

# GUIDE TO CHECKING FOR A PRE-EXISTING ROI AND ADDING A NEW ROI IN HMIS

## Intro





If you are working with a client that already exists in HMIS, there may be a valid Release of Information (ROI) uploaded with the client's consent option documented. If that's the case, so long as the client is not changing their consent option, you do not need to have the client re-sign a new ROI. It is important to add this step to your workflow and make sure and check these spots in HMIS before entering your new client's information in HMIS. All clients must have an active and up to date ROI before you begin data entry in HMIS for the client.

## Intent of Guide

This guide is intended to standardize the ROI workflow in HMIS, help End Users check the proper places to existing ROIs, and upload an ROI if another is not found or not valid in HMIS.

**Step One: Start by checking for an existing ROI** on the **Client Profile** tab.

1. Scroll down to the view any File Attachments- check to see if an attachment is a pre-existing ROI.

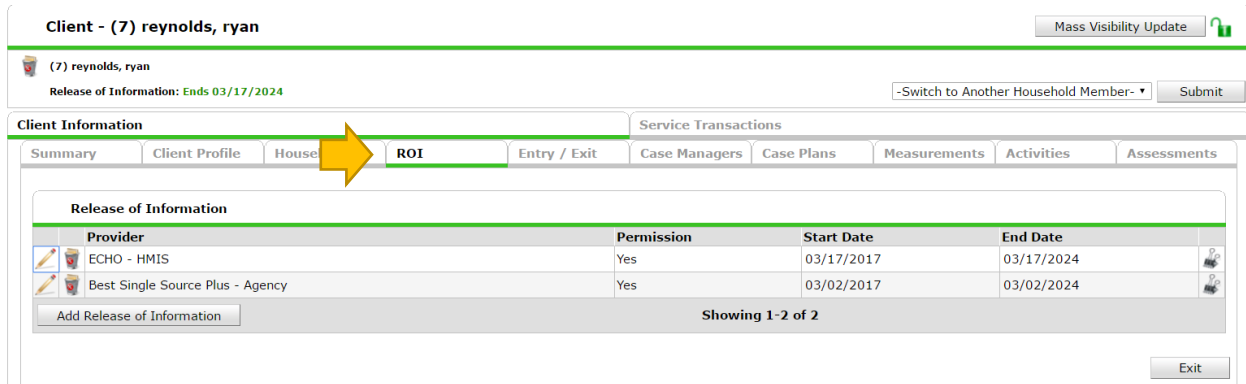
File Attachments						
	Date Added ▾	Name	Description	Type	Provider	Added From
  	03/23/2017	dpatel.test.ROI3.23.17.docx	dpatel ROI	docx	ECHO - HMIS	Client Profile 
Add New File Attachment		Showing 1-1 of 1				

2. If you see one, click the magnifying glass to view the document uploaded. You need to check to make sure it is signed by all applicable parties and still in date. Every adult client needs an uploaded ROI in HMIS. Children (17 and under) should be covered on their Head of Household's ROI. If a valid (in date, consent option not changing) ROI already exists, ECHO does not require that you have the client re-sign the ROI. But, you do need to verify that you confirmed an ROI was on file before entering client data in HMIS.

**Note:** *If you are the first one working with a client and/or you do not see a file attachment in the client profile tab- you need to upload and ROI and if the padlock is red/locked, unlock the padlock to share globally. Please see the steps below for uploading a new ROI.*

## Step Two: Document verification of the existing ROI. Go to the ROI tab.

1. Go to the ROI Tab.



Client - (7) reynolds, ryan Mass Visibility Update

(7) reynolds, ryan -Switch to Another Household Member- Submit

Release of Information: Ends 03/17/2024

**Client Information** | Service Transactions

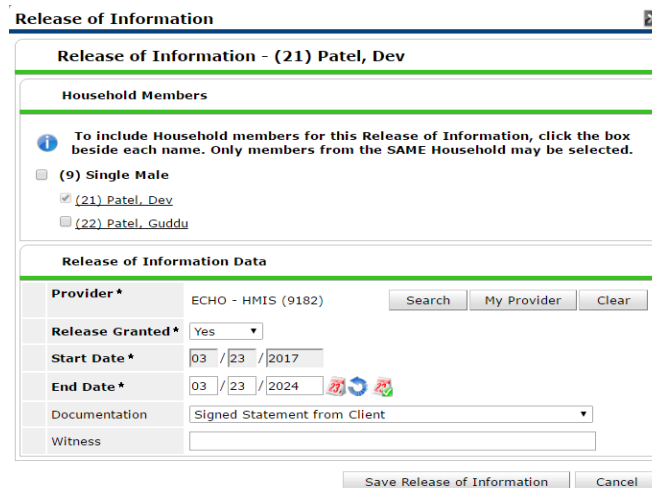
Summary | Client Profile | Household | **ROI** | Entry / Exit | Case Managers | Case Plans | Measurements | Activities | Assessments

**Release of Information**

Provider	Permission	Start Date	End Date
ECHO - HMIS	Yes	03/17/2017	03/17/2024
Best Single Source Plus - Agency	Yes	03/02/2017	03/02/2024

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2. To **document that you have verified** the existing ROI as valid, you will need to click the Add Release of Information button and follow these prompts (shown in the screenshot below). Be sure to fill in all fields before saving the ROI verification.



**Release of Information - (21) Patel, Dev**

**Household Members**

**To include Household members for this Release of Information, click the box beside each name. Only members from the SAME Household may be selected.**

(9) Single Male

(21) Patel, Dev

(22) Patel, Guddu

**Release of Information Data**

**Provider \*** ECHO - HMIS (9182)

**Release Granted \*** Yes

**Start Date \*** 03 / 23 / 2017

**End Date \*** 03 / 23 / 2024

**Documentation** Signed Statement from Client




**Witness**

- **Note:** You can select to add minor household members at the top of the box if this ROI covers minor household members with the Head of Household. If other household members are 18 or older, they must sign their own ROI and this process repeated on their ServicePoint account. When checking for ROIs, be sure to check each household member.
- **Note:** The **Start Date** is the date the ROI was signed. The **End Date** is the expiration date on the ROI (7 years from when it was signed).

### Step Three: Adding a new ROI.

In the following cases, it is necessary to upload a new ROI:

- The client does not already have an ROI attachment uploaded.
  - The client is changing their consent option from a previously uploaded ROI.
  - The existing ROI is out of date (expired).
  - The existing ROI was uploaded before 2014 (old version).
1. Go to the **Client Profile Tab** and scroll down to **File Attachments**. Upload the new ROI here. Description: Client First Initial / Last Name ROI



File Attachments						
	Date Added	Name	Description	Type	Provider	Added From
  	03/24/2017	Client ROI.docx	R Reynolds ROI	docx	ECHO - HMIS	Client Profile
Showing 1-1 of 1						

2. If you should find that the ROI attachment is locked, you need to unlock it so other end users can see it. Click the Red Padlock.
3. Add the “Global” visibility group.

#### File Attachment Visibility




**File Attachment**

File Attachment	(4) Client ROI.docx
Date Updated	03/24/2017 02:59:59 PM
Visibility Updated	Never been set

Visibility Groups		Deny Groups	
Group ID	Group Name	Group Type	Last Updated
  0	Global	Public	03/24/2017

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4. Click Exit. And the Padlock should be “opened” and green now.

File Attachments						
	Date Added	Name	Description	Type	Provider	Added From
  	03/24/2017	Client ROI.docx	R Reynolds ROI	docx	ECHO - HMIS	Client Profile
Showing 1-1 of 1						

5. The final step is to **Verify that the client has a valid ROI** on file by following the prompts outlined in **Step Two** above.

**If you have any questions, submit a Help Desk Ticket to ECHO HMIS:**

<http://austinecho.org/echo-hmis-help-desk-ticket>

