Release of Information
Guidance

Steps in completing a Release of Information service:

- **Full name of person authorizing disclosure of Protected Health Information (PHI)** – Enter the full name of the individual or authorized representative who is allowing MRCSB permission to disclose Protected Health Information. At minimum, this should be first name, middle initial, last name and suffix, if any.
- **Individual's DOB**
- **Authorize Mount Rogers Community Services Board** – Choose appropriate option
  - **To disclose to** – means that MRCSB will be providing PHI to another person or entity.
  - **Exchange with** – means that MRCSB will be sharing PHI back and forth with another person or entity.
  - **Obtain from** – means that MRCSB will be the recipient of PHI from another person or entity.
- **Name of person or agency** – Enter the person or agency's name. This section includes only one (1) area for one (1) authorization. It is ONLY allowable for one person or one agency. For each person/agency, a separate release of information must be completed.
- **Information to be disclosed** – Check appropriate options
- **Disclosure may include** – Check appropriate options.
  - If you are disclosing any PHI which MRCSB obtained for the purposes of treating alcohol or substance abuse, making a diagnosis for that treatment or making a referral for that treatment, you must select the 'Alcohol and/or Drug Abuse information' box.
  - If you are disclosing any PHI which identifies the individual has having AIDS or HIV or other infectious diseases (such as TB, Hepatitis, etc.) select the appropriate box.
- **Purpose of disclosure** – Check appropriate options.
  - It is very important that this section be filled in and even more important to pay attention to this section before disclosing protected health information. This is the section where the individual tells us under what circumstances it is alright for us to disclose the information for which permission has been granted. If the Purpose section is not filled out, then the Authorization to Exchange/Release Information form is invalid and you cannot release/disclose information based on the authorization.
- **Authorization will expire in** – Choose appropriate option.
  - **90 days from date of my signature** – indicates that the release of information will expire 90 days from the date in which the individual signs the service

  - **365 days (one year) from date of my signature** – indicates that the release of information will expire 365 days from the date in which the individual signed the service
  - **Discharge date** – indicates the date in which the individual was **discharged from the agency**
- Basis of Representative's authority to sign Authorization on behalf of the individual (e.g. parent, guardian, etc.) – Enter the information.
  - Other examples include medical Power of Attorney, Executor of Estate for a deceased individual, guardian ad litem if the court order specifies the authority to access and disclose medical information. Obtain a copy of the basis of authority and file in the individual's record (exception: custodial parents of a minor).

Updating the original Release of Information service:

If the individual is discharged from the agency, all current release of information services will be updated to ROI Inactive.

- Once the individual has been unassigned from all teams/programs/employees, notify the appropriate administrative coordinator or QA staff of the individual that has been closed to the agency.
- If QA staff is completing the process, office staff will assign the appropriate QA staff to the individual.
- The administrative coordinator or QA staff will complete the process of updating the Release of Information services to ROI-Inactive.

If the individual and/or authorized representative requests that a release of information be revoked, the original release of information service will be updated to enter the revocation information and the service type will be updated to ROI Revoked.

- If the staff that originally completed the service is not the staff updating the service, the service will need to be relinked to the appropriate staff.
- Once the service is relinked (if needed)
- Open the service
- Click the Update button at the top of the service
- In the Program/Service Type drop down box, choose ROI Revoked
- Then click on the Update Service button at the bottom

****Please ensure that the Release of Information services are approved. Approval may be required once the services have been updated as well.****