## ATTACHING A RELEASE OF INFORMATION (ROI)

As of the 2018 ROI Training (date TBD), projects are required to attach a signed Release of Information when creating a new, shared record. These instructions describe the process for doing so in ServicePoint.

- 1. Confirm you are in **EDA mode** to the correct provider, and in the Head of Household's record.
- 2. Use Current System Date.

3.

Back Date Mode		
🛕 The current System Date is set to:		
01/09/2018 10:32:47 AM		
If you would like to use a different date, please select one below:		
Back Date 01 / 09 / 2018 🛛 🖓 💙 🖓 12 🔻 : 00 🔻 : 00 🔻 AM 🔻		
Set New Back Date		
io to <b>Client Profile.</b>		

Client Information				
	Summary	Client Profile	Υ	

- 4. Scroll to the bottom of the page.
- 5. Click Add New File Attachment in File Attachments section.

Add New File Attachment

6. **Choose File** from your computer for the Release of Information, click on **Open**. Add "**ROI**" to Description and click Upload.

Upload Attachment		
Name *	Choose File No file chosen	
Description	1	11
	Upload	Cancel

The Release of Information is now attached to the client file.