

Consent Summary

The Consent Summary modules allows users to input any consents, whether verbal or written into the clients' file. These consents are then used by the "Service Summary" module to provide a quick overview of any consents in a client's file.

1. Access the CRMS Search Engine as described above on page 16.
2. Locate the desired client and open their chart.
3. From the list of modules, click on **Consent Summary** as shown below.

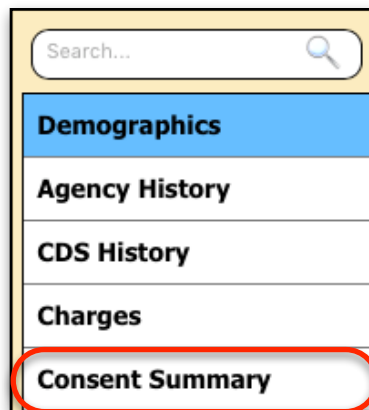


Figure 271 - Accessing Consent Summary

4. The Consent Summary module will then appear on screen.

A screenshot of the 'Consent Summary' module for a client named 'Kauffman, Alex (04055415-02) - Active'. The interface has a yellow background. At the top left, there is a red box with the text 'NO CURRENT RELEASES'. Below this are several input fields: 'Type:' with a dropdown arrow, 'Date:', 'Consent To', 'Expiry Date:', 'Contact', and 'Never Expires' (a checkbox). There is also a 'Revoke Date:' field. Below these fields is a large text area labeled 'Description of Consent/Restrictions:'. At the bottom, there is a table with columns: 'Admission', 'Type', 'Initiated', 'Expired', 'Revoked', 'Consent To', and 'File Name'. The table is currently empty. At the very bottom, there is a checkbox labeled 'Show for all admissions'.

Figure 272- Consent Summary Module



Should a user not see the "Consent Summary" module, verify their access rights.

5. Fill out the necessary drop downs as shown in Figure 273.

NO CURRENT RELEASES

Type: Verbal Date: May 18, 2016

Consent To: Dr. Jones Expiry Date: May 18, 2017

Contact: 613-562-9635 ☐ Never Expires

Revoke Date:

Description of Consent/Restrictions: able to discuss medical plan with doctor

Figure 273 - Inputting Data into Consent Summary Module

6. Once satisfied with the changes, click **Save** to finalize the process. The consent will then be saved and appear in the review area below. This is demonstrated below.

CURRENT RELEASES EXIST

Type: Date:

Consent To: Expiry Date:

Contact: ☐ Never Expires

Revoke Date:

Description of Consent/Restrictions:

Admission	Type	Initiated	Expired	Revoked	Consent To	File Name
2	Verbal	18-May-2016	18-May-2017		Dr. Jones	

☐ Show for all admissions

Figure 274 - Successfully Saved Consent

7. Note in Figure 274 above, that the “consent label” has change from **red** to **green** to identify there is a consent in this clients’ file.

8. This is also reflected on the “Service Summary” module in Figure 275. Refer to page 81 for how to access the “Service Summary”.

Service Summary - Kauffman, Alex (4055415)

Program	Worker	Pending Assessment	Intake Assessment	Un-Pending	Entry	Exit
Case Management	Christian Gosselin	2016-05-03				

CURRENT RELEASES EXIST
Last Contact: None

Figure 275 - Newly Added Consent Visible in Service Summary Module

Modifying an Existing Consent

1. To modify an existing consent, refer to page 130 for how to access the Consent Summary module.
2. From the review list, select the desired consent.

Admission	Type	Initiated	Expired	Revoked	Consent To	File Name
2	Verbal	18-May-2016	18-May-2017		Dr. Jones	

Figure 276 - Modifying an Existing Consent

3. Modify the necessary data, and when satisfied with the changes, click **Save** to finalize the process.
4. In Figure 277 below, the user removed the expiration date.

CURRENT RELEASES EXIST

Type: Verbal Date: May 18, 2016

Consent To: Dr. Jones Expiry Date:

Contact: 613-562-9635 ☒ Never Expires

Revoke Date:

Description of Consent/Restrictions: able to discuss medical plan with doctor

Figure 277 - Saving a Modified Consent

Attaching Scanned Consent Document

If desired, users can also digitally attach the signed and scanned consent form.



Contact your IT department regarding how to scan a document. Once the scan is available for your use, continue with these steps.

1. Access the Consent Summary module as described on page 130.
2. Locate and click on the desired consent which the scanned document will be added.
3. Click on the **paperclip icon** as identified in Figure 278.

Admission	Type	Initiated	Expired	Revoked	Consent To	File Name
2	Verbal	18-May-2016	18-May-2017		Dr. Jones	

Figure 278 - Attaching Scanned Consent Document

4. An Attachment Window will then appear on screen as shown in Figure 279.

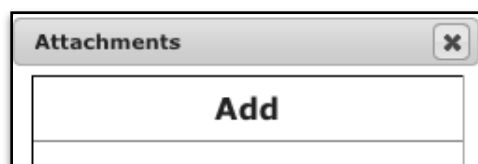


Figure 279 - Adding Attachment to Consent

5. Click **Add** to continue the process.

- A window will appear as demonstrated in Figure 280 to allow the user to locate their desired attachment.

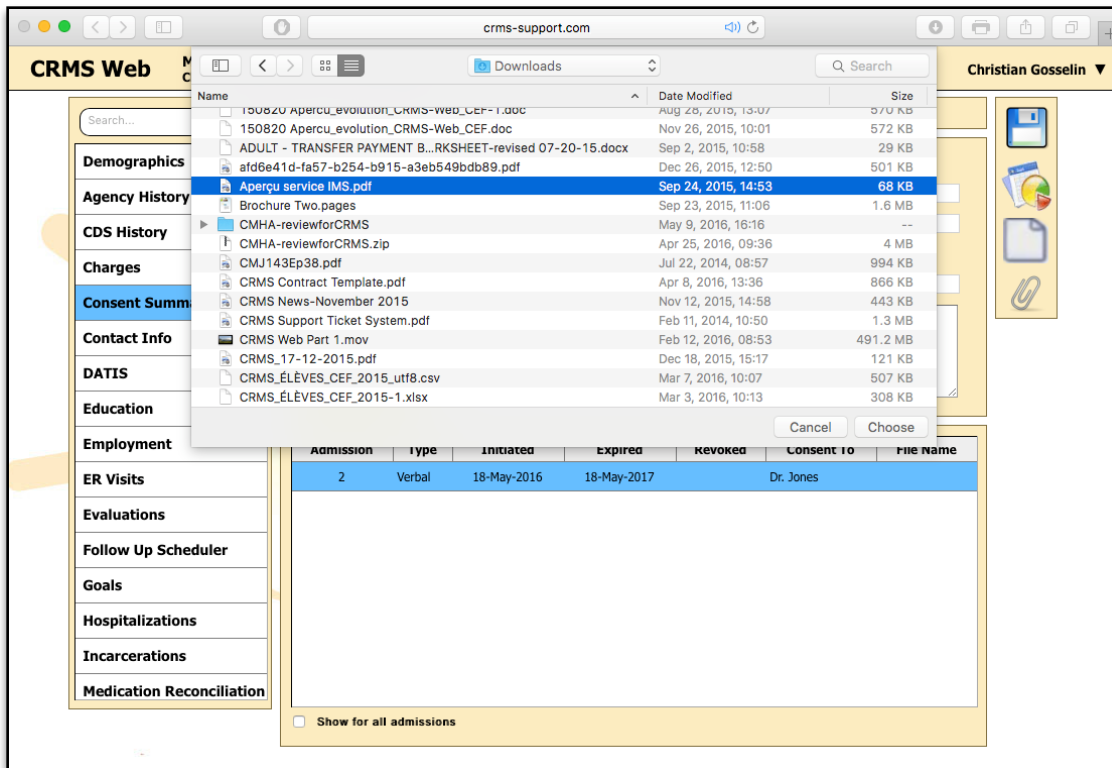


Figure 280- Navigating to Locate Scanned Attachment

- Once the user has located the desired file, click **Choose** to finalize the process.
- A message box will appear confirming that the process was successful.

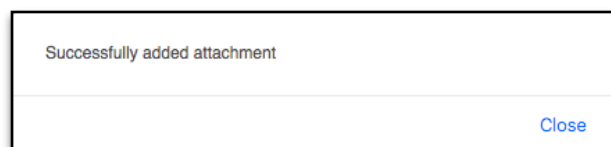


Figure 281 - Successfully Added Scanned Consent

- The Review section of the Consent Summary module will refresh to then display the file name as shown below in Figure 282.

Admission	Type	Initiated	Expired	Revoked	Consent To	File Name
2	Verbal	18-May-2016	18-May-2017		Dr. Jones	Aperçu service IMS.pdf

Figure 282 - Reviewing Newly Added Scanned Attachment

Reviewing a Scanned Attachment

1. Once the scanned attachment has been added to the Consent Summary, users can follow these steps in order to review.
2. Access the Consent Summary module as described on page 130.
3. From the Review Section, locate the particular consent.
4. Click on the paperclip icon to bring up the Attachments window.
5. Click on **View** as shown in Figure 283.

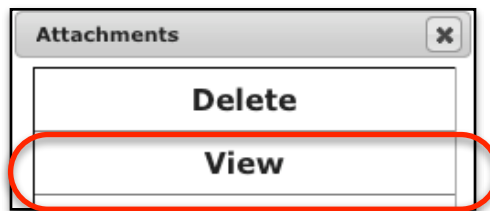


Figure 283 - Reviewing a Scanned Attachment

6. The scanned attachment will then be automatically downloaded and opened in a new tab within the web browser.

Deleting a Scanned Attachment

1. Once the scanned attachment has been added to the Consent Summary, users can follow these steps in order to delete an attachment.
2. Access the Consent Summary module as described on page 130.
3. From the Review Section, locate the particular consent.
4. Click on the paperclip icon to bring up the Attachments window.
5. Click on **Delete** as shown in Figure 284.

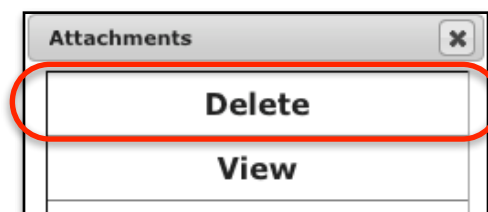


Figure 284 - Deleting a Scanned Attachment

6. A message will appear confirming the process was successful.

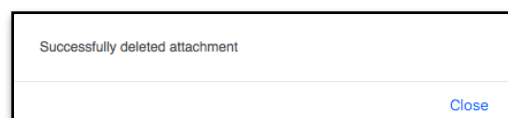


Figure 285 - Successfully Deleted Attachment