HMIS ROI Categories

When entering a Release of Information (ROI) into HMIS, there are currently three types available to choose from: Electronic Signature, Attached PDF, and Household. The first two ROI types are for adult clients. The third option, Household, is only to be used for minor children, as they cannot legally sign documents until they turn 18.

The image below shows the box that comes up when you click the (+) to add a new ROI.

PERMISSION: This option is defaulted to Yes.

START/END DATES: For Electronic Signature and Attached PDF ROIs, the start date should <u>always match the date that the client signed the document</u>. The end date for the ROI will automatically default to 7 years after the start date. Please see the section on Household ROIs for more information about the start and end dates for minors.

DOCUMENTATION: This is where you will choose between the three types of ROI categories.
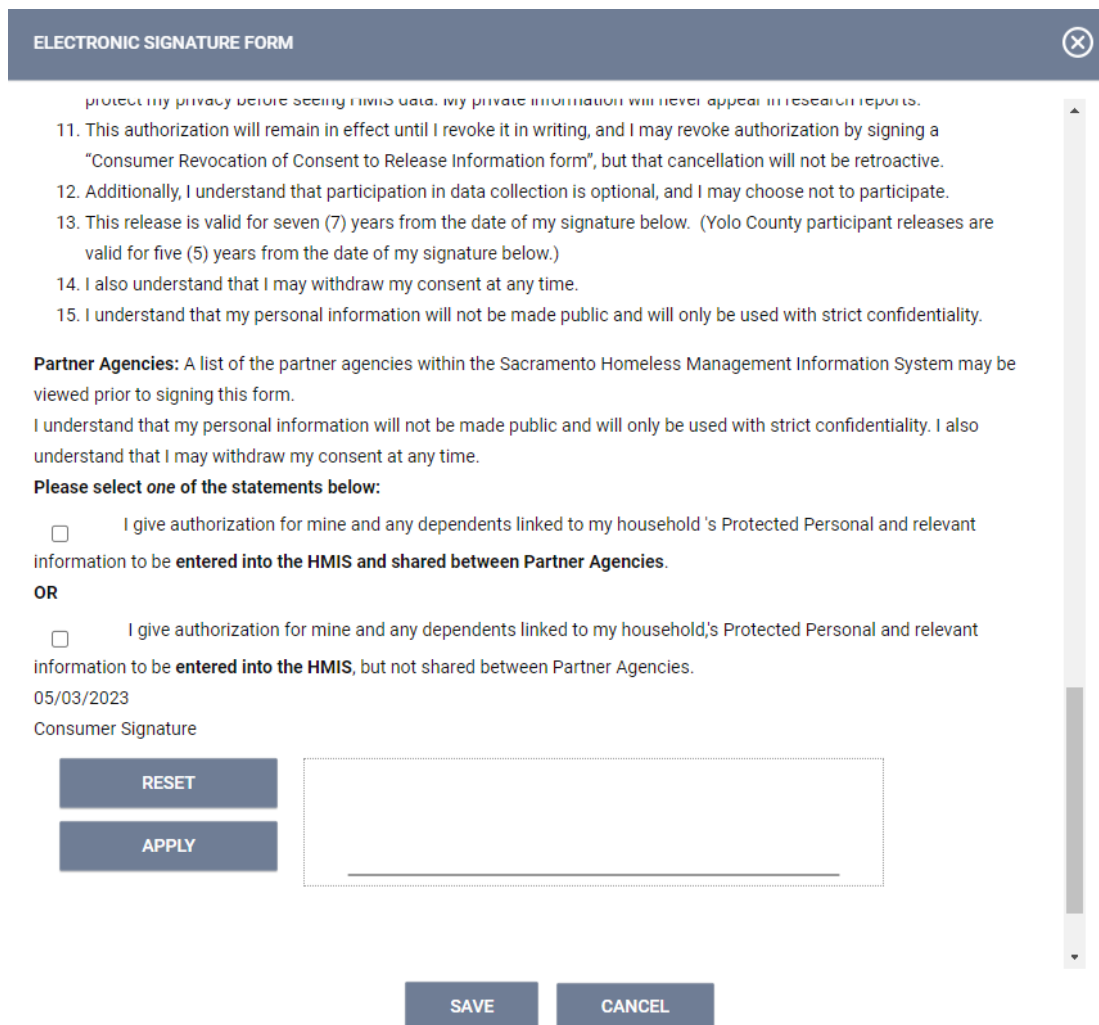
Electronic Signature ROIs

The first option is Electronic Signature. This option provides an electronic copy of the ROI on the page, which you can see in the image below. The client can sign this electronic version on a tablet or smart phone. By clicking the E-Signature Document box, the text below will appear in a separate window. The client needs to choose if they want to share or not share their information between agencies. When they have signed in the box, click "Apply" and then save your work.

NOTE: All ROIs in the system should start on the date that they are signed.

ELECTRONIC SIGNATURE FORM ⊗

protect my privacy before seeing HMIS data. My private information will never appear in research reports.

11. This authorization will remain in effect until I revoke it in writing, and I may revoke authorization by signing a "Consumer Revocation of Consent to Release Information form", but that cancellation will not be retroactive.

12. Additionally, I understand that participation in data collection is optional, and I may choose not to participate.

13. This release is valid for seven (7) years from the date of my signature below. (Yolo County participant releases are valid for five (5) years from the date of my signature below.)

14. I also understand that I may withdraw my consent at any time.

15. I understand that my personal information will not be made public and will only be used with strict confidentiality.

Partner Agencies: A list of the partner agencies within the Sacramento Homeless Management Information System may be viewed prior to signing this form.

I understand that my personal information will not be made public and will only be used with strict confidentiality. I also understand that I may withdraw my consent at any time.

Please select *one* **of the statements below:**

☐ I give authorization for mine and any dependents linked to my household 's Protected Personal and relevant information to be **entered into the HMIS and shared between Partner Agencies**.

OR

☐ I give authorization for mine and any dependents linked to my household,'s Protected Personal and relevant information to be **entered into the HMIS**, but not shared between Partner Agencies.

05/03/2023
Consumer Signature

| RESET |
| APPLY |

SAVE   **CANCEL**

Attached PDF ROIs

The second option is Attached PDF. This option provides the user an opportunity to upload the scan of a physically signed paper document. Our Sacramento CoC and Yolo CoC have slightly different ROI documents. You can find the most recent version of these documents on our website in our Document Library.   When you choose this option, the system provides you with a button to select the file you want to upload. Once uploaded, check the dates to make sure they are correct and then save changes to finish.

A few reminders about Attached PDF ROIs
- The ROI documents must be filled out completely.
- The signatures and dates must be signed by hand (wet signatures)
- The signatures and dates should be as legible as possible.
- Only the Sacramento and Yolo CoC HMIS ROIs can be uploaded in this section. Do not upload any other ROIs to this area. If your organization uses other ROIs, please add those to the client's File section.

NOTE: All ROIs in the system should start on the date that they are signed.

Household ROIs

The third option is Household ROI. This category is <u>only to be used for minors</u>, aka clients who are under 18 years of age and cannot legally sign contracts. This option is used in conjunction with a parent or guardian's Electronic Signature or Attached PDF ROI. After choosing this option, the next step is to set the start and end dates.

RELEASE OF INFORMATION

Permission	Yes
Start Date	05/03/2023
End Date	05/03/2030
Documentation	Household

SAVE CHANGES   **CANCEL**

Rules for Using the Household ROI Category:

- The parent or guardian's ROI must be added to the system first.
- As a default rule, the minor's Household ROI start and end dates should match the parent or guardian's ROI start and end dates. The only two exceptions to this rule are if…
    - … the minor is added to the household after the parent or guardian's ROI start date.
    - …the minor turns 18 before the parent or guardian's ROI end date.

NOTE: Please do not use this category for adult clients.

Adding a Household ROI for any client 18 or older will automatically create a data error in the system. This data error, including the user who added this ROI, will be sent to your agency to be promptly corrected.

HMIS Job Aid

Household ROIs for minors 11 and older

As explained above, the Household ROI category is specifically for clients who cannot sign their own legal document because they are minors (under the age of 18). When entering a new ROI, the start date defaults to the current day and the end date is seven years later. Because of this, any clients who will turn 18 within seven years from the ROI start date will need to have the ROI end date adjusted.

Once a client has their 18th birthday, they are legally able to sign a contract; users working with those clients must obtain a signed ROI for that client to add to HMIS. Their household ROI should end **the day before their 18th birthday.** To calculate the end date for a minor who will turn 18 before the parent's ROI has ended, simply add 18 to their year of birth and set the date for a day before their birthday.

Example: Jane and her family are entered into HMIS. Her children are 7, 11, and 17 years old.

Client	DOB	ROI Type	Start Date	End Date
Jane the Mom	08/17/1987	Attached PDF	03/27/2023	03/27/2030
7-year-old daughter	07/02/2016	Household	03/27/2023	03/27/2030
11-year-old son	05/13/2012	Household	03/27/2023	03/27/2030
17-year-old son	**01/03/2006**	Household	03/27/2023	**01/02/2024**

Birthday Math

Birth Year
        + 18
End ROI Year

2012	2006
+18	+18
2030	2024

Jane's 7-year-old daughter's Household ROI has start and end date that match her mother's ROI. As both of her sons may turn 18 before her ROI end date, we must calculate the date of their 18th birthdays.

Jane's 11-year-old son was born on 5/13/2012, so he turns 18 on 5/13/2030. Since the mother's ROI ends before he turns 18, his ROI end date matches his mother's.

HMIS Job Aid

Jane's 17-year-old son will turn 18 the following year, so we know his ROI end date will need to be adjusted. He was born on 1/3/2006, so he becomes a legal adult on 1/3/2024. Since the mother's ROI ends <u>after he turns 18</u>, his ROI end date is set to the day before his 18th birthday: 1/2/2024.

Adding New Children to a Household

And time a new household member is added to HMIS, they need an ROI on file. If a client has a baby or gains custody of another child, we will need to add the child to HMIS and to Jane's household. In this case, the minor's ROI start date must be adjusted to reflect the child's date of birth or official date they are added to the client's household in the case of a custody change. The child's ROI end date should match the parent or guardian's ROI end date, provided the child will not turn 18 before that date.

Example: Jane has a baby girl who needs to be added to HMIS. We add a Household ROI for the baby. However, as the baby wasn't born yet, she cannot use the mother's ROI start date. Instead, we will use the baby's birthdate as her ROI start date and match her ROI end date to her mother's ROI. As you can see below, the baby has been added to our previous list of ROIs.

Client	DOB	ROI Type	Start Date	End Date
Jane the Mom	08/17/1987	Attached PDF	03/27/2023	03/27/2023
Newborn daughter	**04/02/2023**	**Household**	**04/02/2023**	03/27/2023
7-year-old daughter	07/02/2016	Household	03/27/2023	03/27/2030
11-year-old son	05/13/2012	Household	03/27/2023	03/27/2030
17-year-old son	01/03/2006	Household	03/27/2023	01/02/2024

If you have any questions about this process, please feel free to email us or visit us during open office hours so we can help you directly. To find our open office hour times and links, please visit our website for the most updated information.