Guide To:
Running ROI Reports
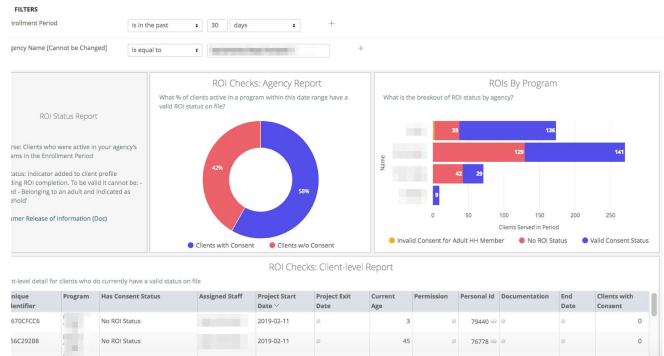. . . . .

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Objective:

Check in on how many of your **current clients** have a valid ROI status on file and monitor opportunities to verify permissions in HMIS. Any client you work with must have a valid ROI on file, regardless as to whether your agency created the profile or not.

Our annual self-audits will require that an agency will be required to upload either 25% of their agency clients who are missing the forms or 100 clients, whichever is less.

IMPORTANT NOTE: If you have access to multiple agencies in HMIS, this report will not currently work for you. Bitfocus is currently working on resolving this issue. You can request this to be emailed to you on the Reporting Request Form.

What this report is looking for:

A "valid" ROI is one that:

- Has a status indicated in the client's shield/Client Privacy section
- Is not expired
- Is not a "household" consent -- meant only for minors -- covering an adult (18+)

For a refresher on how to manage ROIs, please check out our training videos:
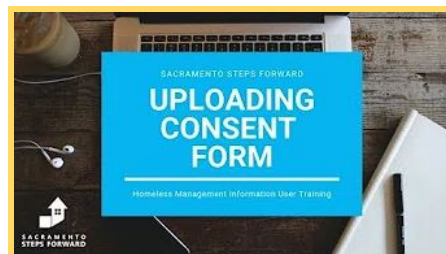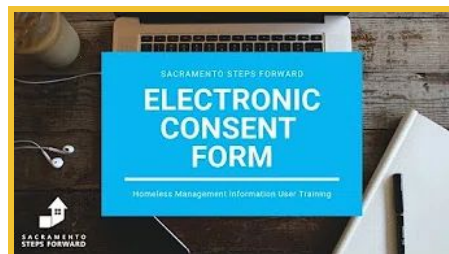
How to run the report:

↪ Location:

Reports > Data Analysis > Sacramento County HMIS Reports > Release of Information Status

↪ How to Read this Report

This is a dashboard containing three reports.

Filters:
- **Agency Name:** This is a dummy filter unless you belong to multiple HMIS agencies
- **Program Name:** Similarly, this is a dummy filter, unless you have access to multiple HMIS programs

Fields:

Aged Out of Household Consent: This client has an active ROI, but it's indicated as a 'household' ROI and the client is over 18 (this client need to sign their own ROI)
Valid Uploaded Consent: Client has a current, valid Electronic Signature / Uploaded PDF consent on file (as counted in audit)
Valid Consent (Any): Client has current, valid consent relative to age and date. These do not get counted among the 25% required on the audit.
No Consent on File: This client has no active consent on file and needs a status indicator.

⇥ Actions to Take

The goal is to have 100% valid ROI statuses on file and at least 25% Electronic attachments on file.

Resolve invalid cases by:
1. examining the cases in the "ROI Checks: Client-level Report"
2. updating the Client's ROI section of the profile.

The two simplest ways to explore your data are the following:

1. Open up Cases Directly from the Report

On the bottom-most report, you will be linked to a client profile if you click on the three horizontal

dots ••• next to 'Personal Id'. Just click on the ↗ icon:

2. Downloading the Data (best for redistribution**)**

You can download the results by hovering in the upper-right hand corner of the report to produce three vertical dots and select 'Download Data'