TOP 10 QUESTIONS FOR HIM REGARDING ROI, WEBSITE & EMAIL (AVENUES Version)

QUESTION	ANSWER
How do I create an authorization?	In the patient file, from the console of your choice, click on the **Consent List** button. Choose the template you wish to create.
RECIPROCAL AUTHORIZATION:	Click the **Add Authorization** button (or **Add Referral Source Authorization** button if this applicable to your need) **Reciprocal** is used for all “to/from” interactions and captures our need to send out documents. You will need to complete the sections titled “To be released to/from” and “Purpose of Disclosure”. **DO INCLUDE full CORRECT name, address, suite number, zip code, fax, and phone number (*as applicable to meet the need of Communication vs. Document release.)*** **If you do not have the full information, wait to create the authorization until you do. *(HIM cannot send any document anywhere to just a phone number or a City name.)* Also, be sure to list organization/relationship for referral source and family members.** **CHOOSE AN ACTION: Communication vs. Document** **(you must select something under either category or the form is VOID!)** **Communication: IF you are going to be talking** to the person/facility listed on the authorization, click on the type of items that will be discussed as the patient allows. **Documents: IF the patient needs us to send out paper documents t**o the person/facility listed on the authorization, click on the type of document that the patient allows us to release.
FINANCIAL AUTHORIZATION:	Click the **Add Financial** button **Financial** is only for the business office use (for billing purposes) You will need to complete the section titled “To be released to/from” **DO INCLUDE full CORRECT name, address, suite number, zip code, fax, and phone number**
EXTERNAL AUTHORIZATION:	Click the **Add External** button **External** is typically only used by nursing/medical to RETRIEVE records from another center; NO VERBAL, no reciprocal exchange. You will need to complete the sections titled “To be released to/from”, “Purpose of Disclosure”. You must record a “Date Range for request”. Select only the documents you need at this time by clicking on the document type.

, QUESTION	ANSWER
NOTE: By creating the Authorization Template (Reciprocal, Financial, External), you have ONLY created a tool to print the authorization. The patient MUST sign the printed authorization for it to be valid. THIS TEMPLATE IS NOT A VALID AUTHORIZATION. To see if an authorization is valid, you must look at the "Consent List".	
How do I know if an authorization is VALID?	In the patient file, from the console of your choice, click on the **Consent List** button. The consent list automatically opens to the "Signed" Tab. Look for the person/facility you wish to share with. IF you see their name, double click on the name. The template will open, and in the right upper corner of the screen will be a grey box, click on the button that says "View Scanned Release". The signed VALID (active) authorization will pop up for your review. Be sure to READ the entire document. (Don't assume that just because a signed authorization popped up, that it's ok to proceed – you must review it to find out what the patient specified to be released.)
How do I know if an authorization has been drafted (but is not signed/scanned at this time)?	In the patient file, from the console of your choice, click on the **Consent List** button. The consent list automatically opens to the "Signed" Tab. Click on the "Unsigned/Revoked" Tab. IF you <u>do not</u> see the name of the person/facility you were looking for, you will need to draft a new authorization using the approved template found in the steps above, and then have the patient sign it. IF you do see the name of the person/facility you were looking for, you will need to print out the template and have the patient sign it to make it a VALID (active) authorization.
Who do I notify if I made an authorization for a family member (on the Hunt Campus)?	IF an authorization is completed with the selection "Invitation to Family Program", please send an email to the group **"Rescinded/Signed Consent(s) Notification**" or email FAMILY PROGRAM directly to notify them of the added authorization.
Who do I notify if I made an authorization for someone who needs a letter of admission (on the Hunt Campus)?	IF an authorization is completed with the selection "Letter of Admit/Discharge", please send an email to the group **"Rescinded/Signed Consent(s) Notification**" or email Maelee Hayes/Caleb Boone or Health Information Management Department directly to notify them of the added authorization.
If a ROI Authorization is in place and something else is requested, can it just be written on the current one?	No. If more documents or more verbal communication is required, a new authorization must be drafted to include this additional need. Patient needs to sign the new authorization. Likewise, should a patient direct that less information should be shared, the first authorization should be revoked, and a new one signed for the lesser items should be completed at that time.

QUESTION	**ANSWER**
How do I revoke an authorization?	In the patient file, from the console of your choice, click on the **Consent List** button. The consent list automatically opens to the "Signed" Tab. Look for the person/facility name you wish to revoke an authorization for (on behalf of the patient). IF you see their name, double click on the name. The template will open, and on the very bottom of the template is the area to revoke an authorization. Click on "Enter Revoke" to start the process. "Revocation date", "Time", "Staff Receiving Revocation" will auto-fill with your information in real time. Add any "Comments" as to why the revocation is occurring, and save the template. The , and then save it by clicking the and "Revoked By" section. Then save the grey box. Once the template has been saved with the completed revocation, the authorization will automatically DISAPPEAR from the Consent List "Signed" Tab, and will now appear on the "Unsigned/Revoked" Tab in a red alert. **(The the person/facility name you just revoked will appear in a red highlight)** *** REMINDER: Financial Authorizations can only be revoked in the business office during business hours ***
Who can revoke an authorization?	**Any staff member** with access to the electronic medical record can revoke an authorization with patient direction to do so. Once a revocation is complete (following the steps in the box above), you must send an email to the group **"Rescinded/Signed Consent(s) Notification**" to notify everyone of the revocation.
Who releases documents for all La Hacienda release of information requests (including requests on the weekends and from ICC) on the Hunt Campus? **Who does it on an IOP Campus?**	**ONLY HIM** (Health Information Management Department(HIM)/Medical Records) can release paper documents from the electronic medical record and any "specialty letters" on the Hunt Campus. This includes weekend requests from lawyers, pre-admission letters from Admissions (formerly ICC), or any other fax documents. **NO ONE ELSE** is to release documents EXCEPT in the case of a medical emergency or only after calling the HIM Director and discussing the situation with them. Reception has the cell phone number for the HIM Director (the cell number they have is ALWAYS on; including weekends). **IOP Campus** must go through their **Intake Coordinator** for this activity.

QUESTION	ANSWER
What documents can be emailed?	ONLY Health Information Management can email documents (just as they are the ones who can release documents from the chart in paper form). No other department is authorized to email documents from a patient chart. If an authorization is completed that contains an email address, that will be the primary way documents will be sent. They will be sent using a secure/ encrypted method to a recipient via email. This is currently at the HUNT location only. A trial period will commence at the beginning of 2017 and end in July 2017, at which time the program will be reviewed for possible roll out to the IOP's.
Who is allowed to communicate PHI via email?	Only individuals who have been trained by the Information Systems department are allowed to communicate via SECURE email. A valid authorization to communicate the information must exist prior to the email. No documents from the chart may be sent, the communication allowed is the same that would happen via telephone or in person. The email that is sent should be copied and pasted into a progress note as a disclosure.
Is it ever OK to put the WORD "email" in a progress note or an internal form such as the Inquiry Call?	**No.** Only you can keep us from "e-discovery". If you must convey that you notified someone of something, like to staffing or your supervisor and need to document this in a progress note, business office note, inquiry call note, etc., use phrases like "I notified _____ of situation." "I informed my supervisor of this development." "I alerted the medical team to the above." "Frankie L. (staff) reported that patient is _____."
Where can I find a letter template in AVENUES?	In the patient file, from the console of your choice, click on the **Print Letters/Contracts** button. Click on **Add Letter/Contract** and choose the template you wish to use. "**General Letter**" allows you to add a specific recipient, or you can address it To Whom It May Concern.
What forms can be moved over on a Re-Admission from a previous admission chart?	If a patient was discharged **30 DAYS OR LESS** from the date they are readmitted, specific forms can be copied over to the new admission chart with prompting directly from the Avenues System. The system will ONLY ASK ONE TIME if you wish to bring forward the old report for editing. If you do not say YES at this time, there is no way to move it over… ever. If you do not say YES at this time, you will have to do the complete report again in its entirety. ONLY the first user to open the form in the new admission will be prompted with this question to edit. All subsequent users will have to do a new form. IF you say yes to the editing request, the author will then need to review, update, and final sign the report in the new admission chart. These forms include: **H&P, Admission – Nursing Assessment, BPSA-Counselor's Assessment, Family Biopsychosocial Assessment**

 TOP 10 QUESTIONS FOR HIM REGARDING ROI, WEBSITE & EMAIL (AVENUES Version)

QUESTION	ANSWER
What forms can be moved over on a Re-Admission from a previous admission chart?	IF you need the **scanned BPSA patient self reporting or SASSI** moved over to the new admission, you will have to notify HIM that the report needs to be moved into the new chart. No Treatment Plans, etc. can be copied over to a readmission chart; those items must be redone. If readmission is a Day 31, ALL assessments, etc. must be redone.
What Forms are Available on the www.lahacienda.com website for HIM?	Go to the La Hacienda website, and click on the center button for "**Resources**". Click on the "**More Info**" button, click on the words "**Medical Records**" on the bottom left hand corner of the screen. This will open to the tab called "**Request Copies**". **(first tab) Request Copies:** Scroll to the bottom of this page and click on "**Download the Authorization to Release Protected Health Information**". This ROI form is for patient use AFTER Discharge, and is good at both the IOP and Inpatient sites. **(second tab) Revoke Authorization:** Scroll to the bottom of this page and click on "**Download the Revocation of Authorization to Release Protected Health Information".** This revocation form is for patient use AFTER Discharge to revoke one or all of their valid consents still yet to be expired. **(third tab) Financial Release:** Scroll to the bottom of this page and click on "**Download the Authorization to Release Information for Payment and Reimbursement Purposes".** This financial form is for patient use AFTER Discharge to add someone to their payer source communication for billing purposes only. **(fourth tab) FAQ:** This is answers to the TOP 7 questions we get from patients about their medical records.

(created: 10/7/2016; updated: 10/10/2016; 3-6-2017)

(Call x. 605 if you have any other questions)