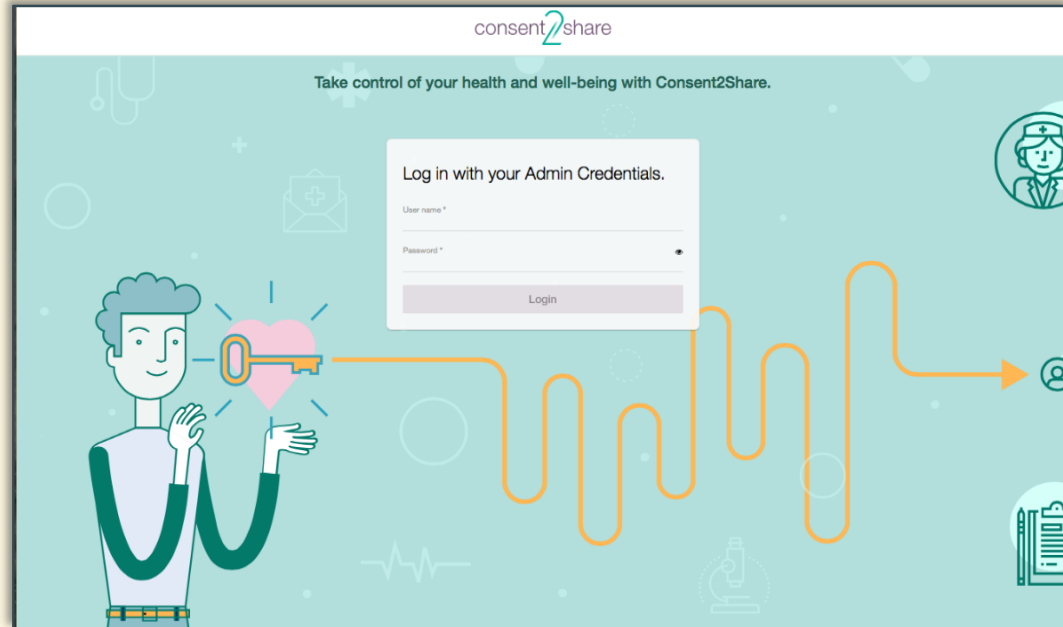



## Consent2Share V3.2.0 Provider User Guide



# 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

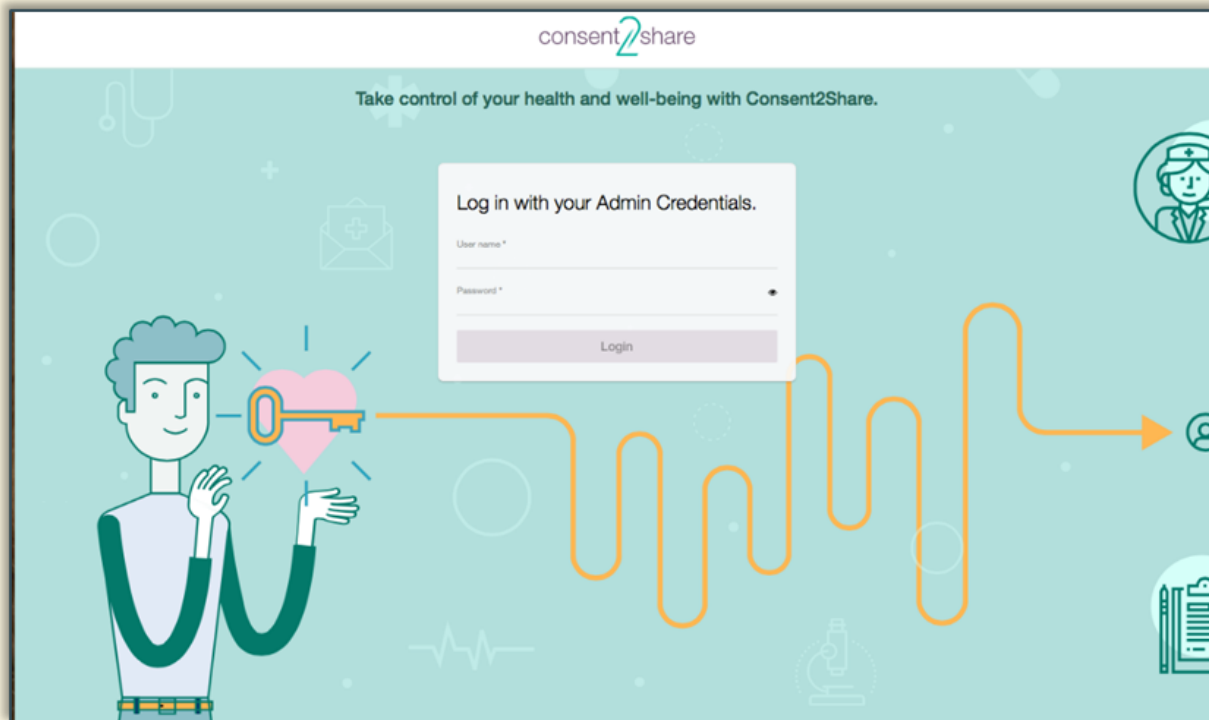


This Provider User Guide will show you how to:

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

Bob Provider consent<sup>2</sup>share English Menu

Welcome to Consent2Share admin!  
You are now ready to manage your patients.

### My Patients

Step 1

Begin by creating the patients.

4 Patients

SAMHSA Copyright©2017



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

Bob Provider consent<sup>2</sup>share English Menu

### My Patients

OK! You are now ready to manage your patients.

Search by first and last name

+ Create a Patient Account

Show List by

« Previous 1 Next »

<b>DEMO PATIENT</b>			
Contact Number	Address		
Date of Birth			
Jun 1, 2017			

<b>SALLY SHARE</b>			
Contact Number	Address		
Date of Birth			
Jun 1, 2017			

<b>TEST PATIENT</b>			
Contact Number	Address		
Date of Birth			
Aug 5, 1980			

# Click the Create a Patient Button

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

Bob Provider

consent2share English Menu

## My Patients

OK! You are now ready to manage your patients.

Search by first and last name

+ Create a Patient Account

Show List by

« Previous 1 Next »

	<b>DEMO PATIENT</b>	
Contact Number	Address	
Date of Birth		
<b>Jun 1, 2017</b>		

	<b>SALLY SHARE</b>	
Contact Number	Address	
Date of Birth		
<b>Jun 1, 2017</b>		

	<b>TEST PATIENT</b>	
Contact Number	Address	
Date of Birth		
<b>Aug 5, 1980</b>		

# Patient Demographics Page

The Patients Demographics Page will open

The screenshot shows a web form titled "Patient Demographics Page" with a header "Patient Information" and a close button. A teal banner at the top reads "Please complete all required fields to create a Patient Account." The form is organized into two main sections: "Required Information" and "Additional Information".

**Required Information**

Role	Preferred Language
Patient	English
First Name	Middle Name (Optional)
Last Name	Email
Registration Purpose Email(Optional)	
Gender	Date of Birth
Identifier System	Identifier Value

**Additional Information**

Street Line1	Street Line2 (Optional)
City	Postal Code
State	Country
Social Security Number	Phone

At the bottom right, there are "Cancel" and "Save" buttons.



# 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

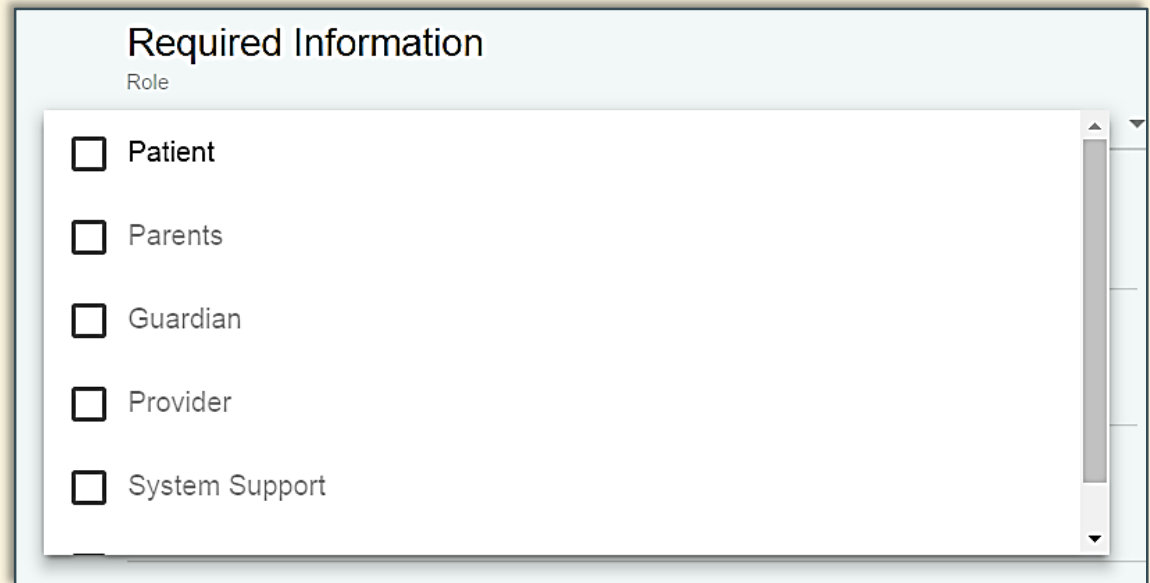
The screenshot shows the 'Patient Demographics' page in the 'consent2share' system. The user is logged in as 'Bob Provider'. The page title is 'Required Information'. The form contains the following fields:

- Role: Patient
- Preferred Language: English (dropdown menu)
- First Name: [text input]
- Middle Name (Optional): [text input]
- Last Name: [text input]
- Email: [text input]
- Registration Purpose Email(Optional): [text input]
- Gender: [dropdown menu]
- Date of Birth: [calendar icon] [text input]
- Identifier System: [dropdown menu]
- Identifier Value: [text input]

# 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



Required Information

Role

- Patient
- Parents
- Guardian
- Provider
- System Support

# Enter Optional Patient Information

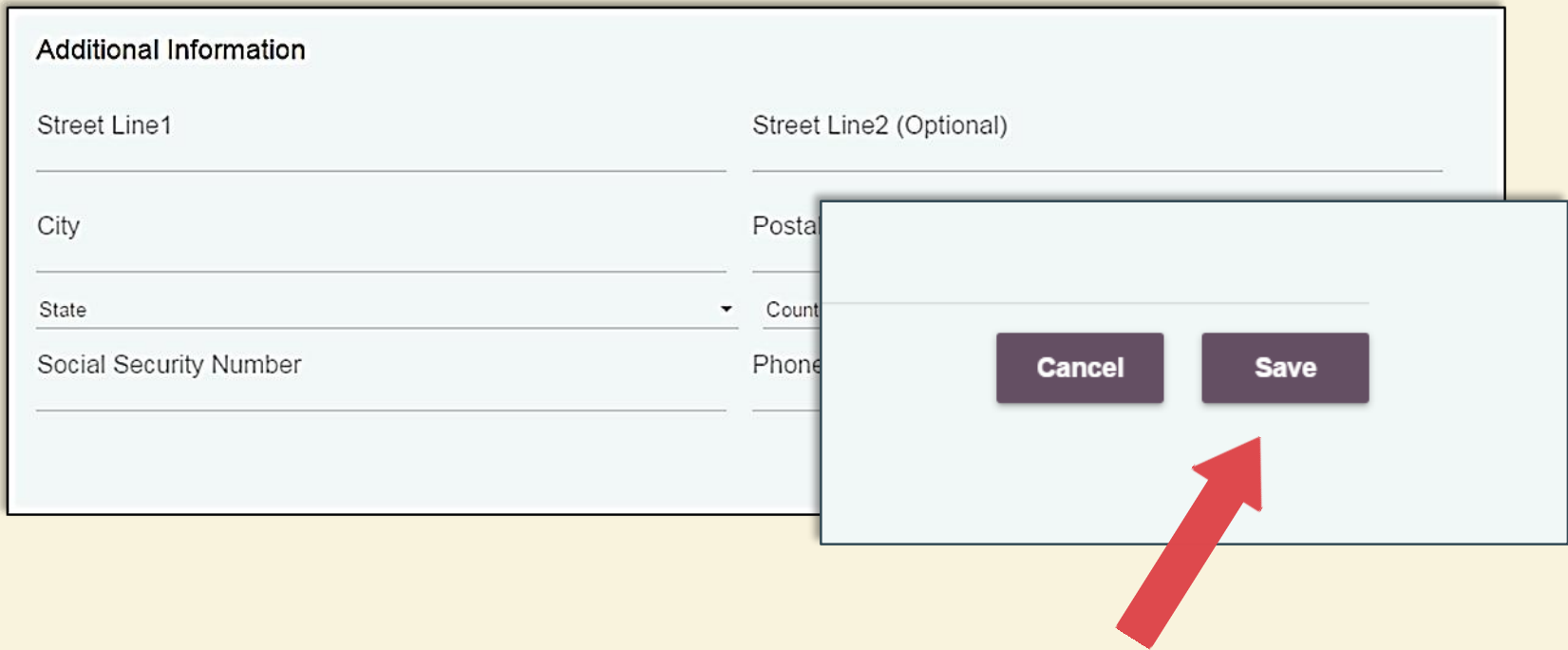
- You can also enter optional *Additional Information*
  - ✓ Address, Social Security number, and phone number
- You can enter the information now
- Or, you can update patient information later

**Additional Information**

Street Line1	Street Line2 (Optional)
City	Postal Code
State	Country
Social Security Number	Phone

# Click Save When Finished

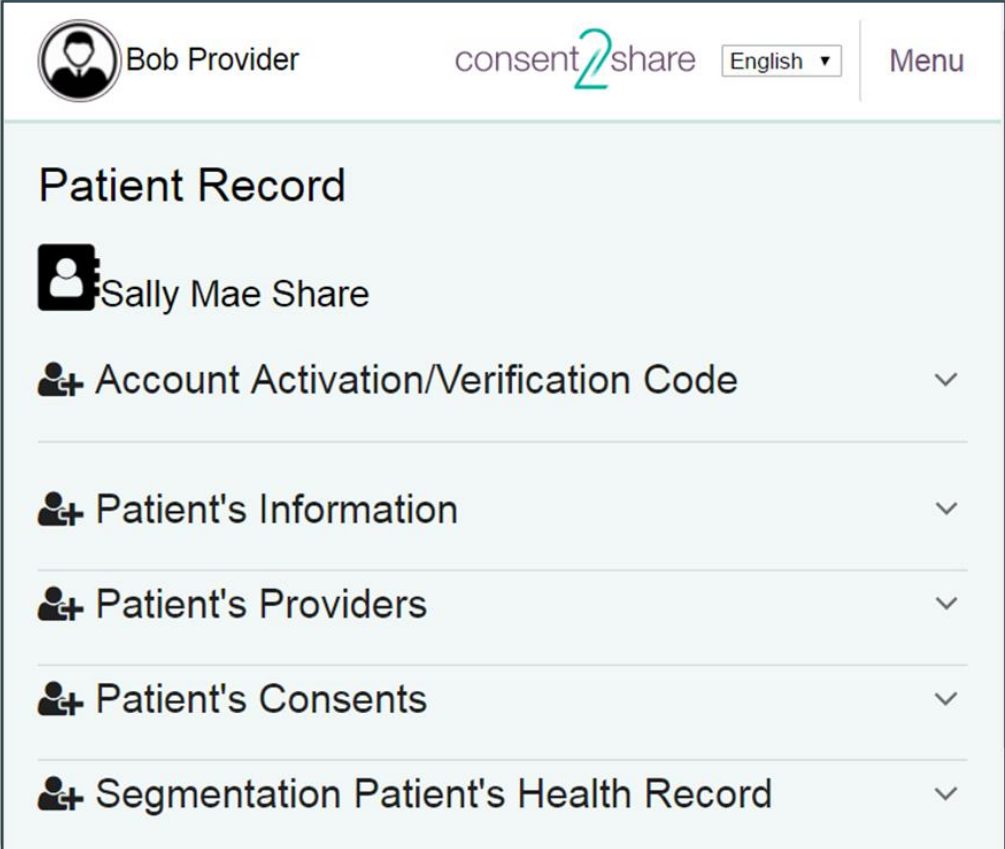
When finished entering patient information, click the Save button



The image shows a screenshot of a patient information form. The form is titled "Additional Information" and contains several input fields: "Street Line1", "Street Line2 (Optional)", "City", "Postal", "State", "County", "Social Security Number", and "Phone". A red arrow points to the "Save" button, which is located next to a "Cancel" button. The "Save" button is highlighted with a red arrow, indicating that it should be clicked when finished entering patient information.

# 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



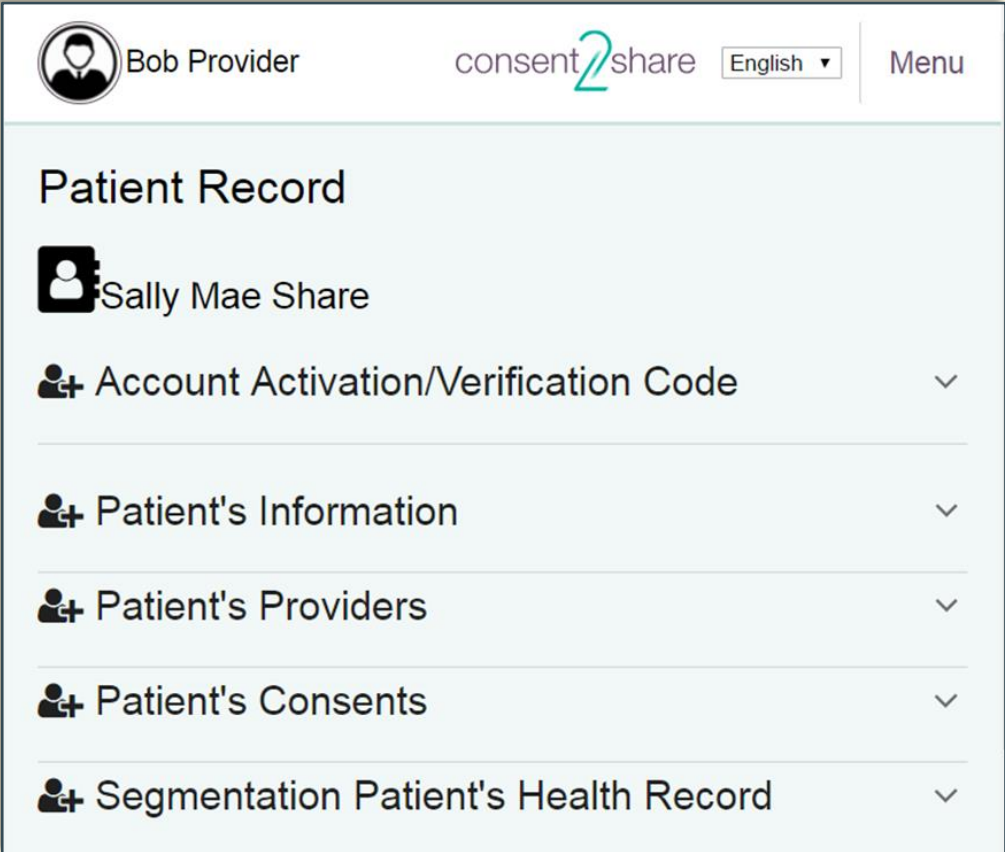
The screenshot shows a web interface for a patient record. At the top, there is a header bar with a user profile icon and the name "Bob Provider" on the left, the "consent2share" logo in the center, and a language dropdown menu set to "English" and a "Menu" button on the right. Below the header, the main content area is titled "Patient Record" and features a patient profile icon and the name "Sally Mae Share". Underneath the profile, there is a list of menu items, each with a person icon and a plus sign, and a dropdown arrow on the right:

- Account Activation/Verification Code
- Patient's Information
- Patient's Providers
- Patient's Consents
- Segmentation Patient's Health Record

# 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

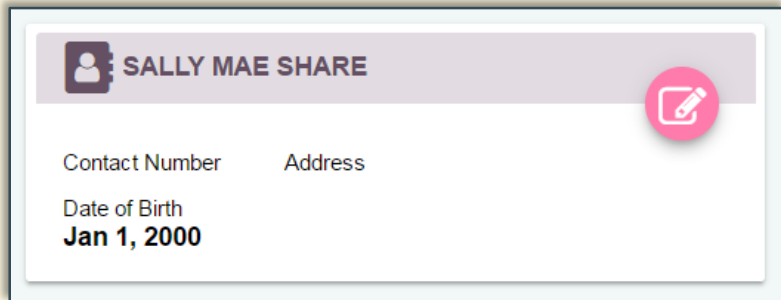


The screenshot shows the Patient Record Page interface. At the top, there is a header bar with a user profile icon and the name "Bob Provider" on the left, the "consent2share" logo in the center, and a language dropdown menu set to "English" and a "Menu" button on the right. Below the header, the main content area is titled "Patient Record" and features a list of patient-related actions, each with a person icon and a dropdown arrow:

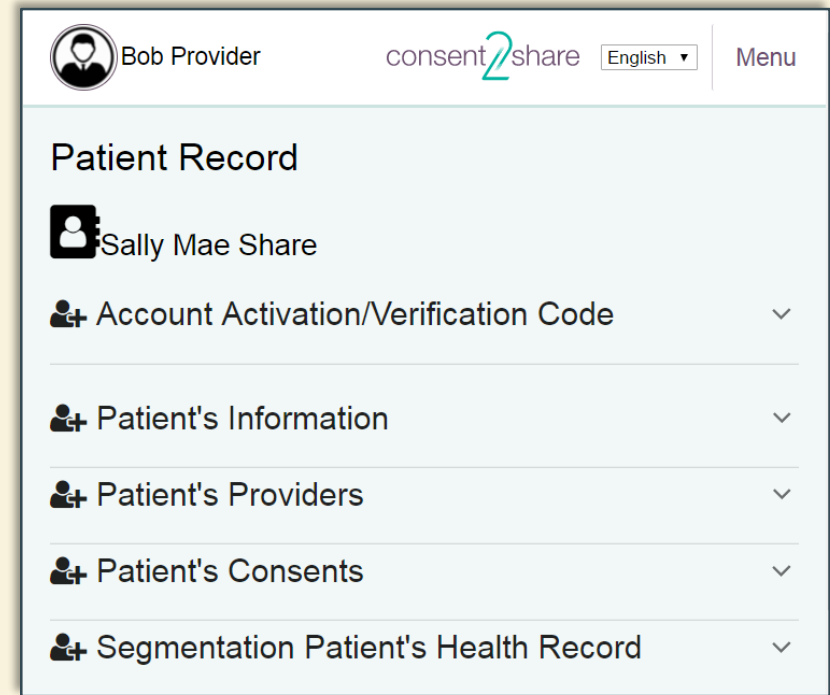
- Account Activation/Verification Code
- Patient's Information
- Patient's Providers
- Patient's Consents
- Segmentation Patient's Health Record

# 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 screenshot shows the user interface for a patient record. At the top, it displays the user's name 'Bob Provider', the system logo 'consent2share', a language dropdown menu set to 'English', and a 'Menu' button. Below this is the 'Patient Record' section, which includes a patient icon and the name 'Sally Mae Share'. A list of menu items follows, each with a person icon and a plus sign, and a dropdown arrow on the right:

- Account Activation/Verification Code
- Patient's Information
- Patient's Providers
- Patient's Consents
- Segmentation Patient's Health Record



# The Account Activation Page

The screenshot shows the user interface for account activation. At the top, the user is identified as 'Bob Provider' with a profile icon. The system logo 'consent2share' and a language dropdown set to 'English' are visible, along with a 'Menu' button. The main navigation area includes 'Patient Record', 'Sally Mae Share' (with a person icon), and 'Account Activation/Verification Code' (with a person and plus icon and an upward arrow). Below this is a section titled 'ACCOUNT ACTIVATION / VERIFICATION CODE'. It contains a form with two fields: 'Activate Account for:' with the value 'Sally Mae Share' and 'Verification Code:' with the value '---'. A bold instruction reads: 'Select the 'Send Email' button to generate the Verification Code. Sending an account activation email to the address listed above will generate a unique Verification Code.' At the bottom left, the 'Account Status:' is shown as 'Account Not Yet Activated' with a key icon. A purple 'Send Email' button is located at the bottom right.

This is the Account Activation/Verification Code Page

# Send Account Verification Email

The screenshot shows the user interface for a provider named Bob Provider. The header includes the user's name, the consent2share logo, a language dropdown set to English, and a Menu button. Below the header, there is a 'Patient Record' section for Sally Mae Share. A menu item 'Account Activation/Verification Code' is expanded to show options. A section titled 'ACCOUNT ACTIVATION / VERIFICATION CODE' contains the following text: 'Activate Account for: Sally Mae Share' and 'Verification Code: ---'. Below this, instructions state: 'Select the 'Send Email' button to generate the Verification Code. Sending an account activation email to the address listed above will generate a unique Verification Code.' At the bottom left, the 'Account Status' is shown as 'Account Not Yet Activated'. A 'Send Email' button is located at the bottom right. Two red arrows point to the 'Send Email' button and the 'Account Not Yet Activated' status.

- 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

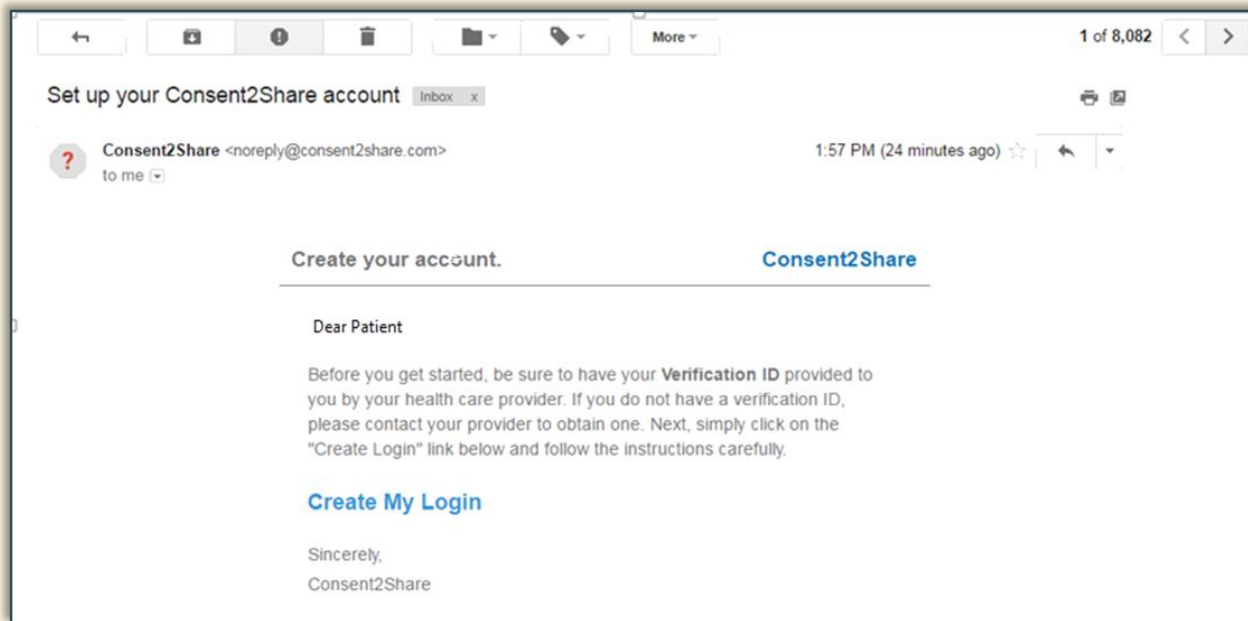
# Notification of Sent Validation Code

The screenshot displays a user interface for account activation. At the top, a notification banner reads "Successfully sent the email." with a red arrow pointing to it. Below this, the user's name "Sally Mae Share" is visible. The main section is titled "ACCOUNT ACTIVATION / VERIFICATION CODE". It shows "Activate Account for: Sally Mae Share" and "Verification Code: r7hke8m", with a red arrow pointing to the code. A message states: "An email has been sent and awaiting the patient to activate the account. Select the 'Send Email' button to re-send an account activation email." At the bottom, the "Account Status" is "Activation Email Sent" with a red arrow pointing to it, and a "Send Email" button is present. The page also includes sections for "Patient's Information" and "Patient's Providers".

- 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

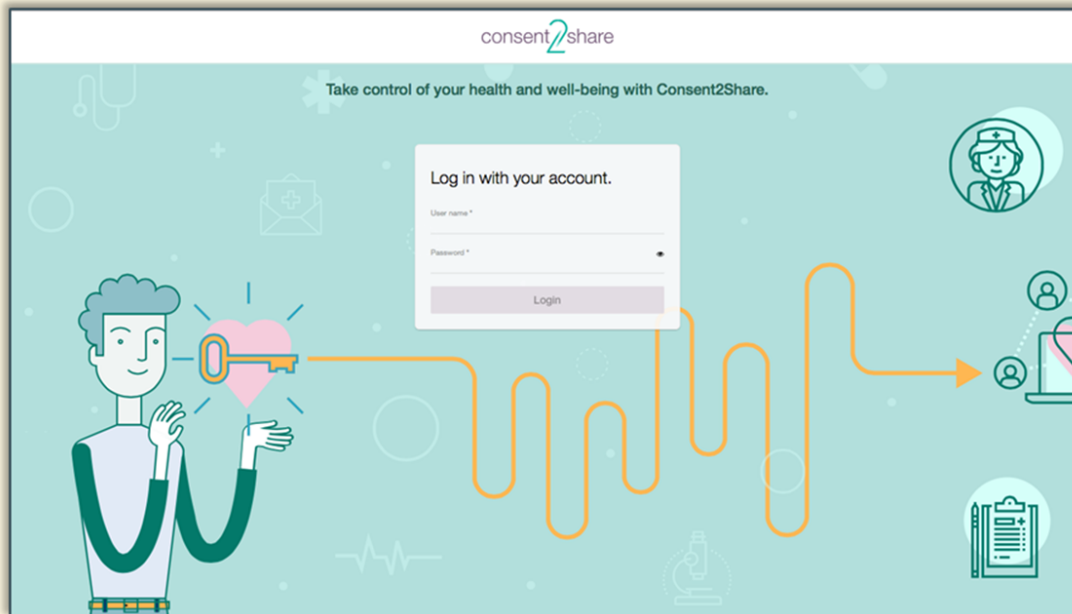
# *Patient Activates the Account*

- 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

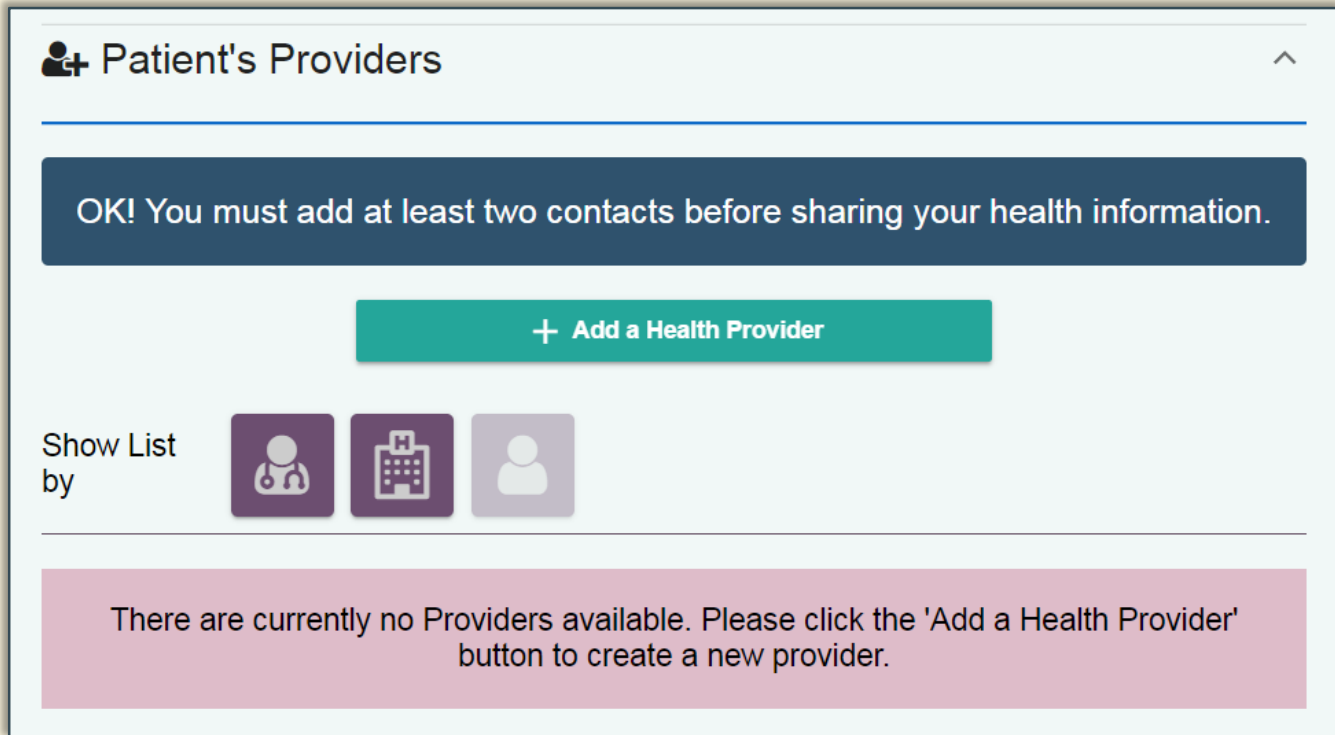


The screenshot shows the user interface of the 'consent2share' application. At the top, there is a header bar with a user profile icon and the name 'Bob Provider' on the left, the 'consent2share' logo in the center, and a language dropdown menu set to 'English' and a 'Menu' button on the right. Below the header, the main content area is titled 'Patient Record'. Under this title, there is a patient profile icon and the name 'Sally Mae Share'. Below the patient name, there is a list of menu items, each with a person-plus icon and a dropdown arrow:

- Account Activation/Verification Code
- Patient's Information
- Patient's Providers
- Patient's Consents
- Segmentation Patient's Health Record

# 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



The screenshot shows the 'Patient's Providers' page. At the top, there is a header with a person icon and a plus sign, followed by the text 'Patient's Providers' and an upward arrow. Below the header is a dark blue banner with the text 'OK! You must add at least two contacts before sharing your health information.' Underneath the banner is a green button with a white plus sign and the text '+ Add a Health Provider'. Below the button is a section titled 'Show List by' with three icons: a stethoscope, a hospital building, and a person silhouette. At the bottom of the page is a pink banner with the text 'There are currently no Providers available. Please click the 'Add a Health Provider' button to create a new provider.'



# 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

The screenshot shows a search interface with a dark blue header containing a magnifying glass icon and the word "Search". Below the header, there are two main steps:

**Step 1. Please enter the provider State and City or Zip Code.**

PLEASE CHOOSE ONE.

Enter State and City OR Enter Zip Code

Please Select State (Required)  
District of Columbia

City (Required)  
Washington

**Step 2. Please enter the provider Facility Name OR Provider Name and Other Criteria.**

PLEASE CHOOSE ONE.

Enter Provider Name and Other Criteria OR Enter Facility Name

Facility Name (Required)  
Sanaga

Telephone (Optional)

At the bottom right, there are two buttons: "Clear All" and "Search". A large red arrow points to 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

The screenshot displays the 'Search Providers' interface. At the top left, the user is identified as 'Bob Provide'. The top right shows the 'consent2share' logo, a language dropdown set to 'English', and a 'Menu' button. Below the header is a search bar with the text 'Search'. The main content area is divided into two panels. The left panel, titled 'Please select to add.', shows a search result for 'SANAGA SERVICES AND CARE LLC [NPI: 1023132966]'. The result includes a green button labeled 'Select this provider.' and the address '1943 BENNETT PL NE, WASHINGTON, DC, 20002-4113' with the phone number '(202) 341-8888'. The right panel, titled 'Selections to add.', contains a table with columns for 'NPI' and 'Name/Facility'. Below the table, it states 'No Providers currently selected.' and features an 'Add to Provider List' button.

# 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

The screenshot shows the user interface for searching and adding providers. At the top left, the user is identified as 'Bob Provider'. The top right corner contains the 'consent2share' logo, a language dropdown set to 'English', and a 'Menu' button. The main heading is 'Search Providers', followed by a search bar with a magnifying glass icon and the text 'Search'. Below the search bar, there are two main panels. The left panel, titled 'Please select to add.', displays a list of search results. The first result is for 'CAPITAL AREA MEDICAL NUTRITION ASSOCIATES PLLC [NPI: 1003173865]' with a '+ Select this provider.' button. Below this, the address '1426 9TH ST NW, WASHINGTON, DC, 20001-3330' and phone number '(202) 280-7523' are shown. The second result is for 'CAPITAL HEART ASSOCIATES, P.C. [NPI: 1104039650]' with a '+ Select this provider.' button and address '5215 LOUGHBORO RD NW, SUITE 460, WASHINGTON, DC, 20016-2618' and phone number '(202) 686-9801'. The right panel, titled 'Selections to add', contains a table with columns for 'NPI' and 'Name/Facility'. One entry is visible: NPI '1023132966' and Name/Facility 'SANAGA SERVICES AND CARE LLC'. Below the table is an 'Add to Provider List' button. Navigation links '« Previous 1 2 3 Next »' are located between the two panels.

Bob Provider

consent2share English Menu

## Search Providers

Search

Please select to add.

« Previous 1 2 3 Next »

CAPITAL AREA MEDICAL NUTRITION ASSOCIATES PLLC [NPI: 1003173865]  
+ Select this provider.  
1426 9TH ST NW, WASHINGTON, DC, 20001-3330  
(202) 280-7523

CAPITAL HEART ASSOCIATES, P.C. [NPI: 1104039650]  
+ Select this provider.  
5215 LOUGHBORO RD NW, SUITE 460, WASHINGTON, DC, 20016-2618  
(202) 686-9801

Selections to add

NPI	Name/Facility
1023132966	SANAGA SERVICES AND CARE LLC

Add to Provider List

# 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

The screenshot shows a web application interface for managing a provider list. At the top left, there is a user profile for "Bob Provider". The top right corner displays "consent2share" with a language dropdown set to "English" and a "Menu" button. Below the header is a "Search Providers" section with a search bar containing the text "Search".

The main content area is divided into two panels. The left panel, titled "Please select to add.", contains a pagination control with "Previous", "1", "2", "3", and "Next" buttons. Below this, a provider card for "CAPITAL AREA MEDICAL NUTRITION ASSOCIATES PLLC [NPI: 1003173865]" is shown with a green background and a "+ Select this provider." button. Below the card, the address "1426 9TH ST NW, WASHINGTON, DC, 20001-3330" and phone number "(202) 280-7523" are listed.

The right panel, titled "Selections to add", contains a table with two columns: "NPI" and "Name/Facility". The table lists two providers:

NPI	Name/Facility
1023132966	SANAGA SERVICES AND CARE LLC
1427203710	CAPITAL BEHAVIORAL HEALTH, LLC

Below the table is a button labeled "Add to Provider List". A red arrow points to this button from the bottom of the page.

# 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

The screenshot displays a software interface with a table titled "Selections to add". The table has two columns: "NPI" and "Name/Facility". Two rows are visible, each with a red trash icon in the first column. Below the table is a button labeled "Add to Provider List". A red arrow points to this button. Overlaid on the bottom right is a dialog box titled "Add Selected Providers" with a close button (X) in the top right corner. The dialog box contains the text "Are you sure you want to add the selected providers?" and two buttons at the bottom: "Cancel" and "OK". A red arrow points to the "OK" button.

NPI	Name/Facility
1023132966	SANAGA SERVICES AND CARE LLC
1427203710	CAPITAL BEHAVIORAL HEALTH, LLC

Buttons: Add to Provider List, Add Selected Providers, Cancel, OK

# 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

The screenshot displays the 'Patient's Providers' section of a healthcare system. At the top, there is a header with a person icon and the text 'Patient's Providers'. Below the header is a dark blue banner with the message: 'OK! You must add at least two contacts before sharing your health information.' Underneath the banner is a green button labeled '+ Add a Health Provider'. Below the button, there is a 'Show List by' section with three icons: a person with a stethoscope, a hospital building, and a person silhouette. Below this is a pagination control with '« Previous', a highlighted '1', and 'Next »'. The main content area contains two provider cards. The first card is for 'SANAGA SERVICES AND CARE LLC' with NPI 1023132966, address 1943 BENNETT PL NE, WASHINGTON, 20002-4113, and contact number (202) 341-8888. The second card is for 'CAPITAL BEHAVIORAL HEALTH, LLC' with NPI 1427203710, address 1310 SOUTHERN AVE SE, WASHINGTON, 20032-4623, and contact number (202) 574-6504. Each card has a trash icon in the top right corner.

OK! You must add at least two contacts before sharing your health information.

+ Add a Health Provider

Show List by

« Previous 1 Next »

Provider Name	NPI	Address	Contact Number
SANAGA SERVICES AND CARE LLC	1023132966	1943 BENNETT PL NE, WASHINGTON, 20002-4113	(202) 341-8888
CAPITAL BEHAVIORAL HEALTH, LLC	1427203710	1310 SOUTHERN AVE SE, WASHINGTON, 20032-4623	(202) 574-6504

# 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

A screenshot of a 'Patient Record' page for 'Sally Mae Share'. The page lists several menu items, each with a person icon and a dropdown arrow: 'Account Activation/Verification Code', 'Patient's Information', 'Patient's Providers', 'Patient's Consents', and 'Segmentation Patient's Health Record'. A red arrow points to the 'Patient's Consents' link.

Patient Record

 Sally Mae Share

 Account Activation/Verification Code ▼

 Patient's Information ▼

 Patient's Providers ▼

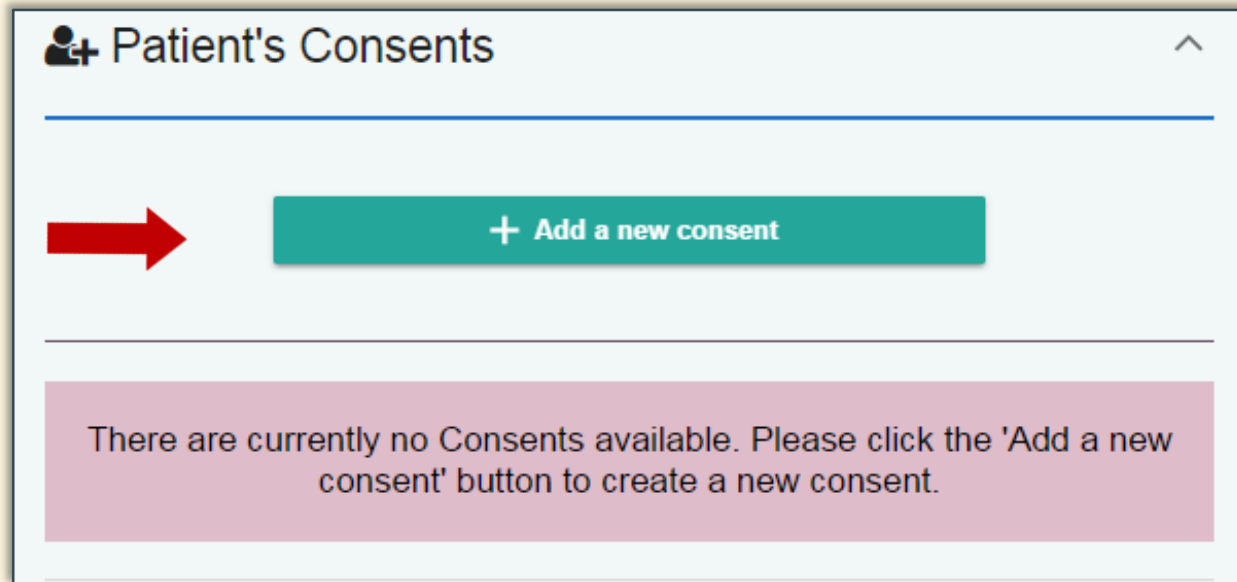
 Patient's Consents ▼

 Segmentation Patient's Health Record ▼




# 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

 Bob Provider consent2share English Menu

I, Sally Mae Share, hereby authorize...

### Select Providers

The following individual or organization To disclose my information to

### Medical Information

Select how you would like to share your medical information.

**SHARE** my medical record **WITHOUT ANY EXCEPTION** of medical information categories.

**SHARE** my medical record **WITH EXCEPTION** of specific medical information categories.

### Purpose Of Use

Choose for what purposes your medical information may be used.

**SHARE** my medical record **ONLY** for the selected purposes of use. Edit

Treatment

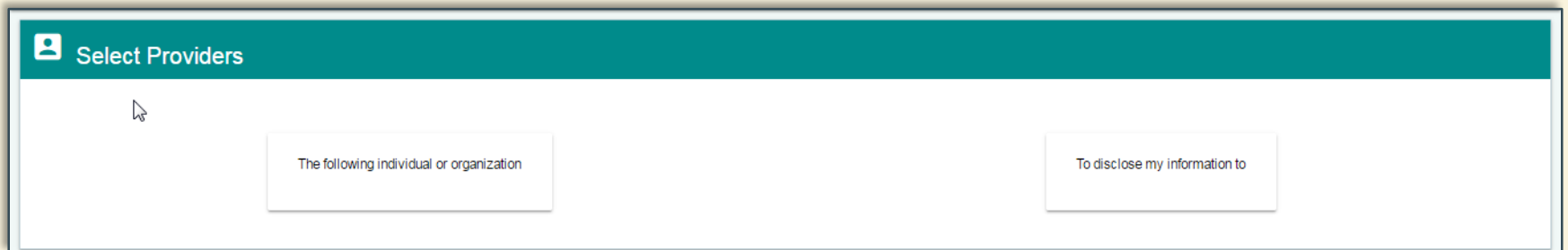
### Consent Terms

Enter a start and end date during with your medical records will be shared.

Start Date:  End Date:

# Step 1: Select Providers

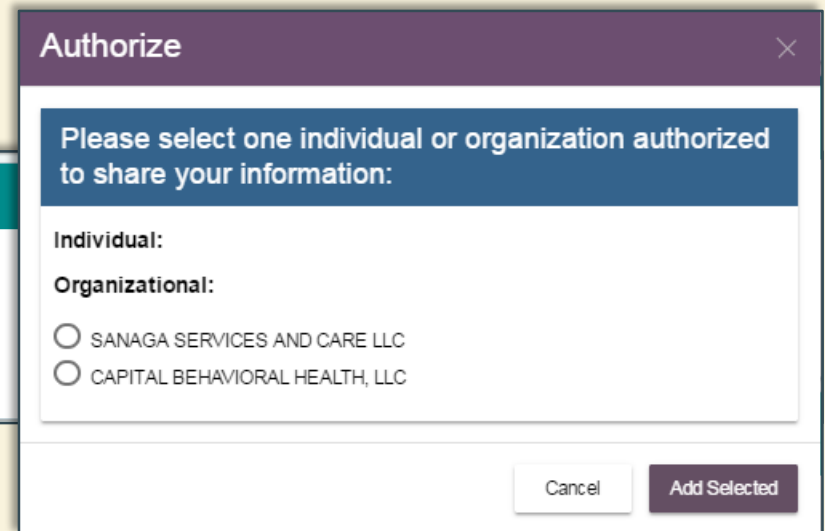
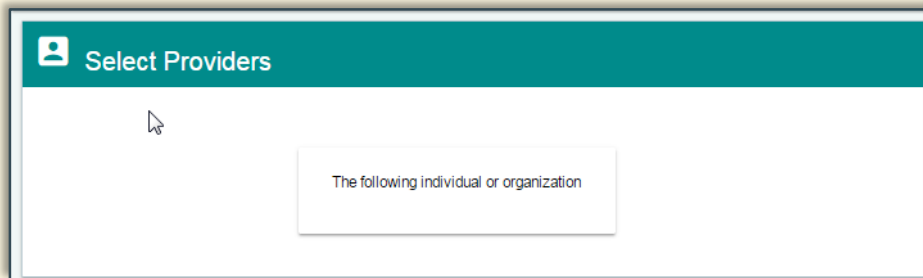
- You will need to select the “From” and “To” providers



The screenshot displays a web interface titled "Select Providers" with a teal header bar. Below the header, there is a mouse cursor icon on the left. Two white input fields are positioned horizontally. The first field contains the text "The following individual or organization" and the second field contains the text "To disclose my information to".

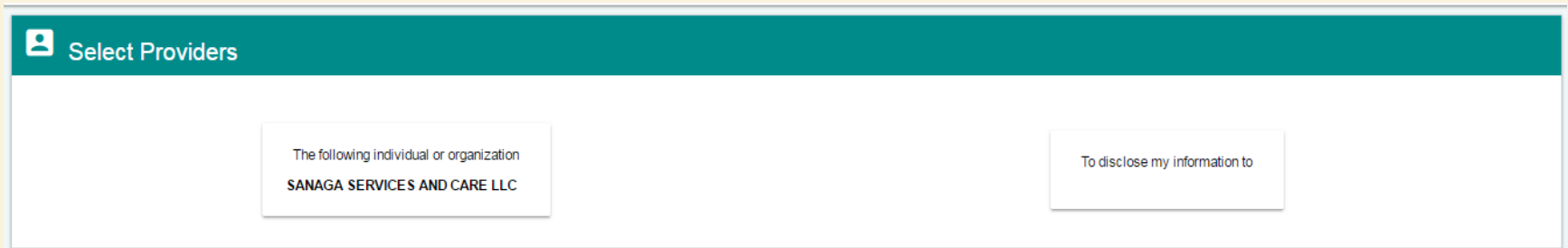
# Select the “From” Provider

- 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

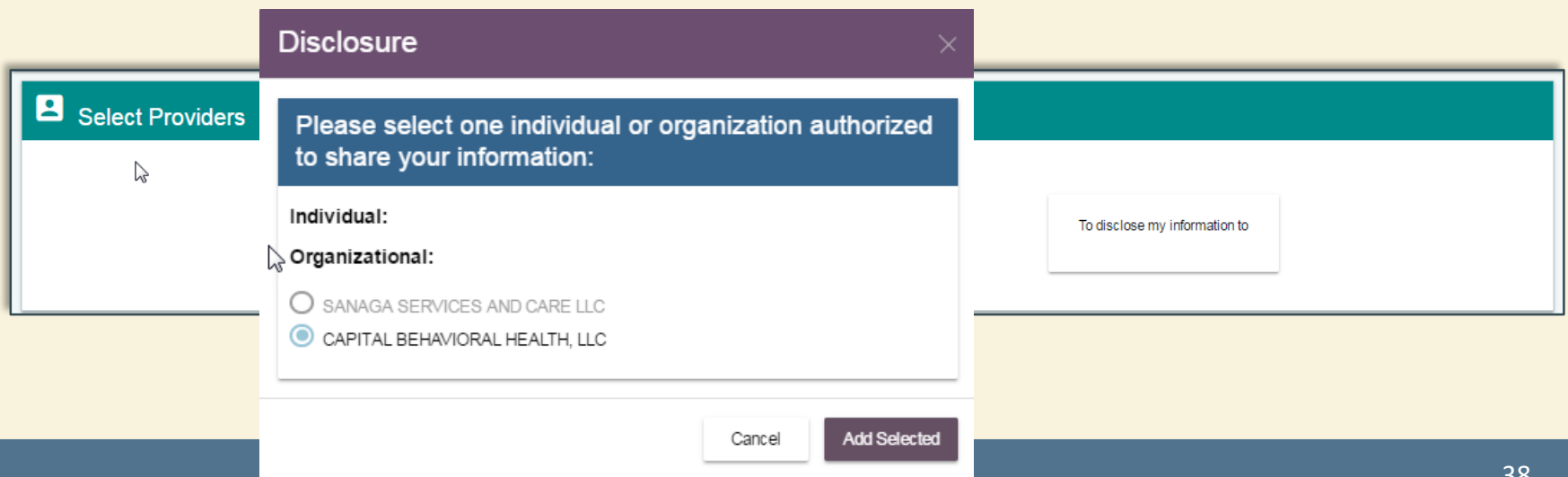


The screenshot shows a web form titled "Select Providers" with a teal header. The form contains two input fields. The left field, labeled "From", contains the text "SANAGA SERVICES AND CARE LLC". The right field, labeled "To disclose my information to", is currently empty.

Field Label	Value
From	SANAGA SERVICES AND CARE LLC
To disclose my information to	

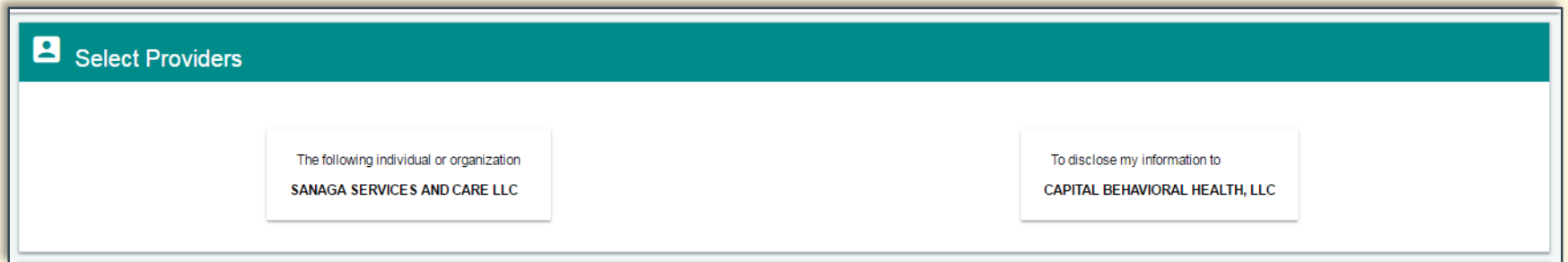
# Select “To” Provider

- 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

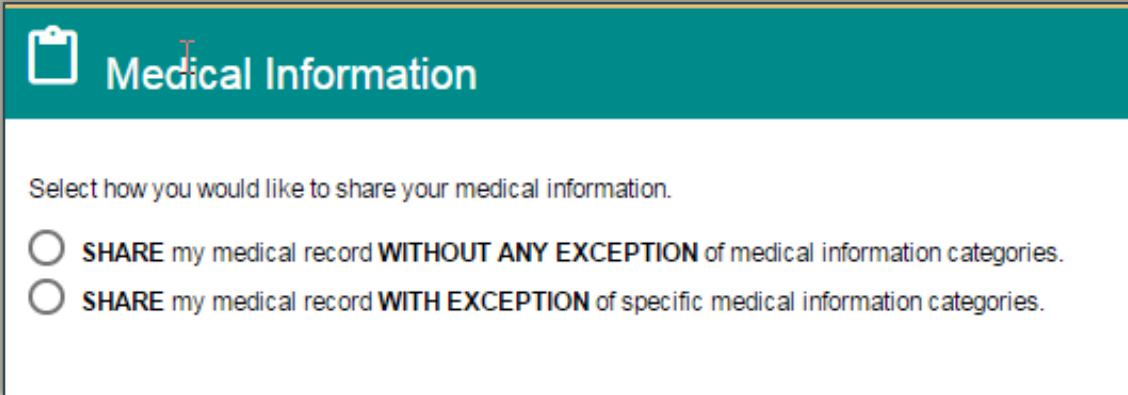
Now it populates the “To” provider box



The screenshot shows a web interface titled "Select Providers" with a teal header. Below the header, there are two white boxes with rounded corners. The left box contains the text "The following individual or organization" followed by "SANAGA SERVICES AND CARE LLC". The right box contains the text "To disclose my information to" followed by "CAPITAL BEHAVIORAL HEALTH, LLC".

# 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

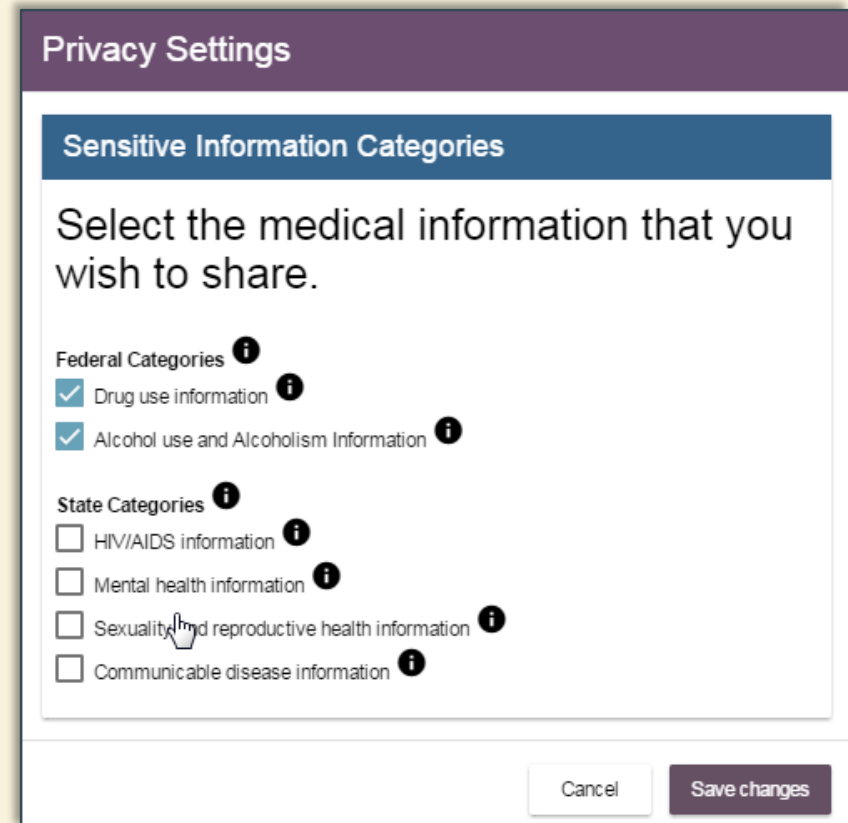


The screenshot shows a mobile application interface with a teal header bar containing a clipboard icon and the text "Medical Information". Below the header, the text "Select how you would like to share your medical information." is displayed. Two radio button options are listed: "SHARE my medical record **WITHOUT ANY EXCEPTION** of medical information categories." and "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



The screenshot shows a 'Privacy Settings' dialog box with a purple header. Below the header is a blue bar with the text 'Sensitive Information Categories'. The main content area has the instruction 'Select the medical information that you wish to share.' and is divided into two sections: 'Federal Categories' and 'State Categories'. Under 'Federal Categories', there are two checked items: 'Drug use information' and 'Alcohol use and Alcoholism Information'. Under 'State Categories', there are four unchecked items: 'HIV/AIDS information', 'Mental health information', 'Sexuality and reproductive health information', and 'Communicable disease information'. Each item has a small 'i' icon to its right. At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'Save changes'.

Privacy Settings

Sensitive Information Categories

Select the medical information that you wish to share.

Federal Categories ⓘ

- Drug use information ⓘ
- Alcohol use and Alcoholism Information ⓘ

State Categories ⓘ

- HIV/AIDS information ⓘ
- Mental health information ⓘ
- Sexuality and reproductive health information ⓘ
- Communicable disease information ⓘ

Cancel Save changes

# 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

**Medical Information**

Select how you would like to share your medical information.

**SHARE** my medical record **WITHOUT ANY EXCEPTION** of medical information categories.

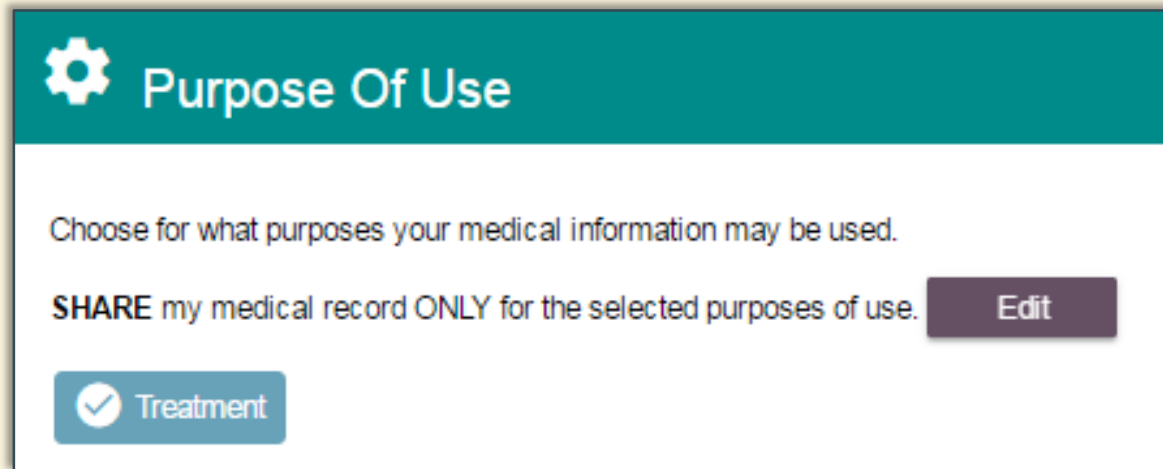
**SHARE** my medical record **WITH EXCEPTION** of specific medical information categories.


Drug use information

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



 Purpose Of Use

Choose for what purposes your medical information may be used.

**SHARE** my medical record **ONLY** for the selected purposes of use. [Edit](#)

Treatment

# 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

Share for selected purpose only

Share my information only for specified purposes of use.

Select All Deselect All

Treatment ⓘ

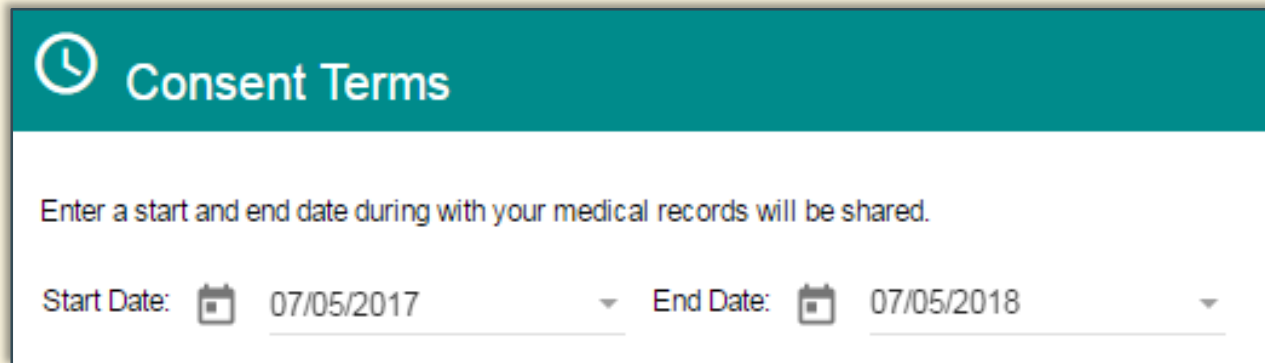
Healthcare Payment ⓘ

Healthcare Research ⓘ

Cancel Save changes

# 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



The screenshot shows a form titled "Consent Terms" with a teal header. Below the header, there is a white box containing the instruction: "Enter a start and end date during with your medical records will be shared." Below this instruction, there are two date selection fields. The first field is labeled "Start Date:" and shows a calendar icon followed by the date "07/05/2017". The second field is labeled "End Date:" and shows a calendar icon followed by the date "07/05/2018". Both fields have a small downward arrow to their right, indicating they are dropdown menus.

# Step 5: Click the Save Button

Click the Save button to save all of the settings

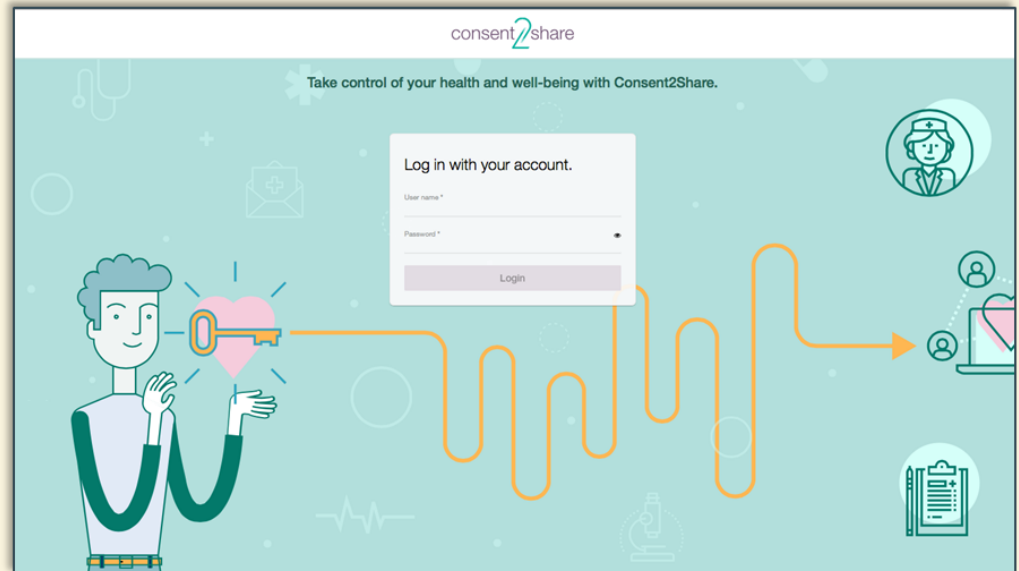
The screenshot shows a web interface for a consent form. At the top, it displays the user's name 'Bob Provider' and the 'consent2share' logo. Below the header, there is a statement: 'I, Sally Mae Share, hereby authorize...'. The form is divided into several sections:

- Select Providers:** This section contains two boxes. The first box is labeled 'The following individual or organization' and lists 'SANAGA SERVICES AND CARE LLC'. The second box is labeled 'To disclose my information to' and lists 'CAPITAL BEHAVIORAL HEALTH, LLC'.
- Medical Information:** This section asks the user to select how they would like to share their medical information. There are two radio button options: 'SHARE my medical record WITHOUT ANY EXCEPTION of medical information categories.' and 'SHARE my medical record WITH EXCEPTION of specific medical information categories.' Below these options are two buttons with lock icons: 'Drug use information' and 'Alcohol use and Alcoholism information'.
- Purpose Of Use:** This section asks the user to choose for what purposes their medical information may be used. It states 'SHARE my medical record ONLY for the selected purposes of use.' and includes an 'Edit' button. There is one checked checkbox labeled 'Treatment'.
- Consent Terms:** This section asks the user to enter a start and end date during which their medical records will be shared. It shows 'Start Date: 07/05/2017' and 'End Date: 07/05/2018'.

At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'.

# 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

The screenshot displays the 'My Consents' interface. At the top left, the user's name 'Sally Share' is shown next to a profile picture. The top right corner features the 'consent2share' logo, a language dropdown set to 'English', and a 'Menu' link. Below the header, the title 'My Consents' is followed by a teal '+ Add a Consent' button. A pagination control shows '« Previous 1 Next »'. The main content area contains a consent card with three columns: 'Authorized to share' (DENTAL DREAMS PLLC, AMANDA BRADLEY JOHNSON), 'Sharing with:' (DENTAL DREAMS PLLC, AMANDA BRADLEY JOHNSON), and 'Effective Dates:' (May 9, 2017 - May 9, 2018). Below the card, the 'Consent State:' is 'SIGNED', with a red arrow pointing to the 'SIGNED' label. A 'Manage Consents' button is located in the bottom right corner. A second pagination control '« Previous 1 Next »' is at the bottom of the page.



# Patient Step 6.2: Signs Attestation Box

Patients can then check the Consent Terms shown below

The screenshot shows a web interface for a patient named Sally Share. The page title is "Consent to Share My Medical Information". It includes a consent reference number (6) and a patient COB date (Dec 31, 1979). The form is divided into several sections: "AUTHORIZATION TO DISCLOSE", "HEALTH INFORMATION TO BE DISCLOSED", and "CONSENT TERMS".

**Consent Reference Number:** 6  
**Patient Name:** Sally Share  
**Patient COB:** Dec 31, 1979

**AUTHORIZATION TO DISCLOSE**

**Authorizes:**

Provider Name	NPI Number	Phone	Address
BARBARA KNOWLES JOHNSON	1275599609	2027201699	5505 5TH ST NW STE 403, WASHINGTON, DC, 20011-6513

**To disclose to:**

Provider Name	NPI Number	Phone	Address
VOICETRAINER, LLC	1003068739	2025906646	1701 PENNSYLVANIA AVE NW SUITE 300, WASHINGTON, DC, 20006-9505

**HEALTH INFORMATION TO BE DISCLOSED**

**To SHARE the following medical information:**

- Communicable disease information
- Drug use information
- Alcohol use and Alcoholism Information
- Mental health information
- Sexuality and reproductive health information
- HIV/AIDS information

**To SHARE for the following purpose(s):**

- Treatment

**CONSENT TERMS**

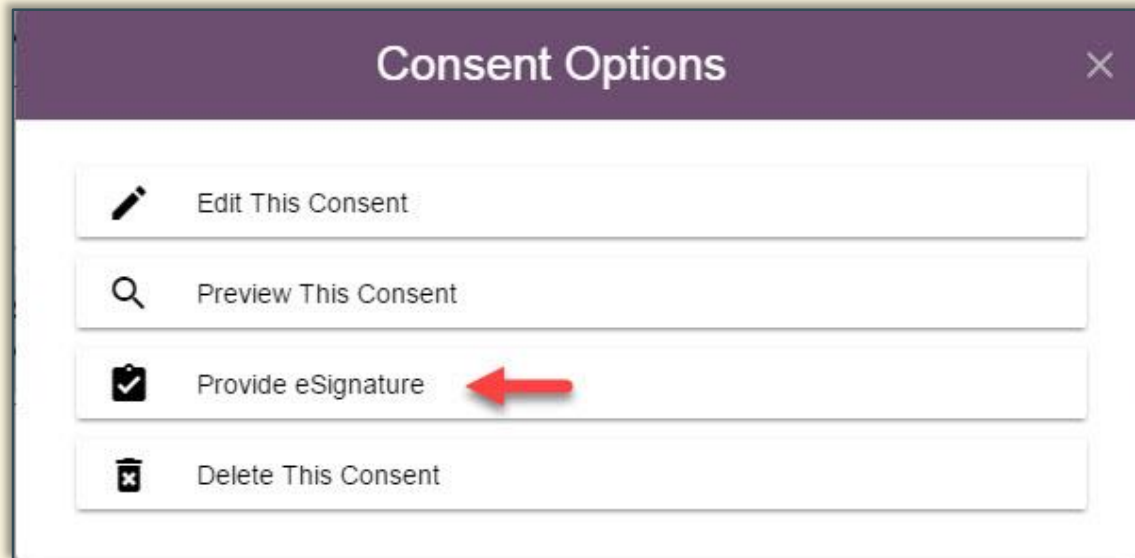
I, Sally Share, understand that my records are protected under the federal regulations governing Confidentiality of Alcohol and Drug Abuse Patient Records, 42 CFR part 2, and cannot be disclosed without my written permission or as otherwise permitted by 42 CFR part 2. I also understand that I may revoke this consent at any time except to the extent that action has been taken in reliance on it, and that any event this consent expires automatically as follows:

**Effective Date:** May 9, 2017  
**Expiration Date:** May 9, 2018

I, Sally Share, hereby accept and understand the terms of this consent.

Buttons: Cancel, Complete

# 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

The screenshot shows a web interface for a patient named Sally Share. The page title is "Consent to Share My Medical Information". At the top right, there is a logo for "consent2share" with an "English" dropdown and a "Menu" link. The main content area is divided into sections: "AUTHORIZATION TO DISCLOSE", "HEALTH INFORMATION TO BE DISCLOSED", and "CONSENT TERMS".

**Consent Reference Number:** 8  
**Patient Name:** Sally Share  
**Patient DOB:** Dec 31, 1979

**Authorizes:**

Provider Name	NPI Number	Phone	Address
BARBARA NYOWLES JOHNSON	1275968009	2027291999	5505 5TH ST NW STE 403, WASHINGTON, DC, 20011-6513

**To disclose to:**

Provider Name	NPI Number	Phone	Address
VOICETRAINER, LLC	1003066739	2025909648	1701 PENNSYLVANIA AVE NW, SUITE 300, WASHINGTON, DC, 20006-5802

**HEALTH INFORMATION TO BE DISCLOSED**

To SHARE the following medical information:

- Communicable disease information
- Drug use information
- Alcohol use and Alcoholism Information
- Mental health information
- Sexuality and reproductive health information
- HIV/AIDS information

**CONSENT TERMS**

I, Sally Share, understand that my records are protected under the federal regulations governing Confidentiality of Alcohol and Drug Abuse Patient Records, 42 CFR part 2, and cannot be disclosed without my written permission or as otherwise permitted by 42 CFR part 2. I also understand that I may revoke this consent at any time except to the extent that action has been taken in reliance on it, and that any event this consent expires automatically as follows:

**Effective Date** May 9, 2017:  I, Sally Share, hereby accept, and understand the terms of this consent.

**Expiration Date** May 9, 2018:


Buttons: Cancel, Complete

**Success in created Signed Consent** (Pop-up)

Buttons: Download Signed Consent, Continue





# Before Patient Signs Consent

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

Authorized to share: SANAGA SERVICES AND CARE LLC	Sharing with: CAPITAL BEHAVIORAL HEALTH, LLC	Effective Dates: Jul 5, 2017 - Jul 5, 2018
Consent State: <b>IN PROGRESS</b>		<a href="#">Manage Consents</a>
« Previous <b>1</b> Next »		

# After Patient Signs Consent

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

<b>Authorized to share:</b> SANAGA SERVICES AND CARE LLC	<b>Sharing with:</b> CAPITOL DIALYSIS, LLC	<b>Effective Dates:</b> Jun 28, 2017 - Jun 28, 2018
Consent State: 		<a href="#">Manage Consents</a>
<b>Authorized to share:</b> CAPITOL DIALYSIS, LLC	<b>Sharing with:</b> SANAGA SERVICES AND CARE LLC	<b>Effective Dates:</b> Jun 26, 2017 - Jun 26, 2018
Consent State: 		<a href="#">Manage Consents</a>

# 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

The screenshot shows a user interface for a healthcare provider named 'Bob Provider'. The page is titled 'My Patients' and includes a search bar and a '+ Create a Patient Account' button. A list of patients is displayed, with the entry for 'SALLY MAE SHARE' highlighted. A modal window is open over this entry, showing the following details:

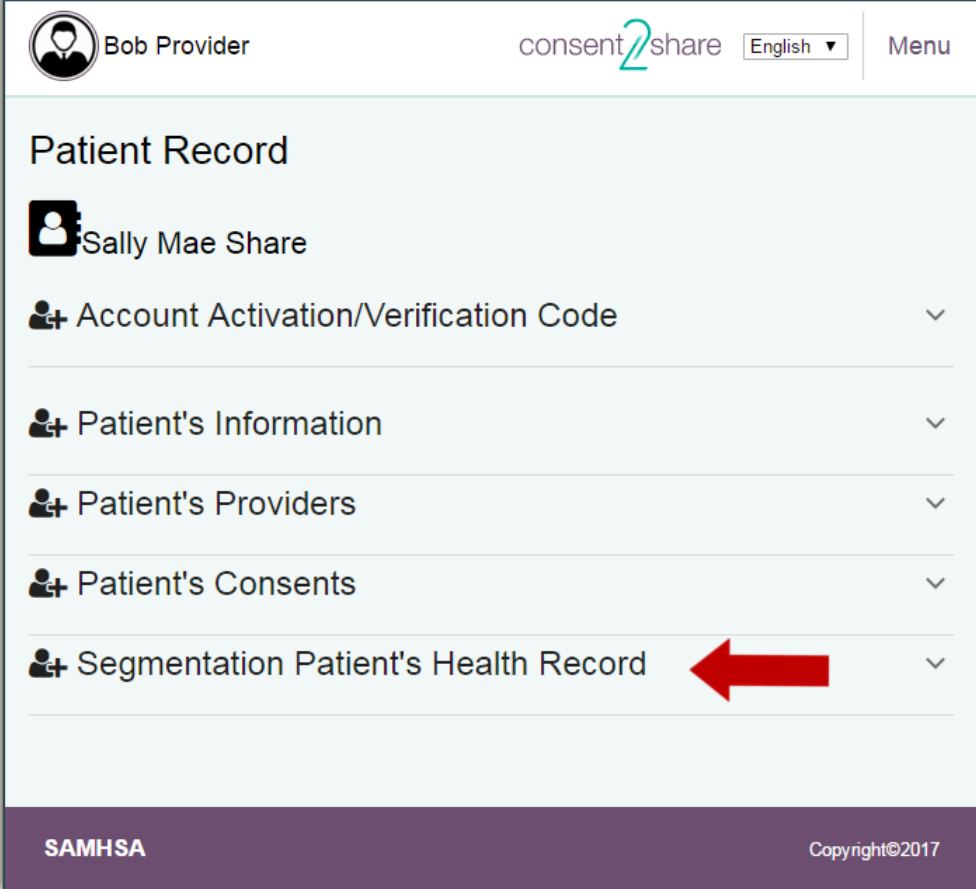
Contact Number	Address

Date of Birth
<b>Jan 1, 2000</b>

# Select Document Segmentation

Select the Segmentation Patient's Health Record Link



The screenshot displays the user interface for 'consent2share'. At the top, it shows the user 'Bob Provider' and the language set to 'English'. Below this is a list of patient record options:

- Patient Record
- Sally Mae Share
- Account Activation/Verification Code
- Patient's Information
- Patient's Providers
- Patient's Consents
- Segmentation Patient's Health Record

A red arrow points to the 'Segmentation Patient's Health Record' option. The footer of the interface includes 'SAMHSA' and 'Copyright©2017'.



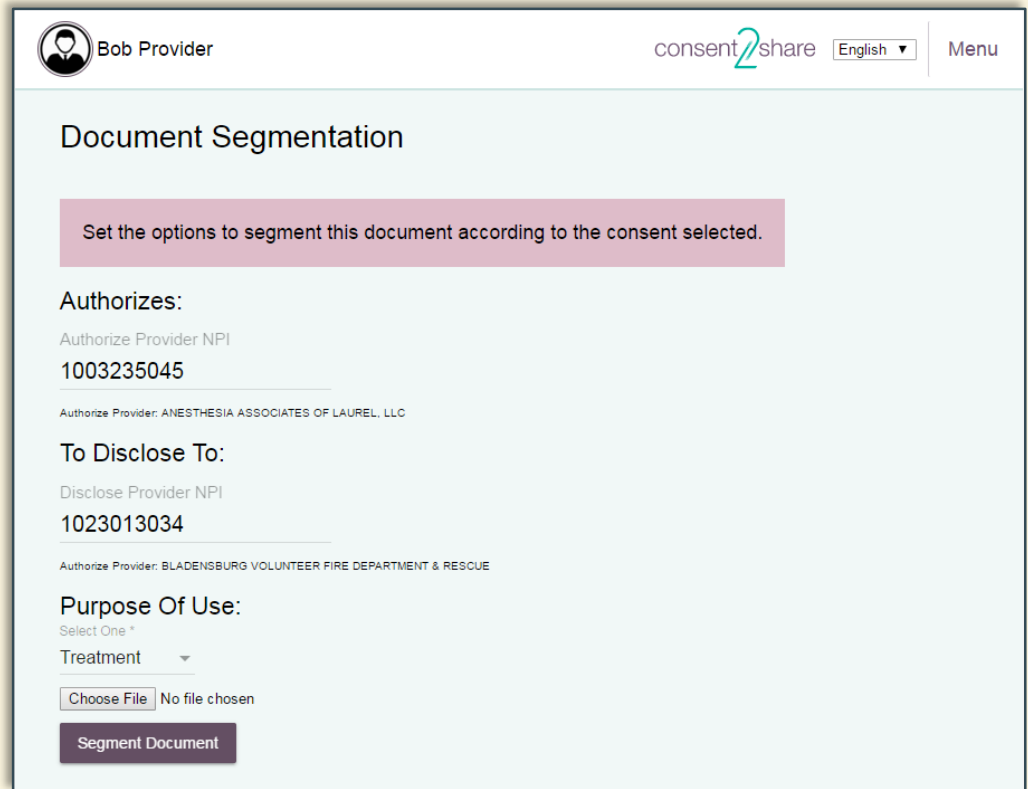
# Select Segmentation

Select the  
Segment  
Patient's  
Health Record  
Page

The screenshot shows the user interface of the consent2share application. At the top left, there is a user profile icon and the name "Bob Provider". At the top right, the logo "consent2share" is displayed, along with a language dropdown menu set to "English" and a "Menu" button. Below the header, the page title is "Segmentation Patient's Health Record". The main content area is titled "Document Segmentation" and contains a pink instruction box: "Set the options to segment this document according to the consent selected." Below this, there are three sections: "Authorizes:" with a text input field for "Authorize Provider NPI"; "To Disclose To:" with a text input field for "Disclose Provider NPI"; and "Purpose Of Use:" with a dropdown menu currently showing "Select One \*". At the bottom, there is a "Choose File" button (which says "No file chosen") and a "Segment Document" button.

# 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



The screenshot shows the 'Document Segmentation' interface in the consent2share application. At the top left, there is a user profile for 'Bob Provider'. The top right contains the 'consent2share' logo, a language dropdown set to 'English', and a 'Menu' button. The main heading is 'Document Segmentation'. Below this is a pink instruction box: 'Set the options to segment this document according to the consent selected.' The form is divided into three sections: 1. 'Authorizes:' with a field for 'Authorize Provider NPI' containing '1003235045' and the text 'Authorize Provider: ANESTHESIA ASSOCIATES OF LAUREL, LLC'. 2. 'To Disclose To:' with a field for 'Disclose Provider NPI' containing '1023013034' and the text 'Authorize Provider: BLADENSBURG VOLUNTEER FIRE DEPARTMENT & RESCUE'. 3. 'Purpose Of Use:' with a dropdown menu set to 'Treatment'. At the bottom, there is a 'Choose File' button (with 'No file chosen' text) and a 'Segment Document' button.

# 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

The screenshot shows the 'Document Segmentation' page in the consent2share application. At the top, the user is identified as 'Bob Provider'. The page title is 'Document Segmentation'. A pink instruction box states: 'Set the options to segment this document according to the consent selected.' Below this, there are three sections: 'Authorizes:' with 'Authorize Provider NPI' 1003235045 and 'Authorize Provider: ANESTHESIA ASSOCIATES OF LAUREL, LLC'; 'To Disclose To:' with 'Disclose Provider NPI' 1023013034 and 'Authorize Provider: BLADENSBURG VOLUNTEER FIRE DEPARTMENT & RESCUE'; and 'Purpose Of Use:' with a dropdown menu set to 'Treatment'. At the bottom, there is a 'Choose File' button (showing 'No file chosen') and a 'Segment Document' button.

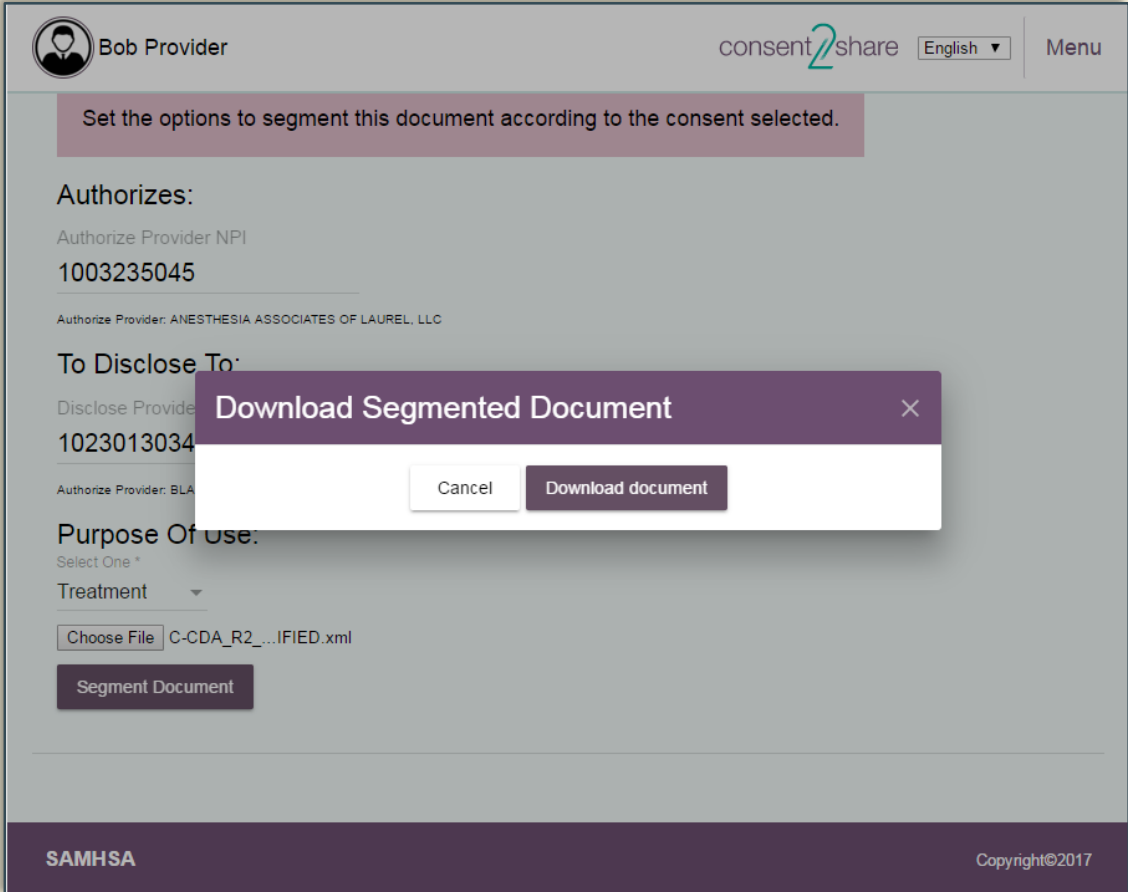
# Attach Document to be Segmented

- 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

The screenshot shows the 'Document Segmentation' page in the consent2share application. At the top left, there is a user profile for 'Bob Provider'. The top right contains the 'consent2share' logo, a language dropdown set to 'English', and a 'Menu' button. The main heading is 'Document Segmentation'. A pink instruction box states: 'Set the options to segment this document according to the consent selected.' Below this, the 'Authorizes:' section shows 'Authorize Provider NPI' as '1003235045' with the provider name 'ANESTHESIA ASSOCIATES OF LAUREL, LLC'. The 'To Disclose To:' section shows 'Disclose Provider NPI' as '1023013034' with the provider name 'BLADENSBURG VOLUNTEER FIRE DEPARTMENT & RESCUE'. The 'Purpose Of Use:' section has a dropdown menu set to 'Treatment'. At the bottom, there is a 'Choose File' button next to the filename 'C-CDA\_R2\_...IFIED.xml' and a dark purple '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



The screenshot displays the 'consent2share' web interface. At the top, it shows the user 'Bob Provider' and the language set to 'English'. A purple banner at the top of the form area reads: 'Set the options to segment this document according to the consent selected.' Below this, the form includes sections for 'Authorizes:' (with NPI 1003235045 and provider ANESTHESIA ASSOCIATES OF LAUREL, LLC), 'To Disclose To:' (with NPI 1023013034 and provider BLA...), and 'Purpose Of Use:' (with 'Treatment' selected). A file selection area shows 'Choose File' and 'C-CDA\_R2\_...IFIED.xml'. A 'Segment Document' button is visible at the bottom of the form. A modal dialog box titled 'Download Segmented Document' is overlaid on the form, containing 'Cancel' and 'Download document' buttons. The footer of the page includes 'SAMHSA' and 'Copyright©2017'.

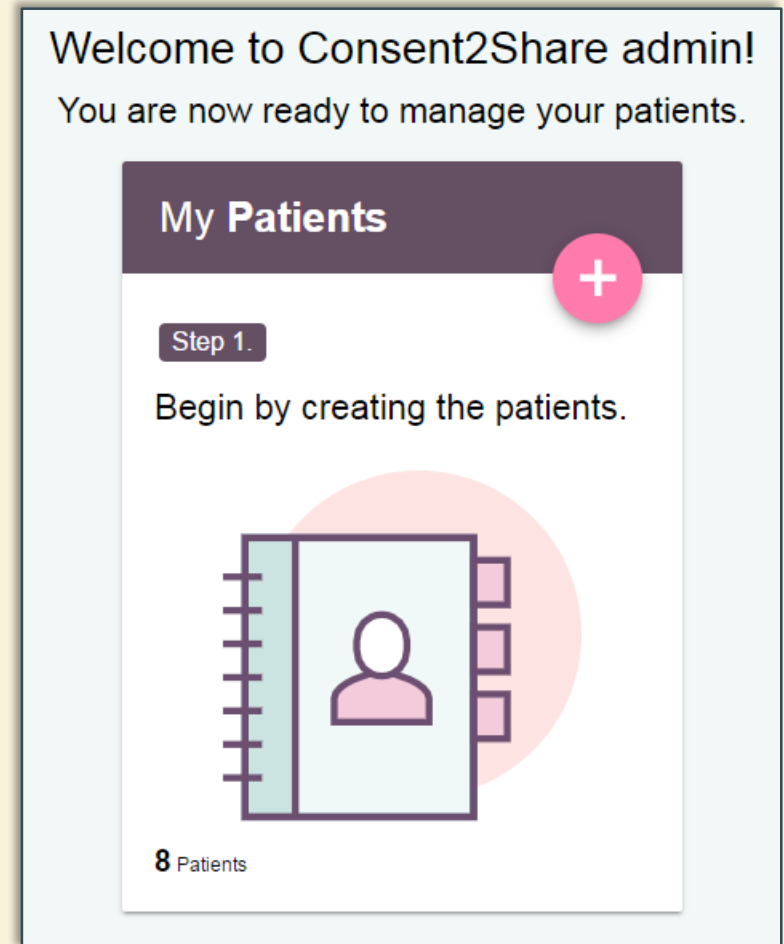
# Results: Segmented Document

- 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 Doctors Together 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

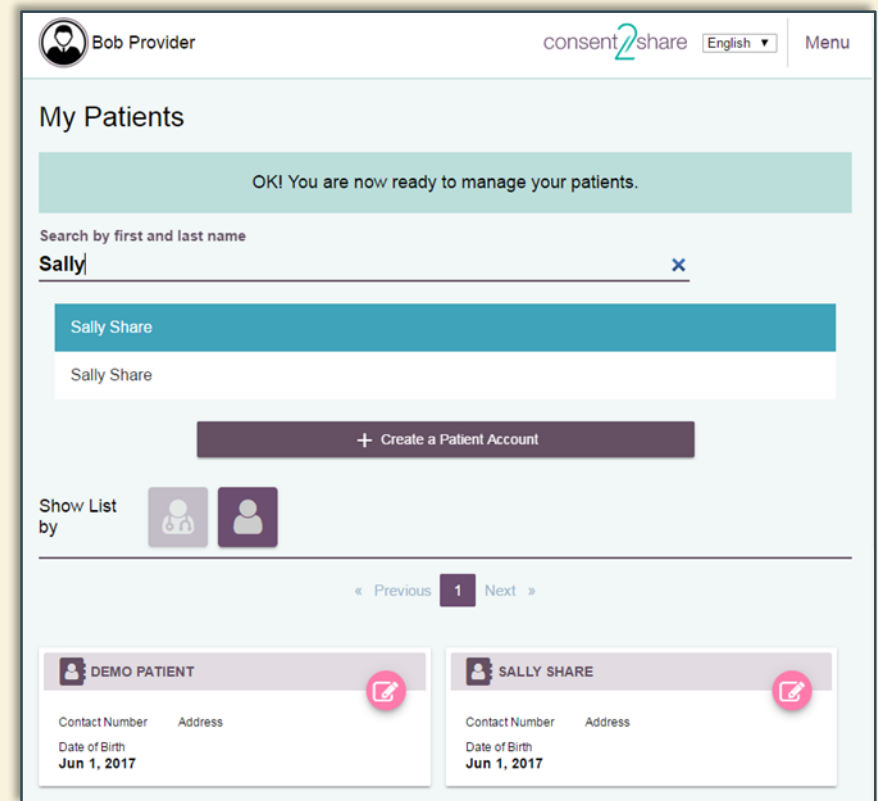
- Consent2Share includes a patient search feature
- First, log into the Provider Portal using your provider credentials
- Next, select the My Patients card
- That will open the Provider page





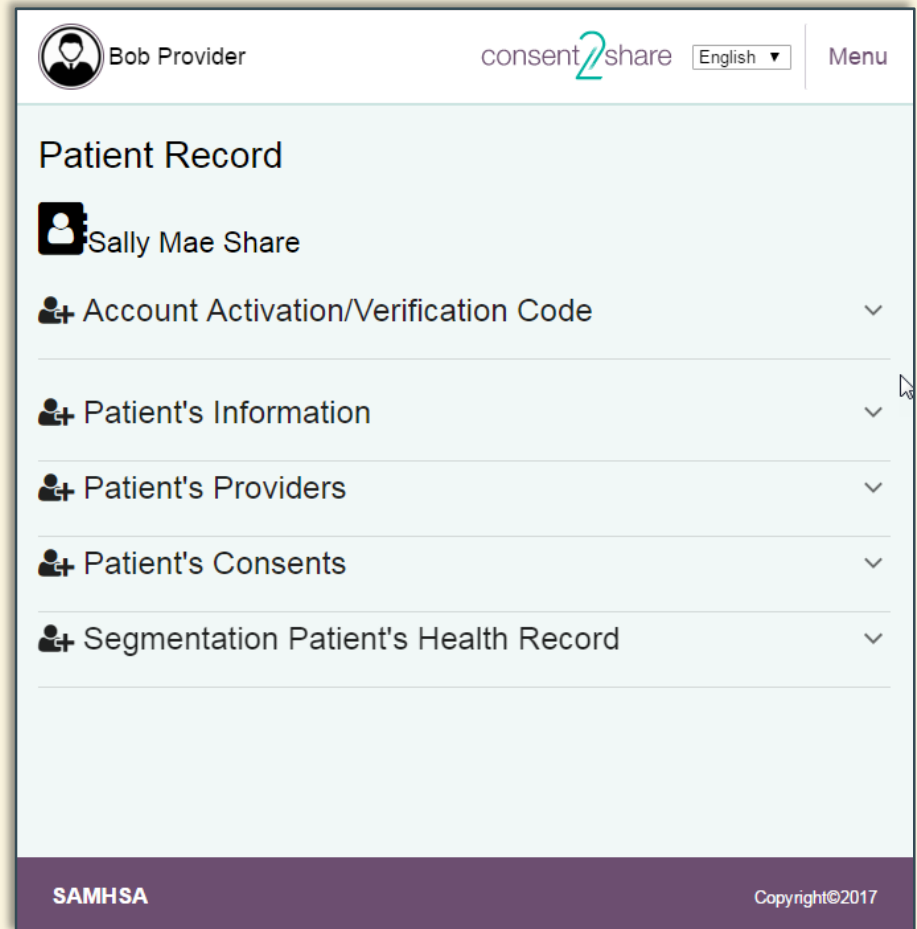
# Begin Typing Patient's Name

- 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 be 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



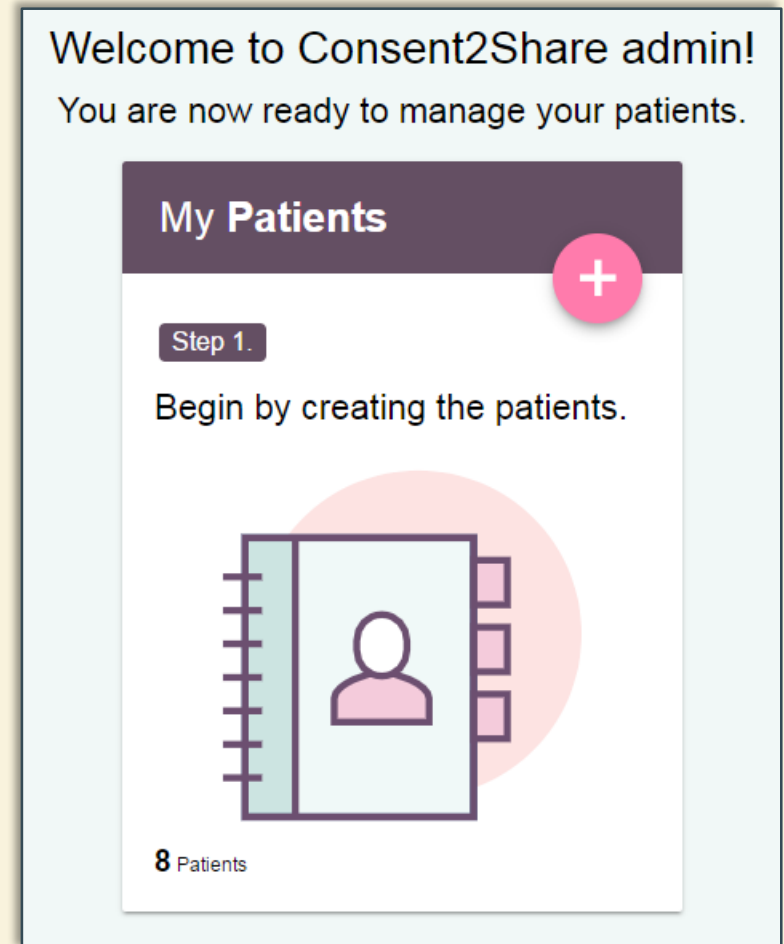
The screenshot displays the user interface for 'consent2share'. At the top, it shows the user 'Bob Provider' and the system name 'consent2share' with a language dropdown set to 'English' and a 'Menu' button. Below this is a section titled 'Patient Record' for 'Sally Mae Share'. A list of tasks is shown, each with a person icon and a plus sign, and a dropdown arrow on the right:

- Account Activation/Verification Code
- Patient's Information
- Patient's Providers
- Patient's Consents
- Segmentation Patient's Health Record

The bottom of the interface features a purple footer with 'SAMHSA' on the left and 'Copyright©2017' on the right.

# 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

Bob Provider consent2share English Menu

### My Patients

OK! You are now ready to manage your patients.

Search by first and last name

+ Create a Patient Account

Show List by

« Previous 1 Next »

**DEMO PATIENT**

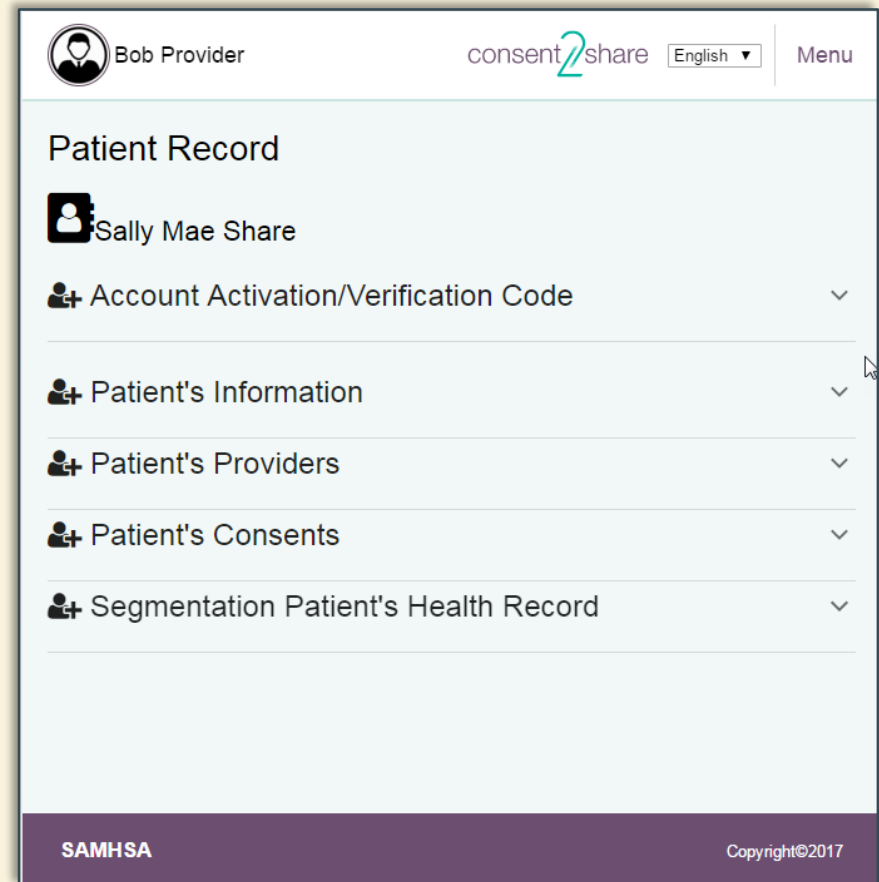
Contact Number Address  
Date of Birth  
**Jun 1, 2017**

**SALLY SHARE**

Contact Number Address  
Date of Birth  
**Jun 1, 2017**

# 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



The screenshot shows the 'Patient Record' page for 'Sally Mae Share' in the 'consent2share' system. The user is logged in as 'Bob Provider'. The page features a list of menu items with expandable options:

- Patient Record
- Sally Mae Share
- Account Activation/Verification Code
- Patient's Information
- Patient's Providers
- Patient's Consents
- Segmentation Patient's Health Record

The footer of the page displays 'SAMHSA' and 'Copyright©2017'.