

Adding Privacy Restrictions

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OP sets **all defaults to share all information**. Any individual decisions by Practice-users to restrict information sharing (access, use, or exchange) are the responsibility of the Practice in the implementation of its 21st Century Cures Act Information Blocking policies and procedures for its Practice and patients.

Version 14.19

Path: Clinical, Practice Management or Billing tab > Patient Chart > Privacy/Sharing

Overview

In this article you will learn how to add privacy restrictions.

Adding Privacy Restrictions

1. Click **Privacy/Sharing** in the Patient's Chart and populate the fields as necessary.
2. Set the **visibility level** for the entire patient medical record (optional). *In the case that there is a critical, sensitive matter (ex: abuse, high-profile) the overall medical record visibility can be set to an option higher than Any Staff Member. Changing this setting from All Staff Members to higher results in the patient chart toolbar changing from blue to red as an indication that this is a restricted chart. This change occurs in the bottom patient toolbar while in the patient register.*

Overall chart visibility:

3. Enter the patient's **Social Security Number** (optional). *It can be stored here for reference if needed, for reporting purposes in the office or for insurance needs.*

Social Security Number:

4. Select a **Contact Constraint** option (optional). *Privacy Constraints are for patients that need to have contact with only specific guardians.*

Contact constraints:

- Did not ask
- No restrictions expressed; OK to leave messages/send mail
- Restricted: Person-to-person with patient/guardian only
- Restricted: See note below

5. Enter a **Privacy Note** (optional). *This indicates why this record is to be kept private (ex: abuse, high-profile).*

Privacy notes:

6. Document Consent of Submission to Third Party. *Each state has its own requirement for consent documentation.*

Documented consent of submission to third party:				
Third Party	Consent Status	Effective Date	Expiration Date	Additional Notes
Local Immunization Registry	Not Documented			
RCOPIA	Not Documented			

7. Select **Immunization Registry Reminder/Recall Preference**.

Immunization Registry reminder / recall preference:	
Immunization Registry	Reminder / Recall Preference
<No data to display>	

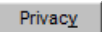
Version 14.10

Path: Smart Toolbar > Register button > Privacy tab

Overview

You will learn how to add privacy restrictions.

Adding Privacy Restrictions

1. Click on the **Privacy** tab  and populate the fields as necessary.
2. Set the **visibility level** for the entire patient medical record (optional). *In the case that there is a critical, sensitive matter (ex: abuse, high-profile) the overall medical record visibility can be set to an option higher than Any Staff Member. Changing this setting from All Staff Members to higher results in the patient chart toolbar changing from blue to red as an indication that this is a restricted chart. This change occurs in the bottom patient toolbar while in the patient register.*

Overall medical records visibility:

Privacy tab: Visibility

3. Enter the patient's **Social Security Number** (optional). *It can be stored here for reference if needed, for reporting purposes in the office or for insurance needs.*

SSN:

Privacy tab: Social Security Number

4. Select a **Privacy Constraint** option (optional). *Privacy Constraints are for patients that need to have contact with only specific guardians.*

Contact privacy constraints:

Did not ask

No restrictions expressed; OK to leave messages/send mail

Restricted: Person-to-person with patient/guardian only

Restricted: See note below

Privacy tab: Privacy Constraints

5. Enter a **Privacy Note** (optional). *This indicates why this record is to be kept private (ex: abuse, high-profile).*

Privacy Notes: (100 chars max)

Privacy tab: Privacy Notes

6. Document Consent of Submission to Third Party. *Each state has its own requirement for consent documentation.*

Documented consent of submission to third party:				
Third Party	Consent Status	Start Date	End Date	Additional Notes
Pennsylvania IS	Not Documented			
Doylestown Community Network	Not Documented			
RCOPIA	Not Documented			

Privacy tab: Document Consent Form

7. Select **Immunization Registry Reminder/Recall Preference**.

Immunization Registry Reminder / Recall Preference:	
Immunization Registry	Reminder / Recall Preference
Pennsylvania IS	

Privacy tab: Immunization Registry