HMIS ROI Training

March 2021

Raleigh/Wake PARTNERSHIP To End Homelessness

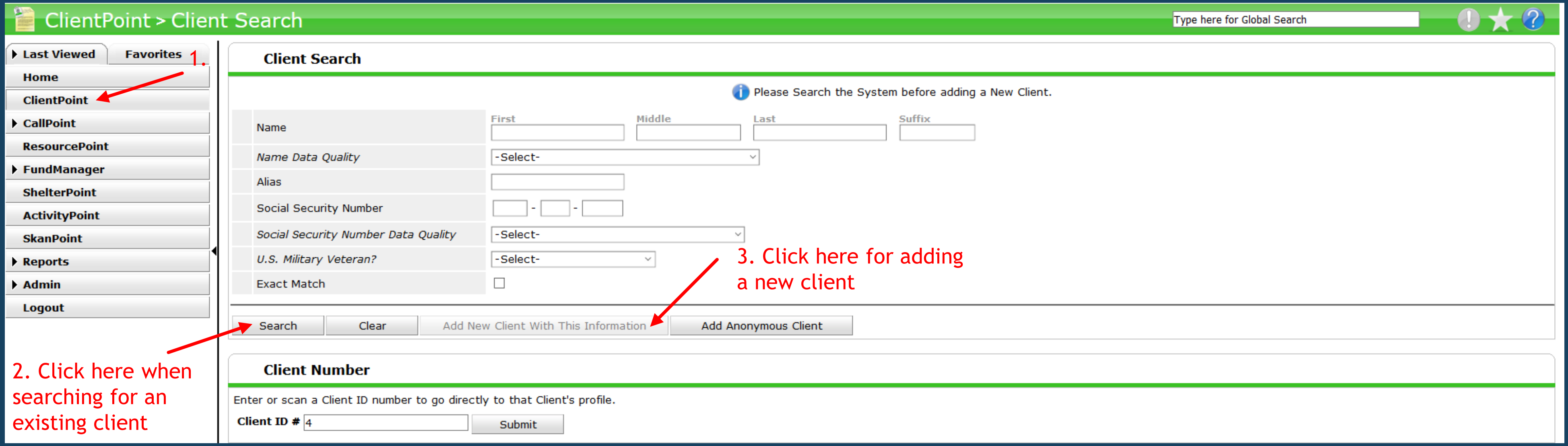
Agenda

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

Importance of a ROI and Considerations

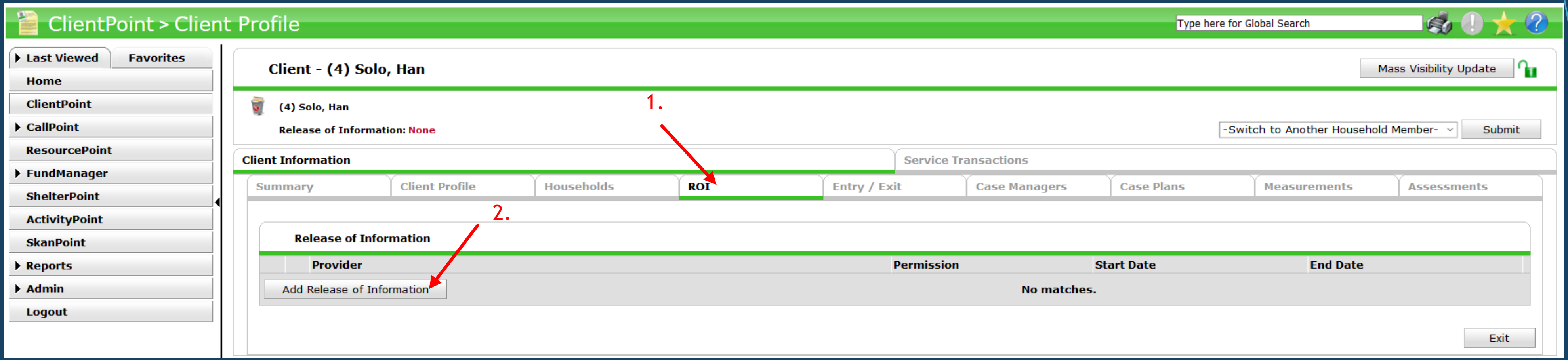
- **Paper ROI:** Must have a paper ROI for each client
  - It gives the client an understanding of how their data will be accessed
  - Active for 1 year
    - Due to COVID, we understand that many interactions with clients are virtual and verbal ROIs are used, but you need to obtain a signed ROI while 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



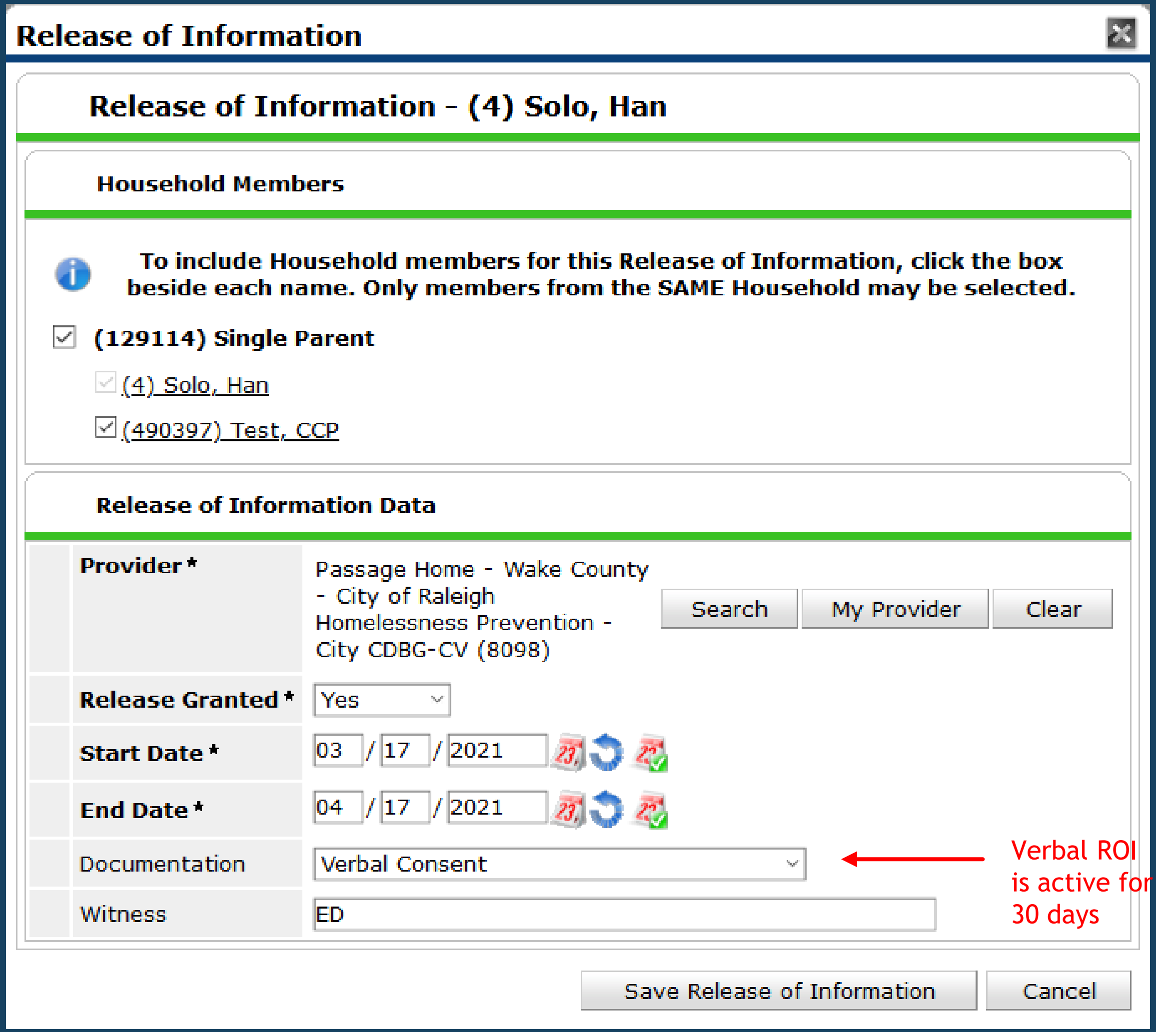
Use ClientPoint to create a new client or search for an existing one

Creating a ROI



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

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

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

Verbal ROI is active for 30 days

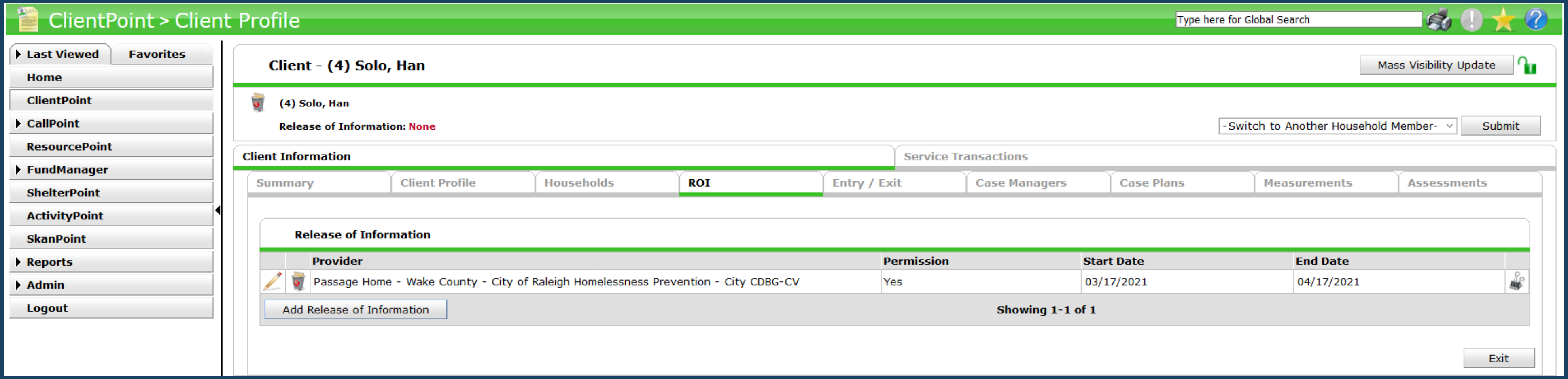
Save Release of Information / Cancel

Fill out all required data fields

Considerations:

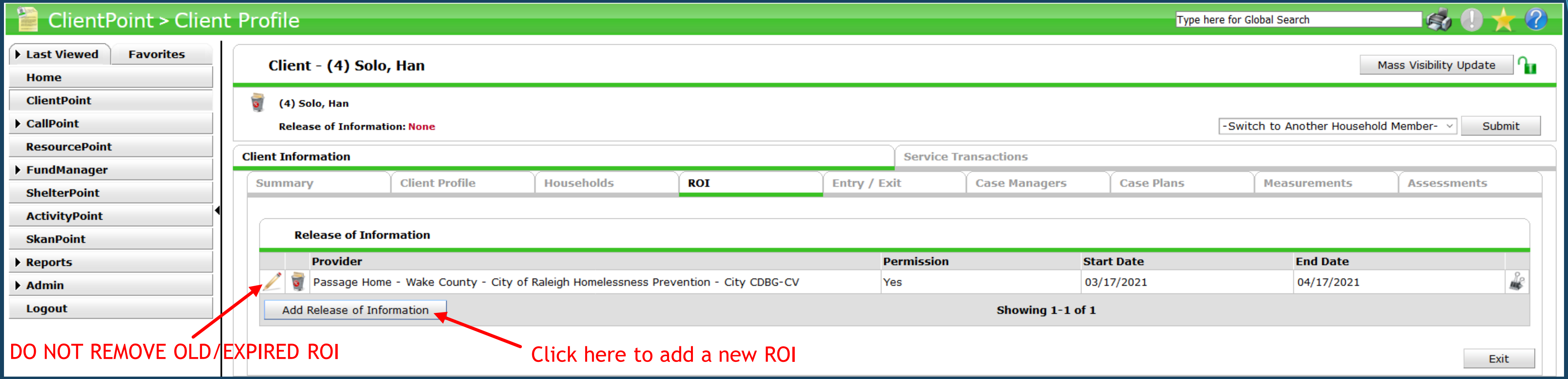
- Include all the members of the household
- The project name must match entry project
- The type of consent affects the ROI length
- Add caseworker’s initials

Creating a ROI



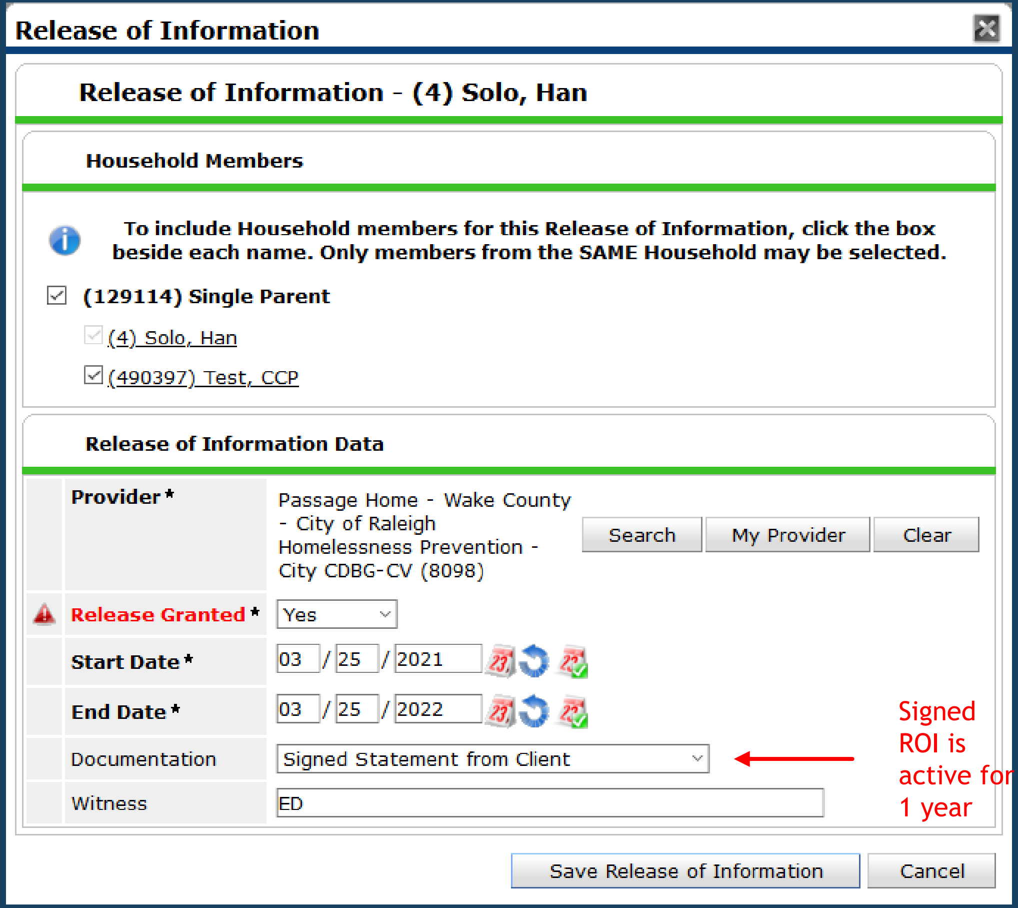
The newly created ROI will automatically show up in the ROI tab of the client's profile

Updating/Adding a 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

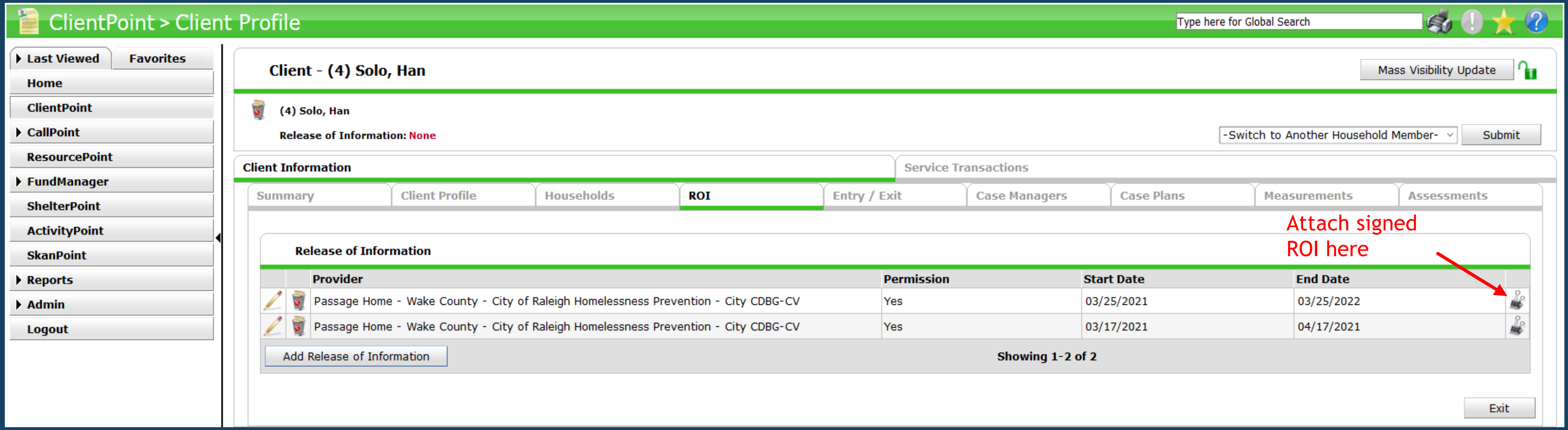
Updating/Adding a ROI



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

Updating/Adding a ROI



- 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!

- hw_hmis@partnershipwake.org
  - 919.443.0098

- Chloe Pearson, Data & Evaluation Specialist
  - cpearson@partnershipwake.org

- Eric Doll, HMIS System Administrator
  - edoll@partnershipwake.org