PR4: Identify & Upload a Missing Consent Form to an Existing Client File

A HIFIS & By-Name List Consent form can be uploaded to an existing client file. This process may be necessary in the following situations:

- Your agency has designated one person to scan and upload consent forms to new client files, so your users do not attach the consent form when they add the client to HIFIS.
- You have re-collected consent from a client whose consent expired (i.e., one year has passed).

How to Identify Clients with Missing Consent Forms

To identify clients who are old enough to consent on their own behalf, and who have an existing HIFIS file but no attached consent form, run the **Consent Audit - No Client Consent Form** report. This report is available from the Custom tab on the HIFIS Report Manager.

NOTE: If you are a shelter and use ANON files to occupy beds for clients who decline to sign the consent form, note that the ANON files will display on this report but do not need an uploaded form.

How to Add a Consent Form to an Existing HIFIS Client File

1. Navigate to the Client's file (i.e., search for the Client in the Client Search box and click on their name in the results list).

2. Click Client Information > Consent.

3. Click the Edit button. If the Client has Coordinated Access + Explicit Consents, select the Edit button on the Explicit record.

4. Click on the File on Record edit button.

5. Click the Browse button. Select the signed consent form file and click Open.

6. Click Save to save the record with the uploaded consent form.