# Chapter 12 – Client Consent

1. **Entry Steps: Client Profile, Intake**

2. Consents are required before sharing any information about a client with anyone outside the agency. In this system, you need to setup an independent consent with each agency with whom you are going to share information.

3. Go to **Client List** and select the **Activity List** for the desired client. Select **Consent** from the menu.

4. **Review Existing Consents**: There may be several consents already on record. Review any existing consents to see if they will suffice. Ensure they have not been revoked. If it has been revoked, it will be noted in **Status**.

5. Once you have determined that you need to create a new consent, use the **Add New Client Consent Record** hyperlink.

6. **Entities with Disclosure Agreements:** This is a drop down list of the Agencies for which an Agency Disclosure Domain record has been created. If you select an agency from this list it will pre-fill the **Disclosed to Agency** and the bodies of consented data in the **Disclosure Selections**.

7. You can change the Disclosure Selections to match exactly what the client is actually consenting to share.

   **Note: The Agency Disclosure Domain record can be created only by your Agency Administrator under the Agency module in the system.**

8. If you are establishing a consent for an agency with which an Agency Disclosure Domain record does not exist, you can leave this field blank and the system will give you a caution message. You can proceed with filling out all the other information.

9. **Disclosed to Agency:** Select the Agency you intend to send client information. You may only select one at a time. You will have to create another consent if you wish to send information to a second agency.

10. If the agency you are disclosing information to is another provider that uses HI-WITS, they will be able to see this client's record as soon as you complete and save the consent record

11. If it becomes necessary to share information with entities which are not listed in the drop down box, you may select the "Non System Agency" and type in the name of the individual or agency in the **Disclosed to Entity** box.

12. **Consent Date**: The consent date defaults to the current date. If the consent has been granted earlier, and is on file, HI-WITS allows you to change the date in this field.

13. **Has the Client Signed the Paper Agreement Form?** : The client may have given verbal permission, but has not yet signed the form. Indicate whether or not a signed paper record of the consent is on file. You may not transfer any data until the paper form has been signed and recorded.

14. **Generate Consent Form**: To obtain a signature, you may use the Print Report icon in the icon bar. It will generate a PDF form which may be printed for signature. After obtaining the signature, you may select **Yes** for **Signed?.**

15. **Regulations:** The client must have the option to consent to various bodies of data, without disclosing ALL data.

16. **Consent Options**: An expiration date must be associated with EACH body of data selected for consent. Select the Option in the left hand box, click on the appropriate Expiry Option, and then click on the right pointing arrow to move the selections to the right hand box. (See Basic Elements Training module for more information on how to use this control to make selections.)

    a. Discharge- The consent will expire based on the date of discharge + the number of days entered.

    a. Date Signed- The consent will expire based on the Consent Date + the number of days entered.

    a. Other Event- The consent will expire based on some specified event. The user must specify the date of expiration.

    a. Criminal Justice Condition- The consent will expire based on a criminal justice condition being met. The user must specify the date of expiration.

    a. Example shows an expiration set based on an *Other Event*.

17. **Description, Other Disclosures, and Comments:** These boxes are provided for you to document any narrative text you may want to include in the consent record. **Description** generally applies to any explanation you may have for the **Other Event** and the **Criminal Justice Conditions** for expiry of consent. **Other Disclosures** is generally used for listing or describing any other information or records that you may share that are not part of the listed modules under the Client Information Options.

18. **De-Selection**: In this example the client has de-selected *DENS ASI Lite.* They may also reset the expiration date if desired.

### *Revoking a Consent*

19. **Revocation:** A client may revoke a consent prior to its expiration. For the **Consent** you wish to revoke, click the **Review** hyperlink next to the appropriate consent.

20. You will see a **Revoke** button at the bottom of the **Client Disclosure Agreement** screen. Click the **Revoke** button.

21. You will be asked if you are sure you want to revoke the consent. If you answer yes the status of the consent will change to **Revoked** in the **Activity List**. If you answer no the status of the consent will not be changed and you will be returned to the consent screen.

22. Revocation is not retro-active. Any information previously shared between agencies prior to revocation is not subject to non-disclosure

***Consent to Referral***

23. Once you have created a signed consent, you may associate the consent with a referral. Use the review button to select the consent agreement.

24. The **Client Disclosure Agreement** screen allows you to create a referral for the client using the **<u>Create Referral Using the Disclosure Agreement</u>** hyperlink. It will take you to the **Client Referral** screen, pre-populating many of the fields.