Homeless Management Information System

Santa Cruz County Continuum of Care

Clarity HMIS

Managing ROI

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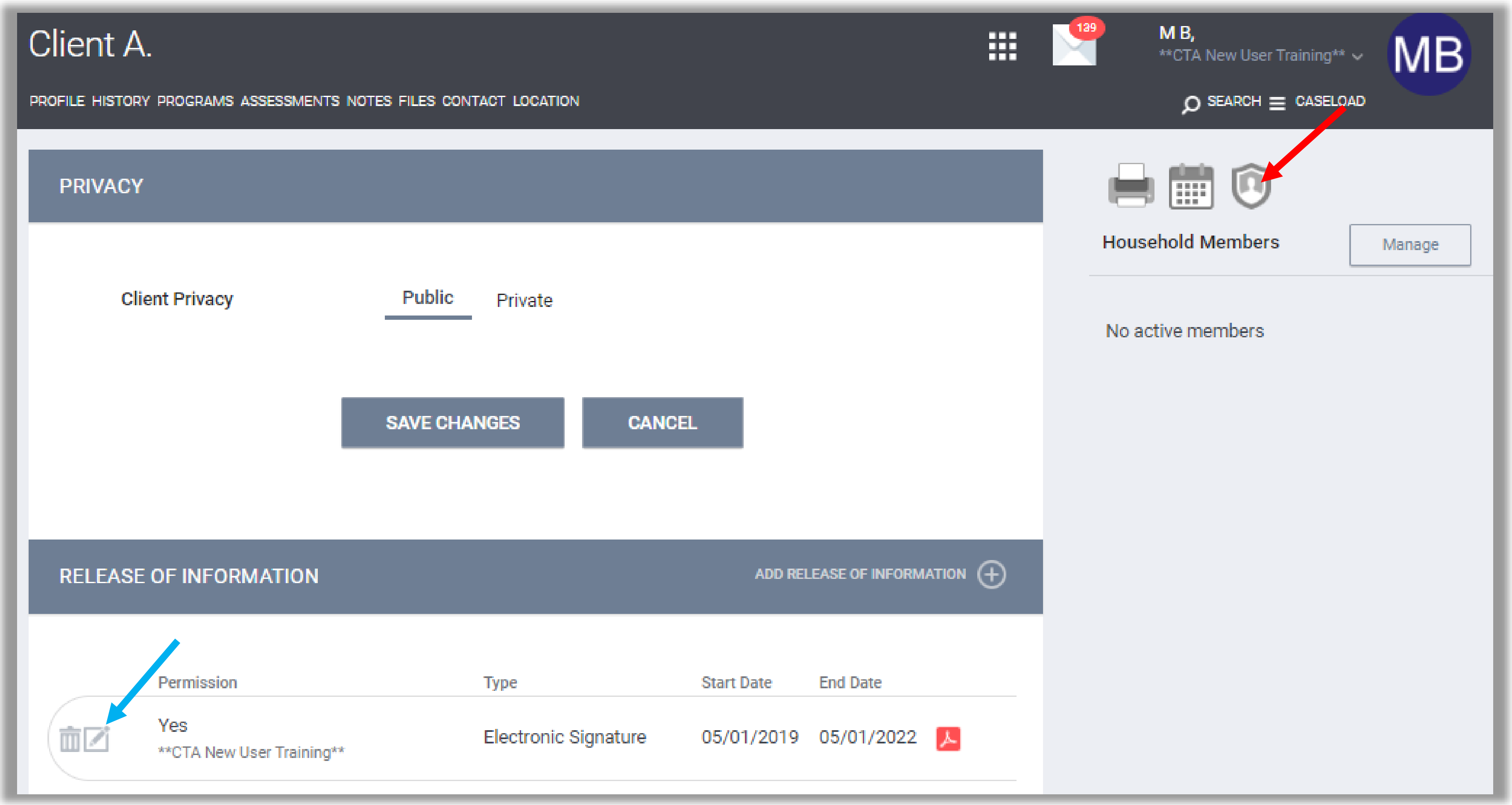
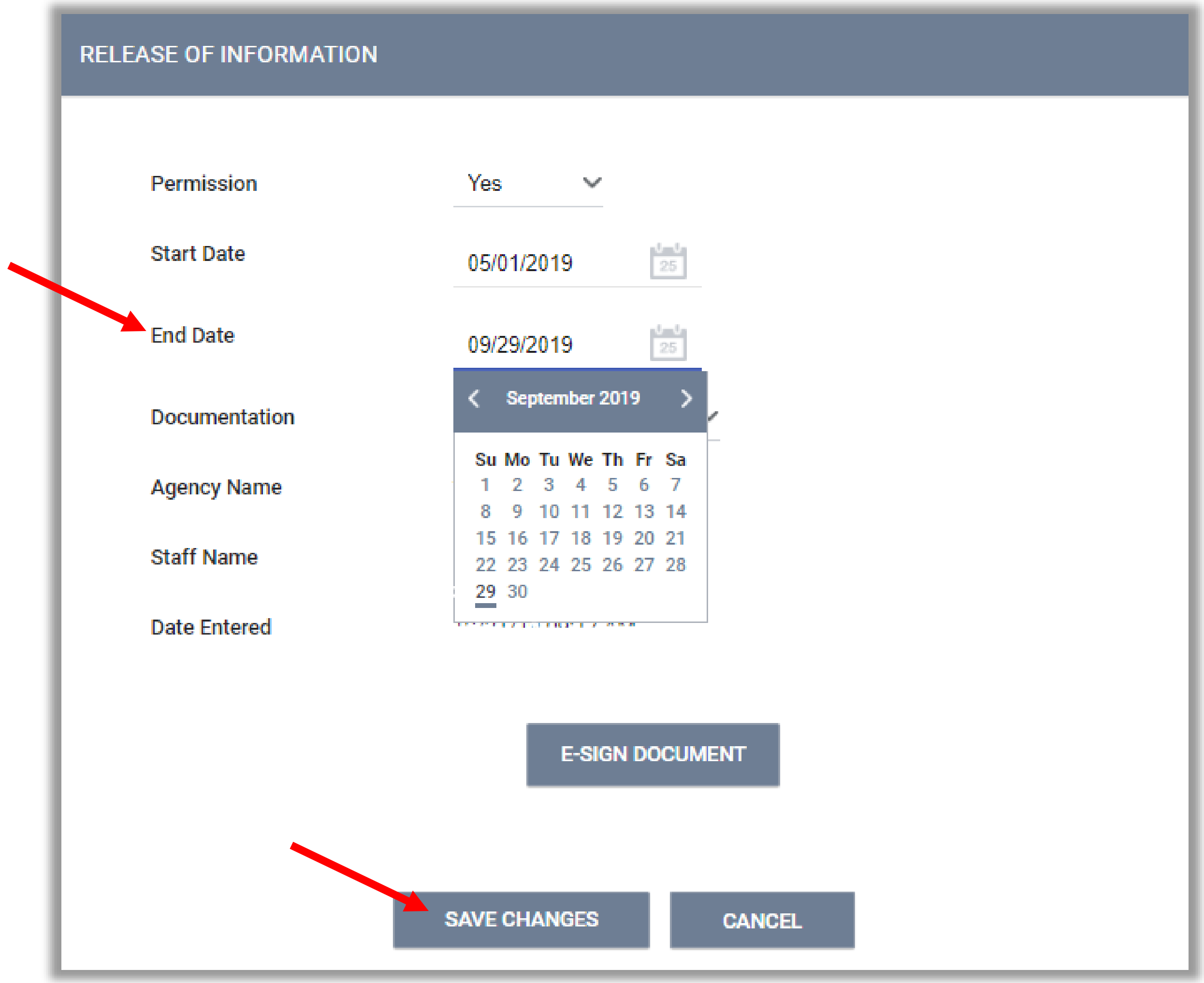
Editing Old ROI

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.



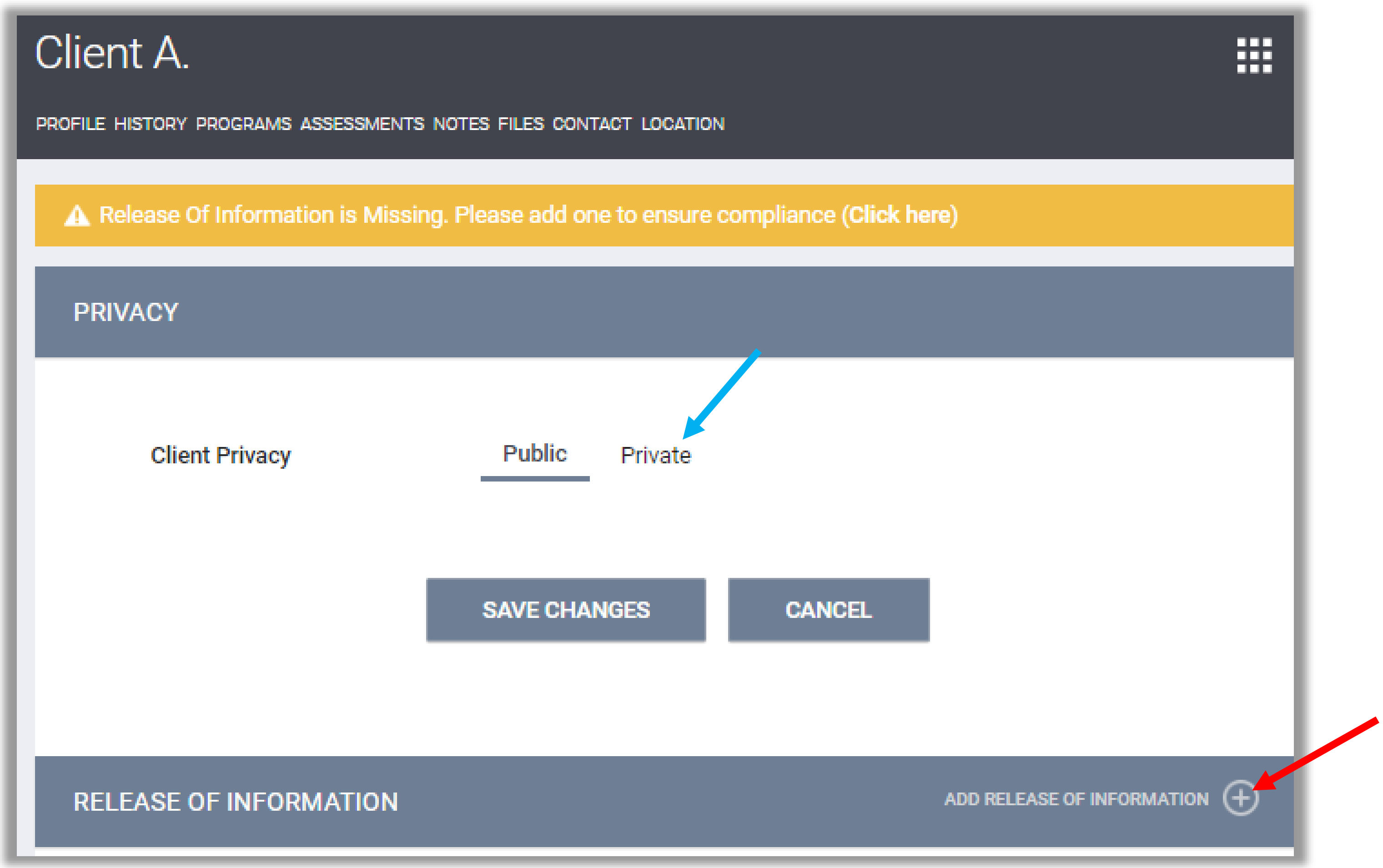
Editing Old ROI- Continued

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).



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).



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.*