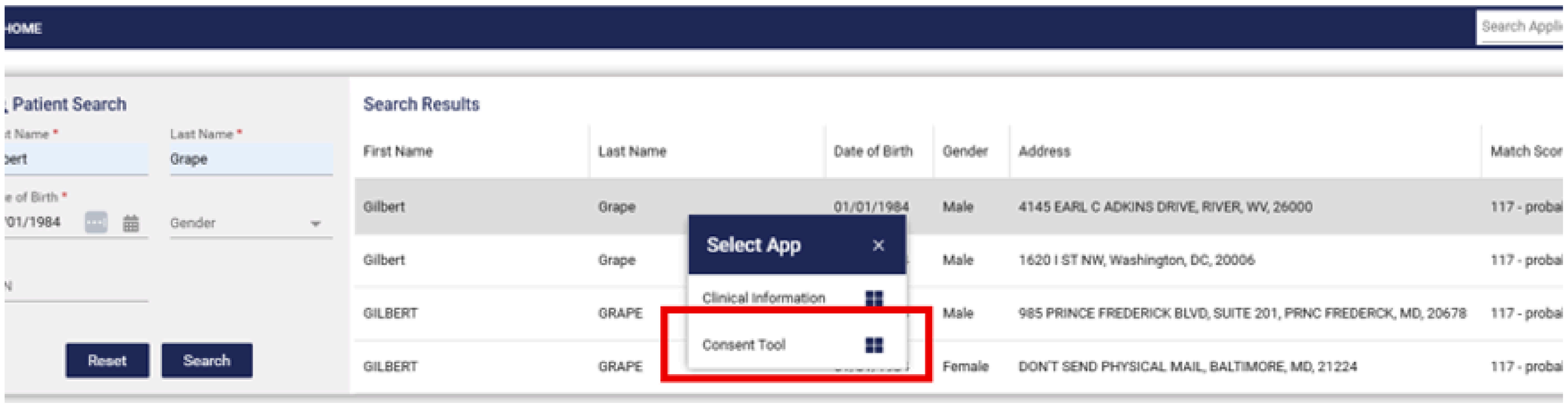
Consent Tool Workflow: Capturing Consent Digitally

This step-by-step guide explains the workflow for capturing a patient's 42 CFR Part 2 consent and signature electronically during an in-person visit.

Step 1: Locate the patient

- Search for the patient in the Rhode Island HIE Portal or from your EHR and select the Consent Tool.

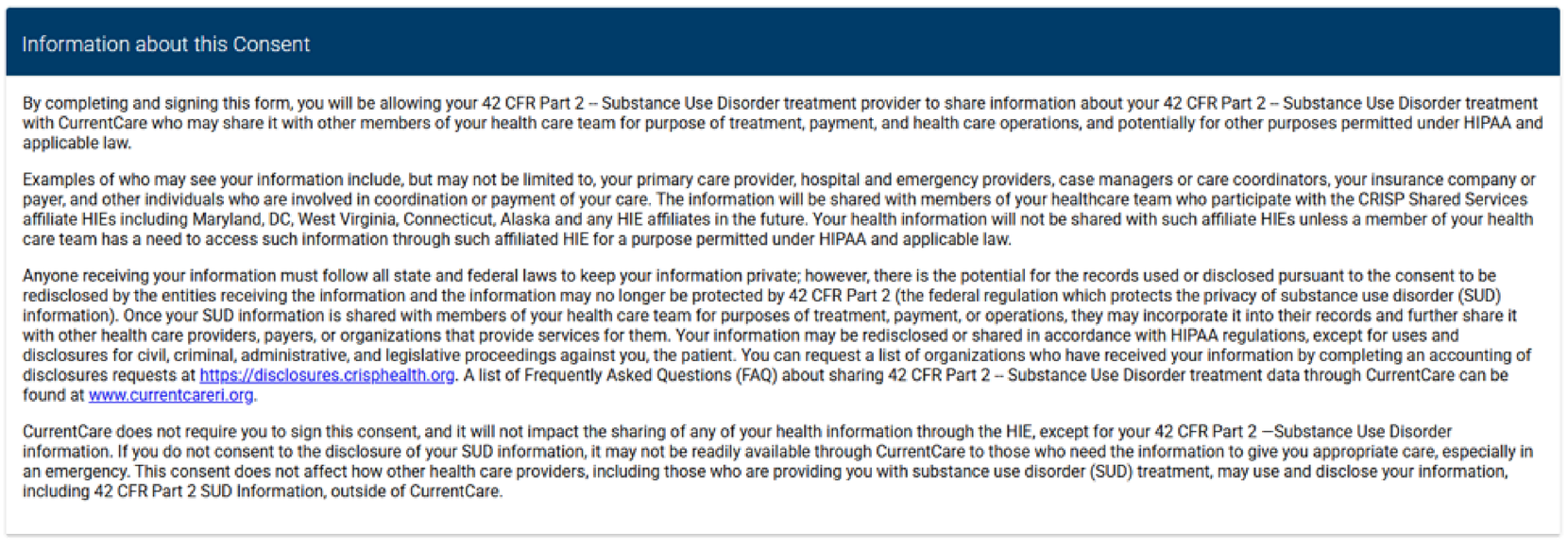


Step 2: Review Consent Information

- Check the patient details to ensure you have selected the correct patient.

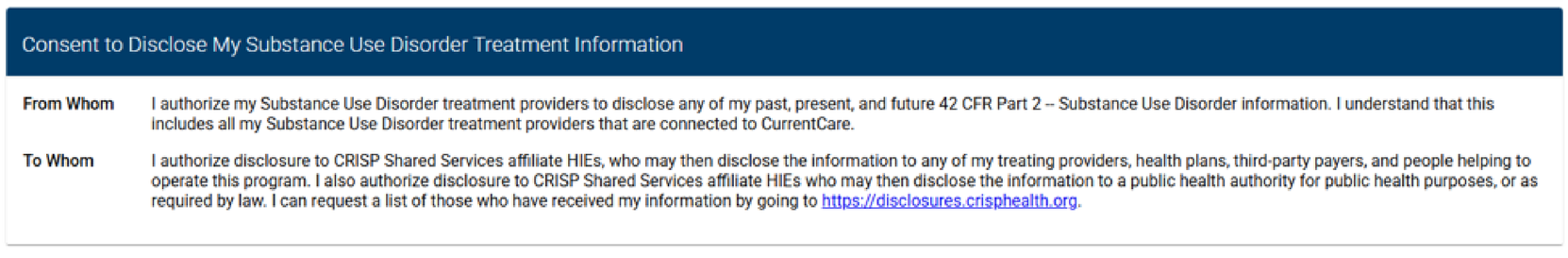


Step 3: Review the "Information about this Consent" with the patient



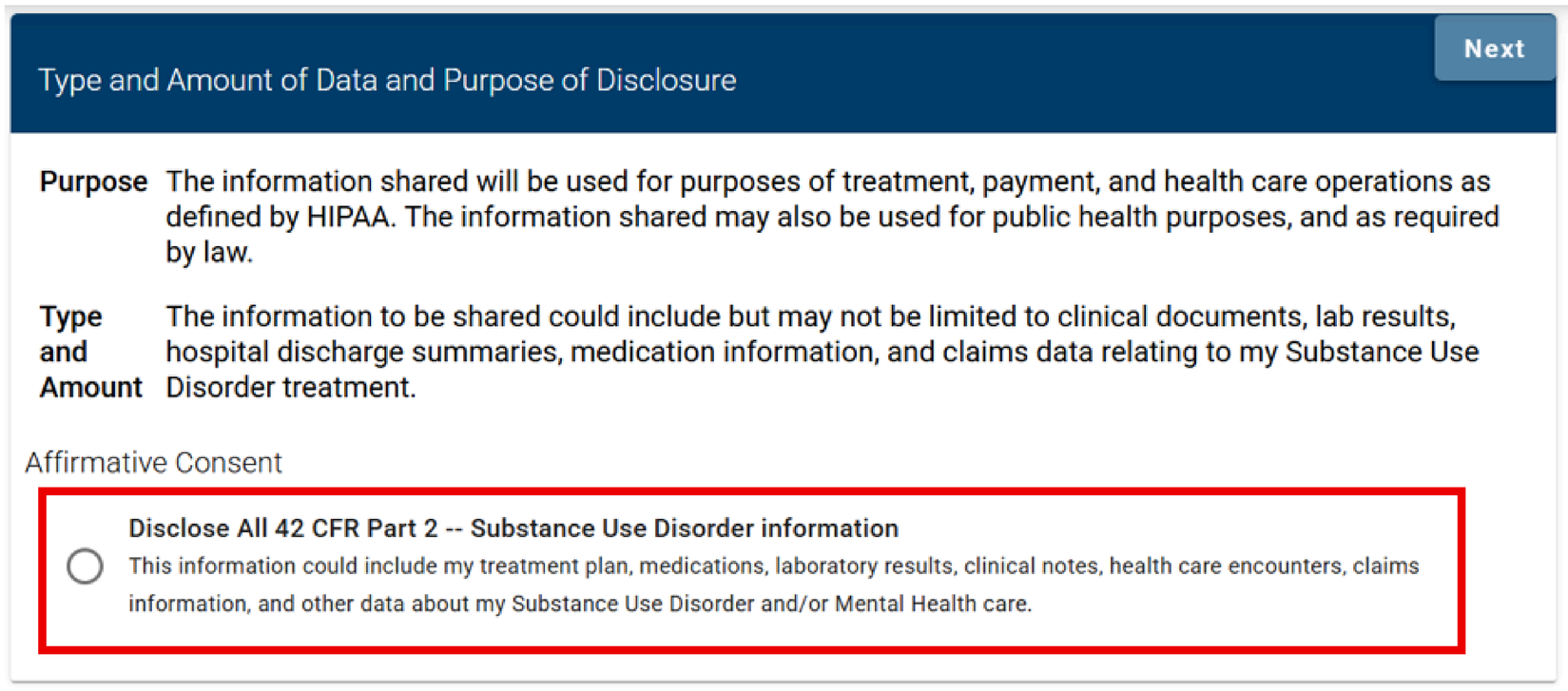
Step 4: Review the "Consent to Disclose My Substance Use Disorder Treatment Information"

- Explain what information may be shared and who may access it through participating HIEs.



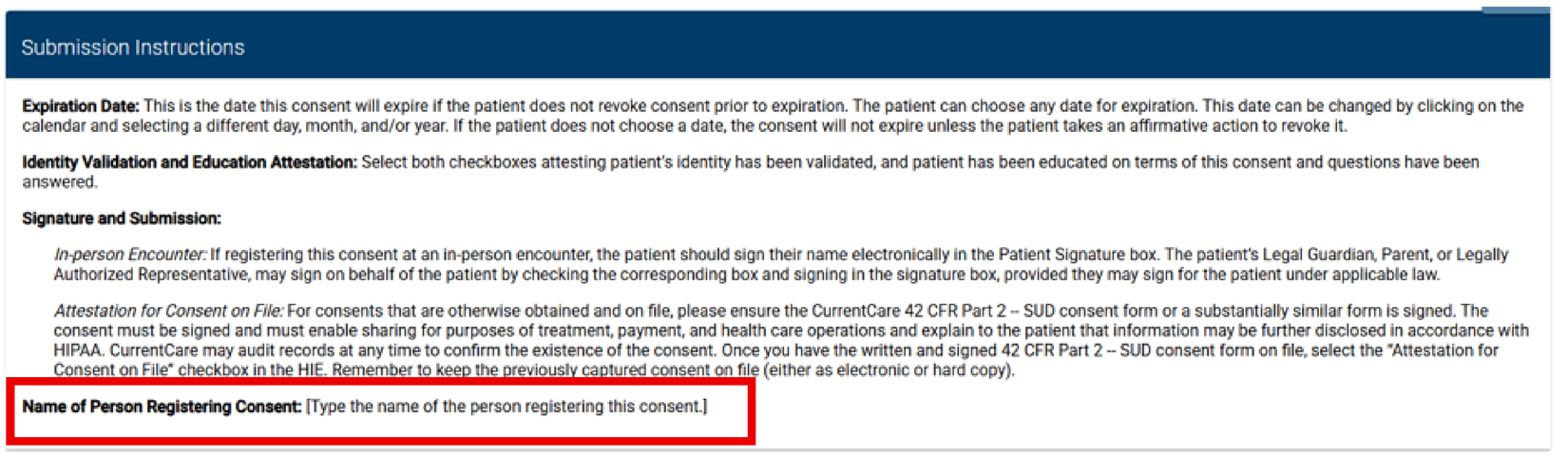
Step 5: Review the "Type and Amount of Data and Purpose of Disclosure"

- Check the button under "Affirmative Consent" to agree to disclose all 42 CFR Part 2 Substance Use Disorder Information (this single consent will allow disclosure of all SUD treatment records from all providers the patient receives SUD treatment from).



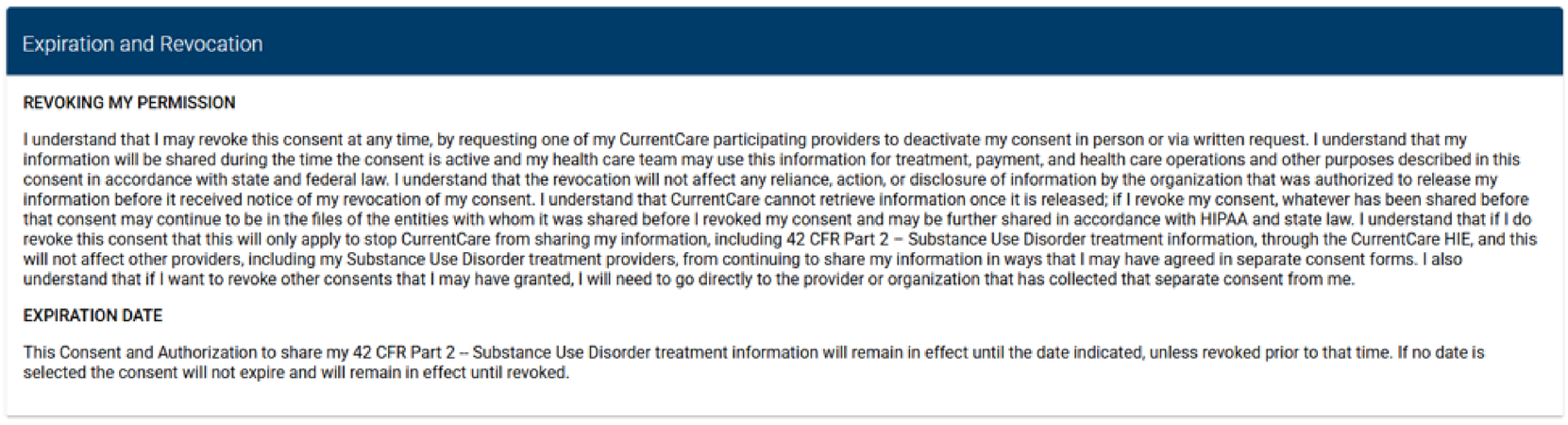
Step 6: Review the Submission Instructions

- The provider enters their name where requested.



Step 7: Expiration Date and Revoking Consent

- Explain the patient's choice to either select an expiration date for this consent or to leave it open-ended, and their right to revoke consent at any time.



- If the expiration date has been set to "Does Not Expire" the blue button will be toggled "on."

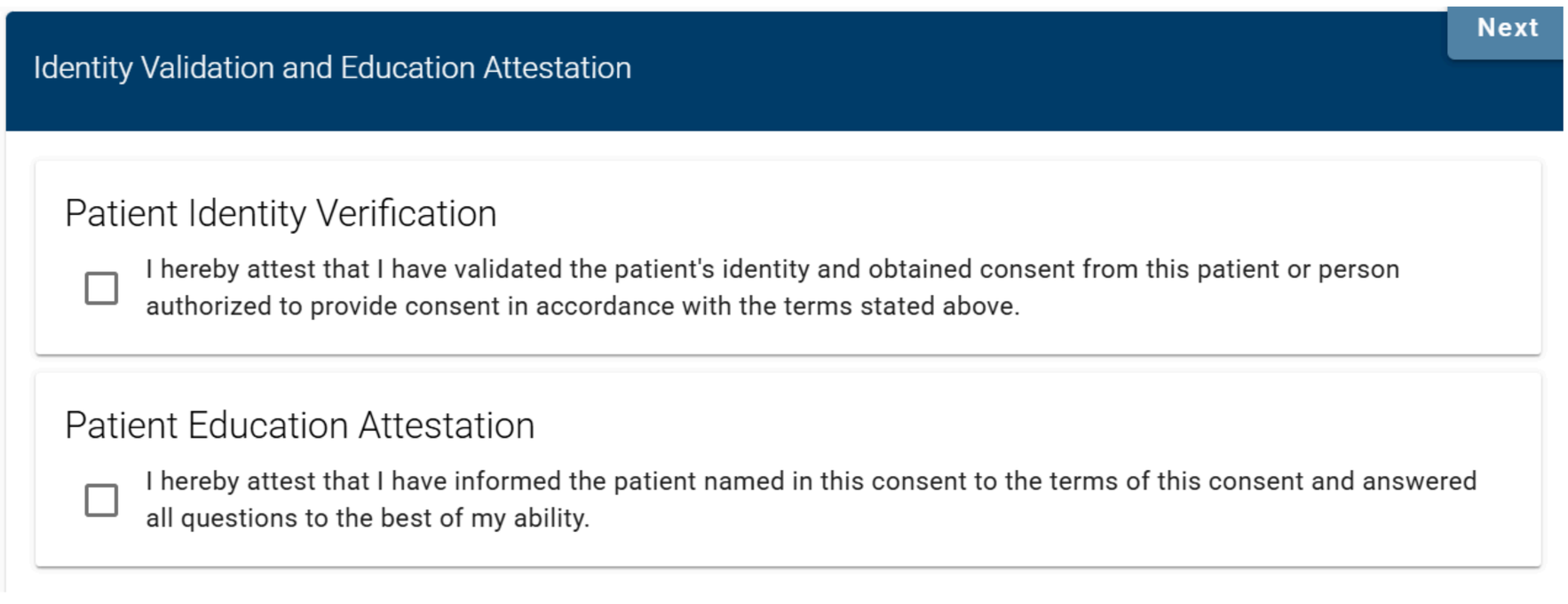


- To select an expiration date, toggle the blue button "off" and enter the patient's selected expiration date in the box.



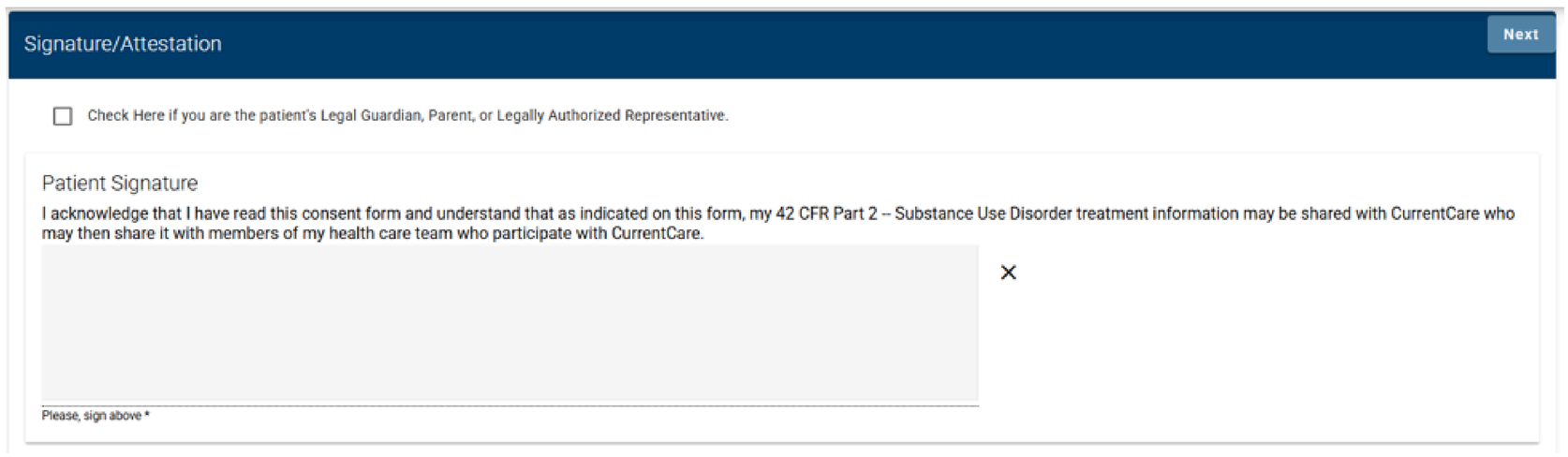
Step 8: Ensure Patient Understanding

- Answer any questions the patient may have before registering the consent.
- Check both boxes under "Identity Validation and Education Attestation"



Step 9: Capture the Patient's Signature

- The patient or their legal representative signs the form.
- If the form is being signed by a legal representative, check the box above the signature line.



Once completed, the registered consent will appear in the Consent Tool under "Consent History"

- If a patient requests to revoke their consent, this can be done by clicking "Deactivate."
- Consent deactivation can be done by any provider involved in the patient's care.

