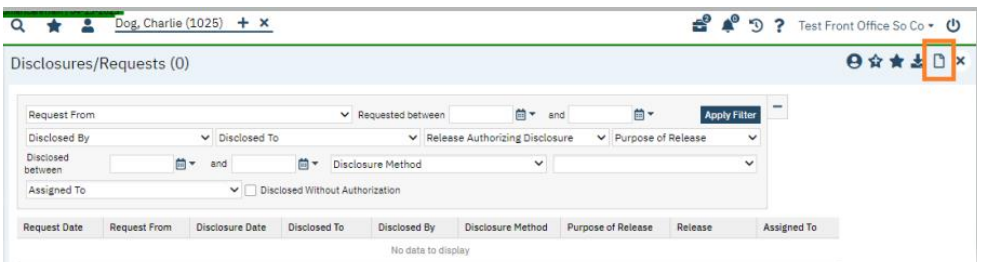
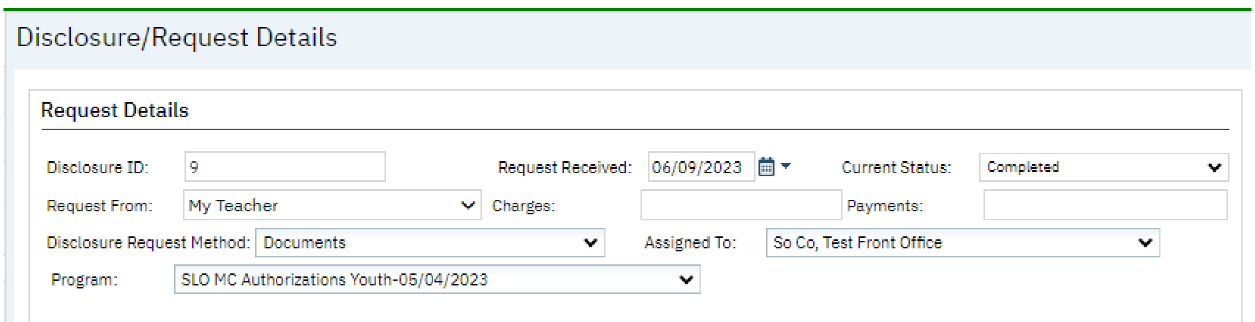
3rd Party Disclosures/Disclosure Log in SmartCare

SmartCare search words are in **bold**.

1. With the client record open, search **Disclosure,** and select **Disclosures/Requests (Client).**

2. Click the New icon.





3. In the Request Details section, enter information about the requestor/request.

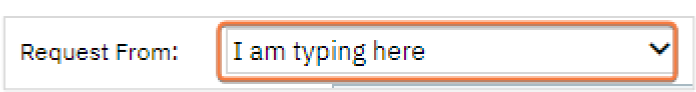
   a. Disclosure ID will automatically populate on Save, no need to enter anything.

   b. Enter the Request Received date. (This may be a date prior to the current date.)

   c. Select the Current Status from the dropdown. If you will be completing the disclosure, select Completed.

   d. Select Request From in the dropdown. Note, this pulls from the client contacts (Client Information screen > Contacts tab).

      1. If a request is from someone not on the client contact, and you do not intend to add them as a contact, you may type directly into the field by adding your curser to the Request From field.



e. Enter Charges and Payments, if applicable.

   1. These can be entered for tracking. They will not actually create a charge or a payment.

f. Select Disclosure Request Method from the dropdown.

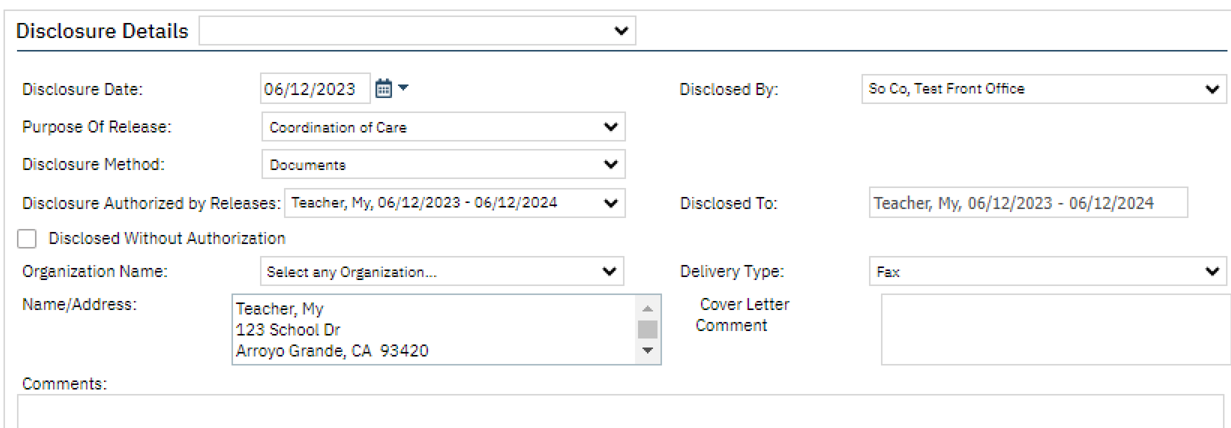
g. Select Assigned To if Request is being assigned to someone.

   1. Assigned requests can be located on the list pages only, a notification is not sent.

h. Select the Program. If a client is only associated with one program it will default to the program.

4. In the Disclosure Details section, enter information about the disclosure.

Note: Disclosure templates are not currently set-up, but in the future, when this is available….To attach a Record Set, you must choose a Disclosure Template from the dropdown beside the Disclosure Details header. Click the Attach Record Set button. The record set associated with the template will be attached. (Disclosure templates identify documents that should be included in a disclosure. Saves time from having to add them.)



a. Enter the Disclosure Date. This is the date the disclosure occurs.

b. Select the person who performed the disclosure from the dropdown.

c. Select the purpose of the disclosure.

d. Select the method of disclosure from the dropdowns.

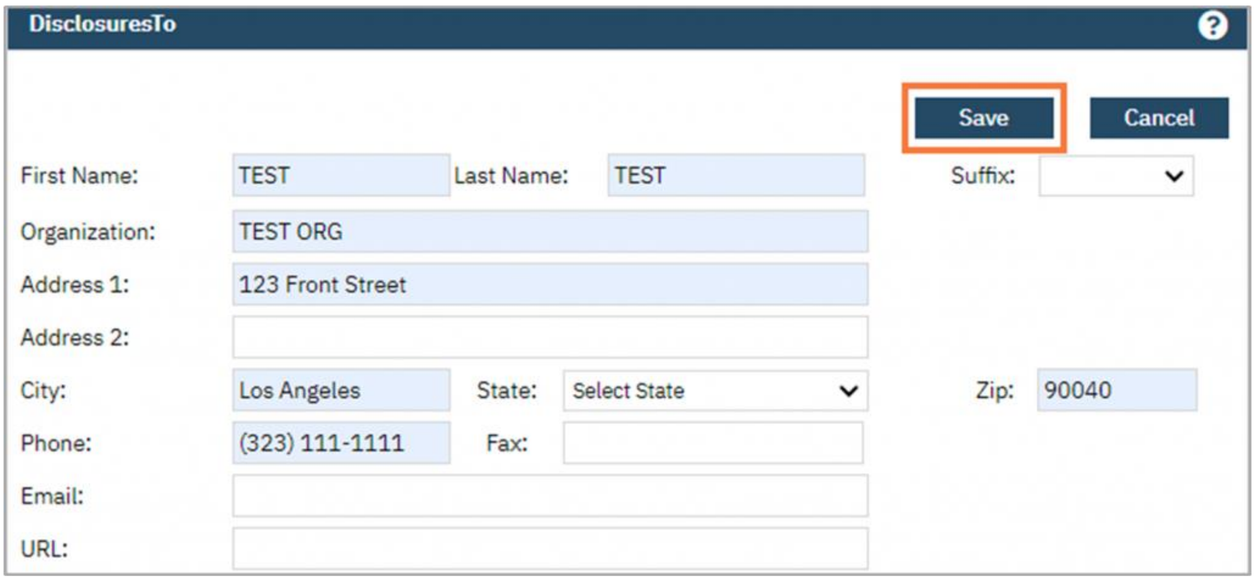
   1. Other and Verbal will disable the ability to attach documents; the button will be disabled.

e. Select the release that authorizes the disclosure. This dropdown pulls from Client Information > Release of Information Log. If using an AZ Authorization to Use/Disclose PHI, see instructions on how to enter in SC at end of how-to guide (pages 8-10).

1. Release of Information log can store releases signed in SmartCare and releases that are manually added.
2. If no Release of Information exists, select the Disclosed Without Authorization checkbox.

f. Disclosed To will automatically populate based on release selected.

1. If the person/organization to whom information was disclosed is not found, an ellipses button will initialize.
2. Click the ellipsis button, the Disclosure To pop-up window will appear.
3. Add information about the person/organization and click Save.



g. If needed, select the organization from the dropdown.

h. Select delivery type from the dropdown options.

i. Name/Address field will populate from the Disclosed To. You can edit this field if needed.

j. Cover Letter Comments can be added if you will be utilizing a cover letter in the disclosure and want to add additional comments.

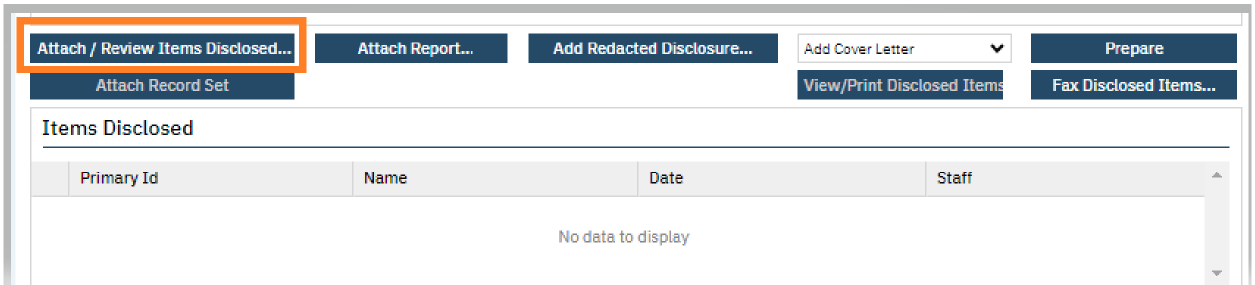
k. Add any comments if needed. (If disclosing records from AZ, you would want to list them here.)

l. When disclosing actual parts of the client record in SmartCare, you will want to add items to be disclosed. This is accomplished by:

1. Attach/Review Items Disclosed (Step 5 below.)
2. Attach Report (Step 7 below.)
3. Add Redacted Disclosure (Step 8 below)

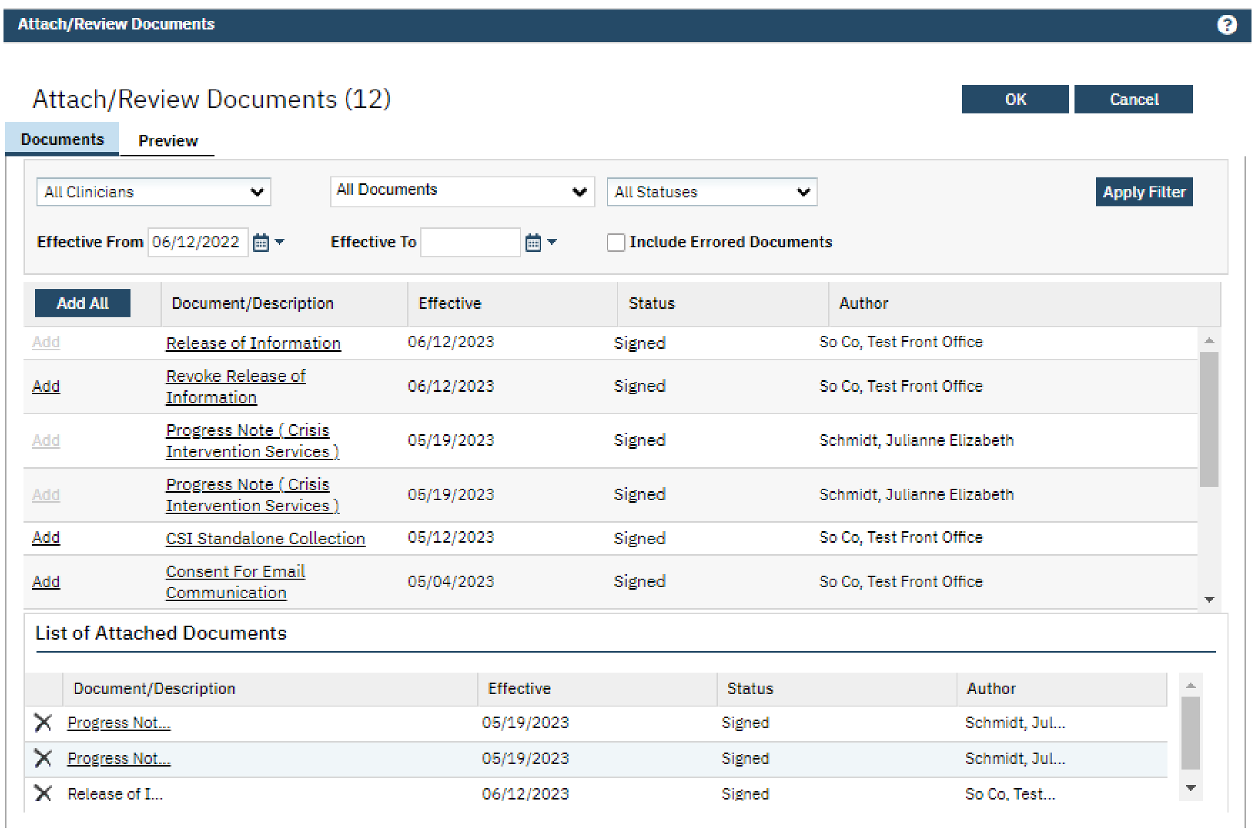
4. Attach Record Set buttons. (4 Note above speaks about this.)

5. Click the Attach/Review Items Disclosed button.



The pop-up window will display items in the client's record. You can utilize the filters to narrow down items displayed.

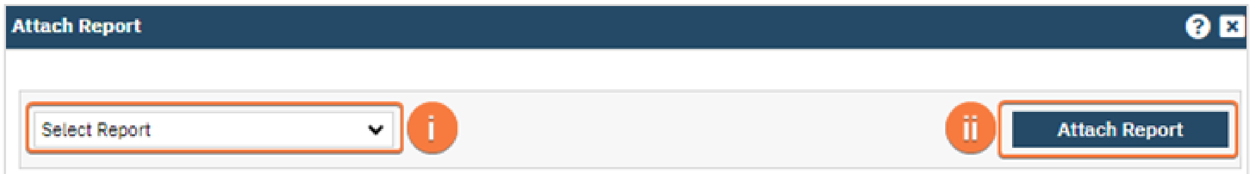
6. Click Add next to each item you are disclosing. Items will appear in the List of Attached Documents section. Once done, click OK.



7. If you want to attach report, click the Attach Report button. The Attach Report pop-up window will display.

Select the desired report from the dropdown. Only reports configured to display here will be available.

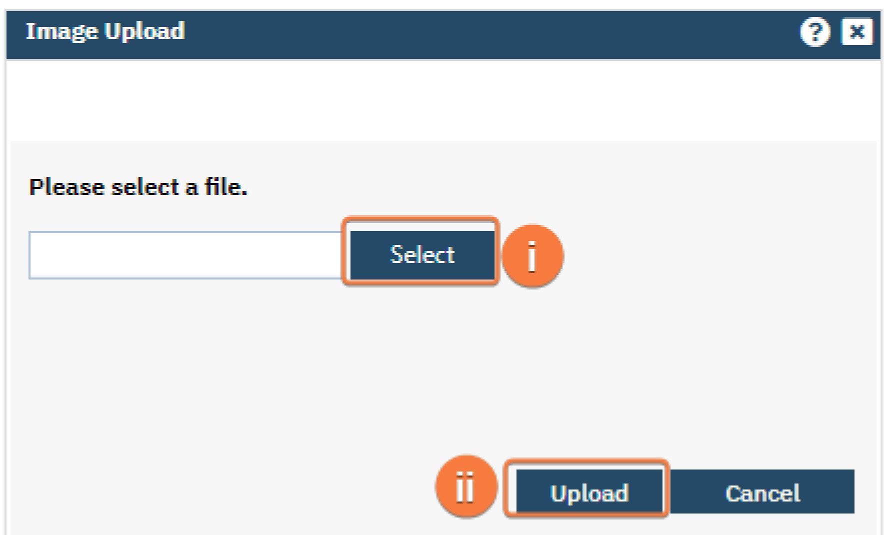
Click the Attach Report button.



8. To add a redacted disclosure, Click Attach Redacted Disclosure to add a redacted item. SmartCare does not redact items directly they will need to be uploaded into the disclosure.

In the pop-up, click 'Select' and choose a file from your computer's file structure.

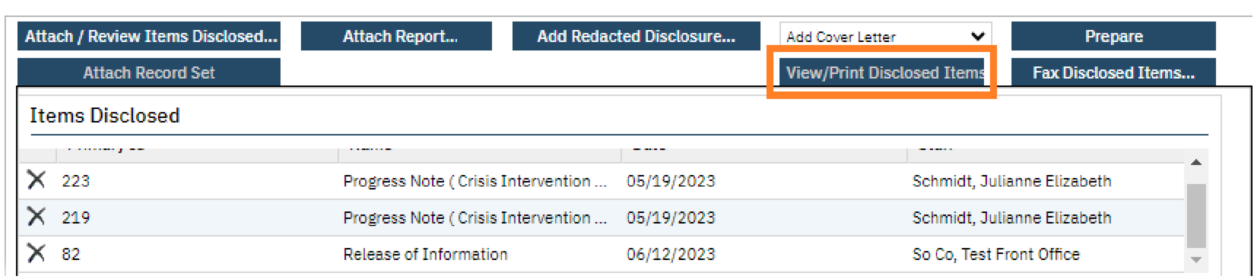
Click the Upload button.



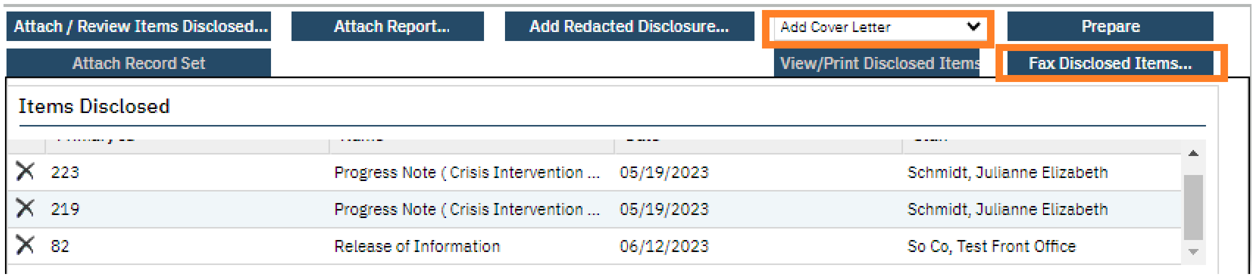
9. Once all desired attachments have been added to the disclosure, choose a method for disclosure.

Methods for Disclosure

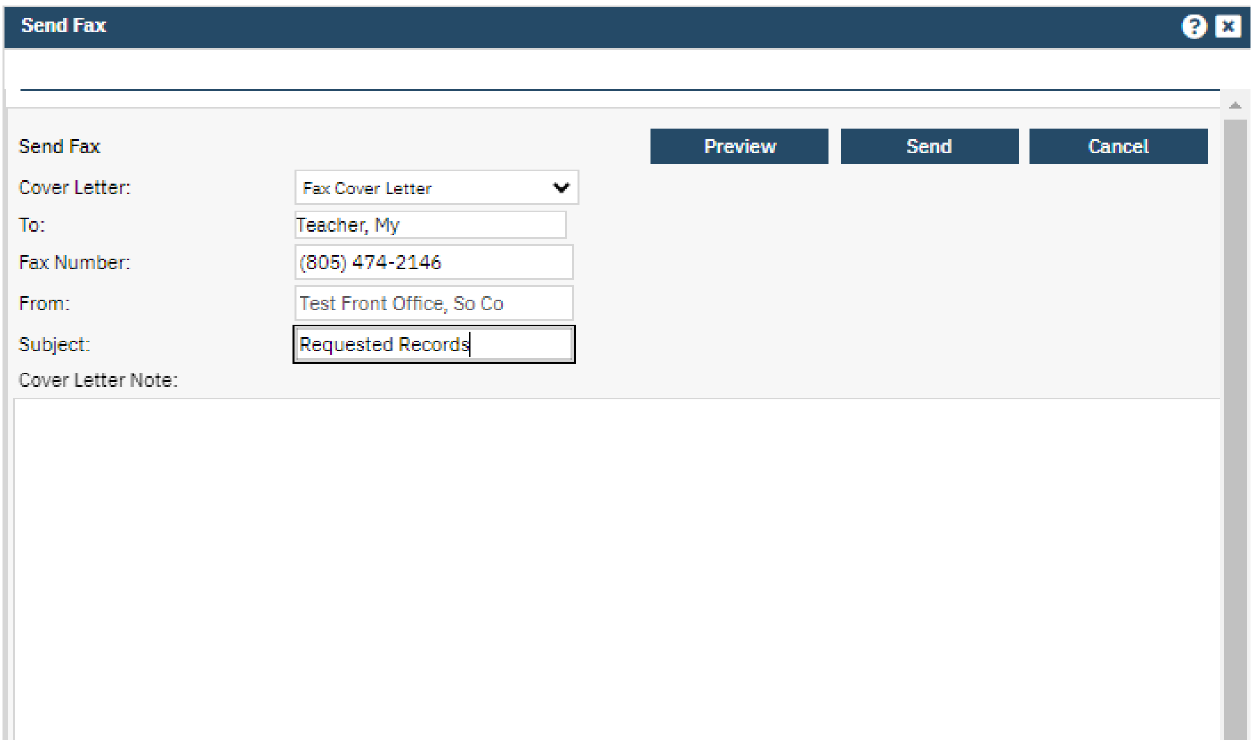
1. Mailing-If you need to print the documents, click the View/Print Disclosed Items.



2. Faxing-You can add a fax cover letter (Cover letters are created by system administrators), then select Fax Disclosed Items.



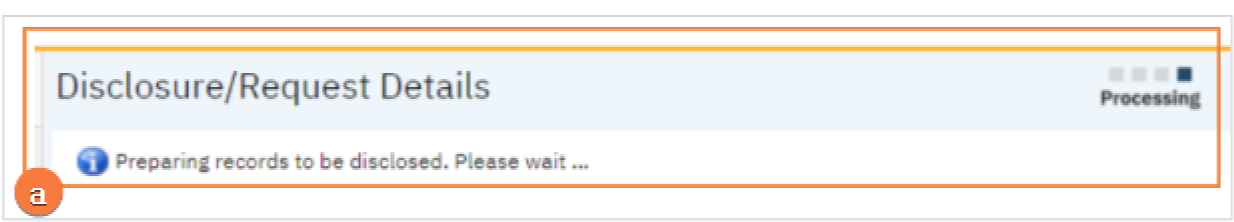
3. Select your cover letter, enter in fax number, subject, and cover letter note. You can preview before sending or just send.

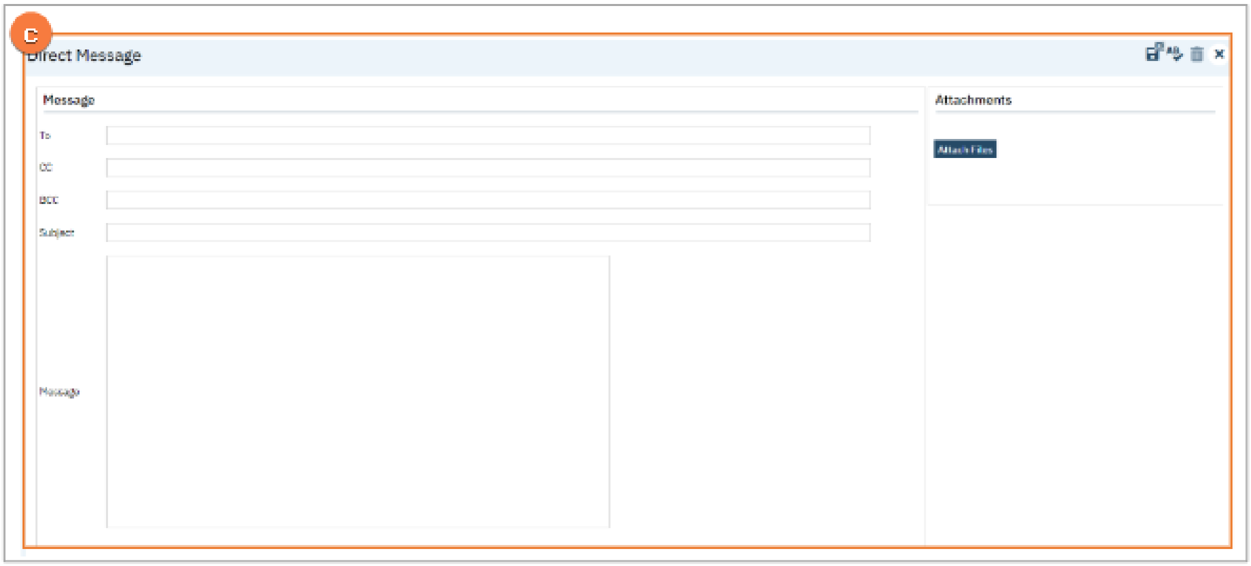


4. Email-To send as a Direct Message, click Prepare, this will convert the multiple PDFs into one PDF.

- A processing message will appear.
- When processing is completed, select the Send Direct Message button.

A Direct Message screen will appear. Enter an email address, subject, and message, and attach any other files desired. Click Save and Close to send the direct message and attached disclosure.

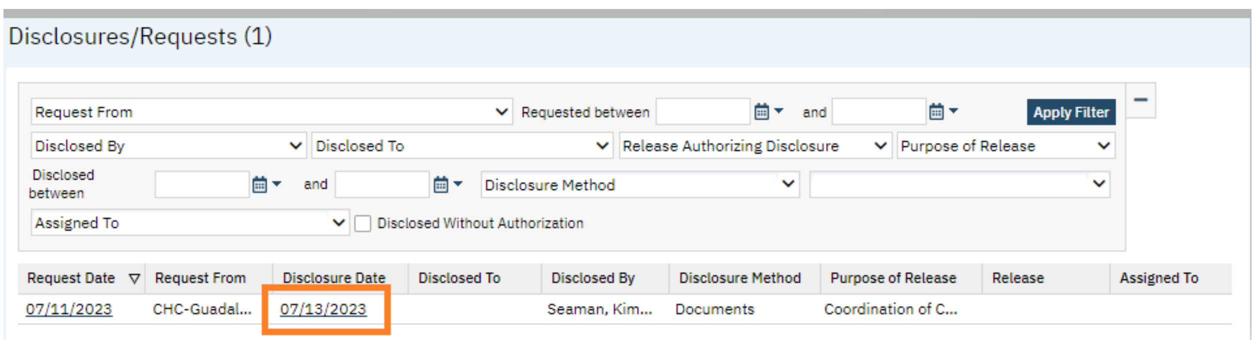




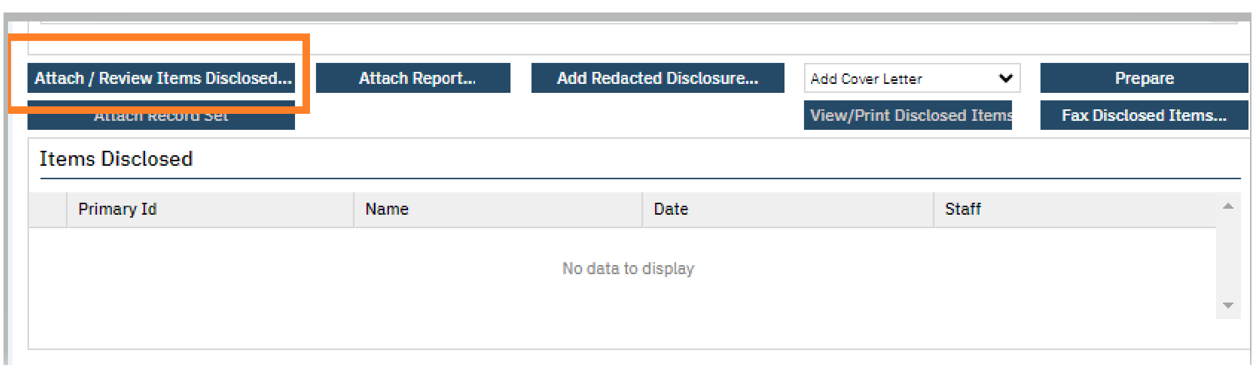
Attaching Request to Completed Disclosure

Once you have completed the disclosure and scanned in the request and/or fax coversheet & confirmation, you can attach these items to the Disclosure/Request.

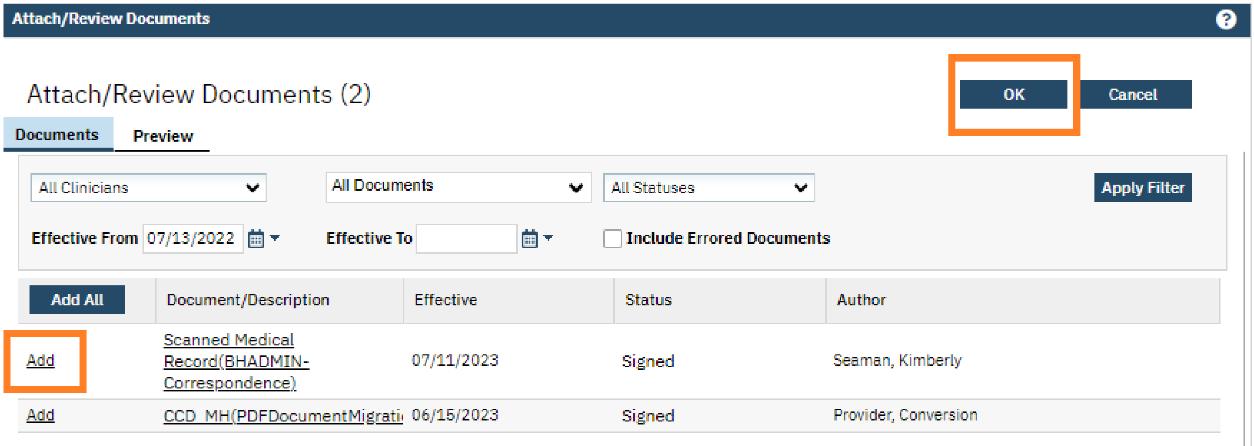
1. In the Disclosures/Request screen, locate the disclosure and click on the disclosure date.



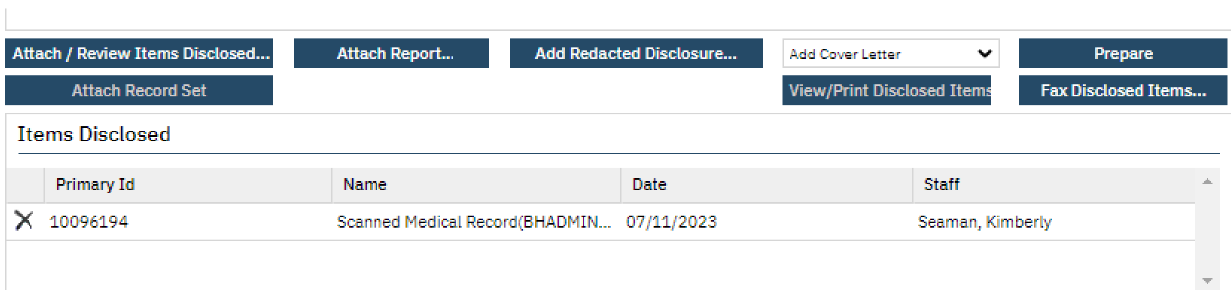
2. Click the Attach/Review Items Disclosed button.



3. Locate your scanned request. Click Add and OK.



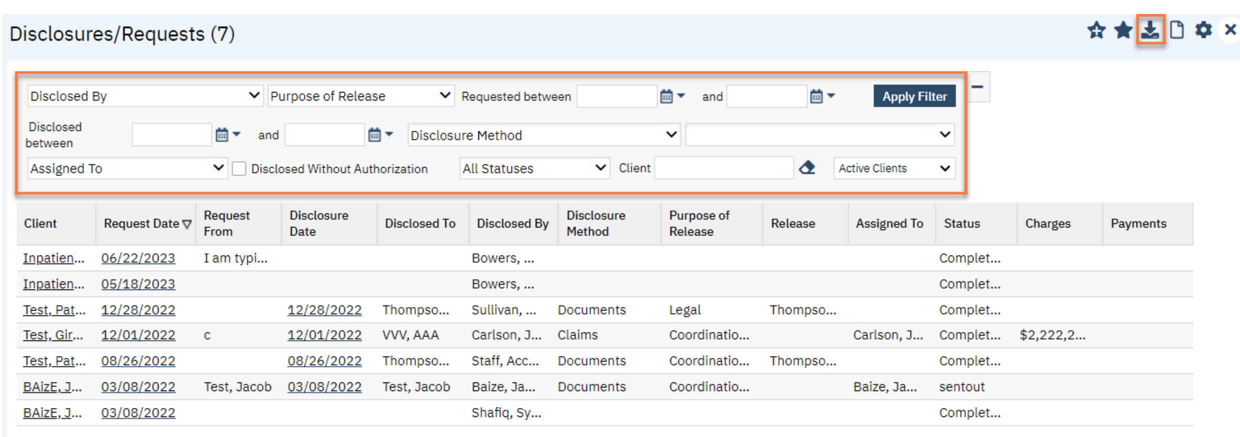
4. Attached request will show. Click Save at top of screen and X to close.



How to See a List of Disclosure Requests

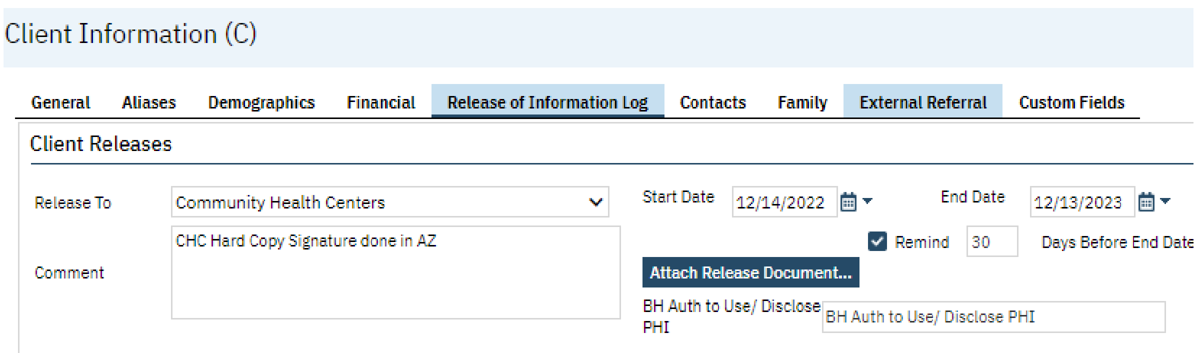
You can use the filters as needed to sort the data. You can also use the export icon to export this to Excel or other formats.

All disclosures will appear at the bottom of the **Disclosures/Requests** screen.

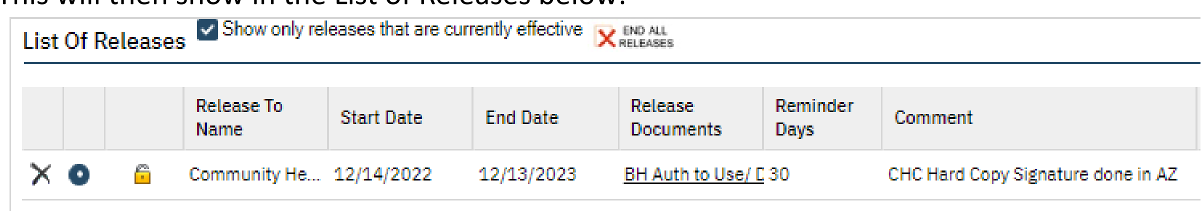


Adding Release of Information to SC for Authorizations completed in Anasazi

1. In Anasazi pull up client on Clinicians Home Page
2. View List of Authorizations that are current in Assessments tab
3. Check to see if:
    a. LPHA signed
    b. LPHA signature is needed.
4. If LPHA signature is needed go to 7
5. If LPHA Signature not needed or LPHA already signed
    a. Go to Anasazi, print signed copy of authorization to PDF and attach to record in SmartCare
    b. Go to Release of Information Log on **Client Information** Screen
    c. Type in Release to box the entity on the Authorization, the start and end(expiration) date per the AZ Authorization set a reminder for notification, add a comment that original was done in Anasazi and attach the scanned document, then select insert



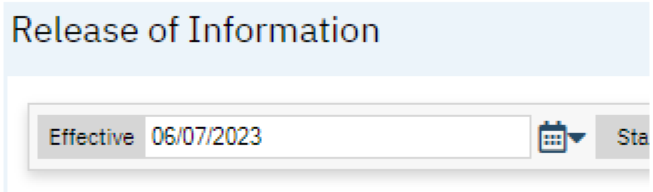
    d. This will then show in the List of Releases below:

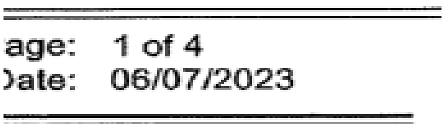


6. Repeat as Needed and Save.

7. If LPHA did not sign authorization in Anasazi
    a. Open Authorization in AZ to view
    b. With client selected in SmartCare launch **Release of Information** Authorization

c. Change Effective date to match date of authorization in AZ (use calendar)





d. In expiration section change dates to match date of authorization and expiration date to match Authorization in Anasazi

e. Complete ROI Authorization to match AZ Information to be Used or Disclosed

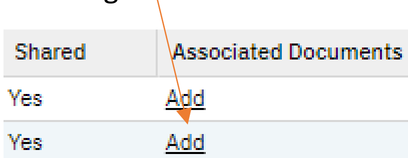
f. Sign

g. Co-Sign client and/or parent signature as hard copy signature to match AZ copy

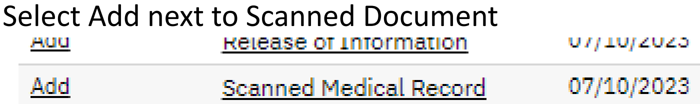
h. Add LPHA/Staff to co-sign

8. Once LPHA/Staff signatures are obtained link documents.

   a. In **Documents** (Client), link Release of Information and Scanned document by selecting Add under Associated Documents on line for Release of Information



   b. Select Add next to Scanned Document

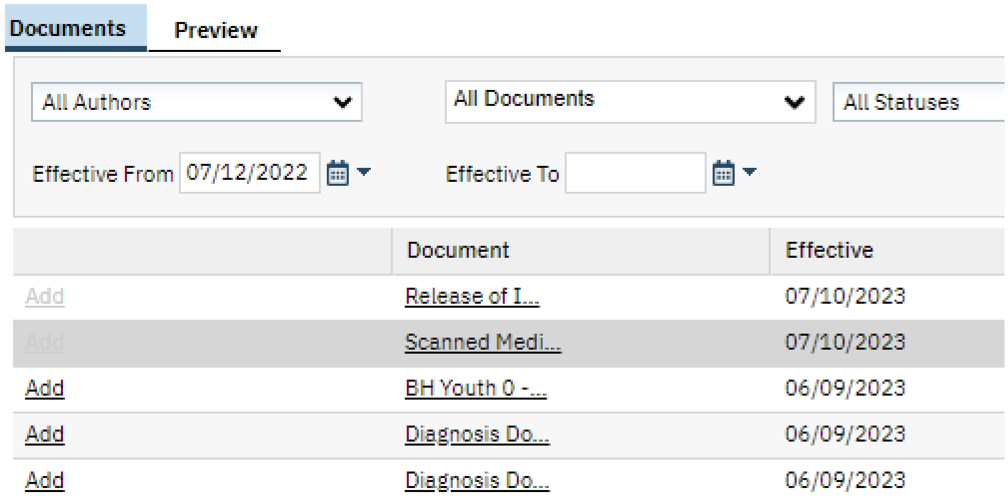


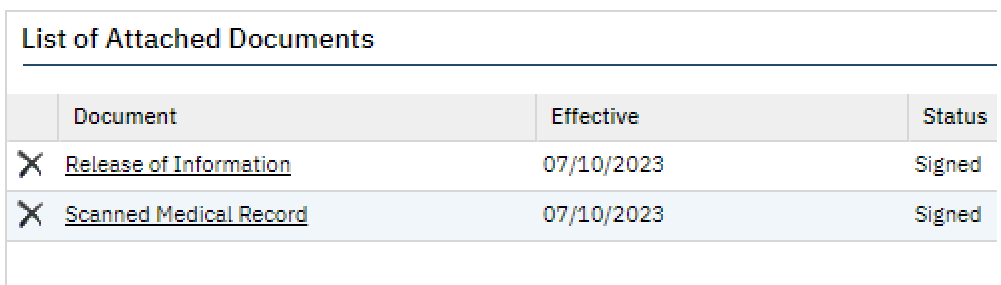
   c. Select Okay and it will bring you back to Document page showing association.

   d. Repeat for Scanned Document linking it to the Release of Information.

9. Go to **Client Information** Release of information Log.

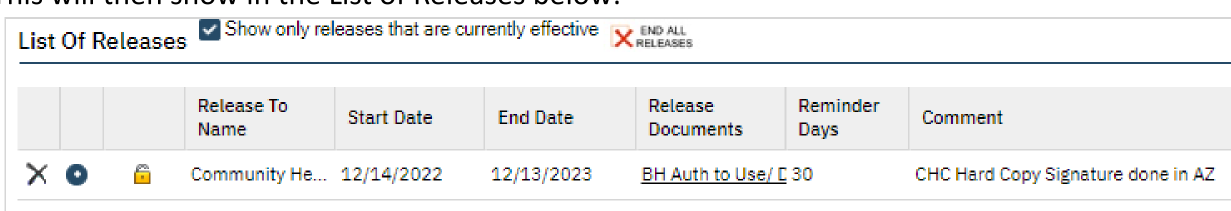
   a. Enter Type in Release to box the entity on the Authorization, the start and end(expiration) date per the AZ Authorization set a reminder for notification, add a comment that original was done in Anasazi and attach the scanned document, and the SmartCare Release of Information





b. Select OK, this will bring you back to the Release of Information Log, select Insert.

c. This will then show in the List of Releases below:



d. Repeat as Needed and Save.