains four main input fields, each with a label on the left and a value on the right. The "Permission" field is set to "Yes". The "Start Date" field is set to "09/30/2019". The "End Date" field is set to "09/30/2022", with a red arrow pointing to it from the left. The "Documentation" field is set to "Electronic Signature". Below these fields is a progress bar labeled "e-Sign document - Completed" with a close button (X). At the bottom of the form are two buttons: "ADD RECORD" and "CANCEL".

Permission	Yes
Start Date	09/30/2019
End Date	09/30/2022
Documentation	Electronic Signature

e-Sign document - Completed

ADD RECORD CANCEL