How to Guide: Admin Paper Consent Tracking

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ABOUT THE ADMIN PAPER COSENT TRACKING FORM

Some providers may use the paper versions of the following forms rather than completing and submitting them directly on Avatar. When this occurs, the provider must provide Admin with the completed forms to be scanned into Avatar via the Document Capture and also tracked via the Admin Paper Consent Tracking Form.

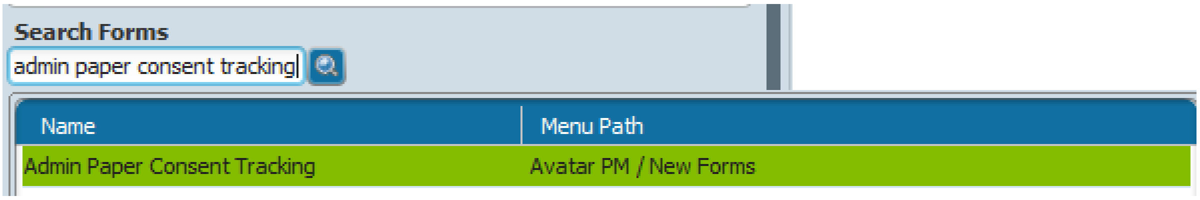
Alternatively, some providers might use Avatar to generate the following consent forms, print them out, and then bring them to the client to obtain consent by having them sign the first page form. In this case, only the first page of the Avatar generated consent forms, that includes the client's signature, needs to be scanned into the chart.

- Advanced Health Care Directive Notice
- Assignment of Benefits
- Consent to Treatment
- Release of Information
- Notice of License/Registration/Trainee
- Consent to Electronic Communication

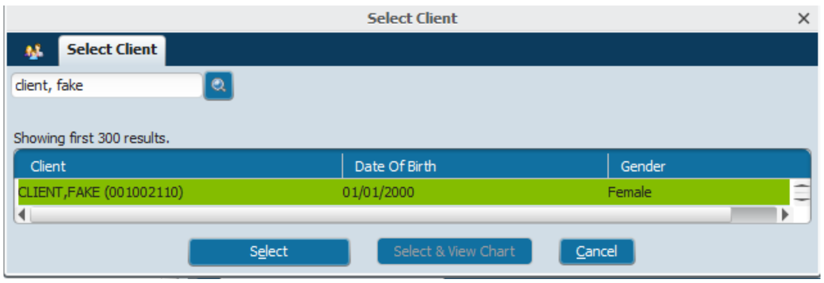
Please review all paper consent forms provided to you prior to scanning them into Avatar and tracking them to ensure all sections have been completed. If there is any required information missing, please return to the form to the provider to add any missing information before returning the form to you to scan and track.

WHERE TO FIND THE ADMIN PAPER CONSENT TRACKING FORM IN AVATAR

In the "Search Forms" field, type in "Admin Paper Consent Tracking" and select the form.



Enter the client’s name you are tracking the consent for and double click to open.



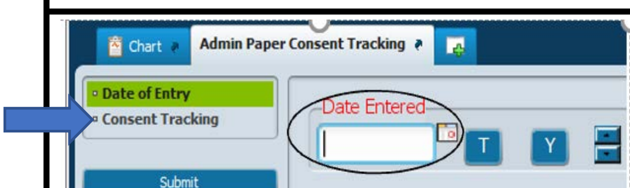
HOW TO COMPLETE THE ADMIN PAPER CONSENT TRACKING FORM

After you have selected the client that you are entering the information for, you will see one of two screens.

You will see either Screen A OR Screen B pop up next depending on if this is the first time a consent has been entered into the tracker for the client or not.

<table>
<tr><th>Screen A</th><th>Screen B</th></tr>
<tr><td>If this is the first time that consent is being tracked for the client, you will see the following screen.

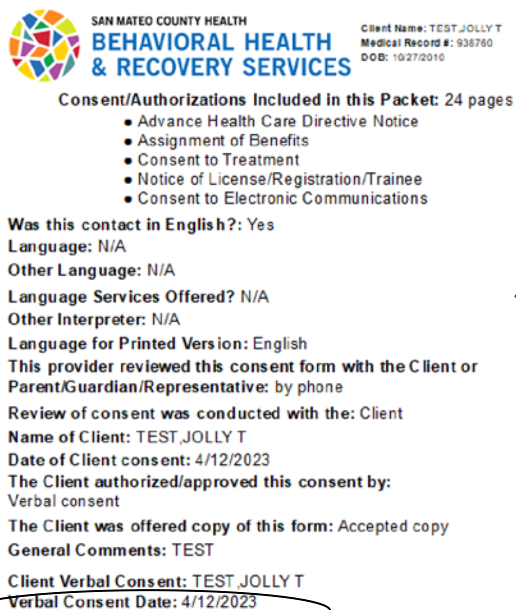
Enter the current date in “Date Entered.” DO NOT CLICK SUBMIT. Click “Consent Tracking” under “Date of Entry” on the left-hand side.</td><td>If a consent has already previously been entered in for the client to be tracked, you will see the following screen.

Select any date under “Date Entered” and double click or press edit to open.</td></tr>
<tr><td>
</td><td>
</td></tr>
</table>

Click on the second tab, “Consent Tracking” to open. You will see a list of all previous consents that have already been entered into the system, <u>OR</u> this will be blank if no previous consents have been entered

This list will be **blank** if no previous consents have been entered.

Refer back to the consent documents that the provider gave to you to enter into the Admin Paper Consent Tracking to see which consents you will be entering.



SAN MATEO COUNTY HEALTH
BEHAVIORAL HEALTH & RECOVERY SERVICES

Client Name: TEST,JOLLY T
Medical Record #: 938760
DOB: 10/27/2010

Consent/Authorizations Included in this Packet: 24 pages

- Advance Health Care Directive Notice
- Assignment of Benefits
- Consent to Treatment
- Notice of License/Registration/Trainee
- Consent to Electronic Communications

Was this contact in English?: Yes
Language: N/A
Other Language: N/A
Language Services Offered? N/A
Other Interpreter: N/A
Language for Printed Version: English
This provider reviewed this consent form with the Client or Parent/Guardian/Representative: by phone
Review of consent was conducted with the: Client
Name of Client: TEST,JOLLY T
Date of Client consent: 4/12/2023
The Client authorized/approved this consent by:
Verbal consent
The Client was offered copy of this form: Accepted copy
General Comments: TEST

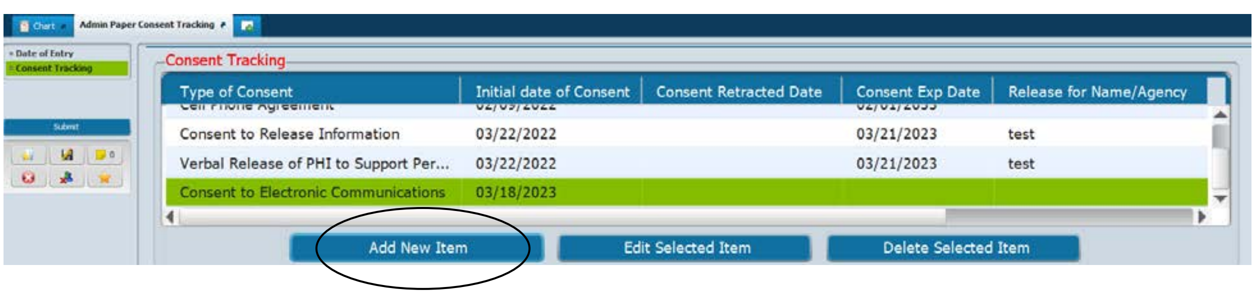
Client Verbal Consent: TEST,JOLLY T
Verbal Consent Date: 4/12/2023

Here is an example of a printed consent signed by a client with MULTIPLE CONSENTS.

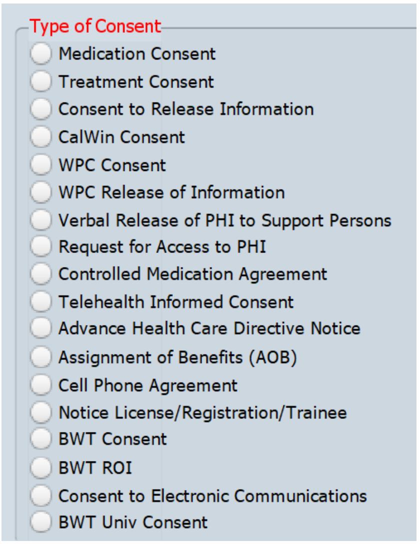
All of these consent types (except the Notice of License/Registration/Trainee) would be entered in as a Type of Consent, one at a time.

All consents have the same Date of Client Consent.

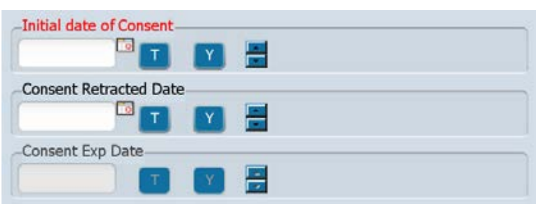
To add a new or initial consent to the list, click on “Add New Item”



Select the “Type of Consent” you would like to add from the list. (NOTE: The documents on this list might change/be updated from time to time). You can only enter one consent at a time.



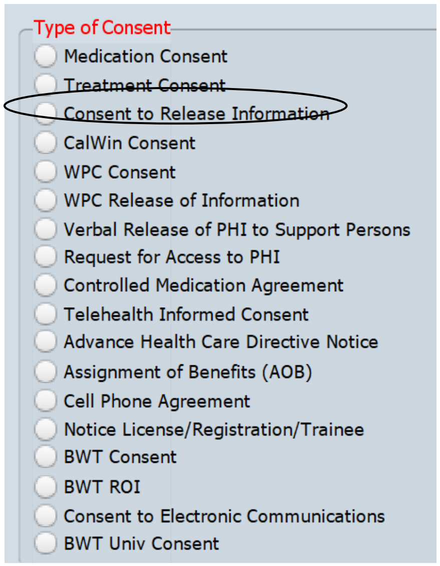
Enter the Initial Date of Consent found on the documents provided to you. Most consents do not have an expiration date, therefore in most cases this section can be left blank. NOTE: A Release of Information will have an expiration date.



CONSENT SPECIFIC INSTRUCTIONS

Release of Information

When entering in a Release of Information, select Consent to Release Information form the list.

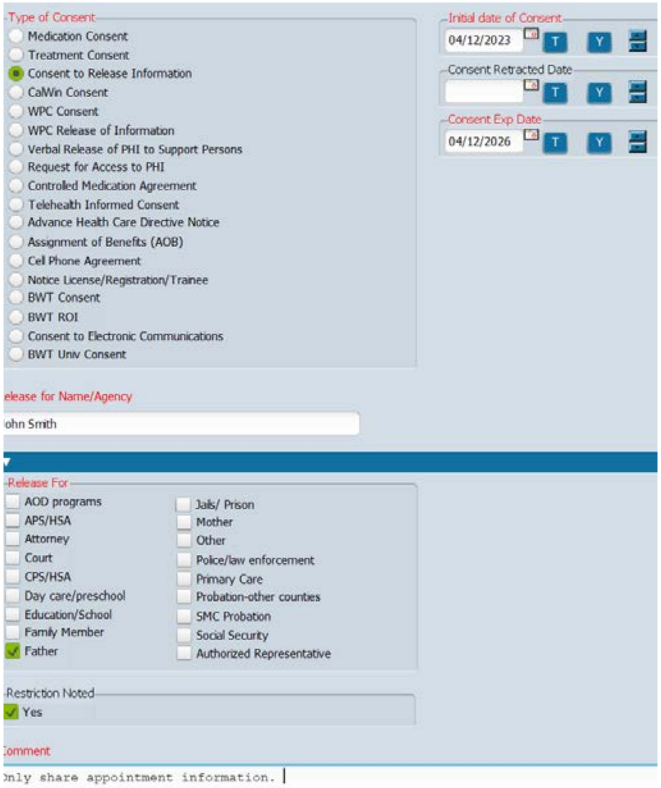


Enter Initial Date of Consent and the Consent Expiration Date as well as the other required (red) fields. You can find this information on the Release of Information (Authorization for Use or Disclosure of PHI) provided to you by the client.

If you are unsure about any of the information provided, please ask the person who submitted the form to you to clarify.

If there is a restriction noted, selected Yes and add any related information to the Comment box.

If there are no restrictions noted on the consent, you can leave the check box and the comment box blank.

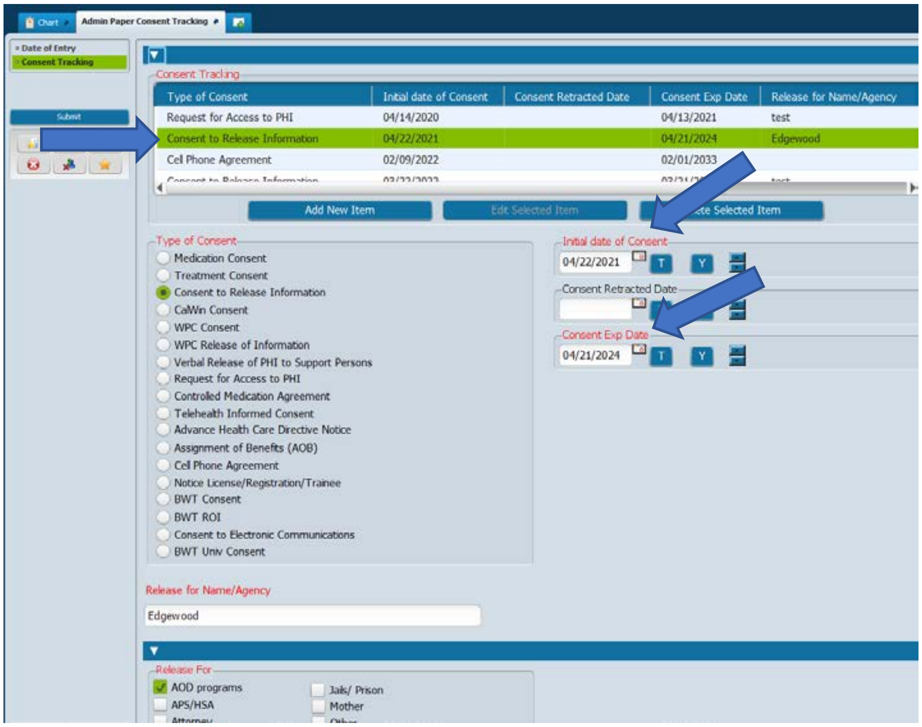


HOW TO RETRACT A CONSENT

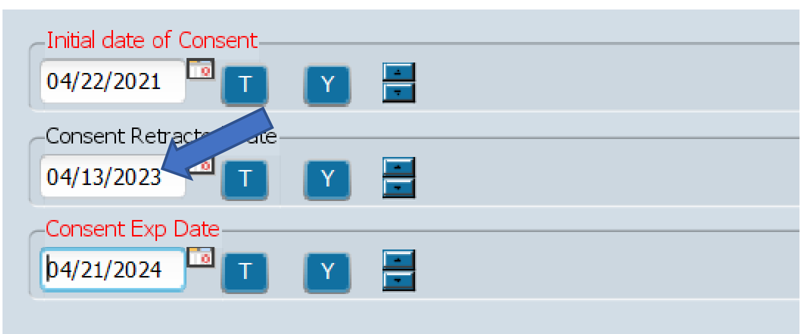
A provider may notify you that a client has requested to retract a previously agreed to consent that you have entered into the Admin Paper Consent Tracking form. For example, the client previously consented to share information with their father, but they've changed their mind and no longer want to allow BHRS and the father to communicate. You will need to retract the consent.

**If a provider asks you how to retract a consent they completed themselves, directly on Avatar, via the Clinical Consent Form, please direct them to the How To Guide: Clinical Consent Form for step-by-step instructions.*

Double click on the consent to be retracted so that the consent information shows up on the rest of the form.



Type in the Consent Retracted Date and Submit.

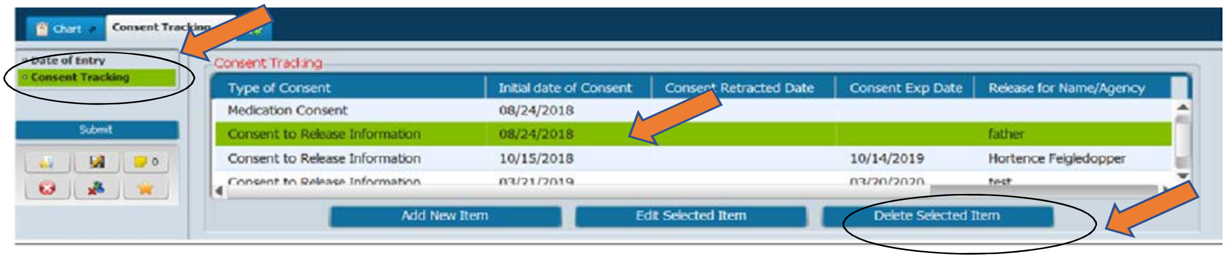


The retraction will now show up on the Admin Paper Consent Tracking Widget.

HOW TO DELETE A CONSENT WHEN ENTERED BY MISTAKE

Be careful to only delete a consent if it's a mistake.

In the list of consents under the Consent Tracking tab, click on the consent you would like to delete and click Delete Selected item and Submit.



ADMIN PAPER CONSENT TRACKING WIDGET

Both Admin staff and Clinical staff can see what paper consents have been entered/tracked into Avatar by looking at the Admin Paper Consent Tracking Widget, including any consents that have been retracted.