

# ADD AN ROI

1000 simple steps (*kidding*)

A Release of Information (ROI) is a new requirement for all Clients in ServicePoint (10/01/2017.)

An ROI is added from the ROI tab in ClientPoint on the **Client Information** screen /Client Summary.

➔ *Be sure you are not in EDA mode! If you are, you won't see all your Providers. **No more EDA mode please!***

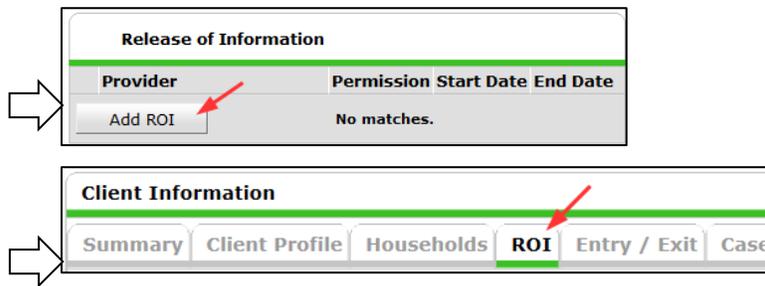
1. Check the ROI dashlet on the Client Summary page. Create new ROIs if they are missing or if the Client has changed their permission from a No to a Yes or vice versa. *You will only see you own agency's ROIs.*



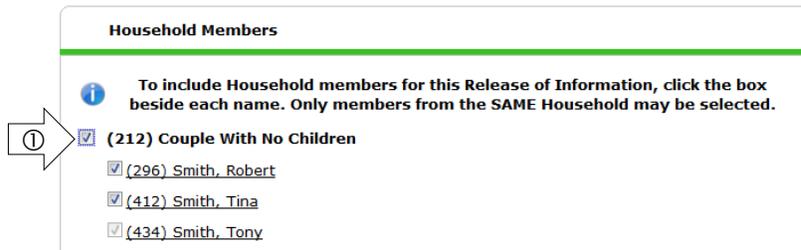
Release of Information				
Provider	Permission	Start Date	End Date	
SVDP - Social Services	Yes	08/11/2011	10/02/2027	
SVDP - Singles Overnight Parking SPRFLD-SHELTERPOINT	Yes	08/11/2011	10/02/2027	
SVDP - Second Chance Renter Ed.	Yes	08/11/2011	10/02/2027	
Lindholm Ctr ESS - CE Front Door (Assessor & Provider)	Yes	08/11/2011	10/02/2027	
SVDP - OHCS - ESG-RRH for SINGLES	Yes	08/11/2011	10/02/2027	
SVDP - VOC SWEX-CW	Yes	08/11/2011	10/02/2027	

Add ROI      Showing 1-6 of 19      First Previous Next Last

2. Page down on the Client Summary and find the Release of Information “dashlet” **or** click on the ROI in the Client Information Section.



3. Click **Add Release of Information**. The **Release of Information** window will display.



➔ If the ROI will cover other members of the client's household, click the checkboxes next to the clients' names in the **Household Members** section. This will be on the “Client Consent to Release Information for Data Sharing in Lane County” form.

*NOTE- a child <18 years old who is the Head of Household or an unaccompanied youth can't legally agree to release their information to other Agencies. Therefore, complete the ROI with Release Grant – NO. Set the end date to their 18<sup>th</sup> birth day.*

② **Provider \*** - You must click on **Search** to see all your Providers (defaults to your ADMIN level provider)

Provider Search Results													
#	A	B	C	D	E	F	G	H	I	J	K	L	M
	<b>Provider</b>												
													<b>Level</b>
+													Level 4
+													Level 4
+													Level 4

Select all the **Providers** in your list for the ROI. *Some of you have more than 20 Providers so you will to do this step twice.*

③ **Release Granted** - Indicate whether or not the client granted the ROI by making a selection from the **Release Granted** pick list. This will be on the “Client Consent to Release ...” form.

④ **Start Date** - If the ROI permission is  **Yes** then use Lane County’s implementation date (08/01/2011) as the Start Date for the ROI

**Start Date = 08/01/2011**

This makes sure that previously open information/data stays open!

*Example when the permission is  **Yes***

If the ROI permission is  **No** then use the date the client signed the ROI

⑤ **End Date** - Enter the **End Date** for the ROI.

If the ROI permission is  **Yes** then you can make use the date 10 years from TODAY’s date or less if your Agency decided to make the ROI’s active for a shorter period.

If the ROI permission is  **No** you could choose an end date out only one year. At the end of the ROI, you will be prompted to ask the client if they would like to share their information so they could be eligible for shared projects.

*Note: Once data has an ROI, it always has the (Yes or No) ROI. Any NEW data added after the ROI End Date will NOT be affected by the old ROI. For example: Answer 'A' in an assessment was entered 06/01/2015 and is "Yes" and has a Yes ROI associated with it which ends 12/31/2015. Answer 'A' has another entry of "No" dated 01/01/2016. It is now 10/01/2017, if someone looked at Answer 'A' they would see "Yes."*

⑥ **Documentation** - Indicate the type of ROI consent by making a selection from the **Documentation** pick list and choose “signed documentation on file”.

The document you collect is the “Client Consent to Release Information for Data Sharing in Lane County” form. You need to maintain this record in hard copy or electronically for 10 years. These documents may be audited.

⑦ **Witness** - If there was a witness to the client’s consent to the ROI, then enter that person’s name in the **Witness** text field. This is not required to create an ROI.

⑧ Click **Save Release of Information**. The window will refresh to the **Release of Information** screen. The new ROI will be listed.

- Click **Exit** to return to the **Client Profile**

Release of Information				
Provider	Permission	Start Date	End Date	
  CCS - McKenzie CoC-RRH	Yes	09/18/2017	09/18/2024	

Add Release of Information

Showing 1-1 of 1

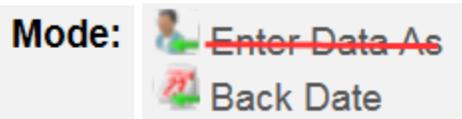
Exit

## About ROIs

- The ROI will allow other agencies (and sometimes your own agency) to see entry/exits and service transactions entered on or after 10/02/2017.
- If you forget to create an ROI, other agencies will not know that the household received a food box, was housed, was entered into a street outreach project, etc.
- If you forget to create an ROI, the data you enter on this household in the entry assessment will NOT roll forward to the next entry/exit assessment.
- The ROI will ensure that older (pre 10/2/2017) data will remain visible to you and other agencies.
- If the ROI permission is not granted (a No response) then other agencies will not see your Entry/Exits or service transactions. The data will not roll forward to the next assessment. The client will not be eligible for any multi-agency collaboration such as Coordinated Entry, FUSE, or the Homeless Veteran By Name-List.

## TIPS

- Do not use the “Enter Data As” mode for data entry ANYMORE *(unless you have special circumstances)*



- Search and Select all the Providers in your list for every ROI you create
- Back date the ROI to **08/01/2011** if the client gives permission to share (a Yes)  
*BRAND NEW client records can have the ROI start date equal to the date you create the new client record- but it doesn't create a data problem if you back date to 08/01/2011 as a rule.*
- The ROI doesn't impact the sharing of basic Client data (name, Social Security Number or veteran status) which is always visible regardless of the ROI situation. Unfortunately client date of birth is not visible without the ROI.
- Watch the 11 minute video on ROIs. It really does cover this information.

<https://www.youtube.com/watch?v=A6YYacA-sd4&feature=youtu.be>

