



# Managing Patient Consent

**October 16, 2024**

**v2.6**

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## 1. Overview

The consent management application (CMA) is a tool that allows users to update HEALTHeLINK Consent without having to access the patient's medical record. CMA is a separate application from HEALTHeLINK.

## 2. Help and Support

### For HEALTHeLINK™ Support

<b>24/7 Help Desk Support</b>	<b>877.895.4724</b>
<b>Local Help Desk Support</b>	<b>716.842.6343</b>

**Additional training materials are available at**

[HEALTHeLINK Patient Consent Tip Sheet for Participant](#)

<https://wnyhealthelink.com/for-providers/training-materials/training-videos/>

<https://wnyhealthelink.com/for-providers/training-materials/webinars/>

**Any update to a patient's consent must have a corresponding consent form.** All consent forms must be sent to HEALTHeLINK within 3 business days. Forms can be faxed to the number on the form (716) 206-0039.

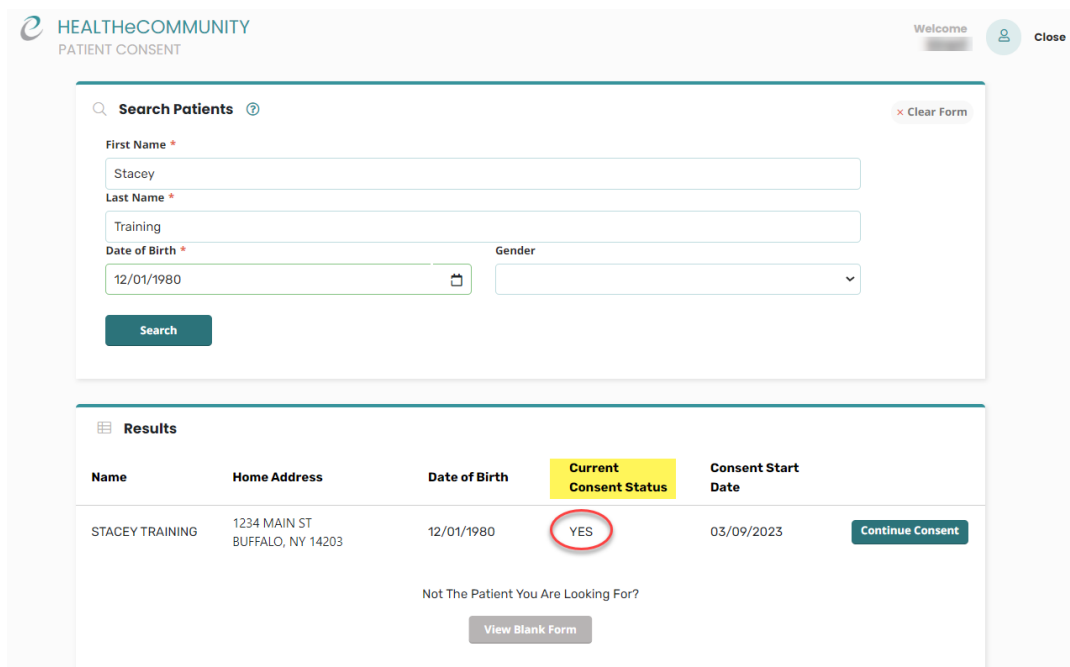
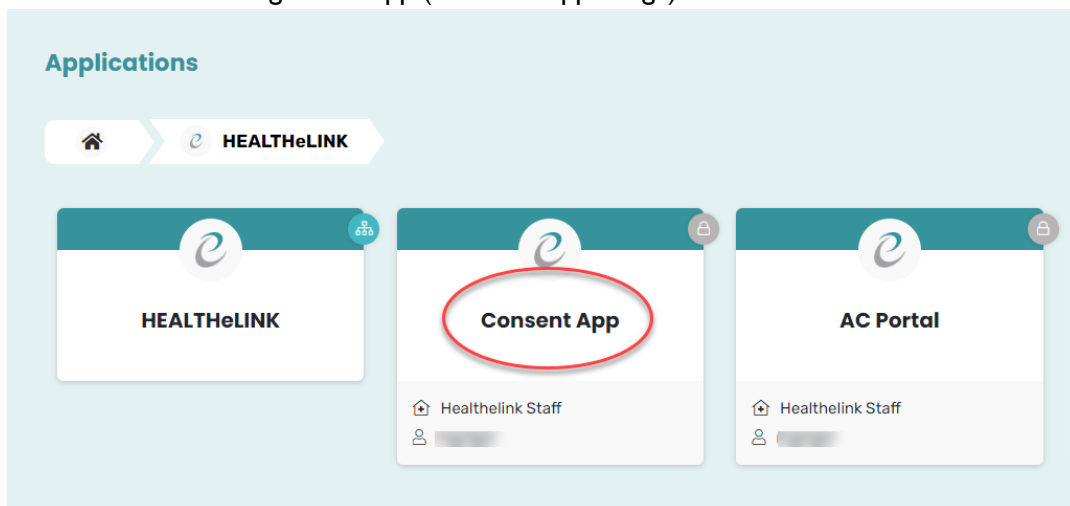
**If there is an immediate need to manage the form to allow the access of patient records,** fax the completed form to HEALTHeLINK at (716) 206-0996 and call (716) 206-0993 option 2 to inform HEALTHeLINK staff that the form requires immediate attention. This option is available Monday thru Friday 7:30am-5:00pm ET.

## 3. Checking for Patient Consent in HEALTHeLINK and HEALTHeNET

Patient consent can be managed 1 of 3 ways:

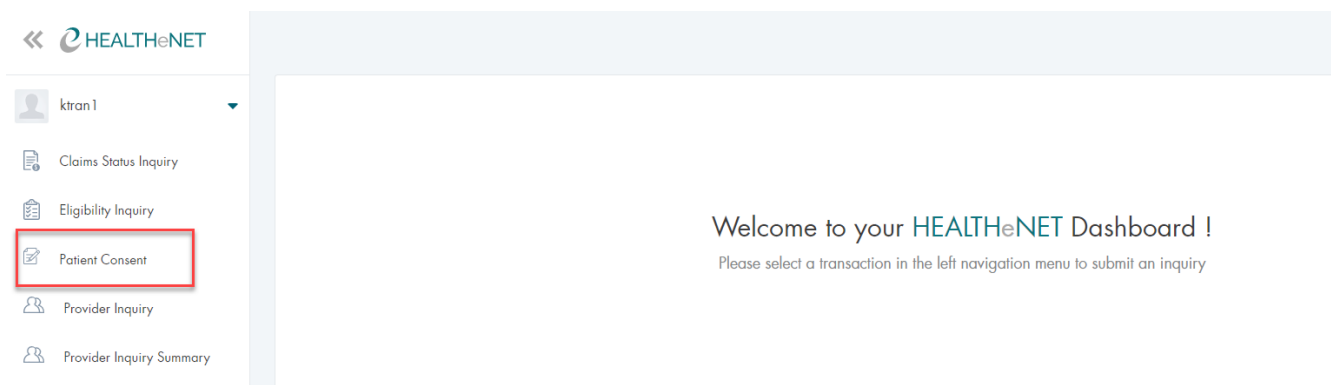
You may search a Patient Consent:

- I. CMA: Consent Management App (Consent App Badge) in HEALTHeLINK.



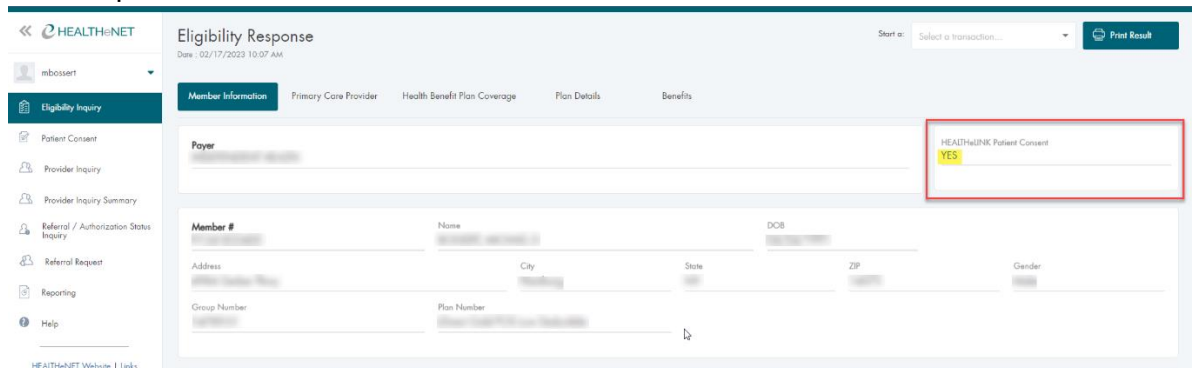
## 2. HEALTHeNET

- Please reach out to your Account Manager if you do not have Patient Consent under HEALTHeNET
- Log into HEALTHeNET and click on "Patient Consent".



### 3. HEALTHeNET Eligibility

- a. Please reach out to your Account Manager if you do not have Patient Consent under HEALTHeNET.
- b. Log into HEALTHeNET and click on “Eligibility Inquiry”.
- c. Search a patient.



- d. The highlighted text in screenshot is clickable and will take you to the CMA retaining the search criteria (keeping patient context/demographics).

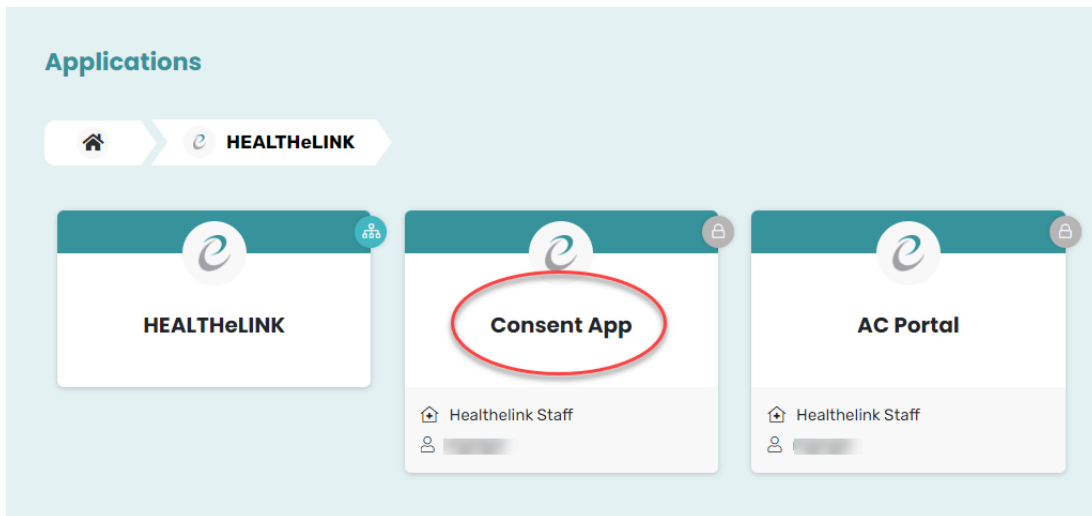
### 4. Consent Definitions

1. **YES** – Allows access to your health information by all treating providers.
2. **YES, EXCEPT Specific Participant(s)** – Allows access to your health information by all treating providers EXCEPT the providers selected.
3. **YES, ONLY Specific Participant(s)** – Allows access to your health information ONLY to the providers selected. (At least one provider needs to be selected or you will get an error message when updating).
4. **NO, EXCEPT in an emergency** – Does not allow access to your health information EXCEPT in the case of an emergency. (At least one provider needs to be selected or you will get an error message when updating).
5. **NO, EVEN in an emergency** – Does not allow access to your health information in any case.

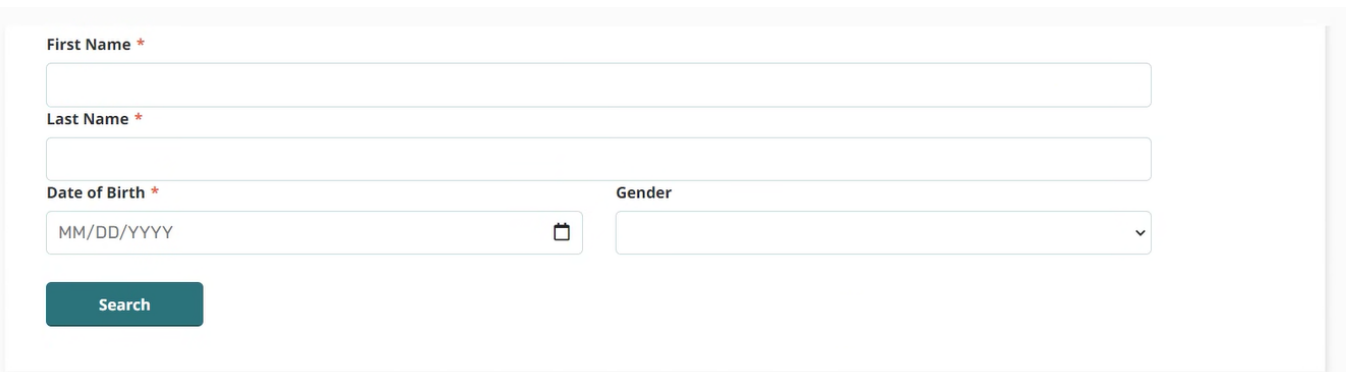
## 5. Managing Patient Consent in CMA

### 5.1. Searching for a Patient

1. Log into HEALTHeCOMMUNITY Portal.
2. Select the CMA (Consent App) badge.
  - a. If you have multiple CMA accounts, you must choose the badge that displays the organization you are associated with for the patient you are updating.



3. Enter search criteria
  - a. First Name, Last Name, and Date of Birth are required. Gender is not required.
  - b. In the case of hyphenated names, a hyphen or space may or may not be needed between the names (Jones-Smith vs. Jones Smith vs. JonesSmith).
  - c. A suffix may or may not be needed as well.



The screenshot shows a search form with the following fields:


- First Name \***: A text input field.
- Last Name \***: A text input field.
- Date of Birth \***: A date input field with a calendar icon and the placeholder text 'MM/DD/YYYY'.
- Gender**: A dropdown menu.
- Search**: A teal button.


4. Click [SEARCH]

Search Patients ⓘ x Clear Form

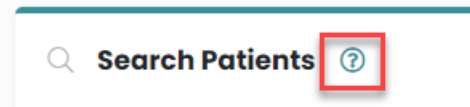
First Name \*

Last Name \*

Date of Birth \*   Gender



5. View Tip Sheet: Use this to reference the options of managing consent by clicking on the “?” next to “Search Patients”



Help x

## Patient Consent Tip Sheet

**UPDATE PATIENT CONSENT**

Users may use this feature to lookup and update consent for a single patient.

**Patient Information - Required**

Enter all of the following fields:

- First Name
- Last Name
- Date of Birth

If one or more matches are found, the consent status will be displayed. If the consent status is “YES” no action is necessary. If consent status is “NO” or “EMERGENCY\_ONLY” and the patient wishes to change this, you can click the “PRINT CONSENT” button to populate a consent form with the patient information prefilled. Collect the patient signature and send HEALTHeLINK the completed form to finish processing. If the status is “UNKNOWN” you can update the status from this link using the guidelines below.

**Select “CONTINUE CONSENT”**

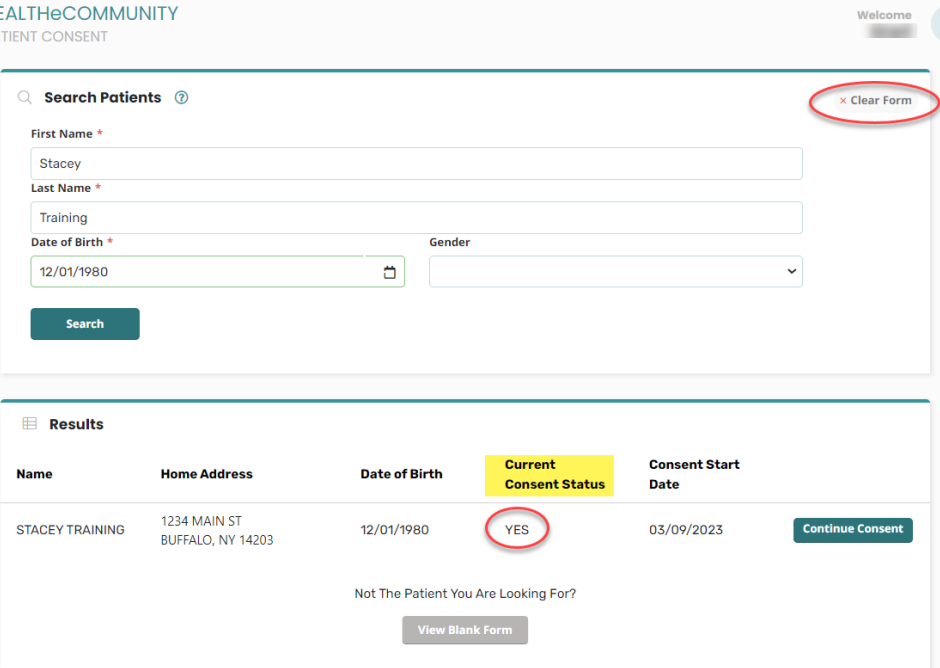
**Select the appropriate value:**

- Yes - Allows access to your health information by treating providers.
- Yes EXCEPT Specific Participant(s) - Allow access to your health information by all treating providers EXCEPT the

## 5.2. Updating Consent Values

### 5.2.1 YES Consent

The search results will display the patient's current consent status as well as the date the consent was signed. If consent status is **YES**, there is no need to collect a new consent unless the patient would like to change their consent value (Follow steps under 4.3). You can then choose CLEAR FORM as no further action is required.



HEALTHeCOMMUNITY  
PATIENT CONSENT

Welcome [User Name]

Search Patients ⓘ

× Clear Form

First Name \*  
Stacey

Last Name \*  
Training

Training  
Date of Birth \* 12/01/1980  
Gender

Search

Results

Name	Home Address	Date of Birth	Current Consent Status	Consent Start Date
STACEY TRAINING	1234 MAIN ST BUFFALO, NY 14203	12/01/1980	YES	03/09/2023

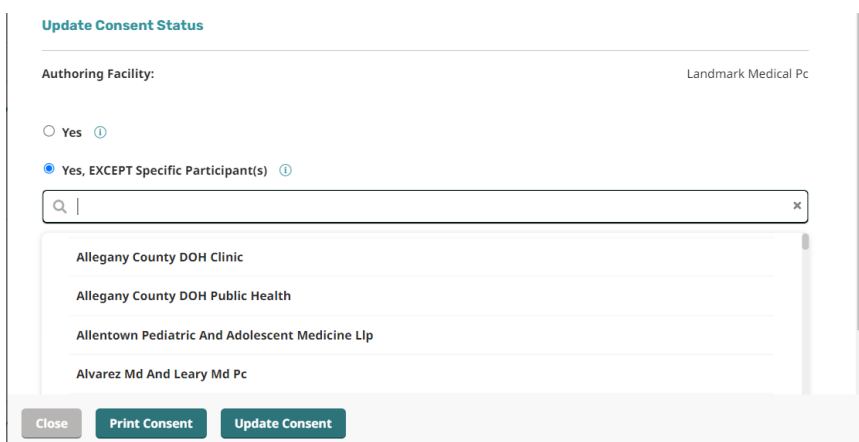
Continue Consent

Not The Patient You Are Looking For?  
View Blank Form

### 5.2.2 YES EXCEPT, and YES ONLY Consent

“Yes, EXCEPT Specific Participant(s)” and “Yes, ONLY Specific Participant(s)”

1. When a patient updates their consent value to Yes, Except or Yes, Only, you will be prompted to select which participant or participants are applicable.



Update Consent Status

Authoring Facility: Landmark Medical Pc

Yes ⓘ

Yes, EXCEPT Specific Participant(s) ⓘ

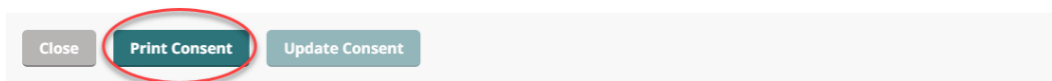
Search


- Allegany County DOH Clinic
- Allegany County DOH Public Health
- Allentown Pediatric And Adolescent Medicine Llp
- Alvarez Md And Leary Md Pc

Close Print Consent Update Consent

2. Once you have selected the applicable participant(s), you will need to click “Print Consent”.





 consent\_form\_Refe....pdf ^

3. A .pdf form will download. Click on the .pdf to pull up the consent.

4. The downloaded .pdf will reflect the chosen participant(s)

<b>S E L E C T</b>	<b>My Consent Choice. Only ONE box is checked to the left of my choice. I can fill out this form now or in the future. I can also change my decision at any time by completing a new form.</b>	
	<input type="checkbox"/> <b>1. YES</b>	<b>I GIVE CONSENT</b> to all current and future Participants, who are involved in my care, to access ALL of my electronic health information through HEALTHeLINK.
<input checked="" type="checkbox"/> <b>2. YES, EXCEPT SPECIFIC PARTICIPANT(S)</b>	<b>I GIVE CONSENT</b> to all current and future Participants, who are involved in my care, to access ALL of my electronic health information through HEALTHeLINK, <b>EXCEPT</b> the Participant(s) listed below. Participant's Name (Provider Office): _____ Participant's address or phone number: _____ <input type="text" value="Buffalo Medical Group"/>	

5. Once form is printed, obtain the patient’s signature and consent value option.

**Important:** This must be the patient’s actual signature via pen & paper, or a stylus & signature pad.

6. Once you have obtained the patient’s signature on the new consent form, you will then select the new consent value on the CMA Page and click “Update Consent”.

7. After clicking on “Update Consent”, an Attestation will appear for confirmation, where you will need to click on “Continue”.


**HEALTHeLINK Consent Update Attestation**

I have obtained a valid consent form, signed and dated by the patient, and the Date of Signature is valid and is more current than previous date of consent, if applicable. That form has been or will be faxed to HEALTHeLINK at 716-206-0039.

8. After clicking on “Continue” A pop-up message will briefly display in the bottom right corner of your screen, showing confirmation of a successful update of consent. You will now have access to the patient’s records.



9. **Important:** Although the consent status has already been updated, you will still need to Fax the signed consent form to HEALTHeLINK’s dedicated Fax Line at 716-206-0039 (This number can also be found at the bottom of the consent form).

	01/26/2023	Your practice name here Entry Consent Received By
Rev. 1 (11-15-18)	2475 George Urban Boulevard, Suite 202, Depew New York 14043 / Dedicated Fax Line: 716-206-0039 Page 1 of 2	CNA-01

## 5.2.3 UNKNOWN Consent

If a patient has a current consent status of UNKNOWN, you will need to click the CONTINUE CONSENT button to obtain and update their current consent status.

Name	Home Address	Date of Birth	Current Consent Status	Consent Start Date
STACEY TRAINING	3980 SHERIDAN DR WEST SENECA, NY 14224	12/01/1980	UNKNOWN	<a href="#">Continue Consent</a>

- I. Choose which option the patient would like their consent updated to by clicking the button next to the desired consent status. To review the definitions of each consent status, hover

over the  symbol.

### Edit Patient Consent

**Patient Information**

Name: \_\_\_\_\_

Home Address: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Current Consent Status: UNKNOWN

Consent Start Date: N/A

**Update Consent Status**

Authoring Facility: \_\_\_\_\_

Yes ⓘ

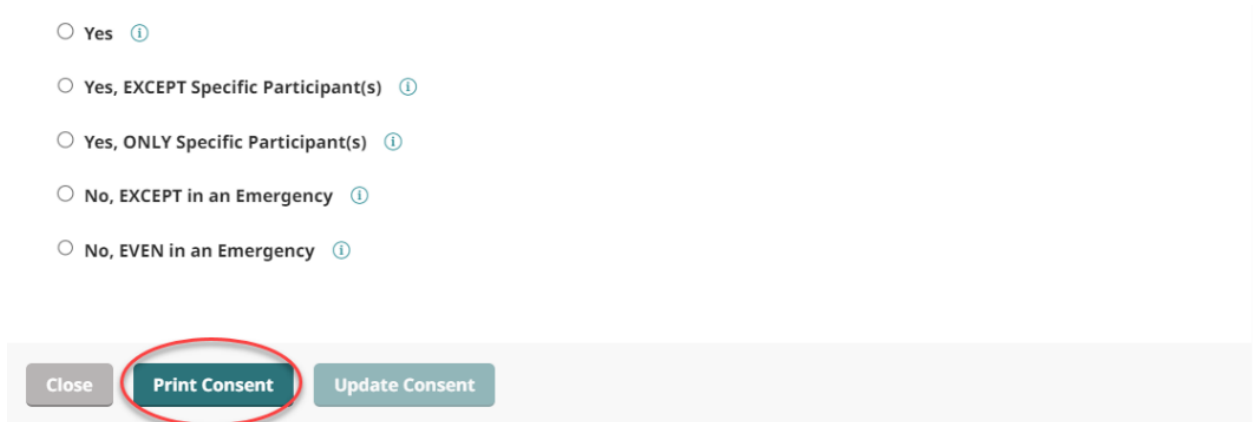
Yes, EXCEPT Specific Participant(s) ⓘ

Yes, ONLY Specific Participant(s) ⓘ

No, EXCEPT in an Emergency ⓘ

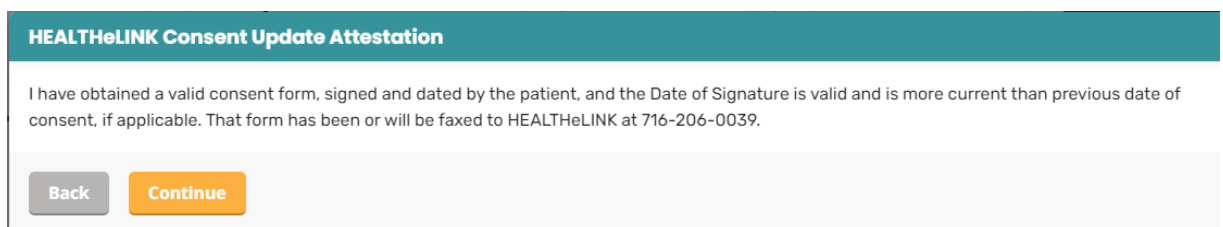
No, EVEN in an Emergency ⓘ

2. Click on the “Print Consent” button to populate the computer-generated consent form. (This will automatically pull the patient’s demographi

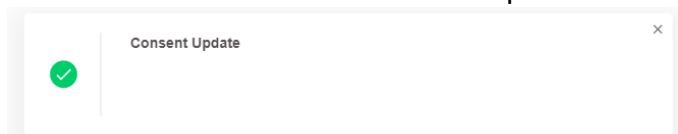


3. A .pdf form will download. Click on the .pdf to pull up the consent.


4. Once form is printed, obtain the patient’s signature and consent value option.  
**Important:** This must be the patient’s actual signature via pen & paper, or a stylus & signature pad.
5. Once you have obtained the patient’s signature on the new consent form, you will then select the new consent value on the CMA Page and click “Update Consent”.
6. After clicking on “Update Consent”, an Attestation will appear for confirmation, where you will need to click on “Continue”.



7. After clicking on “Continue” A pop-up message will briefly display in the bottom right corner of your screen, showing confirmation of a successful update of consent. You will now have access to the patient’s records.

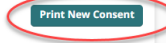


8. **Important:** Although the consent status has already been updated, you will still need to Fax the signed consent form to HEALTHeLINK’s dedicated Fax Line at 716-206-0039 (This number can also be found at the bottom of the consent form).

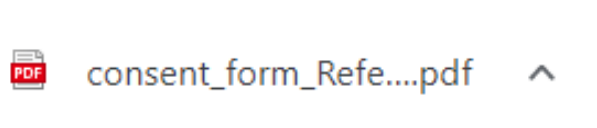
	01/26/2023	Your practice name here Entity Consent Received By
Rev. 1 (11-15-18)	2475 George Urban Boulevard, Suite 202, Depew New York 14043 / Dedicated Fax Line: 716-206-0039 Page 1 of 2	<b>OMA-01</b>

## 5.2.4 NO Consent


1. If the patient is currently consented as either “No, EXCEPT in an emergency” (Will appear as “Emergency Only” or “No, EVEN in an emergency” (Will appear as “NO”), there are a series of steps that need to be taken to have this consent properly updated.
2. If a “NO” or “EMERGENCY ONLY” patient would like to change their consent after discussing the options with the patient, click on the “Print New Consent” button to populate the computer-generated consent form. (This will automatically pull the patient’s demographics).

Name	Home Address	Date of Birth	Current Consent Status	Consent Start Date	
			EMERGENCY_ONLY	07/07/2021	
Not The Patient You Are Looking For?					
<a href="#">View Blank Form</a>					

3. A .pdf form will download. Click on the .pdf to pull up the digitally populated consent form



4. Once form is printed, obtain the patient’s signature and consent value option. **Important:** This must be the patient’s actual signature via pen & paper, or a stylus & signature pad.
5. Due to compliance requirements, **you are unable to update a “NO” consent in real time. It must be updated by HEALTHeLINK Consent Staff unless you are an overnight emergency facility who has been given “All Status Consent” override.**
6. In order to have the patient’s consent status updated from a “No” or “Emergency Only” to a “Yes”, the consent form needs to be faxed/sent to HEALTHeLINK’s dedicated Fax Line at 716-206-0039 (This number can also be found at the bottom of the consent form).

	01/26/2023	Your practice name here Entity Consent Received By
Rev. 1 (11-15-18)	2475 George Urban Boulevard, Suite 202, Depew New York 14043 / Dedicated Fax Line: 716-206-0039 Page 1 of 2	<b>OMA-01</b>

7. IF the patient is currently present and waiting for treatment, you may also utilize the EMERGENCY CONSENT FAX LINE: (716) 206-0996.

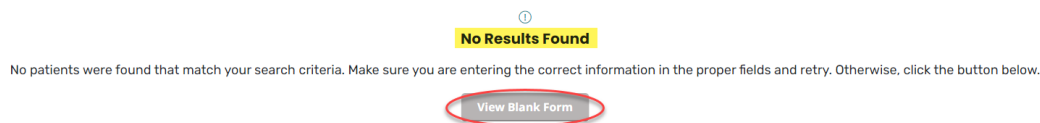
- a. After faxing the signed consent form, you can then call our Consent Team to notify them of the incoming fax. Please call (716) 206-0993, option 2. (The Consent Team is available Monday – Friday from 7:30am – 5:00pm EST.
- b. Once the team has made this update, you should have access to these patient records within 15 minutes.

## 5.2.5 Patient Not Found in HEALTHeLINK

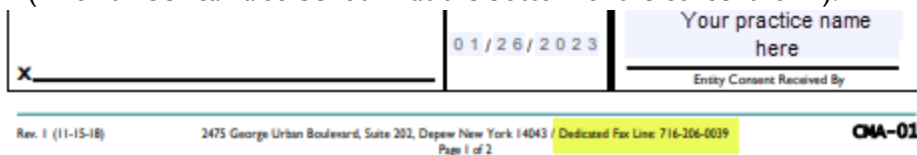
1. If there is no corresponding patient listed in HEALTHeLINK, you can generate a blank HEALTHeLINK consent form.

**Important: Before proceeding with this step, make sure you have entered the patient information correctly. The most common error is mixing up patient first and last name or misspelling. The form will print matching the search criteria that you have provided. In the case of hyphenated names, a hyphen or space may or may not be needed between the names (Jones-Smith vs. Jones Smith vs. JonesSmith). A suffix may or may not be needed as well.**

2. To generate a consent form for a non-HEALTHeLINK patient, Click [\[VIEW BLANK FORM\]](#)



3. A PDF consent form will be downloaded. The generated form will be pre-populated with the provided search criteria (patient name, date of birth, gender) and your practice information.
4. Once form is printed, obtain the patient's signature and consent value option. **Important: This must be the patient's actual signature via pen & paper, or a stylus & signature pad.**
5. Fax the completed form to HEALTHeLINK's dedicated Fax Line at 716-206-0039 (This number can also be found at the bottom of the consent form).



The screenshot shows the top portion of a consent form. It includes a signature line with an 'x' mark, a date field containing "01/26/2023", and a field for "Your practice name here" with the subtext "Entity Consent Received By". At the bottom of the form, there is footer information: "Rev. 1 (11-15-18)", "2475 George Urban Boulevard, Suite 202, Depew New York 14043 / Dedicated Fax Line: 716-206-0039", and "OMA-01".

6. Please note that there is not an option to update the patient consent for patients not found in HEALTHeLINK. HEALTHeLINK will determine if there is a discrepancy with a current patient, or create a new patient to apply the consent.

## 6. Important Things to Know When Having a Patient Fill out a new Consent Form

1. Once form is printed, obtain the patient's signature and consent value option. **Important: This must be the patient's actual signature via pen & paper, or a stylus & signature pad.**

2. When filling out the form patients can only select one option, when selecting the Yes, EXCEPT or Yes, ONLY, the participant name and address/phone number are required for us to apply consent.
3. If you find that you have a large patient population that speaks a language other than English, our consent form is translated into 11 different languages and we will do our best to accommodate your request
4. If a patient requests a copy of the consent form signed at your practice, you are required to provide them with a copy. This includes historical consent forms
5. If a patient has questions about the consent form, they are allowed to have those questions addressed prior to signing the form. If the practice that is collecting the form is unsure how to answer the patient's questions, the patient can contact HEALTHeLINK
6. **BOTH PAGES OF THE CONSENT FORM NEED TO BE PRESENTED TO THE PATIENT PRIOR TO SIGNING TO ALLOW THE PATIENT TO GIVE INFORMED CONSENT**

## 7. Sample Consent Form

HEALTHeLINK™		Authorization for Access to Patient Information Through HEALTHeLINK™	
<b>Patient First Name</b> STACEY			
<b>Patient Last Name</b> TRAINING			
<b>Date of Birth</b> 12/01/1980	<b>Patient Address</b> 3980 SHERIDAN DR WEST SENECA NY 14224		<b>Gender</b> <input type="checkbox"/> Male <input checked="" type="checkbox"/> Female
<p>I request that health information regarding my care and treatment be accessed as set forth on this form. I can choose whether or not to allow Participating HEALTHeLINK Providers and Payers ("Participants") who are involved in my care to obtain access to my medical records through the health information exchange organization called HEALTHeLINK. If I give consent, my medical records from different places where I get health care can be accessed using a statewide computer network. HEALTHeLINK is a not-for-profit organization that shares information about people's health electronically and meets the privacy and security standards of HIPAA and New York State Law. To learn more visit HEALTHeLINK's website at <a href="http://wnyhealthelink.com/">http://wnyhealthelink.com/</a>.</p> <p>The choice I make in this form will NOT affect my ability to get medical care. The choice I make in this form does NOT allow health insurers to have access to my information for the purpose of deciding whether to provide me with health insurance coverage or pay my medical bills.</p>			
S E L E C T  O N L Y  O N E	<b>My Consent Choice. Only ONE box is checked to the left of my choice. I can fill out this form now or in the future. I can also change my decision at any time by completing a new form.</b>		
	<input type="checkbox"/> <b>1. YES</b>	<b>I GIVE CONSENT</b> to all current and future Participants, who are involved in my care, to access ALL of my electronic health information through HEALTHeLINK.	
	<input type="checkbox"/> <b>2. YES, EXCEPT SPECIFIC PARTICIPANT(S)</b>	<b>I GIVE CONSENT</b> to all current and future Participants, who are involved in my care, to access ALL of my electronic health information through HEALTHeLINK, <b>EXCEPT</b> the Participant(s) listed below. Participant's Name (Provider Office): _____ Participant's address or phone number: _____ _____ _____	
	<input type="checkbox"/> <b>3. YES, ONLY SPECIFIC PARTICIPANT(S)</b>	<b>I GIVE CONSENT ONLY</b> to the specific Participant(s) listed below to access ALL of my electronic health information through HEALTHeLINK. Participant's Name (Provider Office): _____ Participant's address or phone number: _____ _____ _____	
	<input type="checkbox"/> <b>4. NO, EXCEPT IN AN EMERGENCY</b>	<b>I DENY CONSENT EXCEPT IN A MEDICAL EMERGENCY</b> for current and future Participants to access my electronic health information through HEALTHeLINK.	
<input type="checkbox"/> <b>5. NO, EVEN IN AN EMERGENCY</b>	<b>I DENY CONSENT</b> for current and future Participants to access my electronic health information through HEALTHeLINK for any purpose, <b>even</b> in a medical emergency.		
I understand that my information may be accessed in the event of an emergency, unless I complete this form and check box #5, which states that I deny consent even in a medical emergency. I understand that upon my request, HEALTHeLINK is required to provide me with a list of disclosures of my electronic health information under the terms of this form. My questions about this form have been answered and I have been provided a copy of this form if I request it.		<b>Print Name of Patient's Legal Representative (if applicable)</b> _____ <b>Relationship of Legal Representative to Patient (if applicable)</b> <input type="checkbox"/> Parent <input type="checkbox"/> Healthcare agent/proxy <input type="checkbox"/> Guardian <input type="checkbox"/> Other _____	
<b>Signature of Patient or Patient's Legal Representative</b> _____ X		<b>Signature Date</b> _____ / ____ / ____ <b>Practice Name Here</b> _____ Entity Consent Received By	

## 8. Faxing HEALTHeLINK Consents

- **Non-Urgent Consent Updates:**
  - Fax the signed and dated computer-generated form to our HEALTHeLINK Consent line at (716) 206-0039 within 3 business days.
  
- **Emergency Consent Updates: *This fax line can only be used if the patient is currently in the office AND would like to change their consent from a “No” / “Emergency Only” to a “Yes”.***
  - Fax the signed and dated computer-generated form to our **Emergency** HEALTHeLINK Consent line at (716) 206-0996.
  - Call the HEALTHeLINK Consent Department at (716) 206-0993, option 2 to notify that there is an emergency consent waiting to be updated. Please note that the phones will only be monitored during regular business hours of Monday–Friday from 7:30am to 5:00pm EST.

## 9. Helpful Tips

- A “YES” Consent is valid community-wide covering the 8 counties of Western New York. You are not required to collect a new consent unless the patient chooses to change the value. The CMA will prevent a consent from being updated from a Yes to a Yes.
  
- **FOR PEDIATRIC PATIENTS ONLY** – If a parent or guardian has signed the minor’s consent, on the day of the patient’s 18<sup>th</sup> Birthday, the consent value will automatically revert to an “UNKNOWN”. The patient must then sign a new consent as an adult.
  
- If you are experiencing any issues finding a patient in the CMA, please check the spelling, DOB and the placement of the First Name/Last Name. If issues continue, call the HEALTHeLINK Help Desk.
  
- To maintain access to the Consent Management (CMA) badge all users are required to login to this badge every 180 days. Failure to do so will result in deactivation.

See all Consent Tips : [HEALTHeLINK Patient Consent Tip Sheet for Participant](#)

**If you have any questions, please call the HEALTHeLINK Help Desk**

**at 1-877-895-4724 or (716) 842-6343**