ROI Status - Work Instructions

1.0 Overview

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

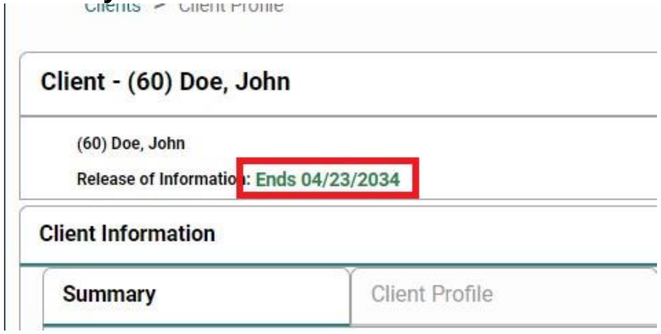
2.0 Work Instructions

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?

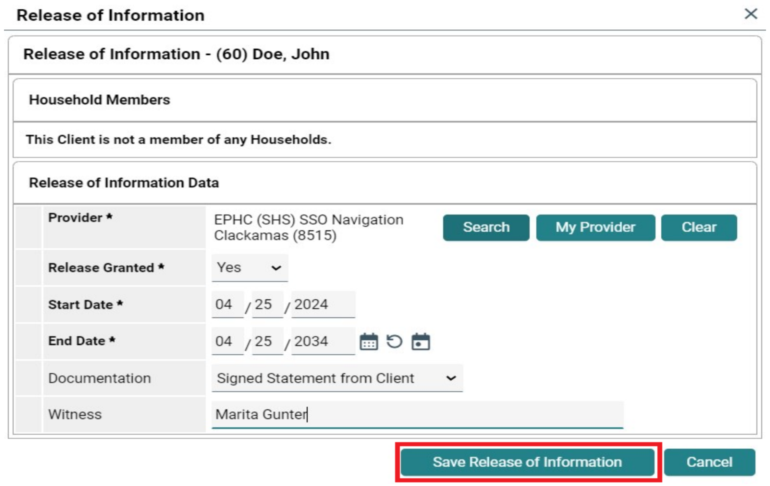
1. Verify ROI status.



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.



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)