Consent Tool User Guide

Purpose of the Consent Tool

The CRISP DC Consent Tool allows providers and staff to document patient consent for sharing protected health information through the Health Information Exchange (HIE). For patients providing a 42 CFR Part 2 consent, this authorizes their Substance Use Disorder (SUD) treatment provider to share information related to their SUD treatment with the DC HIE, where it can be accessed by other participating members of the patient's care team across CRISP-affiliated HIE networks. The tool also supports other consent scenarios that require patients to opt in to the sharing of specific types of health information.

Capturing Consent at In-Person Visit

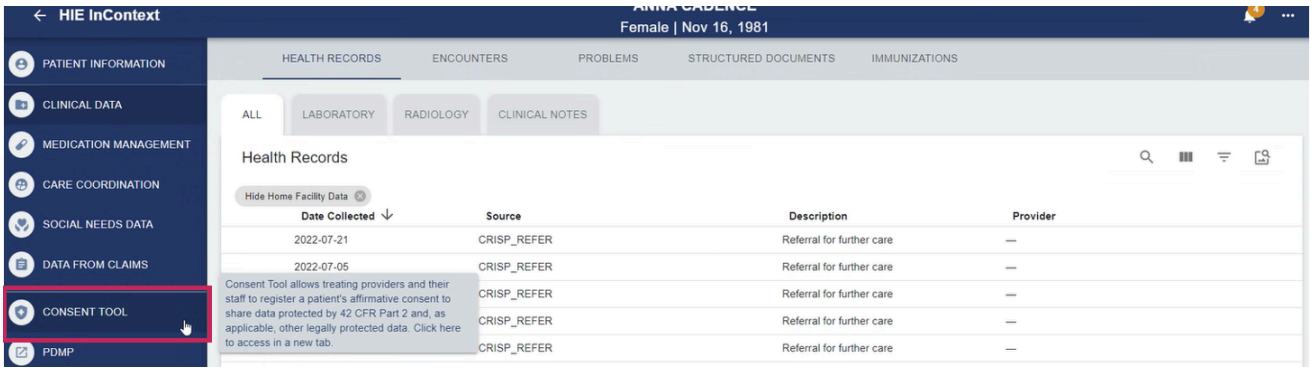
The provider searches for the patient in the DC Portal or launches the Consent Tool through single sign-on (SSO) from the EHR. Once the tool is open, the provider reviews the consent with the patient, explaining what information will be shared and who will have access to it. If the patient chooses to share all Substance Use Disorder (SUD) treatment data, the patient or parent/guardian signs the consent directly within the tool during the in-person visit. The provider then completes the required legal attestations, enters their name, and submits the consent.

Capturing Consent with the Paper Form

During the appointment, the patient will complete the paper version of the Consent Form. Once that is executed, a credentialed staff member may complete the patient's registration in the Consent Tool based on the patient's designation and select the "Attestation for Consent on File" checkbox in the signature section.

A signed copy of the consent form must be retained on file, as federal law requires patient authorization before Substance Use Disorder (SUD) information can be shared. The signed consent must be available upon request.

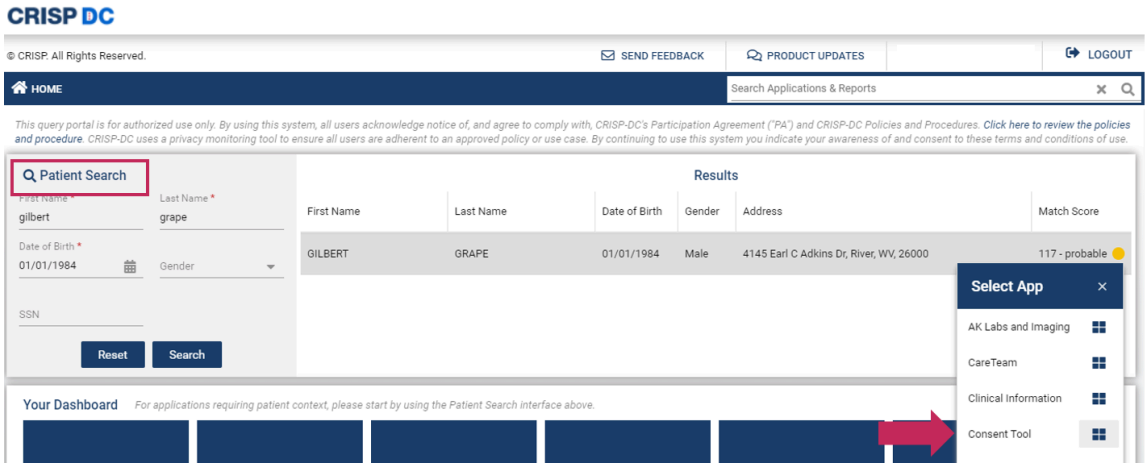
Launching the Consent Tool
via the InContext App in your EHR



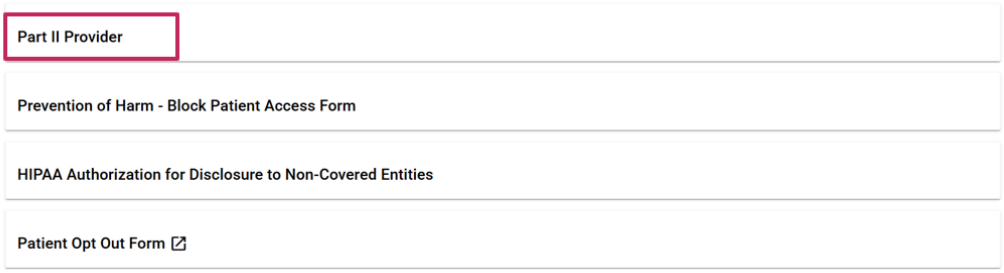
1. Click on the consent tool tab on the left-hand side of your screen.
2. The tool will launch a new window.

Consent Tool User Guide

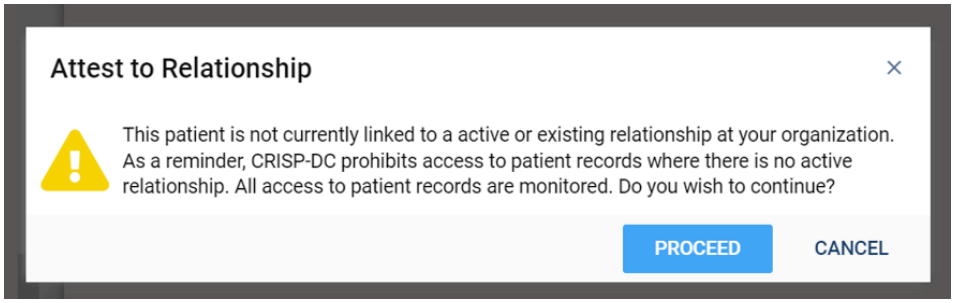
Launching the Consent Tool via the Web-Based Portal

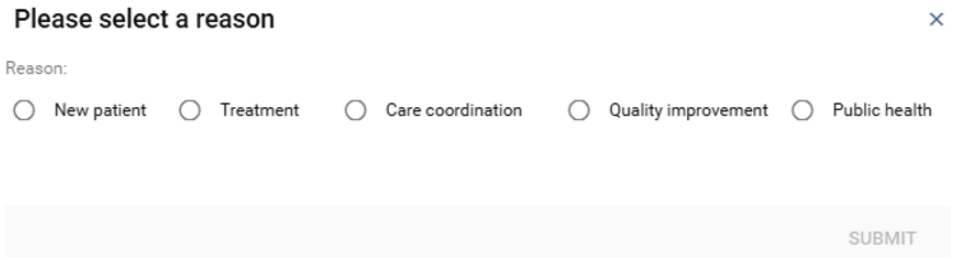


1. Enter your patient name and date of birth in the patient search.
2. Select the patient from search results, and choose Consent Tool.

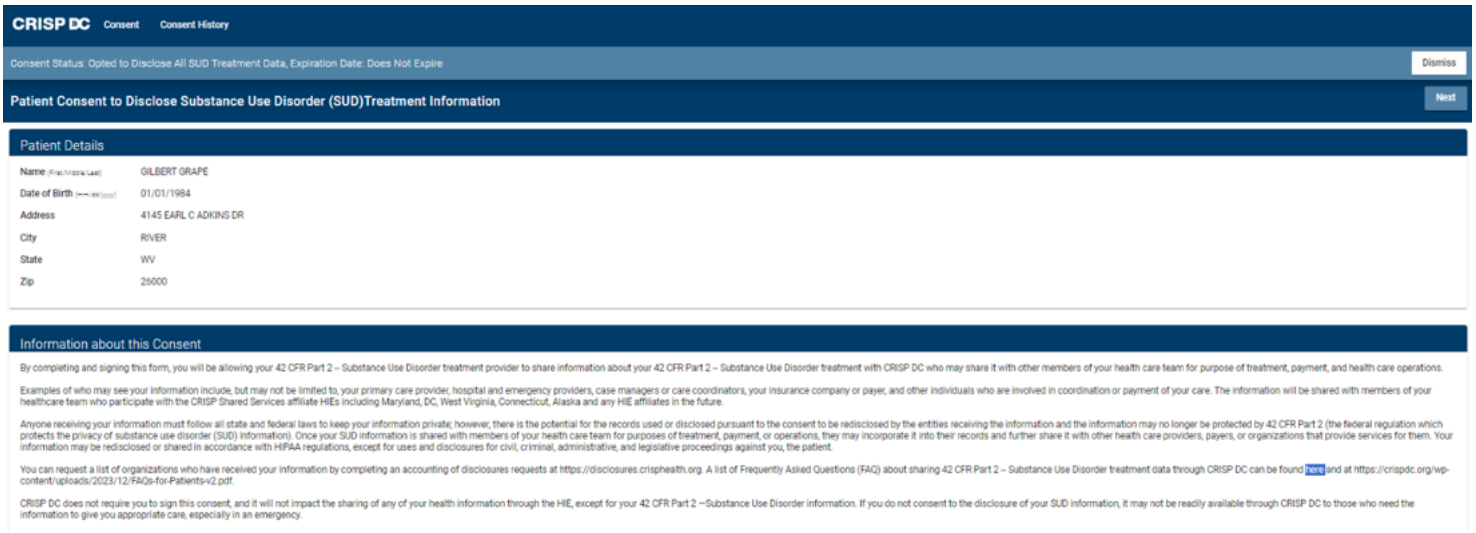


3. Choose the Part II Provider form.
   a. If you are registering consent for a new patient (one not currently on your existing CRISP panel), a “Attest to Relationship” prompt will appear. Click 'Proceed' to continue.
   b. Next, you must select a reason for searching the patient. Please select the option that applies to you.

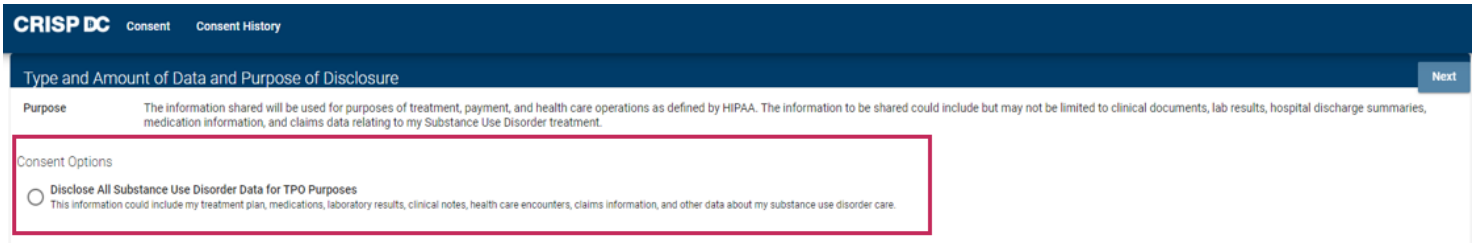




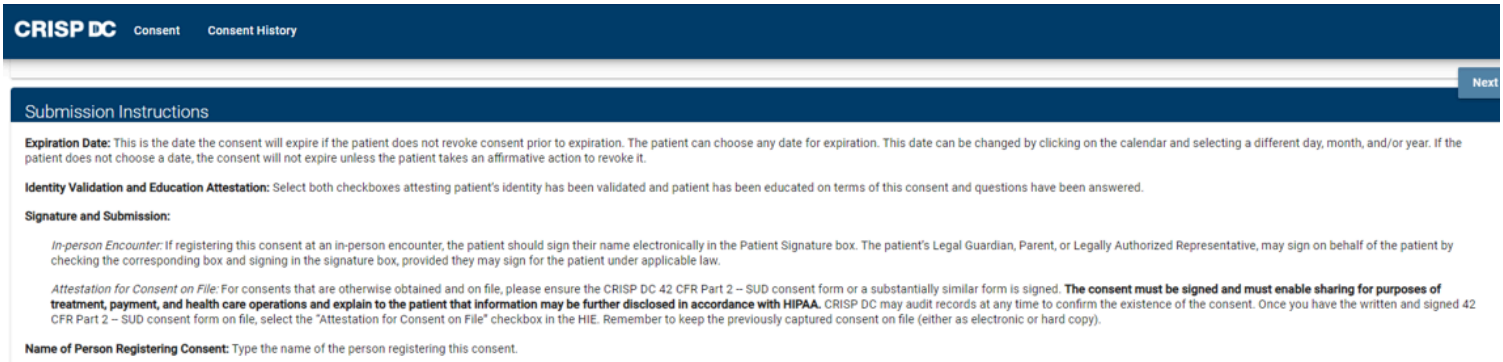
Consent Tool User Guide



4. Review the Information section with patient, using the Accounting of Disclosures and FAQ links as needed.

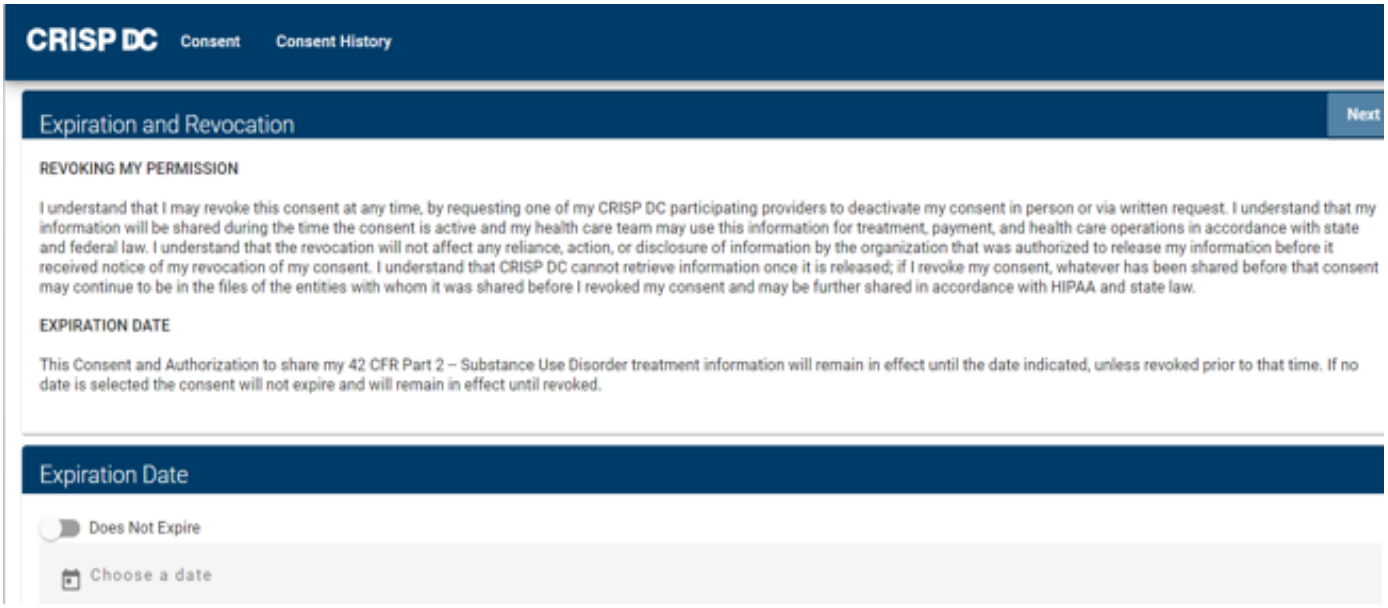


5. Select consent option to disclose all substance use disorder data for TPO purposes. Please note patients must elect to share ALL SUD information with this form.

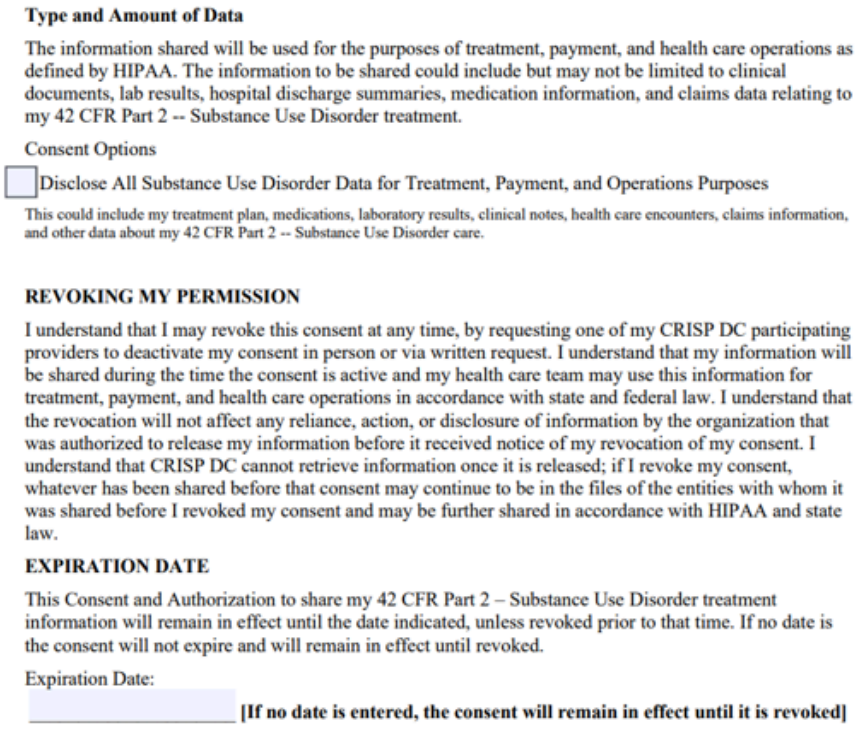


6. Review Submission Instructions section.
   a. For paper consents or consents that are otherwise obtained and on file, please make sure to have the CRISP 42 CFR Part 2 SUD Consent Form (or a substantially similar form) signed and completed by the patient before attesting to having the consent on file in the tool.

Consent Tool User Guide



7. Review the Expiration/Revocation sections.
   a. Discuss the Revocation section with the patient and explain that consent may be revoked at any time.
   b. By default, the expiration date is set to "Does Not Expire."
   c. If the patient would like the consent to expire on a specific date, deselect "Does Not Expire" and use the calendar icon to select the desired expiration date.
   d. For paper consents, update the expiration date to match the date indicated on the signed SUD Consent Form.
   e. For in-person visits, the expiration date may be set to any future date based on the patient's preferences and discussion with the provider.



Type and Amount of Data

The information shared will be used for the purposes of treatment, payment, and health care operations as defined by HIPAA. The information to be shared could include but may not be limited to clinical documents, lab results, hospital discharge summaries, medication information, and claims data relating to my 42 CFR Part 2 -- Substance Use Disorder treatment.

Consent Options

☐ Disclose All Substance Use Disorder Data for Treatment, Payment, and Operations Purposes

This could include my treatment plan, medications, laboratory results, clinical notes, health care encounters, claims information, and other data about my 42 CFR Part 2 -- Substance Use Disorder care.

REVOKING MY PERMISSION

I understand that I may revoke this consent at any time, by requesting one of my CRISP DC participating providers to deactivate my consent in person or via written request. I understand that my information will be shared during the time the consent is active and my health care team may use this information for treatment, payment, and health care operations in accordance with state and federal law. I understand that the revocation will not affect any reliance, action, or disclosure of information by the organization that was authorized to release my information before it received notice of my revocation of my consent. I understand that CRISP DC cannot retrieve information once it is released; if I revoke my consent, whatever has been shared before that consent may continue to be in the files of the entities with whom it was shared before I revoked my consent and may be further shared in accordance with HIPAA and state law.

EXPIRATION DATE

This Consent and Authorization to share my 42 CFR Part 2 – Substance Use Disorder treatment information will remain in effect until the date indicated, unless revoked prior to that time. If no date is the consent will not expire and will remain in effect until revoked.

Expiration Date:

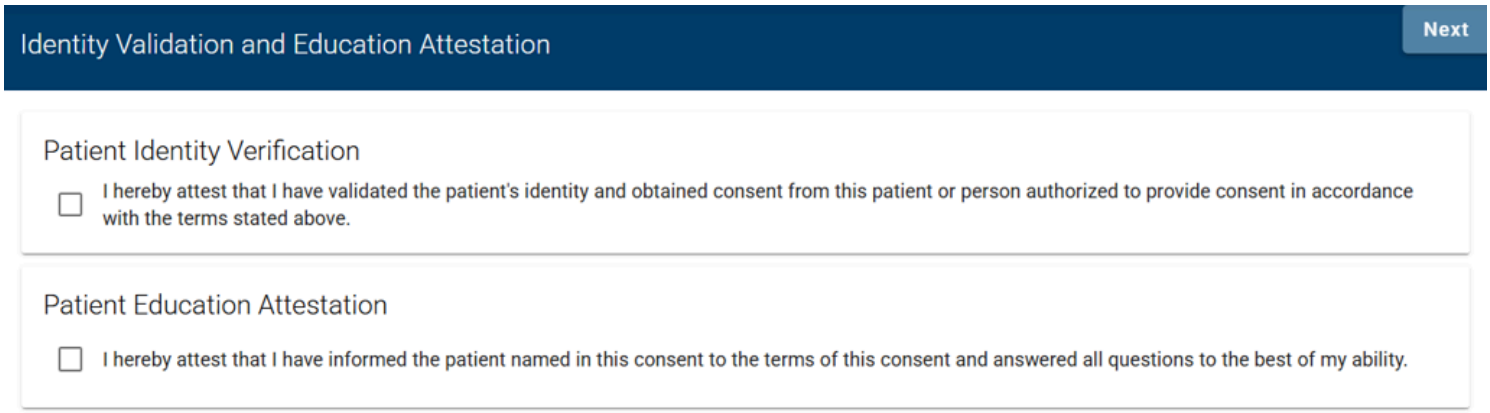
_____ **[If no date is entered, the consent will remain in effect until it is revoked]**

Consent Tool User Guide

When Registering a Consent via the Paper Form:

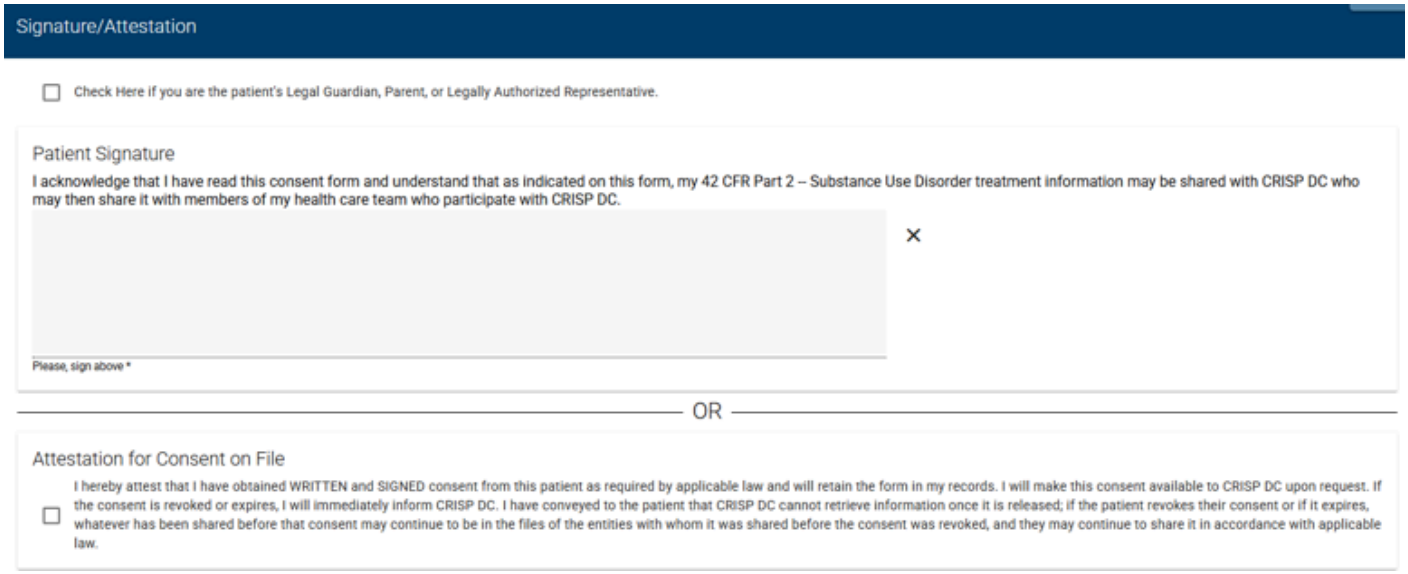
- **Important**: Patients must designate their own expiration date on the paper Consent Form. If a patient selects an expiration date, providers must ensure the date entered in the Consent Tool exactly matches the date authorized on the paper form. The online form defaults the expiration date to "Does Not Expire." If the patient chooses a specific expiration date, it must be documented both on the paper form and in the Consent Tool. If no expiration date is provided, the consent remains in effect until it is revoked.
- If any fields are left blank, the form is invalid. Providers and staff must not register the patient's consent preferences in the Consent Tool unless the form is fully completed.

The paper form is available in the resources section on the Consent page of the CRISP DC website.

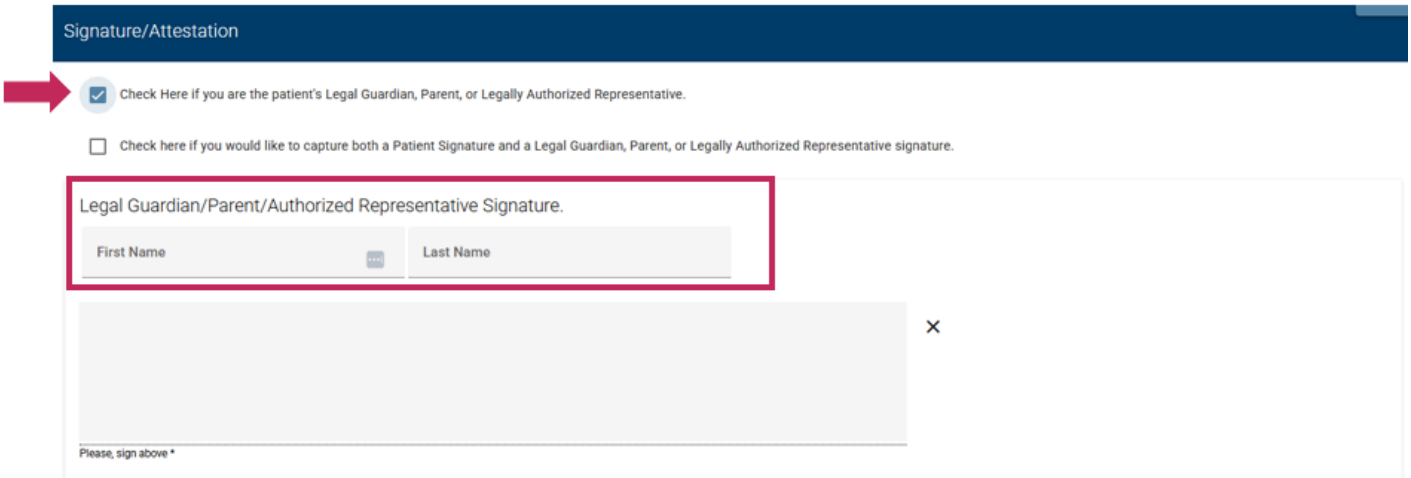


8. Complete the provider Identity Validation and Education Attestation
   a. Providers/staff obtaining patient consent **must** attest that they have:
      i. Verified the patient identity *and;*
      ii. Informed the patient of all terms of the consent.

Consent Tool User Guide

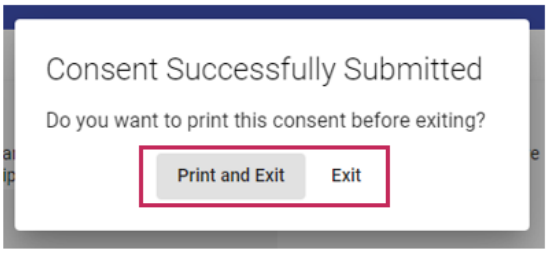


9. Complete the Signature/Attestation section
   a. **For electronic registration:**
      i. Patient enters electronic signature using a mouse, stylus pen, or finger via touchscreen/ signature pad.
   b. **For registrations of paper consents:**
      i. Check the box under "Attestation for Consent on File."
      ii. CRISP SUD Consent Form or a substantially similar form **must** be completed by the patient *before* attesting.



   c. **For a legal guardian, parent, or legally authorized representative signature (as applicable):**
      i. Checkbox only required if the person signing the consent is the patient's legal guardian, parent, or legally authorized representative.
      ii. The person signing on behalf of a patient MUST enter their name into the form and electronically sign.

Consent Tool User Guide

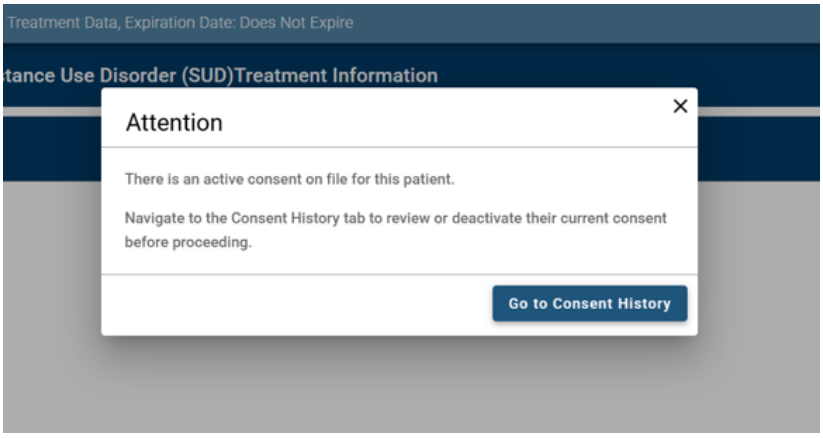


10. Submit the Consent
    a. Enter the name of the person registering this consent.
    b. Click "Submit" once – to avoid duplicate entries.
    c. Click "Print and Exit" or "Exit."

Additional Functions in the Tool

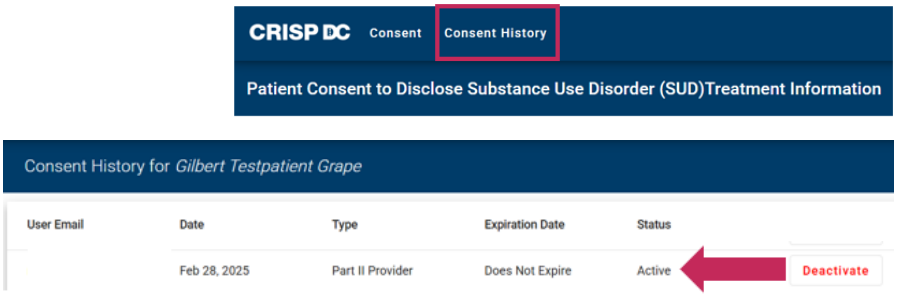
Consent on File Notification

- If a patient already has an active consent on file, a notification will appear once you click into the Part II Provider form.
- Since the patient already has an active consent form on file, another one does NOT need to be submitted, and the form will not allow you to submit another Part II consent.



Viewing Consent History

- After searching for your patient, click "Consent History."
- Click on the active consent to review the consent details.

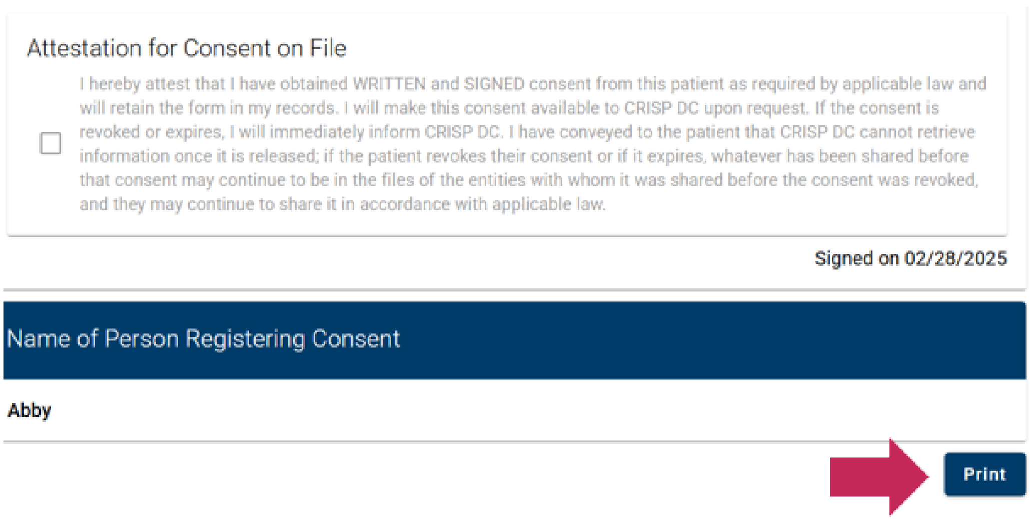


Consent Tool User Guide

How to View Patient SUD Data

- Once consent is submitted for a patient their SUD data covered by 42 CFR Part 2 will be identified within the DC HIE with a navy blue shield.
- This makes the data easily identifiable amongst other clinical data within the HIE.

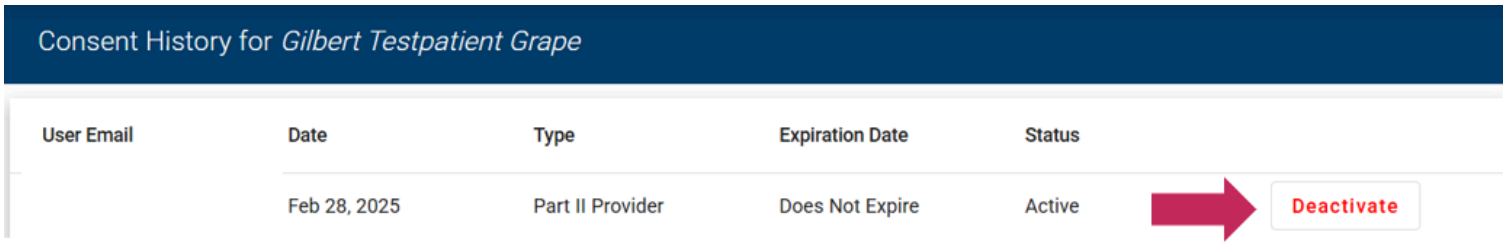
How to Print a Consent Registration



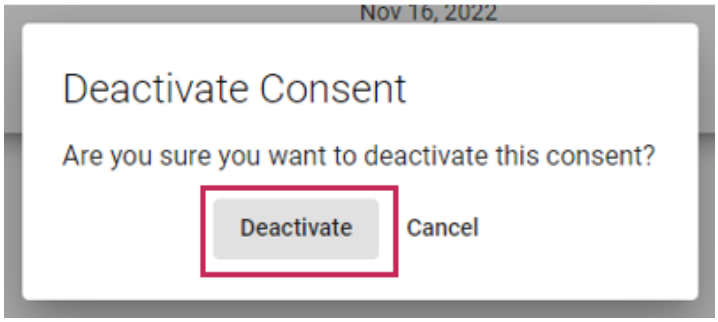
- Providers may review, print, or save a registered consent as a file.
- Search for a patient and open a record in their consent history.
- Scroll to the bottom of the window and click "Print."
- A print preview will appear where providers can make selections for how to print the file.

Consent Tool User Guide

How to Deactivate a Consent Registration



- Search for a patient and locate the "Active" record in their consent history.
- Click "Deactivate" on the record.
- Then click "Deactivate" on the prompt
- The record will no longer be viewable in the Consent History tab.



Additional Questions?

Contact Project Manager Abby Stretz via email at Abby.Stretz@crispdc.org or visit the Consent Tool landing page for additional information, training resources, and support.