Cambridge HMIS
Review of Different ROI Scenarios

Scenario	What if?	Do this	Record status in Clarity
New, Opting In	My new client consents and signs form	Sign the form as well, enter ROI using the Yes answer choice. Save the record.	When you do this the record defaults to sharing across agencies. If someone from another agency searches for this client in our HMIS, they will find them in a search.
New, Opting Out	My client is new – they were not found in Clarity after a thorough search. This client does not consent to share, so they don't sign.	Select "No" on the privacy page and submit record. Then click on "Private" on that same page. Write "Refused" on form and print and sign your name. Upload to the Files section of Clarity for that client.	Since you marked the record as Private, Clarity will prevent anyone in other agencies from finding this record in a search. Only you and other End Users at your agency will be able to access it and work with it. The Release of Information banner on the profile page disappears because the record is private/locked.
New, Fleeing DV	My new client is *currently* fleeing a DV situation	Do not go through the consent process with your client. Use the following naming convention on the profile page: First name = Oooooo Last name = Xxxxxx DOB – 1/1/XXXX (1 year before or after their actual birth year) SSN = all zeros Choose "No" as the consent answer and submit. Now that you have a record with a unique ID, copy it and paste it into the Last Name field and save.	This is a deidentified record in Clarity. You and others at your agency should note the unique ID and name of client in a safe place in your office. This record is searchable and does not need to be locked because it does not have any identifiable information. The Release of Information banner will show on the profile page, and that's okay.

Scenario	What if?	Do this	Record status in Clarity
In system; opting out of new ROI	My client is already active in our HMIS/Clarity. I went through the new ROI with them and they do not want to share their data.	Look at the top of the Privacy Page for this client and see if the Privacy section shows “client data in use by other agencies” or any other message in red. If so, you cannot mark this record as Private. Select “No” on the privacy page and submit record. Write “refused” on form and print and sign your name. Upload to the Files section of Clarity for that client. Contact the HMIS Lead so they can determine the best way to de-identify the record and notify other agencies who may currently be working with the client.	This shared record cannot be made private so it will likely need to be de-identified. In advance of that, you and others at your agency should note the unique ID and name of the client in a safe and secure place in your office.
In system and identified, currently fleeing DV	My client discloses they are *currently* fleeing DV. We’ve had their new ROI on file with a Yes and they are currently identifiable in Clarity.	Look at the top of the Privacy Page for this client and see if the Privacy section shows “client data in use by other agencies” or any other message in red. If so, **please contact the HMIS Lead via a Clarity message and they can proceed to help you make the record de-identified ASAP**. If the record is NOT currently shared by others, you can overwrite the client’s information on the Profile page in accordance with the guidance given in the DV scenario above (see *New, Fleeing DV*).	This record is now de-identified. It does not need to be marked “Private” and you and others at your agency should note the unique ID and name of the client in a safe and secure place in your office.
Opted in with new 2020 ROI, now revoking	My client signed the new ROI with another agency and they recently informed me that they wish to revoke their consent to share.	Provide your client with the Revocation of Consent form and help them complete it if needed. Print and sign your name in the Agency Staff section and upload it to the Files Section of their Clarity Profile – choose the “revocation of consent form” file name from the dropdown. Email the HMIS Administrator with the client’s unique ID or send a Clarity message with their name to notify them of this request.	The record will be made de-identified in Clarity and other agencies serving this client will be notified. In a case where the client record was *not shared* with any other Partner Agency, the record should be locked/marked Private.

Scenario	What if?	Do this	Record status in Clarity
In system or not, Household with Children	My client is the Head of Household for a family with children under 18	You must use the paper form because the electronic version of the ROI in Clarity does not function for recording family members' consent on a single screen. Fill in the child/ren's full name and DOB on the last page of the paper form, after completing the previous page for the HoH. Scan both of these pages and upload to the ROI page for the client, selecting "Attached PDF" as the documentation type. Then proceed to each child's record and select "Household" as their documentation type.	Clarity will show all members of the Household as having a completed consent form.