

EHR 5.9/8.4 Enhancements: Consent for PHI Module

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Note: Please be advised this information is consistent with the 5.9 BETA application version. Additional changes may occur prior to the final application release.

Agenda

- Purpose
- Functionality
- Setup
- Consent Rules
- Additional Information



Consent to Share PHI Module



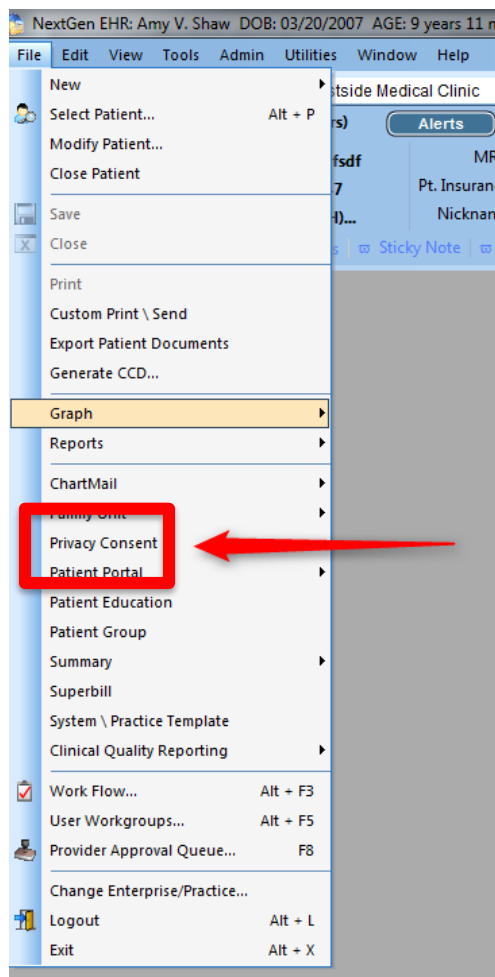
Consent to Share PHI

Purpose

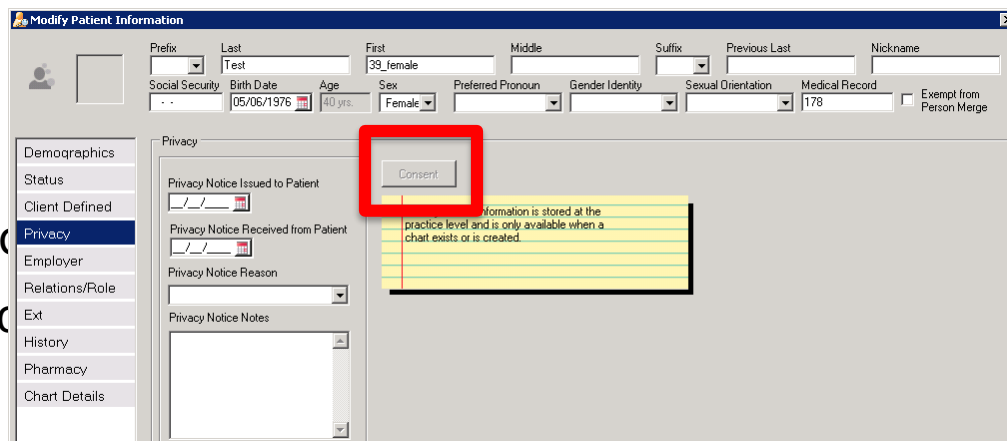
- Update to existing module
 - Previously referred to as HIE Consent Module
- Create consent policies on a per patient basis to share PHI with External Systems
- Consent policies can be created on multiple levels
 - Enterprise
 - Practice
 - Patient



Consent to Share PHI



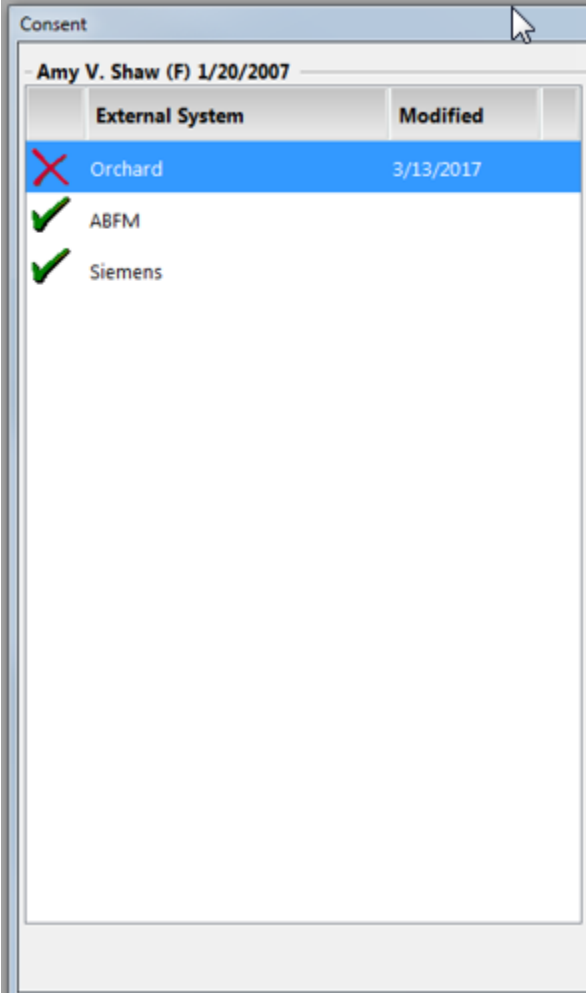
Privacy Consent > Privacy Demographics



Consent to Share PHI

Functionality

- Module Layout
 - Left panel displays External Systems that have a previously configured consent policy
 - X means patient is not sharing with that system
 - Checkmark means patient is sharing with that system



External System	Modified
<input type="checkbox"/> Orchard	3/13/2017
<input checked="" type="checkbox"/> ABFM	
<input checked="" type="checkbox"/> Siemens	

Consent to Share PHI

Functionality

- General tab
 - Data is based on selected External System
 - Enterprise Patient
 - Yes or No
 - Indicates if the patient has Enterprise Chart enabled
 - Consent Status
 - Indicates the sharing value for that External System

The screenshot displays the 'Consent' window for patient Amy V. Shaw (DOB: 1/20/2007). On the left, a table lists external systems:

External System	Modified
Orchard	3/13/2017
ABFM	

The 'Orchard' system is selected, and its details are shown in the main form area:

- Enterprise Patient?**: Yes
- Consent Status**: Don't Share (dropdown menu)
- Effective Date**: 03/13/2017 (dropdown menu)
- Patient Override?**: Yes

Red arrows in the original image point to the 'Enterprise Patient?' and 'Patient Override?' fields.

Consent to Share PHI

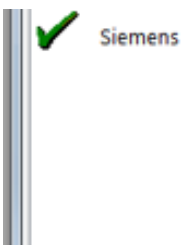
Functionality

- General tab
 - Effective Date
 - Date consent was originally documented
 - Patient Override
 - Yes or No
 - Indicates if Sharing Value was added by user rather than using default Enterprise or Practice value


Consent to Share PHI

Functionality

- General tab
 - Consent Applies to the Following Practices
 - List of practices that have consent policies for that External System
 - Enterprise Patients would have consent applied to all practices even if they are not listed here



Consent Status applies to the following practices:

Practice	Address
 .NEXTGEN Medical...	795 Horsham Road, Horsham, PA, 19044



Consent to Share PHI

Functionality

- General tab
 - Do Not Ask Again
 - Indicates not to ask for consent on that External System again
 - Include Reason
 - Has Document
 - Scanned documents for consent that go with the External System
 - List location of document
 - Comments
 - Free Text



Consent to Share PHI

Consent

Amy V. Shaw (F) 1/20/2007

External System	Modified
Orchard	3/13/2017
ABFM	
Siemens	

Orchard

General Advanced

Enterprise Patient? **Yes** Consent Status Don't Share Effective Date 03/13/2017 Patient Override? **Yes**

Consent Status applies to the following practices:

Practice	Address
.NEXTGEN Medical...	795 Horsham Road, Horsham, PA, 19044

Do Not Ask Again

<Do not ask again reason>

Has Document

<Location>

Comments

<Comments>

Note: Enterprise Default is 'Share', Practice Override is 'Don't Share'

Use Default Update Close

Consent to Share PHI

Functionality




- Advanced tab
 - Confirmed By
 - Who gave consent for the selected External System
 - Last Modified By
 - Last user who documented the consent override for the selected External System
 - Alert Icon indicates system cannot determine consent status
 - No consent confirmation or override documented



Consent to Share PHI

Privacy Consent

- Amy V. Shaw (F) 1/20/2007

External System	Modified
 Orchard	3/28/2017
 ABFM	3/28/2017
 Siemens	3/28/2017

- Orchard

General | **Advanced**

Confirmed By: Jason Argo notty - Adopted Child - Next of Kin

Last Modified By: NextGen Admin @ 3/15/2017 3:37:08 PM

Use Default Update Close

Consent to Share PHI

Functionality

- Consent Policies
 - Consent to Share PHI is not just a simple Yes or No
 - Different variables can affect how the consent is handled
 - Directionality
 - When will the PHI be shared with the External System
 - Publish
 - Does the patient want to share information only when it's published to an HIE?
 - Access
 - Does the patient want to share only when the External System requests the data



Consent to Share PHI

Functionality

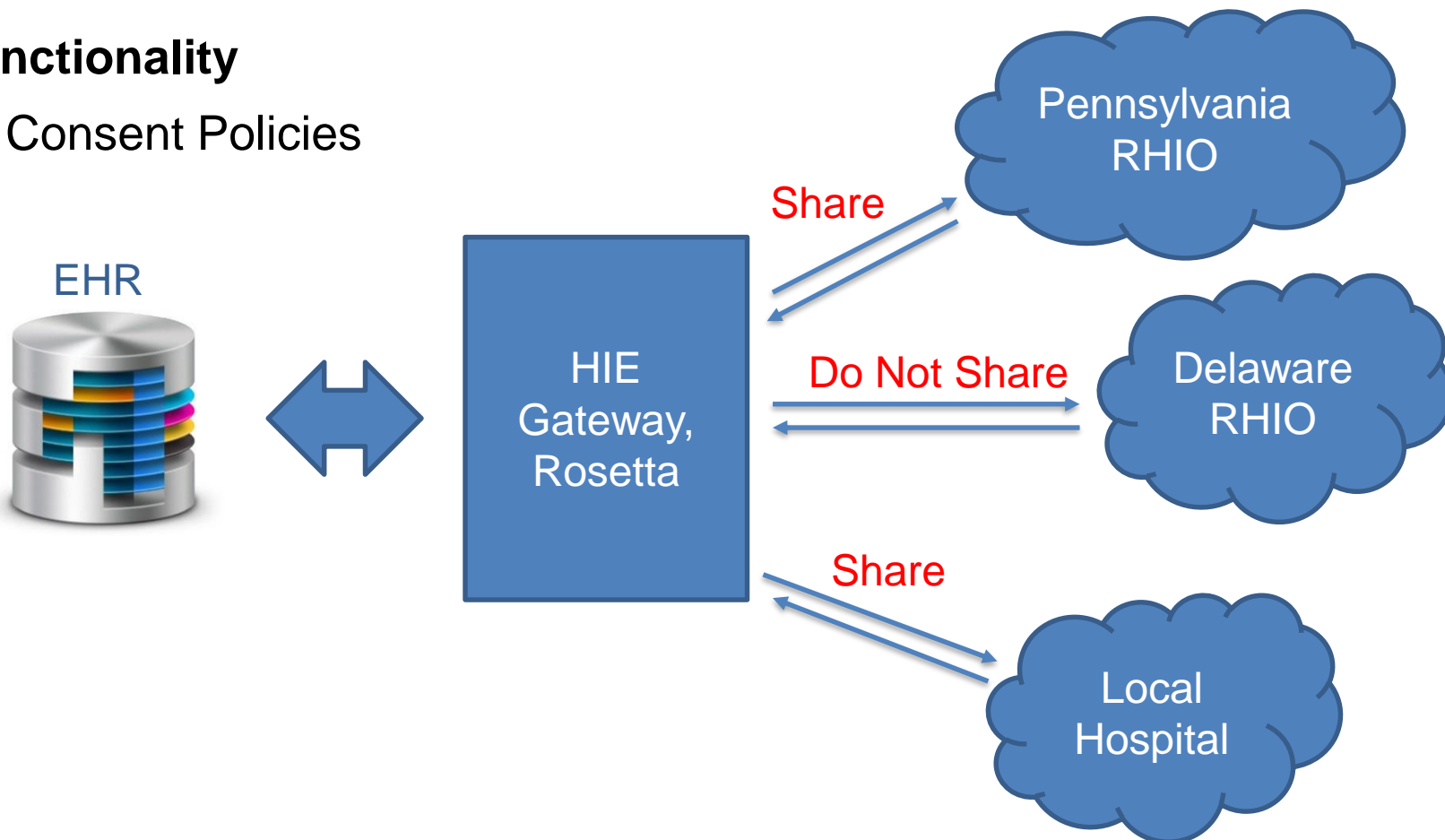
- Consent Policies
 - Enforcement
 - Where is the consent policy enforced?
 - Local
 - External
 - Level
 - Enterprise
 - Practice
 - Multiple External Systems



Consent to Share PHI

Functionality

- Consent Policies



Consent to Share PHI

Setup

- HIE Gateway
 - Enterprise Consent Configuration
 - Required for each External System
 - NextGen Share automatically configures a consent policy for that External System upon installation
 - Other External Systems require manual configuration

NEXTGEN
HEALTHCARE

Home Orchard ABFM LabCorp Siemens Inbound Service LogView

Tasks Enterprise Consent Configuration

General Configuration +
Database Configuration
System Logging
Configuration
Create New External System
Consent Configuration
CRK Report Codes
Third Party Components

Enterprise	External System	Policy	Consent
.NEXTGEN Medical Enterprise	Orchard	Policy A	Share

Consent to Share PHI

Setup

- HIE Gateway
 - Consent Configuration Task tab
 - Expand for more details
 - Edit Consent Policy (Enterprise)
 - Policy
 - Directionality
 - Default
 - Global
 - Enforcement
 - Specification

Consent to Share PHI

Setup

- HIE Gateway
 - Consent Configuration Task tab

NEXTGEN
HEALTHCARE



Tasks Edit Consent Policy for .NEXTGEN Medical Enterprise/Orchard

- [General Configuration](#)
- [Database Configuration](#)
- [System Logging Configuration](#)
- [Create New External System](#)
- [Consent Configuration](#)
- [CRR Report Codes](#)

Policy	Policy A	?
Directionality	Publish ▼	?
Default	Share ▼	?
Global	<input type="checkbox"/>	?
Enforcement	Local ▼	?
Specification	HL7 ▼	?






Consent to Share PHI

Setup

- HIE Gateway
 - Consent Configuration Task tab
 - Codes
 - Values that display in the module

Codes

+					
		Code	External Code	Display Name	Action
		Yes- Code	Yes - External Code	Yes - Display Name	Y
		No - Code	No - External Code	No- Display	N

Consent to Share PHI

Setup

- HIE Gateway
 - Consent Configuration Task tab
 - Practice Overrides
 - List Practices that do not want to share with this External System

Practice Overrides



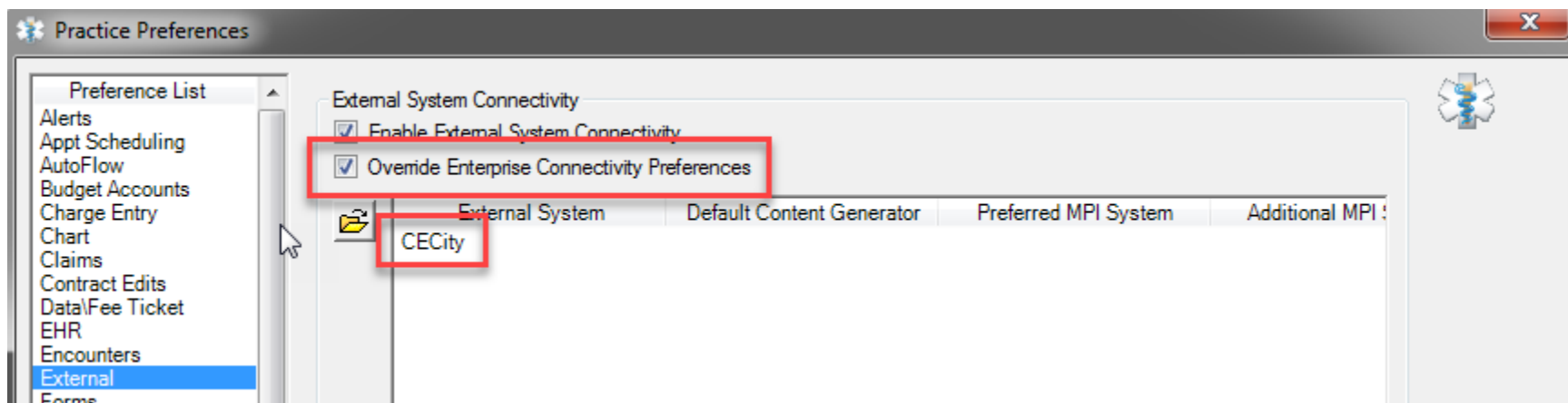
	Practice Name	Practice Address	Consent
 	.NEXTGEN Medical Practice (Horsham)	795 Horsham Road Horsham 19044	Don't Share

Save

Consent to Share PHI

Setup

- File Maintenance – Practice Preferences
 - Required for Practice Override setting to function
 - External tab
 - Override Enterprise Connectivity Preferences
 - Choose External System



Consent to Share PHI

Consent Rules

- Enterprise Default
 - Configured for each External System
 - Consent status applies to the whole Enterprise
 - Enterprise Patient with no Patient Override
 - Non-Enterprise Patient with no Practice Level or Patient Level Override
- Practice Override
 - Practice chooses to override the existing enterprise default with a different status
 - Non-Enterprise Patient with no Patient Level Override

Consent to Share PHI

Consent Rules

- Patient Level Override
 - Patient chooses a different consent status from the enterprise default or practice override
 - Trumps all other rules

- HIPAA states that consent from the patient is not needed to share PHI for treatment, payment or operations purposes



Consent to Share PHI

Enterprise Chart Rules

- Consent Rules are affected by Enterprise Chart settings
- If all patients have an Enterprise Chart, the practices do not need to set up a Practice Override
 - All patients will have the Enterprise Default
- System will not allow Enterprise Chart to be enabled in Enterprise Preferences if any consent policies exist in the database already
 - Would have to disable all consent policies to enable Enterprise Chart

Consent to Share PHI

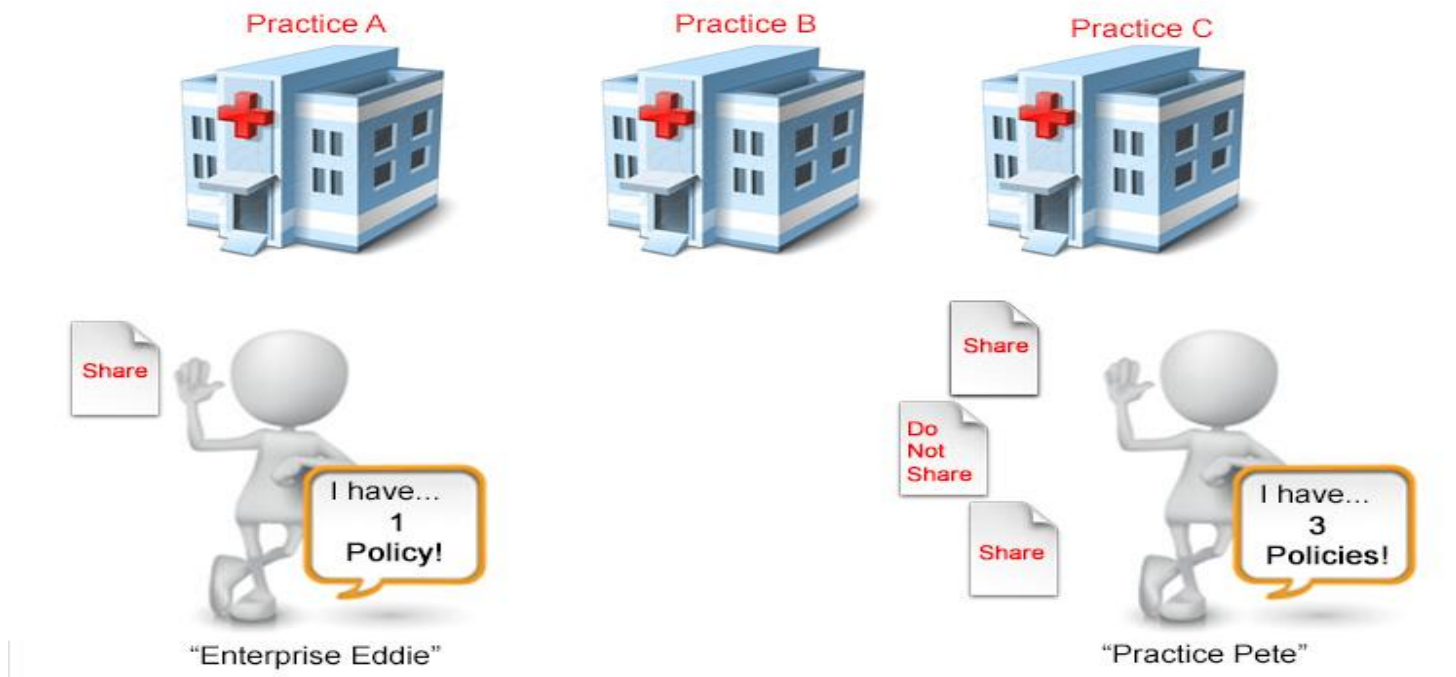
Enterprise Chart Rules

- Possible Scenarios
 - Enabling Enterprise Chart (at the patient level) when Consent Policies are already created
 - Enterprise Default
 - Patient is using the enterprise default because no practice or patient overrides exist
 - User enables Enterprise Chart in patient demographics
 - Patient is now (still) using enterprise default

Consent to Share PHI

Enterprise Chart Rules

- Enable Enterprise Chart with Enterprise Default



Consent to Share PHI

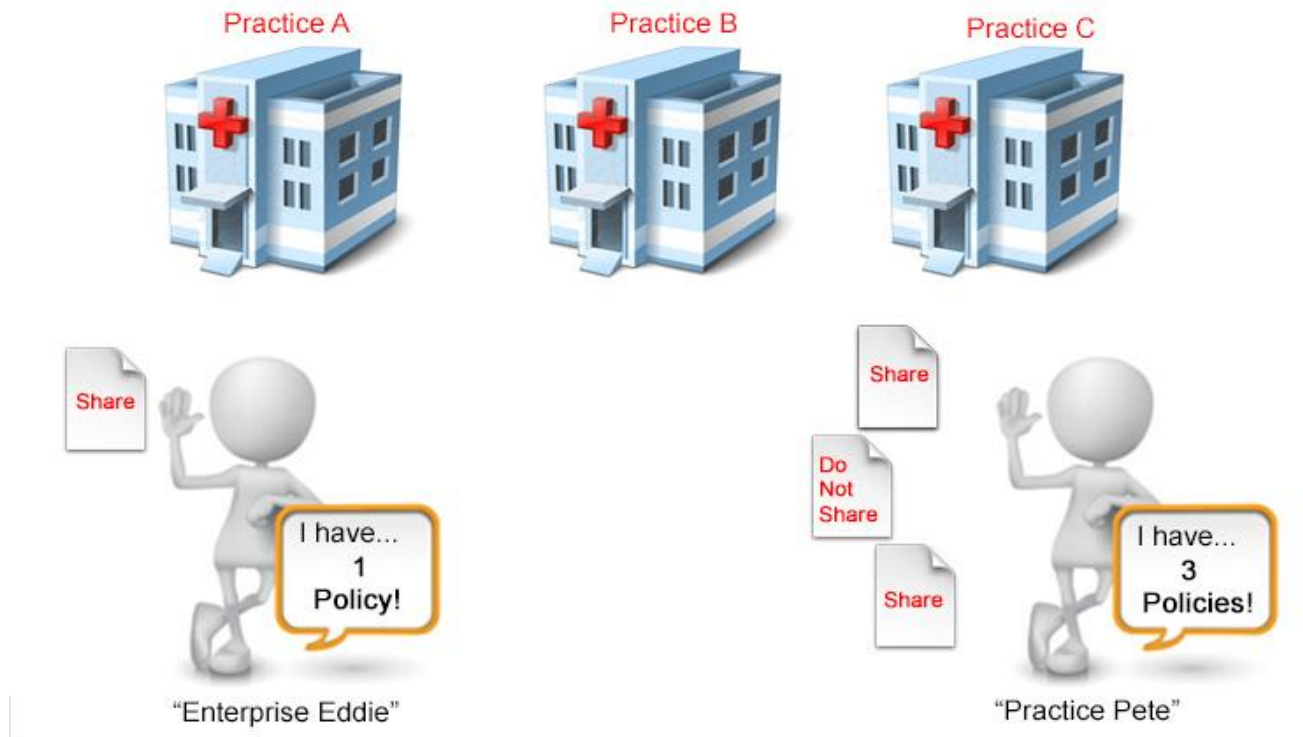
Enterprise Chart Rules

- Possible Scenarios
 - Practice Override
 - Patient defaults to the practice override (practice has override setup)
 - User enables Enterprise Chart in patient demographics
 - System prompts user: “Do Not Share” policy will be created for the Enterprise for that External System

Consent to Share PHI

Enterprise Chart Rules

- Enable Enterprise Chart with Practice Override



Consent to Share PHI

Enterprise Chart Rules

- Enable Enterprise Chart with Practice Override

The screenshot shows a patient record form with two main sections: Demographics and Contact Information. The Demographics section includes fields for Address (Billing/Secondary), Street 1 (123 West Coast Ave), Street 2, Address Type, City (Los Angeles), State (CA (California)), Zip (90012-), Country, County, Marital Status (Polygamous), Race (Declined To Specify), Religion, and Primary Care Provider. There are also checkboxes for Veteran, Smoker, and Enterprise Chart (checked). The Contact Information section includes a checkbox for Generate System Alert, a table for Contact Method, Number/Address, and Notifications, and a Preferred Contact dropdown menu.

An "Enterprise Chart" dialog box is overlaid on the form, containing the following text:

Enterprise Chart

This patient's chart is protected from sharing data in one or more practices. In order to enable Enterprise Chart for this patient, an enterprise level consent policy set to 'Do Not Share' will be saved to the patient's chart. Do you wish to continue?

Yes No

Consent to Share PHI

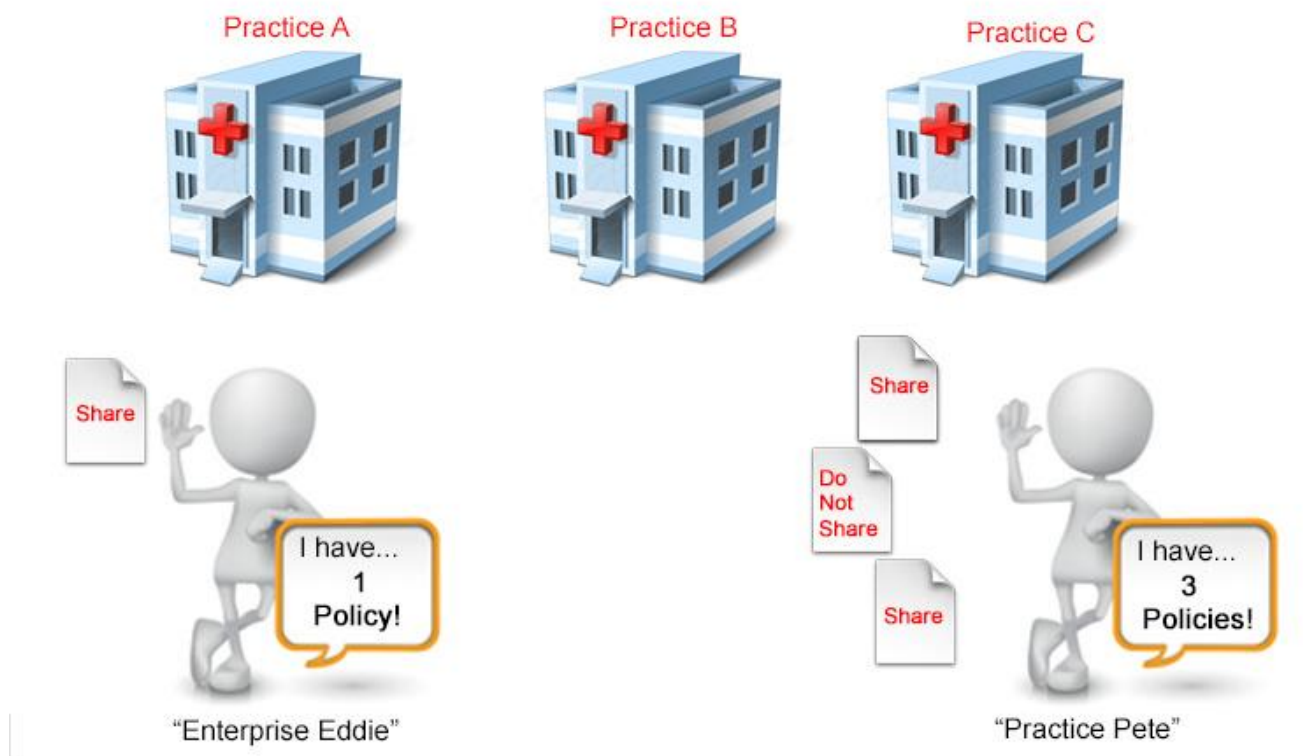
Enterprise Chart Rules

- Possible Scenarios
 - Patient Override
 - Patient is using patient override
 - User enables Enterprise Chart in patient demographics
 - System prompts user: Enterprise Chart cannot be enabled for this patient

Consent to Share PHI

Enterprise Chart Rules

- Enable Enterprise Chart with Patient Override



Consent to Share PHI

Enterprise Chart Rules

- Enable Enterprise Chart with Patient Override

The screenshot shows a 'Chart Details' form with several fields and checkboxes. A red box highlights an error dialog box that is overlaid on the form. The dialog box contains the following text:

Enterprise Chart cannot be enabled

Enterprise Chart cannot be enabled - patient has saved consent directives that are practice specific.

OK

The background form includes the following fields and options:

- Default Rendering Physician: [Dropdown]
- Default Referring Physician: Flower PhD, James [Dropdown]
- Print Statements
- Exempt from Outsourcing
- Chart UDF 1: sdfwe
- Chart UDF 2: [Text]
- Privacy Update: gwetw
- Marketing Plan: [Dropdown]
- Marketing Data: [Text]
- Marketing Comments: [Text]
- Load these user notes: [Text]
- Co-Managed Patient

A yellow sticky note in the top right corner of the form reads: 'Chart Detail Information is stored at the time the chart is created and is only available when a chart is created.'

Consent to Share PHI

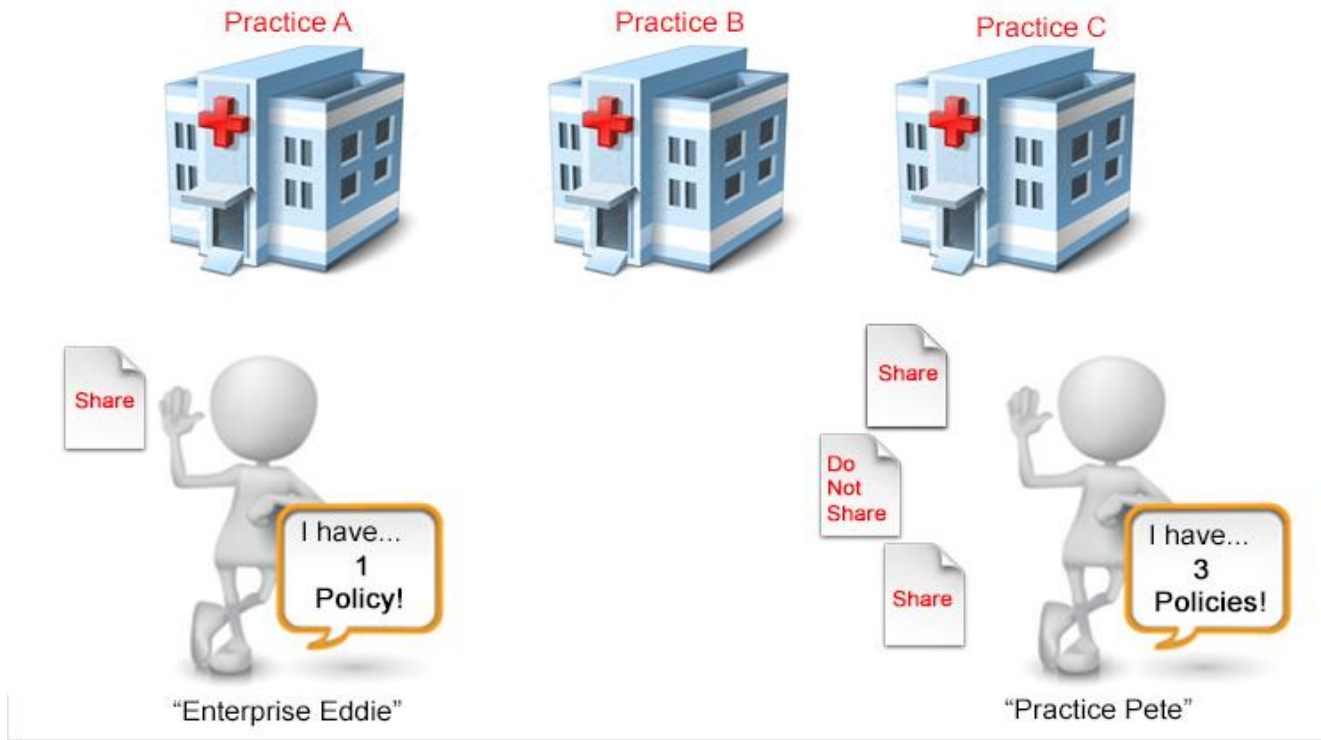
Enterprise Chart Rules

- Possible Scenarios
 - Disabling Enterprise Chart (at the patient level) when Consent Policies are already created
 - Enterprise Default
 - Patient is using enterprise default because no practice or patient override exists
 - User disables Enterprise Chart in patient demographics
 - Patient is now (still) using enterprise default

Consent to Share PHI

Enterprise Chart Rules

- Disable Enterprise Chart with Enterprise Default



Consent to Share PHI

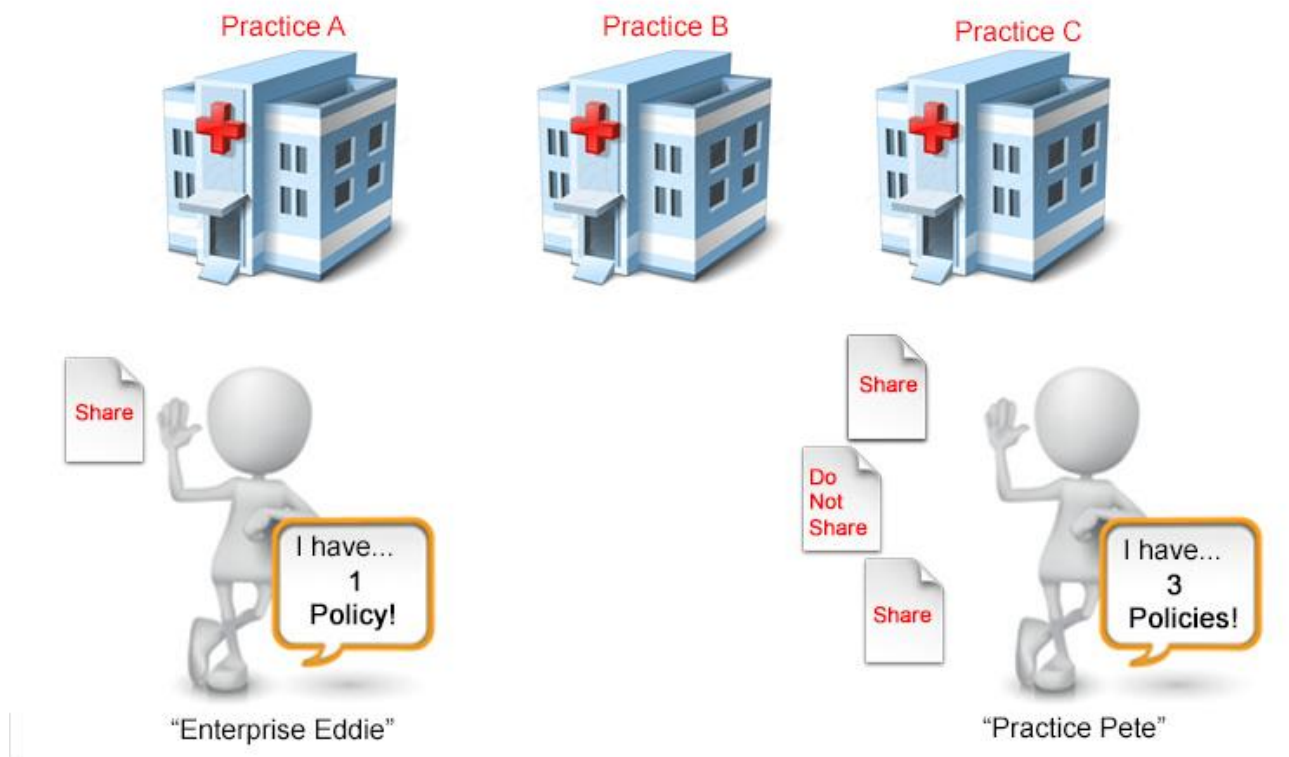
Enterprise Chart Rules

- Possible Scenarios
 - Practice Override
 - Patient defaults to enterprise default
 - User disables Enterprise Chart in patient demographics
 - Patient is now defaulting to the practice overrides for each practice

Consent to Share PHI

Enterprise Chart Rules

- Disable Enterprise Chart with Practice Override



Consent to Share PHI

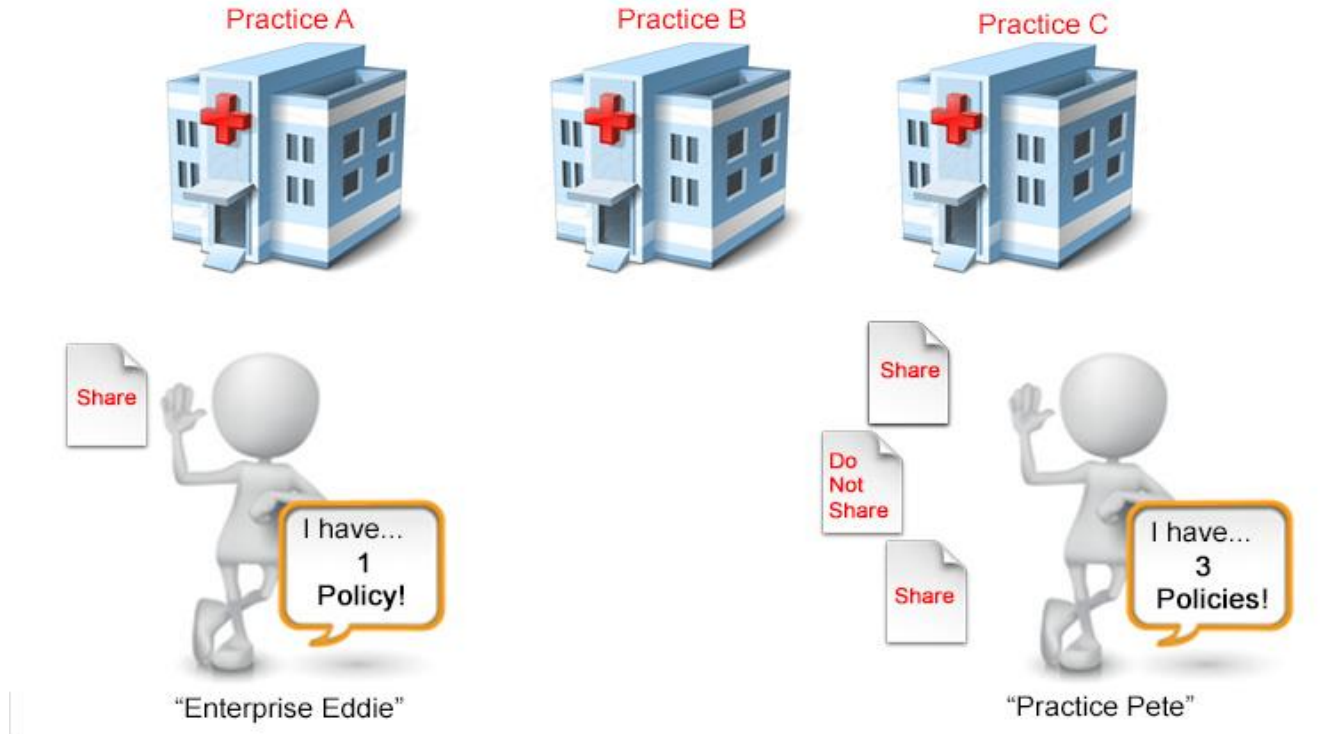
Enterprise Chart Rules

- Possible Scenarios
 - Patient Override
 - Patient is using patient override
 - User disables Enterprise Chart in patient demographics
 - Patient will now have separate overrides – one for each practice

Consent to Share PHI

Enterprise Chart Rules

- Disable Enterprise Chart with Patient Override



Consent to Share PHI

Medical Summary Utility

- External System will not display in Destination list if patient does not share with that specific External System

The screenshot displays the 'Medical Summary' application window. At the top, it shows patient details for '39_female Test (F)' with Person #: 554, SSN, Address: Sdsdsa, Schenectady, NY 12345, and Contact information. Below this, there are 'Export' and 'Import' tabs. The 'Clinical Information' section lists several encounters with dates and descriptions. The 'Destination' section contains fields for 'General Export Information' including Title, Referral Reason, On Behalf Of, CQM Responsible Provider, Confidentiality Code (set to 'Normal Sharing'), Practice Code (set to 'General Medicine'), and C-DA Document Type (set to 'CCD'). The 'Destination/Endpoint' dropdown menu is open, showing options: 'NextGen Share', 'NextGen Share', 'Export To File', and 'NextGen Patient Portal'. The 'NextGen Share' options are highlighted with a red box. At the bottom, there is a 'Preview' button.

Consent to Share PHI

Additional Information

- Consent options for other products that are not connected to External Systems are separate from this Consent Module
 - eRX
 - Immunizations
 - Procedures

Thank You

