



Adding Universal Release of Information (UROI)

Each client entered HMIS/CSIS must have an UROI on file to be able to share data cross the COC. By default, the system will ask you to add UROI upon creation of a client(s). However, there may be clients already in system whose UROIs have expired or never had this completed. Please follow the below instructions on adding a UROI.

The below instructions should be completed for all members of the household. For minor children, please be sure to check the **“a personal representative because the person is a minor, incapacitated, or deceased”** of the form when having the parent or guardian sign.

1. Login to Bit Focus.
2. Search for Client.

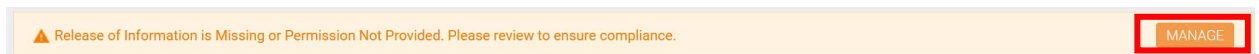
Use full name, partial name, date of birth or any combination. Recent searches will appear on right side of screen. If client is shown there you can select by clicking on their name.

If client is in system, they will appear below in the search box. If not, you will need to add client to the system

	Date of Birth	Age	Last Four SSN	Last Updated	ROI
Amy Barth	05/12/1968	53	2156	11/30/2021	Missing

3. To select client, hover your mouse over name and click on the box with the pencil to the left of the client's name.

The client demographic profile will appear. Review all information to ensure this correct. If client is missing a release of information, a warning will display across the top of the client's record. This will need to be completed before continuing.



4. To determine whether the client has an active UROI, select the privacy icon to the right of the client's profile.



- 5.
6. Select the manage button on the left of pop-up alert and add release of information



7. Permissions, Start and End date pre-populate. Select documentation type. If Electronic signature is selected, click on E-Sign Document to have client sign. If paper copy, select Attached PDF to upload. Click on **SAVE CHANGES** when complete.

Permission	Yes
Start Date	04/21/2022
End Date	04/21/2024
Documentation	Electronic Signature

E-SIGN DOCUMENT

SAVE CHANGES CANCEL