How to Add a Release of Information (ROI)

There are 2 types of Release of Information (ROI)'s:

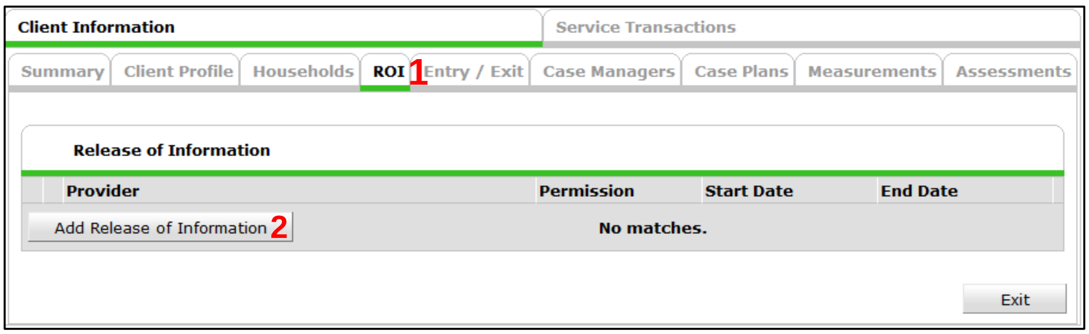
1. **External ROI** – A formal ROI document must be signed by the client in order to enable data sharing between certain agencies/programs.

2. **Internal ROI** – This is used to enable data sharing **WITHIN** your own agency and/or programs and does not require a signed document.

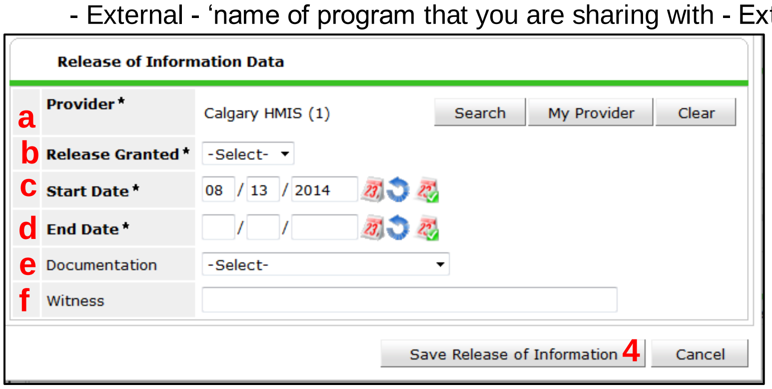
Adding a ROI:

1. Click on the ROI tab

2. Click Add Release of Information



3. Fill in the details on the new window
   a. **Provider** - Confirm Provider is correct
   b. **Release Granted –** has the client provided permission to share information
   c. **Start Date** – Date profile is completed
   d. **End Date** – 3 Years from Start date (unless otherwise instructed by your program)
   e. **Documentation** – Choose the appropriate type of ROI
   f. **Witness -** Internal 'agency name - Internal'
      - External - 'name of program that you are sharing with - External'



4. Click Save Release of Information

Internal ROI Process complete.

External ROI Additional Steps

The external ROI form can be found here :

http://calgaryhomeless.com/wp-content/uploads/2014/05/FOIP-Release-of-Information-ROI-Form.pdf

1. The client will need to fill in and sign the above form
2. Follow steps 1-4 in adding a ROI
3. Scan the signed copy of the external ROI
4. Click the paper clip on the ROI line 
5. Upload signed and scanned ROI
6. Email client ID # and ROI information to hmis@calgaryhomeless.com They will open padlocks so the other agency can see the profile