



Virginia Garcia Memorial
HEALTH CENTER

SECTION: Admin\ HIPAA

EFFECTIVE DATE: 5/1/16

TITLE: Confidential Communication with Patients

APPROVED BY: QI committee

NEXT REVIEW DATE: 3/2018

PURPOSE:

All patient records are confidential; however, patients may choose to limit communications or set up alternative means of communication with the Virginia Garcia Memorial Health Center (VGMHC). This procedure addresses how we comply with these patient requests.

SCOPE:

This procedure applies to all VGMHC sites and functions.

RESPONSIBILITY:

The HIPAA Privacy Officer is responsible for ensuring that VGMHC has a process to comply with requests for confidential communications. All VGMHC staff is responsible for implementing this procedure.

CRITERIA FOR CONFIDENTIAL VISITS

The following visit types can be marked confidential at the patient's request:

- Sexually Transmitted Infection (STI) including HIV/AIDS
- Pregnancy testing
- Family planning/contraceptives
- Domestic violence
- Abuse (physical, sexual, or emotional)
- Any visit that could impact patient safety (provider discretion)

PROCEDURE FOR FRONT DESK:

PATIENT APPOINTMENTS: Patient requests not to be contacted by clinic by mail or telephone.

1. During Registration, Front Desk employee asks patient "how may we contact you?"
2. Patient states that they may not be contacted by the clinic either by mail or telephone.
3. On the Additional Info screen, select the appropriate patient type of confidential.

Zzyork, Samantha
 Preferred Name: None
 MRN: E1877300
 Female, 41 year old, 06/01/1970

PCP: None
 Primary Location: CASCADE EAST FAMILY ...
 Language: English
 Need Interp: No
 PT Type: Confidential
 HIPAA: NO

Patient FYIs: None
 MyChart: Inactive

1414 SW 24th AVENUE, PORTLAND OR 97204
 Home: 999-999-9999
 Work: None
 Cell: None

Registration

Appt Desk
 Registration

Additional Patient Information

Patient type: 1 Confidential
 Patient status: Alive
 Marital status:
 Country of Origin:
 Tobacco Use:
 Prenatal Care:
 Baby DOB:
 WIC Enrollment:
 Family Annual:
 MCD Subscriber ID:
 Permanent comments: 1

Other MRN: 1
 Date of death:
 Appointment letter:
 Date of Entry:
 Estimated Due Date:
 Prenatal Completed:
 Baby Weight grams:
 Family Size:
 % FPL:
 Disability Status: 1 No [2]

Documents

Type of Document	Description	Status	Date...	Location

Expand Scan Delete Show all documents

093 Restore Response Notification Back Next Finish

Patient Types

999C – Confidential for Family Planning – no contact from the clinic related to Family Planning services.

Confidential – Full confidentiality – no calls or correspondence from the clinic.

Confidential – MH – No contact from the clinic related to mental health services.

Non-confidential – Clinic may contact the patient.

UNK Confidential – Information has not been collected.

Category Select

Search:

Title
999C
Confidential
Confidential-MH
Dismissed
Foster
Non Confidential
Restricted
Share of Cost
Unk Confidential
Violent

10 categories loaded.

Accept Cancel

- The patient type confidential in the first position will prevent billing information from being sent via the interface with lab orders.
- Marking a patient Restricted or Dismissed in this area will lock down the patient throughout the system – not advised.
- Violent is not used in patient type. This information is managed in the Permanent Comments field, which is visible throughout the patient record and across the service areas.

Front desk staff will inform the patient that he/she must let us know **at each appointment at the time of check-in** if he/she would like the visit to be confidential; otherwise we will default to non-confidential.

The Patient type can also be set in Cadence:

1. On the Appointment Desk select Patient Options menu to update patient record.

Zzyork, Samantha
 Preferred Name: None
 MRN: E1877300
 Female, 41 year old, 06/01/1970

PCP: None
 Primary Location: CASCADE EAST FAMILY ...
 Language: English
 Need Interp: No
 PT Type: Confidential
 HIPAA: NO

Patient FYIs: None
 MyChart: Inactive

1414 SW 24th AVENUE, PORTLAND OR 97204
 Home: 999-999-9999
 Work: None
 Cell: None

Appointment Desk for Zzyork, Samantha [E1877300]

Make Appt Walk In Quick Appt Classes Wait List History Week View Dept Calendar Reg New Recall Pt Recalls Fin Documents Scan Barcode

Patient Demographics for Zzyork, Samantha [E1877300]

DOB: 6/1/1970 SSN: 999-99-9999 Health Maintenance
 Age: 41 yrs Sex: Female
 Home Phone: 999-999-9999 Mobile Phone:
 Work Phone: E-mail:
 Address: 1414 SW 24th AVENUE
 City/State/Zip: Portland, OR 97204
 Country: United States of America
 Derm Comments:

Future Past

Date	Time	Len	Dept	Provider	Visit Type	Notes
5/17/2012 Thu	8:15a	15	OFOHCRHC [848001001]	CANBY, PAUL [8480059]	OFFICE VISIT SHORT (1)	Confidentiality

Sign In Check In Check Out Can/Resch Change Edit Notes Appt Info Copy Fwd Expand Recur

2. Select Patient Flags from the patient options menu:

- Demographics
- Preferences
- Patient Flags**
- PCP/Care Teams
- Wait List
- Chart Request
- Registration
- Benefits
- Referrals
- Print Labels
- Dismiss Patient

The patient type is on the right hand side of the screen.

Zzyork, Samantha
 Preferred Name: None
 MRN: E1877300
 Female, 41 year old, 06/01/1970

PCP: None
 Primary Location: CASCADE EAST FAMILY ...
 Language: English
 Need Interp: No
 PT Type: Confidential
 HIPAA: NO

Patient FYIs: None
 MyChart: Inactive

1414 SW 24th AVENUE, PORTLAND OR 97204
 Home: 999-999-9999
 Work: None
 Cell: None

Patient Flags

Patient Settings

Patient status: Alive [1] Patient types: 1 Confidential [2]
 2

☐ Restricted record ☐ Block reminder ☐ Chart abstracted

Appointment Notification

Case supervisor:
 Case supervisor program:

Notification Class	Notification Person	Sched	Can/Res	Change	Missed
1					

- From Patient Options select Preferences.
- On this screen we can manage the Cadence communication with the patient.

Patient Preferences

Scheduling Preferences

Locations: 1
Days of the week: 1
Provider's sex:
Provider's language:
Time of day: 1
Begin Time:
End Time:

Provider Assignments

Prov/Sub	Provider	Subgroup	Department	Restrict	Relationship
1					

Appointment Notifications

E-mail:
Notify patient?
How?
Notification Points:
☐ Scheduled appointments ☐ Canceled appointments ☐ Changed appointments ☐ Missed appointments

Updates and Quick Reminder Preferences

Types:
Delivery type:
Quick reminder offset:
Mobile number:

Other Communication

Recalls and follow-up: ☒ Do not contact ☐ Mail ☐ Phone ☐ E-mail ☐ MyChart

- In the Appointment Notification section, select No and no reminders or updates will be sent for appointments. This area is specific for e-mail communication.
- In the Other Communication section, select Do not contact and no information will be sent. You can also select to have the patient receive information by phone or mail.
- Confidentiality with Phone Contact. If a patient chooses not to be contacted by phone, the phone field should be a 9 fill (999-999-9999).
- This is an indicator that the client should not receive reminder calls. Patients with these phone numbers are not called by Televox with appointment reminders. This will also display on the Confirm Appointments Report, which is used by the clinic personnel when making appointment reminder calls.

Confirm Appointments: Temporary report setting

☒ Include appts currently in unavailable time ☐ Include removed appointments

Phone	Patient	Age	Type	Appt Notes	Time	Prov/Res	Copay	Patient Type	AP
Hm: 999-999-9999	Zzyork,Samantha	41 yrs	OV [1]	Confidentiality	8:15 am	CANBY, PAUL [8480059]	\$0.00	Confidential	
Hm: 999-999-9999	Zzz.,Testapril Jr.	55 yrs	OV [1]	Confidentiality 2	8:45 am	CANBY, PAUL [8480059]	\$0.00	Non Confidential	

- It also displays on the Department Appointments Report, which is used by the Front Desk personnel.

Scheduling Reports

Department Appointments Report: Temporary report setting

Full Appointment List Appointment Totals

Date: 5/17/2012 Department: TRAINING DEPARTMENT 1[848001001]

Time	AP	Patient	Phone	Prov/Res	Status	Type	Interpreter Y/N	Language	Appt Notes
8:15 am		Zzyork,Samantha	Hm: 999-999-9999	CANBY, PAUL [8480059]	Sch	OV [1]	No [2]	English	Confidentiality
8:45 am		Zzz,Testapril Jr.	Hm: 999-999-9999	CANBY, PAUL [8480059]	Sch	OV [1]	No [2]	English	Confidentiality 2

IN CASE OF EMERGENCY

There are times when a clinic needs to contact a patient on an urgent medical matter. To ensure that there is some method of contacting the patient in those instances, there are a few options:

- On the Patient Demographics page in the Address section is Contact Information. This includes the various contact numbers available for the patient.

Zzyork,Samantha

PCP: None Primary Location: CASCADE EAST FAMILY ... Language: English Patient FYIs: None 1414 SW 24th AVENUE, PORTLAND OR 97204 Home: 999-999-9999

MRN: E1877300 Female, 41 year old, 06/01/1970 Pt Type: Confidential HIPAA: NO MyChart: Inactive Work: None Cell: None

Registration

PCP Audit Trail Claim Info Verify Info Verify Pt Patient FYI Family Lookup Fin Documents Cvg Eligibility Pull Info

Zzyork,Samantha

Demographics

Name: Samantha Zzyork SSN: 999-99-9999

Sex: Female Birth date: 6/1/1970 Aliases: 1

Permanent Address Temporary Address Confidential Address

Address: 1414 SW 24th AVENUE Contact Information: Number Type Number

City (or ZIP): PORTLAND State: OR ZIP: 97204 E-mail: 1 Home Phone 999-999-9999

County: MULTNOMAH Country: United States of America 2 Work Phone 3 Mobile

Comments:

When this workflow was developed cell phones were not as prevalent as they are today. The patient's cell phone may remove the need for a confidential contact types. Confidential work, confidential message are two options for contact types.

- Another option is to place the confidential phone number in the comments section.

Ochin Upgrade System - INITIAL DEPARTMENT

Home Schedule In Basket Chart Encounter Telephone Call Patient Lists Record Viewer Report Secure Appts View Sched

Zzyork,Samantha

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MRN: E1877300 Female, 41 year old, 06/01/1970 Pt Type: Confidential HIPAA: NO MyChart: Inactive Work: None Cell: None

Registration

PCP Audit Trail Claim Info Verify Info Verify Pt Patient FYI Family Lookup Fin Documents Cvg Eligibility Pull Info

Zzyork,Samantha

Demographics

Name: Samantha Zzyork SSN: 999-99-9999

Sex: Female Birth date: 6/1/1970 Aliases: 1

Permanent Address Temporary Address Confidential Address

Address: 1414 SW 24th AVENUE Contact Information: Number Type Number

City (or ZIP): PORTLAND State: OR ZIP: 97204 E-mail: 2 Work Phone 3 Mobile 4

County: MULTNOMAH Country: United States of America

Comments: Emergency Contact - Please call friend Tiffany and LM for Sam. 503-555-5555

Confidential phone contact information should be clearly marked as confidential, accessible in case of medical necessity, and not readily available to the user who does not need the information.

PATIENT CONFIDENTIALITY (ACCOUNTS)

A confidential account does not send a statement to a patient (if self-pay). Confidential account is found under Add'l Types on the Add Guarantor Account screen

Account/Coverage Wizard

Account Questionnaire
Coverage Questionn...

Add Guarantor Account Questionnaire

What is the service area for this guarantor account?

What type of account would you like to add to this patient?

☐ Personal/Family ☐ Workers' Comp ☒ Add'l Types

Who is responsible for this guarantor account?

☒ Self
☐ Employer
☐ Spouse
☐ Father
☐ Mother
☐ Other

Name:

Account/Coverage Wizard

Account Questionnaire
Coverage Questionn...

Add Guarantor Account Questionnaire

What is the service area for this guarantor account?

What type of account would you like to add to this patient?

☐ Personal/Family ☐ Workers' Comp ☒ Add'l Types

Who is responsible for this guarantor account?

☒ Self
☐ Employer
☐ Spouse
☐ Father
☐ Mother
☐ Other

Name:

Would you like to restrict your search with additional criteria? ☐ Yes ☒ No

Family planning Account type is another type of confidential account.

Account/Coverage Wizard

Account Questionnaire
Coverage Questionn...

Add Guarantor Account Questionnaire

What is the service area for this guarantor account?

What type of account would you like to add to this patient?

☐ Personal/Family ☐ Workers' Comp ☒ Add'l Types

Who is responsible for this guarantor account?

☒ Self
☐ Employer
☐ Spouse
☐ Father
☐ Mother
☐ Other

Name:

Income and family size are specific to this specific patient.

Account Federal Poverty Level Information								
	Eff Date	Annual Inco...	Family Size	% FPL	Staff Type	Proof of Income	Status	Reason
1	5/17/2012	1200	1	11		Verified [4]		

The limitation on statements is only for self pay. If coverage is attached to the visit, it will be treated as any other account type. Coverage will be billed and an Explanation of Benefits (EOB) may be sent to the patient.

Zzyork, Samantha
ID: 848000161
Birth Date: 6/1/1970
Sex: F
Language: English
Patient Type: Confidential
HIPAA: NO

Check In - OV on 5/17/12 at 8:15 AM with CANBY, PAUL in OFQHC RHC for 15 minutes

Appt Desk
031
Undo
ECP
Reg
Verify
Other Pmt
Referrals
Documents
LCD/ABN
MSPQ
Family Lookup
Family Registration
Fin Documents
Outside Records
Edit Cgpay
More

Check In

OFFICE VISIT SHORT
Demographics
Cobay
Options

Enc form number: 9331327
Visit claim info:
Cobay due: 0.00
Cobay type:
Cobay paid: 0.00
Payment source:
Reference:
Referral:
Referral source:
Reg status: New [3]
Date last verified:
Contract:
Visit POS: OREGON LOCATION [848001]

Account:

Acct ID	Account Name	Sta	Typ	FC	Balance	Contract	Expires	Claim
800036966	ZZZYORK, SAMANTHA			CONF	COMM	0.00		

Coverage:

Cvg ID	Payor	Plan	Subscriber
1554782	AETNA US HEALTHCARE	AETNA OHSU PPO, GROUP 476577-11-001	ZZZYORK, SAMANTHA

Cancel
Back
Next
Accept

If Front Desk is advised during or after the visit that the visit was confidential, a confidential account will be created and a staff message with subject "confidential visit" will be sent to the Billing Pool advising them to transfer visit to confidential account. Front Desk will use the dot phrase **.vgconfidentialbilling**.

.vgconfidentialbilling

Patient Name

MRN

Date of Service

PROCEDURE FOR BILLING:

Billing will transfer charges to a confidential account as advised.

PROCEDURE FOR BACK OFFICE:

- Medical Assistant or provider will list the first chief complaint as "Confidential."
- Provider will use the dot phrase **.vgconfidentialvisit** at the beginning of the chart note

.vgconfidentialvisit

This visit is confidential in whole or in part and cannot be released without review.

- Should the billing for this visit be confidential? If so, back office will notify front desk and document confidential portion of the visit in a separate encounter after front desk checks patient in under confidential account.
- Notify patient that the visit will not be confidential for the purposes of treatment (i.e., release to other covered entities)
- Depending on the payor, the back staff will follow the directives below:

	Medicaid		Commercial		Self-Pay/Medicare	
	Are ALL reasons for the visit appropriate for a confidential visit?					
	Yes	No	Yes	No	Yes	No
Encounter	1 encounter with cc: confidential	1 encounter with cc: confidential	1 encounter with cc: confidential	Open 2 encounters; 1 with cc: confidential	1 encounter with cc: confidential	Open 2 encounters; 1 cc: confidential
Charges/ Billing	Normal (no EOB issued)	Normal (no EOB issued)	Complete form to prevent EOB	Create a separate confidential account and check the pt back in for the confidential portion of the visit & Complete form to prevent EOB	Check pt in under confidential account	Create a separate confidential account and check the pt back in for the confidential portion of the visit

Confidential encounters with commercial insurance will fall into a work queue for review to be released when the ***Oregon Request for Confidential Communication*** form has been activated by the payor. Site management will delegate responsibility for the review of this queue.

PROCEDURE FOR MEDICAL RECORDS DEPARTMENT:

- If request is for release to another covered entity, proceed without filtering but ensuring that specially protected records have authorization.
- Medical Records will attempt to filter out confidential visits by:
 1. Chief complaint of “confidential”
 2. Confidentiality warning at the beginning of the chart note.

RELEVANT REFERENCES: OCHIN Patient and Account Confidentiality Workflow

RELATED DOCUMENTS/EXTERNAL LINKS: Request to Restrict Use and Disclosure or Confidential Communications form

OWNER: QI Committee

APPROVAL DATE: 4/1/2016

SUPERSEDES: 4/14/03; 12/12/08