

Transacting ROIs for Coordinated Access

IMPORTANT: We have recently made changes to ROI policies.

Read on for more information.

- Consent to share data for Coordinated Access is now collected with a *verbal* consent form.
- Written release forms for Coordinated Access are no longer required.
- Assessors should use the *Coordinated Access Verbal Release Form* to document participant consent or non-consent to share data.

Download *Coordinated Access Verbal Release Form* [here](#).

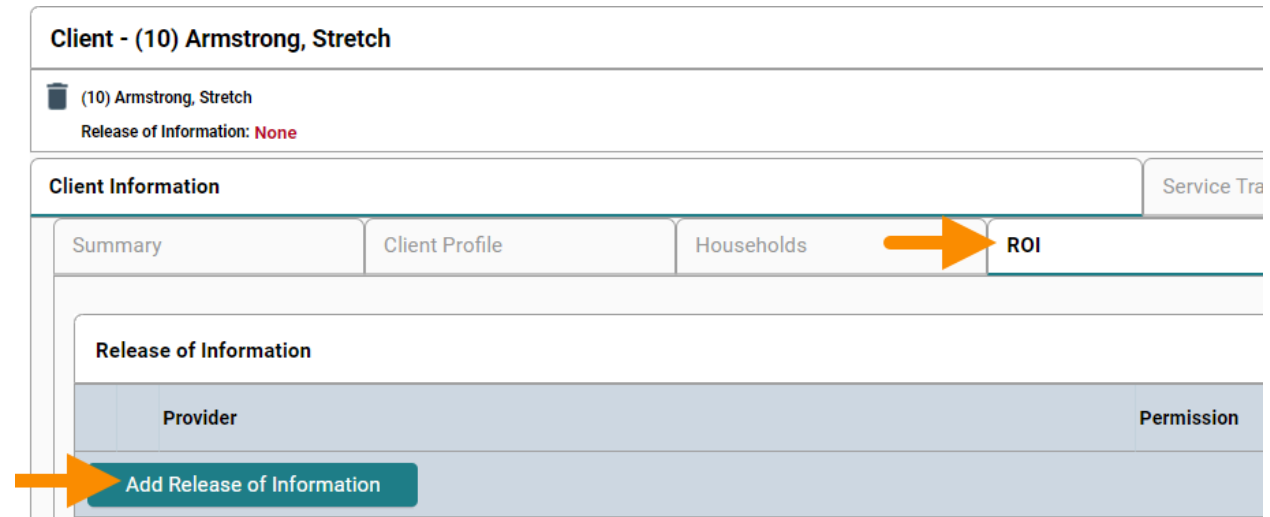
- You can also download this document and the CA Verbal Release Form [here](#) on our HMIS Links for Providers page. Look for the *Coordinated Access Verbal Release Form* in the section called “Data Sharing Release of Information (ROI) Materials”.
- The remainder of this document instructs you how to enter ROIs in HMIS.
- **Please note that Coordinated Access ROIs now last for 7 years.**

Overview

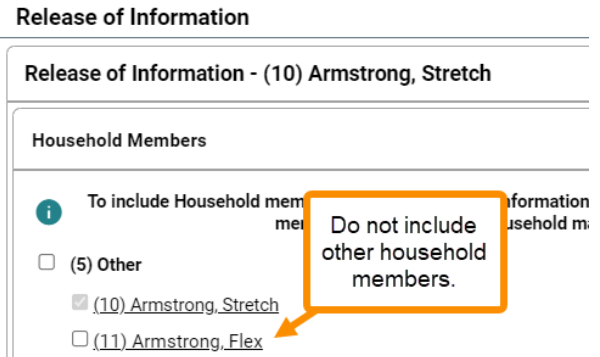
- Using information collected in the Verbal Release Form, *transact two ROIs*:
 - One for your parent/login provider (the default option) and
 - One for the provider called Multnomah Services and Screening Tool (MSST)(9066)

Instructions

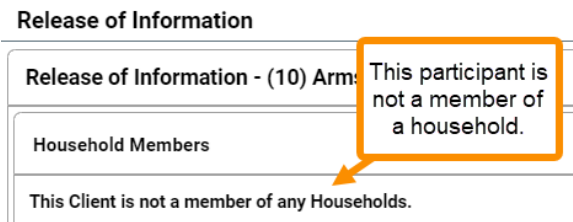
- In the participant’s record, click the “ROI” tab.
- Then, click “Add Release of Information.”



- If the participant is a member of a household, only include the participant in the entry.
Do not include other household members.



- If the participant is not a member of any households, skip to the next step.



ROI Prompts

- Your login provider is automatically selected.

Release of Information Data

Provider *	<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="My Provider"/>	<input type="button" value="Clear"/>
Release Granted *	-Select- ▼			
Start Date *	10 / 18 / 2024			
End Date *	/ / <input type="button" value="Calendar"/> <input type="button" value="Refresh"/> <input type="button" value="Calendar"/>			
Documentation	-Select- ▼			
Witness	<input type="text"/>			

- Click “Search”, then find and select the provider called Multnomah Services and Screening Tool (MSST)(9066). Then, click Exit.

- There should now be *two* providers selected: your login provider and the MSST provider.

Provider *	<input checked="" type="checkbox"/> Your login provider here <input checked="" type="checkbox"/> Multnomah Services and Screening Tool (MSST) (9066)
Release Granted *	Yes ▼
Start Date *	10 / 18 / 2024
End Date *	10 / 18 / 2031 <input type="button" value="Calendar"/> <input type="button" value="Refresh"/> <input type="button" value="Calendar"/>
Documentation	Verbal Consent ▼
Witness	Your name

- Release Granted: Select Yes or No based on whether the participant agreed to share data or not.





- Start date: Select the *MSST project start date*.

To ensure accurate data sharing, the ROI start date *must* equal the MSST project start date *even if consent was collected on a different day*.

- End date: **7 years** after the start date.

- Documentation: Select “Verbal Consent”.
- Witness: Enter your name.
- Click Save Release of Information.

When successfully transacted, the ROIs should look like this:

Release of Information					
	Provider	ROI Start Date equal to MSST project start date	Start Date	ROI End Date 7 years from ROI Start Date.	End Date
	 Your login provider here				
	 Multnomah Services and Screening Tool (MSST)				

Notes

- The MSST provider will only become visible to you after you complete all required HMIS training for Coordinated Access.
- The *Coordinated Access Verbal Release Form* does not need to be uploaded to HMIS. However, the form should be retained in the participant’s file for 7 years.