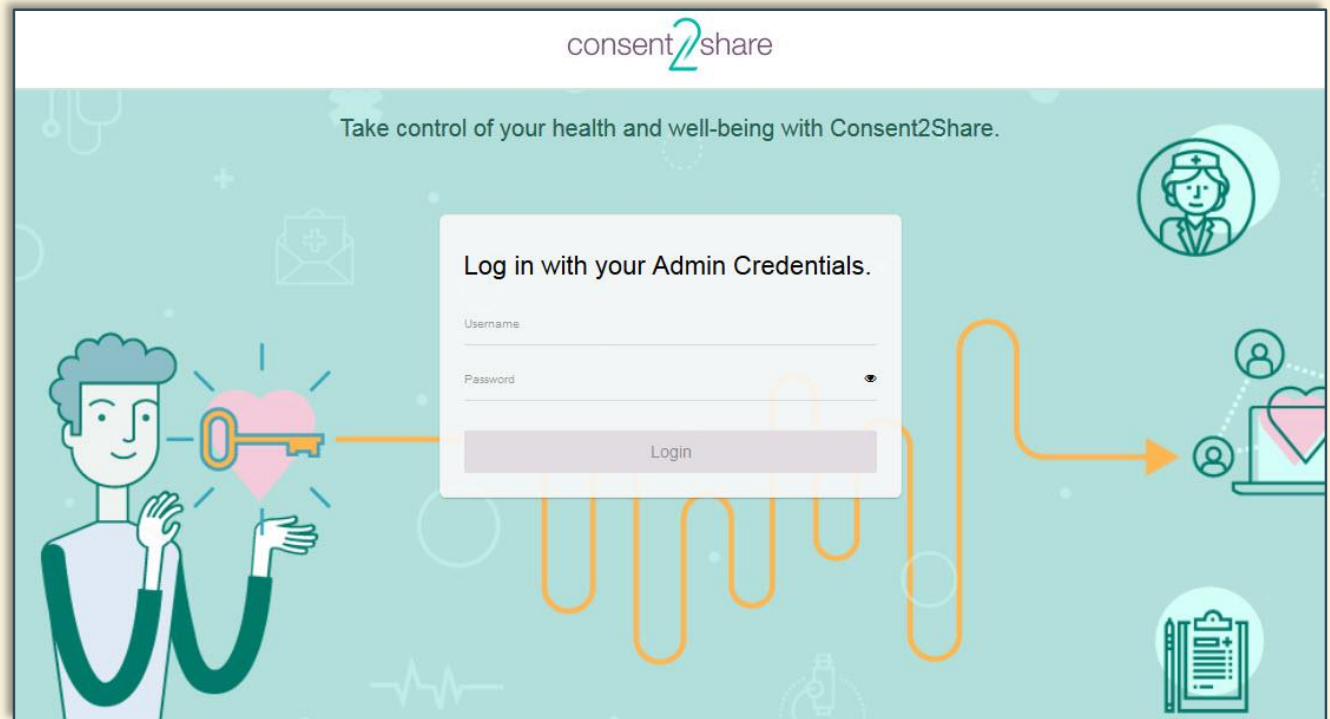



Consent2Share V3.4.0 Staff User Guide




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

About This Admin User Guide

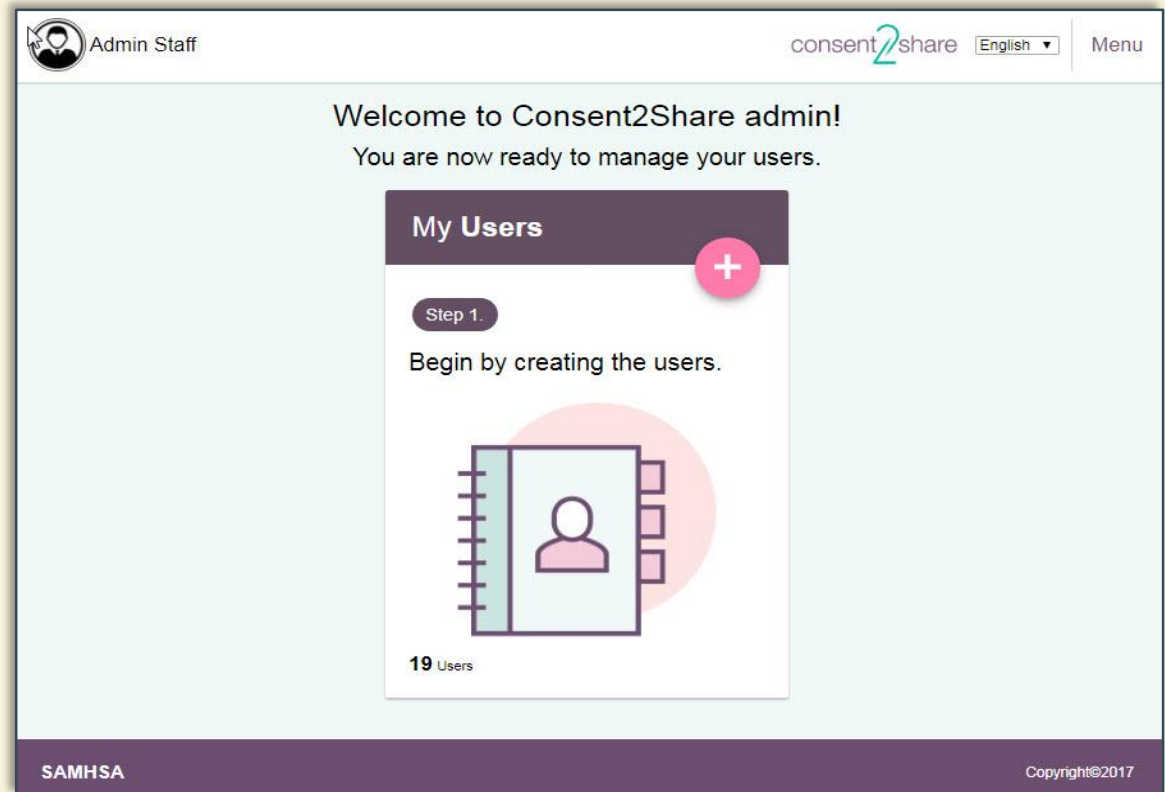


This Admin User Guide will show you how to:

1. Select the preferred language between English and Spanish
2. Create a patient account
3. Collect patient demographics
4. Update a patient account
5. Send a Activation Email and a Verification Code so patients can activate their patient accounts
6. Search for patients and update their information

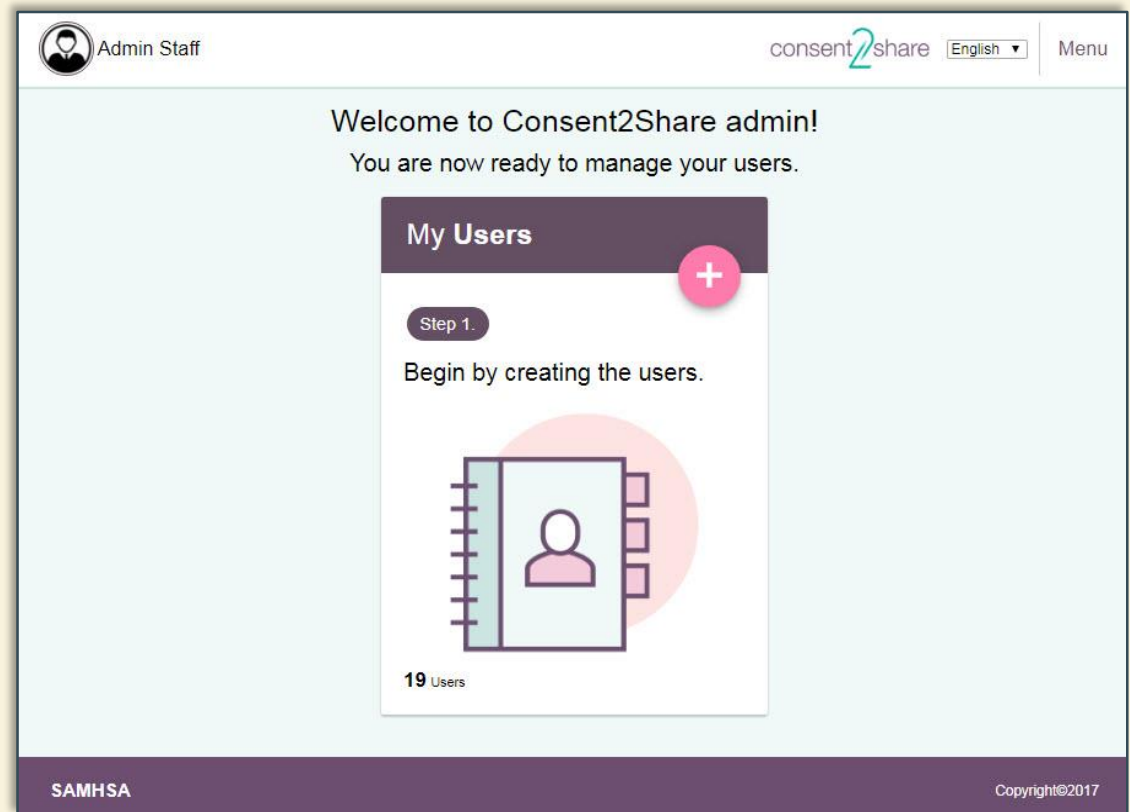
Section 1: Select Preferred Language

- Login to the Consent2Share Admin Portal with your credentials
- Select the language of your choice by clicking the Select Language dropdown



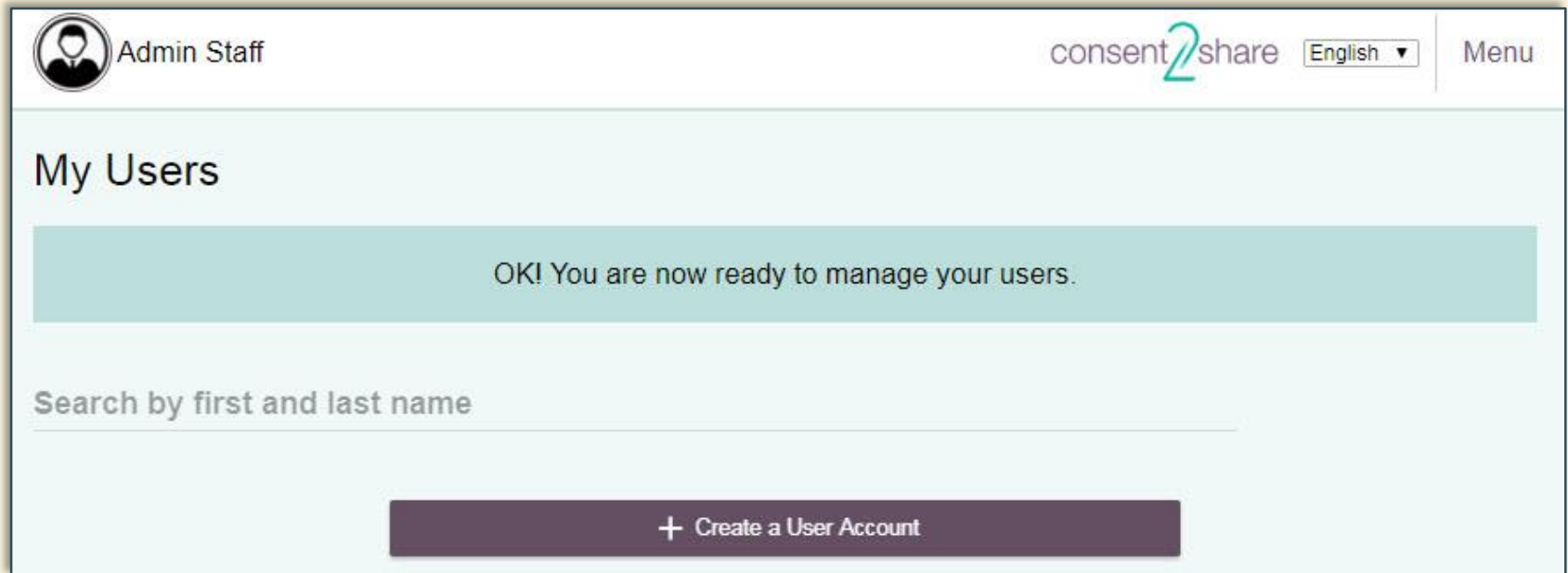
Section 2: Create a Patient Account

- On the My Users card, click on the “+” button
- This will bring you to the My Users Page



Create a Patient Account

- Click the “+ Create a User Account” button on the Home Page



- This will bring you to the Patients Demographics Page shown on the following slide

Patient Demographics Page

Admin Staff consent2share English Menu

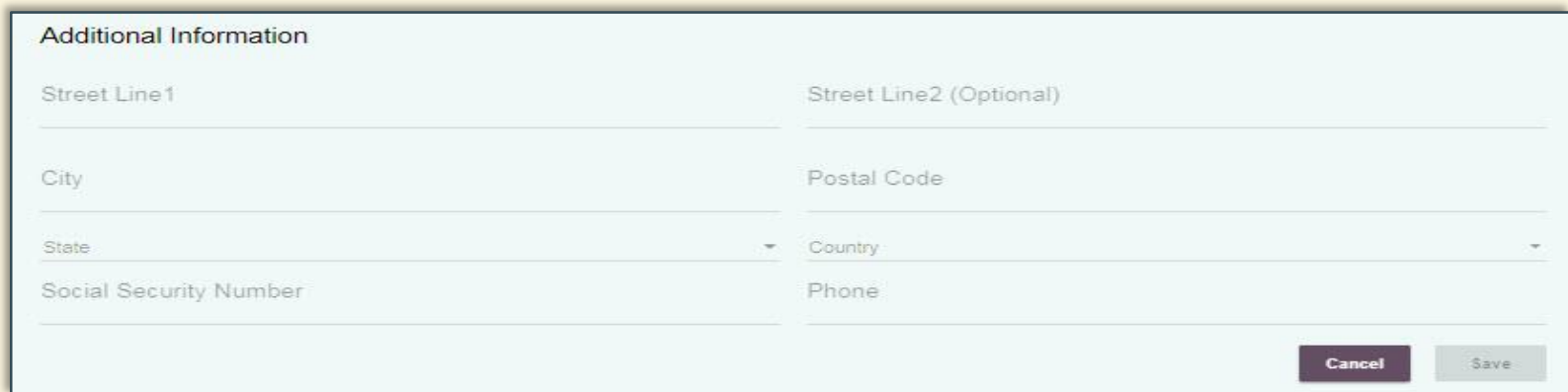
Create User

Please complete all required fields to create a User Account.

Required Information	
Role Patient	Preferred Language English
First Name <small>This field is required.</small>	Middle Name (Optional)
Last Name	Email
Registration Purpose Email(Optional)	
Gender	Date of Birth <small>This field is required.</small>
Identifier System <small>This field is required.</small>	Identifier Value
Additional Information	
Street Line 1	Street Line2 (Optional)
City	Postal Code
State	Country
Social Security Number	Phone

Section 3: Collect User Demographics

- Enter information for the required fields (first name, last name, email, gender, and date of birth)
- Either enter the details in the Additional Information section now or leave it for later
- When finished entering information, click Create Patient



The screenshot shows a form titled "Additional Information" with the following fields:

Street Line 1	Street Line 2 (Optional)
City	Postal Code
State	Country
Social Security Number	Phone

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

Section 4: Update Patient Information



- You can return to a patient's Profile Page and enter information that was not previously entered
- You can return to a patient's Profile Page and modify information that changed since the account was created
- You will see that the Create Patient button on the Patient Profile Page is replaced by an Update Patient button
- This button becomes active when information is edited or when new information is added to the patient profile page

Update Patient Information

The screenshot shows a web application interface for updating patient information. The interface includes a sidebar with a user profile and a 'Home' link. The main content area contains a form with the following fields:

- First Name ***: Simple
- Last Name ***: Dude
- Email ***: SimpleDude@mailinator.com
- Gender ***: Male, Female
- Date of Birth ***: 01/01/2001

Below these fields is a section titled **Additional Information** with the following fields:

- SSN**: Social security number
- Telephone**: Telephone
- Address**: Address
- City**: City
- State**: -- choose state --
- Zipcode**: Zipcode

At the bottom of the form are two buttons: **Cancel** and **Update Patient**. A large red arrow points to the **Update Patient** button.

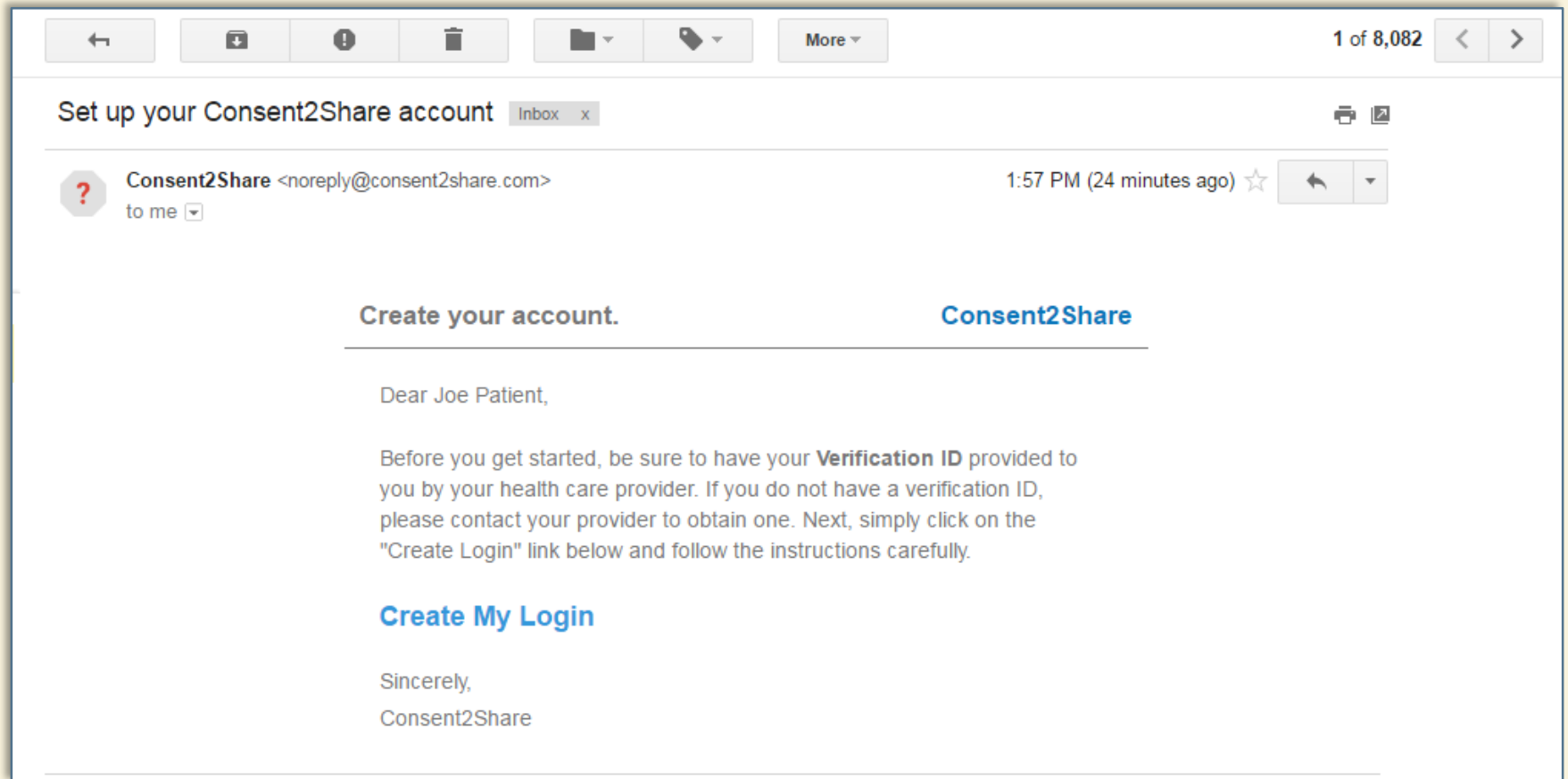
Section 5: Activate Patient Account

- Once the patient account is created, an activation email must be sent to the patient's email address.
- Click the Send Email button, and select the language of your choice. The email will be sent in the selected language.
- The email will contain a link to Consent2Share for the patient to complete the registration (See sample on next page)
- When you click the Send Email button, an alphanumeric Validation Code is generated. Email the code to the patient in a separate email. (See sample below)
- Once done, patients can create their login.

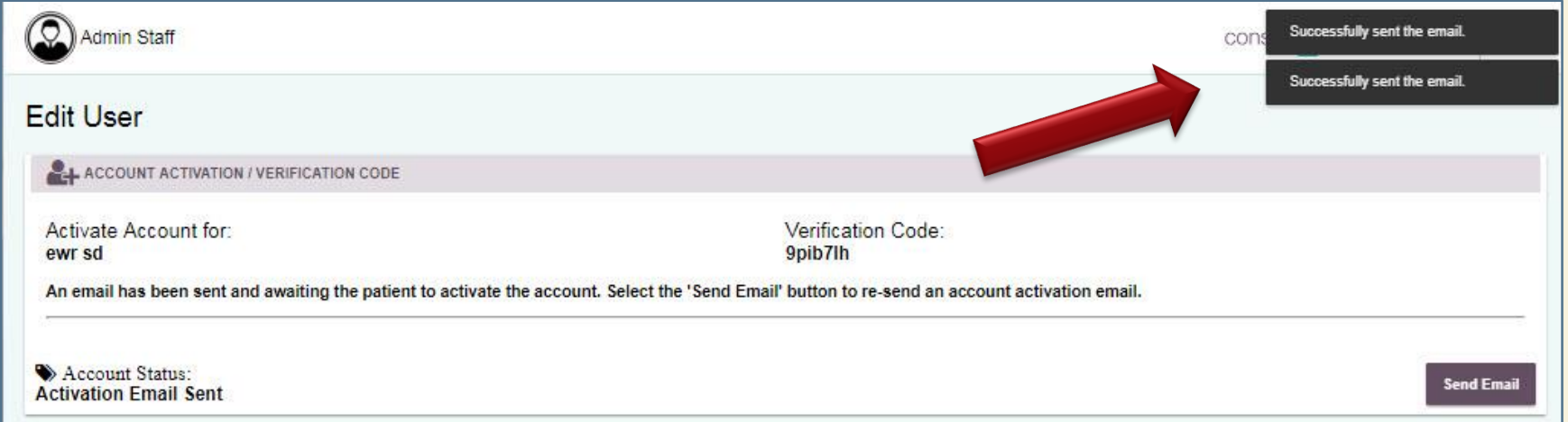
Verification Code:

j43a6s0

Activation Email



Send Activation Email to the Patient

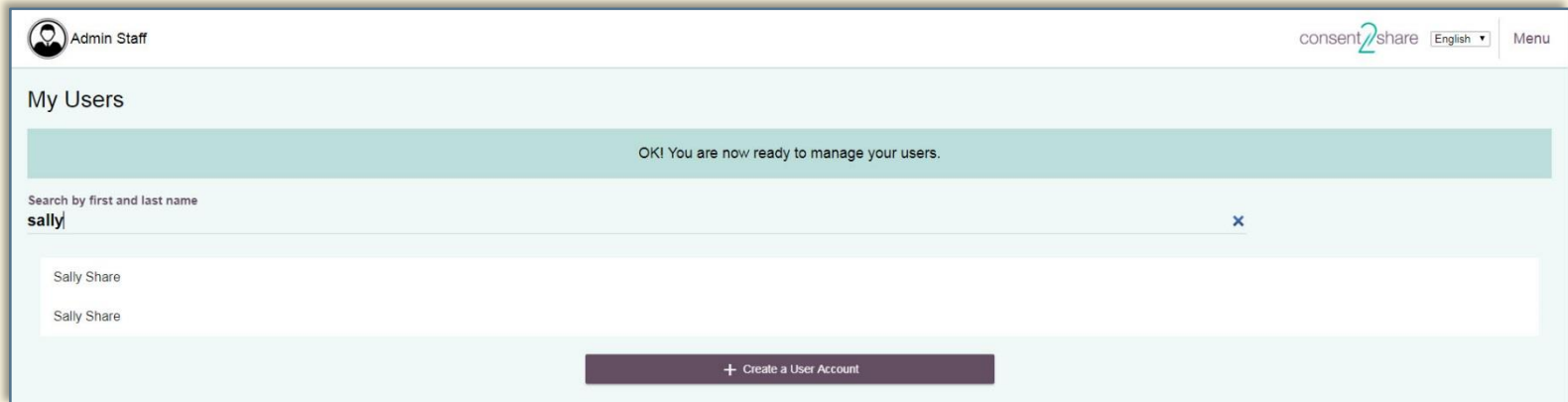


The screenshot shows a web interface for managing users. At the top left, there is a user profile icon and the text "Admin Staff". Below this is the "Edit User" section. A red arrow points from the "Edit User" section towards the top right corner of the interface. In the top right corner, there are two dark grey pop-up windows, each containing the text "Successfully sent the email." Below the "Edit User" section, there is a tab labeled "ACCOUNT ACTIVATION / VERIFICATION CODE". Under this tab, the text reads: "Activate Account for: ewr sd" and "Verification Code: 9pib7lh". Below this, 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 left, there is a section for "Account Status:" which shows "Activation Email Sent". At the bottom right, there is a purple button labeled "Send Email".

- After you send the activation email to the patient you will see an “email sent successfully” pop-up window at the top

Section 6: Search Users

- Consent2Share includes a patient search feature.
- Log into the Admin Portal using your provider credentials.



- Begin typing the user's name in the input field. If the input matches a user's name from the database, the dropdown box will contain all the names that matches the input.
- Clicking on a user's name from the results takes the control to the Edit User page.