Patient Privacy Module for OpenEMR by MI-Squared

Introduction

The Patient Privacy module controls which patient records are accessible to which staff users. Any user of any ACL role, whether provider or non- clinician, may be 'attached' to a patient so they may view and edit their record. Users who are not attached to a patient may not.

In this document the 'Patient Finder' function is used to show a user's access permissions. In actual use, any display in which patient's PII appears would be regulated by this module. For example, if the logged in user was not attached to a patient that patient's appointment would be visible to the user on the calendar but their record could not be opened.

If used, this module will affect the entire patient roster. If setting these privacy access permissions is not part of the facility set up, some Administrator- ACL user will need to go through the entire patient roster and assign ('attach') a provider to each patient.

One handy thing: if the Patient Privacy module is ever disabled, it may be re-enabled again, and all the previous user attachment settings will return as they were at last use.

NOTE: at the time of this writing the Patient Privacy module is not included in the released versions of OpenEMR. Please contact us at <u>helpdesk@mi-squared</u> to discuss installing it on your OpenEMR instance.

Activate the Module

Once installed into your OpenEMR an Administrator- privileged user needs to register the module with the system to activate it.

Register Module

- 1. On the main menu, click 'Modules/ Manage Modules' (cursor arrow below)
- the module name will be somewhere in the list.

Calendar Flow Board Rec	ill Board Messages Patient/Client Groups Fe	es Modules Inventory Procedures Administ Manage Modules	ration Reports Miscellaneous Popu	s About Admin Administrator
Calendar 🖉 🔒 🗙 Message Cer	ter 2 읍 × Manage Modules 2 읍 ×			
	Registered Unregistered (2) Unregistered Modules			
	ID Nodule Name OpenENR Patient Privacy Module A Annual Science Privacy Module	Type Normal	Register	

- 2. Click the 'Register' button at the rightthe 'registered' tab will open with the module on it (below).
- 3. Click 'Install' button at right (cursor arrow)

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12								
Re	gistered Unregistered (8)							
	egistered Modules							-
ID	-	Status	Menu Text	Nick Name	Туре	Dependency Modules	Action	Config
ID	Module	Status	Menu Text	Nick Name	Туре	Dependency Modules	Action	Config

4. 'Install' button changes to 'Enable'; click it.

Nick Name	Туре	Dependency Modules	Action	Config
		Dependency modules		2
Pt Privacy Module	Custom		Enable	0

• The button changes to 'Disable', which indicates the module is enabled.

Nick Name	Туре	Dependency Modules	Action	Config
Pt Privacy Module	Custom		Disable	<u></u>

5. Log out and back in (not pictured)

The module is registered.

Attach Users

The Patient Privacy module has four different approaches by which to attach a user to a patient:

- 1. From the patient list
- 2. From provider pick list
- 3. From the user/ staff roster
- 4. From the list of ACL roles

And the user may be attached in one of two relationships:

- 1. Direct access
- 2. As supervisor to the attached user

These will be illustrated below.

On the main menu click 'Administration' then the new menu item, 'Patient Privacy'

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	Patient Privacy	'N		
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≙ ×	Clinic	•		
	Patients	•		
	Practice	•		
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Status Menu Text Nick Na	Forms	-	lodules A	Action
Active Oe-patient-privacy	Documents	•		Disable
	System	•		
	Users			

From Patient List

The 'Patients' tab is active by default.

1. Select a patient

Patient Privacy S	Settings			
Patients Users Roles				
Iter by Provider Any	+ Attach Patient			
Show 10 \$ entries			Search:	
Show 10 ¢ entries	ំរំ First Name	†4j DOB	Search:	τĻ
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Last Name	This hand	000	^{↑↓} PID	TĮ
Hornsby	Harney	1980-01-17	14 PID 9	Tå

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- The Provider Access panel appears showing default tab: Direct Access
- 2. Select user(s) to attach to this patient
 - You may 'Ctrl+ click' to attach multiple users
- Provider Access for Hornsby, Harney
 ×

 Direct Access
 Access via Supervisor

 Providers
 *

 Administrator, Admin
 Apgar, Virginia

 Applegate, Timothy
 borrego, I

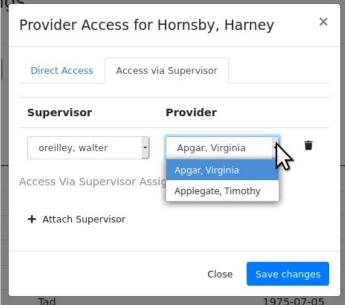
 Boyce, Elizabeth
 dogsbody, norman

 Magarinos, Michael
 oreilley, walter

3. Click 'Save Changes'

The Provider dropdown list will contain all the users that were attached in the previous step.

The Supervisor dropdown list has **the complete list** of users.



Be VERY careful when setting supervisors and attaching users to patients. See final 'Caution!' section of this document for details

Note in this example below that Provider Virginia Apgar has two different supervisors

- This shows that Dr Apgar has 'Direct Access' to Hornsby's record as Provider.
- However, oreilley is Apgar's supervisor over this patient, so he can see Hornsby, in addition to any patients oreilley may be attached to himself.
- And norman dogsbody is also Apgar's supervisor in regards to Hornsby's treatment, so HE can see Hornsby, too, along with his own.

Provider Access fo	r Hornsby, Harney ×
Direct Access Access	s via Supervisor
Supervisor	Provider
oreilley, walter	Apgar, Virginia 🝵
dogsbody, norman	Apgar, Virginia 🍵
Access Via Supervisor A	ssignment
+ Attach Supervisor	
	Close Save changes

AND SO-- when Dr Apgar logs in, Hornsby is the only pt she can see.

oard Messages Pa	ient/Client Groups	Fees Inventory P	rocedures Reports	Miscellaneous Popups	About	Vir	ginia Apga
중 음 × Patient Finder	7 0 m					Search by any (Q	Portal 🚺
atient Finder							
Show 10 ¢ entries				Search:			
Search by Name	Search by Home I	Search by SSN	Search by Date c	Search by Externa	Search by Posta		
Full Name *	Home Phone	SSN A	Date of Birth	External ID *	Postal Code		
	4434445555		01/17/1980	9	99887		

From Provider Pick List

A slightly quicker method to attach users to patients is to use the provider pick list found on the initial User Patient Permissions tab. This would be a handy way to attach a provider to all their patients in one sitting.

	dessage Center 🞜 🔒 🗴 User Patient Permissions 🕫 🔒 🗙	
1. Select a user from the list.	Patient Privacy Settings	
	Patients Users Roles	
	Filter by Provider Applegate, Timothy + Attach Patient	
	Any Show 10 ¢	
	Last Nar Administrator, Admin	
	Apgar, Virginia	
	Last Nar Applegate, Timothy First Name	
	borrego, I	
	Showing 1 to 1 Boyce, Elizabeth	
	dogsbody, norman	
	Magarinos, Michael	
	oreilley, walter	
	Colored Second	

• it will show the provider's current list of patients they're attached to (below).

* Note: this panel shows only the patients that have been added with this panel. If the user is attached to a patient via the 'User' or 'Roles' tabs that patient will not appear here.

Patient Privacy Se	ettings			
Patients Users Roles				
er by Provider Applegate. Timoti	ny 🔹 🕇 Attach Patient			
how 10 ¢ entries			Search:	
Last Name	14 First Name	TL DOB	The PID	t4 ₀
	No data av	allable in table		
Last Name	First Name	DOB	PID	

2. Click 'Attach Patient' (oval above)

3. Enter partial patient name and select when full name appears (yes, this is an unusual demo patient name...).

- 4. Click 'Save changes' to save changes.
 - Panel now displays the attached provider's list of patients (below)
- 5. Click 'Attach Patient' again to add another patient.

Attach Patient to Provider	×
Patient	
Full Name:	
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000 Repo @, 000 Image % (4 2020-05 06)	
дов:	
1980-01-17	
Sex:	
Male	
Attach to Provider	
Provider	
Applegate, Timothy	-
	_
Close Save chan	ges

	bellings			
Patient Privacy S Patients Users Roles	je stange			
Filter by Provider Applegate, Time	• + Attach Patient			
Show 10 ¢ entries			Search:	
Last Name	Tig First Name	†≟) DOB	^{†1} ₀ PID	1
	^{↑↓} First Name 000 Image %	14 DOB 2020-05-06	^{†1} 0 PID 4	Ť
Last Name	i iist italite	202	1 1.2	1

From the User tab

This tab lists all users (not only providers) in all the roles they are assigned in their OpemEMR user profile.

It allows attaching one user as supervisor to another user in each of their roles.

Patie	ent Privacy	y Settin	gs	
Patient	ts Users Ro	les		
Show 10	entries		Search:	
ID _† ,^	Last Name ↑∮	First Name ↑∲	Username 🏦	Role 🌐
1	Administrator	Admin	default-admin	Administrators
4	Apgar	Virginia	vapgar	Clinicians
4	Apgar	Virginia	vapgar	Physicians
5	oreilley	walter	radar	Clinicians
5	oreilley	walter	radar	Front Office
6	dogsbody	norman	ghost	Clinicians
7	Applegate	Timothy	timapple	Physicians
8	tuck	h	htuck	Clinicians
9	Boyce	Elizabeth	Elizabeth	Administrators
9	Boyce	Elizabeth	Elizabeth	Clinicians
ID	Last Name	First Name	Username	Role

Click on the user's name (here, Virginia Apgar, listed in the previous panel) then select the supervisor for them in that role.

> Bug alert - attaching a user as supervisor of another user in one role will attach them in all roles of the other user

Supervisor Relationships Virginia	for Apo	gar,	×
Supervisors			
, Administrator, Admin Applegate, Timothy borrego, I Boyce, Elizabeth dogsbody, norman Magarinos, Michael <u>oreilley, walter</u> Spisak, Jason			
	Close	Save change	es

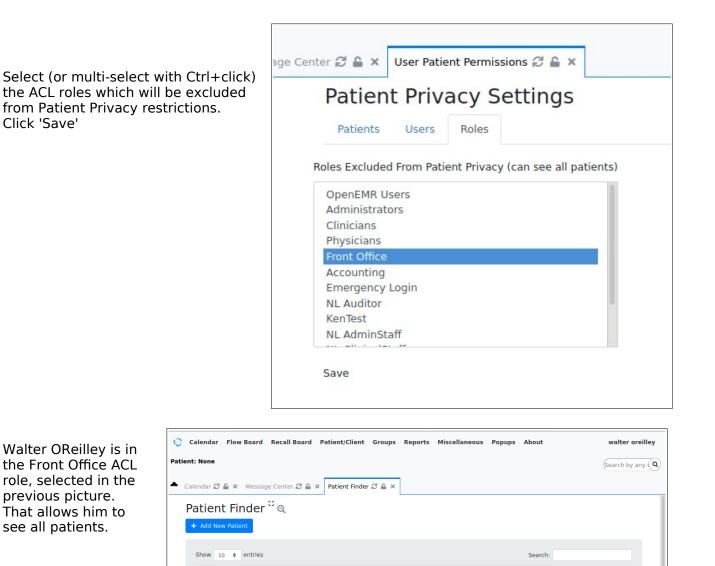
Note: A staff who is not allowed to view patient records can still select them for such tasks as do not expose PII. For e.g., they can create an appointment for a patient on the calendar. But if they try to open the patient's record, they get a 'Demographics not authorized' message.

	Calendar Flow Board Recall Board Messages Patient/Client Groups Fees Inventory	Procedures Reports Miscellan
	Patient: Testy Bestertester (1) × DOB: 11/04/1995 Age: 25	 Open Encounter: None View Past Encounters (10) -
ŀ	Calendar 🖉 🔒 🗙 Message Center 🤁 🖴 🗙 Patient Finder 🥰 🖨 🗙 Dashboard 🥰 🖨 🗙 Past Encour	nters and Documents 🖨 🔒 🗙
	(Demographics not authorized)	

From the Roles tab

The Roles tab allows an Administrator to exclude any one or many ACL roles from the module's access controls. Which therefore gives members of those roles full access to all patients' records.

Note: by default, the Administrator ACL role sees all patients no matter what Patient Privacy settings a patient has.



Open in New Window Search with exact method

Search by Name

000 Repo @, 000 Image %

Davidson, Harley

Hornsby, Harney

Huckster, Harald H

Le Pew, Pepe A

Patient, Newtest

Test-Patient, ExtID

Test-Patient,

External ID

Full Name

.

Bestertester, Testy 8324321215

Dockendorf, Tad A 307-855-3055

Search by Home P

Home Phone

555-3333

4434445555

.

SSN

Search by SSN

Search by Date (

Date of Birth

05/06/2020

11/04/1995

02/08/1995

07/05/1975

01/17/1980

01/06/1971

11/05/1985

12/04/1992

12/09/1988

12/06/2002

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4

1

11

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2

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AA123

aab-001-pnm1

Search by Externa

External ID

Search by Posta

Postal Code

92692

11111

14220

82001

99887

14220

82001

14220

User 'htuck' is a clinician who is not attached to any patients or assigned as a supervisor to any user. He can't see anything.

ar Flow	Board	Recall Board	Messages	Patient/Clien	t Groups	Fees	Inventory	Procedure	s Reports	Miscellan	eous Popups	About	
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2 🔒 ×	Message	Center 🖯 🔒	× Patient Fi	nder 🕄 🔒 🗙									
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	Full	Name	 Home I 	Phone 🔺	SSN	*	Date of	Birth 🔺	External II	D *	Postal Code		
					No d	ata avai	ilable in tat	ole					
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Deactivate the Module

The Patient Privacy module may be inactivated at any time without affecting any PII.

- 1. The EMR Administrator simply goes back to Manage Modules (Main menu: Modules/ Manage Modules) screen
- 2. Clicks the 'Disable' button

tatus	Menu Text	Nick Name	Туре	Dependency Modules	Action	Config
ctive	Oe-patient-privacy	Pt Privacy Module	Custom	-	Disable	Q

3. and it will be disabled.

4. Log out of the EMR and back in again to finalize the deactivation and remove the Patient Privacy main menu item.

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tory Procedures	Administration	Reports Misce
	Globals	
	Clinic	
	Patients	•
	Practice	

And... that poor user htuck who couldn't see any patients before, is back to full patient roster viewing capabilities.

Calendar	Flow Board Recall Boar	d Messages Patient/Client Groups Fe	es Inventory Proce	dures Reports Misc	ellaneous Popups	About h tuck
🔺 Calendar 🕫 🔒	🗙 Message Center 🖉 🕯	🛓 × Patient Finder 🖓 🚔 ×				
	Patient Finder	" Q				
	+ Add New Patient					
	Show 10 ¢ entries			Search:		
	Search by Nami	Search by Home P Search by SSN	Search by Date (Search by Extern	Search by Posta	
	Full Name *	Home Phone * SSN *	Date of Birth	External ID *	Postal Code	-
	000 Repo @. 000 Image %		05/06/2020	4	92692	
	Bestertester, Testy	8324321215	11/04/1995	1	11111	
	Davidson, Harley	555-3333	02/08/1995	11	14220	
	Dockendorf, Tad A	307-855-3055	07/05/1975	3	82001	
	Hornsby, Harney	4434445555	01/17/1980	9	99887	
	Huckster, Harald H		01/06/1971	8	14220	

Caution!

This module works purely with what it is given by the Administrator configuring the attachments. It has no logic checking so it is easy to set up conflicting access permissions.

- This module will allow having user1 as supervisor to user2 on one patient, then user2 as supervisor to user1 for another patient.
- It will allow accidentally setting a user as their own supervisor
- It will allow very complex relationships between attached users, which may defeat the intended access barriers.

Suggestion: diagram the user/ supervisor relationships before configuring them.