



Communication Release

07/14/2026

Secondary Provider Recreations of SAPC ROI Forms Review and Approval Process

Based on provider feedback, SAPC is implementing a review and approval process for Secondary Providers that wish to recreate the SAPC Release of Information (ROI) forms in their own Electronic Health Record (EHR) systems for the purpose of implementing a workflow that is integrated within their primary EHR system.

Secondary Providers must receive written approval from SAPC's Health Information Management (HIM) Section before using their recreated SAPC ROI forms and recreated SAPC Supplemental Authorized Individuals/Entities for ROI form. To submit recreated forms for review, Secondary Providers must complete and submit the [Secondary Provider Recreation of SAPC ROI Forms Submission Questionnaire](#), with the recreated SAPC ROI forms attached, to SAPC-HIM@ph.lacounty.gov. The questionnaire will also be available on the SAPC website under the Clinical tab on the [Manuals, Bulletins, and Forms](#) page.

Recreated SAPC ROI forms must be functionally, visually and, textually identical to the current SAPC-approved PDF forms. This includes, but is not limited to:

- Instruction pages and "How to Fill Out" pages
- All form language, notices, statements, section titles, field names, and checkbox wording
- Logo, header, footer, margins, page numbers, and overall formatting
- Field placement, signature fields, date fields, and required fields
- Form functionality, including selection requirements and dependencies between fields or sections
- Once a recreated ROI form is completed, electronically signed, and finalized in the provider's EHR system, the completed form content and electronic signature(s) cannot be altered, replaced, deleted, or otherwise modified.

If signature(s) are captured on a separate signature page, the separate signature page must be included with the recreated ROI form and must clearly identify to which signature field each signature corresponds, such as client/legal representative authorization signature, witness signature, or revocation signature, as applicable. For detailed requirements, please see the [Secondary Provider Recreated SAPC ROI Form Review Checklist](#). The checklist will also be available on the SAPC website under the Clinical tab on the [Manuals, Bulletins, and Forms](#) page and will be used by SAPC to evaluate provider's recreation of SAPC's ROI forms for acceptability.

Secondary Providers must submit three completed samples for each recreated SAPC ROI form submitted for review:

- Authorization Sample: A completed sample of the recreated SAPC ROI form demonstrating the standard authorization or consent workflow. The Revocation of Consent section must remain blank.
- Revocation Sample: A completed sample of the recreated SAPC ROI form demonstrating the revocation workflow. The sample must demonstrate that the complete Revocation of Consent section is added to the finalized consent without altering, replacing, deleting, or otherwise modifying any information, selections, dates, or signatures contained in the original consent portion.
- Signature by Mark Sample: A completed sample of the recreated SAPC ROI form demonstrating the signature-by-mark workflow. The sample must demonstrate that the client's mark and both required witness signatures are clearly displayed and associated with the appropriate signature fields.

All completed samples must use dummy/test client information only. Please do not include real client Protected Health Information (PHI) in the submission.

SAPC-HIM will review completed submissions to determine whether the recreated SAPC ROI forms are functionally, visually, and textually identical to the current SAPC-approved forms. Incomplete submissions will not proceed to full review until all required information and documents are received. SAPC-HIM will make reasonable efforts to complete the review and issue a written decision within ten business days from the date a complete submission is received. If additional time is needed due to submission volume, complexity, reviewer availability, or other operational needs, SAPC-HIM will notify the provider.

If the recreated form is denied, SAPC-HIM will provide the identified deficiencies and instructions for correction and resubmission. Resubmissions will be treated as a new review cycle.

Until SAPC-HIM issues written approval, Secondary Providers must use the current SAPC-approved ROI PDF forms and obtain client signatures.

- In support of providers meeting the ROI compliance, SAPC has extended the ROI compliance date from Wednesday, July 1st, 2026, to
- Primary Providers: August 1st, 2026
 - Secondary Providers: September 1st, 2026

For questions related to implementation of the ROIs or the recreated ROI form review process, please contact SAPC-HIM@ph.lacounty.gov.

Electronic Release of Information (ROI) Forms in Sage-PCNX LIVE

The electronic versions of SAPC’s updated Release of Information (ROI) forms are now available in Sage-PCNX LIVE.

	ROI for Payment and Operations	/ Avatar PM / Client Management / Disclosure Man...
	ROI for Treatment and Care Coordination	/ Avatar PM / Client Management / Disclosure Man...
	ROI for Legal Proceedings	/ Avatar PM / Client Management / Disclosure Man...

Primary and Secondary Providers are encouraged to complete the ROI forms in Sage-PCNX as it will allow Sage users easier visibility on which ROI forms have been completed. The electronic ROI for Payment and Operations is a non-Episodic form, meaning if any treatment provider completes it in Sage, it will apply to all agencies within the network.

Providers may continue to use the paper ROIs. Secondary providers may also follow the process above to have their recreated SAPC-ROI forms in their EHR systems approved for use. If paper ROIs are used, they are required to be uploaded to Sage for both Primary and Secondary Providers. Either paper or electronic Sage ROIs may be used to meet ROI requirements for disclosure.
