

# HMIS ROI Training

March 2021

# Agenda

- ▶ Importance of the ROI and Considerations
- ▶ Types/lengths of ROI consent
- ▶ Creating a ROI
- ▶ Updating a ROI
- ▶ Questions

# Importance of a ROI and Considerations

- ▶ **Paper ROI:** Must have a paper ROI for each client
  - ▶ It gives the client an understanding of how their data will be accessed
  - ▶ Active for 1 year
    - ▶ Due to COVID, we understand that many interactions with clients are virtual and verbal ROIs are used, but you need to obtain a signed ROI while working with the client
- ▶ **HMIS ROI:** ROIs affect referrals and visibility in HMIS
  - ▶ Referrals will not be available until an ROI is active
  - ▶ Client will not be visible from beyond the enrolled project until an ROI is active
  - ▶ Verbal ROIs are active for 30 day
  - ▶ The project name must match entry project
  - ▶ **DO NOT DELETE OLD/EXPIRED ROIs**

# Creating a ROI

The screenshot shows the ClientPoint Client Search interface. The browser title is "ClientPoint > Client Search". The page has a green header bar with a search box containing "Type here for Global Search" and navigation icons. A left sidebar contains a menu with items: Last Viewed, Favorites (1), Home, ClientPoint, CallPoint, ResourcePoint, FundManager, ShelterPoint, ActivityPoint, SkanPoint, Reports, Admin, and Logout. The main content area is titled "Client Search" and contains a message: "Please Search the System before adding a New Client." Below this is a form with fields for Name (First, Middle, Last, Suffix), Name Data Quality (dropdown), Alias, Social Security Number (masked), Social Security Number Data Quality (dropdown), U.S. Military Veteran? (dropdown), and Exact Match (checkbox). At the bottom of the form are buttons for Search, Clear, Add New Client With This Information, and Add Anonymous Client. Below the form is a section titled "Client Number" with the instruction "Enter or scan a Client ID number to go directly to that Client's profile." and a field for Client ID # 4 with a Submit button. Three red arrows point to the ClientPoint menu item, the Search button, and the Add New Client With This Information button. Red text annotations are placed next to these arrows.

1. Click here for adding a new client

2. Click here when searching for an existing client

3. Click here for adding a new client

Use ClientPoint to create a new client or search for an existing one

# Creating a ROI

The screenshot shows the ClientPoint interface for a client profile. The browser title bar reads "ClientPoint > Client Profile". The page header includes a search bar and navigation icons. The main content area is titled "Client - (4) Solo, Han" and shows "Release of Information: None". Below this, there are tabs for "Client Information" and "Service Transactions". Under "Client Information", there are sub-tabs: "Summary", "Client Profile", "Households", "ROI", "Entry / Exit", "Case Managers", "Case Plans", "Measurements", and "Assessments". The "ROI" tab is selected, and a red arrow labeled "1." points to it. Below the sub-tabs, there is a "Release of Information" section with a table. The table has columns for "Provider", "Permission", "Start Date", and "End Date". A red arrow labeled "2." points to the "Add Release of Information" button in the table. The table currently displays "No matches." and an "Exit" button is located at the bottom right of the section.

1. Click the ROI tab
2. Click the “Add Release of Information”

# Creating a ROI

**Release of Information**

**Release of Information - (4) Solo, Han**

**Household Members**








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

(129114) Single Parent

(4) Solo, Han

(490397) Test, CCP

**Release of Information Data**

<b>Provider *</b>	Passage Home - Wake County - City of Raleigh Homelessness Prevention - City CDBG-CV (8098)	<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
<b>Release Granted *</b>	Yes	
<b>Start Date *</b>	03 / 17 / 2021   	
<b>End Date *</b>	04 / 17 / 2021   	
<b>Documentation</b>	Verbal Consent 	
<b>Witness</b>	ED	

Fill out all required data fields

Considerations:

- ▶ Include all the members of the household
- ▶ The project name must match entry project
- ▶ The type of consent affects the ROI length
- ▶ Add caseworker's initials

Verbal ROI  
is active for  
30 days

# Creating a ROI

The screenshot displays the ClientPoint software interface. The top navigation bar shows 'ClientPoint > Client Profile' and a search bar. A left sidebar contains a menu with options like 'Home', 'ClientPoint', 'CallPoint', 'ResourcePoint', 'FundManager', 'ShelterPoint', 'ActivityPoint', 'SkanPoint', 'Reports', 'Admin', and 'Logout'. The main content area is titled 'Client - (4) Solo, Han' and includes a 'Mass Visibility Update' button. Below this, there's a section for 'Client Information' with tabs for 'Summary', 'Client Profile', 'Households', 'ROI', 'Entry / Exit', 'Case Managers', 'Case Plans', 'Measurements', and 'Assessments'. The 'ROI' tab is active, showing a table with one entry:

Provider	Permission	Start Date	End Date
Passage Home - Wake County - City of Raleigh Homelessness Prevention - City CDBG-CV	Yes	03/17/2021	04/17/2021

Below the table, there is an 'Add Release of Information' button and a status indicator 'Showing 1-1 of 1'. An 'Exit' button is located at the bottom right of the ROI section.

The newly created ROI will automatically show up in the ROI tab of the client's profile

# Updating/Adding a ROI

ClientPoint > Client Profile

Client - (4) Solo, Han

(4) Solo, Han  
Release of Information: None

Client Information

Provider	Permission	Start Date	End Date
Passage Home - Wake County - City of Raleigh Homelessness Prevention - City CDBG-CV	Yes	03/17/2021	04/17/2021

Add Release of Information

Showing 1-1 of 1

DO NOT REMOVE OLD/EXPIRED ROI

Click here to add a new ROI

- ▶ On the ROI tab of the Client's profile click "Add Release of Information"
- ▶ DO NOT DELETE OR CHANGE THE DATE OF AN OLD/EXPIRED ROI



# Updating/Adding a ROI

**Release of Information**

**Release of Information - (4) Solo, Han**

**Household Members**

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

**(129114) Single Parent**

(4) Solo, Han

(490397) Test, CCP

**Release of Information Data**

<b>Provider *</b>	Passage Home - Wake County - City of Raleigh Homelessness Prevention - City CDBG-CV (8098)	<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
<b>⚠ Release Granted *</b>	<input type="text" value="Yes"/>	
<b>Start Date *</b>	<input type="text" value="03 / 25 / 2021"/> <input type="button" value="23"/> <input type="button" value="23"/> <input type="button" value="23"/>	
<b>End Date *</b>	<input type="text" value="03 / 25 / 2022"/> <input type="button" value="23"/> <input type="button" value="23"/> <input type="button" value="23"/>	
<b>Documentation</b>	<input type="text" value="Signed Statement from Client"/> <input type="button" value="v"/>	<b>←</b>
<b>Witness</b>	<input type="text" value="ED"/>	

Same steps as before:

- ▶ Include all the members of the household
- ▶ The project name must match entry project
- ▶ The type of consent affects the ROI length
- ▶ Add caseworker's initials
- ▶ Signed ROI will be active for 1 year

Signed  
ROI is  
active for  
1 year

# Updating/Adding a ROI

ClientPoint > Client Profile

Client - (4) Solo, Han

Release of Information: None

Client Information | Service Transactions

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

Attach signed ROI here

Provider	Permission	Start Date	End Date
Passage Home - Wake County - City of Raleigh Homelessness Prevention - City CDBG-CV	Yes	03/25/2021	03/25/2022
Passage Home - Wake County - City of Raleigh Homelessness Prevention - City CDBG-CV	Yes	03/17/2021	04/17/2021

Showing 1-2 of 2

- ▶ Both ROIs are visible
- ▶ Overlapping dates are okay, the signed ROI does not invalidate the verbal one
- ▶ Attach the signed ROI to the client's profile

Questions?

# Thank You!

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