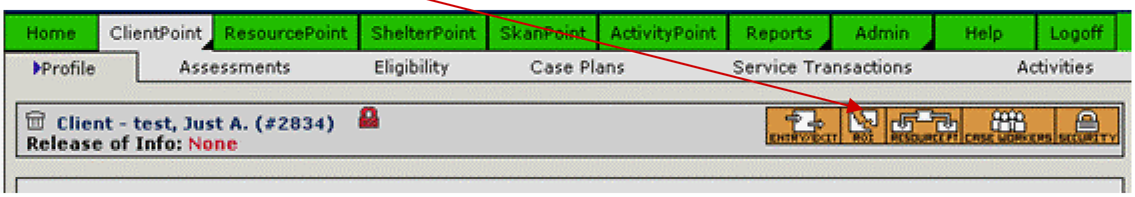
# RELEASE OF INFORMATION ( ROI)

A Release of Information (ROI) is required to share client information with other providers in your community. As of March 1, 2010 everything but AIDS/HIV, mental health and entry exit information will be shared. **Make sure to create household members before creating an ROI, so that you can record the ROI for all family members at one time.**

## To Add an ROI:

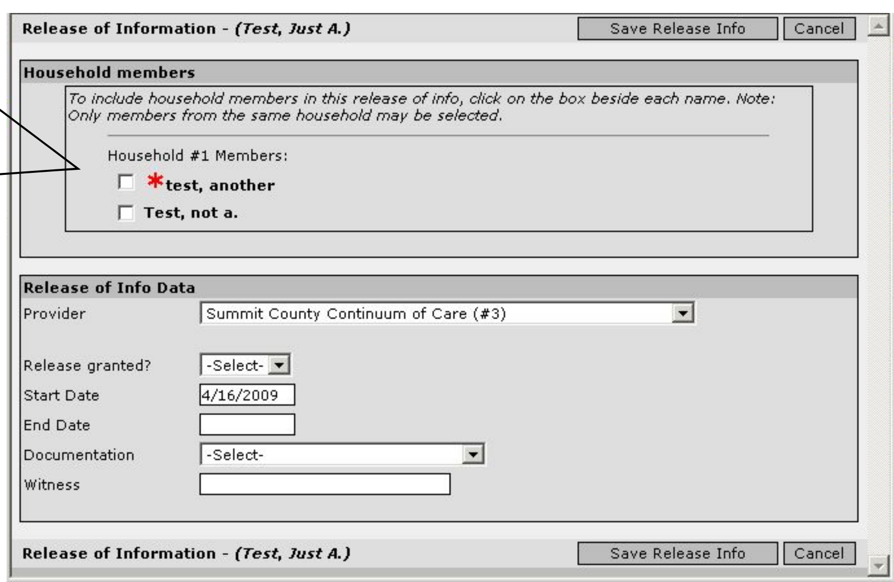
1. View the client's record, also called a client profile.
2. Click the orange **ROI** button.




The **Release of Information** window will display.


3. Click the **Add Release** button and the **Release of Info Data** window will display.

If the ROI will cover other members of the client's household, click the check boxes next to the client's names in the **Household Members** section.



Select the provider that issued the ROI from the **Provider** picklist.

Indicate whether or not the client granted the ROI from the **Release granted?** picklist.

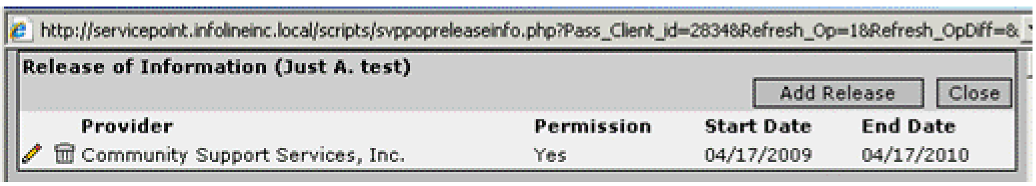
Enter the **Start Date** for the ROI in mm/dd/yyyy format. This is the date that the client's information will be available to outside providers.

Enter the **End Date** for the ROI in mm/dd/yyyy format. After this date providers will no longer be able to view the client's data.

Choose the type of ROI consent from the **Documentation** picklist.

If there was a witness to the client's consent to the ROI, then enter that person's name in the **Witness** text field.

Click **Save Release Info**. The **Release of Information** screen will display with the new ROI.

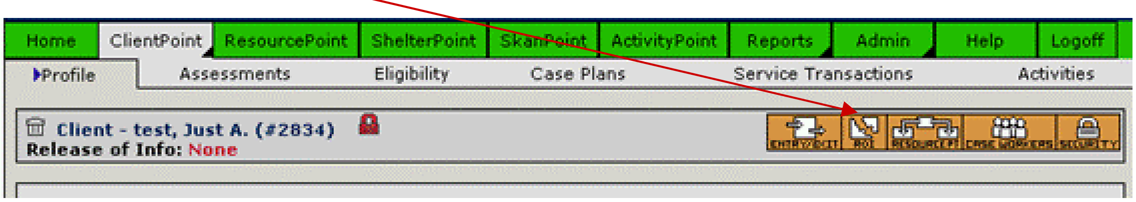



4. Click **Close** to return to the client profile.

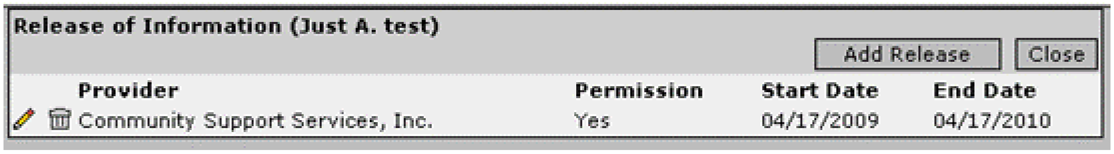
## To Edit or Delete an ROI:

1. View the client's record, also called a client profile.

2. Click the orange **ROI** button.




The Release of Information window on the next page will display.




***To Edit an ROI:*** Click the **pencil icon.** The screen will refresh and display the client's ROI data. Make the desired changes. Click **Save Release Info**. The screen will refresh and display the **Release of Information** screen.

***To Delete an ROI***: Click the **trash can icon**. A warning window will display asking the following, "Are you sure you want to delete this release of info?" Click **OK** to continue. The **Release of Information** window will refresh and the ROI will no longer be listed.

3. Click **Close** to return to the Client Profile.

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