RHODE ISLAND HIE

Consent Tool Guide

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CRISP Shared Services

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1. Introduction and Overview

1.1 What is the Consent Tool?

The Consent Tool is a feature in the Rhode Island Health Information Exchange (HIE) Portal (and also accessible through the InContext app in your EHR) that allows providers and staff to register a patient's consent to share sensitive health data—especially information protected under **42 CFR Part 2**, which covers substance use disorder (SUD) treatment.

Originally designed to support this specific type of consent, the tool has expanded to include other scenarios where patients need to opt in to sharing additional types of health data through the HIE. With a few simple steps, providers can document, manage, or deactivate consents directly within the patient's record.

1.2 Purpose of the Consent Tool

- The Consent Tool is designed as a platform for providers and staff to register patient consents and share 42 CFR Part 2 protected data. Additionally, the Consent Tool covers 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 42 CFR Part 2-covered provider to share information about their SUD treatment, payment and operations via Rhode Island HIE.
  - Rhode Island HIE will then share it with other members of the patient's health care team who participate with CRISP HIEs.
    - These include Maryland, DC, West Virginia, Connecticut, Alaska, Virginia, Rhode Island, and any HIE affiliates in the future.

1.3 Who can use the Consent Tool?

The Consent Tool is intended for any provider, care coordinator, or credentialed staff member who needs to:

- Document patient's consent to share SUD-related data.
- Register consent already obtained outside of the HIE.
- Support patient understanding of what they agree to share.
- Ensure compliance with federal rules for sensitive health information.

Both clinical and administrative users play a role in managing patient consents, and this tool is built to support both workflows—whether during in-person visits, telehealth sessions, or outreach efforts.

1.4 Where can you find it?

The Consent Tool can be launched in two ways:



Through the Rhode Island HIE Portal: Search for your patient, then select the square app icon next to the Consent Tool.



Through Single Sign-On (SSO) in your EHR: Launch the InContext app, then select the Consent Tool tab on the left-hand side. The tool will open in a new browser tab.

1.5 Key features

The Consent Tool allows users to:

- Register a patient's 42 CFR Part 2 consent in real time.
- Attest to and document consents already collected on paper.
- Support in-person or telehealth-based registration.
- Set and update expiration dates or revoke consent as needed.
- Capture electronic signatures from patients and/or legal representatives.
- View consent history and print records.
- Deactivate a consent when a patient revokes or changes their decision.
- Easily identify patients with 42 CFR Part 2 data via a visual icon in the Rhode Island HIE Portal (orange "i").

1.6 What problems does it solve?

Sensitive health information, like SUD treatment data, has extra legal protection under federal law. The Consent Tool helps solve several challenges:

- Ensures consent is captured and stored in a consistent, compliant way.
- Eliminates the need to fax or manually scan signed forms.
- Supports coordination of care by making this data accessible to authorized providers.
- Reduces delays caused by missing or unverified consents.
- Helps providers meet legal obligations while keeping patients informed.

2. Registering Consent: Step-By-Step Guidance

2.1 Registering Consent Already on File

- If the consent has been captured outside of the Rhode Island HIE Portal, 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.
- The providers/organizations are requested to keep the signed copy of the consent form on file. It is required by federal law to have a patient's signature to share the patient's SUD information available upon request.

2.2 Registering a Consent During In-Person Visit

- Providers search for their patients in Rhode Island HIE Portal or SSO in their EHR.
- After launching the Consent Tool, the provider explains the consent to their patient, educating them on what data they are sharing and with whom.
- Patient designates they wish to share "all SUD data".
- Patient (or parent/guardian) signs directly into 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.

2.3 Registering Consent via SSO (EHR Access)

Use this method if you're launching the InContext app within your EHR system.

1. Launch the Consent Tool from the InContext app in your EHR.

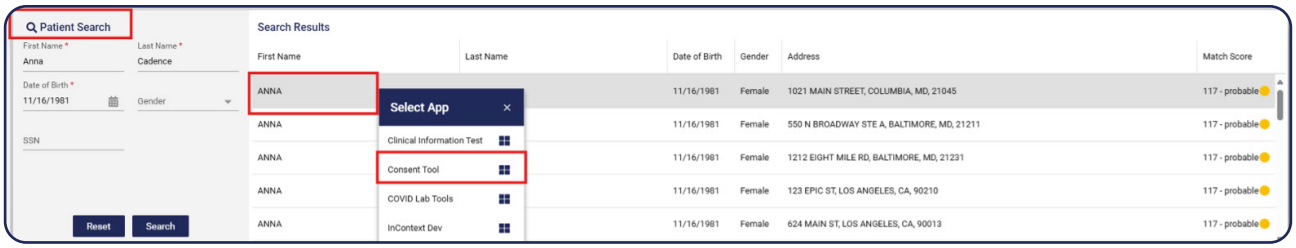


2. Click on the Consent Tool tab on the left-hand side of your screen.
3. The tool will open in a new window.
4. Follow the same steps you'd use in the Rhode Island HIE Portal to register the patient's consent (see below).

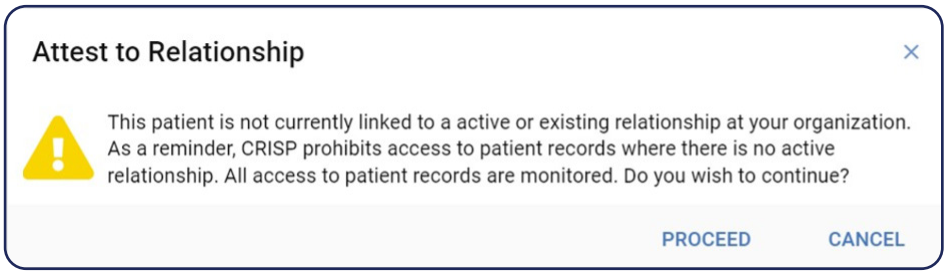
2.4 Registering Consent via the Rhode Island HIE Portal

Use this method if you're accessing the Rhode Island HIE Portal interface directly.

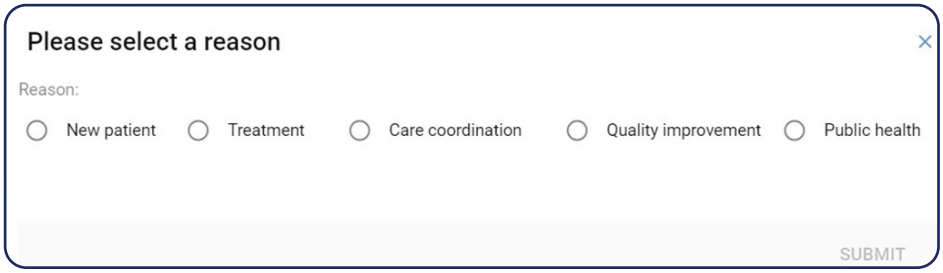
1. Launch the Rhode Island HIE Portal.
2. Enter the patient's name and date of birth into Patient Search.



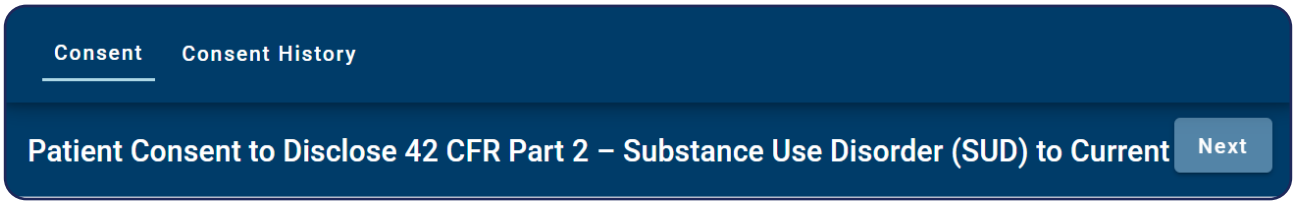
3. If you are registering consent for a new patient (one not currently on your existing panel panel), a "Attest to Relationship" prompt will appear.
4. Click 'Proceed' to continue.



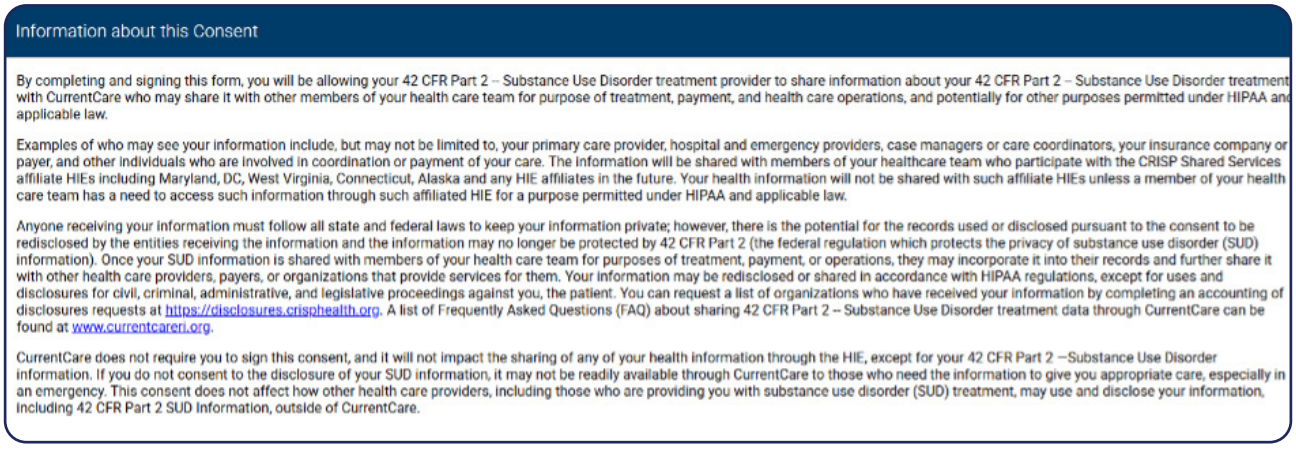
5. After clicking "Proceed", you must select a reason for searching for the patient. Please select the option that applies to you.



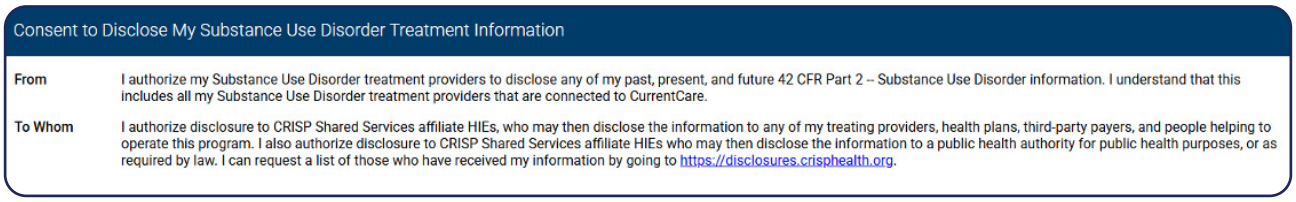
6. Select Part 2 Form



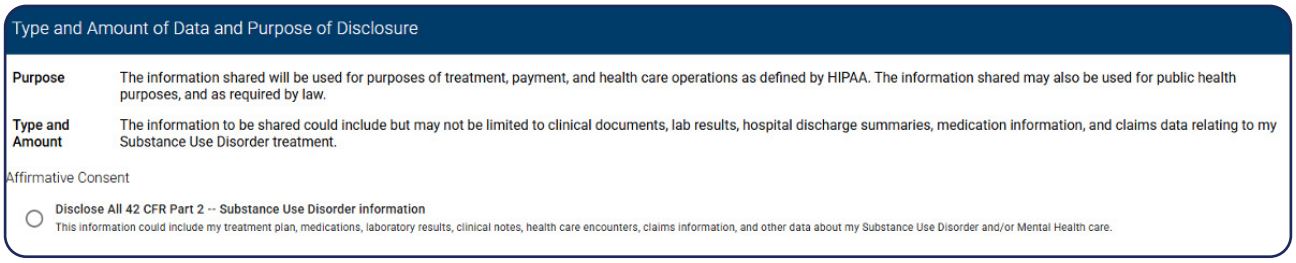
7. Review the Information Section with the patient. You may reference FAQs and disclosure details linked to the interface.



8. The provider must educate the patient about the health information being shared and who it will be shared with.

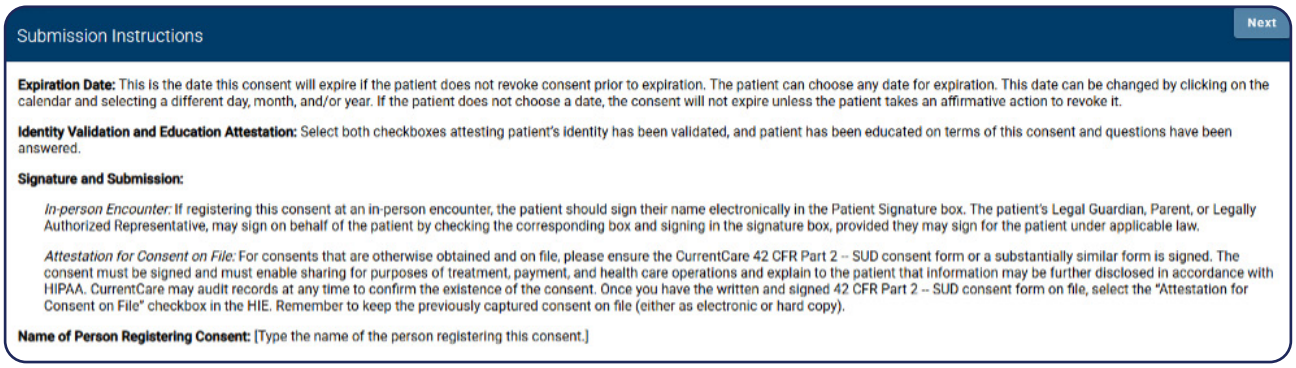


9. Confirm that the patient chooses to share all SUD information through this form.



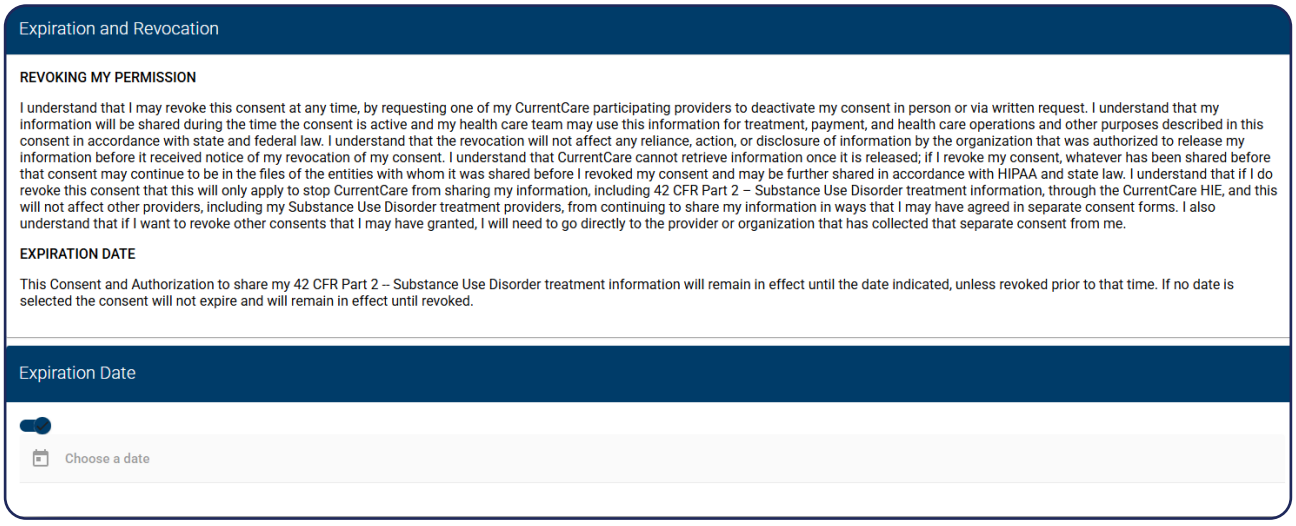
2. Registering Consent: Step-By-Step Guidance

10. Review the Submission Instructions to ensure the consent aligns with visit type (in-person or telehealth). 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 consent on file in the tool.

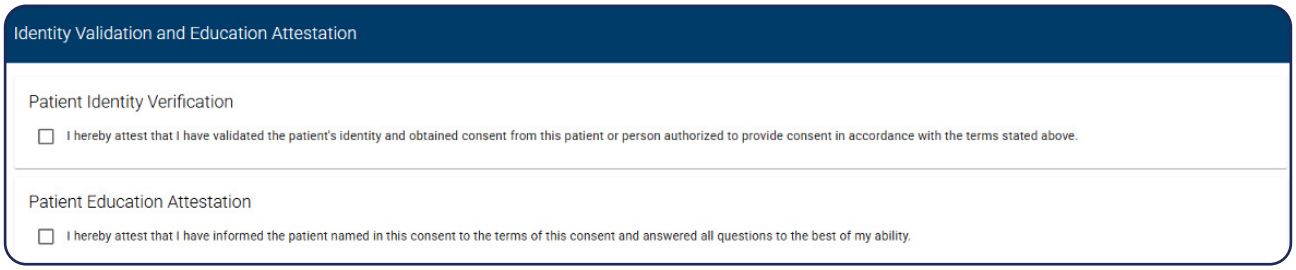


11. Discuss the revocation and expiration sections, explaining the process and result of revoking consent, which the patient may do at any time. Patients may also choose an expiration date for their consent.

- 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 based on your discussions with the patient.

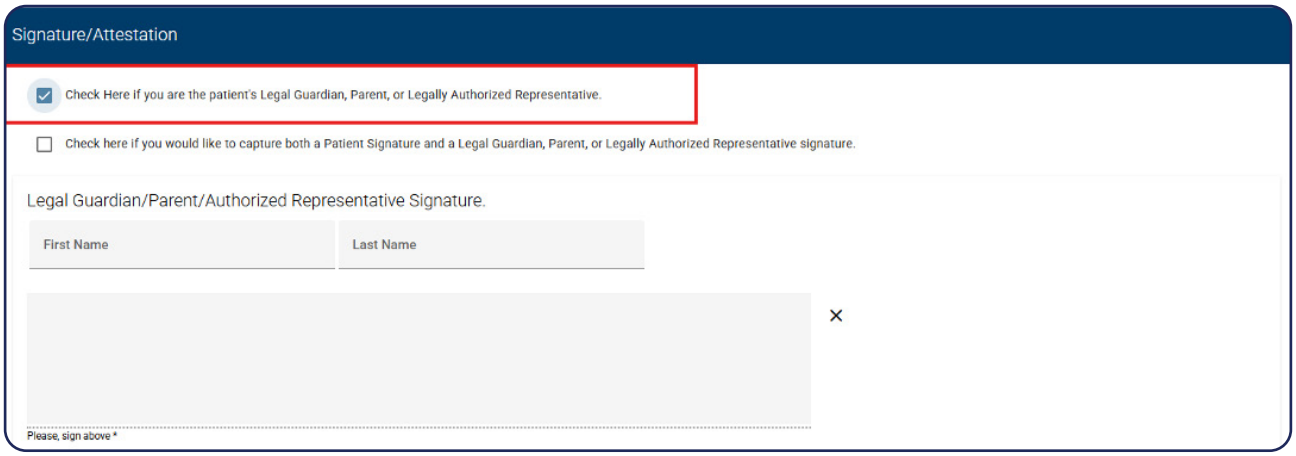


12. Complete the Provider Attestation, verifying the patient's identity and confirming you informed the patient of all terms of consent.



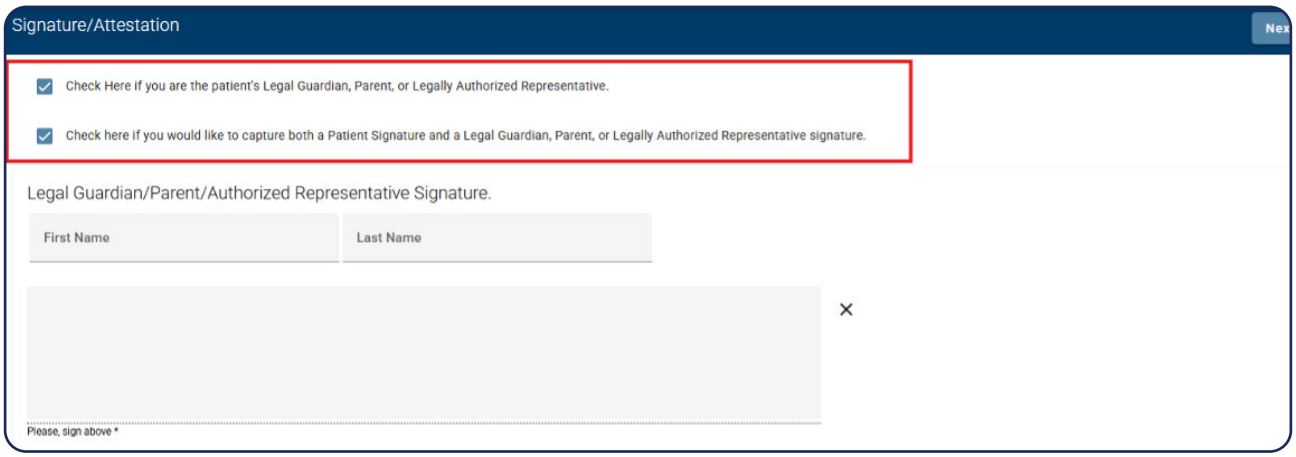
13. Complete the Signature Section:

- Legal guardian, parent, or legally authorized representative signature (as applicable).
- First checkbox is only required if the person signing the consent is the patient's legal guardian, parent, or legally authorized representative and has the legal authority to consent on the patient's behalf.
- If the first checkbox is checked, the provider must capture legal guardian, parent, or legally authorized representative First Name, Last Name, and electronic signature.

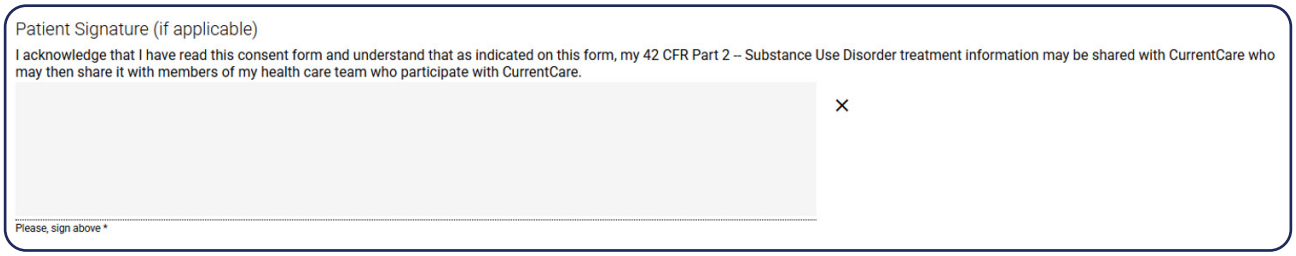


- If the second checkbox is checked, this means the patient would like to capture both patient and legal guardian, parent, then the patient's signature box will also appear for the patient to sign electronically.

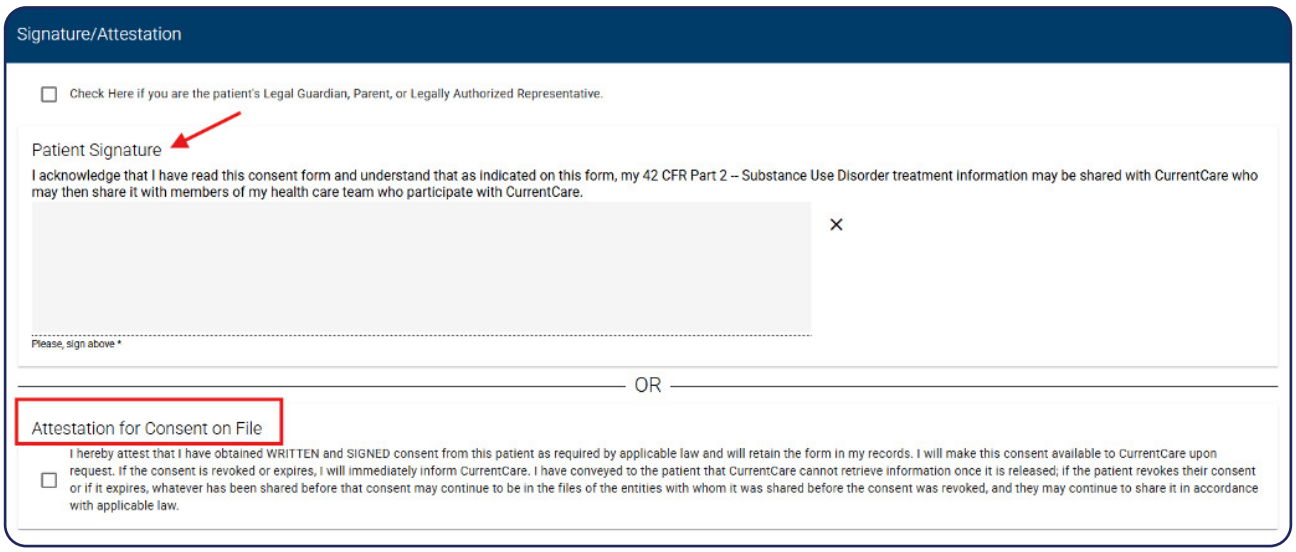
2. Registering Consent: Step-By-Step Guidance



- The patient must provide their signature if both checkboxes are checked.
- If in person, the patient signs electronically using their finger, mouse, stylus, or touchscreen.



- If registering a consent already on file, check the Attestation for Consent on File box. This checkbox confirms that provider has the original written and signed consent form as required by the law from the patient.

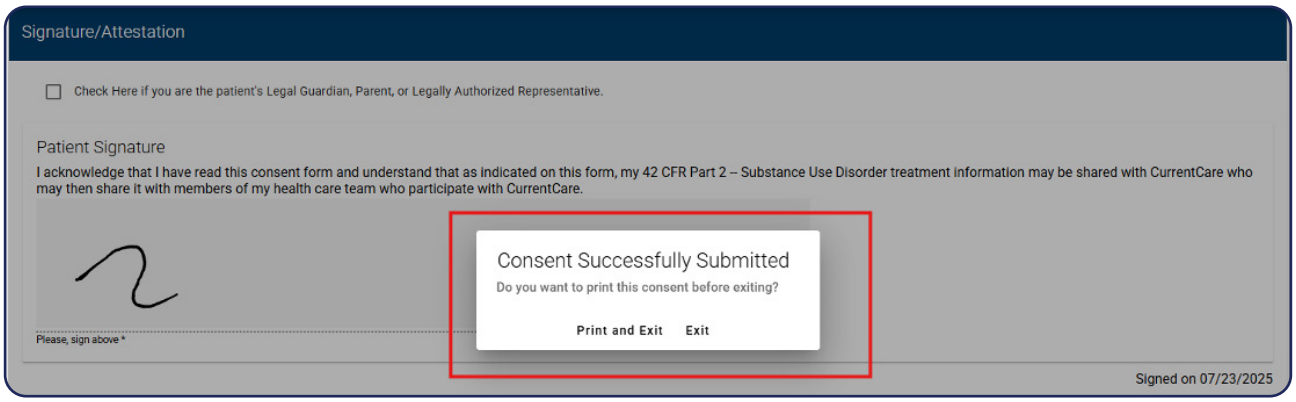


14. Enter the name of the staff member registering the consent.

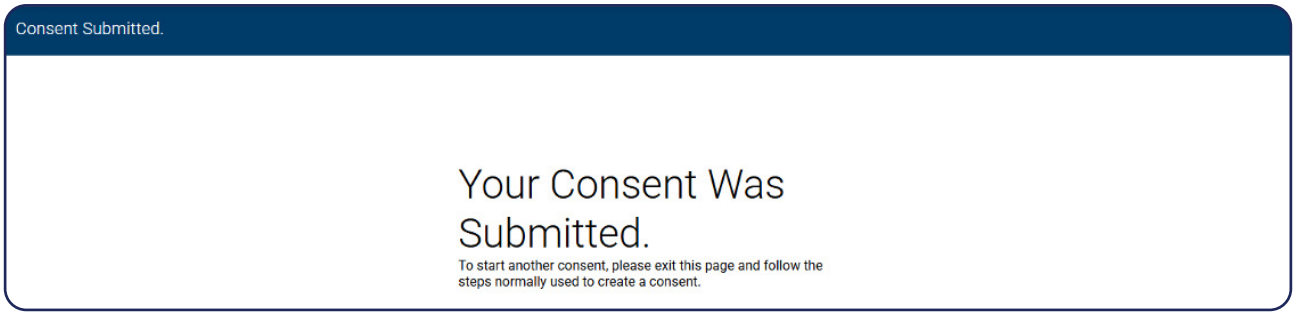
15. Click Submit once.



16. Choose Print and Exit or Exit to complete the process.



- If the user clicks on Exit, a Consent Submitted screen is displayed.

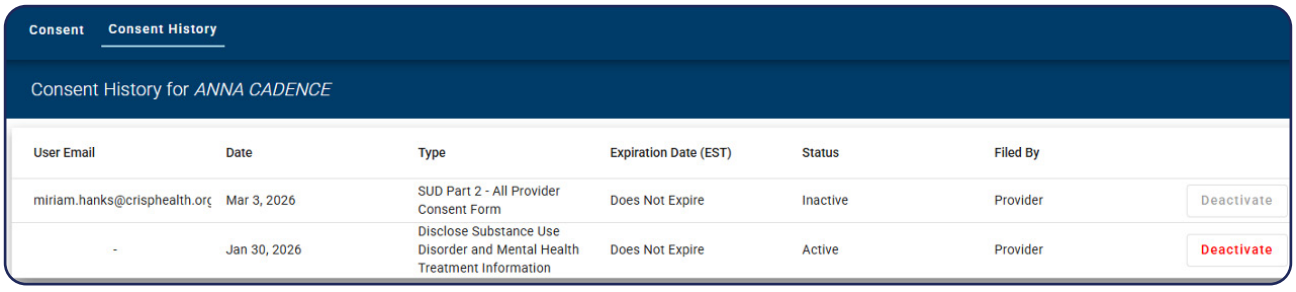


3. Additional Functions in the Consent Tool

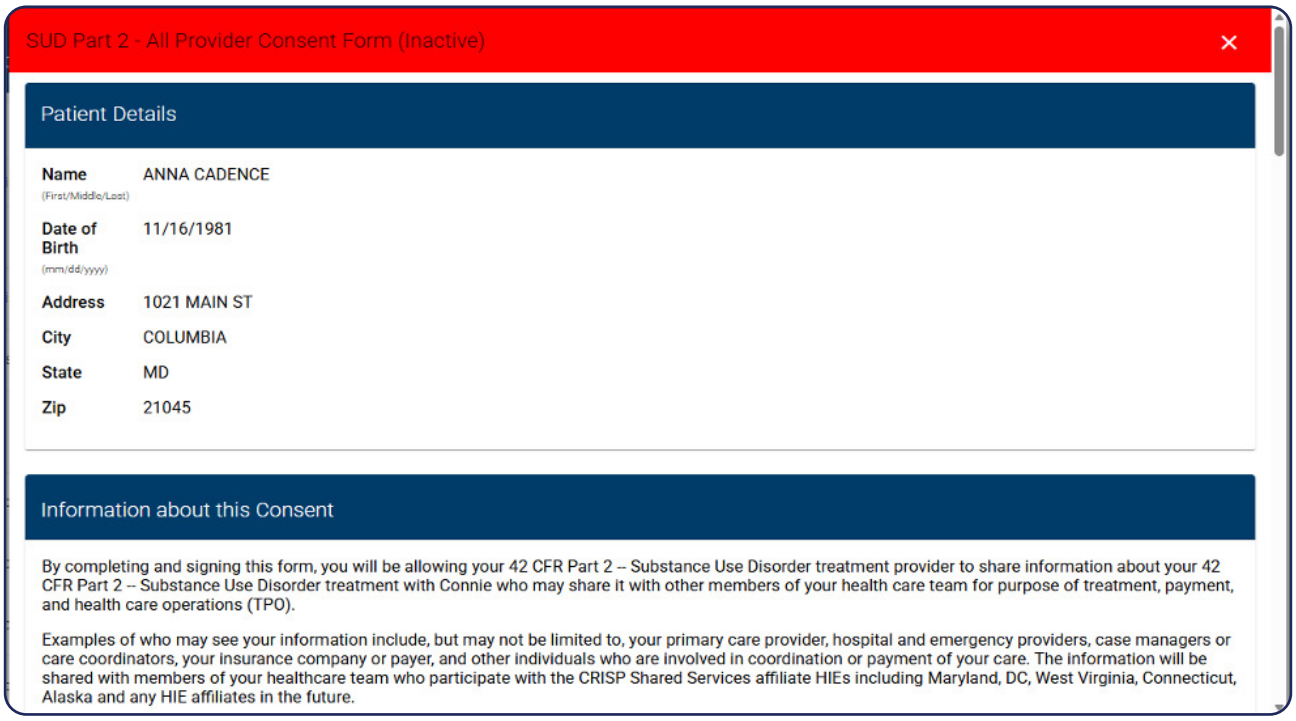
Beyond registering new consents, the tool includes features to help you manage existing consents over time. These functions support compliance, visibility, and patient autonomy, ensuring sensitive data is only shared when and how a patient has authorized.

3.1 Viewing Consent History

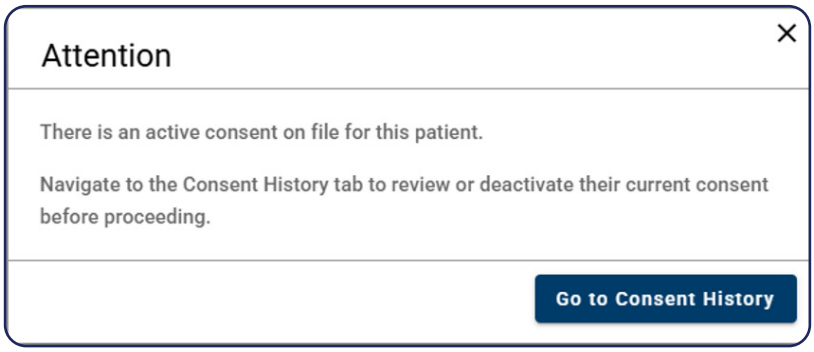
- Search for the patient and click Consent History.
- Click in any row to view the details of that registration.



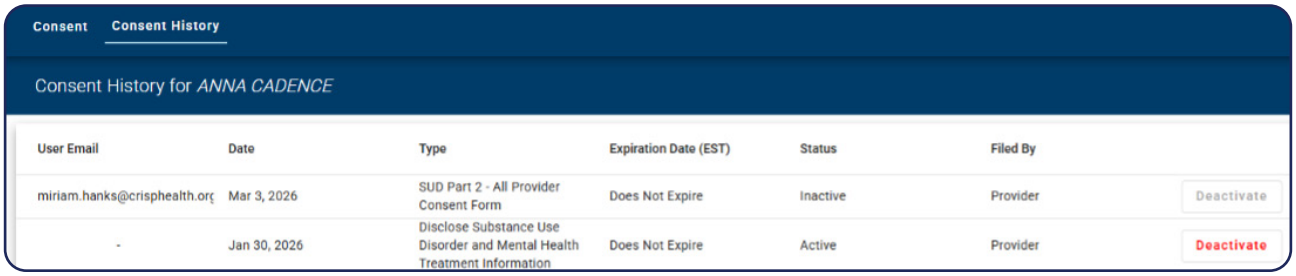
- A pop-up window will display consent details.



- If a patient already has an existing consent on file and the user navigates to open the consent to register, the UI will display a pop-up notification to educate the user that this patient already has an active consent on file.
- This prevents duplication of the same consent type for a patient.

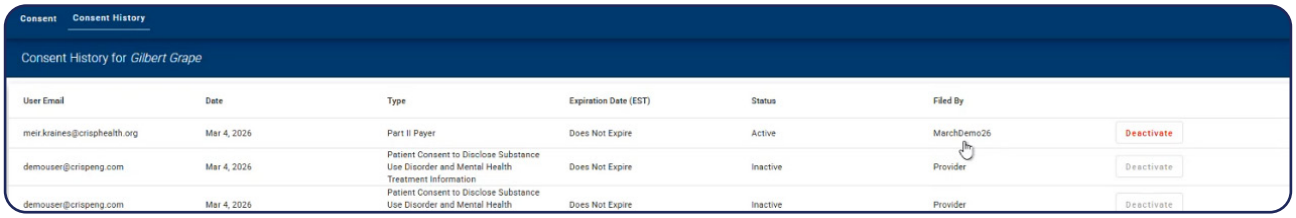


- If the user can click on the “Go to Consent History” the system will take them directly to the Consent History page.
- This allows the user to deactivate the existing consent and submit a new one.

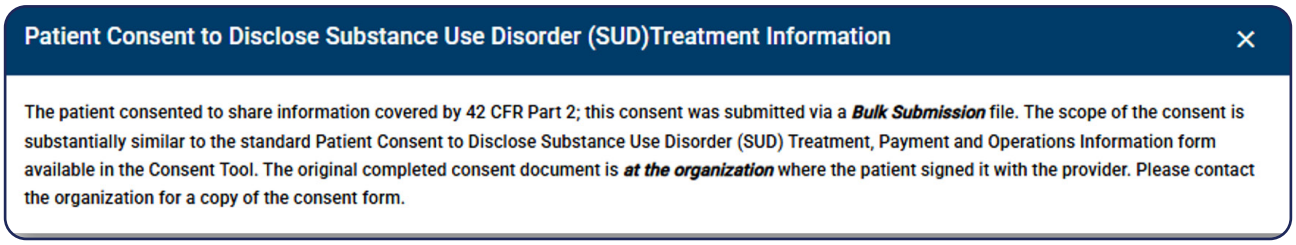


3.2 Bulk Consent

- Sites can submit bulk consent using a Master File Transfer solution.
- If the patient’s SUD Part 2 consent type received by CRISP Shared Services (CSS) via bulk import, then the existing consent will be deactivated in Consent History and the latest in time submitted consent SUD Part 2 will remain active.
- This prevents duplication of the same SUD Part2 consent type.

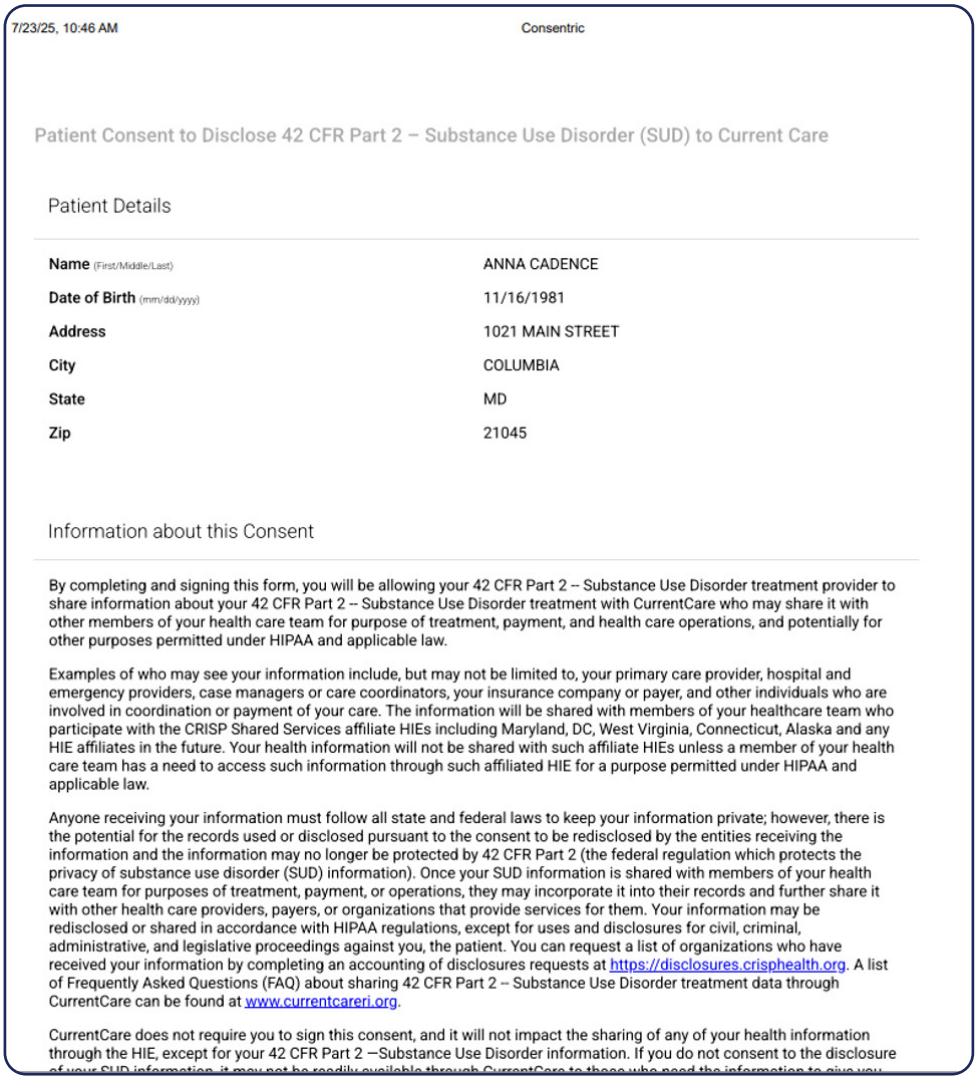


- Once the user clicks on the bulk imported SUD Part 2 consent form, a pop-up screen will display the user's notification.



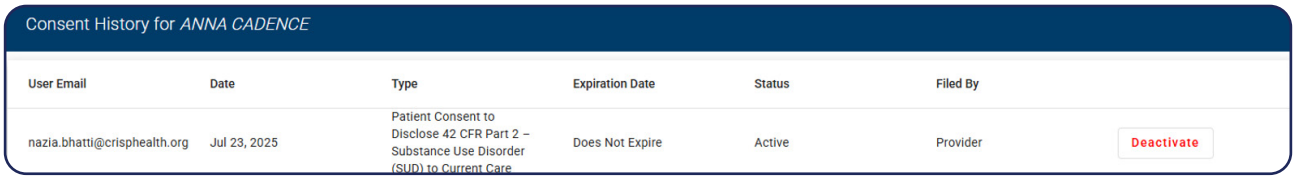
3.3 Printing a Consent

- Open the patient's consent from Consent History.
- Scroll to the bottom and click Print.
- A print preview will allow you to print or save the file.



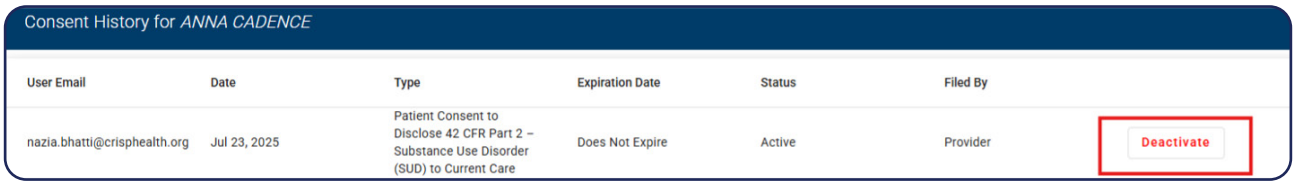
3.4 History of Patient Consent Form(s)

The Consent Tool allows the users to view the patient's historical consent forms from the "Consent History" page. This page will have the columns to display User Email, Date, Type, Expiration Date, Status, Filed By and a Deactivate action.

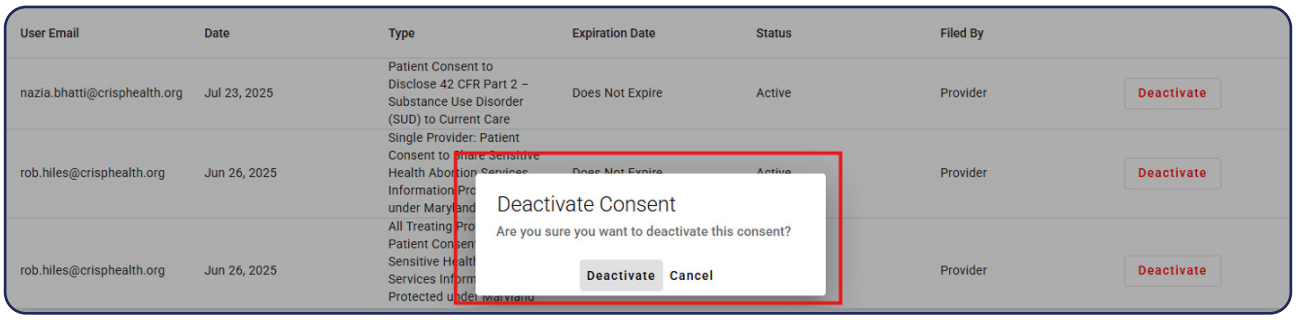


Deactivating a Consent

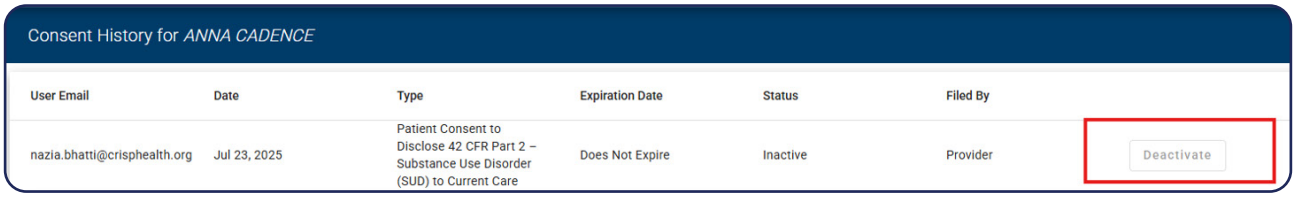
- From the Consent History, locate the active consent.



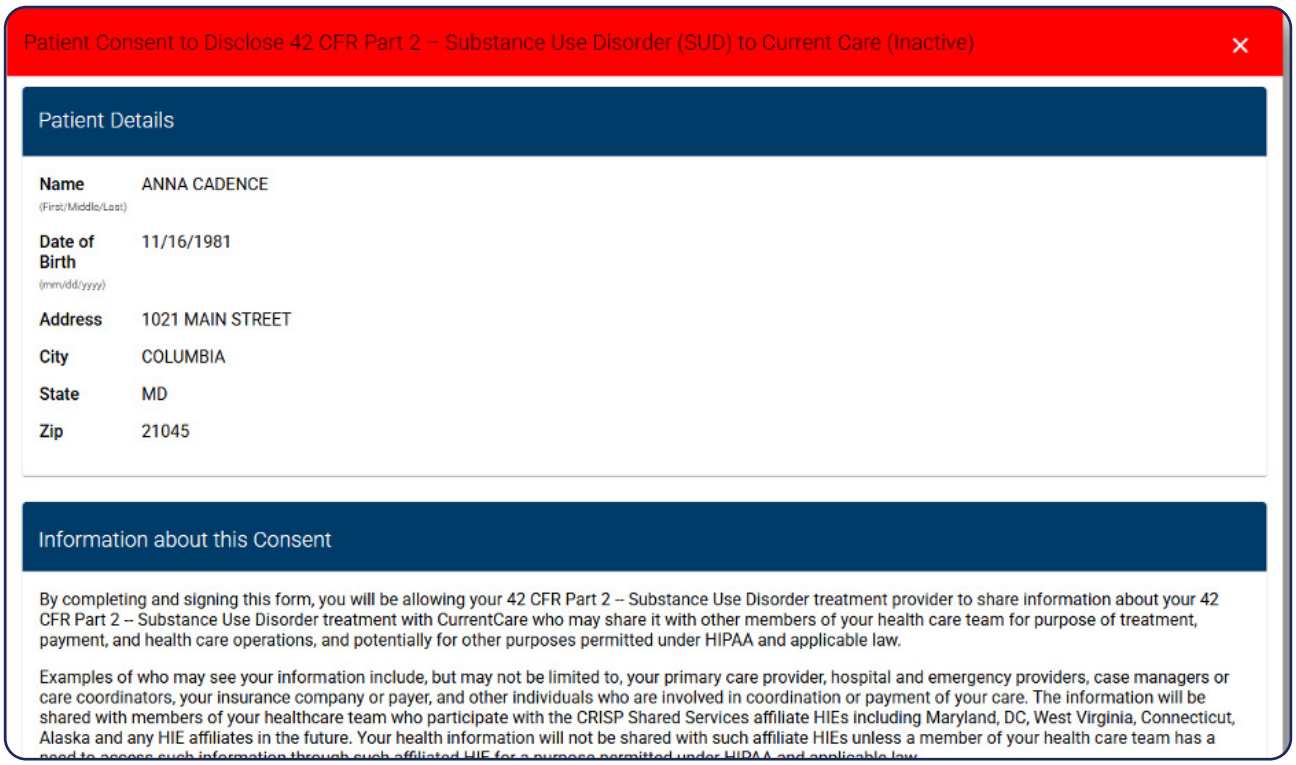
- If the patient wishes to revoke their consent and no longer share their health information data to all the HIEs, the provider can click on Deactivate, then confirm on the prompt.



- If the action was to click on Deactivate, then the Consent Tool will revoke the patient's consent in real time and the Deactivate button will be grayed out.

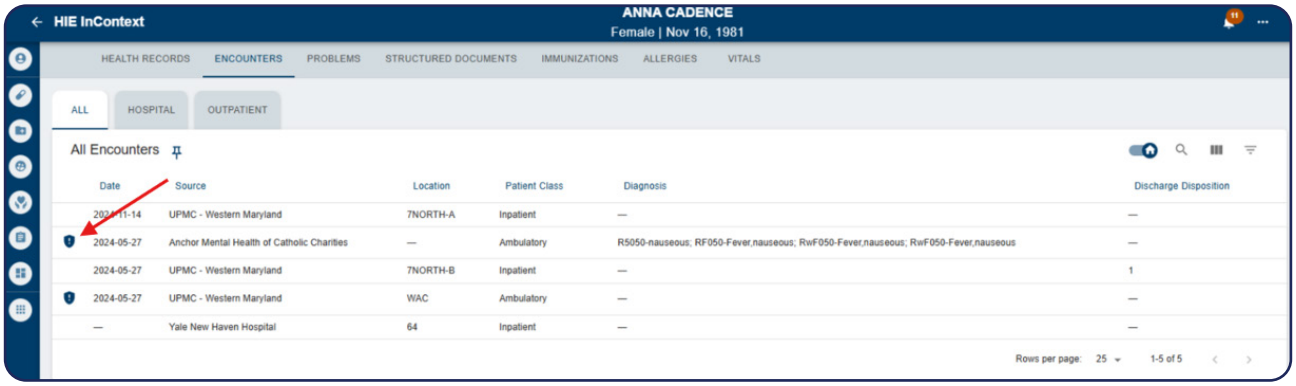


- If the provider opens the Deactivated form, the form will state at the very top in red highlight ‘(Inactive).



3.5 Identifying SUD Data in the HIE

- Once consent is submitted, any SUD data covered under 42 CFR Part 2 will be marked with a blue “i” icon in the Rhode Island HIE Portal.
- This icon helps providers distinguish sensitive data at a glance within the patient’s broader clinical record.



3. Additional Functions in the Consent Tool

- Once the user hovers over, a fly-out message will display for the providers to understand there is consent on file and this health record contains sensitive health information.

> 42 CFR part 2 prohibits unauthorized use or disclosure of these record(s) or information. The scope of the consent provided includes purposes of treatment, payment, or operations; a copy of the consent or a substantially similar consent can be found by navigating to the Consent Tool. If you do not have access to the Consent Tool, contact User Support.
>
> This data is protected pursuant to Md. Health. Gen. § 4-302.5. It is being provided to you based on express consent of the patient.

RHODE ISLAND HIE



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Revision History		
Version Number	**Date**	**Summary of Change**
1.0	October 2026	Initial Version

CRISP
Shared Services