Patient Chart: Privacy/Sharing

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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

> 🎯 *This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.*
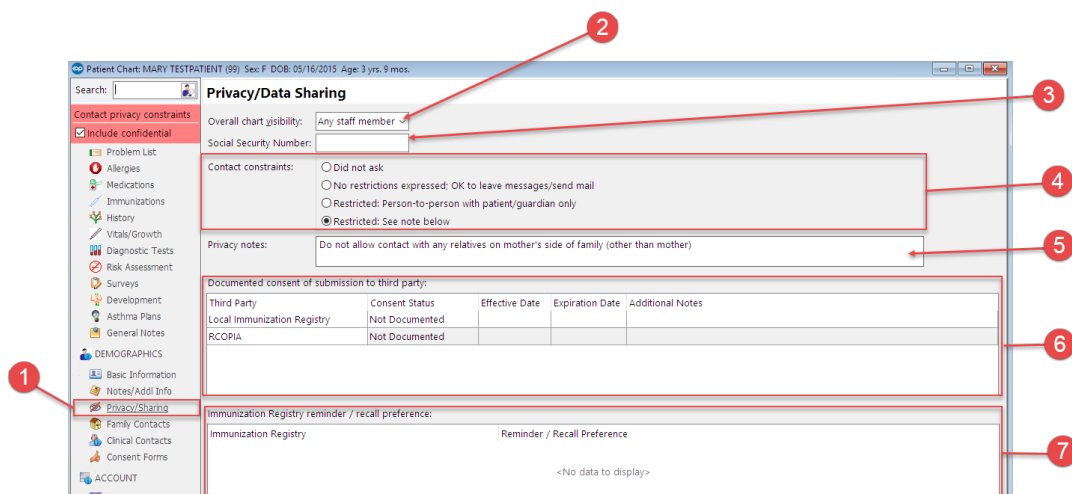
About Patient Chart: Privacy/Data Sharing

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

The Privacy/Data Sharing window allows you to add privacy information and restrictions to the patient register.

> 📌 **Note**: Just like a paper chart, the electronic chart in OP contains personal health information and should be kept protected and confidential. Always close all windows on your screen and log out of OP when you are not at your workstation.

Patient Chart: Privacy/Data Sharing Map

Number	Section	Description
1	Privacy/Sharing button	The Privacy/Sharing button accesses the Privacy/Data Sharing window in the patient's chart.
2	Overall Medical Records Visibility	The Overall Medical Records Visibility sets 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. Upon setting the overall medical records visibility to Clinical Staff Only or higher, the chart toolbar color will change from blue to red to

		inform you this is a restricted chart.
3	SSN	The SSN field is where you enter the patient's social security number (optional). The social security number can be stored here for reference if needed for reporting purposes in the office or for other insurance needs.
4	Contact Privacy Constraints	The Contact Privacy Constraints field is an optional field that sets constraints that require contact or medical information to only be shared with specific guardians.
5	Privacy Notes	The Privacy Notes field is an optional field where you can enter additional privacy notes. This can be the location that indicates why the record is kept private (ex: abuse, high-profile).
6	Documented Consent of Submission to Third Party	The Document Consent of Submission to Third Party lists the consents to release medical information to third parties. The type of consent, the status of the consent, start and end dates, and additional notes are shown here.
7	Immunization Registry Reminder/Recall Preference	The Immunization Registry Reminder/Recall Preference field indicates how a patient is contacted about immunizations. The field displays the selected immunization registry applied to the patient as well as the reminder/recall preference method for the patient.

Version 14.10

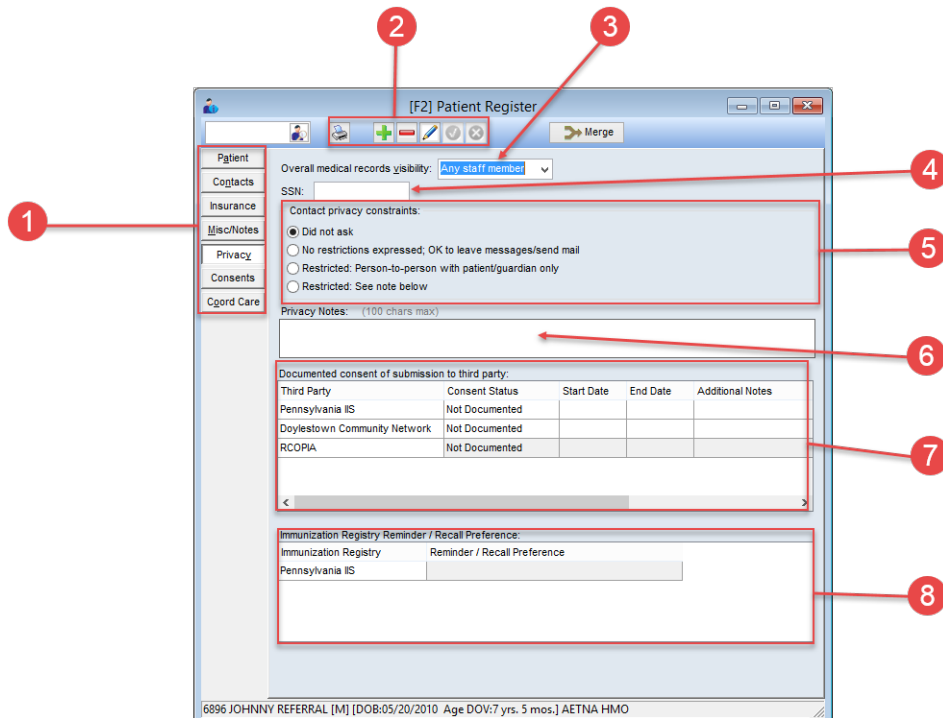## About the Patient Register: Privacy Tab

Path: Smart Toolbar > Register button > Privacy tab

Whether a new patient is entering your practice or your practice is transitioning from paper to electronic records, creating a Patient Register record is the first step in registering a patient in your database. The Patient Register assigns each patient a unique patient ID number, and automatically creates a Patient Chart for the patient.

Using the patient register you can:

- Link Families
- Confirm a new patient needs to be registered
- Register a new patient
- Print a patient's demographics
- Copy a sibling's register record
- Add relatives or contacts to a patient's register record
- Add, edit, copy or validate insurance
- Add miscellaneous notes
- Add privacy restrictions
- View and add consent forms
- View and add to the patient's coordination of care
- Change the family address.

The Privacy tab allows you to add privacy information and restrictions to the patient register.

Patient Register: Privacy Tab Map

Number	Section	Description
1	Patient Registration Category Tabs	The Patient Register contains the following tabs: • **Patient** • **Contacts** • **Insurance** • **Misc/Notes** • **Privacy** • **Consents** • **Coord Care**
2	Function buttons	The function buttons allow the user to print, create, delete, edit, save, and cancel the insurance information displayed or entered in the patient register.
3	Overall Medical Records Visibility	The Overall Medical Records Visibility sets 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. Upon setting the overall medical records visibility to Clinical Staff Only or higher, the chart toolbar color will change from blue to red to inform you this is a restricted chart. While in the register, the patient bottom toolbar will also change from blue to red.
4	SSN	The SSN field is where you enter the patient's social security number (optional). The social security number can be stored here for reference if needed for reporting purposes in the office or for other insurance needs.
5	Contact Privacy Constraints	The Contact Privacy Constraints field is an optional field that sets constraints that require contact or medical information to only be shared with specific guardians.
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