Connecting Care CRISP DC

Consent Tool User Guide- Portal and SSO

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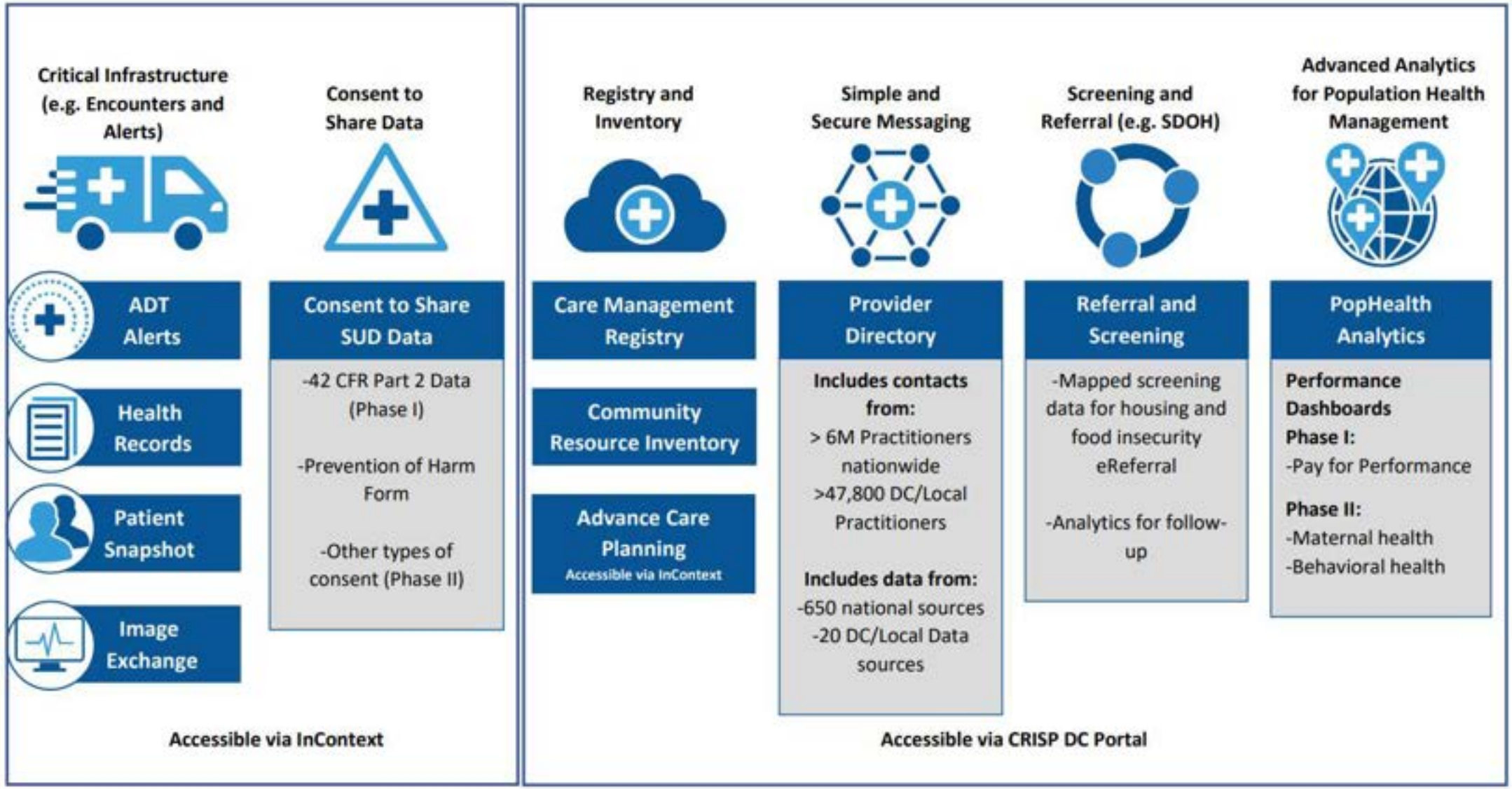
The DC HIE is a Health Data Utility with Six Core Capabilities for Providers



Consent Tool Overview

Purpose of the Consent Tool

- The CRISP Consent Tool was designed as a platform for providers and staff to register patient consents to share 42 CFR Part 2-protected data.
- This application has since grown to cover other unique scenarios where patients may need to "opt in" to sharing additional data types via the HIE
- What is my patient consenting to with a 42 CFR Part 2 consent?
  - To allow their Substance Use Disorder (SUD) treatment provider to share information about their SUD treatment with the DC Health Information Exchange (HIE).
  - The HIE will then share it with other members of the patient's health care team

    who participate with CRISP HIEs
    - Including Maryland, DC, West Virginia, Connecticut, Alaska, Virginia and any HIE affiliates in the future
- Find our complete list of FAQs here or at https://crispdc.org/wp-content/uploads/2022/04/ConsentFAQs.pdf

Registering a Consent for Telehealth Patients

Using the CRISP Consent Form for Telehealth Patients

- After the telehealth appointment has occurred, a credentialed staff member may complete the registration in the Consent Tool, based on the patient's designation, before checking the “Attestation for Consent on File” box in the signature section.
- *Please keep the signed copy of the consent form on file. It is required by federal law to have a patient signature to share the patient’s SUD information available upon request.*

Registering a Consent During In-Person Visits

Using the CRISP DC Consent Form for In-Person Visits

- Provider searches for their patient in DC Portal or through SSO in their EHR.
- After launching the tool, provider explains the consent to their patient, educating them on what data they are sharing and with whom.
- Patient designates to share "all SUD treatment data".
- Patient (or parent/guardian) signs directly in the tool during the in-person visit.
- The provider registers their own legal attestations in the tool and then adds their name before submitting the consent.

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Steps to Register a Consent

via Single Sign-On (SSO) from an EHR

Launch the Consent Tool from the InContext App in your EHR

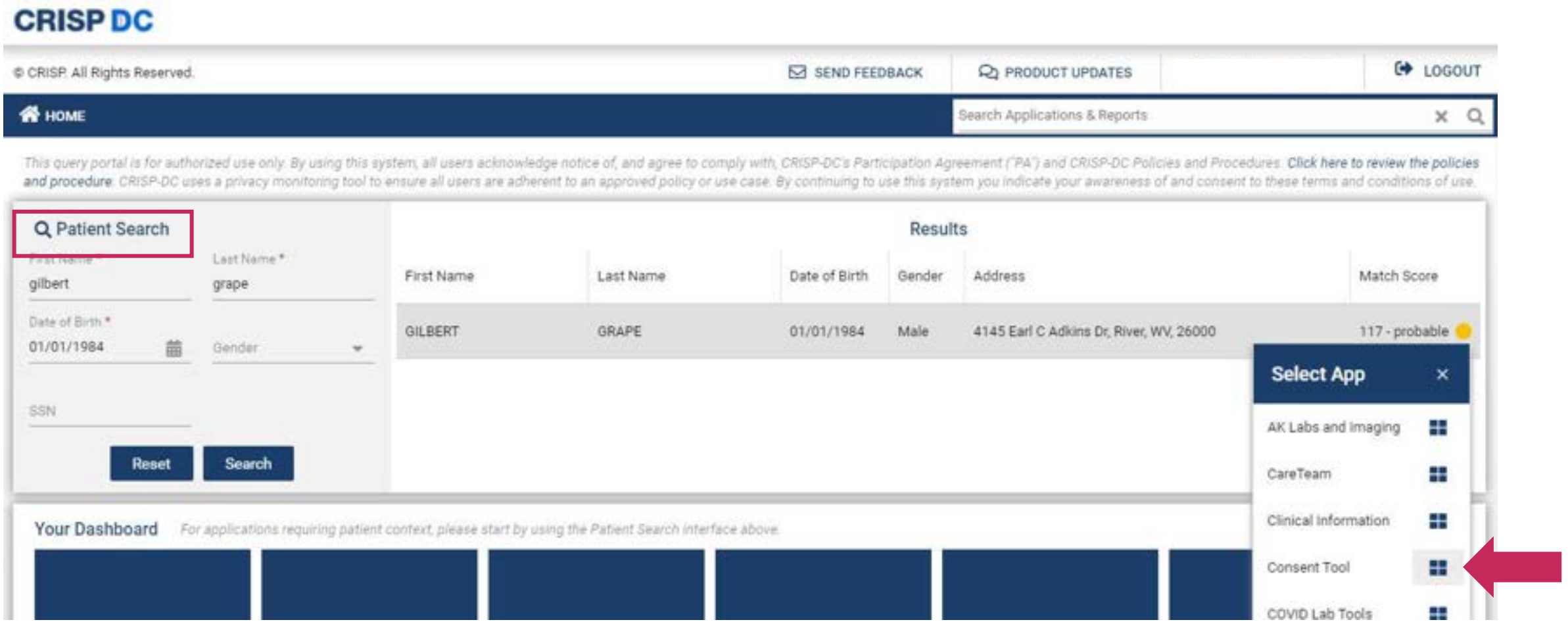
- Click on the consent tool tab on the left-hand side of your screen
- The consent tool will open in a new tab in a new window
- Follow the Portal registration instructions (on subsequent slides) to register the patient's consent the same way as you would via the DC Portal

Connecting Care CRISP DC

Steps to Register a Consent

in the DC Portal

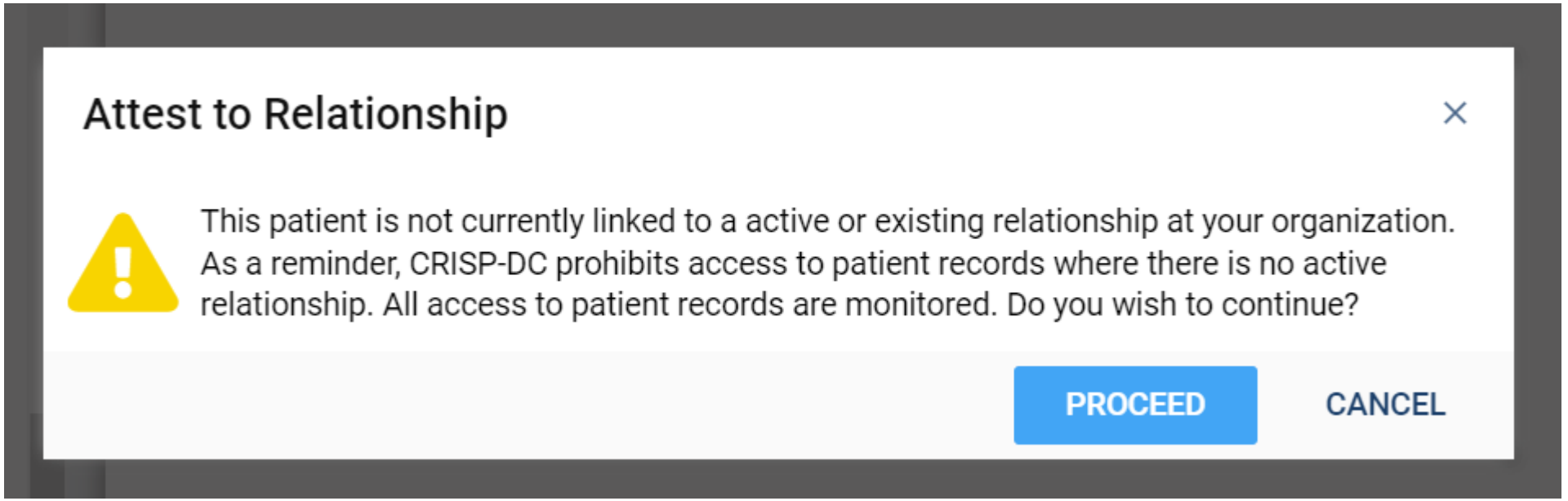
Launch the CRISP DC Portal and search for a patient



- Enter patient name and date of birth into Patient Search
- Select the patient from search results returned
- Click on the square icon next to the Consent Tool app

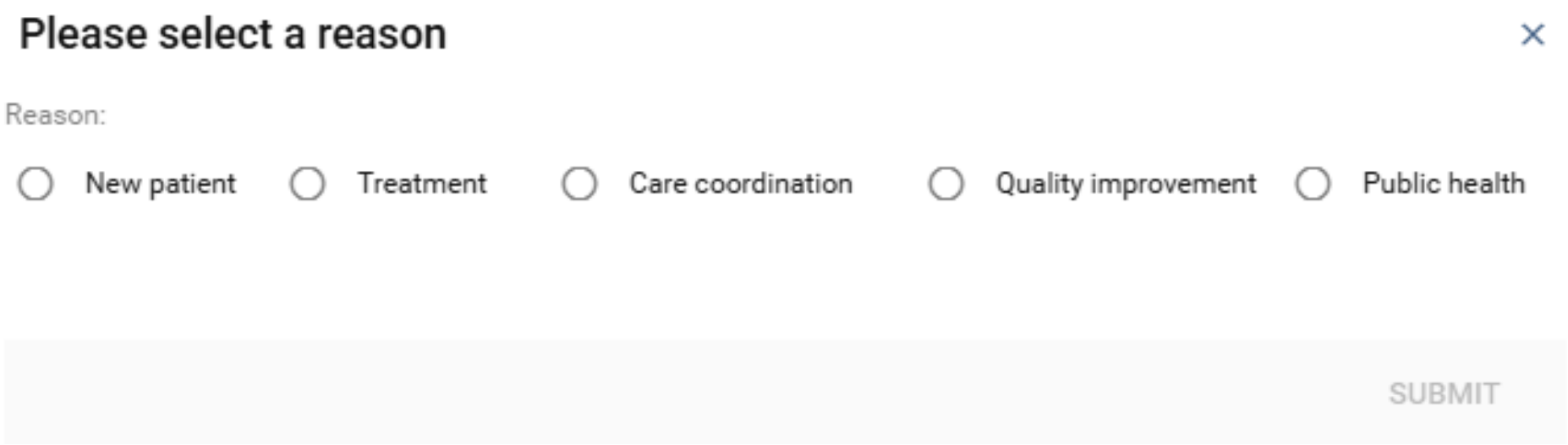
Select Part II Provider Form

Attest to Patient Relationships



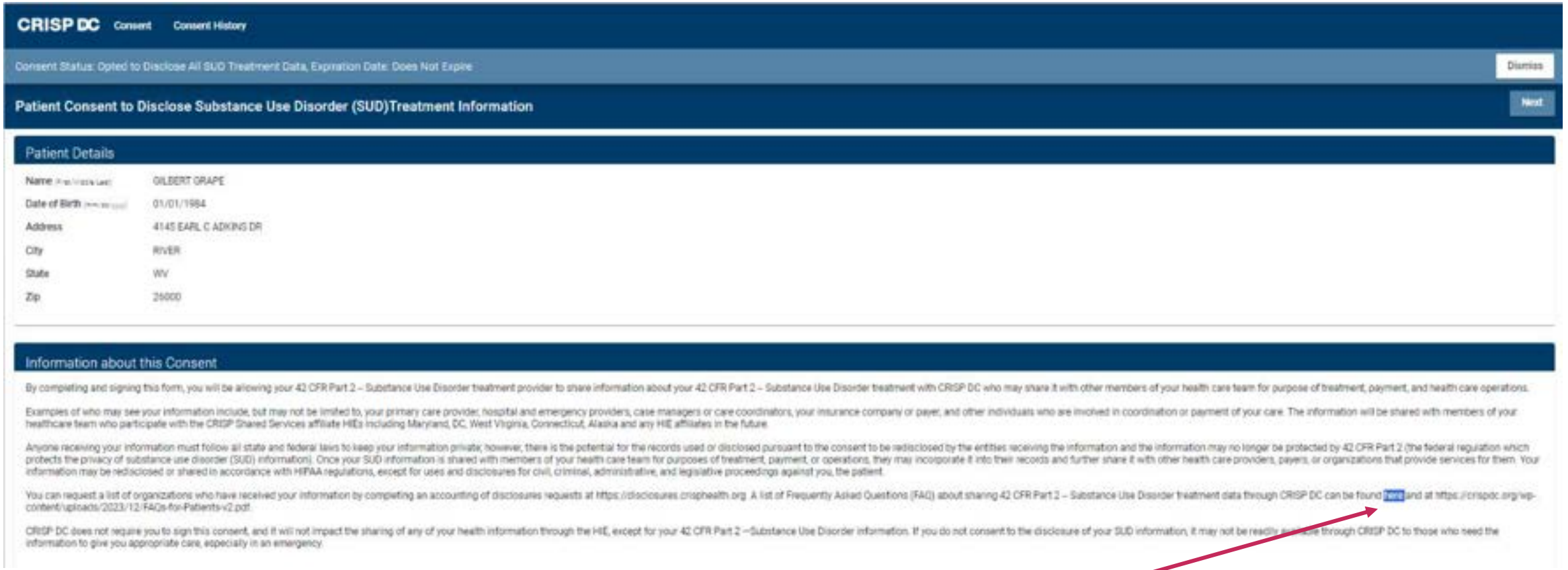
- If you are registering consent for a new patient (one not currently on your existing CRISP panel), a “Attest to Relationship” prompt will appear.
  - Click 'Proceed' to continue.

Attest to Patient Relationships



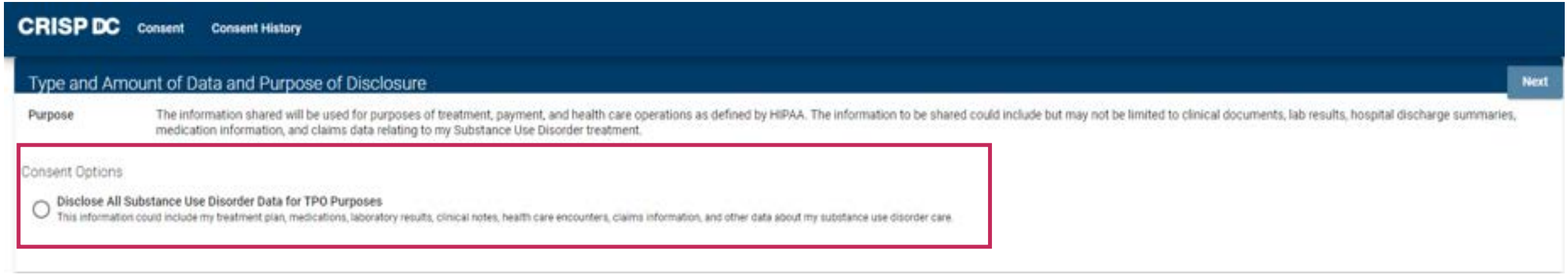
- After clicking “proceed”, you must select a reason for searching the patient. Please select the option that applies to you.

Review the Information Section with patient, using the Accounting of Disclosures and FAQ links as needed

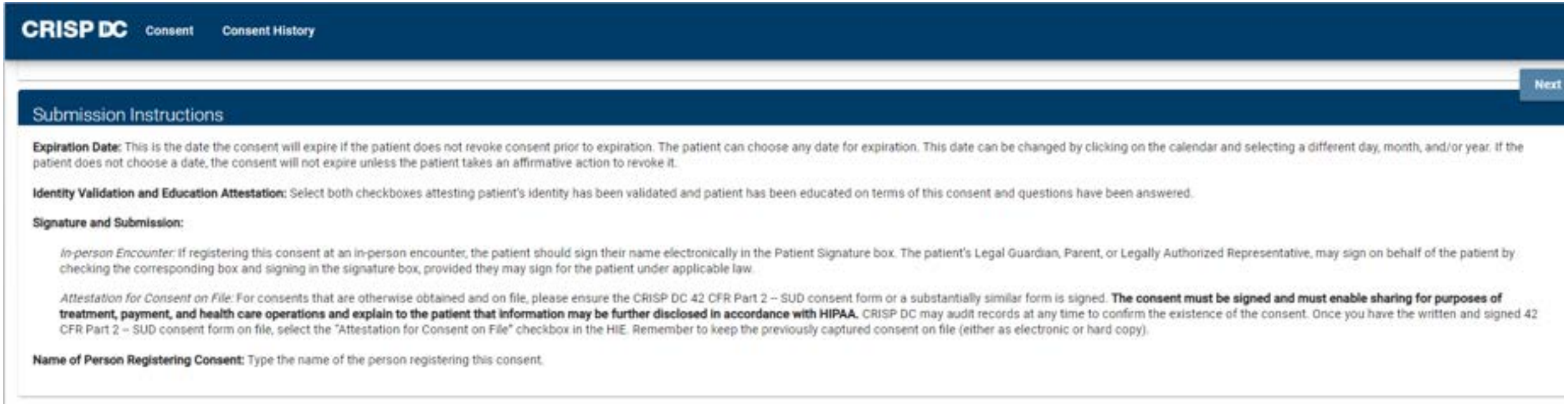


[Consent Tool - CRISP DC - DC Designated Health Information Exchange]

Patient must elect to share ALL SUD information with this form



Review Submission Instructions section



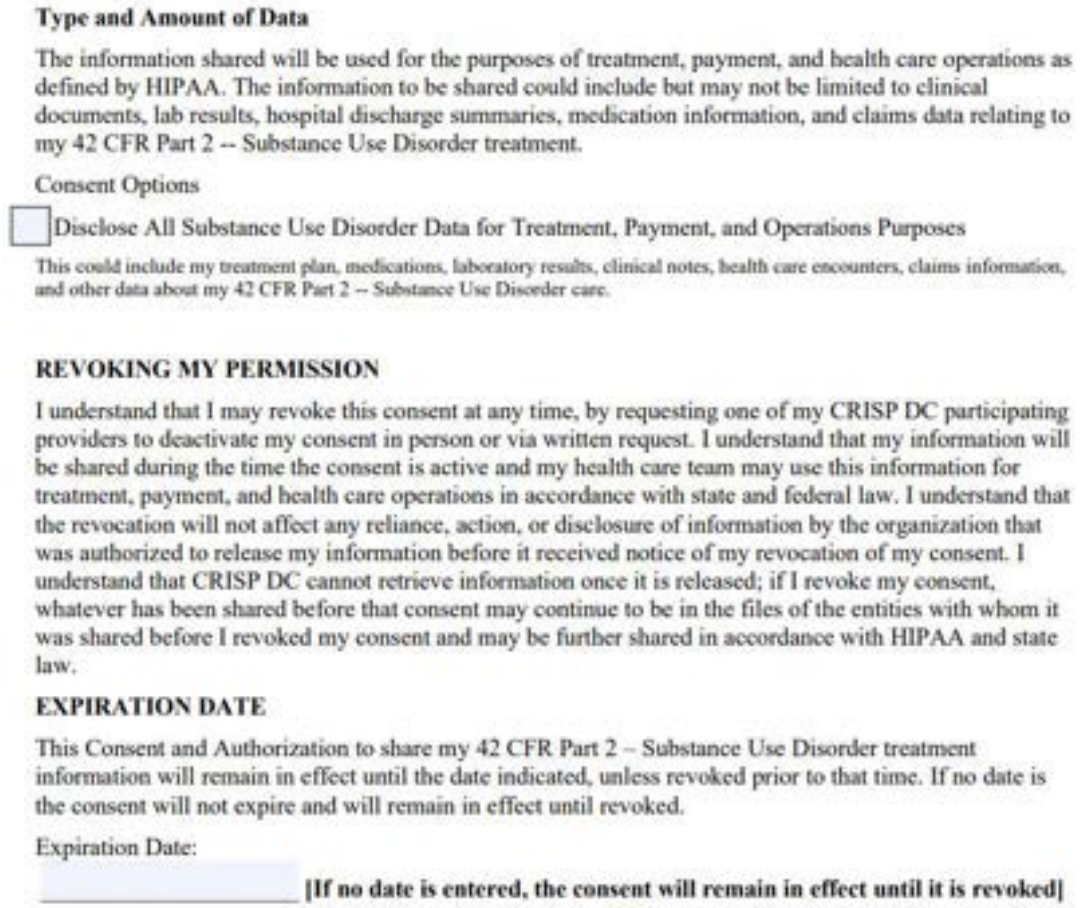
- Please review instructions for each type of visit carefully
- For telehealth visits, or consents that are otherwise obtained and on file, please make sure to have the CRISP 42 CFR Part 2 SUD Consent Form (or a substantially similar form) signed and completed by the patient before attesting to having the consent on file in the tool.

The SUD Consent Form is also available on the resources page of the CRISP DC website:

https://crispdc.org/consent

On the SUD Consent Form, a patient must designate their own expiration date for their consent

- Providers must ensure that if patients indicate a date of expiration the information that is entered in the consent tool matches what the patient has authorized on the form.
  - In the tool, the expiration date field is automatically set to “does not expire”. If the patient would like to choose a date on which their consent does expire, they may do so in the tool and on the paper form.
  - If no date is entered, the consent will remain in effect until it is revoked.



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.

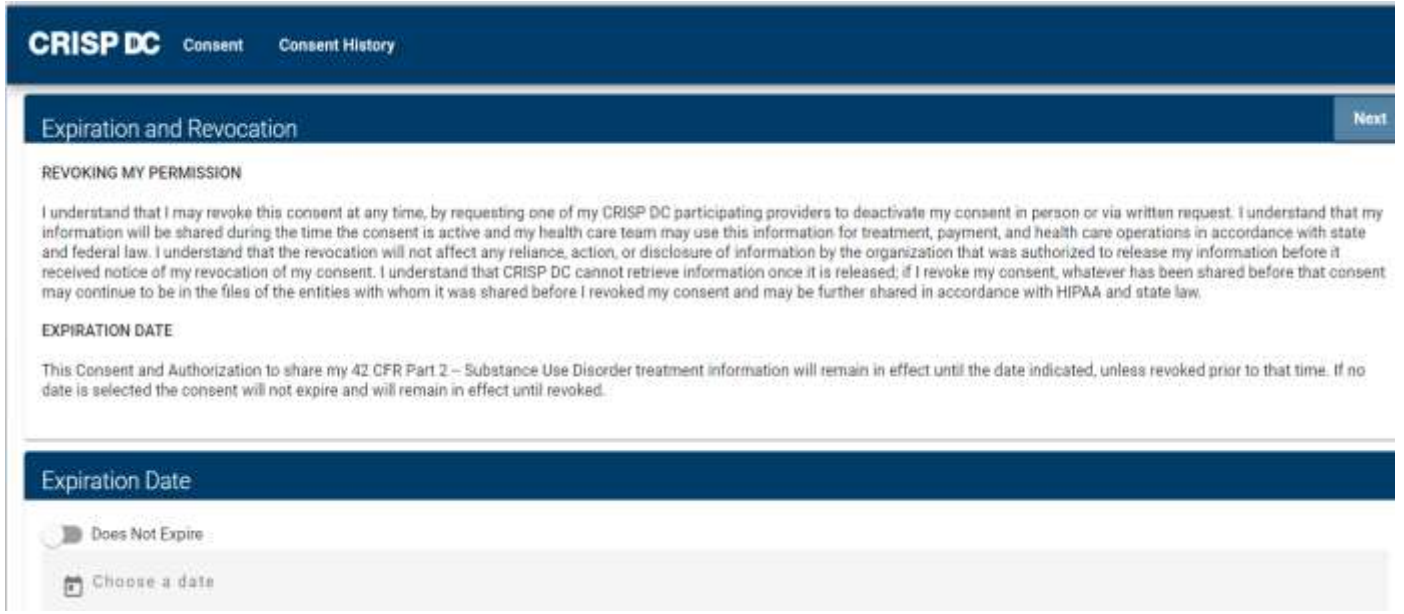
Expiration Date:

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

NOTE: If any fields in the SUD Consent Form are left blank, the form is invalid and providers/staff must not register the patient's consent preferences unless the form is 100% complete

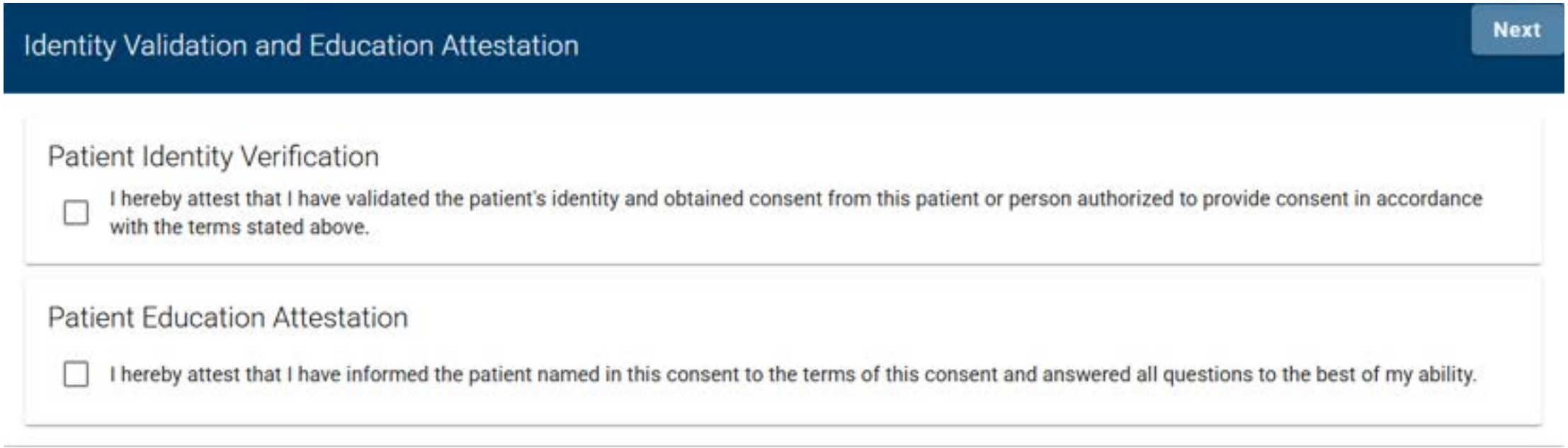
Review the revocation and expiration sections

- These sections explain the process and result of revoking this consent, which the patient may do at any time.
- The expiration date will automatically be set to “does not expire”. If the patient wants to select a date in which their Consent does expire, toggle the “does not expire” and click on the calendar icon, the patient may select whichever expiration date they would like.



- For telehealth patients, this must be edited to match the expiration date on the SUD Consent Form, as indicated by the patient.
- For in-person visits, this date may be updated to anything in the future based on discussions with your patient.

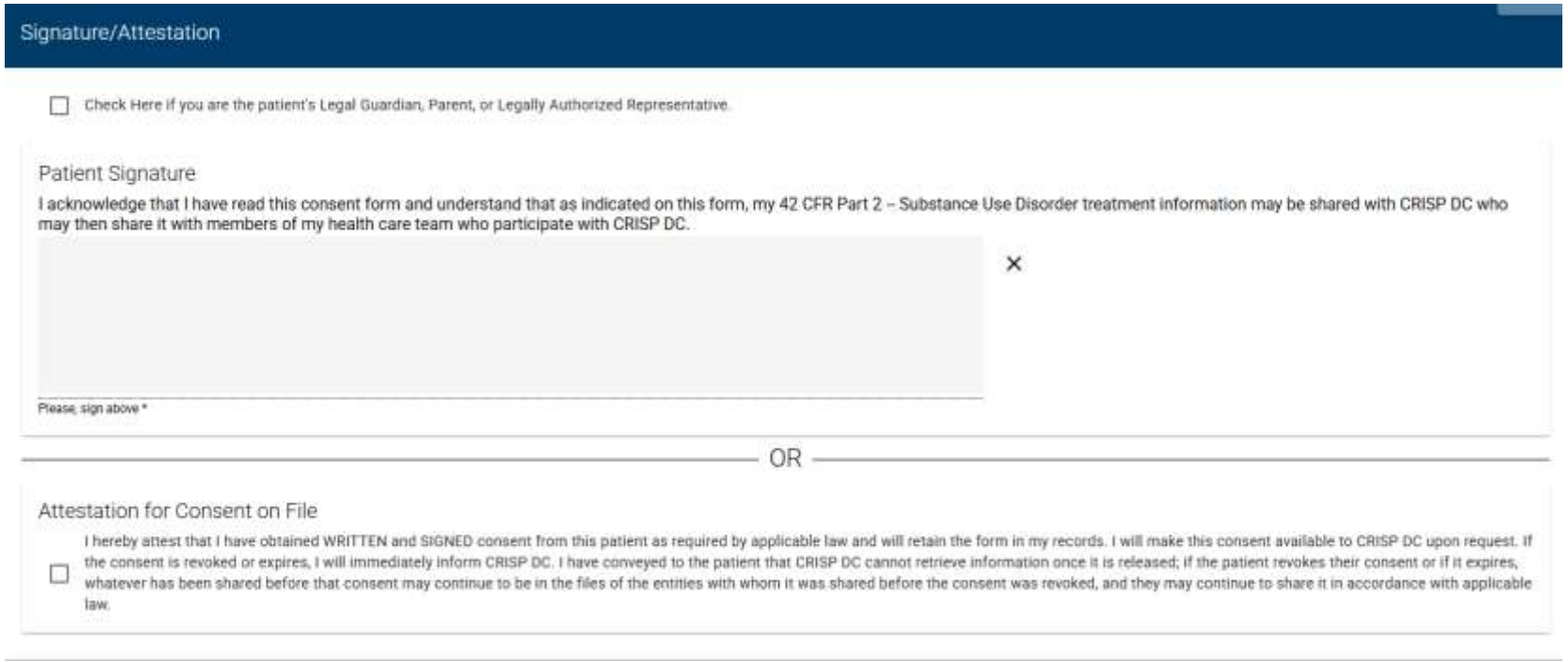
Complete provider attestations



Providers/staff obtaining patient consent **must** attest that they have:

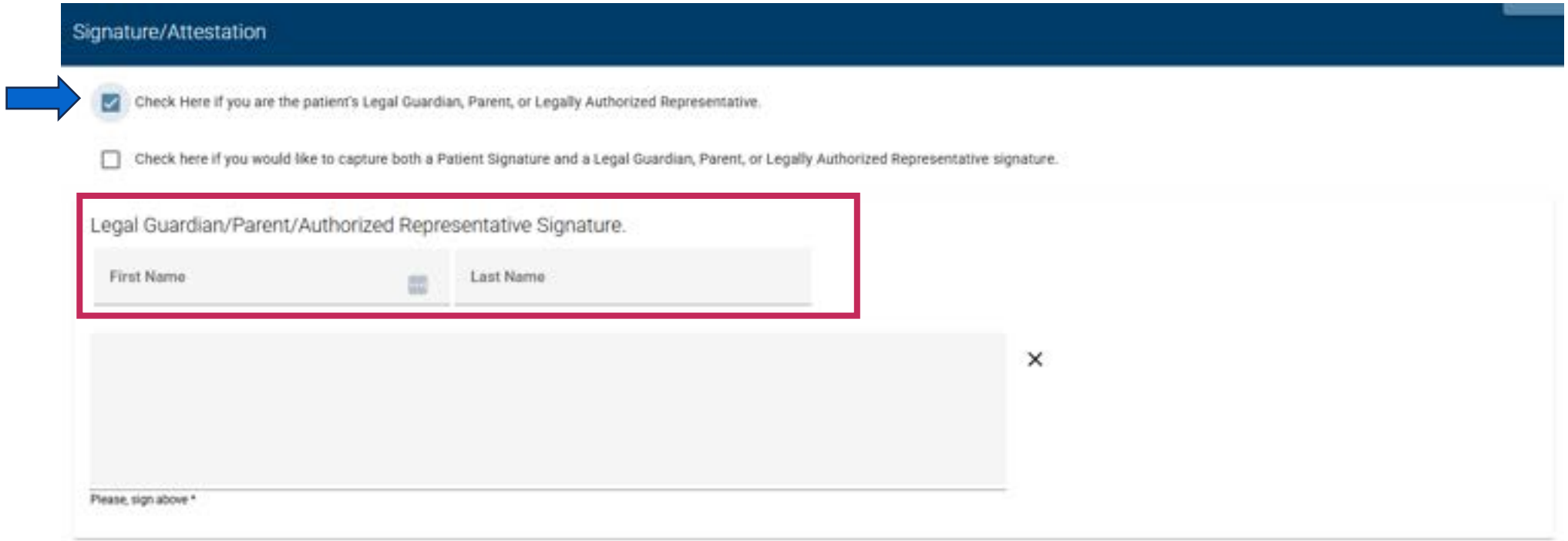
1. Verified the patient identity *and;*
2. Informed the patient of all terms of the consent.

Complete signature section



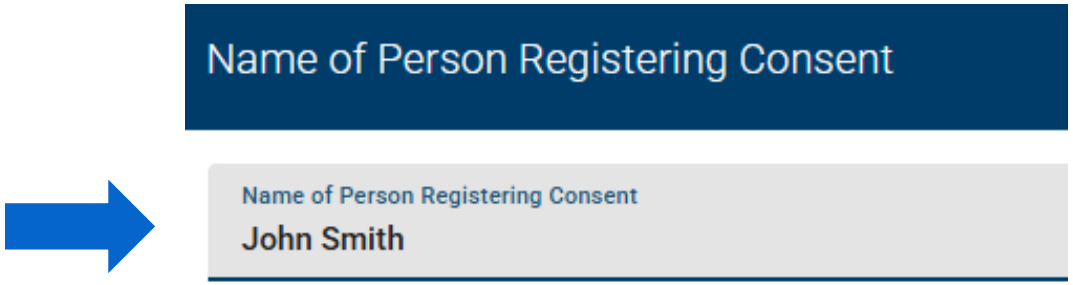
- For in-person registration:
  - Patient enters electronic signature using a mouse, stylus pen, or finger via touchscreen/ signature pad.
- For registrations of telehealth patients:
  - Check the box under "Attestation for Consent on File."
  - CRISP SUD Consent Form or a substantially similar form **must** be completed by the patient *before* attesting.

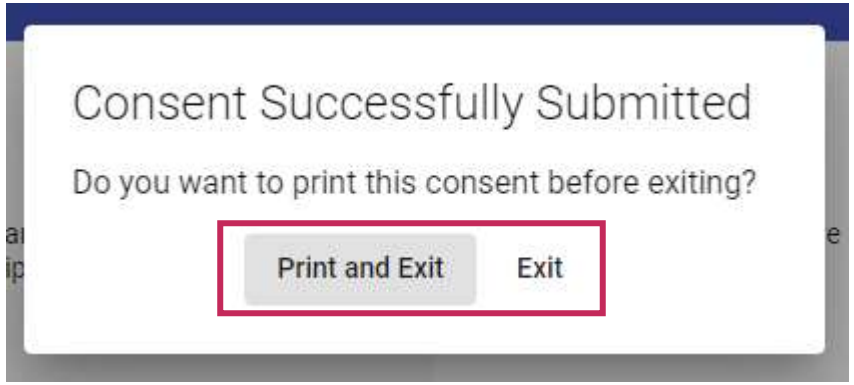
Legal guardian, parent, or legally authorized representative signature (as applicable)



- Checkbox only required if the person signing the consent is the patient's legal guardian, parent, or legally authorized representative.
- The person signing on behalf of a patient MUST enter their name into the form and electronically sign.

8. Submit Consent



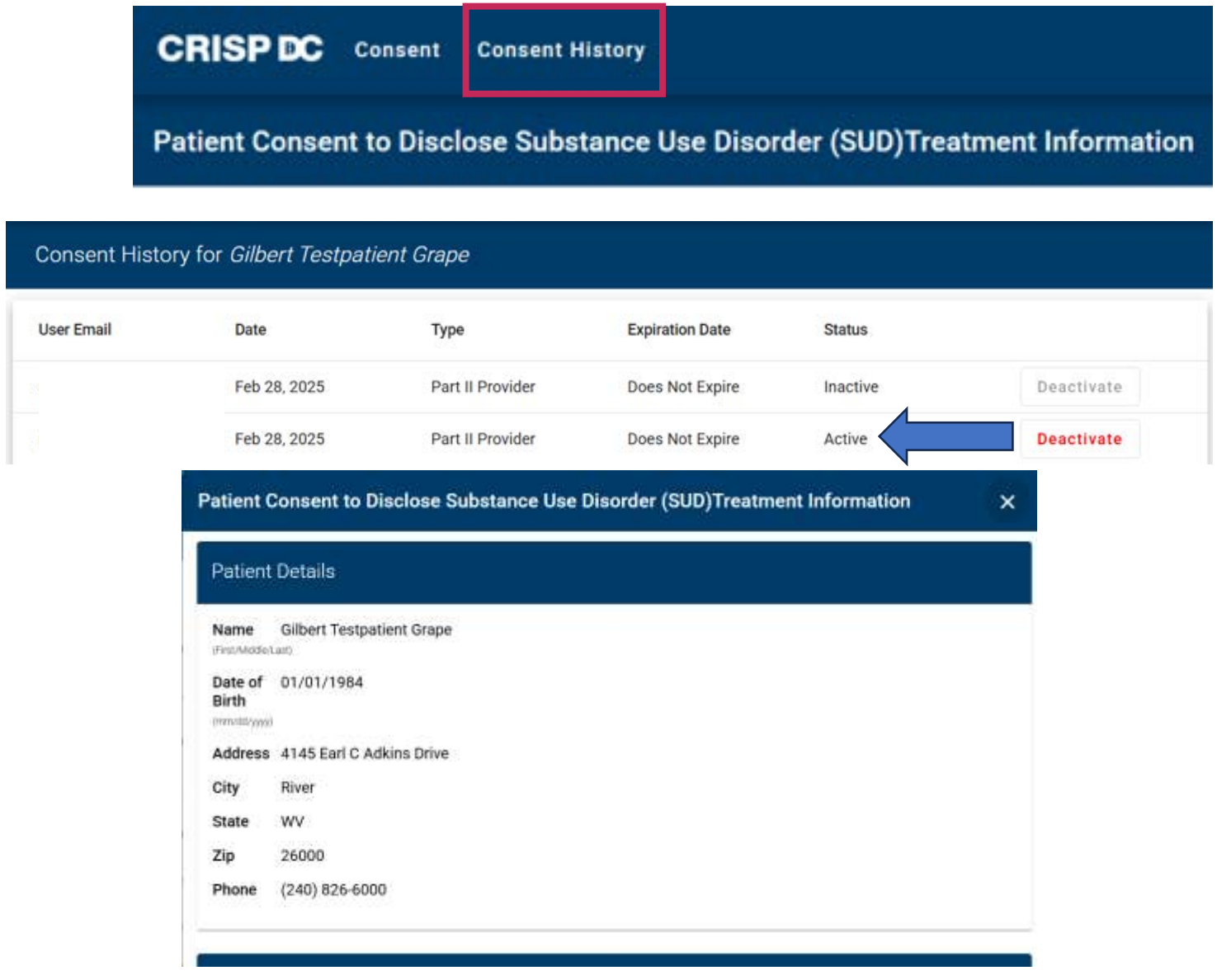


- Enter the name of the person registering this consent.
- Click "Submit" once – to avoid duplicate entries.
- Click "Print and Exit" or "Exit."

Additional Functions in the Consent Tool

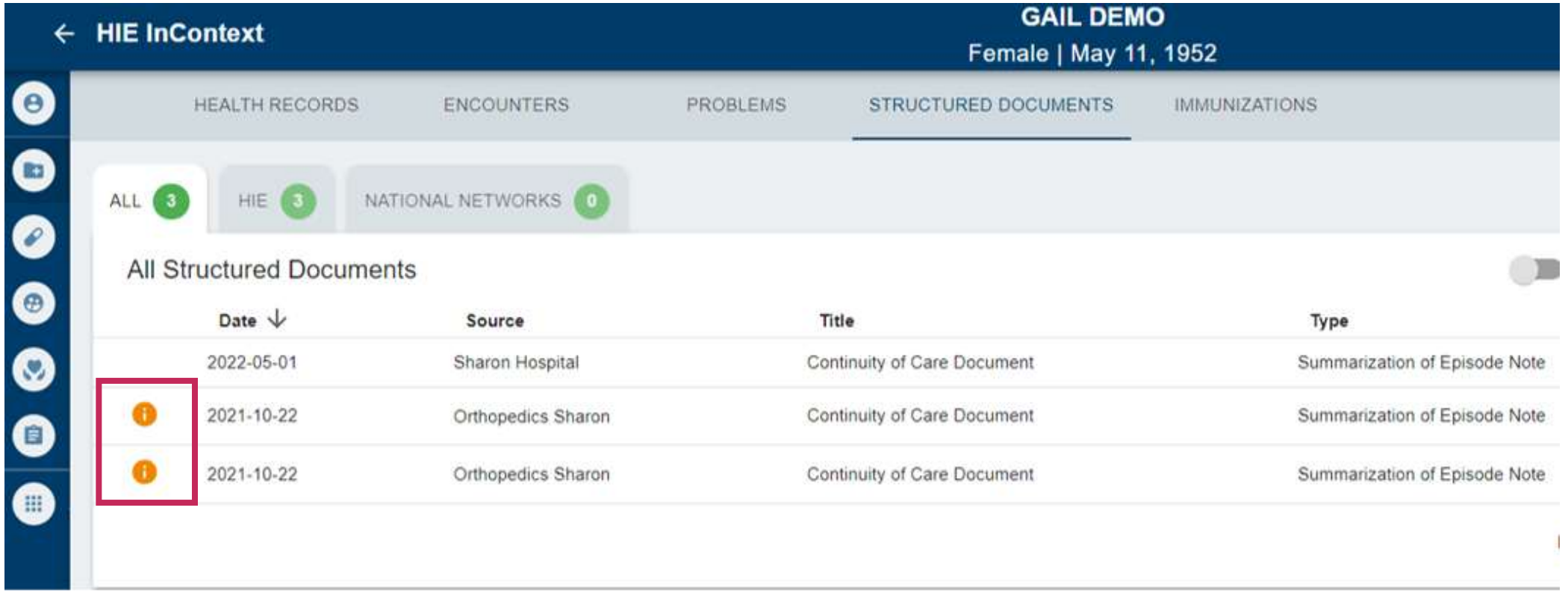
How to view consent history

- After searching for your patient, click "Consent History."
- Click on a row to open that consent.
- A pop-up window will appear with the consent registration details.



How to view patient SUD Data

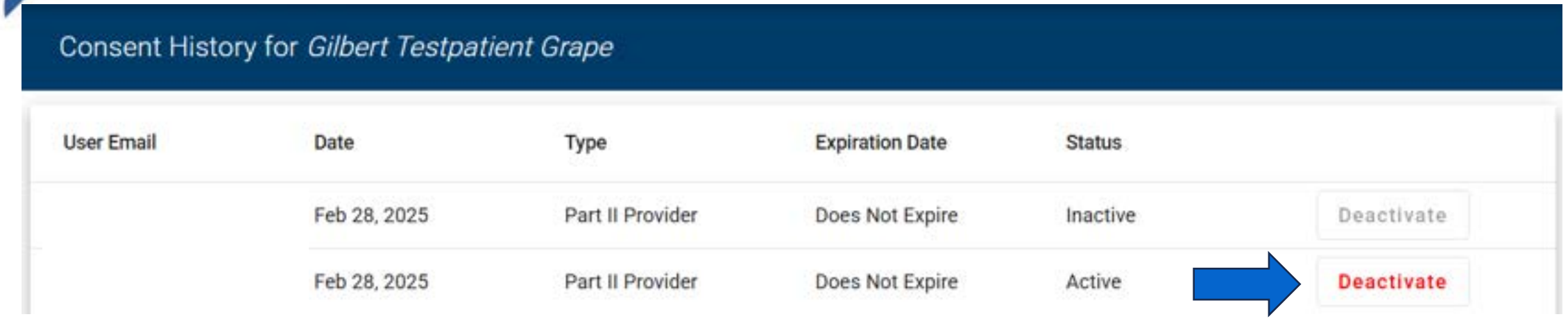
- Once consent is submitted for a patient their SUD data covered by 42 CFR Part 2 will be identified within the DC HIE with an orange ‘i’
- This makes the data easily identifiable amongst other clinical data within the HIE



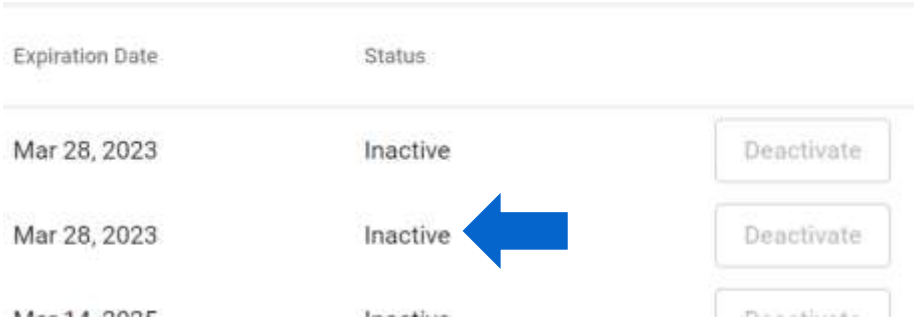
How to print a consent registration

- 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.

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's status will then update as "Inactive."



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For CRISP DC related inquiries please contact outreach at dcoutreach@crisphealth.org.

For support contact support@crisphealth.org or call 833.580.4646.

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