

How to:



Electronic Signatures for Release of Information

Santa Clara County CoC agencies can sign ROI's 2 ways: Paper or approved 3rd party signature apps (ex. Docusign) forms uploaded as a PDF or using Clarity's Electronic Signature function



1 Review existing ROI

(✓) Is there a valid ROI? Has the ROI expired?

2 Adding an Electronic Signature ROI

(✓) For expired ROIs or new clients, add a release of information

Click "Add Release of Information +" and select the permission, start and end date agreed upon with the client, and select Documentation type.

Choose Electronic Signature to E-sign the ROI.

3 Sign the new ROI

(✓) Review the language in the ROI

The language in the electronic form is identical to the language in the paper form. The major difference is that the initial fields in the paper form have been replaced by check boxes in the electronic form.

(✓) Client Signature

Scroll to the bottom of the form after client has read all components. Client must sign the form using a finger, track pad, e-pen, or mouse. Click "Apply" and then click "Save".

ELECTRONIC SIGNATURE FORM

- Auditors or funders who have legal rights to monitor or review the work of one or more Partner Agencies, including the U.S. Department of Housing and Urban Development, may view my PPI in the ordinary course of their work.
- Bitfocus serves as the System Administrator for SCC HMIS and software vendor of Clarity. To the extent that authorized agents and representatives of Bitfocus perform work on SCC HMIS, they may view my information in the ordinary course of their work.
- Partner Agencies and their authorized agents and representatives who use SCC HMIS to research and write reports have signed agreements to maintain the security and confidentiality of client information.
- I understand that medical, HIV/AIDS, mental health, and drug and alcohol records are protected under various federal and state regulations, including California Welfare and Institutions Code Section 5328, Confidentiality of Medical Information Act, California Civil Code Section 56.10 (CMIA), the Health Insurance Portability and Accountability Act, 45 C.F.R., parts 160 and 164 ("HIPAA"), and the Federal Regulations Governing Confidentiality of Drug Abuse Patient Records, 42 C.F.R., Part 2, and cannot be disclosed without my written consent unless otherwise permitted by law.

I Bugs Bunny expressly authorize my information disclosed pursuant to this Consent to be further disclosed by the recipients listed above for the purposes of assessing my needs for housing, counseling, food, utility assistance, or other services as part of the work of the CoC and HMIS.

RESET

APPLY

SAVE CANCEL

4 Save client's new ROI

RELEASE OF INFORMATION

Permission Yes

Start Date 02/28/2022

End Date 02/28/2025

Documentation Electronic Signature

e-Sign document - Completed

SAVE CHANGES CANCEL

Remember...

Do not add information to HMIS until ROI is valid

No client information may be added or updated in HMIS until a client signs a valid ROI and it is uploaded to the system.

Client must sign ROI and identify expiration date

You may read the ROI language to your client but staff should not sign the ROI for the client. Signature does not have to be legible but it must come from the client.

Check boxes and initials

When you review the ROI, please make sure to review the check boxes and/or initial locations.

Anonymous Clients

If a client refuses to sign an ROI, their client profile must be anonymous. Anonymity does not prevent a client from accessing the benefits of Coordinated Assessment.