

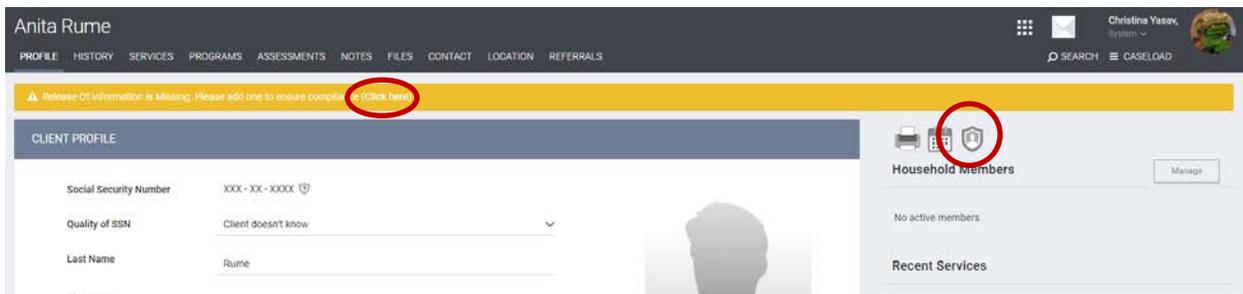


How to Change or Update the Release of Information:

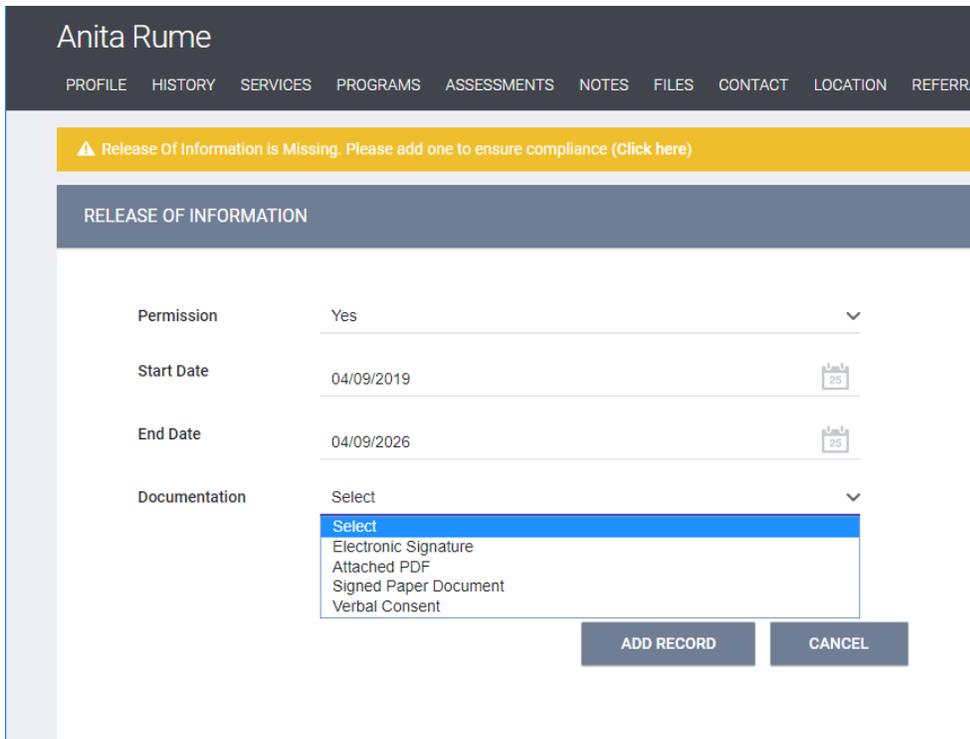
Please remember:

- ROIs are good for 7 years
- Clients can only have one ROI per agency on file at a time
- An ROI signed by a client for one agency covers data sharing for all agencies statewide

Click on the yellow banner on the top of the profile screen, or on the privacy shield in the right side panel.



Click on Documentation and choose the appropriate type.



For Electronic signature, you must scroll to the bottom of the pop up window and sign with the mouse, stylus, or touchscreen, depending on the type of device used. After each signature, click "Apply". When done, click "Save", then "Add Record"

The screenshot shows a web-based e-signature interface. At the top, there are two signature fields. The first is labeled "Signature of Client or Representative:" and the second is "Signature of Agency Witness:". Each field has a "RESET" button and an "APPLY" button to its left. To the right of each signature field is a date field containing "04/09/2019". Below these fields is a horizontal bar with "SAVE" and "CANCEL" buttons. Underneath is a date field with "04/09/2019" and a small "APPLY" button. Below that is a "Documentation" section with a dropdown menu currently set to "Electronic Signature". At the bottom, there is a notification banner that says "e-Sign document - Completed" with a close button (X). At the very bottom of the page are "ADD RECORD" and "CANCEL" buttons.

For Attached PDF, you must have scanned the paper form in and have it waiting in PDF form. (you will not be able to upload any other file type). Clicking "Select File" will open your computers' file explorer.

| | |
|---------------|--|
| Permission | Yes |
| Start Date | 04/09/2019 |
| End Date | 04/09/2026 |
| Documentation | Attached PDF |
| File | <input type="button" value="Select File"/> |

Select the file you want, then click “Open” on the bottom right of the pop-up window, then click “Add Record”

▼

Adobe Acrobat Document
▼

RELEASE OF INFORMATION

| | | |
|---------------|---|---|
| Permission | Yes | ▼ |
| Start Date | 04/09/2019 | |
| End Date | 04/09/2026 | |
| Documentation | Attached PDF | ▼ |
| File | <input type="button" value="Select File"/> | |
| | <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Client Release of Information - FINAL.pdf ✕ </div> <div style="font-size: 0.8em; margin-top: 2px;">(142.05KB) - Completed</div> <div style="border-bottom: 2px solid #007bff; width: 100%; margin-top: 2px;"></div> </div> | |

For Signed Paper document, simply type the location the physical document will be stored.

(Note: This method requires you to be able to furnish the document on request, as there is no digital record in Clarity)

 Release Of Information is Missing. Please add one to ensure compliance ([Click here](#))

RELEASE OF INFORMATION

| | | |
|---------------|--|---|
| Permission | Yes |  |
| Start Date | 04/09/2019 |  |
| End Date | 04/09/2026 |  |
| Documentation | Signed Paper Document |  |
| Location | <input type="text" value="Free text location here"/> | |

ADD RECORD

CANCEL