Adding or Updating a Release of Information

Prior to creating a ONE System record, a client must receive the Homelessness Response System Notice of Privacy Practices and sign or verbally consent to the Homelessness Response System Authorization for Use and Disclosure of Information, or Release of Information (ROI). The Privacy Notice explains how personal information may be used and shared by HSH and its partners. The ROI documents a client's consent to the uses and disclosures described in the Privacy Notice. The current versions of the Privacy Notice and Release of Information forms are posted on the help site.

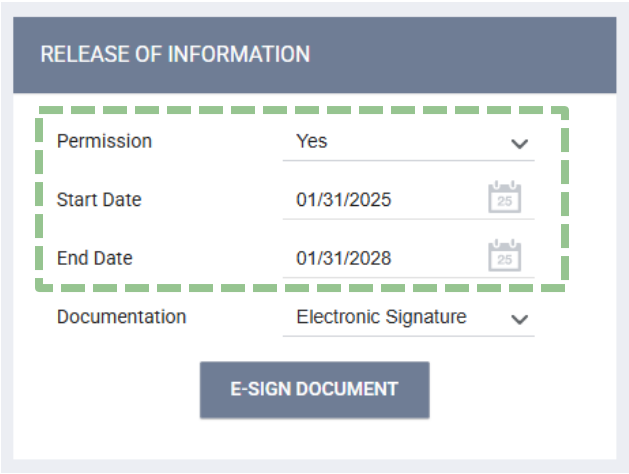
A client's ROI is valid for up to three years from the date it is first acknowledged or signed, and at the point of expiration, a new ROI must be obtained and updated in the client record. A client may also refuse to share information without being denied access to certain emergency services. This right applies only to programs that do not require information to determine eligibility or assess needed services (e.g., drop-in centers, street outreach, and certain services only programs).

Do not upload copies of the Release of Information to the Files section of ONE. Instead, record client consent to share information directly in the ONE System by following the instructions below.

In a new client record

When creating a new client, you must add a Release of Information to save the client record.

On the right side of the profile screen is the Release of Information permissions screen. Fill this out as follows:



Permission: Leave set to Yes. Change to No *only* if client refuses to sign and is seeking services at a low-barrier program. *See "If a client declines to sign an ROI" below for instructions on how to document permission = No for clients who decline to sign an ROI.

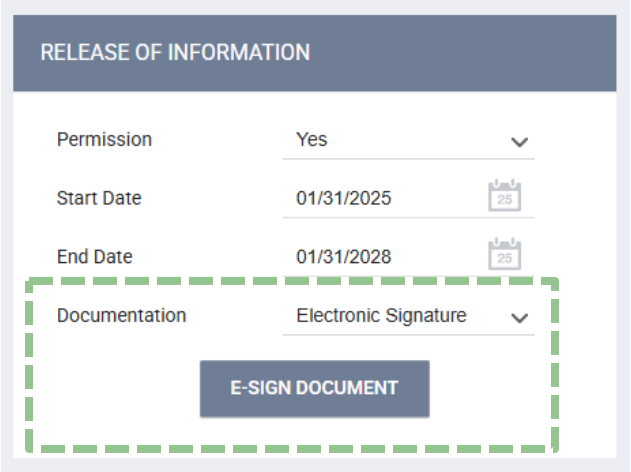
Start Date: Today's date, or date of client's signature on ROI form.

End Date: If permission is yes, defaults to three years from the start date – *do not* change this date unless there is an earlier date specified on the clients release form in the Expiration section.

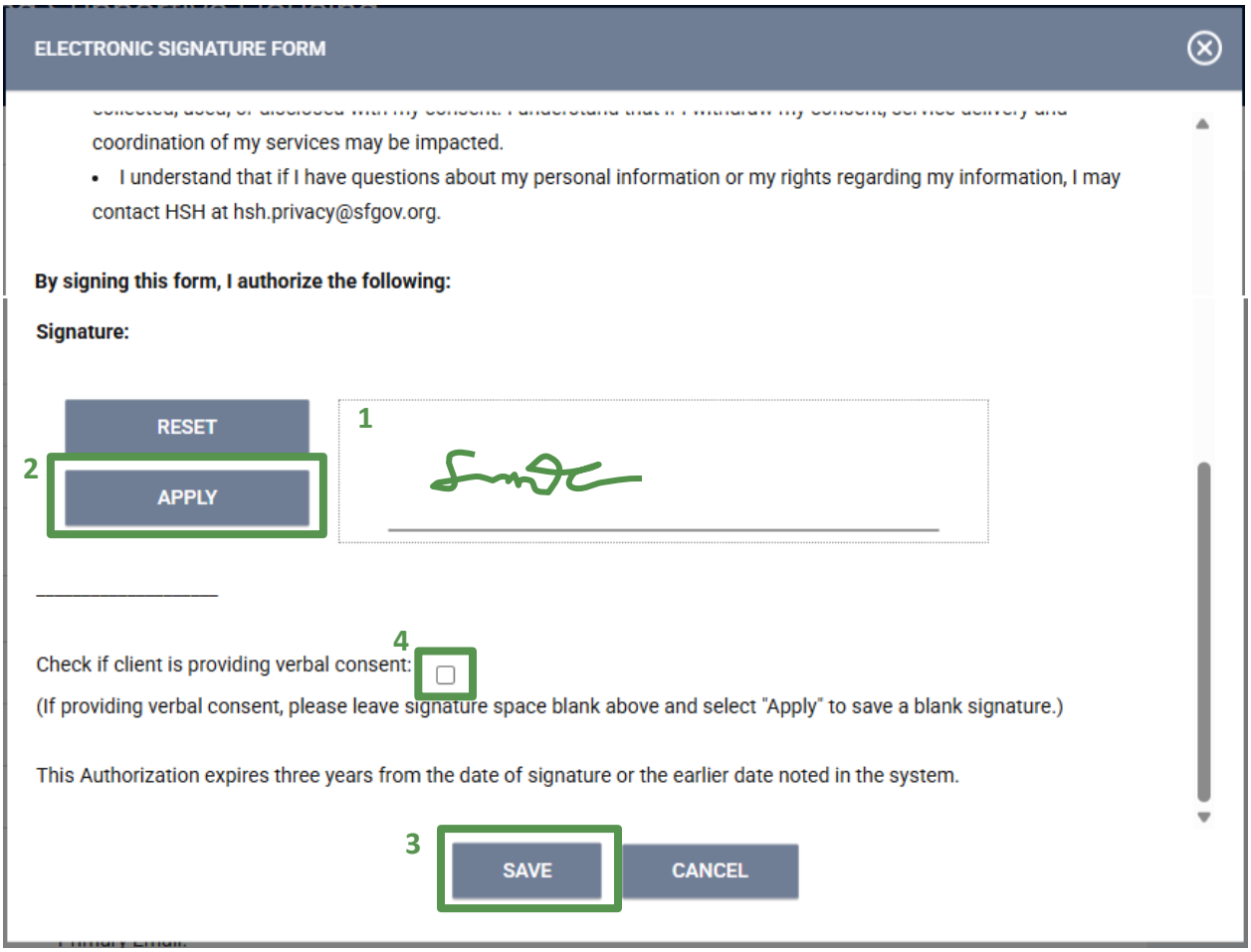
Documentation Options: Select "Electronic Signature" to sign the ROI on-screen. If you are signing on behalf of the client's verbal consent, you may also do this under "Electronic Signature." Otherwise, select "Attached PDF" if you have a signed document to scan and upload into ONE.

Electronic Signature Documentation Option:

After you select "E-Sign Document," a window will appear onscreen with the content of the Release of Information to accept and sign. Scroll up to read the contents of the Authorization for Use and Disclosure of Information.



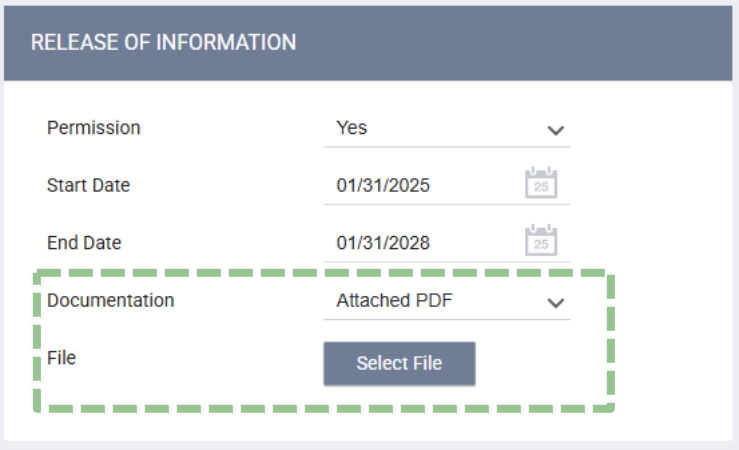
Sign (1) on a touchscreen/pad or with your mouse and hit "Apply" (2) after signing. Then select "Save" (3) to e-sign the ROI. This will create a PDF within the privacy section of the client profile that verifies the client's name and date signed and includes the client's signature.



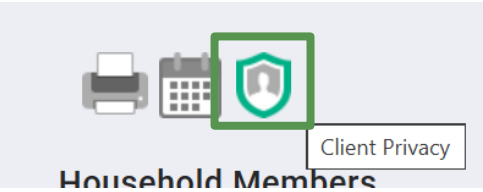
Documenting verbal consent: If a client is providing verbal consent, check the box onscreen that indicates the client is providing verbal consent (4). Do not enter a signature. Save a blank signature by selecting "Apply" (2) before selecting "Save" (3).

Attached PDF Documentation Option:

If you have a signed paper copy of the ROI, choose "Attached PDF" in the Documentation dropdown and upload a copy in the Privacy section by selecting "Select File" and choosing the scanned copy of the document from your device.



Whether choosing electronic signature or attached PDF, this will save a copy of the Release of Information to the Privacy section of the client record, which you can access by clicking on the privacy shield on the right-hand side of the Profile tab.



If a client declines to sign an ROI

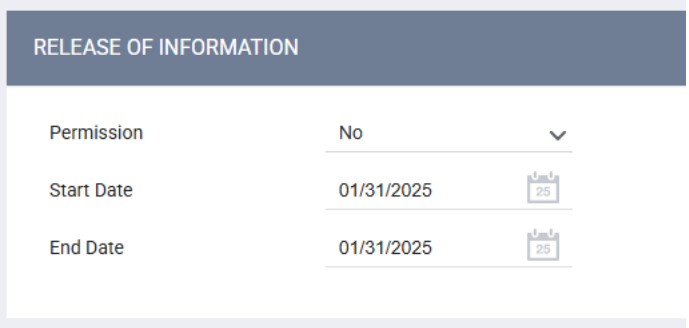
For most programs, clients must sign a ROI or provide verbal consent to access services. However, clients seeking emergency services from certain types of programs with no eligibility requirements may decline to sign a ROI and still access services. These cases are limited to low-barrier programs such as drop-in centers, one-night shelters, certain outreach or services-only programs. Even in these cases, services *must* be documented in ONE using the limited information the client is willing to share. If a client declines to sign a ROI in these circumstances, select these options on the ROI permissions screen:

Permission: No

Start Date: Defaults to today

End Date: Enter same date as start date (today)

This will allow you to then create a client record and enter any available information. In these cases, only the minimum information necessary to coordinate services is required.



To create a ONE record, you must enter at minimum a First and Last Name. Nicknames, code names, or fake names are acceptable, but it should be the client's choice and a name they will remember. Fill out the other required fields as follows to save the record:

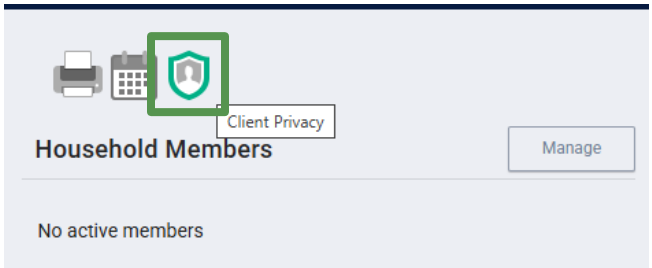
Last 4 of SSN: XXXX

Quality of SSN, Quality of Name, Quality of DOB, and Race and Ethnicity: Client prefers not to answer.

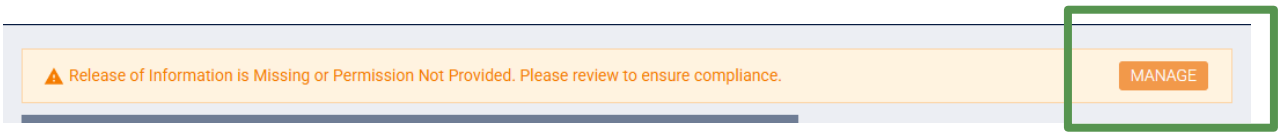
All other fields are optional.

In an existing client record

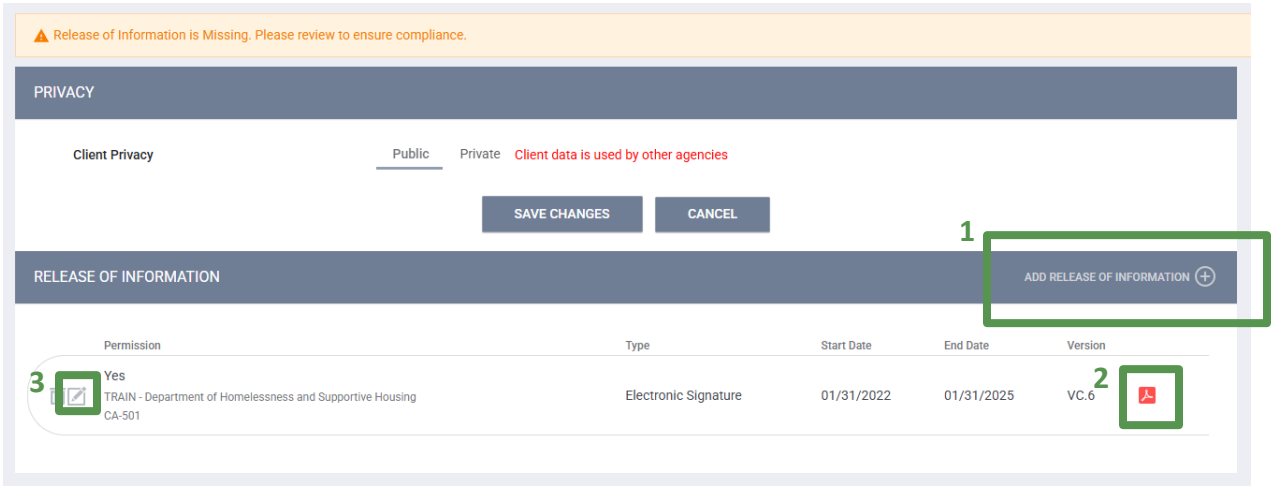
To update a missing or expired Release of Information in an existing record, access the Privacy page by clicking on the Privacy shield:



… or the "Manage" button in the yellow banner on the client record:



This will take you to the Privacy page, where you can add a new ROI by clicking the "Add Release of Information (+)" button (1):



You can also view any existing ROIs in a client's record in the "Release of Information" section. To view a client's ROI, click the PDF icon (2) to open the document.

To edit an existing ROI, click the pencil icon (3) to the left of the record. Note: if an ROI is expiring, please add a new Release of Information record. Do not extend an existing ROI. If necessary, you might need to amend the end date of an existing ROI to add the new Release. Only one ROI may be active at any time.