

1.0 Overview

These work instructions outline the steps for handling a client's Release of Information (ROI) status in ClientPoint.

2.0 Work Instructions

1. Verify ROI status.

- a. If green, no action is needed.
 - i. Green means that the ROI is in place and still valid.
 - ii. Red means that the ROI is either not in place or has expired.
- b. If red, proceed to step 2.

2. If no ROI in place, read client Privacy Script.

a. Example Privacy Script: "To support you best, I need to enter some information into our secure database. Would it be okay if this information is shared with other housing agencies in Clackamas County? If you say No, it will stay confidential within our agency. Allowing your information to be viewed allows us to better serve you. You'll have improved access to services such as basic needs, employment, and housing. This information will help us understand community needs and is used to advocate for more services. If you have any questions or would like a copy of the Privacy Notice, let me know. If you say Yes, it may be shared with other housing agencies, but not with landlords or law enforcement unless they provide a warrant. Your decision won't impact your services. Are you ready to proceed?"

1. Verify ROI status.



The screenshot shows a web interface for a client profile. At the top, there are navigation links for 'CLIENTS' and 'Client Profile'. Below this, the client's name is displayed as 'Client - (60) Doe, John'. Underneath, the client's name '(60) Doe, John' is shown again, followed by the 'Release of Information' status, which is 'Ends 04/23/2034'. This date is highlighted with a red box. Below the status, there is a section titled 'Client Information' with two tabs: 'Summary' and 'Client Profile'.

ROI Status - Work Instructions



- 3. Once client agrees they are ready to get started, proceed to input the ROI.
 - a. Select “Add Release of Information.”
 - b. Select all household members who will be included on your entry.
 - c. The Provider will default to your ADMIN provider. **Do not** change this. This covers the client for all projects at your agency.
 - d. Release Granted will say “Yes” if the client agrees and “no” if they do not agree.
 - e. “Start Date” is the date you read the privacy script.
 - f. “End Date” is 10 years after the Start Date
 - g. Documentation is whatever method you used for client consent.
 - i. Signed documentation is preferred but verbal consent is allowed.
 - h. Enter your full name as the Witness.
 - i. Select “Save Release of Information.”

- 3. Once client agrees they are ready to get started, proceed to input the ROI.

Release of Information - (60) Doe, John

Household Members

This Client is not a member of any Households.

Release of Information Data

Provider *	EPHC (SHS) SSO Navigation Clackamas (8515)	Search	My Provider	Clear
Release Granted *	Yes			
Start Date *	04 / 25 / 2024			
End Date *	04 / 25 / 2034			
Documentation	Signed Statement from Client			
Witness	Marita Gunter			

Save Release of Information Cancel

3.0 Resources

3.1 Referenced Material

- [2024 HUD Data Standards \(linked\)](#)

3.2 Related Material

- [2024 CoC Program HMIS Manual \(linked\)](#)

3.3 Contacts

- [HMISAdmin@clackamas.us \(linked\)](mailto:HMISAdmin@clackamas.us)