Magellan Healthcare of Idaho

Outcomes and Assessments System – Consent form process

Overview

In Magellan's outcomes and assessments system (accessed via Availity Essentials), providers must locate the member and add them to their caseload to begin adding assessments. This may include obtaining consent from the member for Magellan to share with you the member's historical assessment data within the system. This guide shows how to complete a Consent Form that will grant access to historical information from assessments previously completed within the member's profile.

Table of Contents

Consent Form Process

When a provider needs access to historical assessment data in the member profile, the electronic Consent Form functions as the Authorization to Use and Disclose PHI (AUD) form to obtain the member's consent for Magellan to share their PHI with you. Please note that the Consent Form must undergo a review and approval process. Access will only be provided once the form has been fully reviewed and approved as valid. Prior to submitting a Consent Form, you must FIRST submit a Member Access with No Historical Data Form (MND). For step-by-step instructions, please view the Adding a Member to a Caseload with MND.

TIP: While you are on the phone scheduling an appointment, you can send the Consent Form to the member or natural support person, using the steps below, and give instructions on completing the Consent Form. Although a provider cannot pre-fill the form, a provider can assist the member over the phone to complete the Consent Form. Remember that all applicable sections will need to be

completed. If the consent form involves treatment for drug addiction or dependency, and the member is at least 16 years of age, then the member or their authorized representative must sign the consent form. If the consent form involves any other treatment involving a minor (under 18 years of age), then the legal parent, guardian, or authorized representative must sign the consent form. Any information involving an adult (18 years of age and older) must be signed by the adult member or their authorized representative. Please see the instructions on completing the member Authorization for Use and Disclosure of PHI/consent to release PHI on the Magellan Healthcare of Idaho website.

Adding contact information for member or natural support

1. Navigate to the member's profile.
2. Verify that there is a phone number and/or email address within the **Contact Info** section of the member's profile.
   NOTE: To send the Consent Form to the member/guardian, there must be an email address and/or a phone number on file for the member or the natural support. This is how the form will be sent to them if the member/guardian is not physically present.
3. Does the member or natural support have a phone number and/or an email address on file?
   - A. If yes, then proceed to the *Adding consent form* section.
   - B. If no, then proceed to *Step 4.*
4. Click **Edit Individual**.
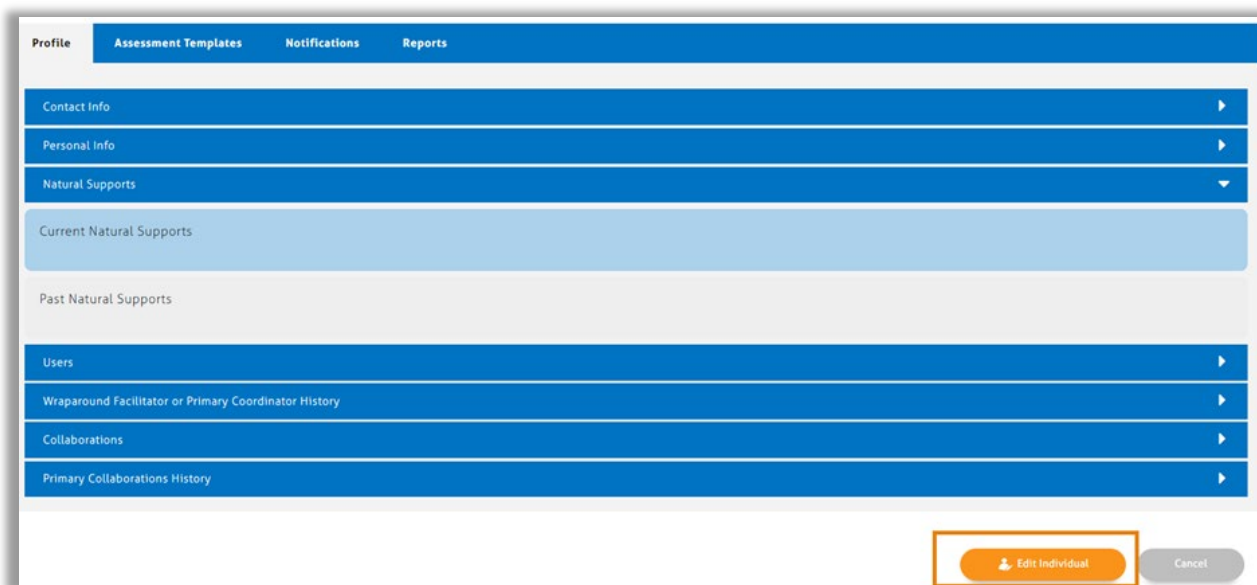
5. Expand the category **Natural Supports** and click **+ Add New**.

Magellan
HEALTHCARE®

6. Enter a phone number in the **Phone** field and/or enter an email address in the **Email** field for either the member or for the natural support.
   NOTE: When editing the member's profile, it is important that you do not edit anything other than phone number and/or email address. All other fields must remain untouched.

7. Be sure to check the appropriate box for **Texting Permitted** or **Email Permitted**, depending on which field (phone or email) you completed.

NOTE: You can add the member as a natural support if you need to send the Consent Form to their email address or phone number and they are not listed in their profile under **Contact Info**.

8. Click **Save**.
9. You can now proceed to the *Adding consent form* section.

Adding consent form

If you would like to access historical assessment data for your selected member, this indicates a Consent Form will need to be signed.

NOTE: After a Consent Form is submitted by the member/guardian, Magellan Compliance staff need two to three business days to review and approve the Consent Form for you to have access to the member's profile with historical assessment data.

Magellan HEALTHCARE®

1. From the member's profile, click the **Assessment Templates** tab.
2. Click the radio button to open the **Consent Form (Obtain historical data before performing assessment)** assessment.
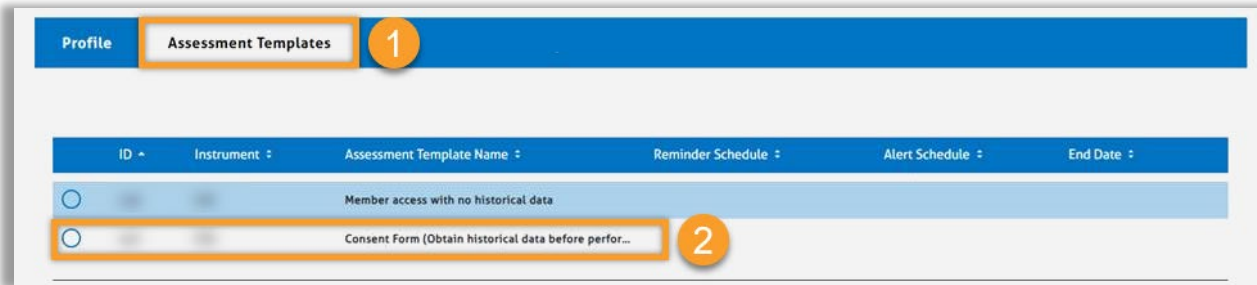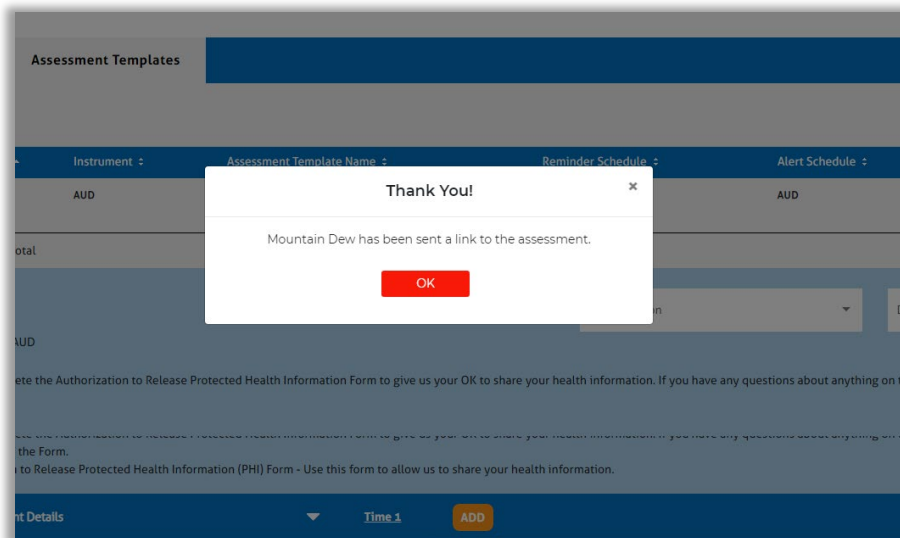

3. Click the **ADD** button.
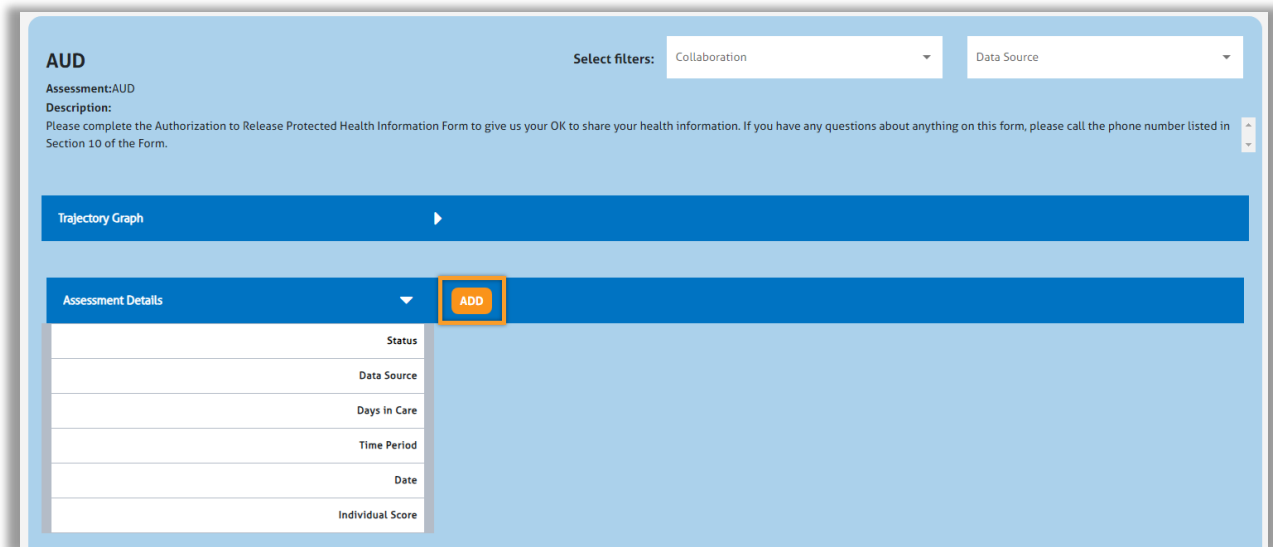
4. Complete the fields of the Add New Assessment screen.
   A. **Date** – Auto populates the **current date** and can be changed if needed.
   B. **Data Source** – Select the appropriate option for the Consent Form and whose email address or phone number has been added to the profile. In this case, it should be either the member's name or the Natural Support's name (i.e. parent/guardian), depending on who will be completing the assessment and who is marked for email or phone contact in the member's profile.
   NOTE: If the guardian is completing the Consent Form, legal documentation also needs to be submitted. For that step-by-step process, please reference the Uploading a Generic Document Step-by-Step Guide.
   C. **Reason** – Select **Initial**.
   D. **Notes** – Optional and can be used to provide additional information as needed.
5. Click the **Invite to Complete** button. This will send a link to the member's or their natural support (support person/family member/guardian) person's email or phone number indicated in the member's profile.

NOTE: If the permission to email and/or text box(es) have not been selected in the member's profile, the **Invite to Complete** button will be light blue and cannot be clicked. You must go back to the profile to edit and select the applicable permission. Be sure to ask the member or natural support whether they prefer to be contact via email or mobile phone.
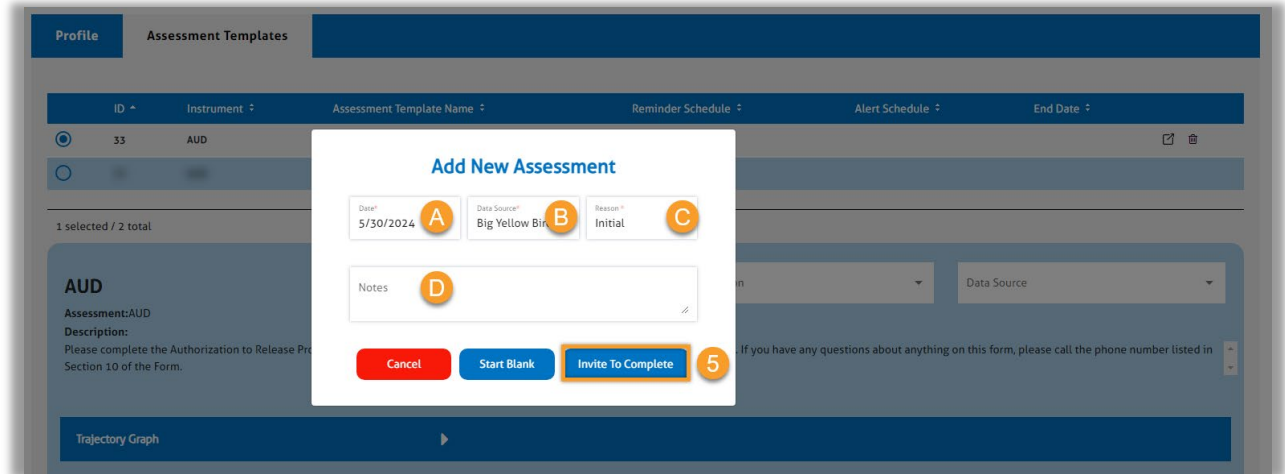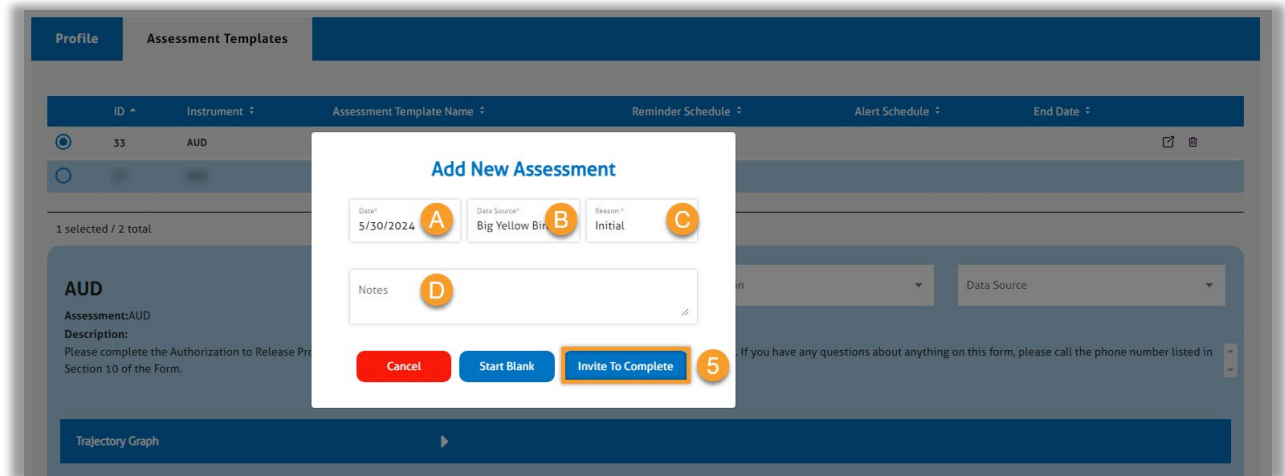

6. A **Thank You!** window will appear indicating that the natural support has been sent a link to complete the consent assessment. Click **OK**.
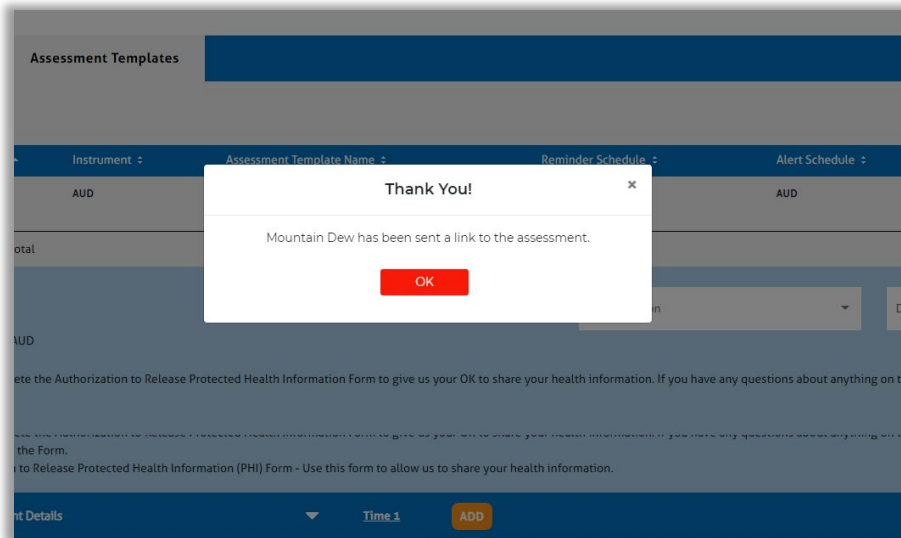

7. Click the **Invite to Complete** button. This will send a link to the member's or their natural support (support person/family member/guardian) person's email or phone number indicated in the member's profile.
   **NOTE:** If the permission to email and/or text box(es) have not been selected in the member's profile, the **Invite to Complete** button will be light blue and cannot be clicked. You must go back to the profile to edit and select the applicable permission. Be sure to ask the member or natural support whether they prefer to be contact via email or mobile phone.

Magellan HEALTHCARE®

8. A **Thank You!** window will appear indicating that the natural support has been sent a link to complete the consent assessment. Click **OK**.

9. An email from *info@pcis.com* will arrive with the Subject of "New Assessment Request." Within the email will be a **Start Assessment** link. This will take the member or natural support person to the outcomes and assessments system to complete the Consent Form.
   NOTE: This link is only good for 72 hours. If the link expires, the user can send an Invitation to Complete a Consent Form again to generate a new link.
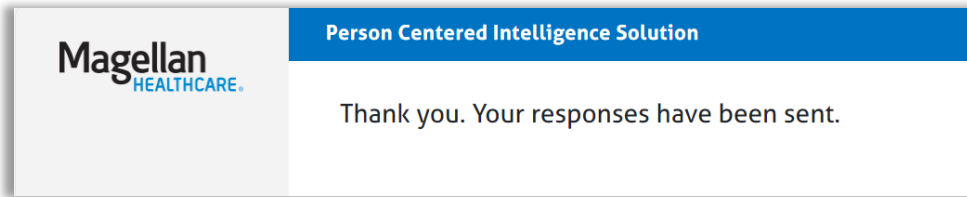
Magellan
HEALTHCARE®
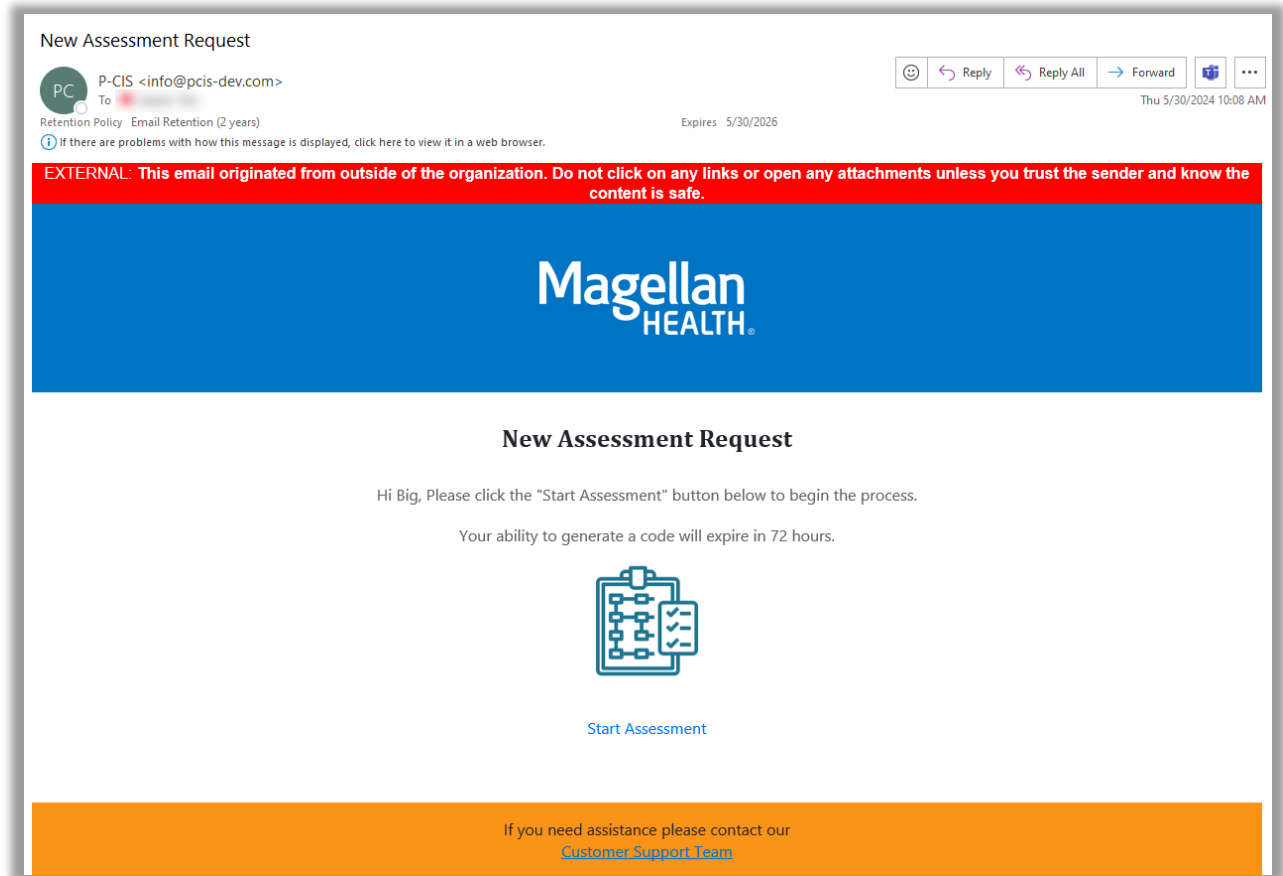
10. The link will take the member or natural support person to a verification screen for two-factor identification.
11. A verification code will automatically be sent to the member's or natural support person's email address or phone number.
12. Copy and paste the verification code into the **Verification Code** field.
NOTE: This code is only valid for 5 minutes. If the code has expired, request a new code by selecting **Resend**.
13. Click **Start Assessment**.
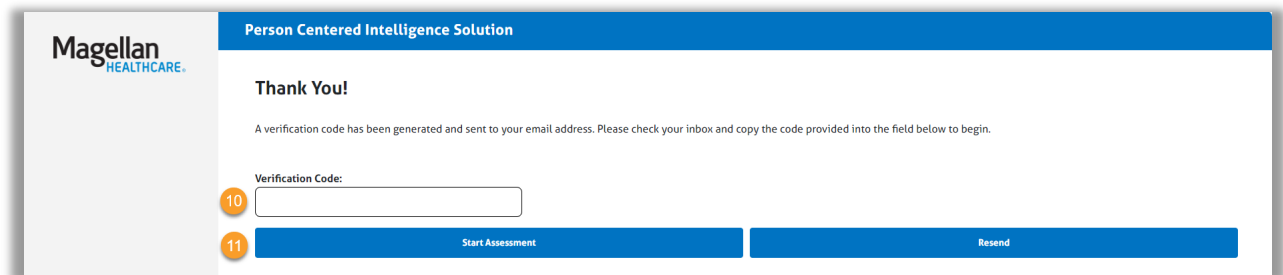
14. Following verification, the member or natural support person will complete the Consent Form in the system and will sign, date, and submit. The signature may be captured via a touch screen, tablet, touch pad, or mouse. The form does *not* need to also be mailed, faxed, or emailed once signed and submitted.

15. When the Consent Form is successfully submitted, the member or natural support person will receive a *"Thank you. Your responses have been sent"* message.

16. As a User in the outcomes and assessments system, you can see when the Consent Form has been successfully submitted. It will display a status of **Submitted**. Magellan Compliance staff still need two to three business days to review and approve the Consent Form for you to have access to the member's profile with historical data.
**NOTE:** Again, if the guardian completed the Consent Form, legal documentation is required to be submitted. For that step-by-step process, please reference the Uploading a Generic Document Step-by-Step Guide.

| Assessment Details	▼	Time 1	Time 2
Status		Email Sent	Submitted
Data Source		Big Yello…	Big Yello…
Days in Care		0	0
Time Period		Month 1	Month 1
Date		05/30/2024	05/30/2024
Individual Score		0.00	0.00

17. If the Consent Form is approved, the status will change to **Approved** and you will have access to the member's historical assessment data for the duration of the consent. You will be able to see the consent in the member's assessment templates tab as well as in reports, as well as be able to complete other assessments for the member as needed.

Assessment Details	▼	Time 1	Time 2
Status		Email Sent	Approved
Data Source		Big Yello…	Big Yello…
Days in Care		0	0
Time Period		Month 1	Month 1
Date		05/30/2024	05/30/2024
Individual Score		0.00	0.00

Magellan HEALTHCARE.

18. Consent can be revoked by the member in writing, at which point your historical assessment data access will be end-dated in the outcomes and assessments system.

19. If the Consent Form is deficient, the status will change to "**Returned**" and you will have a Notification, indicated by a number over the bell icon. After clicking the bell icon, your screen will display your Current Active Notifications and Past Notifications.
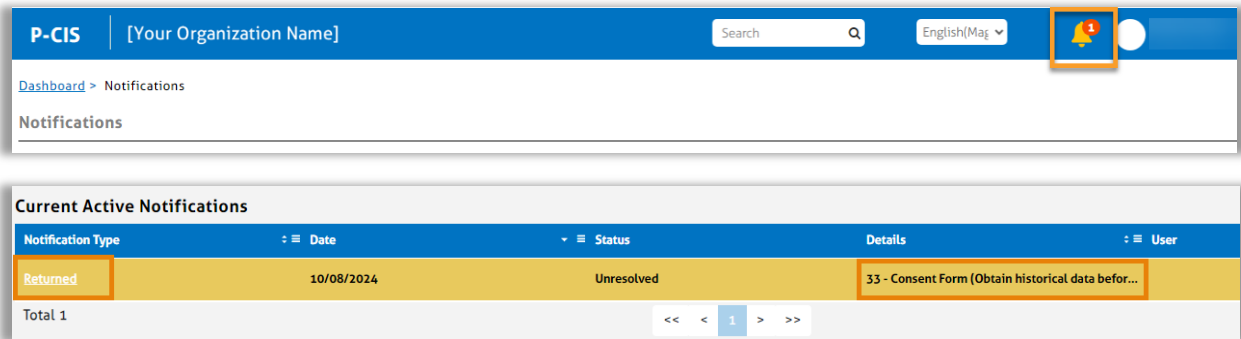
20. Within the Notes Section of the "**Returned**" Consent Form (you can open this by selecting the arrow drop down), the User will be alerted as to why the Consent Form was marked deficient and instructions to view the deficiency letter within the Generic Attachment Form (GAF) assessment.
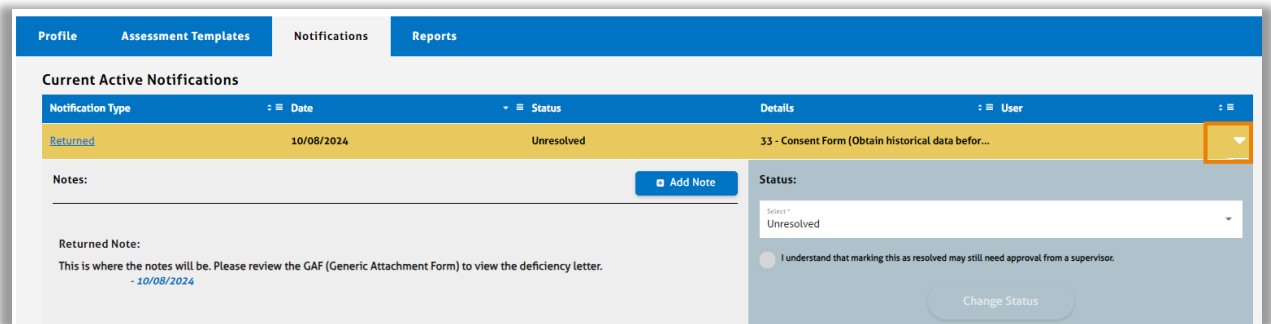
21. To view the Generic Attachment Form (GAF) assessment, click Assessment Templates tab. Click through the list of assessments to find Generic Attachment Form (GAF) and click the radio button. Historical data will not be shared with the User until a Consent Form is approved by the Magellan Compliance Team.