Client Consent / Release of Information (ROI) Form Checklist

The Essentials

- ❑ Name of client
- ❑ Name of lead organization making the disclosure
- ❑ Recipient(s) of the information (be specific)
- ❑ Purpose of disclosure (be specific)
- ❑ Scope of information to be released (be specific)
- ❑ How to revoke consent
- ❑ Time period for which consent is in effect and expiration date of consent
- ❑ Signature of client or legal representative
- ❑ Date of signed consent

What We Strongly Encourage You to Include

- ❑ Context of the client release form (i.e. how client information is collected, stored, used, and shared)
- ❑ Explanation of privacy policies and regulations protecting the shared information
- ❑ Limitations of the client release form (i.e. small risk of security breach, potential for information to be redisclosed and no longer protected by federal privacy regulations)
- ❑ Explanation of the client's privacy rights (to refuse consent without losing eligibility for benefits, receive copy of release, and review privacy policies)
- ❑ Exceptions to sharing confidential information (e.g. information pertaining to domestic violence, dating violence, sexual assault, stalking, or HIV/AIDS)
- ❑ Point of contact for any questions the client may have

Disclaimer: *As client consent / release of information (ROI) forms vary based on local regulations and the type of services you provide, we can't give you a surefire checklist of everything you must include in your client release. But by comparing various client consent forms and guidelines found online, we've compiled these checklists that should cover just about everything. Also note that this checklist is for informational purposes only. It is neither legal advice nor a substitute for the advice of an attorney licensed in your state.*