



NCCEH

HMIS Verbal ROI How To's Guide

Signed Release of Information (ROI) consent forms are a best practice, especially for information entered into the Homeless Management Information System (HMIS). If an HMIS participating agency operates a call center or has to do a verbal consent for other reasons, please use the provided Remote Privacy Conversation and ROI script. Follow the additional information below to implement a Verbal ROI when needed.

How to find/send clients a copy of the ROI form?

Offer to read the ROI form to clients and also give them the HMIS@NCCEH Client Privacy website provided in the script for a copy of the actual form and more information on privacy practices. However, not all clients can easily access websites or listen and understand something read over the phone. Offer to physically mail, email, or text a link to the form on the website. Please ensure you follow through with this request. Easily text from your email with: <https://rebrand.ly/sendtext>.

How long does a verbal ROI last?

Like paper copies, the Verbal ROI last for one year. All clients need an annual privacy conversation where you will renew the ROI. The HMIS@NCCEH Policies and Procedures require that agencies will have the client sign the paper ROI form at the next in-person meeting.

What happens after verbal ROI?

If the client consents to the verbal ROI, please complete the written parts of the paper ROI with their and household members' information. Write "verbal ROI" in the signature portion. The staff person having the privacy conversation with the client should initial and date the ROI. Ensure that you check the appropriate boxes for agreement to the sharing sections (they do have the option to say 'yes' or 'no' to each section as they would with the paper form). Keep a copy of this form as you would the normal ROI form. Funders may have additional guidance/requirements so please make sure you follow those as well.

If a client does not consent to one or more sections, contact the NCCEH Data Center (hmis@ncceh.org) with their client ID and wishes.

How do I record the verbal ROI in HMIS?

Follow your normal process for adding the electronic ROI (eROI) in HMIS. Under "Documentation" select "Verbal Consent." In the "Witness" section, indicate the staff member who initialed the ROI. The ROI end date should be set to three months out but can be adjusted if needed.