FOOTHOLD TECHNOLOGY

Interoperability Center - RHIO Consents

AWARDS Instruction Sheet

Overview

Regional Health Information Organizations (RHIOs) allow for the sharing of client data from a program with any other providers that are a part of the same network. That data can then be accessed via the RHIO portal. AWARDS makes available to agencies a set of functionality that enables them to work directly with the RHIOs that they belong to, transmitting client data to the portal upon intake/admission, merge, transfer, discharge, demographics information update, and consent form completion. Whether or not that client data can be accessed from within the RHIO's portal is based (with the exception of emergency scenarios) on the last - client consent.

Because consent is such an important factor, a key component of the RHIO-related functionality in AWARDS concerns maintenance of client consent information. This information can be worked with via the Interoperability Center (a central point of access in the System Setup module for RHIO-related functionality in AWARDS), as well as from within those modules staff interacts with on a daily basis as they work with client records (including Intake/Admission and Profile).

★ ***Important!*** *In order to use the AWARDS Interoperability Center and its RHIO-related functionality, it must have been turned on and configured for your agency by Foothold Technology. If you are interested in using this functionality and it has not yet been set up for you, please review our* ***Interoperability Center*** *- Information Sheet and Service Agreement guide, and/or contact our Meaningful Use team at mu@footholdtechnology.com for assistance.*

☀ ***Tip:*** *AWARDS accepts consents for minors from parents or guardians and zeroes them out at the client's 18th birthday. After the consumer's 18th birthday a consent from the (now) adult client can be collected. This feature is on by default for all health information exchanges (HIE), but your HIE may not accept certain consents or ask Foothold Technology to turn the feature off based on their specific policies.*

Required Permissions

Various individuals within an agency can maintain consent information and work with other Interoperability functionality. For documentation purposes, we've grouped those individuals into two categories - "Administrators" who have access to the full Interoperability Center in the System Setup module, and "Line Staff" who do not have access to the Interoperability Center and who will instead be limited to interfacing with a single Interoperability component - RHIO-related consents information - integrated into the daily workflow of the Intake/Admission and Profile modules.

☀ ***Tip:*** *The document you are currently viewing is intended for use by all staff and is limited to working with consent information. If you are an administrator and will be using the full Interoperability Center, please also refer to our* ***Interoperability Center*** *- Administrator's Guide. It details use of all Interoperability components.*

Permissions required for both categories of user to access and maintain consent information are provided here.

- **Administrators -** Permissions required to use the Interoperability Center are as follows:

Program Chart Access *
Interoperability Center

And ONE of the following permissions:

Display Executive Administration Buttons
Permissions Data Entry
Permissions Data Entry for All Staff and Layers

*Tip: The **Interoperability Center** permission is assigned by Foothold Technology. Please contact the Help Desk if you need access.*

Note: Members of the "Executive Officer" and "System Administrator" user groups are exempt from all but the Interoperability Center permit.

If you will also be accessing consents information from outside of the Interoperability Center as line staff do, be sure to review the "Line Staff" requirements as well.

- **Line Staff -** RHIO consents information is recorded by line staff in the Intake/Admission and Profile modules. In order to maintain and view that information, you must have the following permissions:

Note: The permissions information detailed here provides access to BOTH the Intake/Admission and Profile modules; however, if you will only be processing the admissions of new clients (including their RHIO consents) you only need access to Intake/Admission, and if you will only be working with existing clients you only need access to Profile. Please refer to AWARDS Online Help for information on the permissions needed to access only one of these modules or the other.

Program Chart Access
Display Chart Records Buttons
Display Chart Records Intake/Admission Button
Display Chart Records Profile Button
Referrals Data Entry
Program Admission/Discharge

About This Document

This document is intended to guide you through the process of maintaining and viewing RHIO consents information in AWARDS. Specific topics covered are:

Accessing RHIO Consent Forms

There are several ways to access and work with RHIO consent forms for clients. The specific steps you take during the process of completing and working with forms will be based on the task you need to perform, whether you are working with a new or existing client, and whether you are an administrator with access to the Interoperability Center or line staff who only has access to basic AWARDS modules. Specifically, RHIO consents can be accessed from the following AWARDS locations:

- **The Intake/Admission module > During intake/admission** - During the intake or admission process for each new client, you will automatically be prompted to complete a RHIO consent form. The specifics of this process are detailed under Completing a Consent Form for a New Client.

- **The Intake/Admission module** > **After admission -** After admission, consent forms can be accessed from the client's completed intake/admission form for data entry or viewing purposes as detailed under Working with Consent Information for an Existing Client.
- **The Profile module** > **Face Sheet** - Within an individual client's face sheet in the Profile module, his or her RHIO consents can be accessed for data entry or viewing purposes as detailed under Working with Consent Information for an Existing Client.
- **The Reports module** > **Demographics ReportBuilder** - Using the Demographics ReportBuilder, located in the Reports module, consent status information can be viewed for multiple clients at once, as detailed under Reviewing Consent Status Information.
- **The System Setup module** > **Interoperability Center** > **Administration** - The Interoperability Center is a central point of access for RHIO-related AWARDS functionality that is available to System Administrators with the proper authority. Within that feature administrators can maintain and view the consent information for individual clients as detailed under Working with Consent Information for an Existing Client.

Completing a Consent Form for a New Client

When a program is part of a RHIO network, the admission process for new clients into that program automatically includes entry of the consent form for that RHIO (likewise with the intake process if the program uses multi-step intake). To complete the consent form during the admissions process, complete the following steps:

✎ ***Note:*** *This process is the same regardless of whether you are an administrator or line staff.*

1. Begin processing the admission as you normally would, based on the type of intake process in use by the program. (Details on both single- and multi-step intake/admission can be found in AWARDS Online Help.)
2. Upon clicking **PROCESS ADMISSION** (when in a single-step program) or **UPDATE** from the Process Admission form (when in a multi-step program), the *Consent Form* page is displayed.

   ☀ ***Tip:*** *In the event that the program has been configured for more than one RHIO connection, the consent form for the first connection is immediately followed by the form for the second connection. In such cases be sure to complete the following steps for both consents.*

   ★ ***Important!*** *Please keep in mind that although AWARDS is program-centric, RHIO consents are client-specific. If a consent form is completed in one program, that same consent form with the previous consent submitted value is pre-populated during admission to other programs. It will be displayed in read-only form, and any necessary changes should be made using the Working with Consent Information for an Existing Client process once admission is complete. In such cases, the remaining steps in the process of completing a consent form for a new client are not relevant.*

3. Near the bottom of the page, click the **Patient or Legal Representative was given a copy of this form in** drop-down arrow and select the appropriate language.
4. Click the appropriate **Consent Terms** radio button to indicate whether the client you are admitting GIVES or DENIES consent.

   ☀ ***Tip:*** *If the client has not yet decided whether to give or deny consent, the form does not need to be filled out now; instead, skip this and the remaining steps and click **SKIP THIS QUESTION** at the bottom of the page. (The SKIP button is only available in the event that a consent has not been previously given or denied by this client; for example, during a previous admission.)*

Skipping this question, or later withdrawing consent, places the client in a "break-the-glass" status, which means that in certain emergency situations an authorized provider can obtain life-saving information on this client. You can complete the consent at a later time using the process detailed under Working with Consent Information for an Existing Client.

---

5. Click **CONTINUE** at the bottom of the page. The *Electronic Signatures* dialog box is displayed.

6. Click the **Patient** or **Patient's Legal Representative** radio button to indicate who will be signing this consent form.

7. Click **CONTINUE**. The *Electronic Signatures Client Signing* dialog box is displayed.

8. Click the appropriate **Sign by** radio button to indicate how the client or his/her legal representative will sign.

✎ ***Note:*** *The PIN option is only available when "Patient" was selected in step **6**. Other options are based on electronic signatures configuration in your database. For more information on the signing types and electronic signature configuration and signing processes in general, refer to AWARDS Online Help.*

---

9. Click **OK**, and then complete the corresponding signing process:

   - **Signing by PIN** - Forms can be signed using initials or full name images. Click the **Sign With** radio button next to the type of image with which the client is to sign this form.

     ★ ***Important!*** *If the client does not have a PIN (which will always be the case for any new client not currently enrolled in another AWARDS program), and you do not have the ability to assist him/her in setting one up, he/she will be prevented from signing the consent form using this method. If you DO have the ability to assist the client in setting up a PIN, click the **Click here to Assign a PIN** link displayed at this time and complete the configuration process.*

     In the **PIN** field, direct the client to type his/her five-digit PIN to confirm his/her identity. To exit without signing the form, click **Cancel**.

   - **Signing by Signature Pad** - Direct the client or legal representative to use the signature pad to enter his/her signature. Click **Draw** to give focus to the signing area before the client/representative signs on the pad, **Clear** if you'd like to clear what has been entered using the pad, or **Cancel** to exit without signing the consent.

   - **Signing by Touch** - Direct the client or legal representative to use his/her finger or a stylus to enter his/her signature directly on the screen when using a tablet, touchpad, or other touch-enabled device, or to use the mouse to sign on the screen if the device is not directly touch-capable. Click **Clear** if you'd like to clear what has been entered, or **Cancel** to exit without signing the form.

   On the e-signing interface the client or other individual may also be asked to select authority level information, and in the case of legal representatives, to enter his/her name and title on the page. Be sure to complete those data entry steps in addition to the actual signing described above.

   Once the appropriate signing method has been used, including any corresponding data entry, continue with step **10** to complete the signing process.

10. Have the client or legal representative click **SIGN NOW**.

★ ***Important!*** *Clicking the SIGN NOW button is an acknowledgment that the individual doing so is the authorized signer. An electronic signature constitutes a legally binding symbol that authenticates the document to which it is attached.*

---

11. The consent form is electronically signed and locked, and you are now prompted to complete any remaining steps in the admission process.

The process of completing a consent form for a new client is now complete. To maintain or view that consent information in the future, refer to the instructions under Working with Consent Information for an Existing Client.

Working with Consent Information for an Existing Client

To work with the consent information for an existing client - including adding a new consent form, changing the individual's consent status, or simply viewing an existing consent form - complete the following steps:

1. Begin by navigating to the RHIO consents index for the client in one of the following ways:

    - **From Intake/Admission** - Open the client's intake form and click **Network Consent** (typically found at the top of the page or above the demographics information portion of the form).

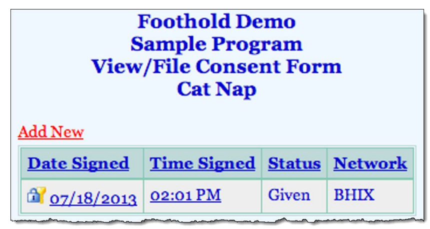
    - **From Profile** > **Face Sheet** - Open the client's face sheet and click **Network Consent** at the top of the page.

    - **From System Setup** > **Interoperability Center** > **Administration** - From the *Interoperability Settings* page click the **Program** drop-down arrow and select the client's program, click the **Actions** drop-down arrow and select "View/File Consent Form," and then click **CONTINUE**.

    ☀ ***Tip:*** *If working with consent records for a former (discharged) client, click* ***Roster Archives*** *before clicking CONTINUE.*

    On the page that follows, click the **Client** drop-down arrow and select the individual whose consent records are to be worked with, and then click **CONTINUE**.

    The *View/File Consent Form* page is displayed. This page lists any existing consent activity for the selected client, as well as the option to add a new consent form.



Foothold Demo
Sample Program
View/File Consent Form
Cat Nap

Add New

Date Signed	Time Signed	Status	Network
07/18/2013	02:01 PM	Given	BHIX

2. At this time, complete any of the following consent activities as needed:

    - **Open an existing consent** - Click the link for the consent to be viewed. The consent is displayed and can be printed, or the client or his/her legal representative can sign it if only one of the two signed it initially and both signatures are needed.

    - **Add a new consent** - To complete a consent form for the client that grants or denies consent, click **Add New**. The *Add New* dialog box is displayed. Click **Consent**.

    ✎ ***Note:*** *In the event that the program is configured for more than one RHIO network connection, you will first be asked to specify which connection the consent record is being added for. If applicable, make the appropriate selection and continue to display the consent form as detailed below.*

    The consent form is displayed. Fill out the data entry fields/options on the form, and then click **CONTINUE**. Next, complete steps **3** through **10** from Completing a Consent Form to have the client or his/her representative e-sign the form.

    - **Withdraw consent** - To complete a consent form for the client that withdraws a previously granted consent and places the client in "break-the-glass" status, click **Add New**. The *Add New* dialog box is displayed. Click **Withdrawal**.

✎ ***Note:*** *In the event that the program is configured for more than one RHIO network connection, you will first be asked to specify which connection the consent record is being withdrawn for. If applicable, make the appropriate selection and continue to display the withdrawal form as detailed below.*

The withdrawal of consent form is displayed. Fill out the data entry fields/options on the form, and then click **CONTINUE**. Next, complete steps **3** through **10** from Completing a Consent Form to have the client or his/her representative e-sign the form.

3. Once a consent activity is completed the updated *View/File Consent Form* page is displayed. Repeat step **2** as needed.

The process of working with consent information for an existing client is now complete.

Reviewing Consent Status Information

To check the RHIO consent status of an **individual client**, you can access and view his/her consent forms using one of the methods listed in step **1** of Working with Consent Information for an Existing Client.

☀ ***Tip:*** *When accessing the client's records via Intake/Admission or the Face Sheet you can quickly and easily determine the consent status without taking the extra step of going into the Network Consent feature. Specifically, to the right of the client's name on the intake form and face sheet you'll see an icon indicating his/her current consent status:*

Consent Given

Consent Denied *- OR -* ***Consent Withdrawn*** *- OR -* ***Undecided***

Hovering over the icon with your mouse cursor provides additional status details, including the name of the relevant RHIO.

If the program is configured for more than one RHIO network connection, more than one icon will be displayed, in order to indicate the consent status for each of those connections.

You can also view consent status information for **groups of clients** from within the **Demographics ReportBuilder,** accessed from the **Reports** module. To do so, begin the process of generating a Demographics ReportBuilder report as normal. (Complete instructions on this process can be found in AWARDS Online Help.)

On the initial *Options* page, be sure to check off the **Consent Status** variable, along with any other relevant data variables. From this page, proceed with the process of generating the report, being sure to check off the **Show Individual Detail** viewing option on the *Options - Continued* page if you want to view the status information for individual clients rather than summary information only.

In the content of the generated report you'll see a column for "Consent Status." Each client with consent information will have the consent status listed for him or her as "[RHIO Network Name]:[Status]" as shown in the example at right.

Name (First Last)	Consent Status
Lily Pad	
Banana Bread	
Cat Nap	BHIX: Given
Cat Nip	

✎ ***Note:*** *In the event that the program is configured for more than one RHIO network connection, the consent status for each of those connections is listed in the report results in a comma-separated list.*

The process of reviewing consent status information is now complete.