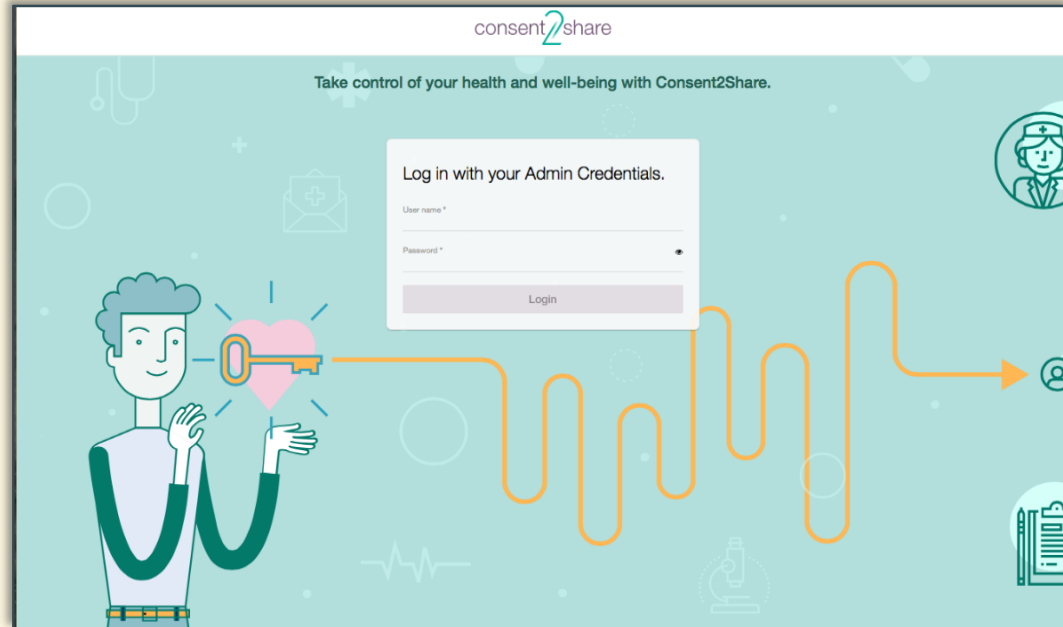



Consent2Share V3.4.0 Provider User Guide



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

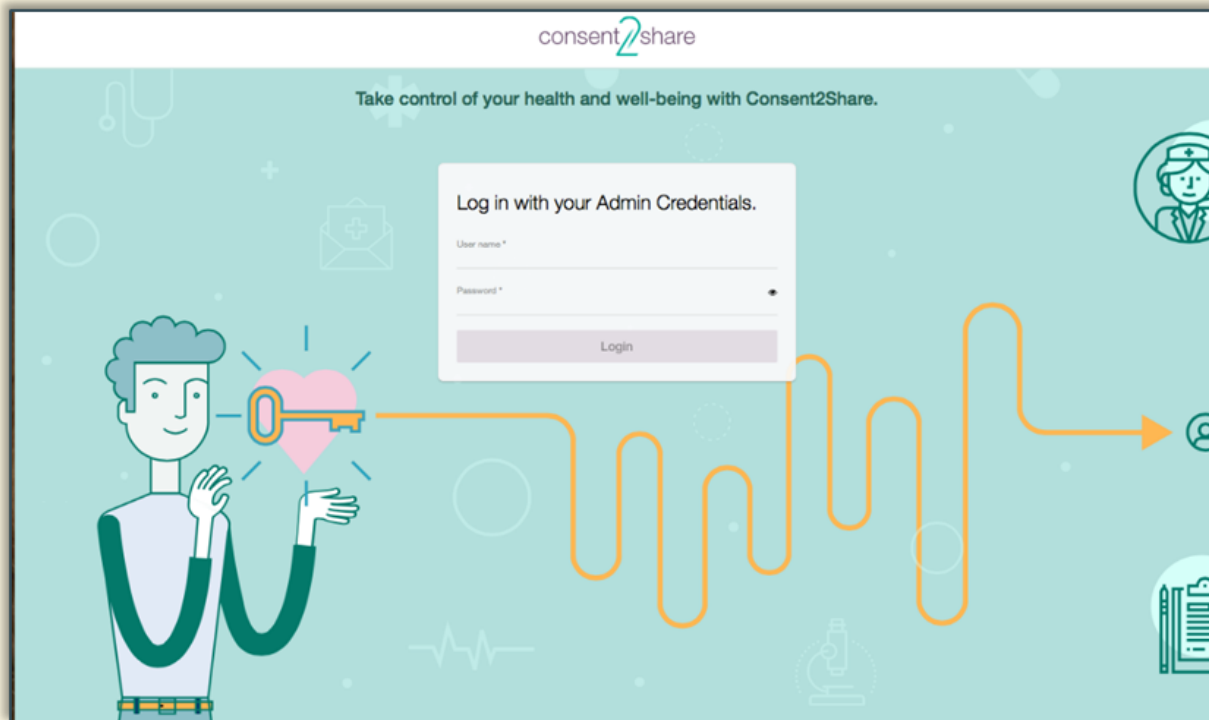


This Provider User Guide will show you how to:

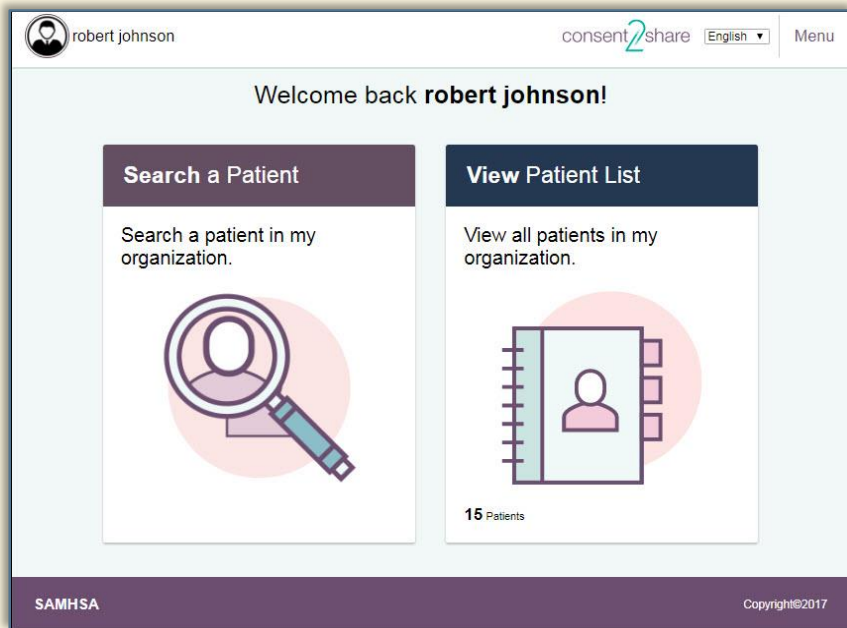
1. Create a Patient Account
2. Enter Patient Demographics
3. Activate a Patient Account
4. Add Providers
5. Create a Consent
6. Segment Patient Data
7. Search for Patients
8. Update Patient Information
9. View Consent Activity History

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
- Next, click the Search a Patient Card
- This opens the Search Patient Page

The screenshot shows the "Search Patient" page. At the top, it says "Please complete the required fields." Below this, there are four input fields: "First Name", "Last Name*", "Date of Birth", and "Gender". There is also a text input field for "MRN/Patient ID Number". At the bottom, there are three buttons: "Cancel", "+ Create New Account", and "Search". The page also includes a user profile icon for "robert johnson", the "consent2share" logo, a language dropdown set to "English", and a "Menu" button.

Click the Create a Patient Button

- On the Search Patient Page, search for a patient using the required (*) fields
- Once the search is completed, the Create New Account button is enabled
- Click the Create New Account button

The screenshot displays the 'Search Patient' interface. At the top, the user 'robert johnson' is logged in, and the system is 'consent2share' in 'English'. The search form includes the following fields:

- First Name: []
- Last Name*: [ty]
- Date of Birth: []
- Gender: []
- MRN/Patient ID Number: []

Below the form, there are three buttons: 'Clear', '+ Create New Account' (highlighted with a red box), and 'Search'. The 'Search Results' section shows a message: 'No results found. Please try again, or create a new patient.'

SAMHSA Copyright©2017

Patient Demographics Page

The Patients Demographics Page will open

The screenshot shows a web form titled "Patient Demographics Page" with a header "Patients Information". 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

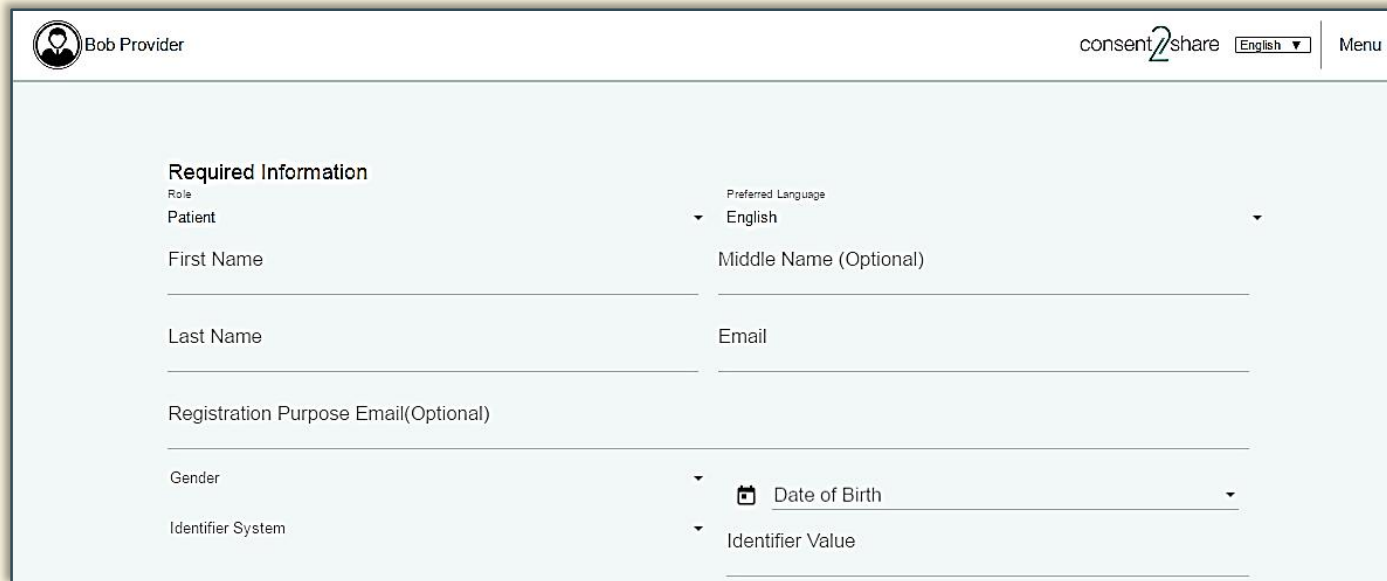
Street Line1	Street Line2 (Optional)
City	Postal Code
State	Country
Social Security Number	Phone

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

Section 2: Enter Patient Demographics

Enter the Required Information as prompted

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



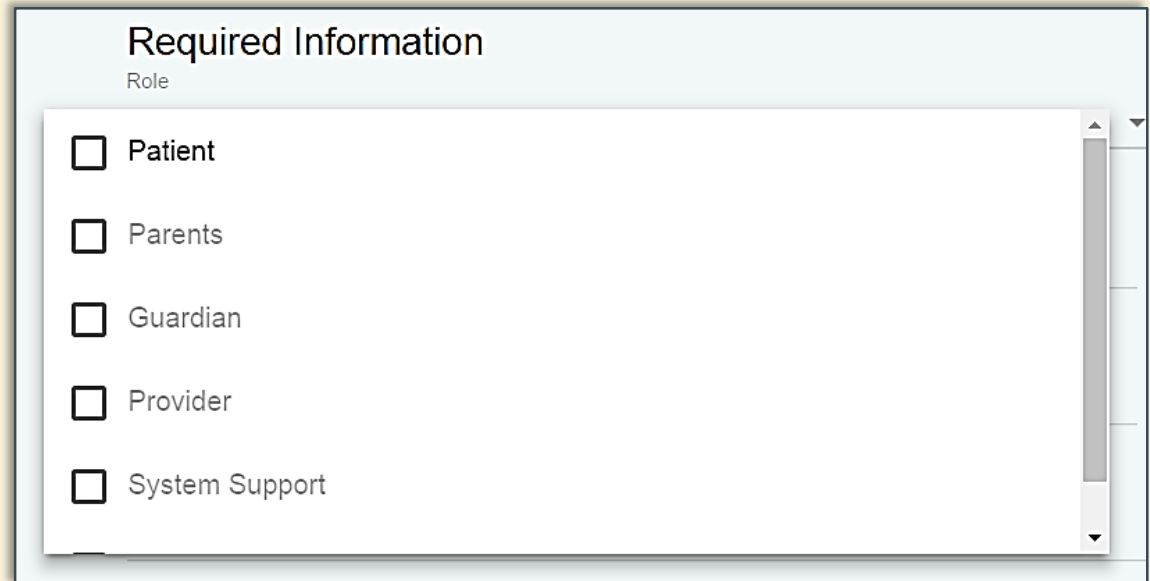
The screenshot shows a web interface for a provider named "Bob Provider" using the "consent2share" system. The language is set to "English". The form is titled "Required Information" and contains the following fields:

Field Label	Field Type	Current Value
Role	Dropdown	Patient
Preferred Language	Dropdown	English
First Name	Text Input	
Middle Name (Optional)	Text Input	
Last Name	Text Input	
Email	Text Input	
Registration Purpose Email(Optional)	Text Input	
Gender	Dropdown	
Date of Birth	Calendar Input	
Identifier System	Dropdown	
Identifier Value	Text Input	

Use Drop-down Menus

Note drop-down menus for

- ✓ Role (shown) 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

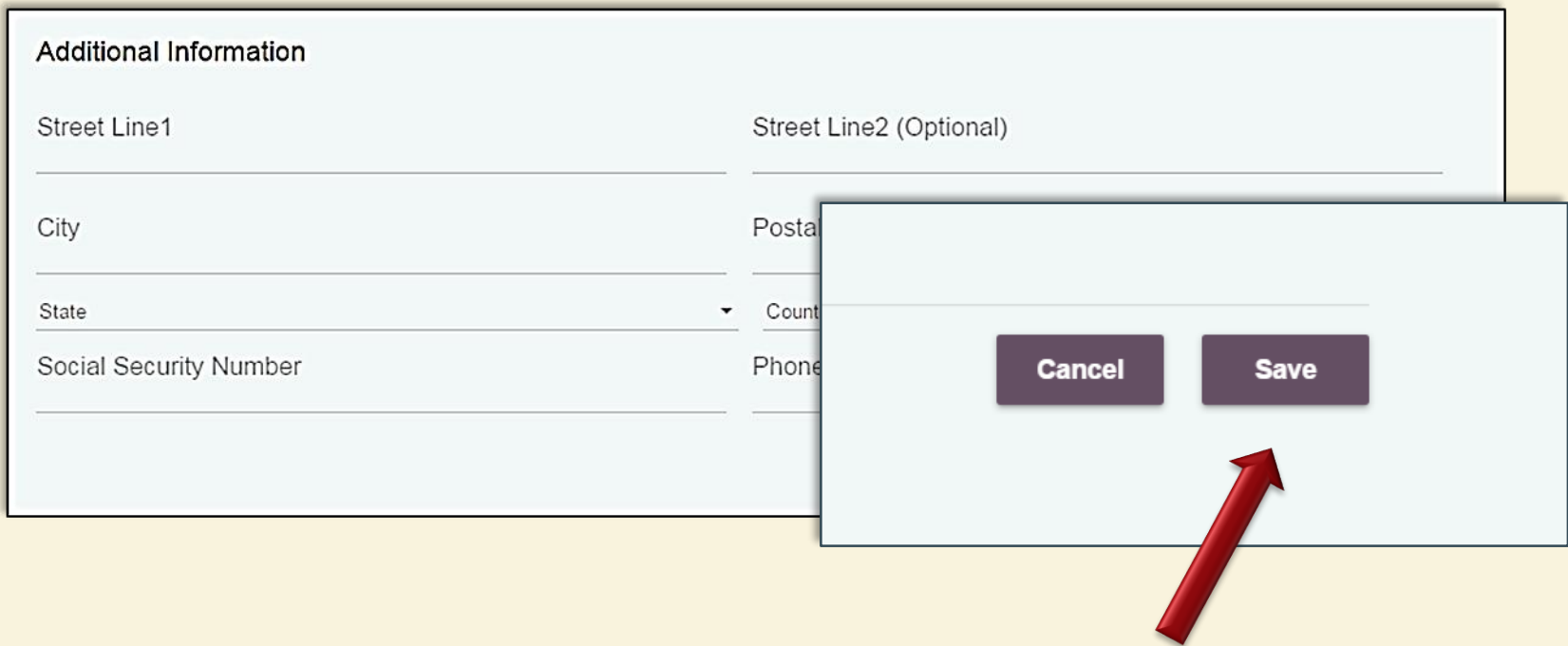
- You can also enter optional Additional Information
 - ✓ Address, Social Security number, and phone number
- You can enter the information at the time of account creation or you can update patient information later

Additional Information

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

Click Save When Finished

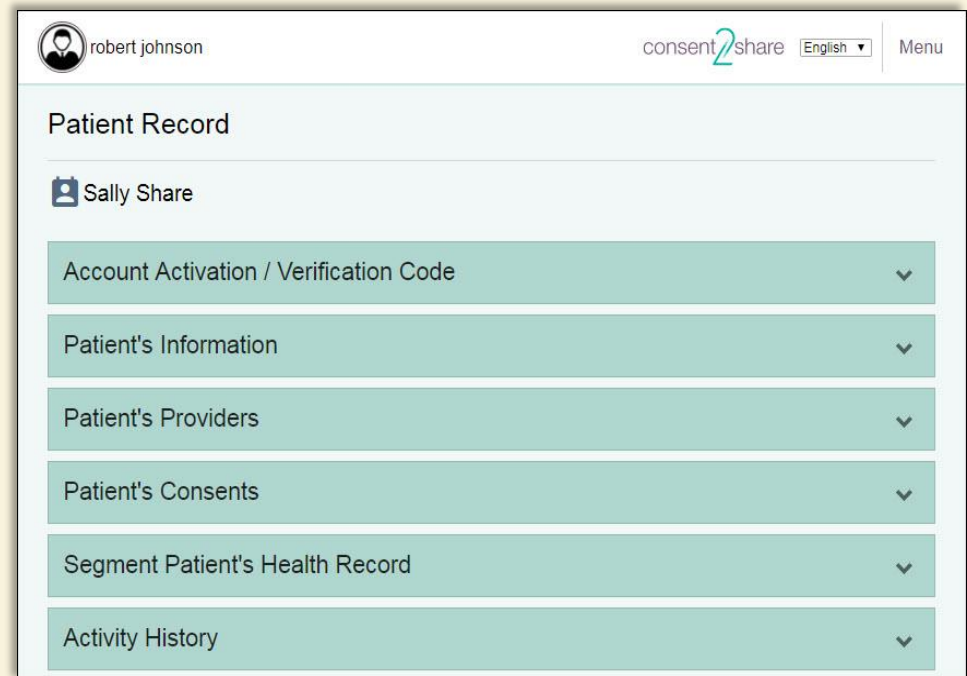
When finished entering patient information, click the Save button



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

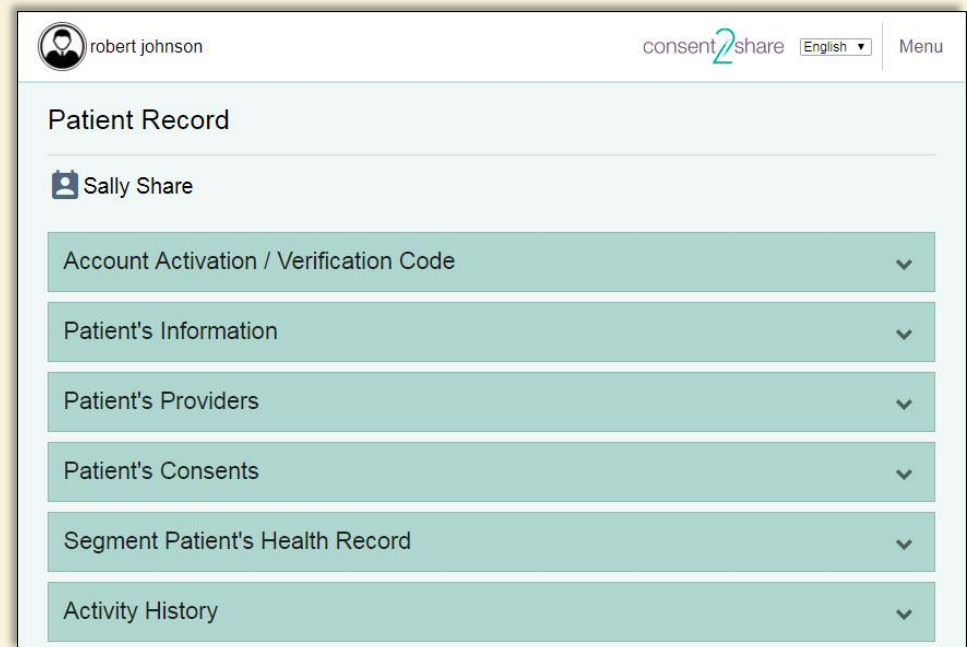
- You have now *created* a patient user account!
- The next step is to *activate* the account
- This can be done sending the patient an Account Activation Email and the patient activating the account
- The next few slides will illustrate that process



The Patient Record Page

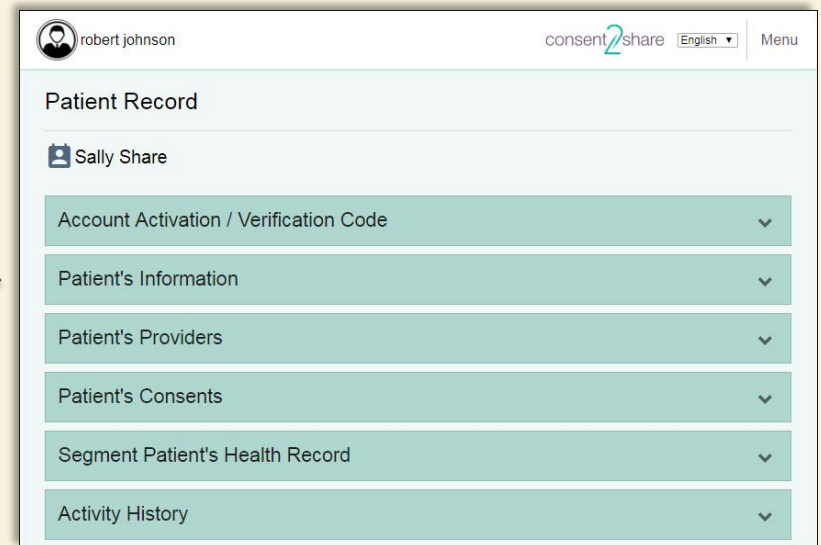
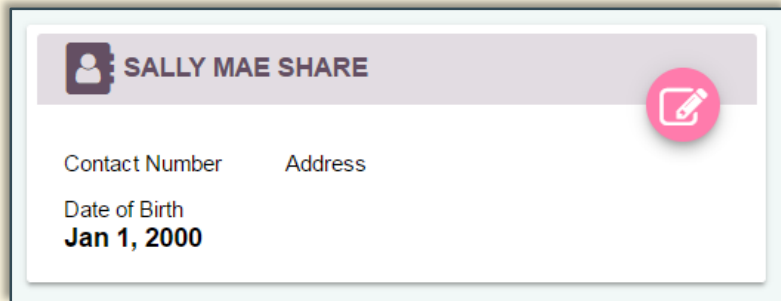
Use the Patient Record Page to:

- Send patient Account Verification Emails
- Review patient health records
- View and add providers
- Create a patient consent
- Segment a patient health record



Open Patient Record

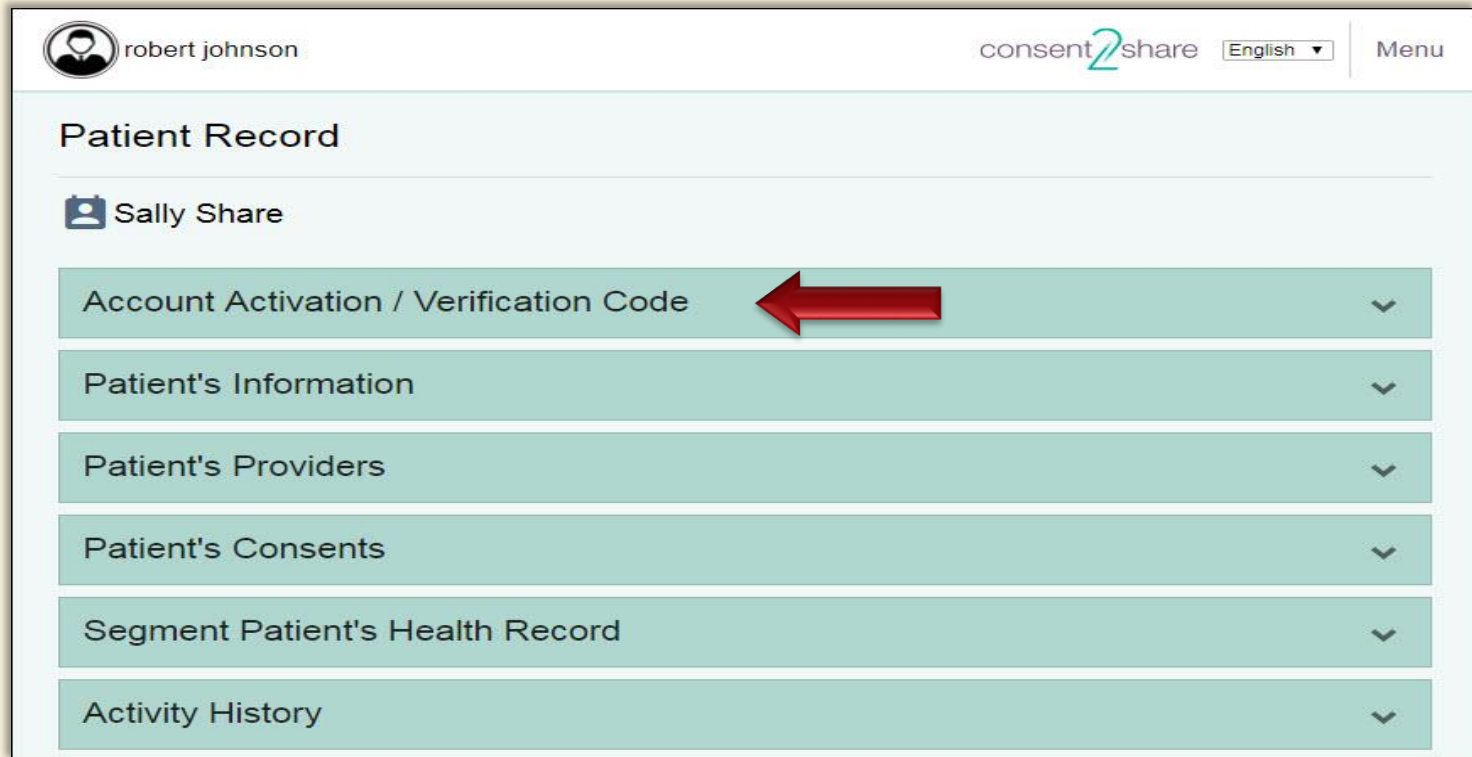
- To begin the activation process, first click on the Patient Card on the Create a Patient Account Page



- This opens the patient's Patient Record Page

Open Account Activation Page

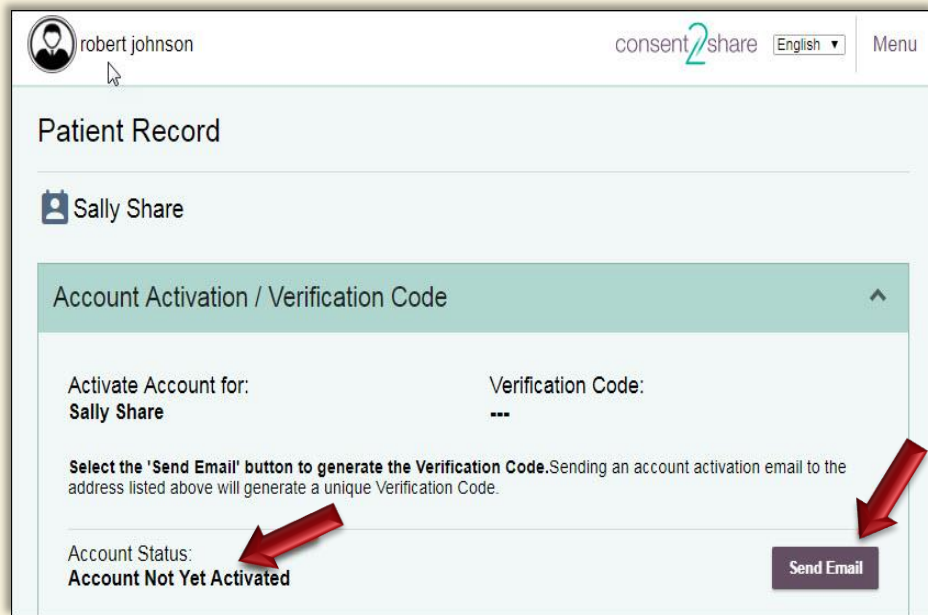
On the Patient Record Page, click the Account Activation/Verification Code Link



The screenshot displays the user interface for the 'consent2share' system. At the top left, there is a user profile icon and the name 'robert johnson'. To the right, the system name 'consent2share' is visible, along with a language dropdown menu set to 'English' and a 'Menu' button. Below the header, the main content area is titled 'Patient Record'. Underneath this title, there is a sub-section for 'Sally Share' with a person icon. A list of menu items follows, each with a downward-pointing chevron icon on the right. A red arrow points to the first item, 'Account Activation / Verification Code'. The other items in the list are 'Patient's Information', 'Patient's Providers', 'Patient's Consents', 'Segment Patient's Health Record', and 'Activity History'.

Menu Item	Action
Account Activation / Verification Code	Click (indicated by red arrow)
Patient's Information	Expand
Patient's Providers	Expand
Patient's Consents	Expand
Segment Patient's Health Record	Expand
Activity History	Expand

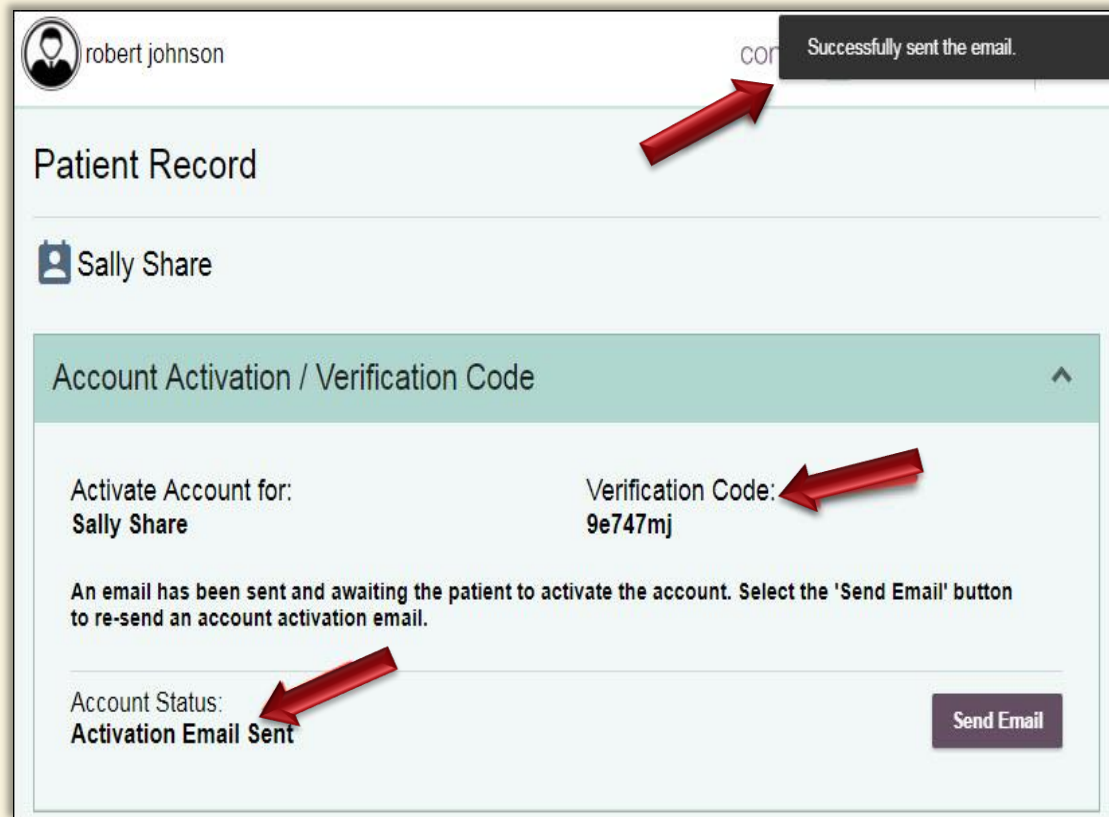
Send Account Verification Email



The screenshot shows a web interface for 'consent2share'. At the top left, there is a user profile for 'robert johnson'. The main content area is titled 'Patient Record' and lists 'Sally Share'. Below this is a section for 'Account Activation / Verification Code'. It contains the following text: 'Activate Account for: Sally Share' and 'Verification Code: ---'. A note states: '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, it says 'Account Status: Account Not Yet Activated'. At the bottom right, there is a 'Send Email' button. 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 and Verification Code to the patient
- You can select language
- Note that the account is not yet activated

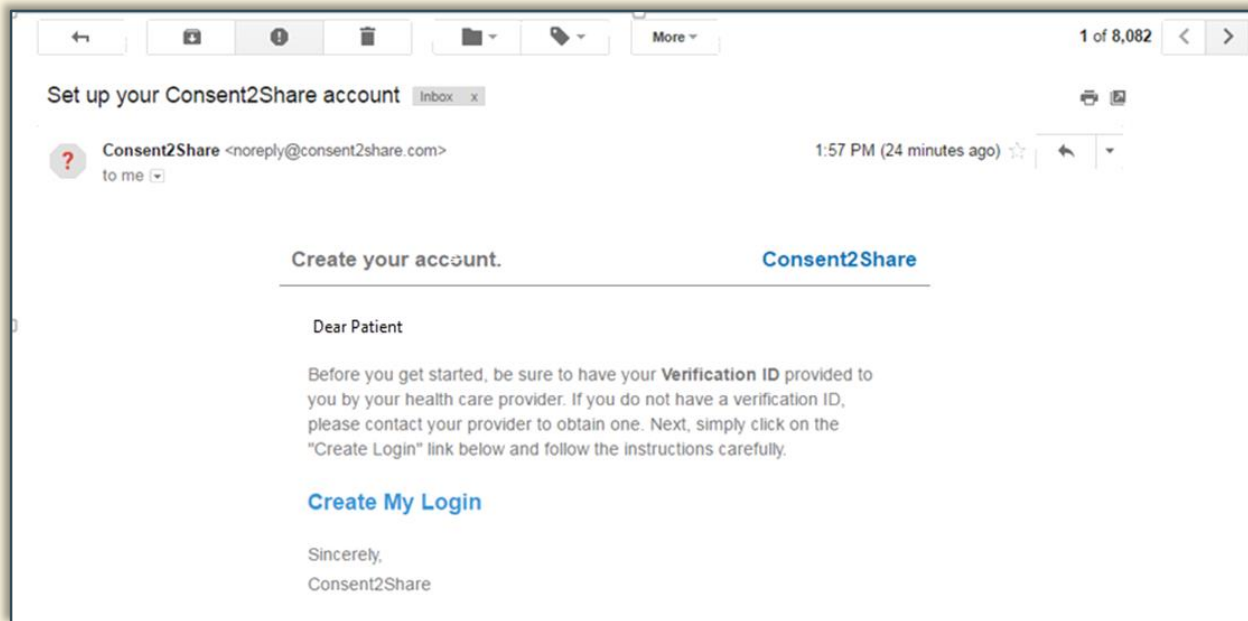
Notification of Sent Validation Code



- 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

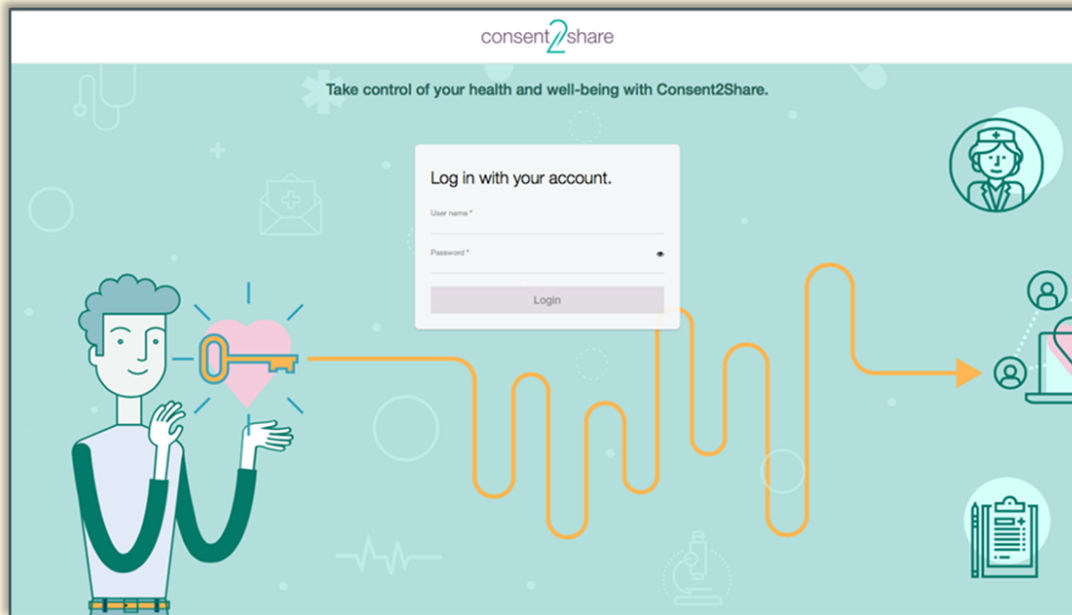
Patient Activates the Account

- 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




The screenshot shows the 'Patient Record' page for a user named 'robert johnson'. The page header includes the user's name, the 'consent2share' logo, a language dropdown set to 'English', and a 'Menu' button. Below the header, the 'Patient Record' section is displayed. A sub-section for 'Sally Share' is visible. The main content area contains a list of menu items, each with a dropdown arrow:

- Account Activation / Verification Code
- Patient's Information
- Patient's Providers
- Patient's Consents
- Segment Patient's Health Record
- Activity History

Add First Provider

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



The screenshot displays the 'Patient's Providers' interface. At the top, the title 'Patient's Providers' is shown with an upward arrow icon. Below the title is a light blue warning box containing the text: 'OK! You must add at least two contacts before sharing your health information.' Centered below this is a teal button with a white plus sign and the text '+ Add a Health Provider'. Underneath the button is the section header 'Current Provider List'. At the bottom, a pink box contains 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

Search

1 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

2 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)

Clear All Search

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, there is a user profile icon labeled 'Bob Provider'. At the top right, there is a 'consent2share' logo with a language dropdown set to 'English' and a 'Menu' button. Below the header is a search bar with the text 'Search Providers' and a search icon. The search results are divided into two main sections:

- Left Section: Please select to add.** This section contains a list of search results. The first result is highlighted in green and includes a '+ Select this provider.' button, which is pointed to by a red arrow. The provider details are: 'SANAGA SERVICES AND CARE LLC [NPI: 1023132966]', '1943 BENNETT PL NE, WASHINGTON, DC, 20002-4113', and '(202) 341-8888'. Navigation links '« Previous 1 Next »' are visible above and below the list.
- Right Section: Selections to add.** This section has a header 'Selections to add' and a table with columns 'NPI' and 'Name/Facility'. The table is currently empty, displaying 'No Providers currently selected.' Below the table is 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

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 user interface for managing a provider list. At the top, the user is identified as 'Bob Provider'. The page has a search bar and two main sections: 'Please select to add' and 'Selections to add'. The 'Please select to add' section shows a list of providers, with the first one, 'CAPITAL AREA MEDICAL NUTRITION ASSOCIATES PLLC', highlighted in green and marked with a plus sign. The 'Selections to add' section contains a table with two rows of provider information, each with a red minus sign in the first column. Below the table is a button labeled 'Add to Provider List'. A large red arrow points to this button.

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

Selections to add

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

Add to Provider List

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 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 this 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'. To the left of the main content area, there is a 'Show List by' section with three icons: a person with a stethoscope, a hospital building, and a person icon. Below this is a pagination control showing '« Previous 1 Next »'. The main content area contains two provider cards. Each card has a header with a person icon and the provider name, followed by their NPI, address, and contact number. A trash icon is visible on the right side of each card.

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



Patient Record

 Sally Mae Share

 Account Activation/Verification Code ▼

 Patient's Information ▼

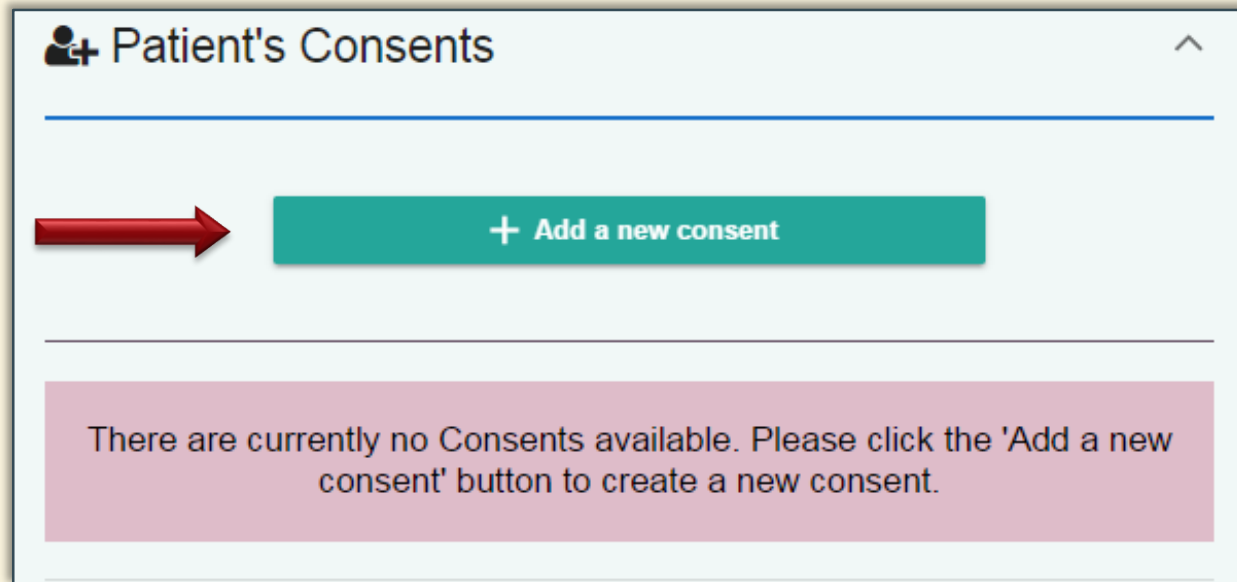
 Patient's Providers ▼

 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

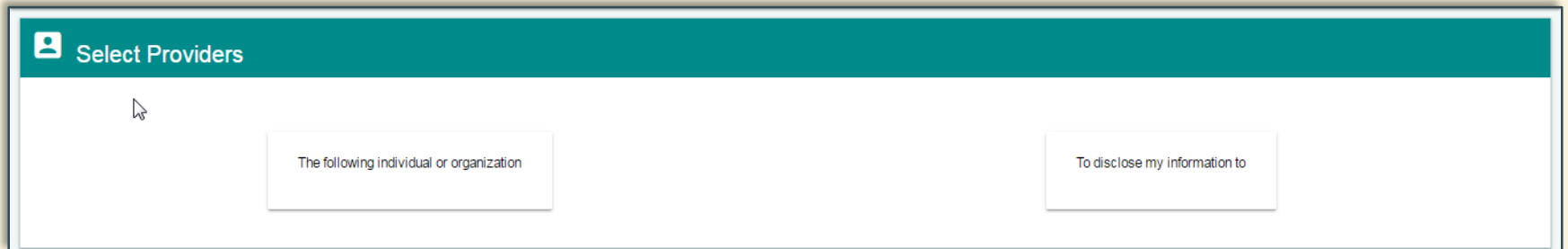
Consent Terms

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

Start Date: End Date:

Step 1: Select Providers

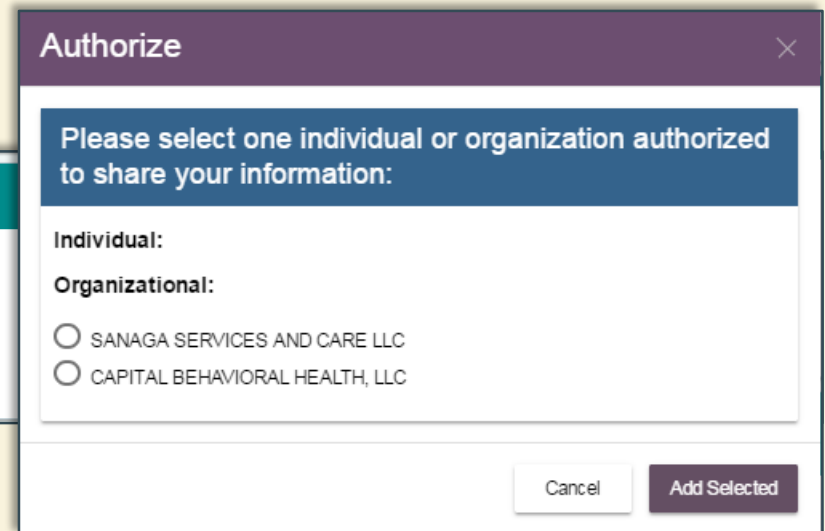
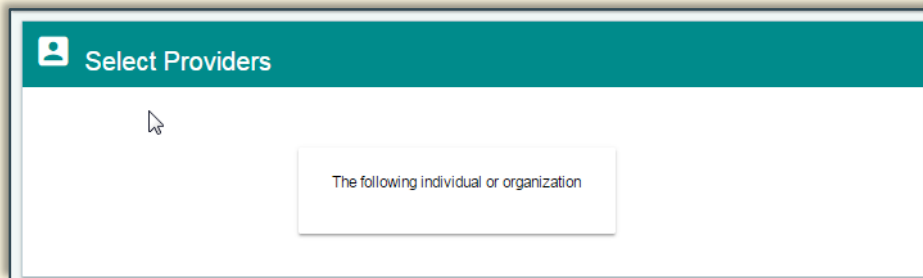
- You will need to select the “From” and “To” providers



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

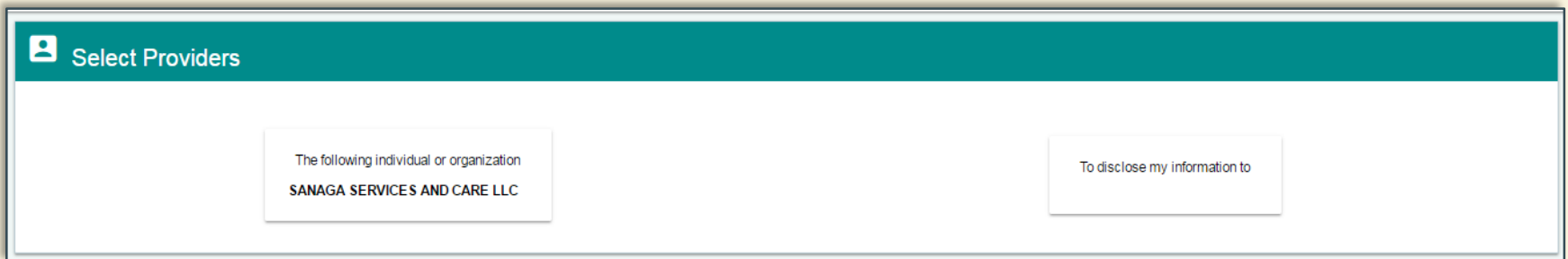
Select the “From” Provider

- 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

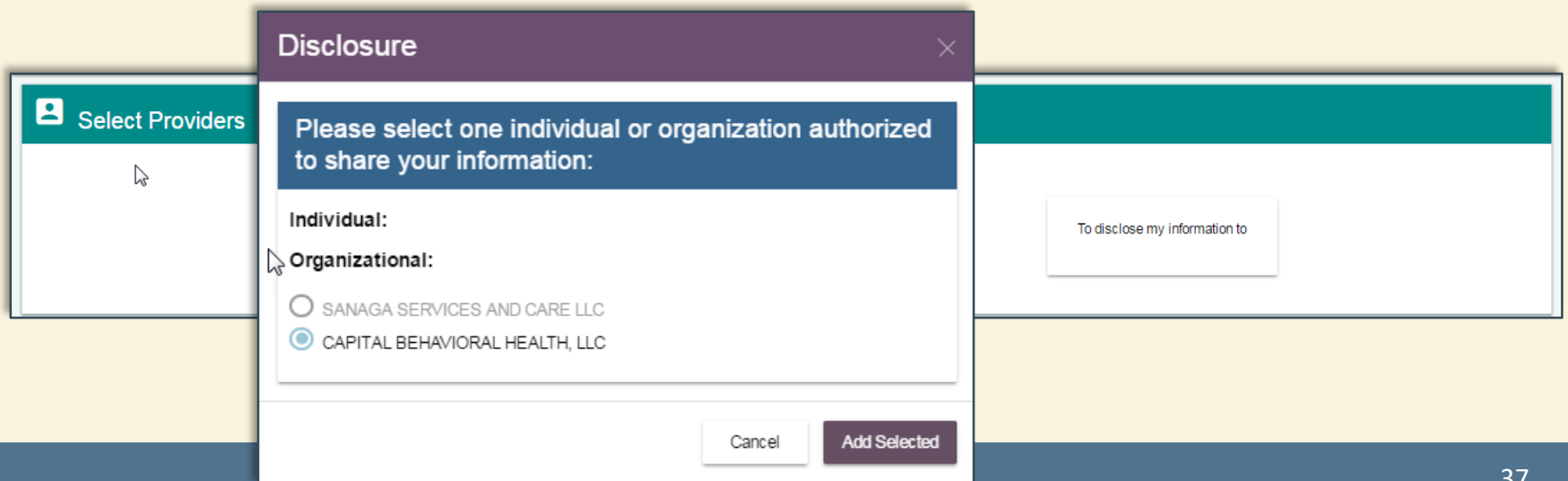


The screenshot shows a web form titled "Select Providers" with a teal header. The form contains two input fields. The left field, labeled "From", is populated with the text "SANAGA SERVICES AND CARE LLC". The right field, labeled "To disclose my information to", is currently empty.

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

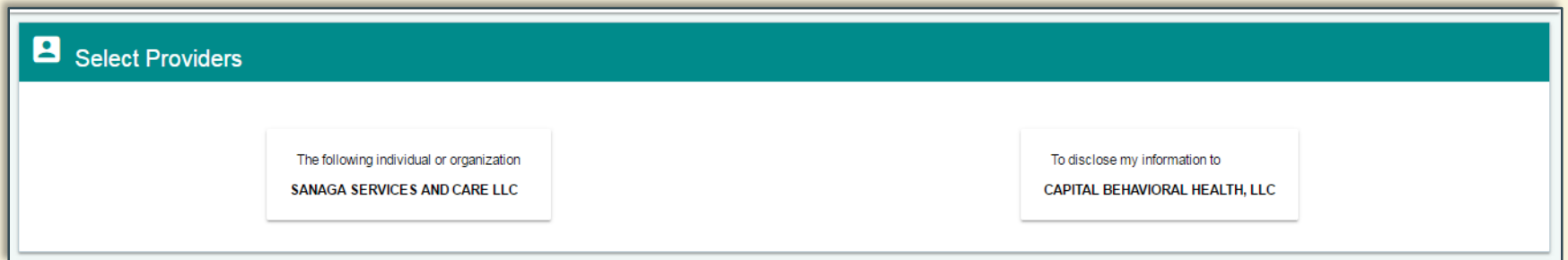
Select “To” Provider

- 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 'Select Providers' interface with a teal header. Below the header, there are two white boxes with black text. 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'.

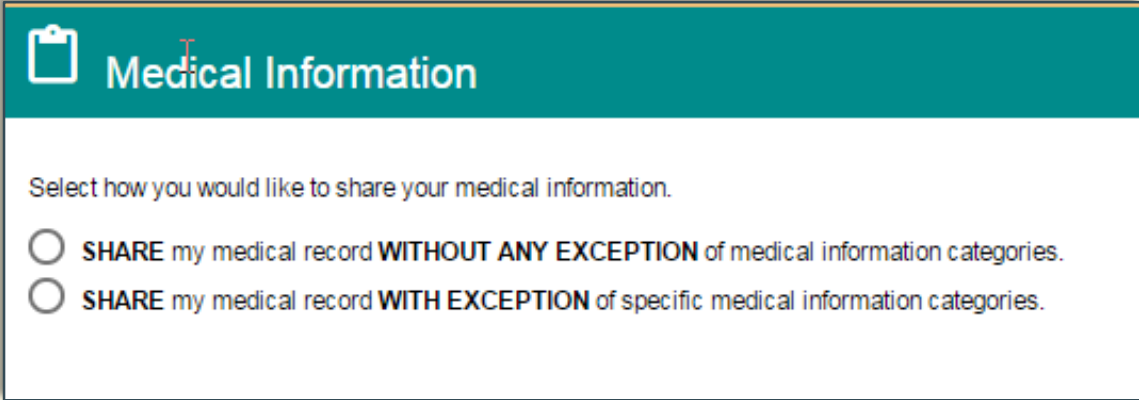
Select Providers


The following individual or organization
SANAGA SERVICES AND CARE LLC

To disclose my information to
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



 Medical Information

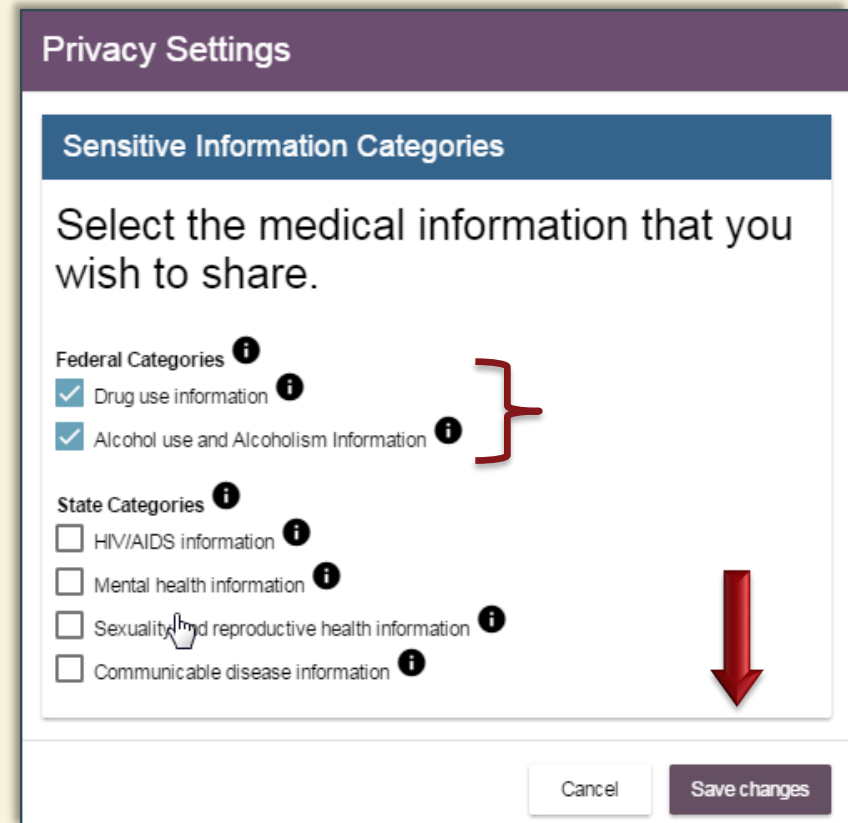
Select how you would like to share your medical information.

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

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

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 Information and 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 contains the instruction 'Select the medical information that you wish to share.' There are two sections: 'Federal Categories' and 'State Categories'. Under 'Federal Categories', there are two checked items: 'Drug use information' and 'Alcohol use and Alcoholism Information'. A red bracket groups these two items. Under 'State Categories', there are four unchecked items: 'HIV/AIDS information', 'Mental health information', 'Sexuality and reproductive health information', and 'Communicable disease information'. A red arrow points downwards from the bottom right of the list. At the bottom 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.

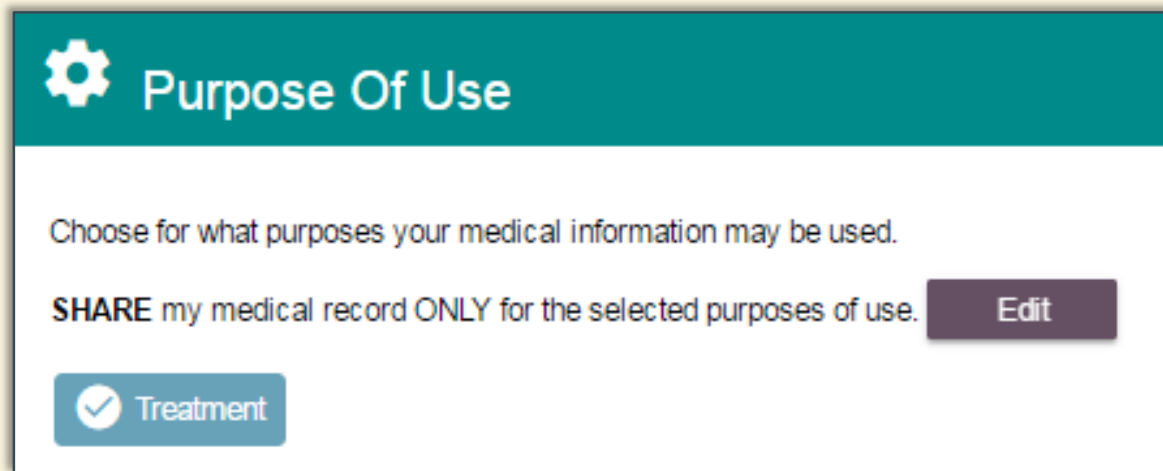
SHARE my medical record **WITH EXCEPTION** of specific medical information categories.


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 ⓘ

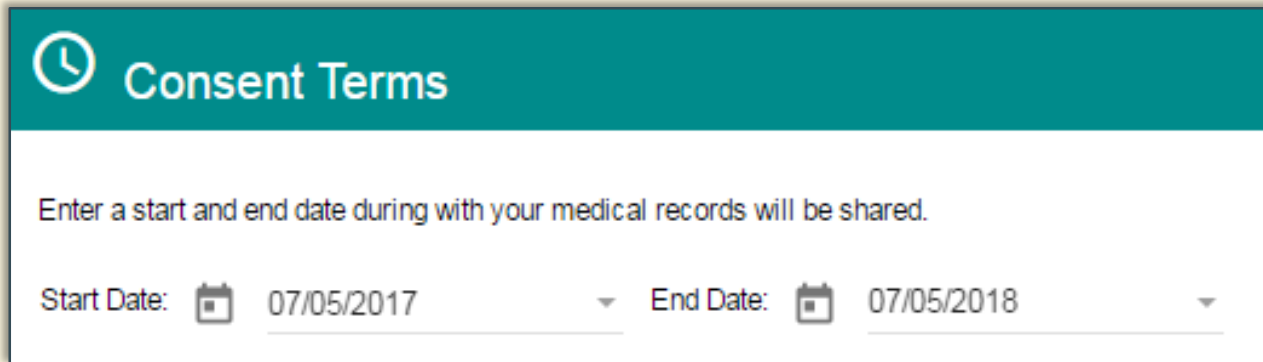
Healthcare Payment ⓘ

Healthcare Research ⓘ

Cancel Save changes

Step 4: Select Consent Terms

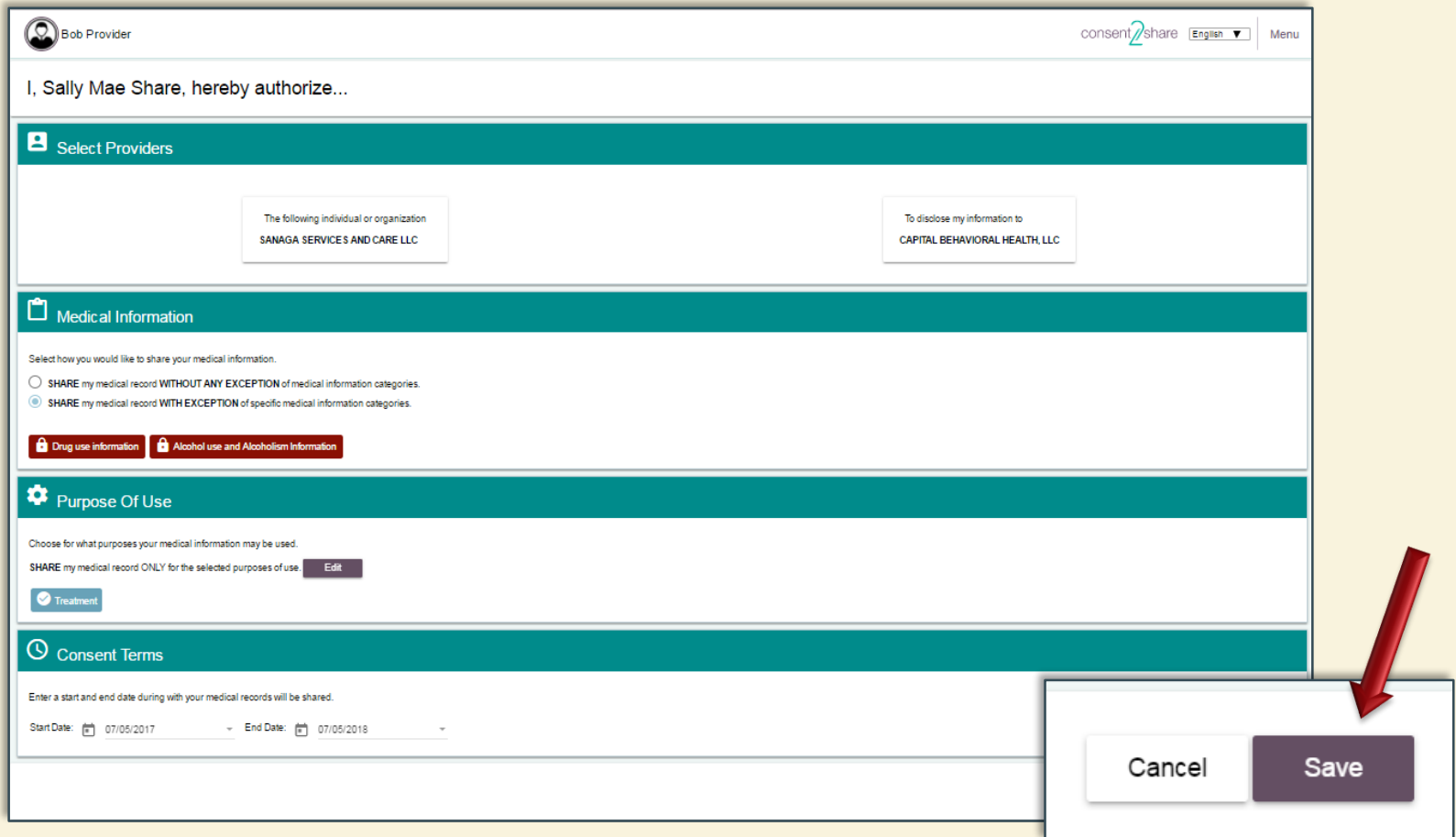
- Next, select a start date and an end date during which the patient's medical records will be shared
- By default, the system will select today's date as the start date
- The system will select an end date one year in the future
- You can choose to edit the start and end dates as needed



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

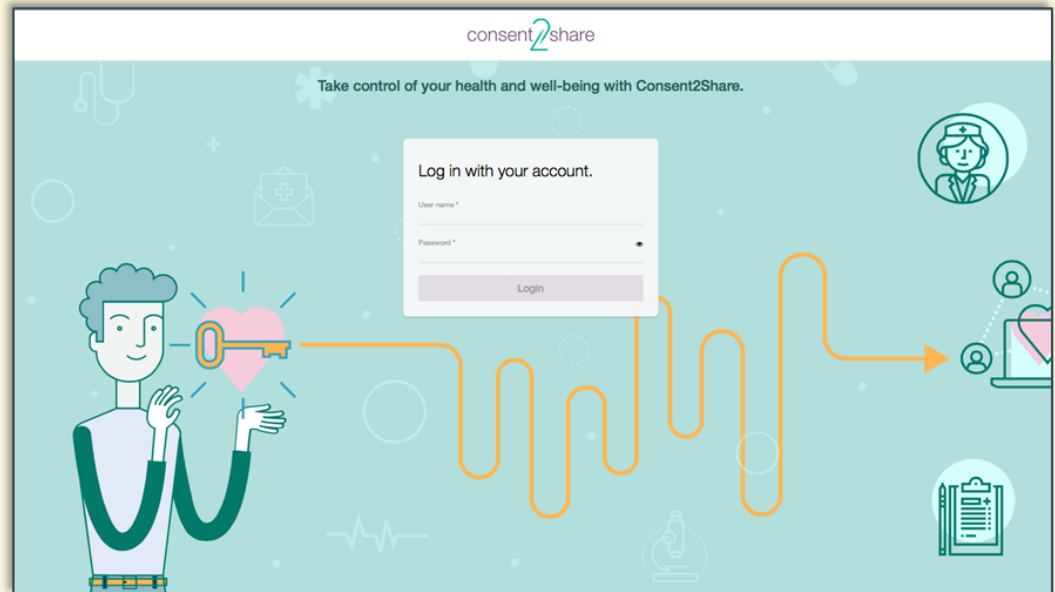
Click the Save button to save all of the settings



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 section for 'Select Providers' with two options: 'SANAGA SERVICES AND CARE LLC' and 'CAPITAL BEHAVIORAL HEALTH, LLC'. The 'Medical Information' section allows the user to select how to share their medical information, with the option 'SHARE my medical record WITH EXCEPTION of specific medical information categories' selected. There are also buttons for 'Drug use information' and 'Alcohol use and Alcoholism information'. The 'Purpose Of Use' section has a 'Treatment' option selected. The 'Consent Terms' section includes a start and end date range from 07/05/2017 to 07/05/2018. A red arrow points to a 'Save' button in a modal window at the bottom right, next to a 'Cancel' button.

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. On the top right, the 'consent2share' logo is present along with a language dropdown set to 'English' and a 'Menu' link. The main heading is 'My Consents', followed by a teal '+ Add a Consent' button. Below this is a pagination control showing '« Previous 1 Next »'. The consent card is divided into three sections: '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). At the bottom left, the 'Consent State:' is 'SIGNED', with a red arrow pointing to the 'SIGNED' button. A 'Manage Consents' button is located at the bottom right. A second pagination control '« Previous 1 Next »' is at the very bottom.

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), patient name (Sally Share), 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". The "AUTHORIZATION TO DISCLOSE" section lists the provider (BARBARA KNOWLES JOHNSON) and the entity to disclose to (VOICETRAINER, LLC). The "HEALTH INFORMATION TO BE DISCLOSED" section lists various types of medical information to be shared, such as communicable disease, drug use, alcohol use, mental health, and HIV/AIDS information. The "CONSENT TERMS" section includes a statement of understanding and a checkbox for the patient to accept the terms. A red arrow points to the checkbox. The form also includes "Cancel" and "Complete" buttons.

Consent to Share My Medical Information

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

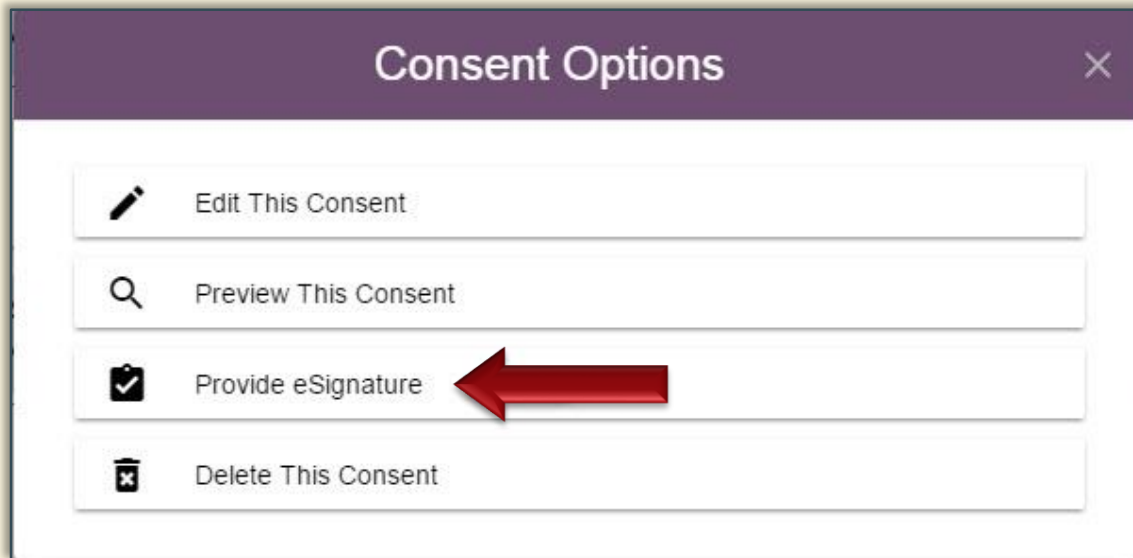
I, Sally Share, understand that my records are protected under the federal regulations governing Confidentiality of Alcohol and Drug Abuse Patient Records, 42 CFR part 2, and cannot be disclosed without my written permission or as otherwise permitted by 42 CFR part 2. I also understand that I may revoke 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.

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". It includes a header with the patient's name, a language dropdown set to "English", and a "Menu" button. 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

AUTHORIZATION TO DISCLOSE

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: IN PROGRESS		Manage Consents
« Previous 1 Next »		

After Patient Signs Consent

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

Authorized to share: SANAGA SERVICES AND CARE LLC	Sharing with: CAPITOL DIALYSIS, LLC	Effective Dates: Jun 28, 2017 - Jun 28, 2018
Consent State: 		
Authorized to share: CAPITOL DIALYSIS, LLC	Sharing with: SANAGA SERVICES AND CARE LLC	Effective Dates: Jun 26, 2017 - Jun 26, 2018
Consent State: 		

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

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 »

Contact Number	Address
DEMO PATIENT	
SALLY	
SALLY MAE SHARE	
HTTPS CHECK	

Contact Number Address

Date of Birth
Jan 1, 2017

Contact Number Address

Date of Birth
Jan 1, 2017

Contact Number Address

Date of Birth
Jan 1, 2000

Contact Number Address

Date of Birth
Jan 1, 2017

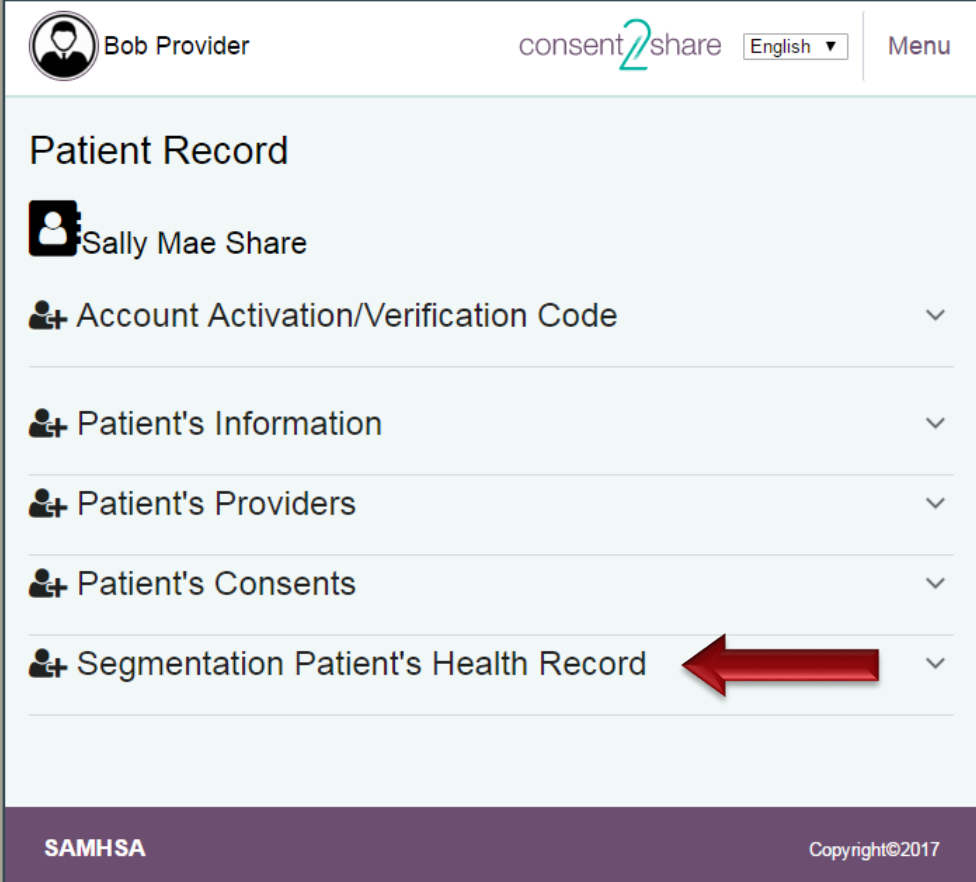
Contact Number Address

Date of Birth
Jan 1, 2017

« Previous 1 Next »

Select Document Segmentation

Select the
Segment
Patient's
Health Record
Link



The screenshot shows the user interface for 'consent2share'. At the top, it displays the user 'Bob Provider', the logo 'consent2share', a language dropdown set to 'English', and a 'Menu' button. Below this is a list of document segments under the heading 'Patient Record'. The segments are:

- 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' link. At the bottom of the interface, it shows 'SAMHSA' and 'Copyright©2017'.

Select Segmentation

Select the
Segment
Patient's
Health Record
Page

The screenshot shows the 'consent2share' web interface. At the top left, there is a user profile icon and the name 'Bob Provider'. At the top right, there is a language dropdown set to 'English' and a 'Menu' button. Below the header, there is a breadcrumb trail: '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 'Authorize Provider NPI'; 'To Disclose To:' with a text input field 'Disclose Provider NPI'; and 'Purpose Of Use:' with a dropdown menu 'Select One *'. At the bottom, there is a file upload button 'Choose File' (with 'No file chosen' text) 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. The user is logged in as 'Bob Provider'. The interface includes a header with the user profile, the application name, a language dropdown set to 'English', and a 'Menu' button. 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 an 'Authorize Provider NPI' field containing '1003235045' and the provider name 'ANESTHESIA ASSOCIATES OF LAUREL, LLC'; 'To Disclose To:' with a 'Disclose Provider NPI' field containing '1023013034' and the provider name 'BLADENSBURG VOLUNTEER FIRE DEPARTMENT & RESCUE'; and 'Purpose Of Use:' with a 'Select One *' dropdown menu currently 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 number 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.

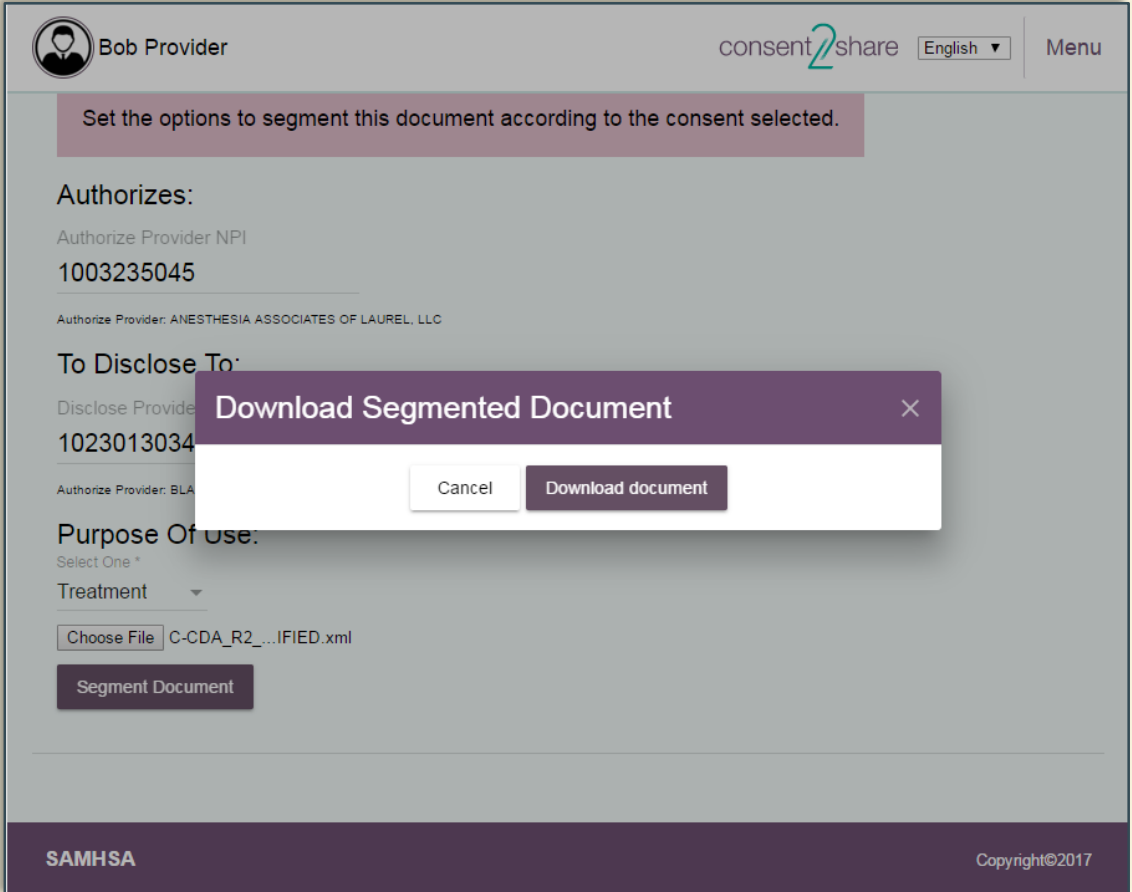
Attach Document to be Segmented

- 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'. Below this is a pink instruction box: 'Set the options to segment this document according to the consent selected.' The form includes three sections: 'Authorizes:' with 'Authorize Provider NPI' set to '1003235045' and 'Authorize Provider: ANESTHESIA ASSOCIATES OF LAUREL, LLC'; 'To Disclose To:' with 'Disclose Provider NPI' set to '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 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%

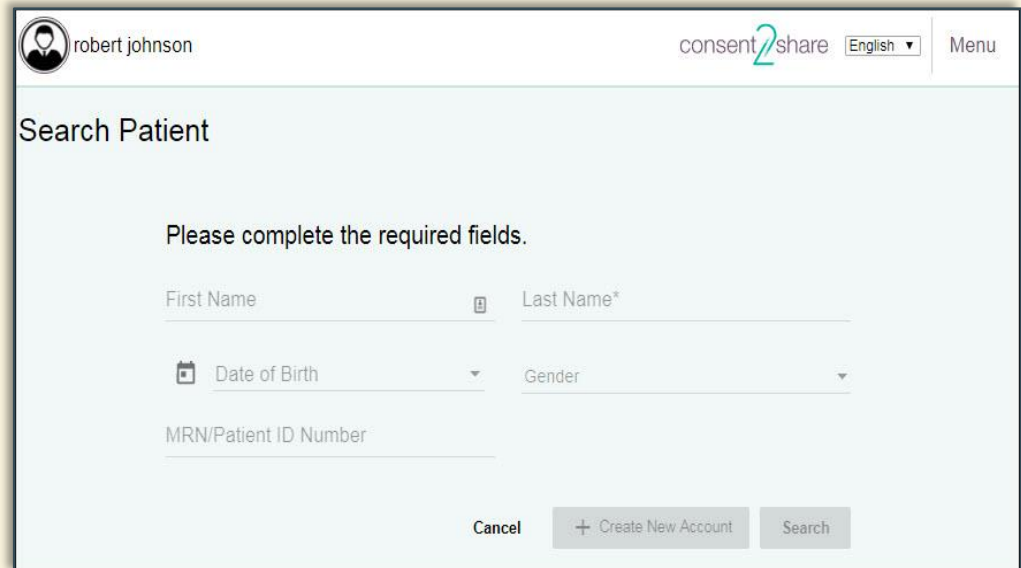
Section 7: Search for Patients

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



Search for Patients

- On the Search Patient Page, a provider must first search for a patient using the required (*) fields
- Once values are entered in the fields, click search
- A list of patients matching the required information entered will be returned below the search fields



The screenshot shows the 'Search Patient' interface. At the top, there is a user profile for 'robert johnson' and the system name 'consent2share' with a language dropdown set to 'English' and a 'Menu' button. The main heading is 'Search Patient'. Below this, a message reads 'Please complete the required fields.' The form contains several input fields: 'First Name' (with a help icon), 'Last Name*' (marked as required), 'Date of Birth' (with a calendar icon and a dropdown arrow), 'Gender' (with a dropdown arrow), and 'MRN/Patient ID Number'. At the bottom right, there are three buttons: 'Cancel', '+ Create New Account', and 'Search'.

Select Highlighted Name

- Click on the card matching the patient you searched for which will bring you to the Patient Record page
- Now you can carry out any of the tasks described above



Search Results

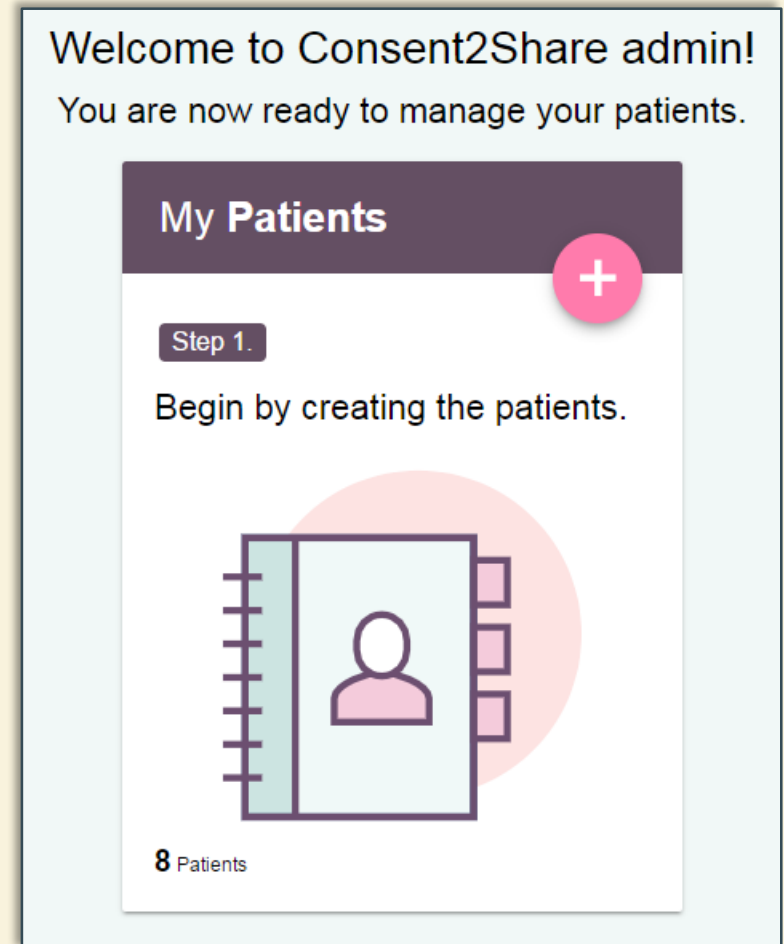
« Previous **1** Next »

 SALLY SHARE 

Contact Number	Address
Date of Birth Feb 15, 1962	807 Avenue F, Glen Burnie, MD, 21060, US

Section 8: Update Patient Information

- Consent2Share allows providers to update their patients' 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

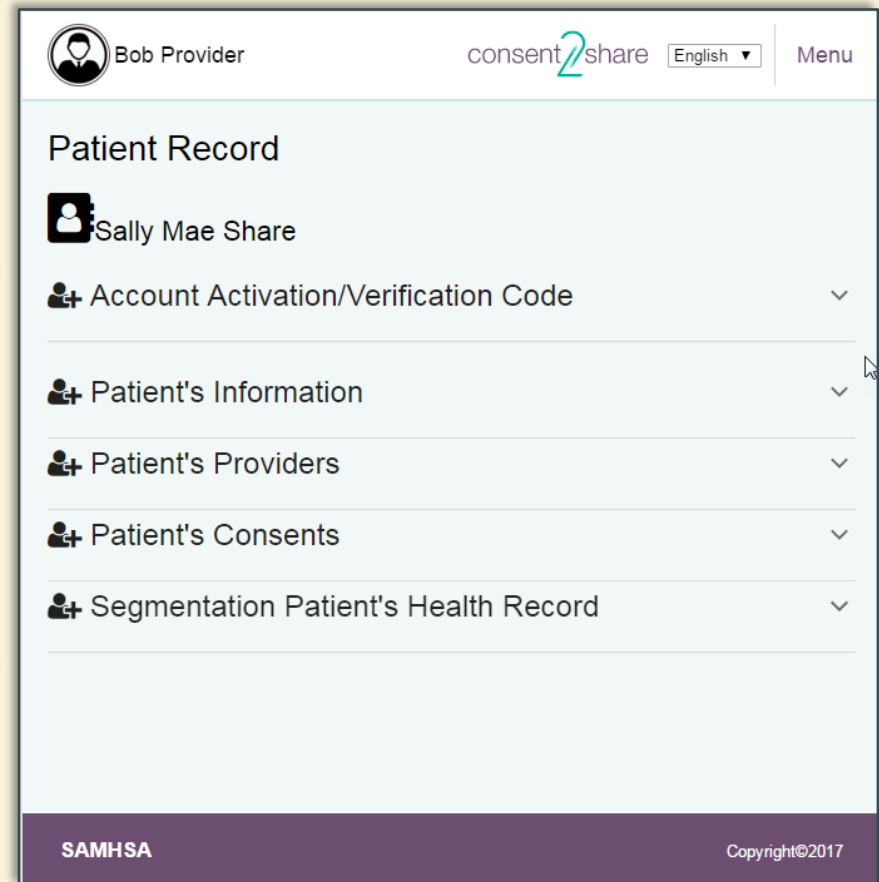
- At the Provider Page, select the appropriate Patient Card
- That will bring you to the relevant Patient Record Page

The screenshot displays the 'My Patients' section of the consent2share provider interface. At the top, the user is identified as 'Bob Provider' with a profile icon. The interface includes a search bar for 'Search by first and last name', a '+ Create a Patient Account' button, and 'Show List by' options with icons for a group and an individual. A pagination bar shows '« Previous 1 Next »'. Two patient cards are visible, each with a red edit icon:

- DEMO PATIENT**
Contact Number Address
Date of Birth
Jun 1, 2017
- SALLY SHARE**
Contact Number Address
Date of Birth
Jun 1, 2017

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



Section 9: View Consent Activity History

- Consent2Share allows patients and providers to view their consent activity history including:
 - ✓ The date a consent was created, edited, signed, revoked, or deleted
 - ✓ View the name and role of the person who performed the activities
 - ✓ View the timestamp and consent reference ID

robert johnson consent2share [English] Menu

Patient Record

Sally Share

- Account Activation / Verification Code
- Patient's Information
- Patient's Providers
- Patient's Consents
- Segment Patient's Health Record
- Activity History

Activity History

« Previous 1 Next »

Date	Action	Consent Reference ID	Changed By	Role
08/07/2017 15:00:24	Signed Consent	dgTe1TUjFT	Sally Share	Patient
08/07/2017 14:58:15	Edited Consent	dgTe1TUjFT	Sally Share	Patient
08/03/2017 14:23:24	Created Consent	dgTe1TUjFT	robert johnson	Provider
08/03/2017 13:32:59	Deleted Consent	756od3aU5E	robert johnson	Provider
08/03/2017 13:32:55	Deleted Consent	9hd9bhHXGx	robert johnson	Provider
08/01/2017 09:24:35	Created Consent	9hd9bhHXGx	Sally Share	Patient
08/01/2017 09:03:41	Created Consent	756od3aU5E	Sally Share	Patient

View Consent Activity History: Provider



- Provider:
 - ✓ First, log into the Provider Portal using your provider credentials
 - ✓ Next, click the View Patient List card
 - ✓ That will open the list of patients for that provider
 - ✓ Click on the patient card of the patient whose consent activity is to be viewed
 - ✓ Finally, click on Activity History in the Patient Record page
 - ✓ The Activity History section in the accordion opens and displays the patient consent activity history

View Consent Activity History: Patient

- Patient:
 - ✓ First, log into the Patient Portal using patient's credentials
 - ✓ Next, click on Activity History in the drop-down of the main menu
 - ✓ The Activity History section in the accordion opens and displays the patient consent activity history

