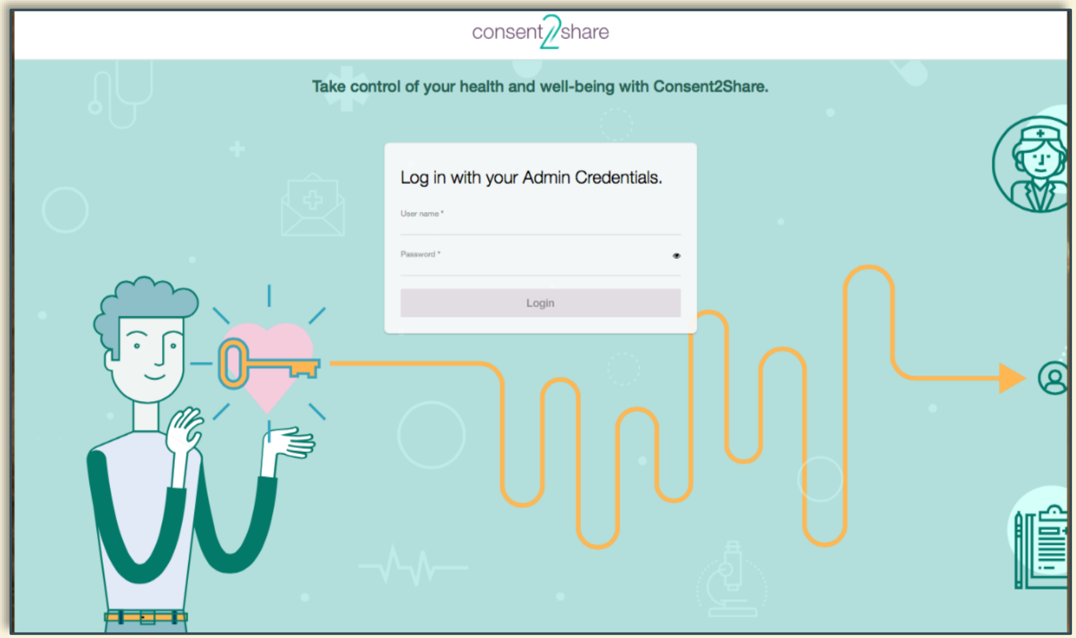
SAMHSA HealthIT HEALTH INFORMATION TECHNOLOGY

Consent2Share V3.3.0 Provider User Guide



Substance Abuse and Mental Health Services Administration
SAMHSA

About Consent2Share

- A secure website that provides patients with 24-hour access to their personal health record
- Accessible anywhere using an internet connection
- Puts patients in charge of their own health information
- Allows patients to share your health records with providers
- Allows patients to choose what they wish to share
- Allows patients to provide electronic consent for their choices
- Allows patients to choose between English and Spanish translations

Provider Roles

- Consent2Share allows patients to register and create their own patient user accounts
- In addition, Consent2Share allows providers to help patients create their patient user accounts
- Providers can complete nearly the entire workflow required to create a patient user account
- However, patients must still complete registration steps and only patients can sign online consent
- This guide walks providers through patient account creation and several additional processes shown on the next slide

About This Provider User Guide

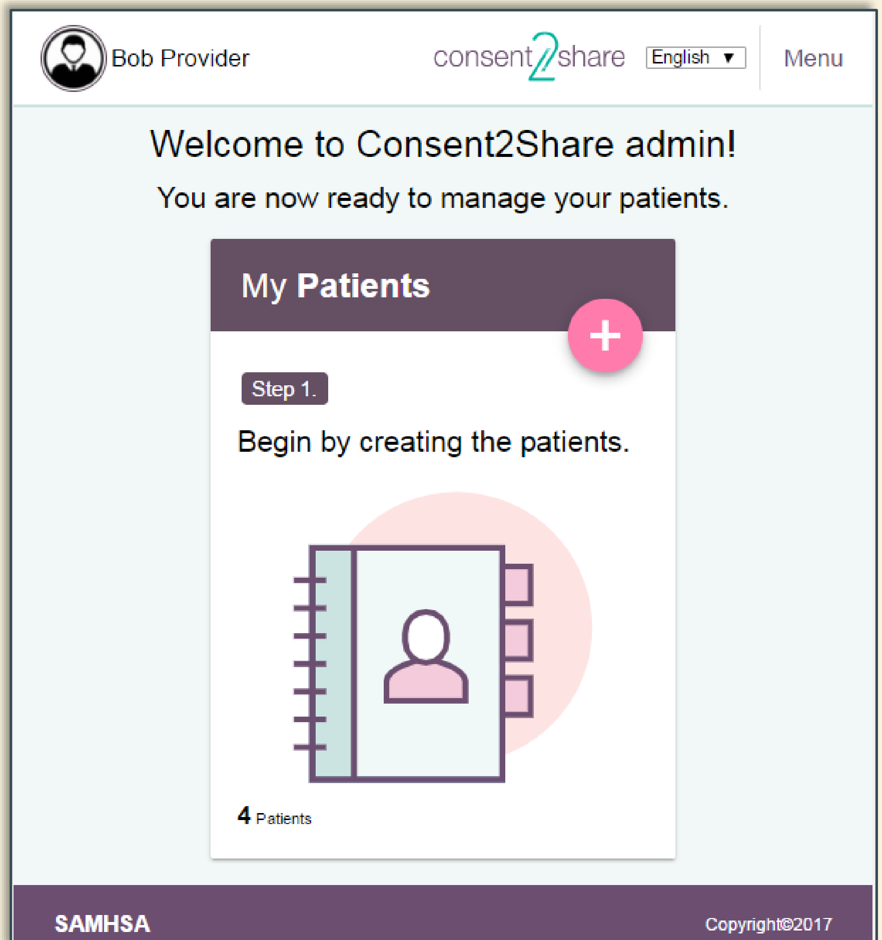
This Provider User Guide will show you how to:

1. Create a Patient Account
2. Enter Patient Demographics
3. Activate a Patient Account
4. Add Providers
5. Create a Consent
6. Segment Patient Data
7. Search for Patients
8. Update Patient Information

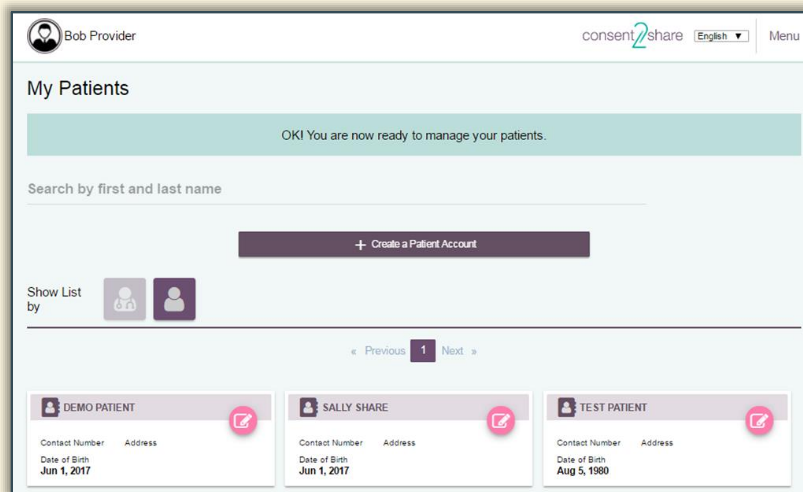
Section 1: Create a Patient Account

- First, go to the Consent2Share Provider Portal
- Next, enter your provider credentials

Click the My Patients Card

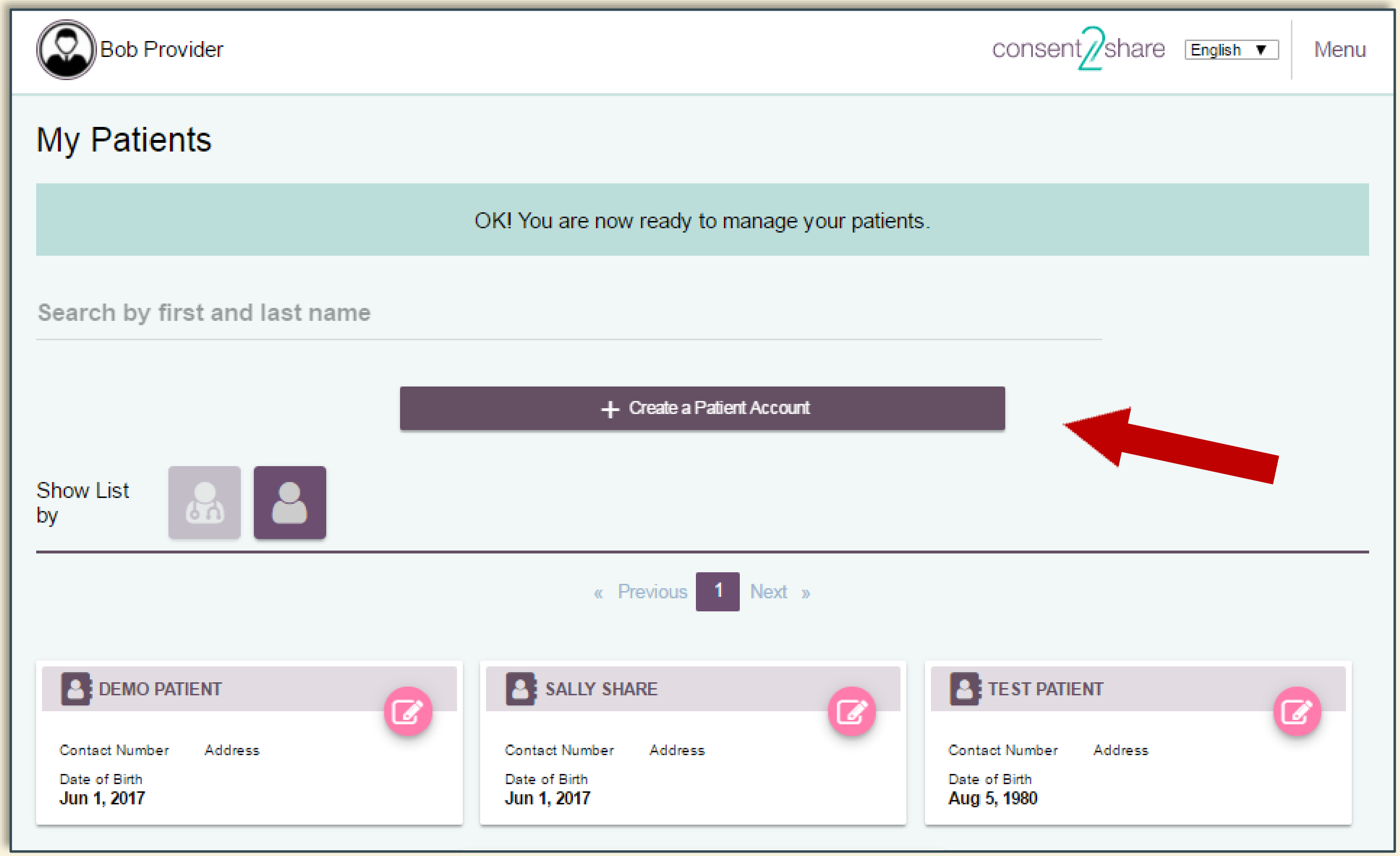


- After login, the Provider Welcome Page opens
- Click the My Patients Card
- This opens the My Patients Page



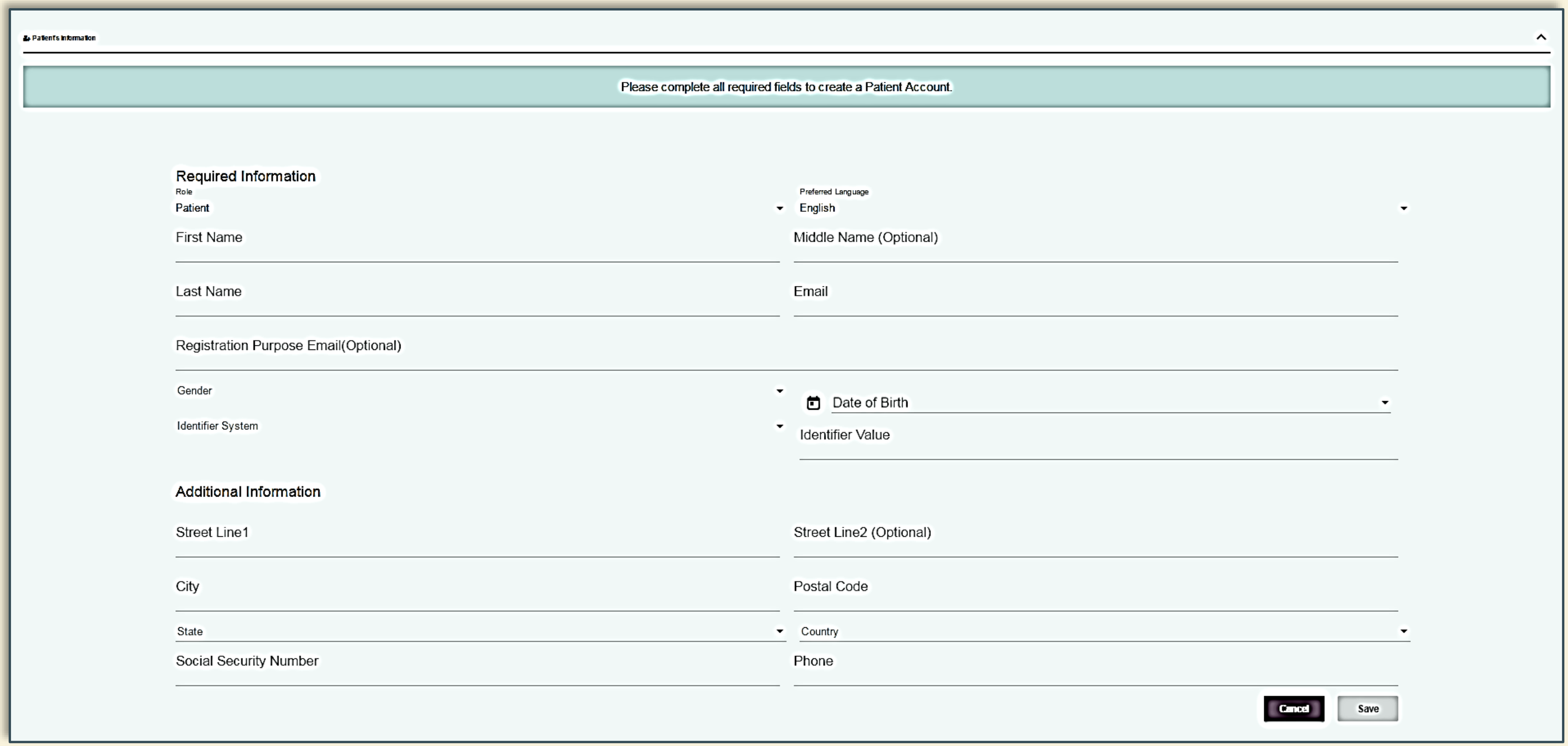
Click the Create a Patient Button

At the My Patients Page, click the Create a Patient Account button



Patient Demographics Page

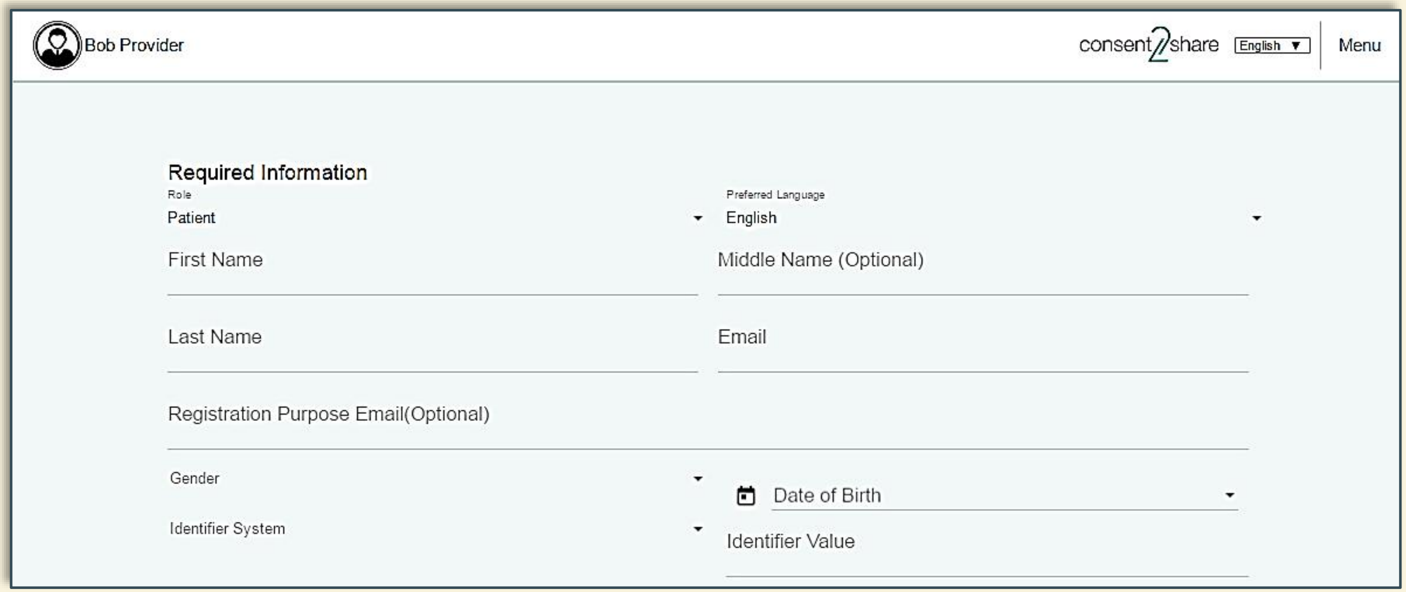
The Patients Demographics Page will open



Section 2: Enter Patient Demographics

On the Patient Demographics Page, enter the *Required Information*

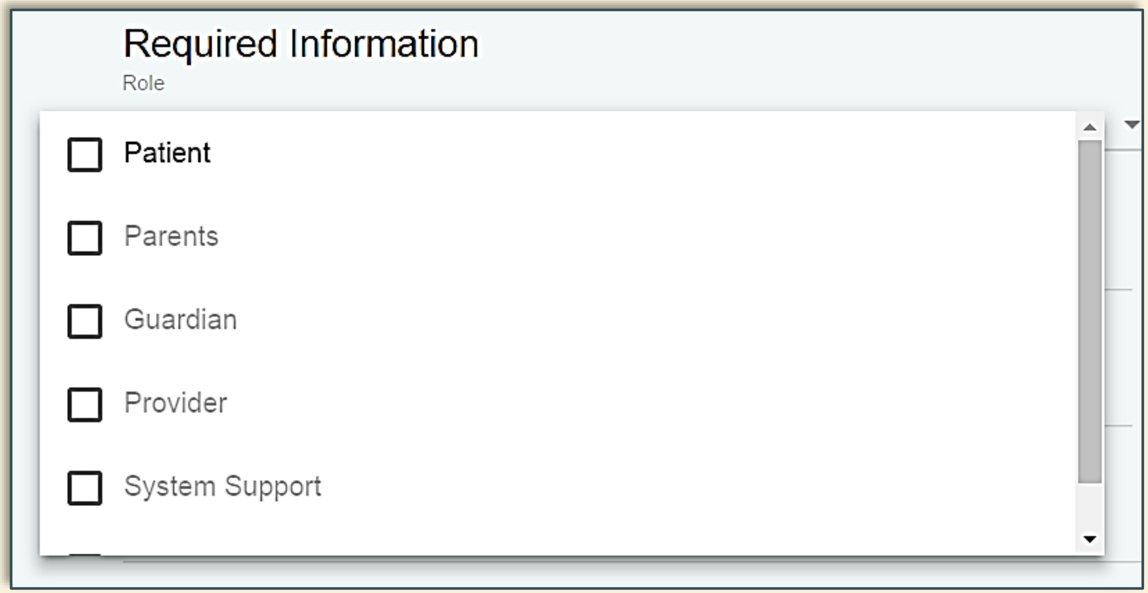
- ✓ Note that you can choose English or Spanish
- ✓ Enter patients’ first name, last name, and optional middle name
- ✓ Enter patients’ email, gender, and date of birth
- ✓ Enter the Identifier System and Identifier Value



Use Drop-down Menus

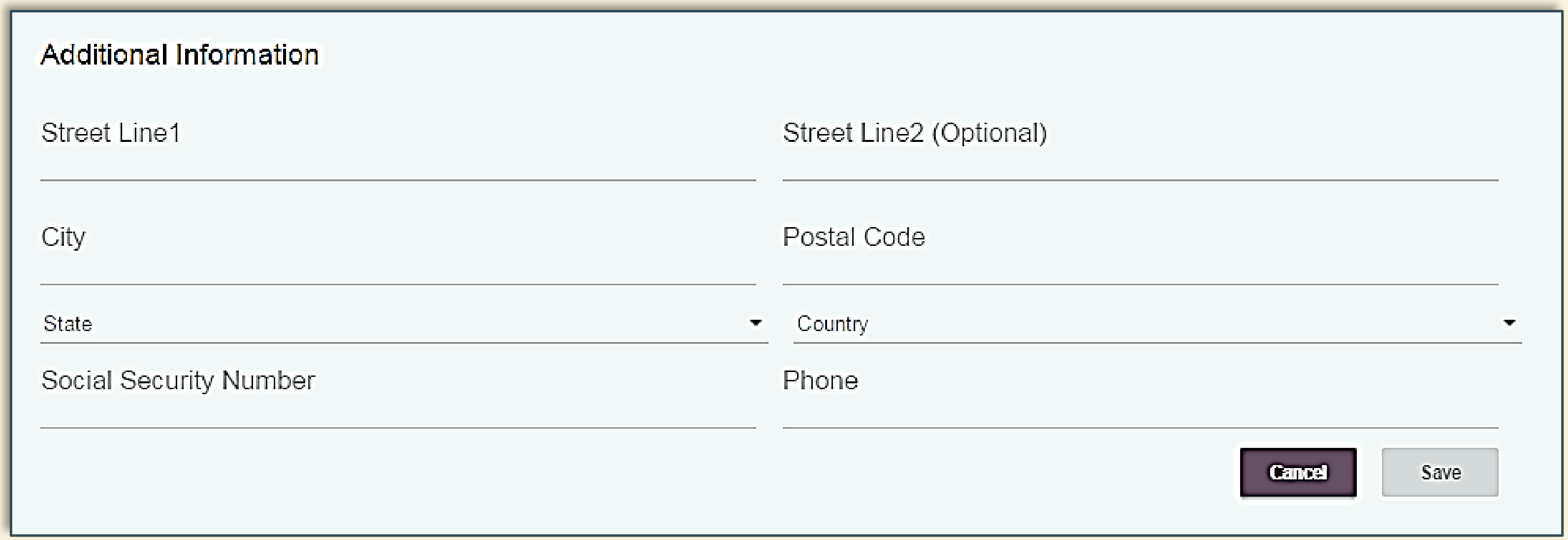
Note the drop-down menus for

- ✓ Role and Language
- ✓ Gender and Date of Birth
- ✓ Identifier System and Identifier Value
- ✓ State and Country



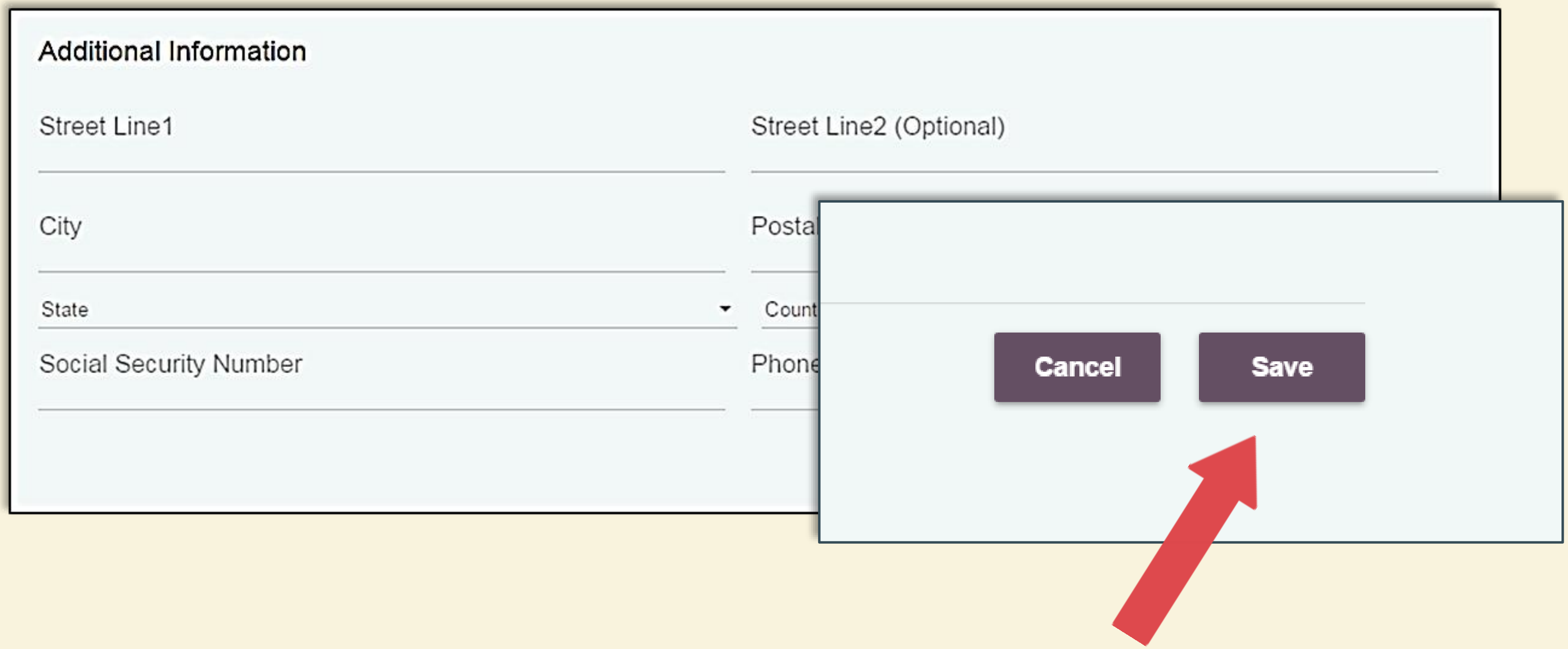
Enter Optional Patient Information

- You can also enter optional *Additional Information*
  - ✓ Address, Social Security number, and phone number
- You can enter the information now
- Or, you can update patient information later



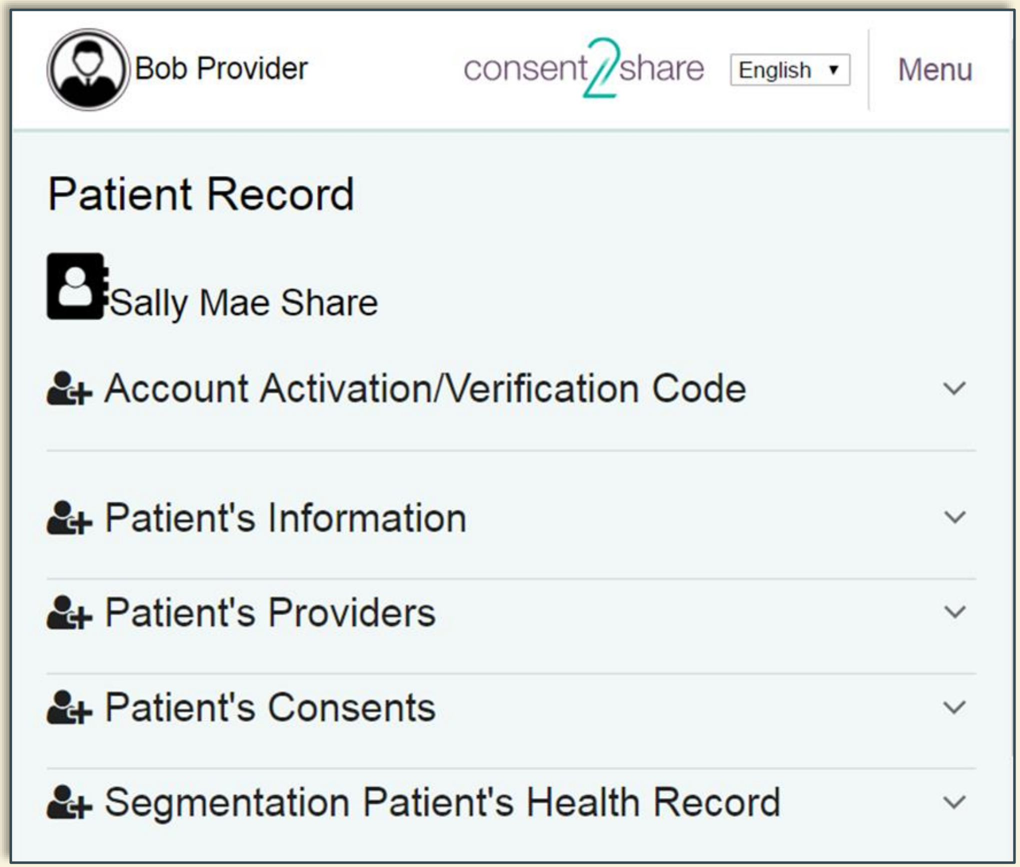
Click Save When Finished

When finished entering patient information, click the Save button



Section 3: Activate a Patient Account

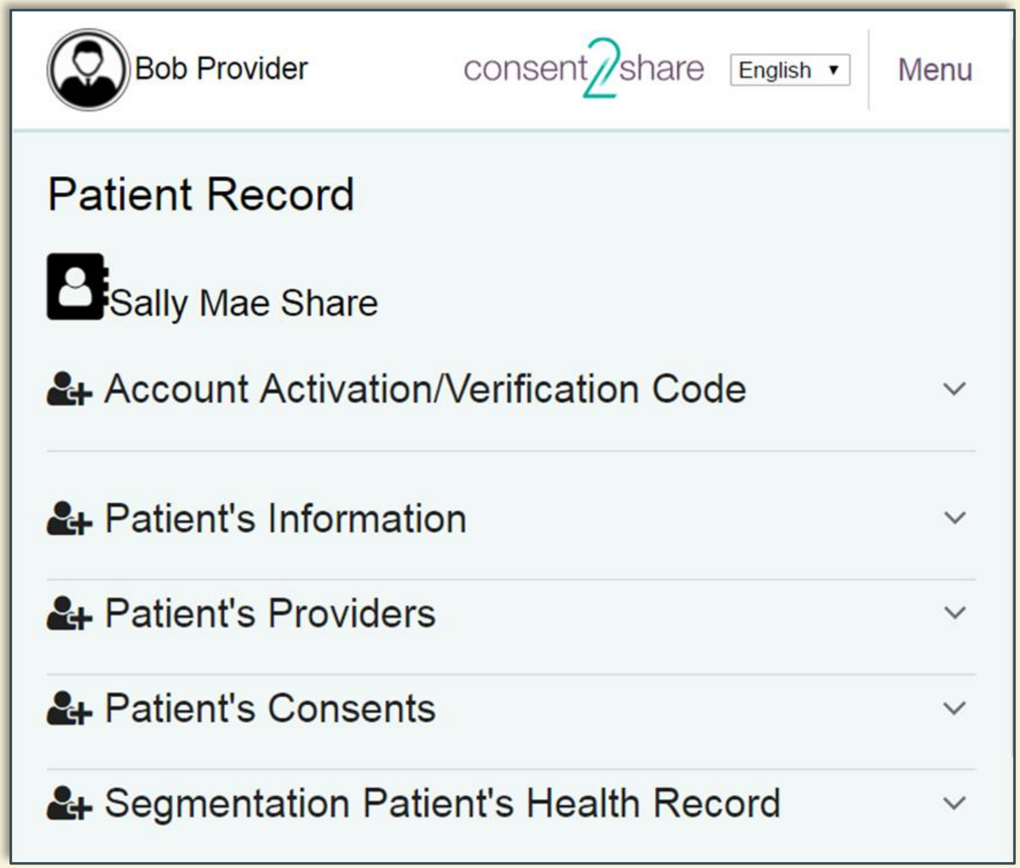
- You have now *created* a patient user account!
- The next step is to *activate* the account
- This can be done sending the patient an Account Activation Email and the patient activating the account
- The next few slides will illustrate that process



The Patient Record Page

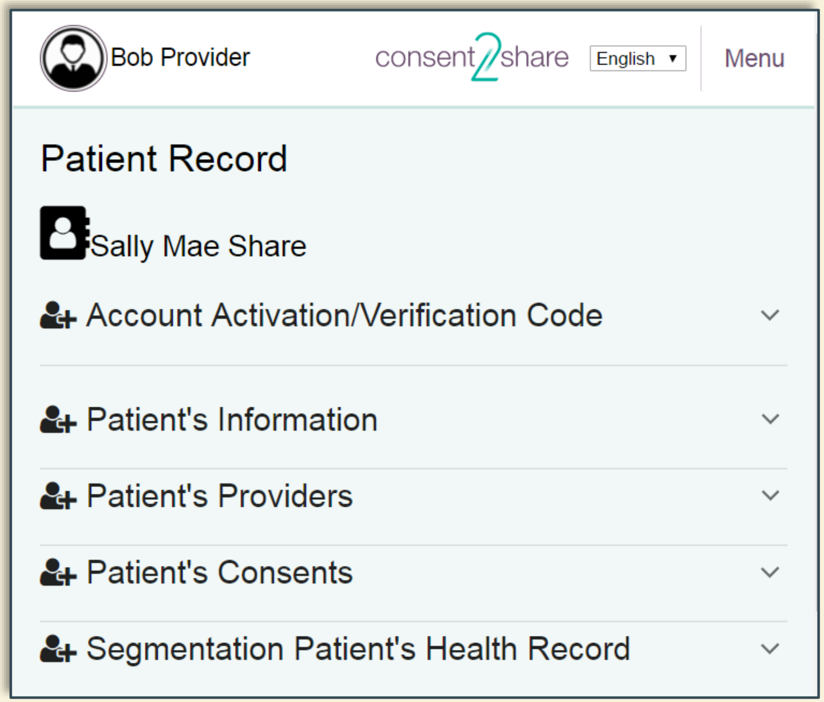
This is the Patient Record Page. Use it to:

- Send a patient Account Verification Email
- Review a patient’s health record
- View and add a provider
- Create a patient consent
- Segment a patient’s health record



Open Patient Record

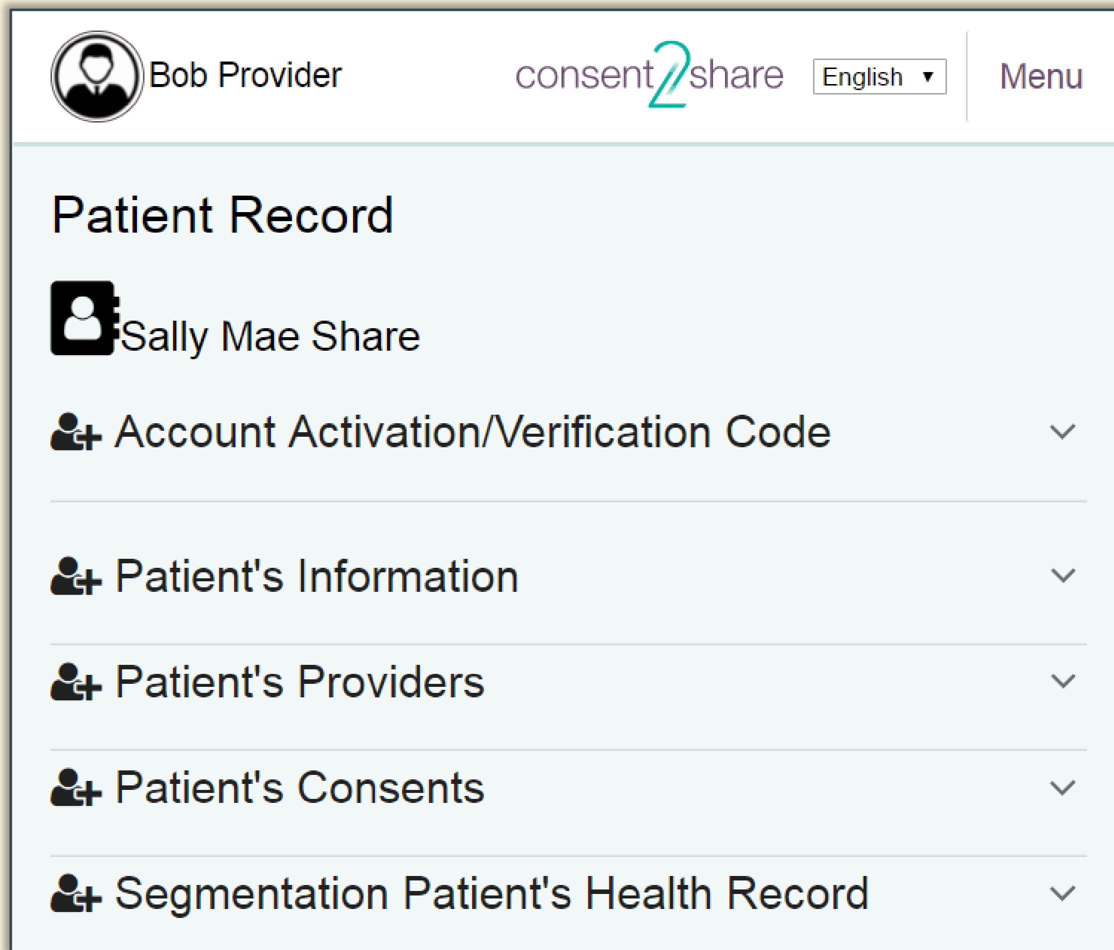
- To begin the activation process, first click on the Patient Card on the Create a Patient Account Page



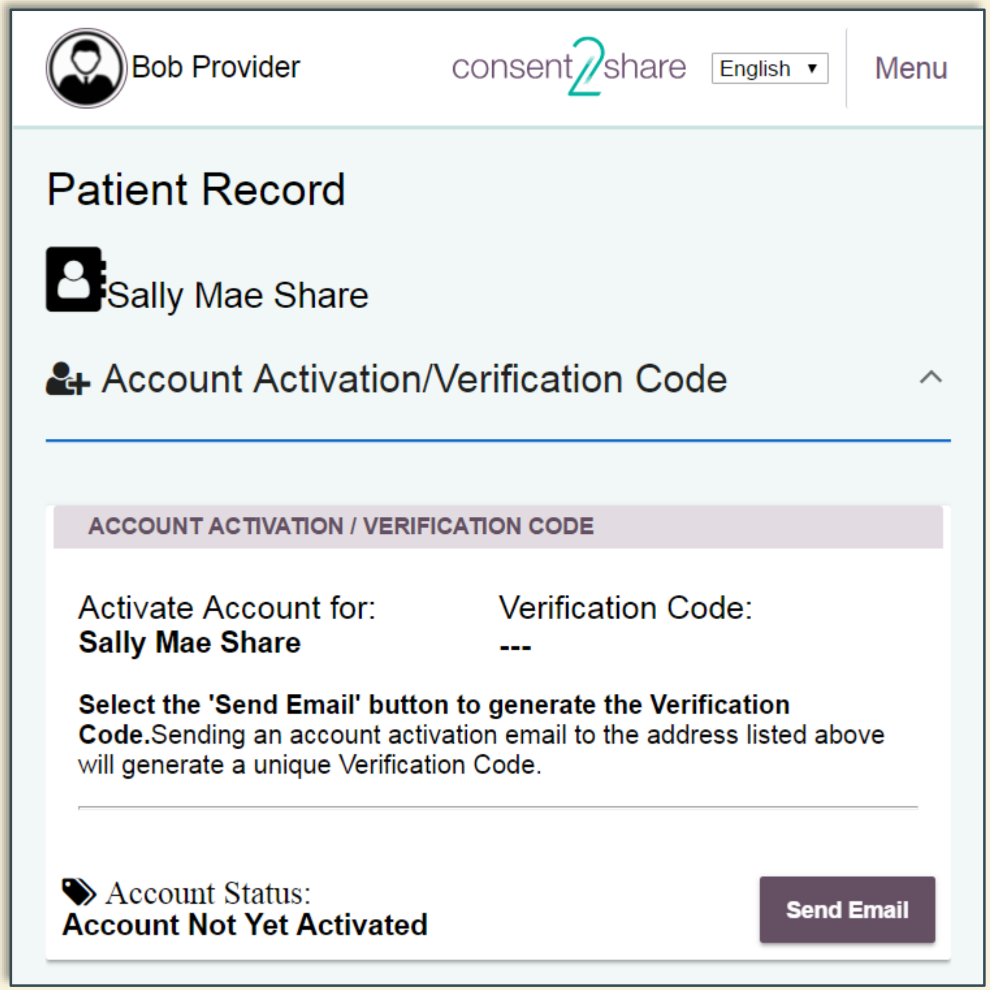
- This opens the patient's Patient Record Page

Open Account Activation Page

- On the Patient Record Page, click the Account Activation/Verification Code Link
- This will open an Account Activation/Verification Page

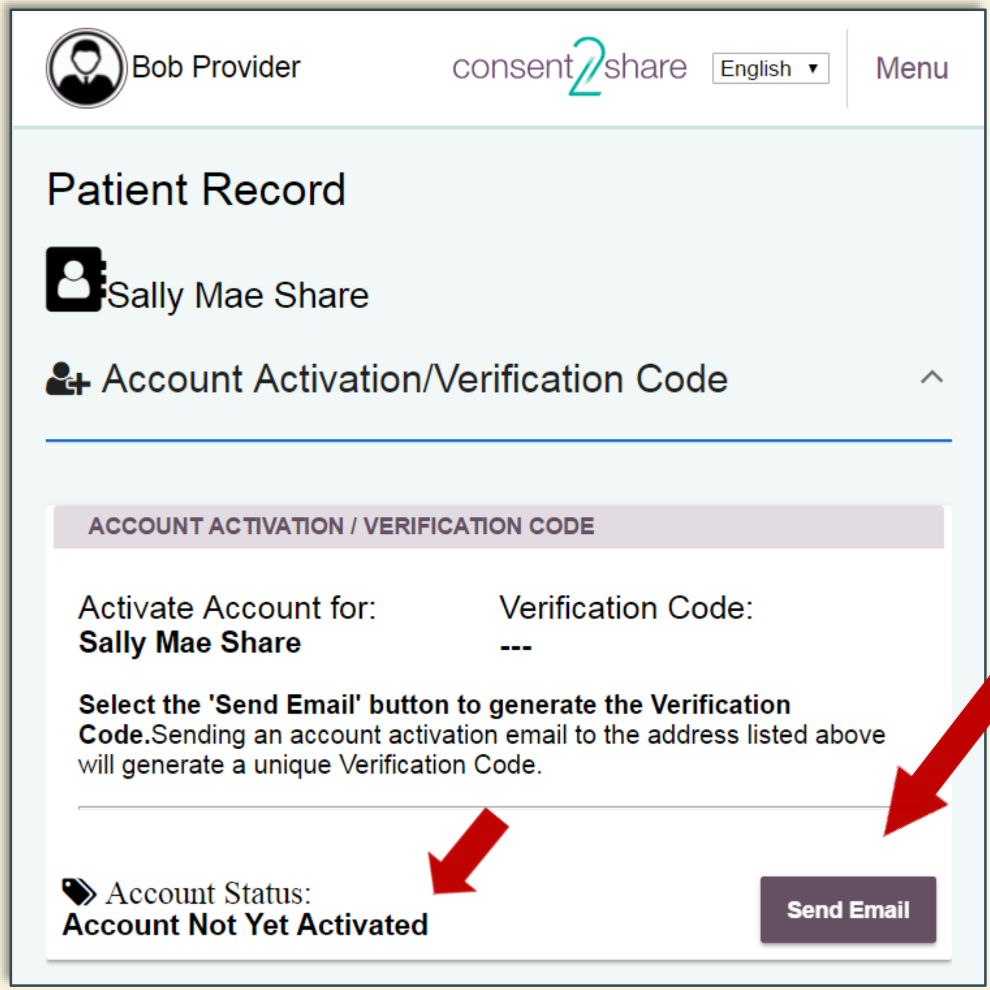


The Account Activation Page



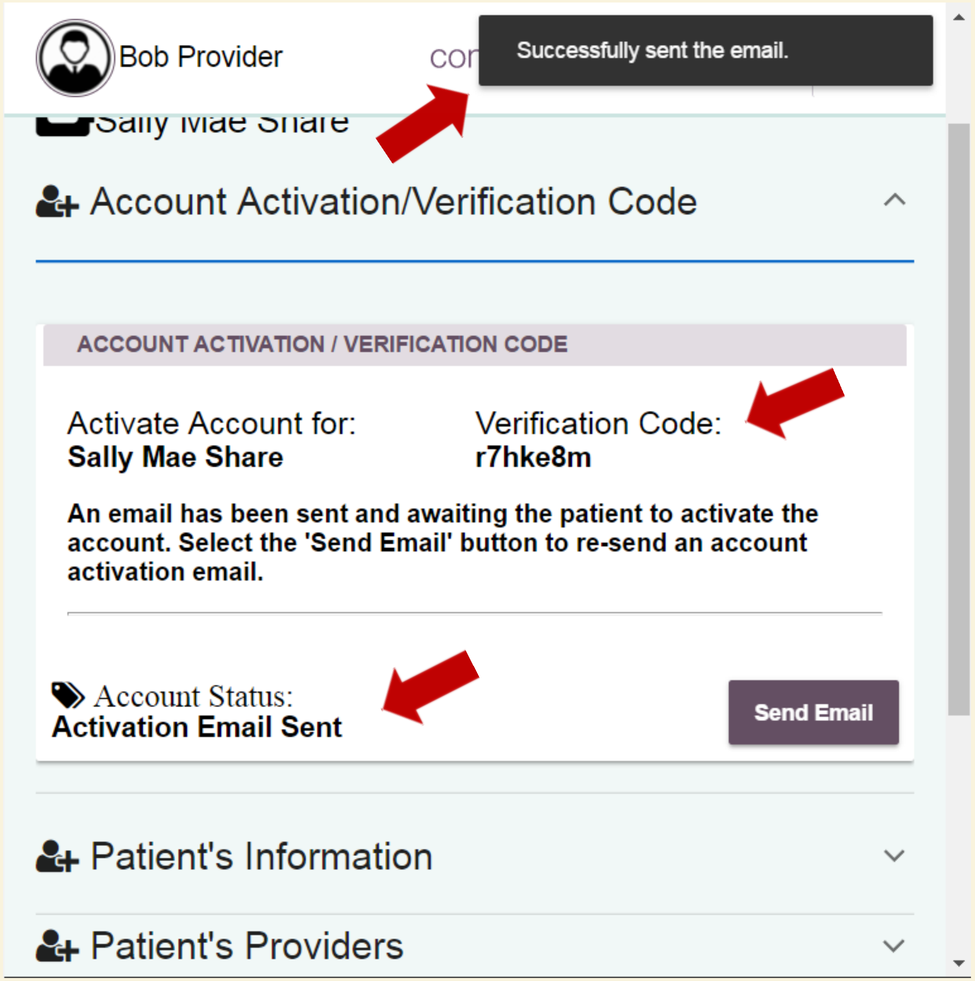
This is the Account Activation/Verification Code Page

Send Account Verification Email



- The Account Activation/Validation Code Page explains how to send an Account Activation Email to the patient
- Click the Send Email button to generate and email the Verification Code to the patient
- You can select language
- Note that the account is not yet activated

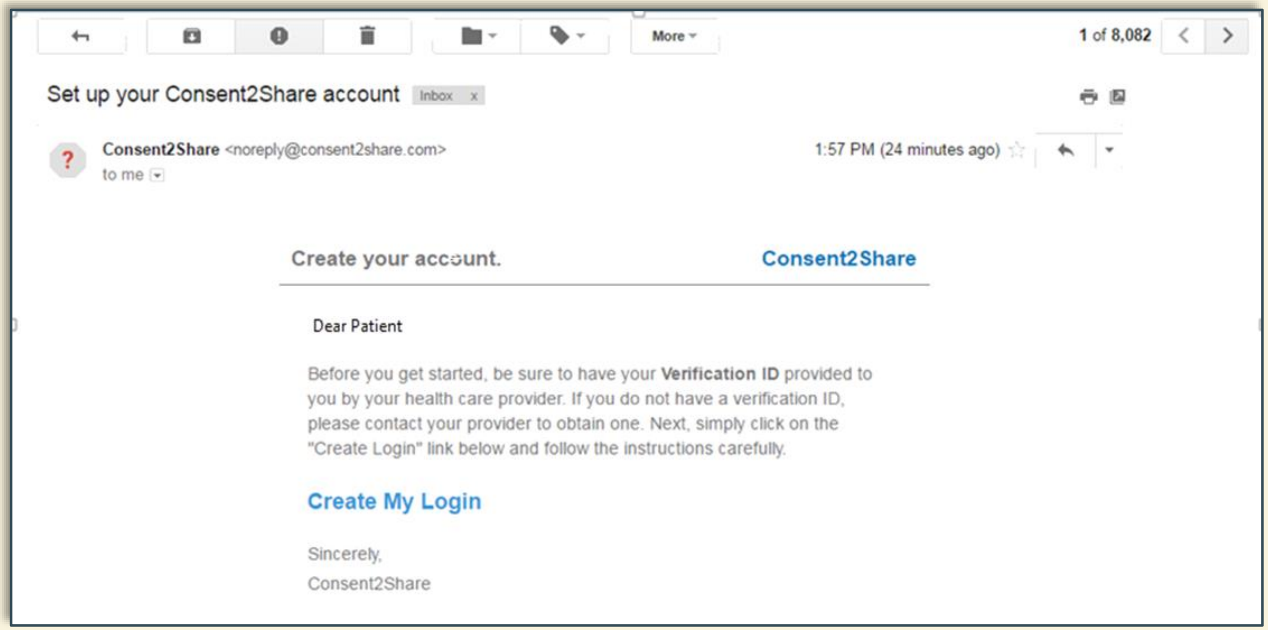
Notification of Sent Validation Code



- A verification pop-up at the top of the page will note that the email was successfully sent
- The system will generate and reveal the Validation Code
- The system will note that the Activation Email has been sent

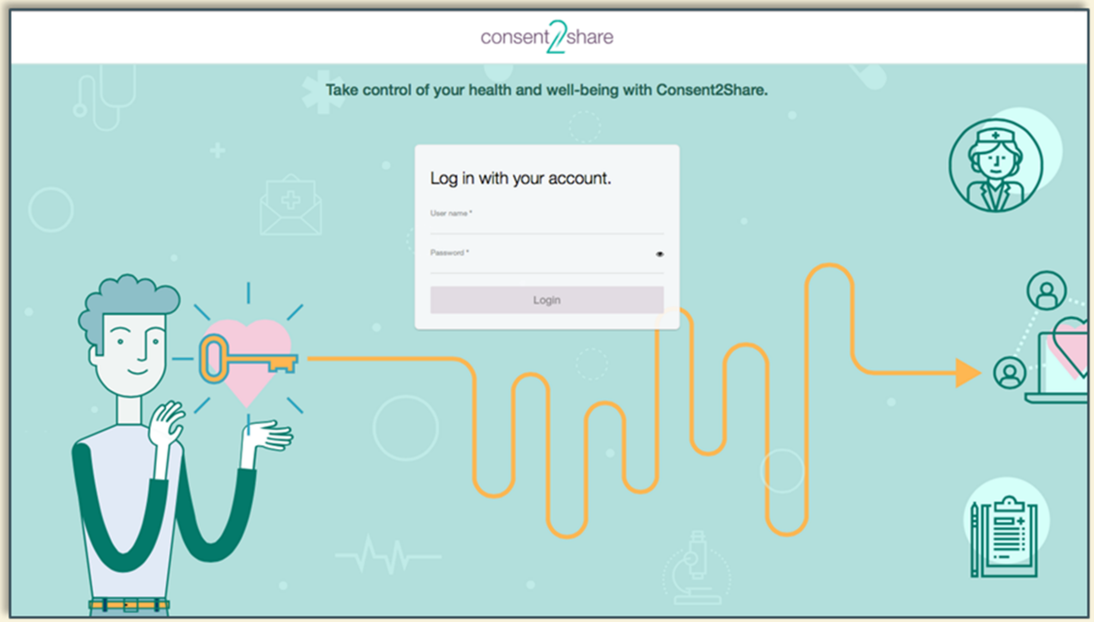
Patient Activates the Account

- The patient receives an Activation Email that has a link to Consent2Share, a secure token, and a Validation Code
- This allows the patient to enter Consent2Share, complete the account registration process, and activate his or her account



The Patient Account is Now Activated

- Once the patient has followed the instructions in the email and completed the account registration process, his or her account is now created and activated
- They can now use the patient version of Consent2Share

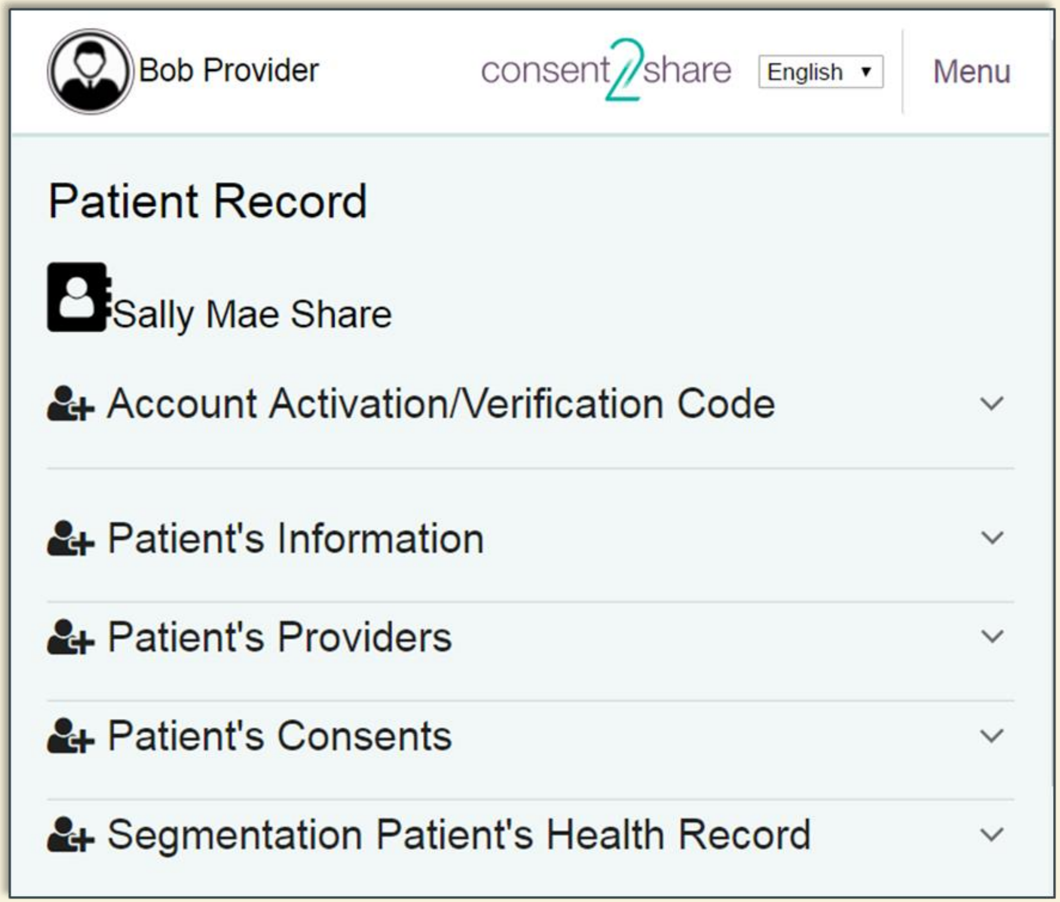


Section 4: Add Providers

- Your patients likely have multiple health care providers
- These may include primary care, mental health, addiction treatment, and specialty providers such as dermatologists
- Consent2Share enables patients to share all or part of their health information among their providers
- Thus, patients’ providers must be added to their accounts
- Patients can do this themselves and you can do it on their behalf
- The next few slides show how to add providers to their accounts

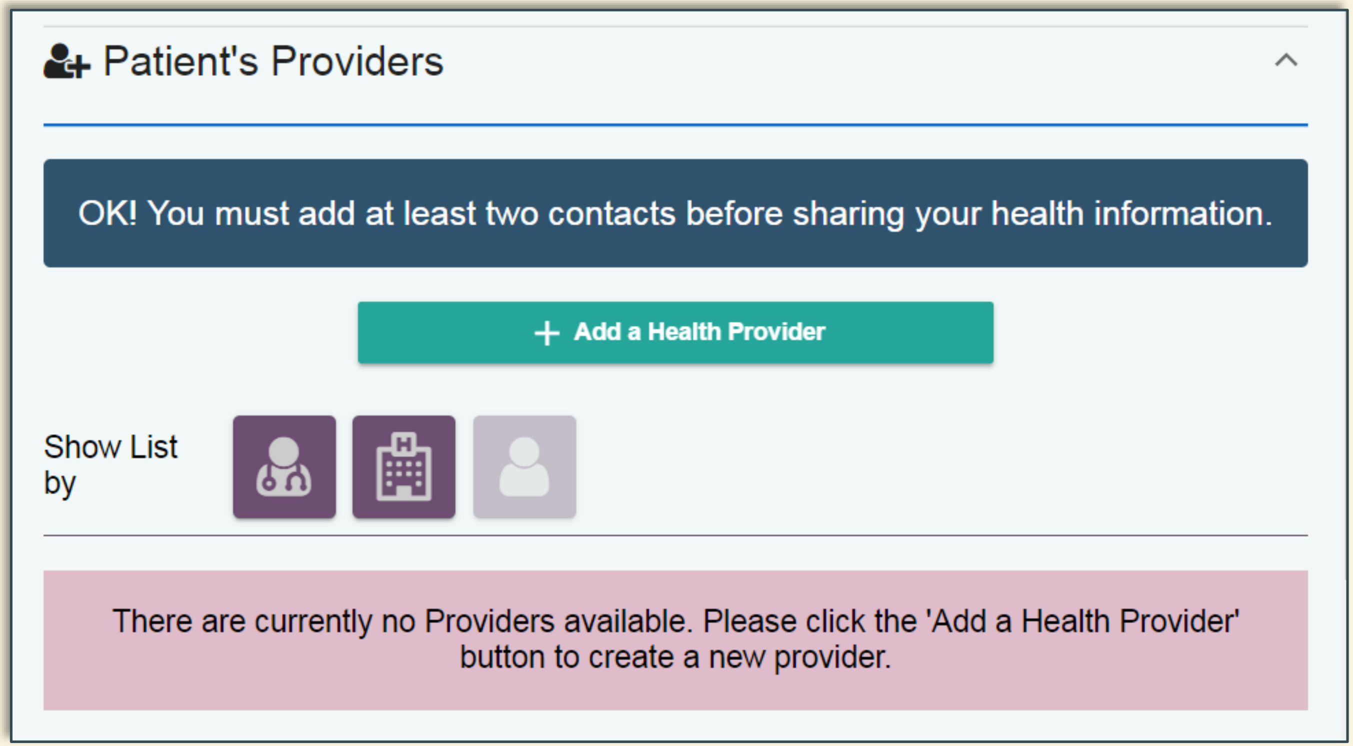
Add First Provider

- The first step is to add the first provider
- At the patient's Patient Record Page, select the Patient's Providers Link



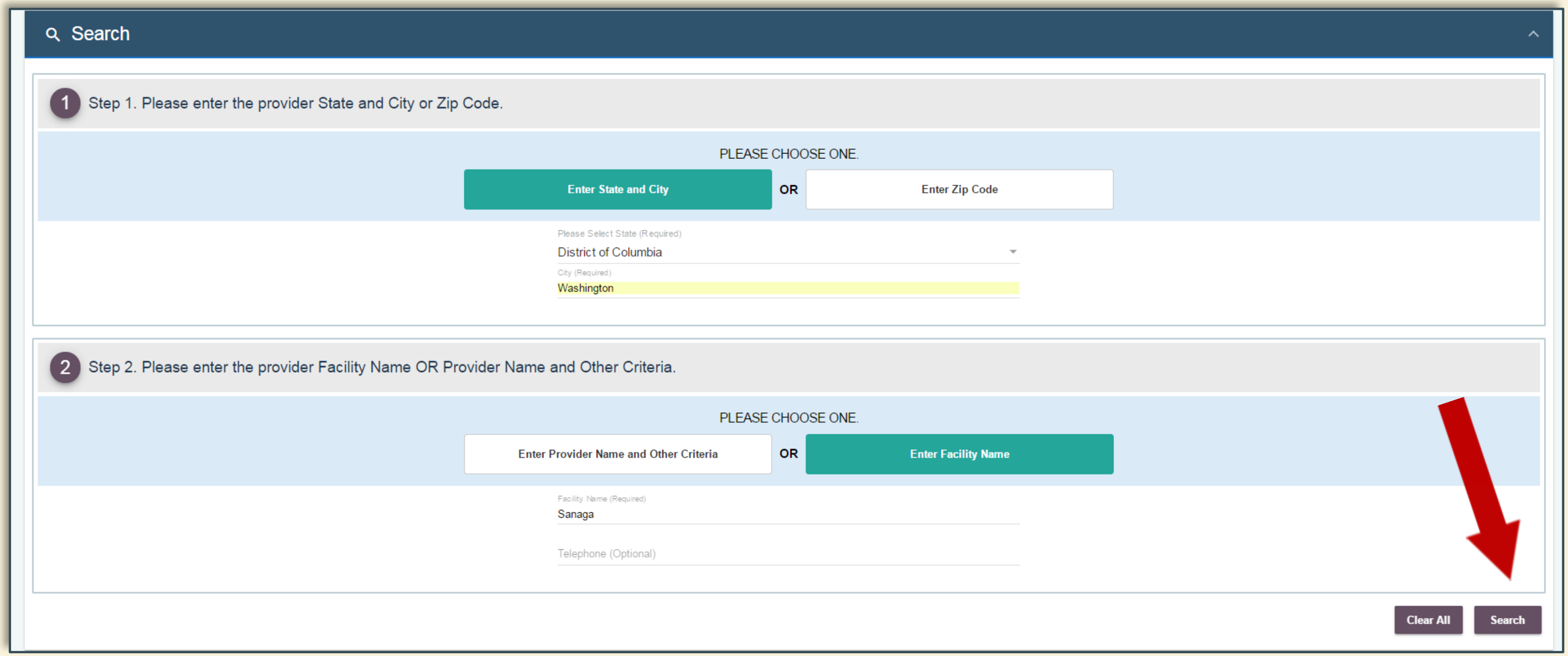
Add First Provider

- This will open the Patient’s Providers Page
- You can see that the patient does not yet have any providers
- Click the Add a Health Provider button



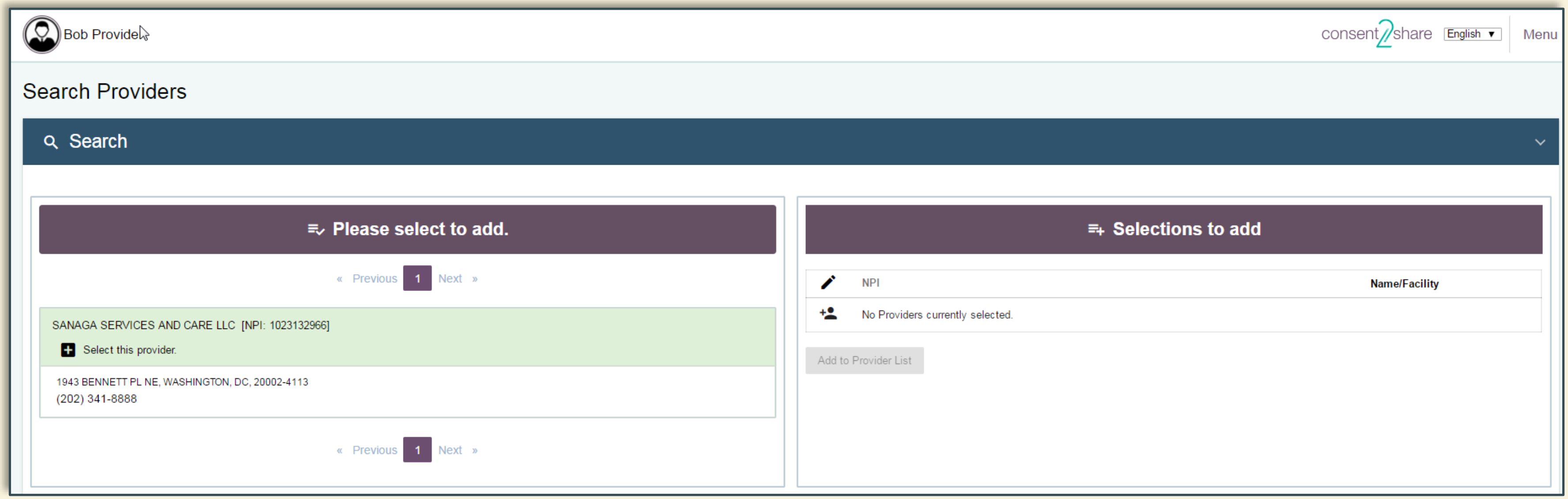
Search for First Provider

- This will open the Search Providers Page
- Follow the instructions to search for the first provider
- When finished, click the Search button



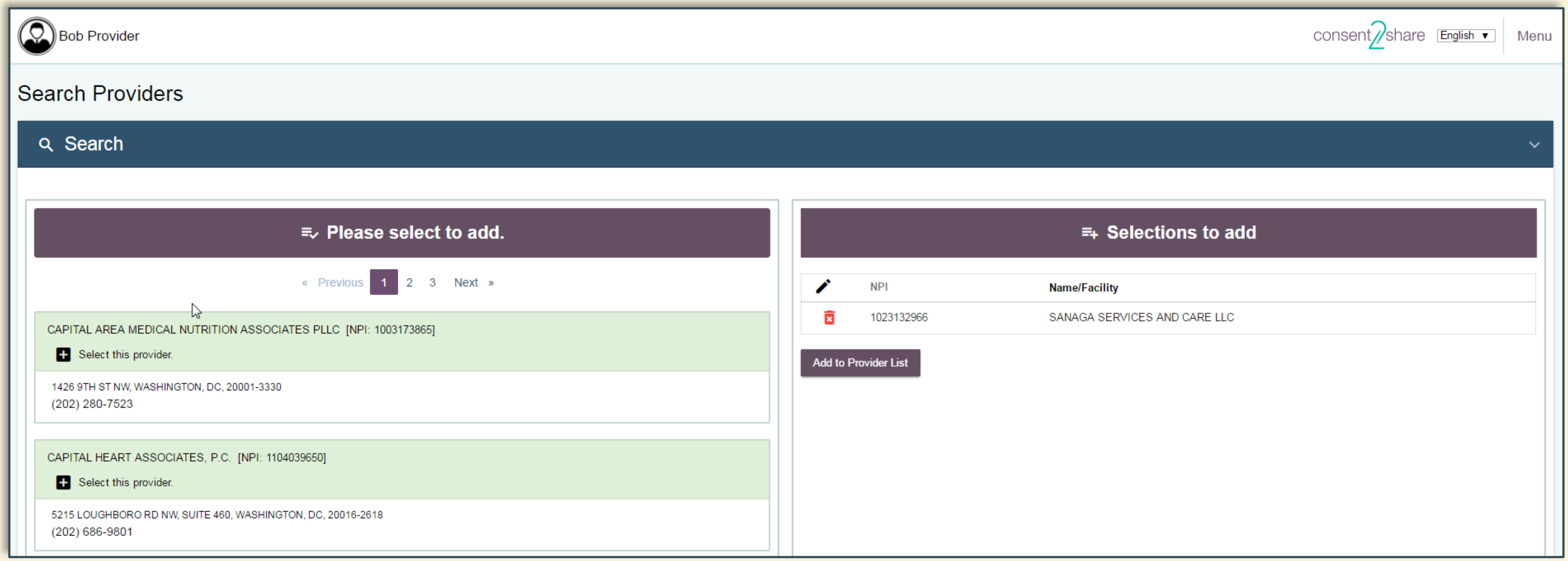
Search for Second Provider

- After searching for the first provider, a Search Results page opens
- Now, click the Select This Provider + button to add the provider
- Note that the provider is temporarily added to the system



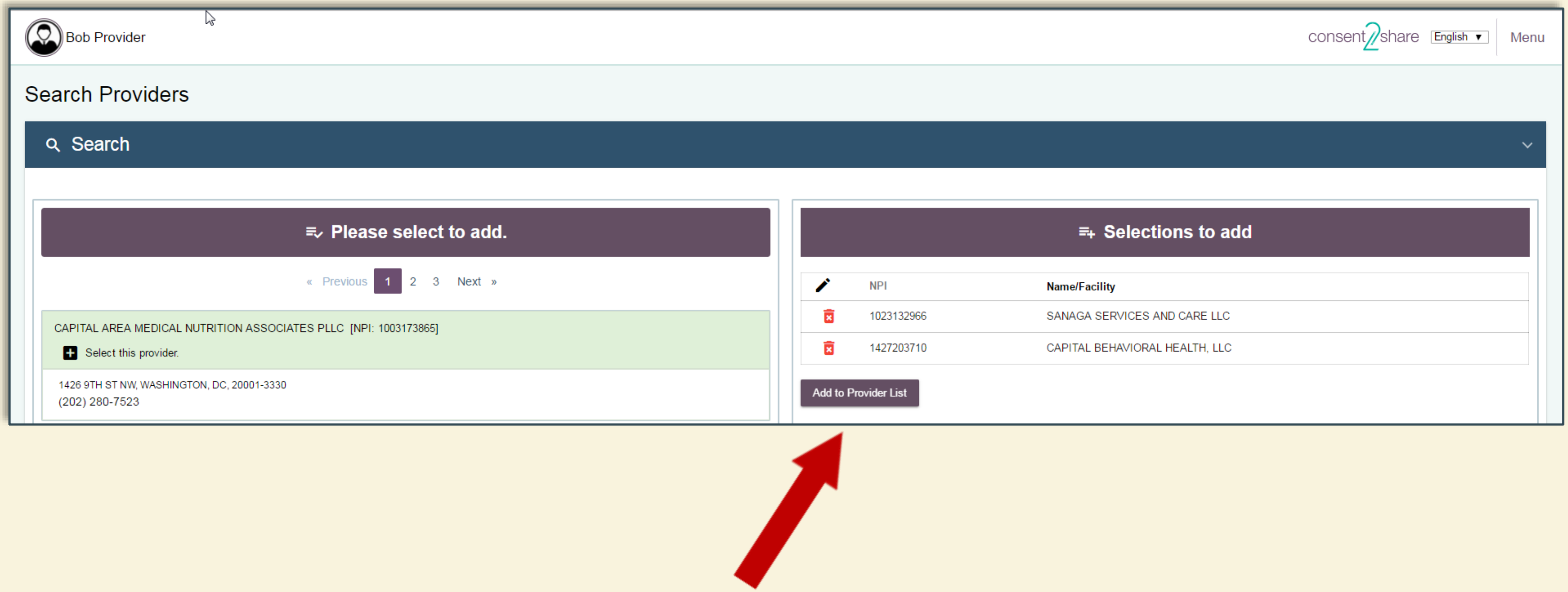
Search for More Providers

- Now, you can use the Search function to add additional providers
- In the example below, several providers appear
- Again, click the Select This Provider + button to add the provider



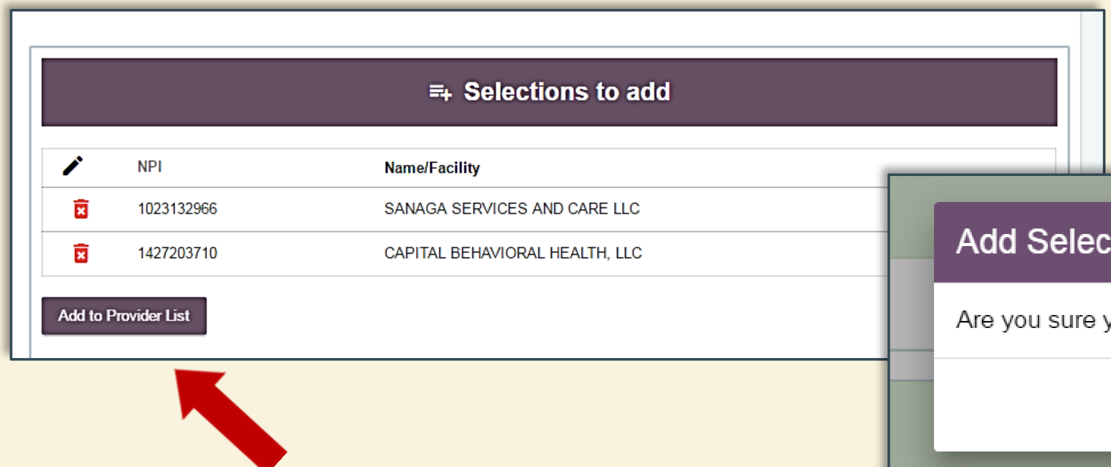
Add to Provider List

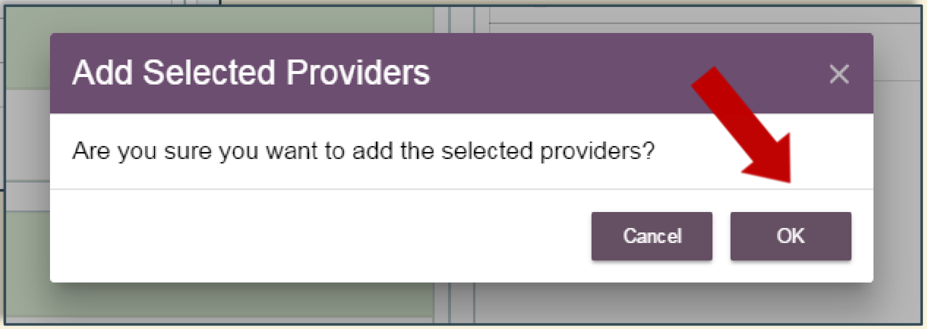
- We have now selected two providers
- They appear in the Selections to Add section
- Now, click the Add to Provider List button



Add to Provider List

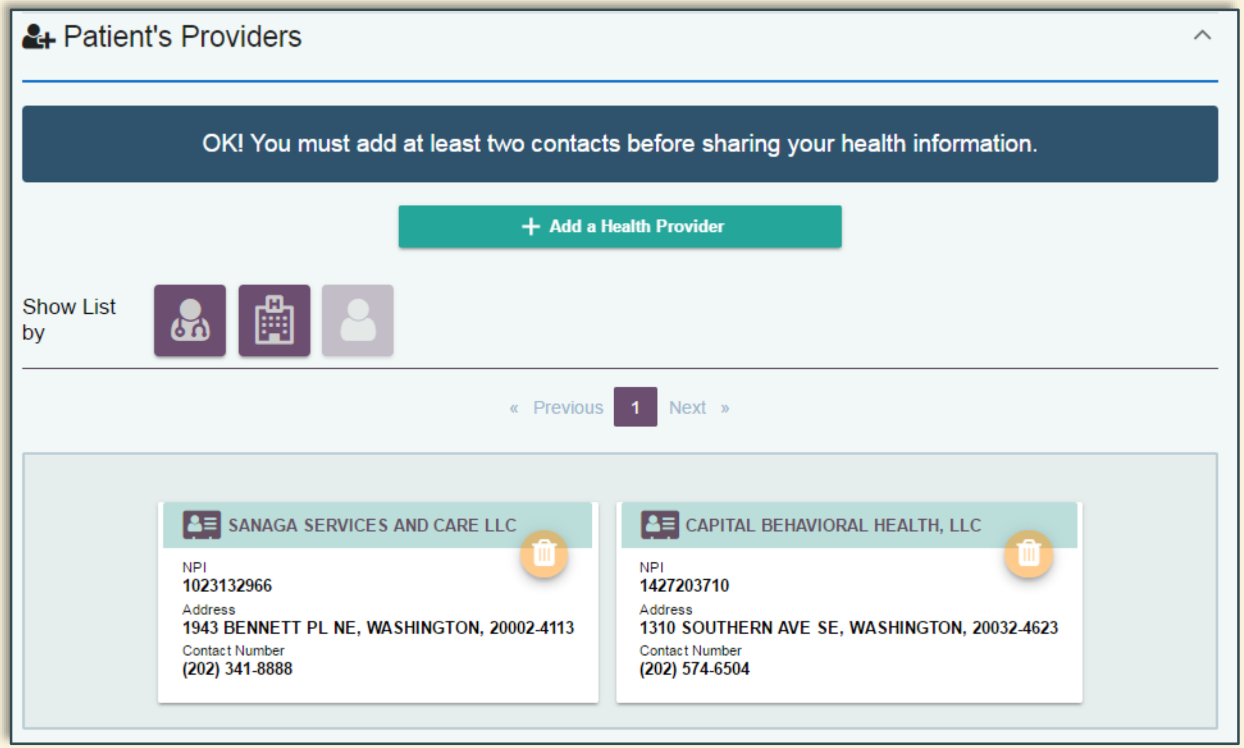
- We have now selected two providers to add
- They appear in the Selections to Add section
- Now, click the Add to Provider List button
- A message will ask if you want to add the selected providers
- Click the OK button





View Results

- Click on the Patients' Providers link on the Patient Record Page
- You can see two providers were added to the patient's account
- Now, information can be shared between the two providers



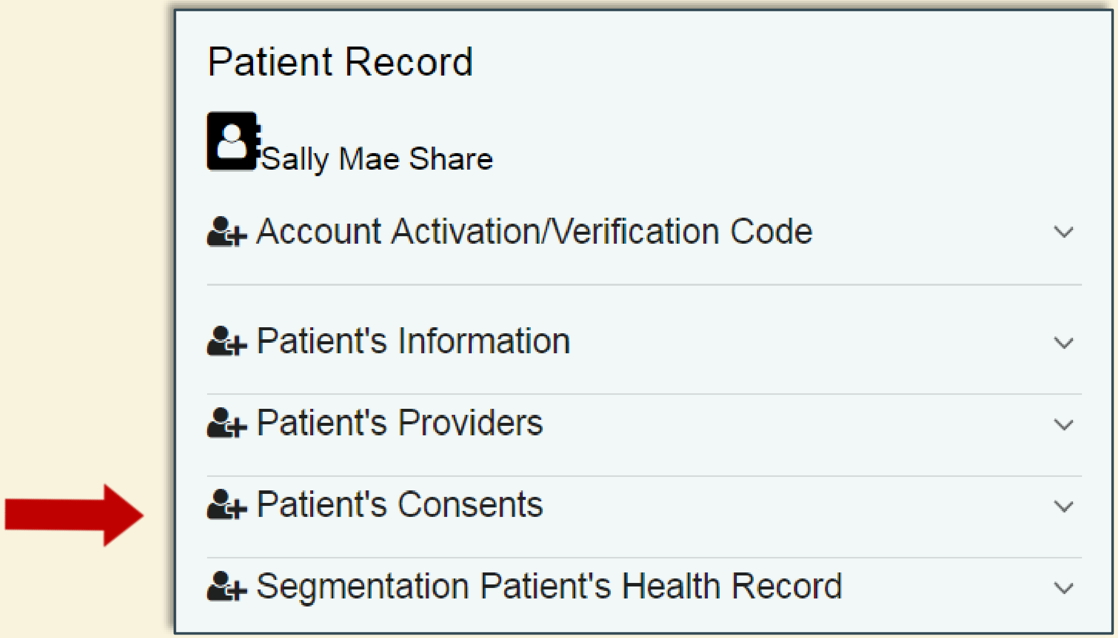
Section 5: Create a Consent

On behalf of patients, providers can use the consent feature to:

- Choose to share all or parts of patients’ health records
- Choose the reason for sharing your patients’ health records
- Select how long records will be shared with a provider
- The next few slides will walk you through the process

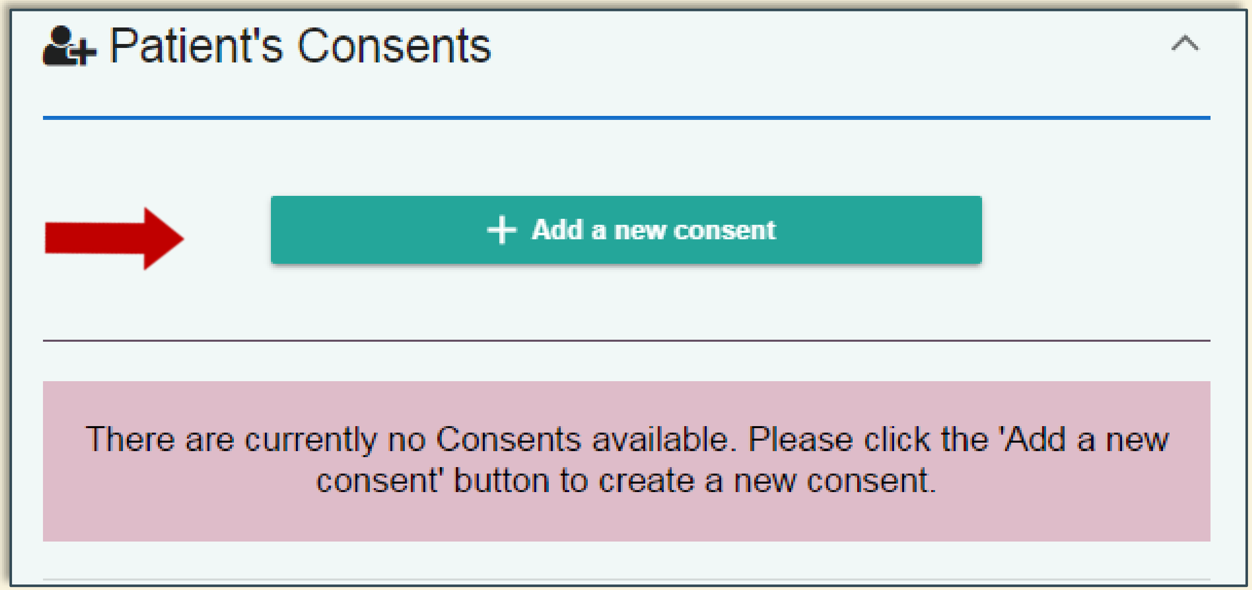
Select Patient’s Consents Link

- In practice, each patient will have multiple providers
- For this guide, we have added two providers
- Now we can create a consent between these providers
- First, click the Patient’s Consent Link on the Patient Record Page

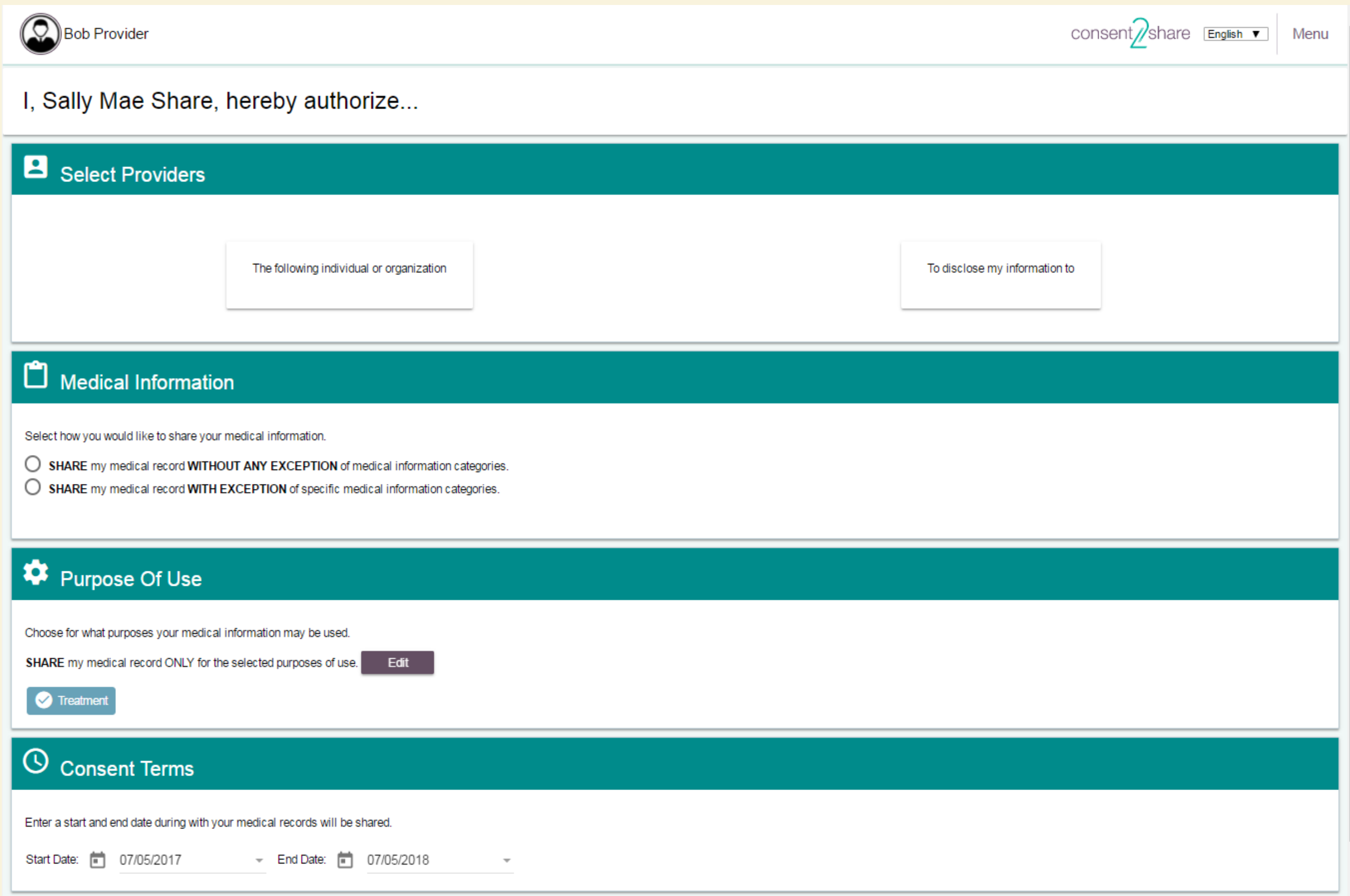


Click the Add New Consent Button

- If no consents exist yet, the system will alert you of that fact
- Next, click the Add a New Consent Button
- The Consent Page will open, as shown on the next slide

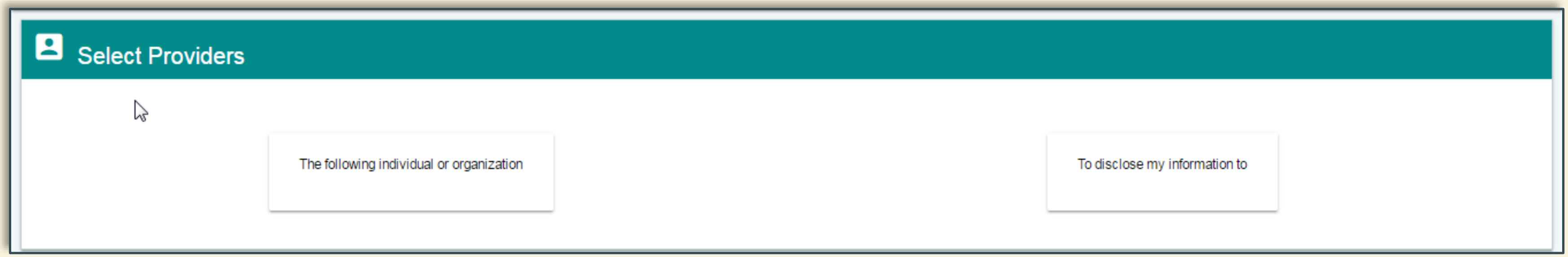


The Consent Page



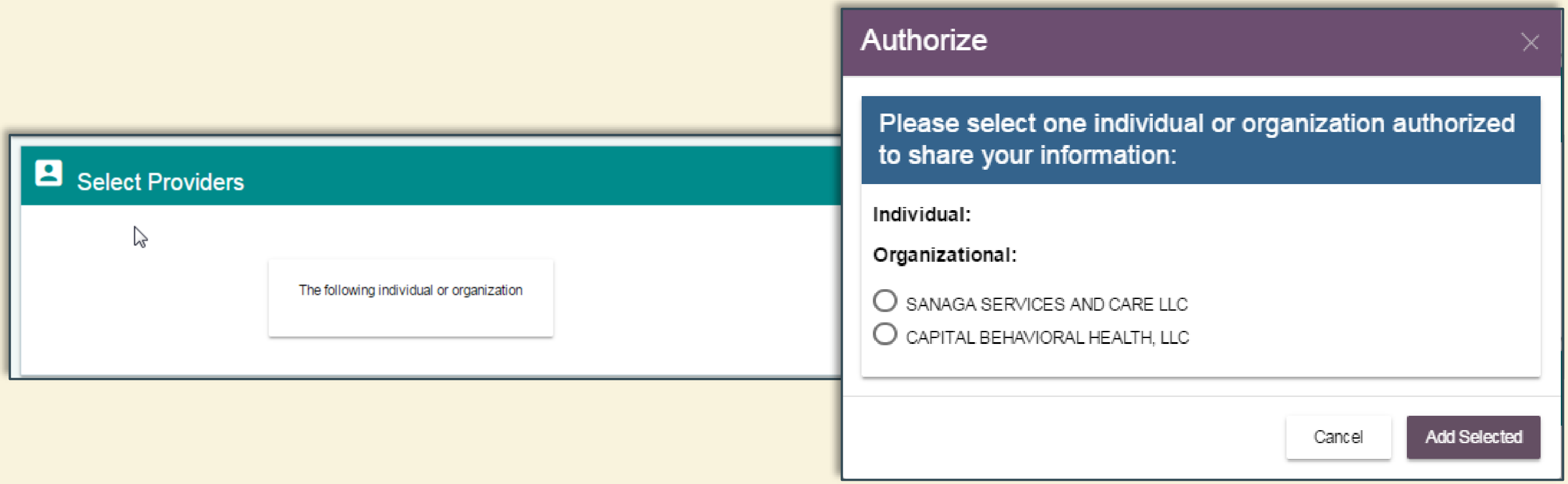
Step 1: Select Providers

- You will need to select the “From” and “To” providers



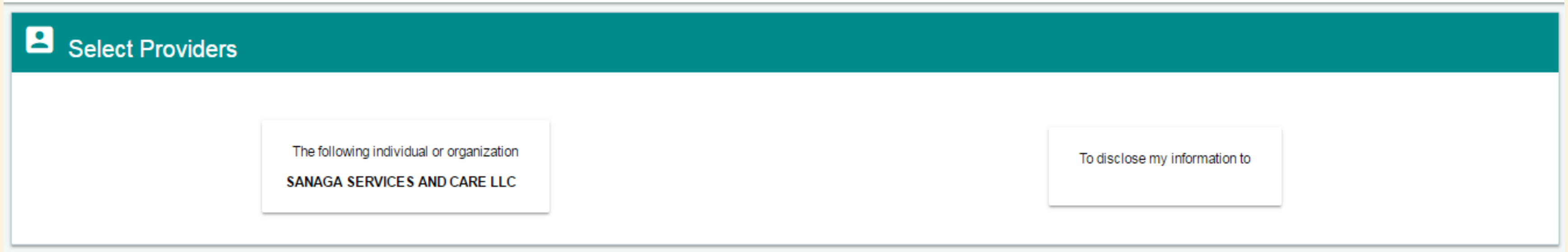
Select the "From" Provider

- First, select the "From" organization box
- When you do, a pop-up box will open
- Select the organization **from whom** you wish to share
- We will choose Sanaga Services and Care



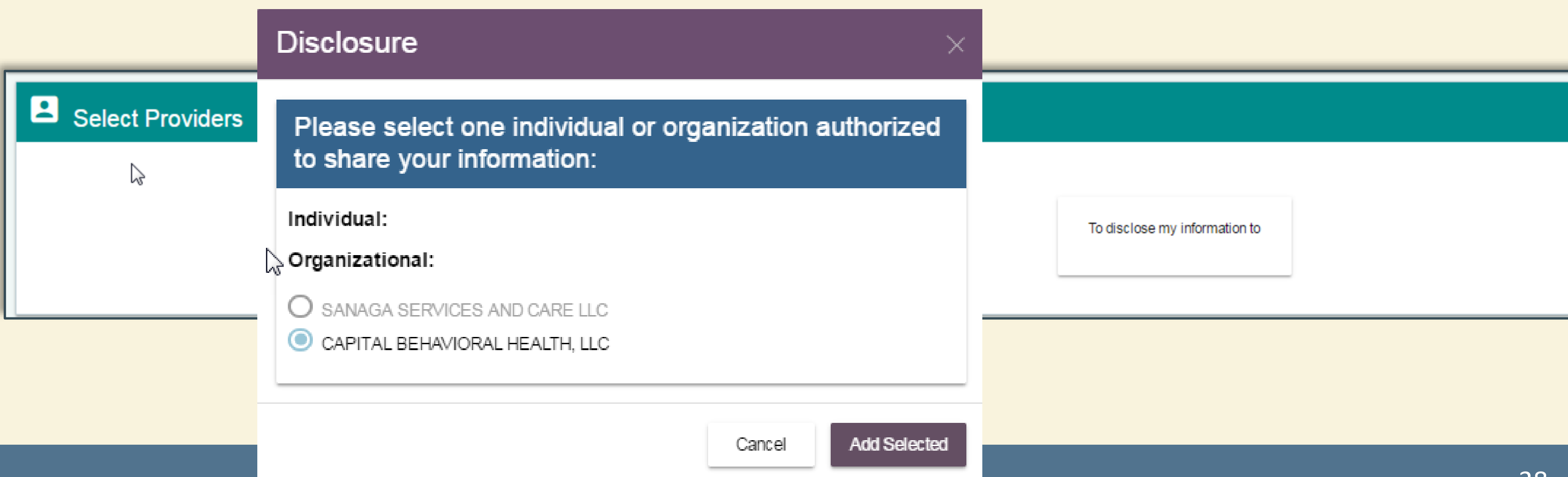
“From” Provider Populates

Now Sanaga Services and Care populates the “From” provider box



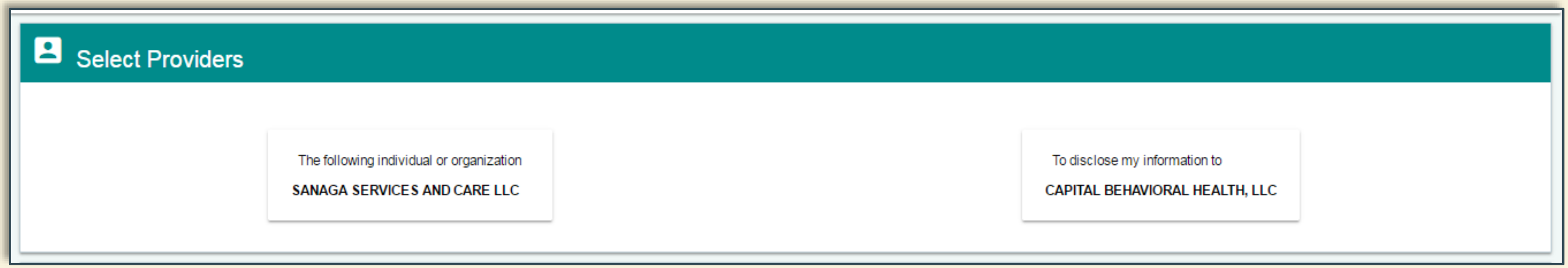
Select “To” Provider

- Next, select the “To” organization
- When you click the “To” box, a pop-up box will open
- Select the organization **to whom** you wish to share
- We have chosen Capital Behavioral Health



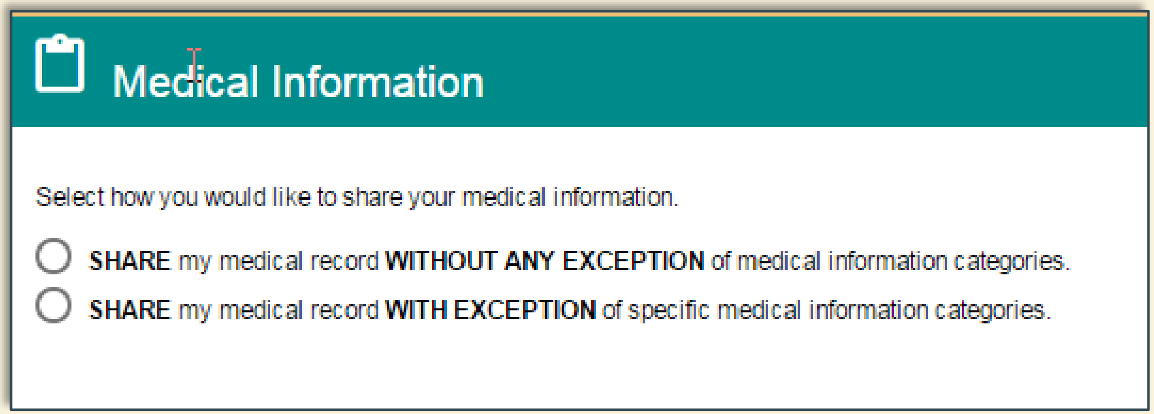
Chose “To” Provider

Now it populates the “To” provider box



Step 2: Select Medical Information

- Next, select how you would like the information to be shared
- You can choose:
  - ✓ Share my medical record without any exception of medical information categories or
  - ✓ Share my medical record with exception of specific medical information categories

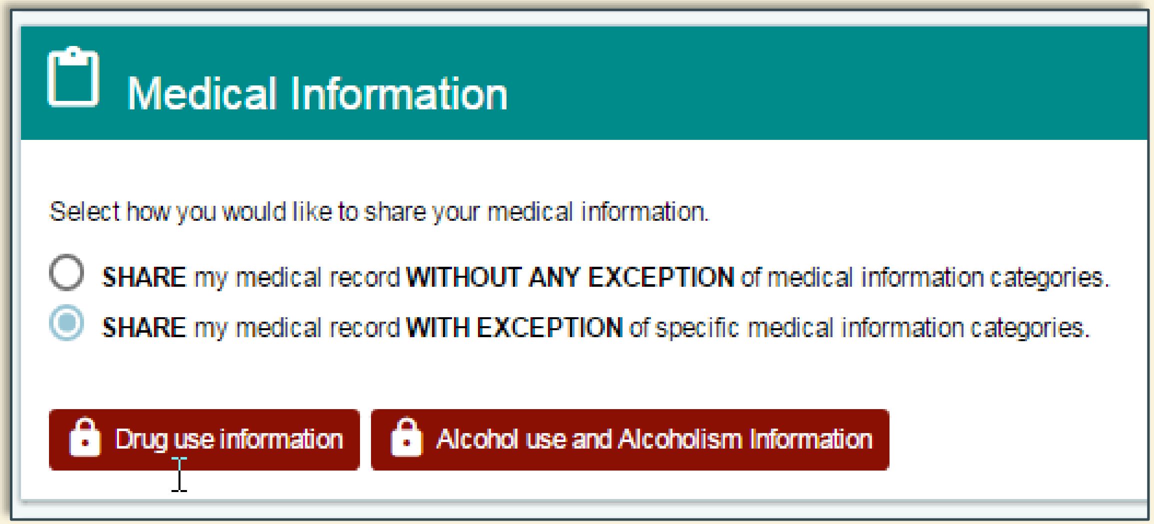


Select Medical Information

- We have chosen to share medical records with exceptions
- A Privacy Settings box allows selecting sensitive information categories
- We will choose to share the first two categories: drug use, alcohol use, and alcoholism information
- Click the Save Changes button

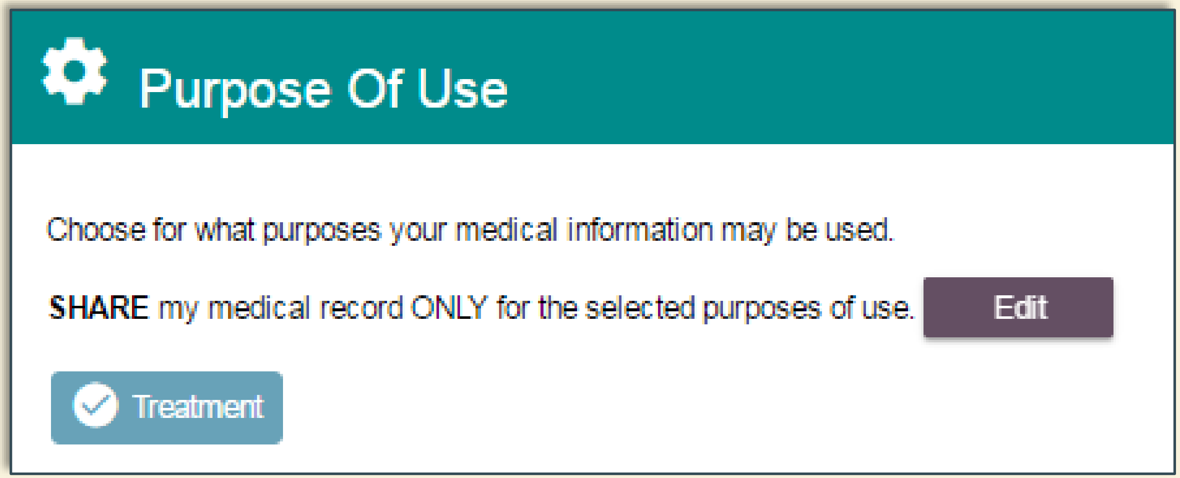
Select Medical Information

- After making our choice, the system shows that we have chosen to share:
  - ✓ Drug use Information and
  - ✓ Alcohol use and Alcoholism Information



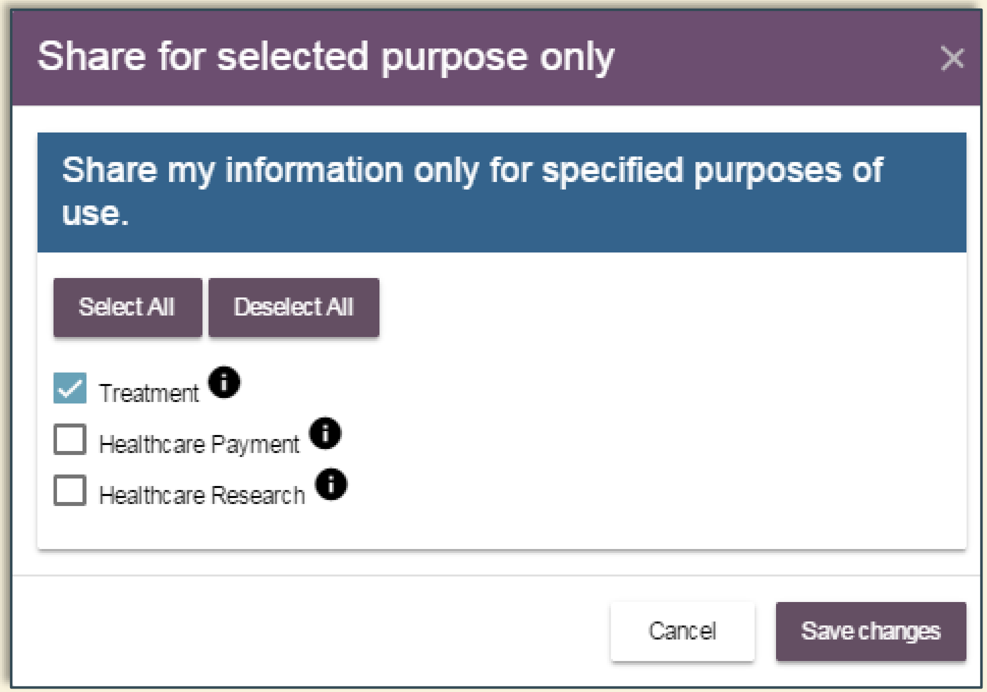
Step 3: Select Purpose of Use

- Next, select Purpose of Use
- The default setting is "Treatment"
- For most patients, this will be the most appropriate setting



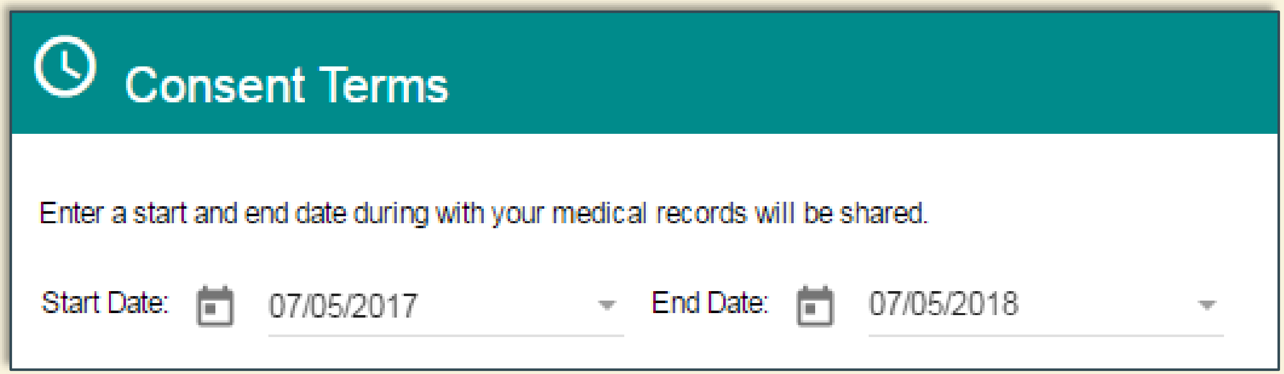
Edit Purpose of Use

- If the Edit button is chosen for Purpose of Use, a pop-up window will open
- It will allow you to Select All or Deselect All for:
  - ✓ Treatment
  - ✓ Healthcare Payment
  - ✓ Healthcare Research



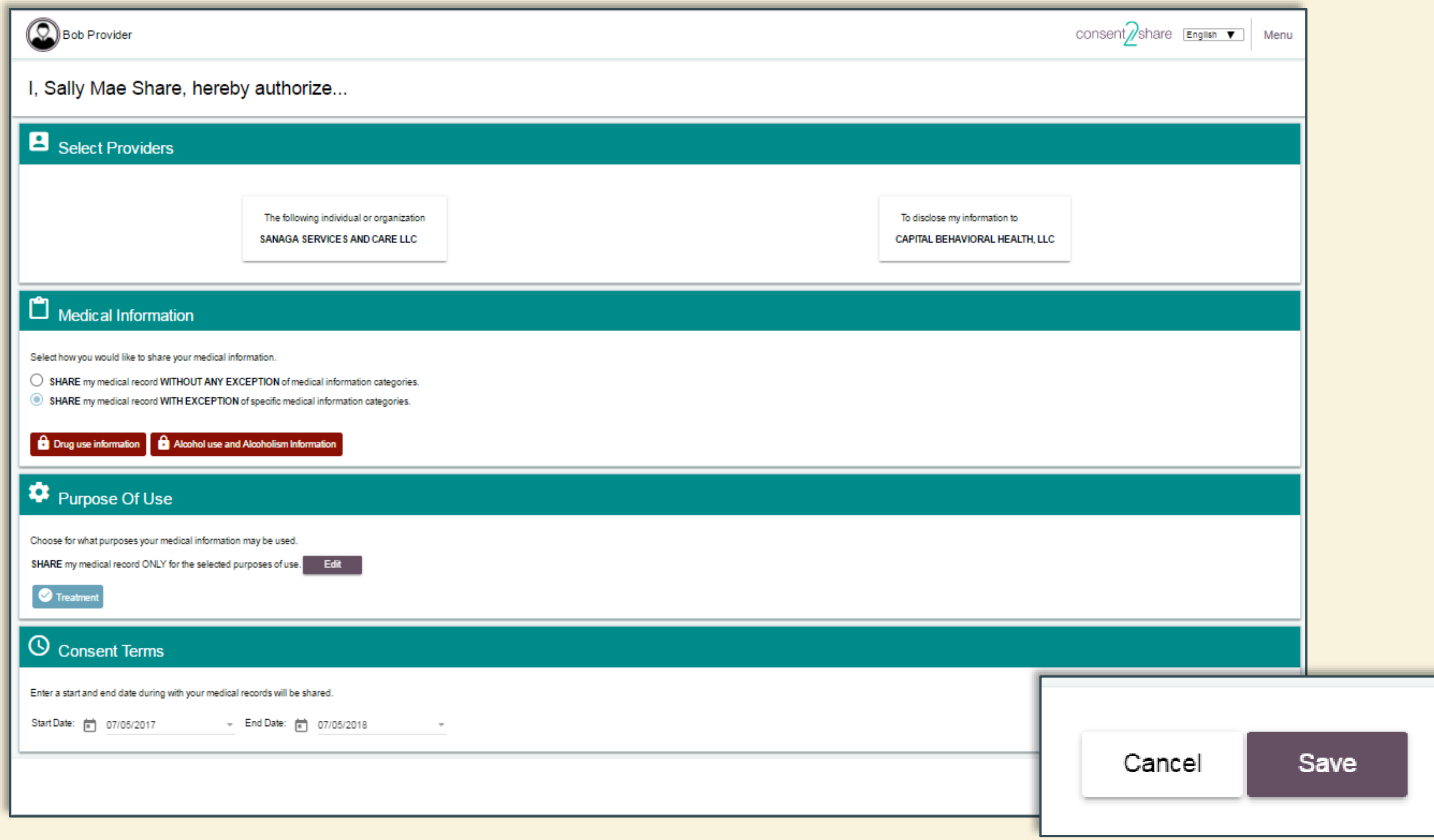
Step 4: Select Consent Terms

- Next, select a start date and an end date during which the patient's medical records will be shared
- By default, the system will select today's date as the start date
- The system will select an end date one year in the future
- You can choose to edit the start and end dates as needed



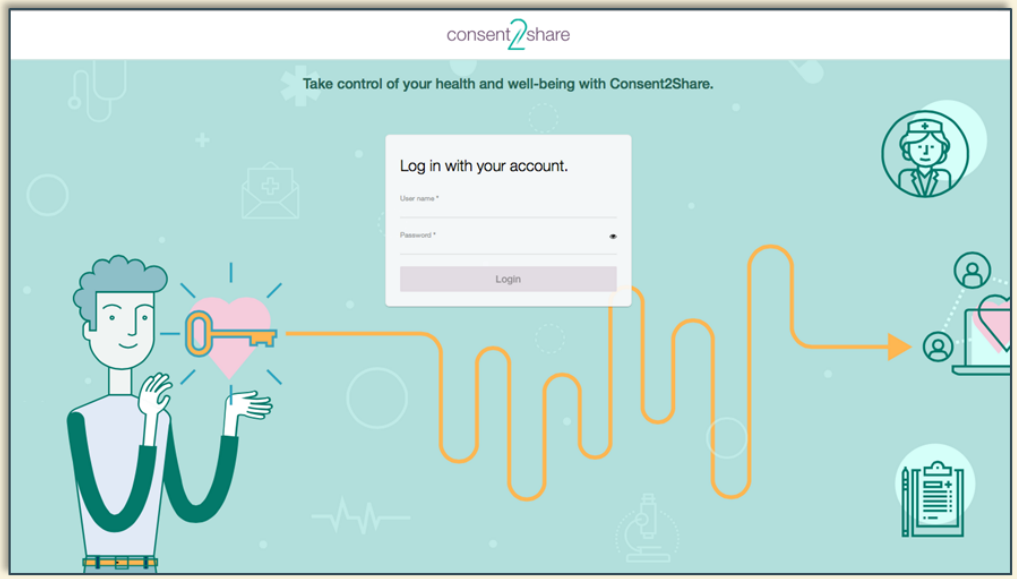
Step 5: Click the Save Button

Click the Save button to save all of the settings



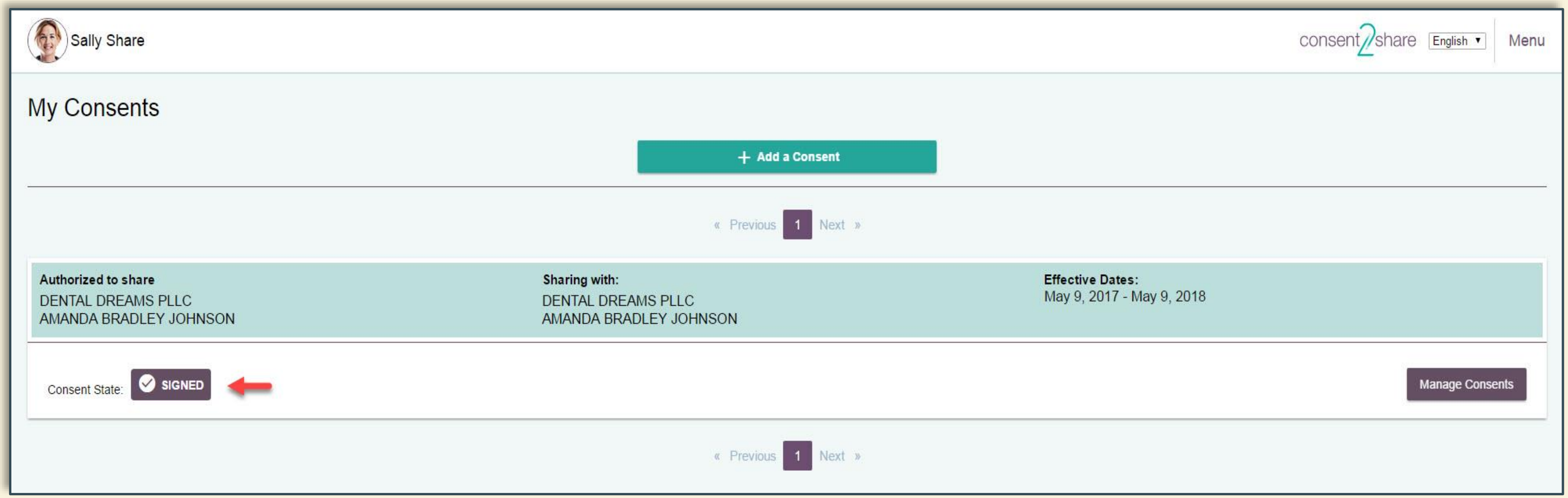
Patient Step 6: Patient Signs Consent

- The provider can *create* patient consents in Consent2Share
- However, the patient must *electronically sign* his or her consents
- To do so, the patient must have activated his or her account
- The following *Patient Step* slides show the steps patients take
- First, they enter the Consent2Share Patient Portal



Patient Step 6.1: Consent Management

- Patients can view his or her My Consents Page
- It shows status of all the consents created
- Clicking on the Manage Consents button opens up pop-up window to help patients manage their consents



Patient Step 6.2: Signs Attestation Box

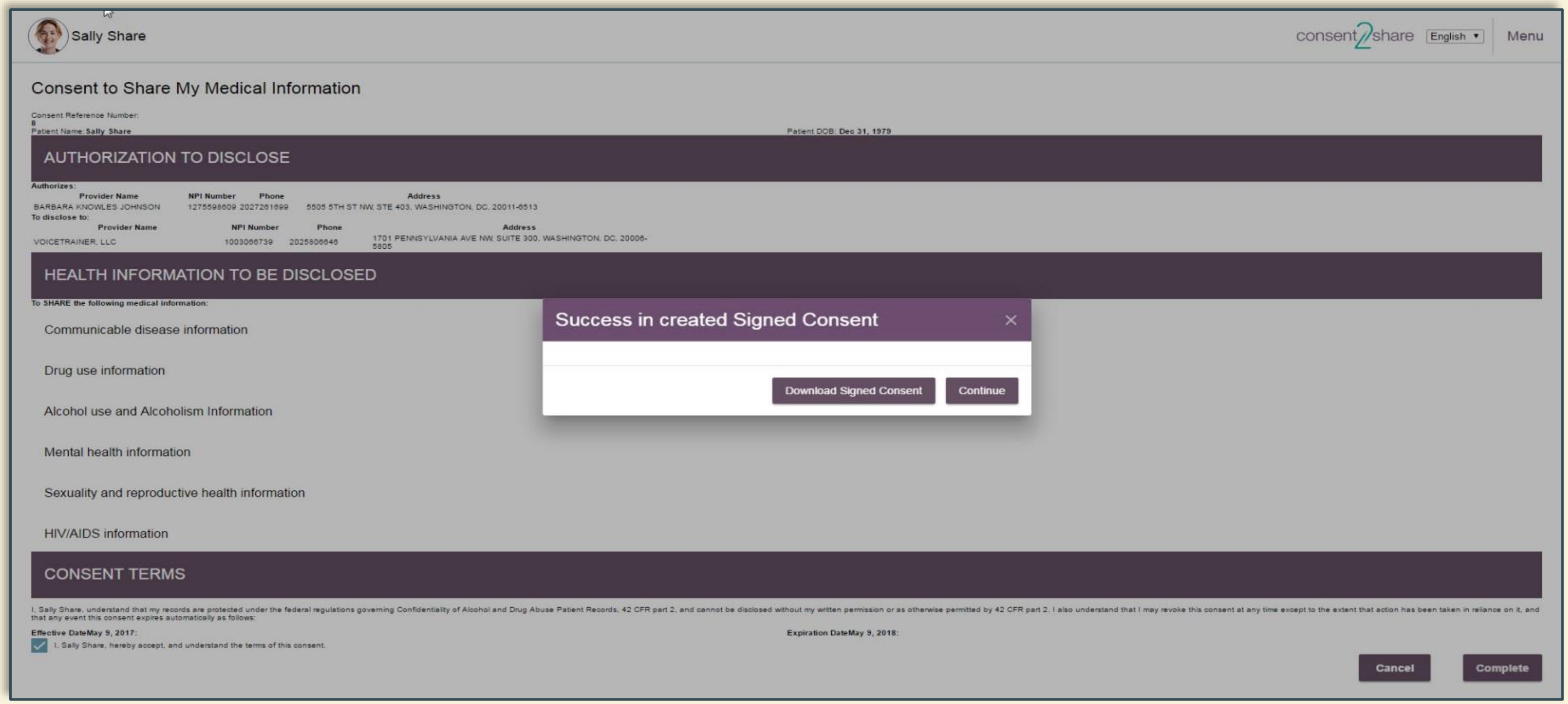
Patients can then check the Consent Terms shown below

Patient Step 6.3: Provides eSignature

- From the List Consents Page, patients click on Manage Consents
- From the Consent Options pop-up window, they can select Provide eSignature
- That brings patients to the Consent to Share My Medical Information Page

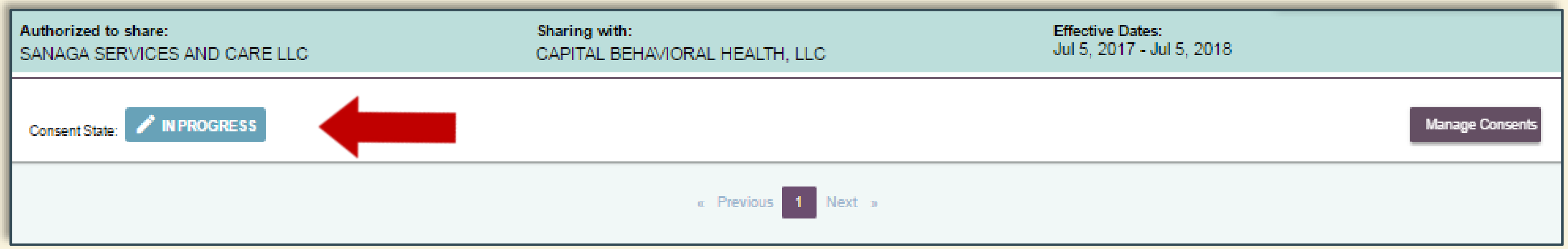
Patient Step 6.4: Receives Confirmation

Patients click the Complete button after authenticating
They have created a consent by electronically signing it
They will receive a pop-up consent success notice



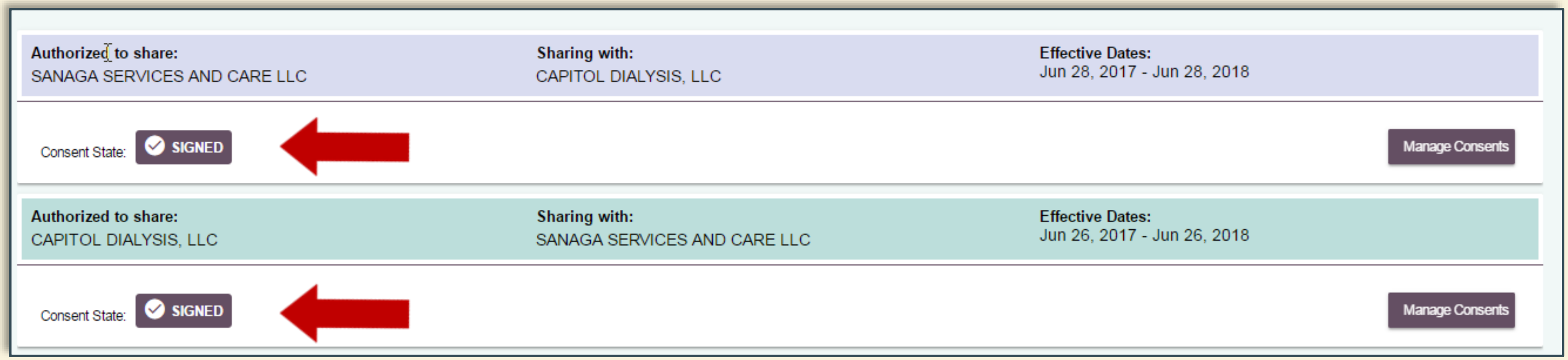
Before Patient Signs Consent

Before the patient signs the consent, the consent status will be shown as “In Progress”



After Patient Signs Consent

- After the patient signs the consent, a "Signed" icon will show that the consent has been signed

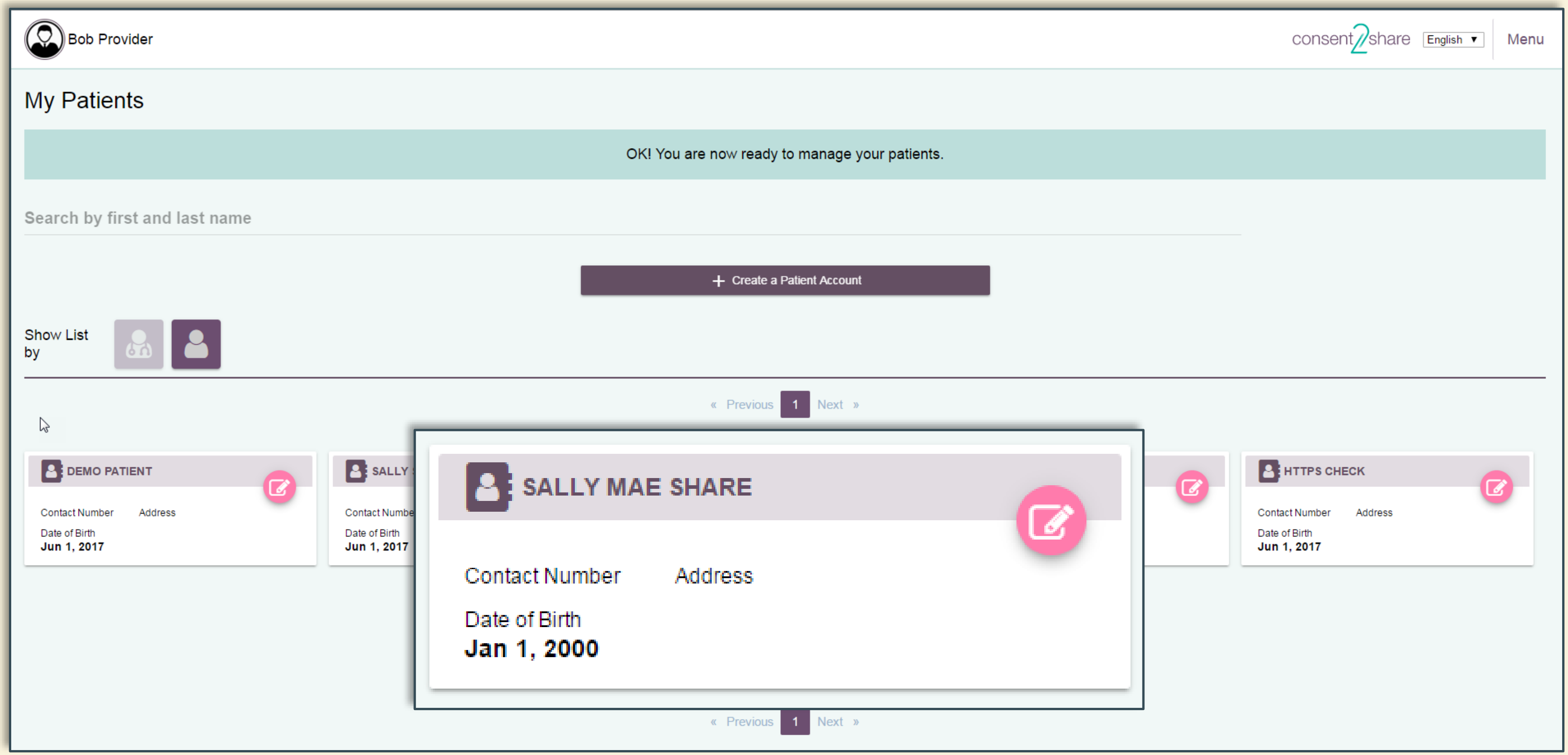


Section 6: Segment Patient Data

- There may be situations in which you receive a request from another provider for you to share your patient's sensitive health data
- Consent2Share allows you to segment health data on behalf of your patient
- To do so, your patient must first sign a consent for you to share his or her health data with another provider
- The next few pages will illustrate how to segment health data on behalf of your patients

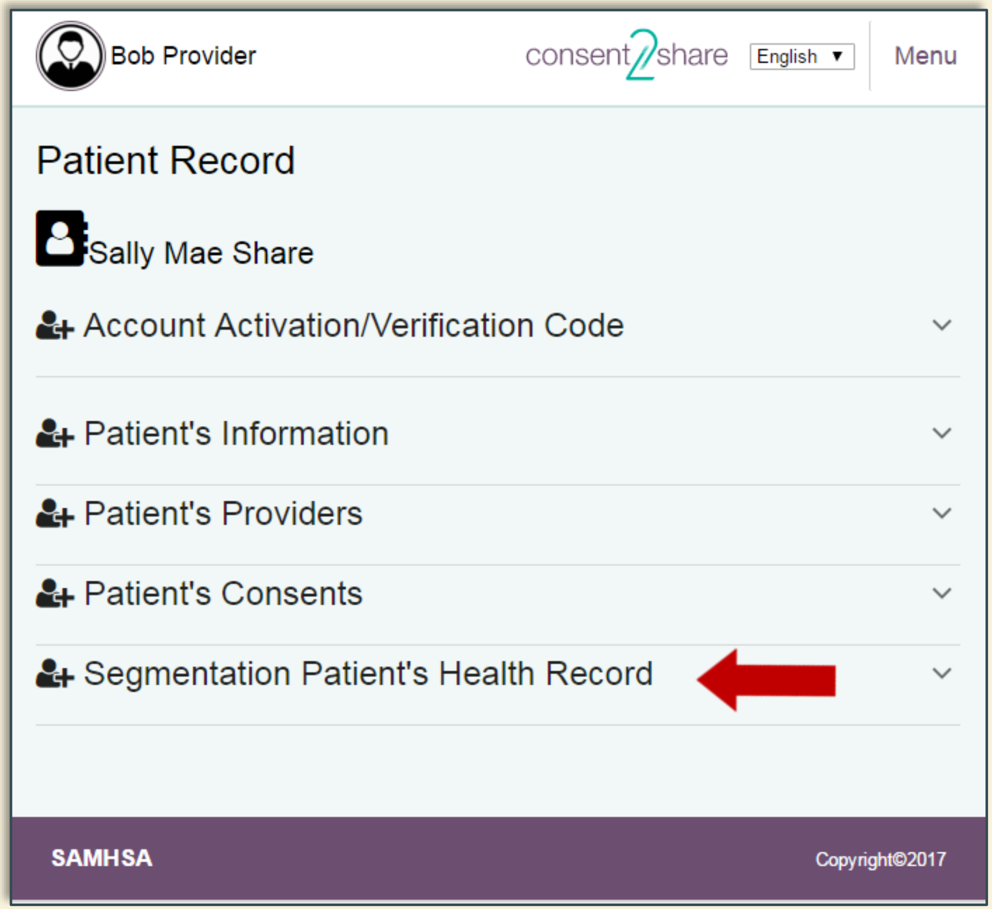
Select Your Patient

Now, select your My Patients Page and select the patient



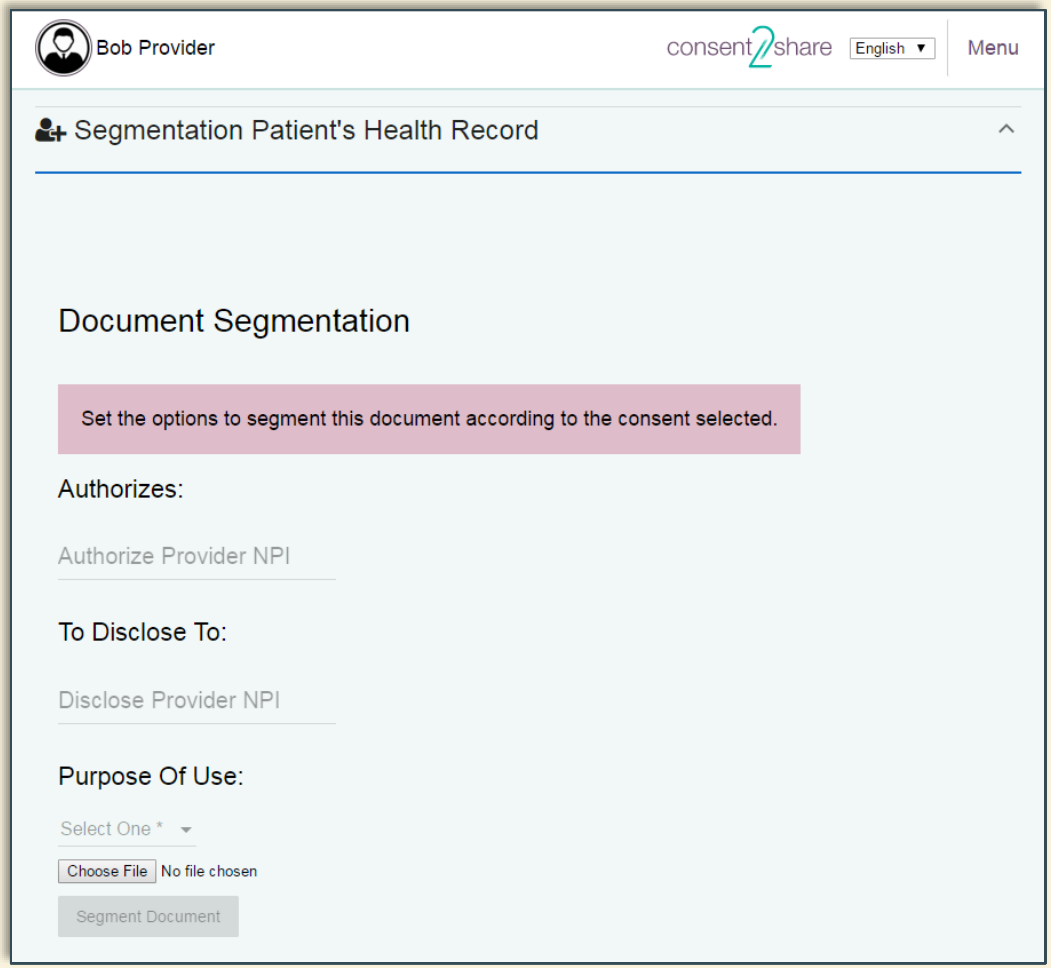
Select Document Segmentation

Select the Segmentation Patient's Health Record Link



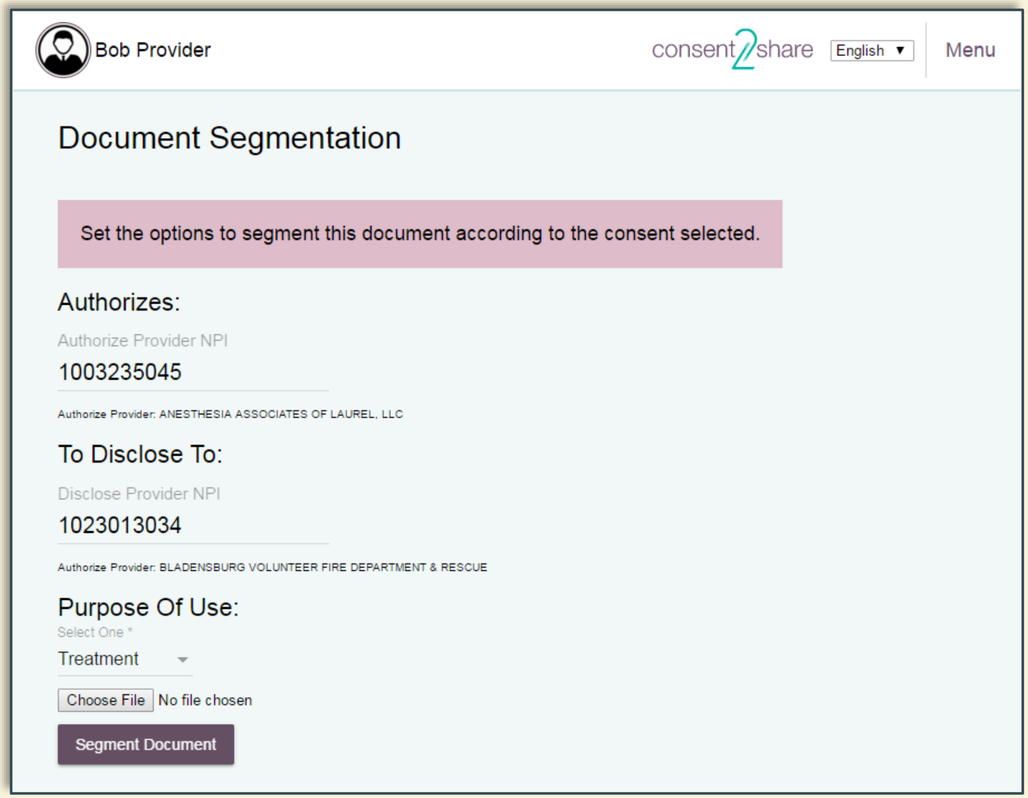
Select Segmentation

Select the Segment Patient's Health Record Page



Enter Provider NPIs

- Enter the NPI number for the Authorized Provider (the “From” provider)
- Enter the NPI number for the Disclose Provider (the “To” provider)
- Note that it will populate the providers’ names or practices



Entering Provider NPI Numbers

- Confirm the NPI populates the correct provider
- If the entered NPI number is not found or if the wrong NPI is used, the segmentation will be unsuccessful or involve an incorrect provider

Authorizes:

Authorize Provider NPI

1003235045

Authorize Provider: ANESTHESIA ASSOCIATES OF LAUREL, LLC

To Disclose To:

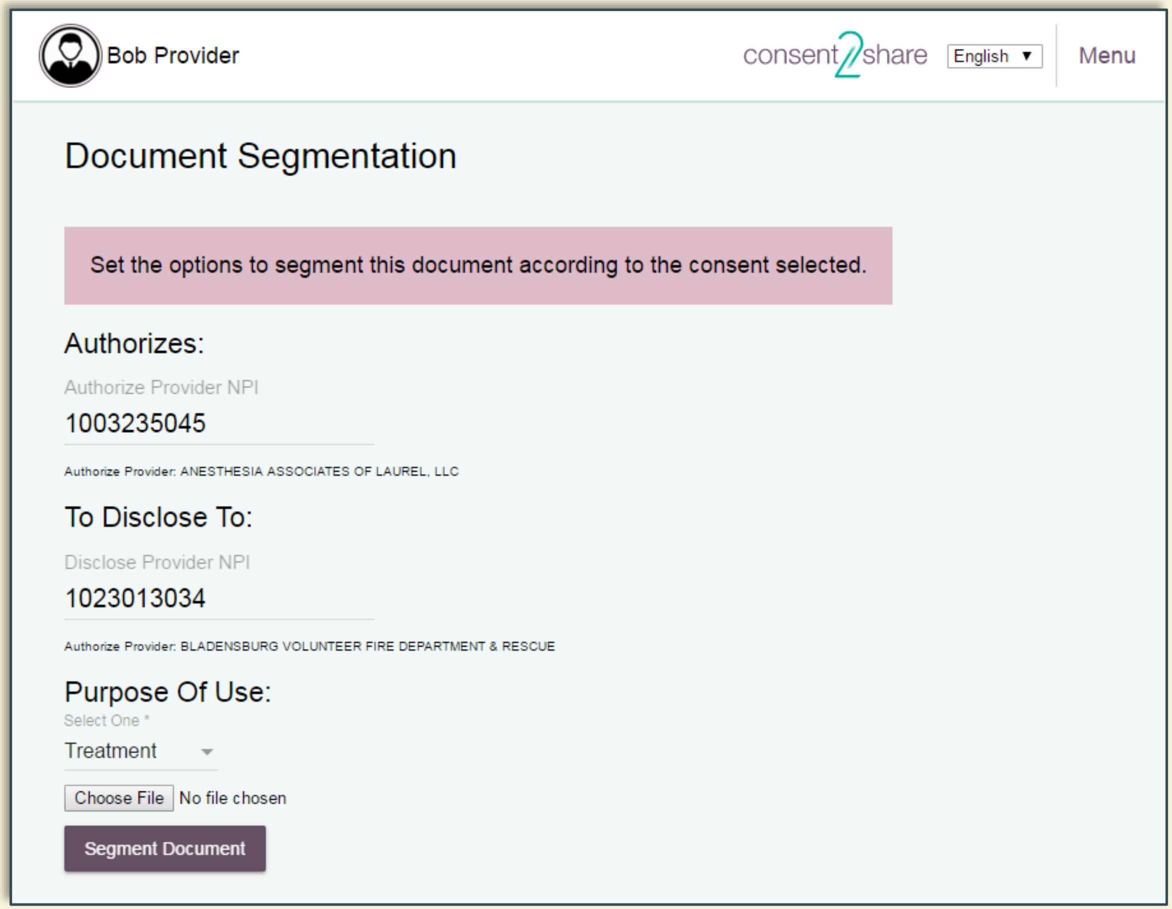
Disclose Provider NPI

1023013034

Authorize Provider: BLADENSBURG VOLUNTEER FIRE DEPARTMENT & RESCUE

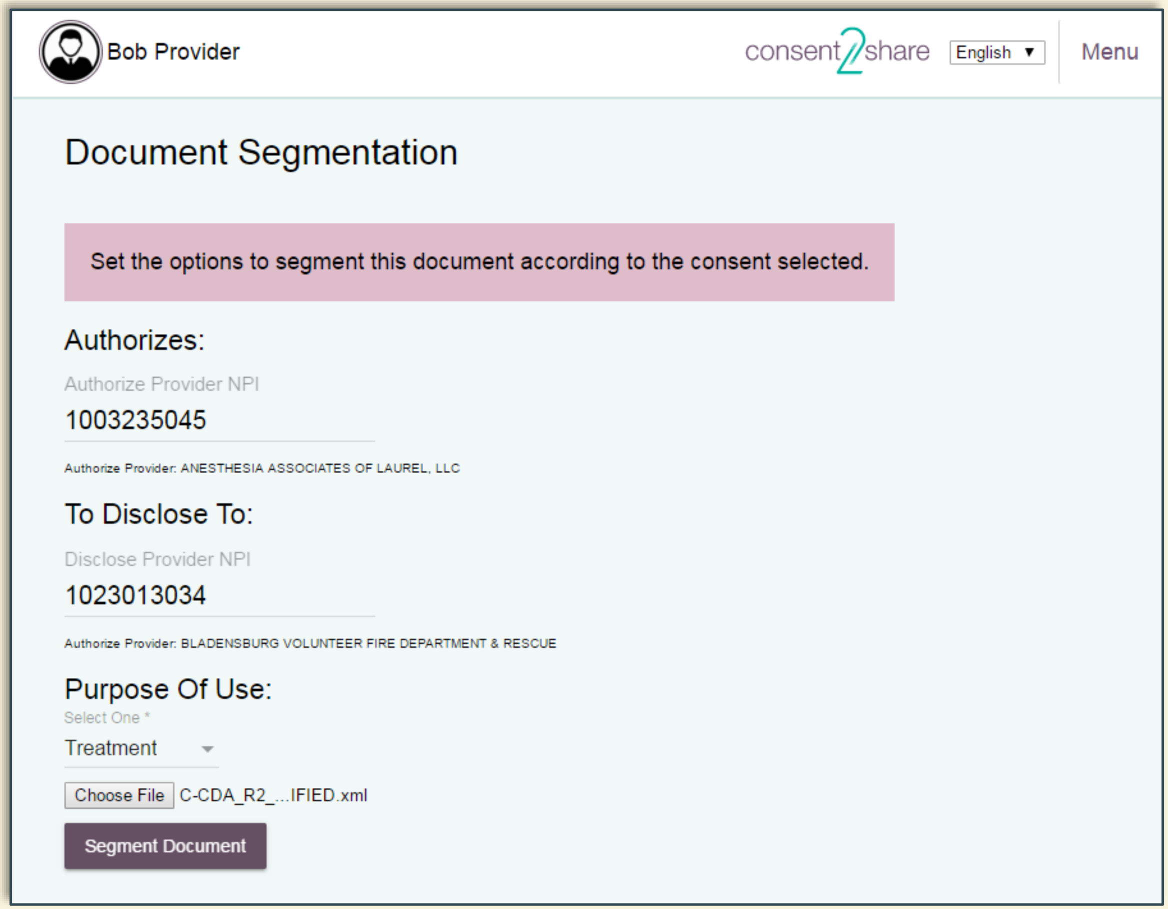
Select Purpose of Use

- Select the Purpose of use:
  - ✓ Treatment
  - ✓ Healthcare Payment
  - ✓ Healthcare Research



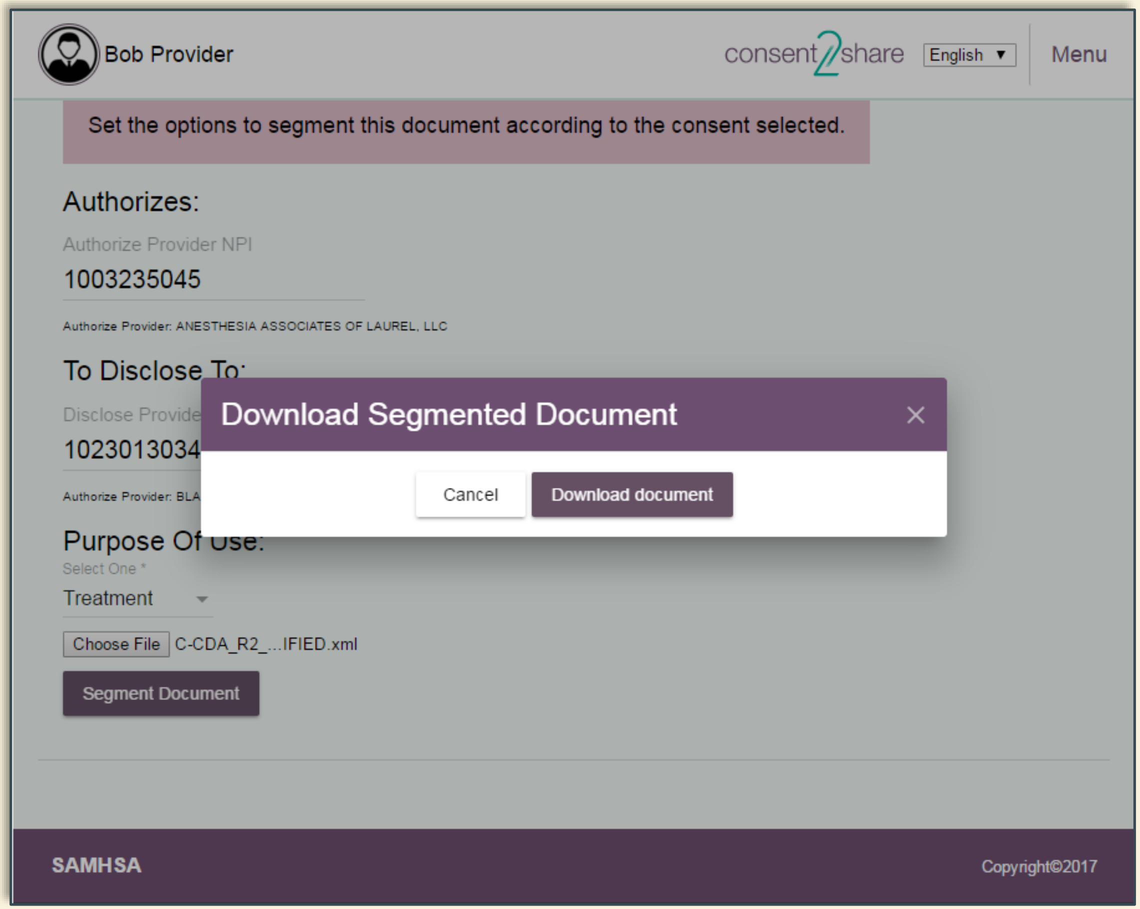
Attach Document to be Segmented

- Attach the patient's health data on file pulled from your EHR to segment
- We will attach a C-CDA document in XML format
- Click the Segment Document Button



Download Segmented Document

- After you click the Segment Document Button, segmentation will begin.
- When done, a Download Segmented Document message will appear



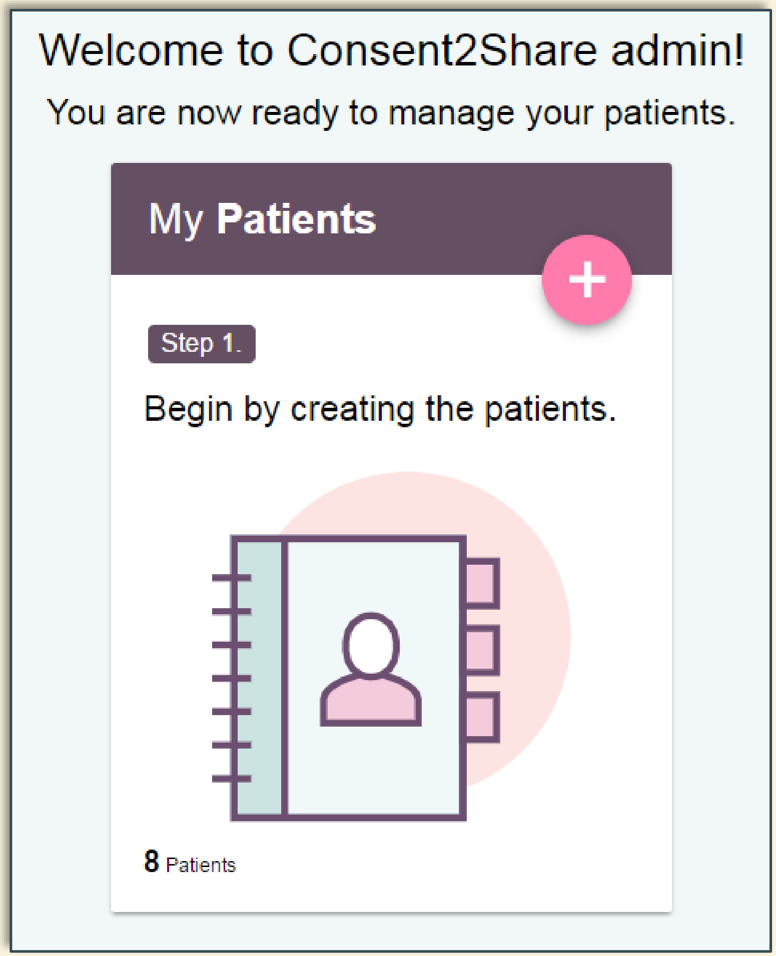
Results: Segmented Document

- You can then save the segmented document on your computer or other appropriate location
- This example is a segmented C-CDA in XML format
- Now you can send the segmented information to the requestor via a secure method

Summary of Patient Chart 4567 Residence Rd Beaverton 97867 OR US Sample Document 4567 Residence Rd Beaverton OR 97867 US Boris Bo Jones 4444 Home Street Beaverton OR 97867 US The Doctors Together Physician Group 1007 Health Drive Portland OR 99123 US 1004 Healthcare Drive Portland OR 99123 US Patricia Patty Primary M.D. 1004 Healthcare Drive Portland OR 99123 US Generic EHR Clinical System 2.0.0.0.0.0 Generic EHR C-CDA Factory 2.0.0.0.0.0 - C-CDA Transform 2.0.0.0.0 The Doctors Together Physician Group 1004 Healthcare Drive Portland OR 99123 US 1007 Healthcare Drive Portland OR 99123 US Ellen Enter Good Health HIE 1009 Healthcare Drive Portland OR 99123 US 1004 Healthcare Drive Portland OR 99123 US Patricia Patty Primary M.D. Primary Care Provider 1004 Healthcare Drive Portland OR 99123 US Patricia Patty Primary M.D. The DoctorsTogether Physician Group 1004 Health Drive Portland OR 99123 US ***PLEASE READ PROHIBITION ON RE-DISCLOSURE*** "This information has been disclosed to you from records protected by Federal confidentiality rules (42 CFR part 2). The Federal rules prohibit you from making any further disclosure of this information unless further disclosure is expressly permitted by the written consent of the person to whom it pertains or as otherwise permitted by 42 CFR part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose. The Federal rules restrict any use of the information to criminally investigate or prosecute any alcohol or drug abuse patient."(42 C.F.R. § 2.32) ALLERGIES AND ADVERSE REACTIONS No known allergies Henry Seven MEDICATIONS RxNorm Code Product Generic Name Brand Name Dose Form Route Frequency Patient Instructions Status Date Started 281 Medication Acyclovir 200 mg q.d. Active August 20, 2014 Acyclovir This is the text of the Patient Instruction. Note that this instruction is printed in the narrative text of the parent Section and is refereced by the following pointer to it. Very Restricted Confidentiality Encrypt information NORDSCLCD PROBLEMS Problem Name Problem Code Effective Dates Problem Status Alcohol Dependence 303.90 From: August 20, 2015 To: Active HIV infection (symptomatic) 042 From: August 20, 2015 To: Active Very Restricted Confidentiality Encrypt information NORDSCLCD PROCEDURES Description Date and Time (Range) Status Laparoscopic appendectomy 03 Feb 2014 09:22am- 03 Feb 2014 11:15am Completed Electrocardiogram (12-Lead) 29 Mar 2014 09:15am Completed Individual Counseling For Medical Nutrition 29 Mar 2014 10:45am Completed Laparoscopic appendectomy 1001 Village Avenue Portland OR 99123 US Community Health and Hospitals 1001 Village Avenue Portland OR 99123 US Electrocardiogram (12-Lead) 1001 Village Avenue Portland OR 99123 US Community Health and Hospitals 1001 Village Avenue Portland OR 99123 US Individual Counseling For Medical Nutrition 1001 Village Avenue Portland OR 99123 US Community Health and Hospitals 1001 Village Avenue Portland OR 99123 US RESULTS Name Actual Result Date CBC with Ordered Manual Differential panel - Blood 8/6/2012 Leukocytes in Blood by Manual count [LOINC: 804-5] Pending 8/6/2012 11:45am SOCIAL HISTORY Social History Observation Description Dates Observed Current Smoking Status Unknown if ever smoked September 10, 2012 11:45am Vital Signs (Last Filed) Date Blood Pressure Pulse Temperature Respiratory Rate Height Weight BMI SpO2 05/20/2014 7:36pm 120/80mm[Hg] 80 /min 37.2 C 18 /min 170.2 cm 108.8 kg 37.58 kg/m2 98%

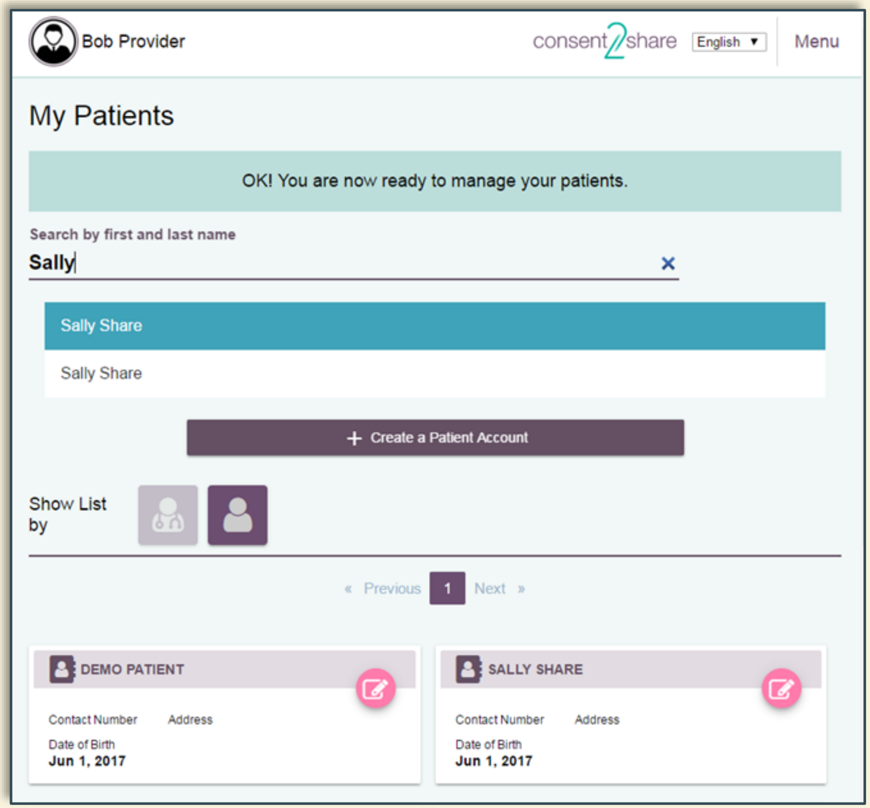
Section 7: Search for Patients

- Consent2Share includes a patient search feature
- First, log into the Provider Portal using your provider credentials
- Next, select the My Patients card
- That will open the Provider page



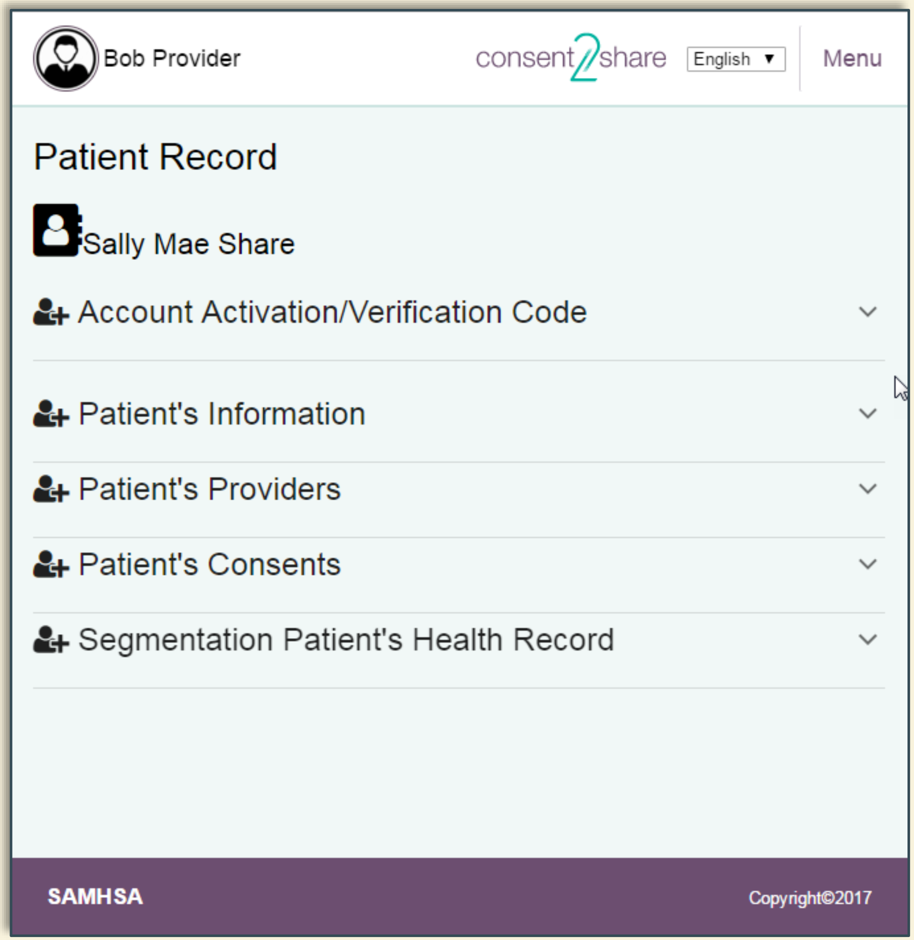
Begin Typing Patient's Name

- Begin typing the patient's name in the search input field
- The dropdown box will populate the names that match your input
- Roll your cursor over the names and they will highlighted
- Click the highlighted name whom you are searching



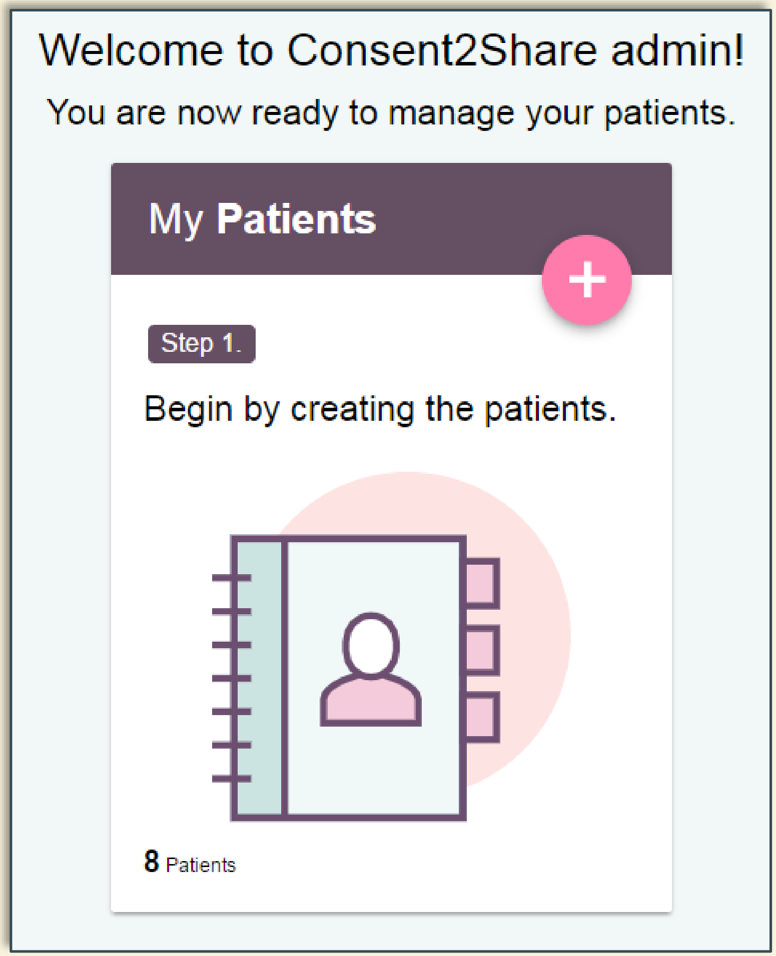
Select Highlighted Name

- After you click the highlighted name, the system will open that patient's Patient Record
- Now you can carry out any of the tasks described above



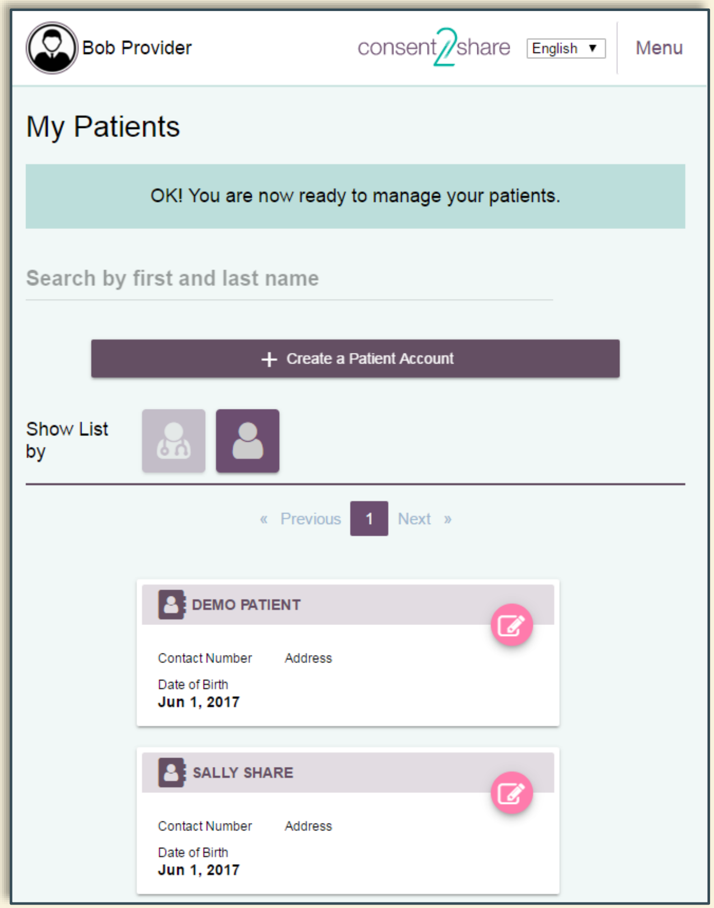
Section 8: Update Patient Information

- Consent2Share allows providers to update their patient's information
- First, log into the Provider Portal using your provider credentials
- Next, click the My Patients card
- That will open the Provider page



Select Appropriate Patient

- At the Provider Page, select the appropriate Patient Card
- That will bring you to the relevant Patient Record Page



Section 9: Update Patient Information

- Once the Patient Record page opens, you can:
  - ✓ *Enter information* that was not previously entered
  - ✓ *Modify information* that changed since the account was created
- Click the save button after you modify any information