**COMPLETED BY:**

1. Staff member who identifies need to request or exchange information on behalf of the client.

**COMPLIANCE REQUIREMENTS:**

1. Required for all clients when an exchange of information with another party is warranted.
2. The following areas are required:
   1. Current date.
   2. Client information which includes: last name, first name, middle initial, address, city/state, zip code, telephone number, SSN (optional), DOB, and any AKA’s.
   3. Individual or organization authorized to make disclosure.
   4. Individual or organization to whom the information may be disclosed to and used by.
   5. Type of information to be disclosed.
   6. Start date and Expiration date
   7. Signature of client or legal representative/guardian with date.
3. County Providers shall use the approved County Form (23-07 HHSA). Contracted Providers may choose to use this form as well, but need to include their own logo and Program Information in the header. Contracted providers are to seek their own legal counsel regarding authorization and appropriate forms.

**DOCUMENTATION STANDARDS:**

1. Clients who are 18 years of age or older or emancipated may sign for their own authorization.
2. Additionally, under some circumstances a minor 12 years and older may sign for authorization (see Welfare and Institutions Code 14010 and Family Code 6924, 6929, 7050).
3. For Dependents of the Court, an ex-parte or court order may be utilized to authorize use or disclosure of protected health information.
   1. Authorization to Use or Disclose Protected Health Information – Parent (number 04-24A-P and dated 06/13) is generated by the Child Welfare Services worker for the parent / guardian to sign for the purpose of disclosing protected health information to the Child Welfare Services worker.
   2. Order for Release of Protected Health and Education Information (number 04-24A-C and dated 06/13) is generated by the Courts for the purpose of disclosing protected health information to the Child Welfare Services worker.
4. Completed forms are to be kept in the hybrid chart.

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