

## Consent2Share Admin User Guide



Consent2Share C/S
HOME ABOUT

Take control of your health and well-being with Consent2Share.

**No Account? Register Today!**

To register for Consent2Share, please contact your provider and ask about a Consent2Share Account.

Log in with your account

Username:

Password:

Login

[Forgot Password?](#)

Version: 0.19.0

**About Your Consent2Share account.**

Consent2Share is a secure online website that gives you convenient 24-hour access to your personal health record from anywhere using an Internet connection. It can help you to become more informed about your health care and thus to be more involved in your health care.

[Learn more about this topic.](#)

**How Can Consent2Share Help Me?**


Think of Consent2Share as a very helpful tool. It can help put you in charge of your own health information. It will help you quickly find your health information—from all of your health care providers—in one place! Not only can you view and print your health information, you can add information, communicate with your providers, manage your prescriptions, and many more

**Is My Information Private and Secure?**

Yes. Your Consent2Share account has many privacy and security safeguards designed to protect your health information. Even though your health information is online, it is private and only accessible by authorized people, such as your health care providers.

[Learn about this topic.](#)

# About Consent2Share



- A secure website that provides patients with 24-hour access to their personal health record
- Accessible anywhere using an internet connection
- Puts patients in charge of their own health information
- Allows patients to share your health records with providers
- Allows patients to choose what they wish to share
- Allows patients to provide electronic consent for their choices

# About This Admin User Guide

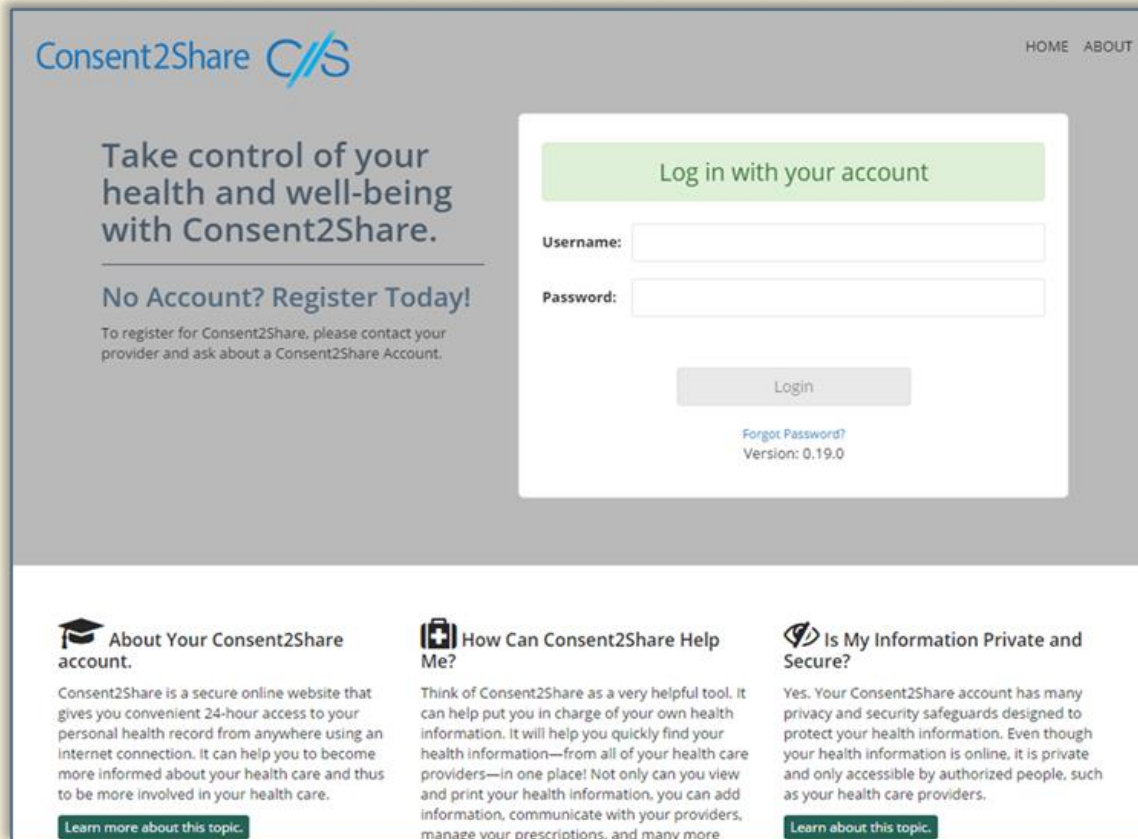


This Admin User Guide will show you how to:

- Create a patient account
- Collect patient demographics
- Update a patient account
- Send a verification email and a Verification Code so patients can activate their patient accounts
- Search for patients and retrieve their corresponding medical documents

# Section 1: Create a Patient Account

Login to the Consent2Share admin portal with your credentials



The screenshot shows the Consent2Share login page. At the top left is the logo "Consent2Share C/S". At the top right are links for "HOME" and "ABOUT". The main content area has a grey background. On the left, it says "Take control of your health and well-being with Consent2Share." followed by "No Account? Register Today!" and a note to contact a provider for registration. On the right, there is a white box titled "Log in with your account" containing a "Username:" field, a "Password:" field, a "Login" button, a "Forgot Password?" link, and the text "Version: 0.19.0". The footer has three columns: "About Your Consent2Share account." with a graduation cap icon, "How Can Consent2Share Help Me?" with a first aid icon, and "Is My Information Private and Secure?" with a lock icon. Each column has a paragraph of text and a "Learn more about this topic." link.

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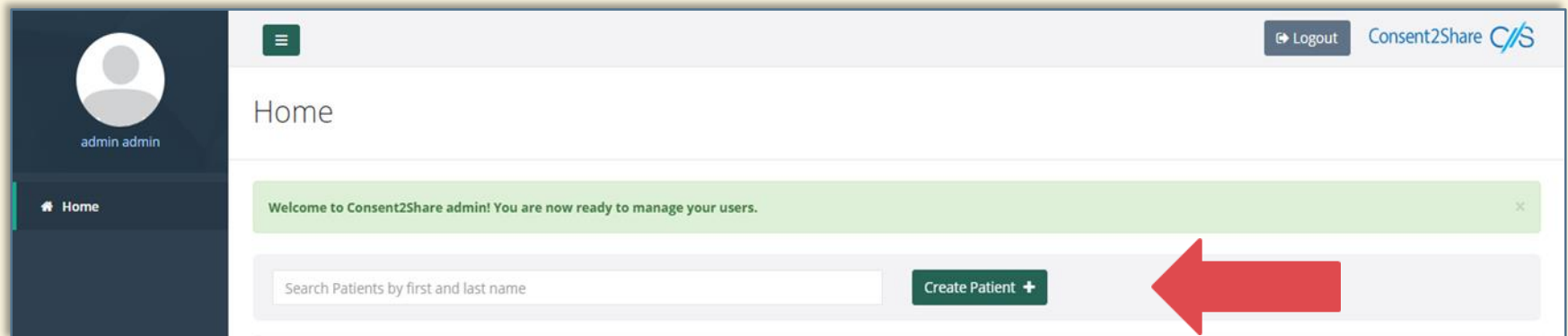
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[Learn about this topic.](#)

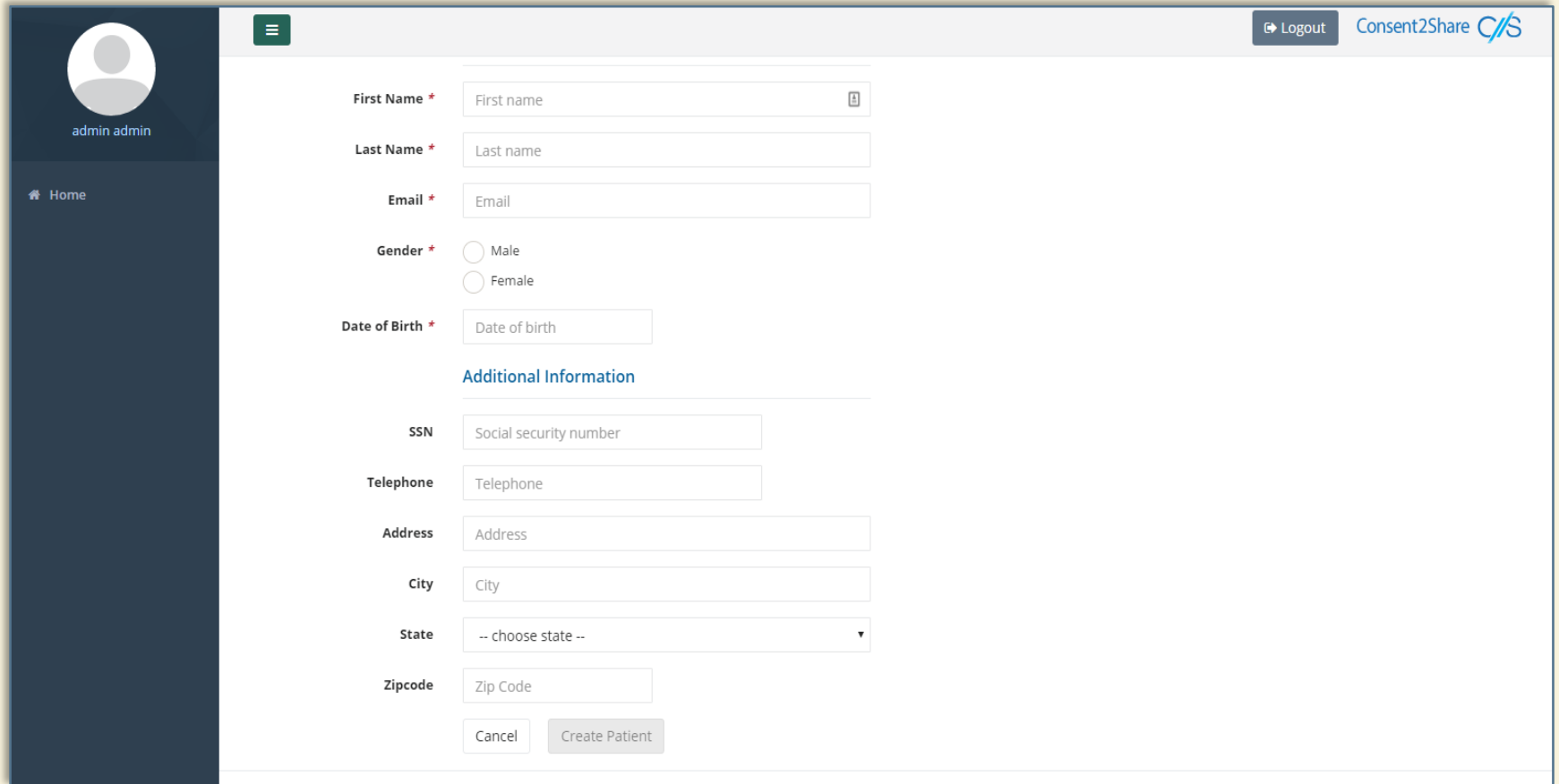
# Create a Patient Account

- Click the Create Patient + button on the Home Page



- This will bring you to the Patients Demographics Page shown on the following slide

# Patient Demographics Page



The screenshot shows a web application interface for entering patient demographics. On the left is a dark sidebar with a user profile icon and the text 'admin admin', and a 'Home' link. The top header contains a menu icon, a 'Logout' button, and the 'Consent2Share C/S' logo. The main content area contains a form with the following fields: 'First Name' (text input), 'Last Name' (text input), 'Email' (text input), 'Gender' (radio buttons for 'Male' and 'Female'), 'Date of Birth' (text input), and a section titled 'Additional Information' which includes 'SSN' (text input), 'Telephone' (text input), 'Address' (text input), 'City' (text input), 'State' (dropdown menu with '-- choose state --'), and 'Zipcode' (text input). At the bottom of the form are 'Cancel' and 'Create Patient' buttons.

**admin admin**

Home

Logout Consent2Share C/S

**First Name \***

**Last Name \***

**Email \***

**Gender \*** ☐ Male ☐ Female

**Date of Birth \***

**Additional Information**

**SSN**

**Telephone**

**Address**

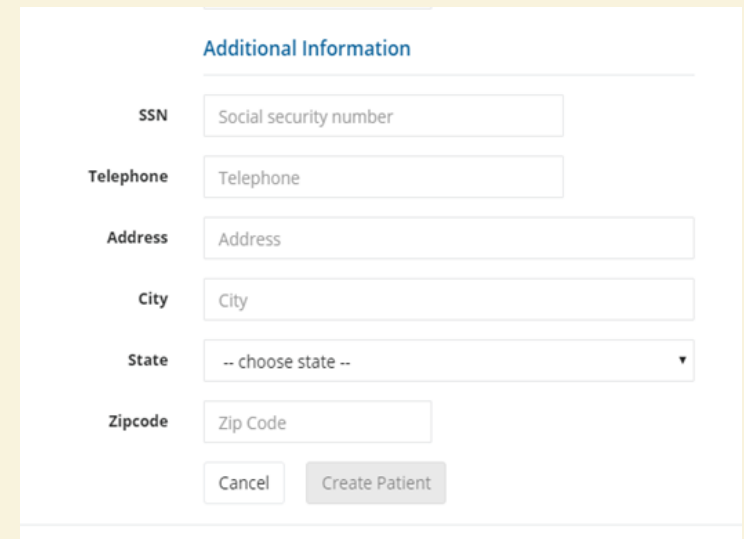
**City**

**State**

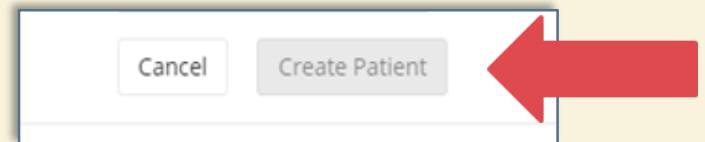
**Zipcode**

# Section 2: Collect Patient Demographics

- Enter information for the required fields (first name, last name, email, gender, and date of birth)
- Either enter the details in the Additional Information section now or leave it for later
- When finished entering information, click Create Patient



A screenshot of a web form titled "Additional Information". The form contains several input fields: "SSN" with a placeholder "Social security number", "Telephone" with a placeholder "Telephone", "Address" with a placeholder "Address", "City" with a placeholder "City", "State" with a dropdown menu showing "-- choose state --", and "Zipcode" with a placeholder "Zip Code". At the bottom of the form are two buttons: "Cancel" and "Create Patient".



# Section 3: Update Patient Information



- You can return to a patient's Profile Page and enter information that was not previously entered
- You can return to a patients Profile Page and modify information that changed since the account was created
- You will see that the Create Patient button on the Patient Profile Page is replaced by an Update Patient button
- This button becomes active when information is edited or when new information is added to the patient profile page



# Update Patient Information

The screenshot shows a web application interface for updating patient information. On the left is a dark sidebar with a user profile icon labeled 'admin admin' and a 'Home' link. The top right of the page has a 'Logout' button and the 'Consent2Share C/S' logo. The main content area contains a form with the following fields:

- First Name \***: Text input with 'Alan' and a clear button.
- Last Name \***: Text input with 'Rickman'.
- Email \***: Text input with 'skannusami@gmail.com'.
- Gender \***: Radio buttons for 'Male' (selected) and 'Female'.
- Date of Birth \***: Text input with '01/31/1990'.
- Additional Information**: A section header followed by several text inputs:
  - SSN**: 'Social security number'
  - Telephone**: 'Telephone'
  - Address**: 'Address'
  - City**: 'City'
  - State**: A dropdown menu showing '-- choose state --'.
  - Zipcode**: 'Zip Code'

At the bottom of the form are two buttons: 'Cancel' and 'Update Patient'. A large red arrow points to the 'Update Patient' button.

# Section 4: Verifying Patient Account

## Step 1

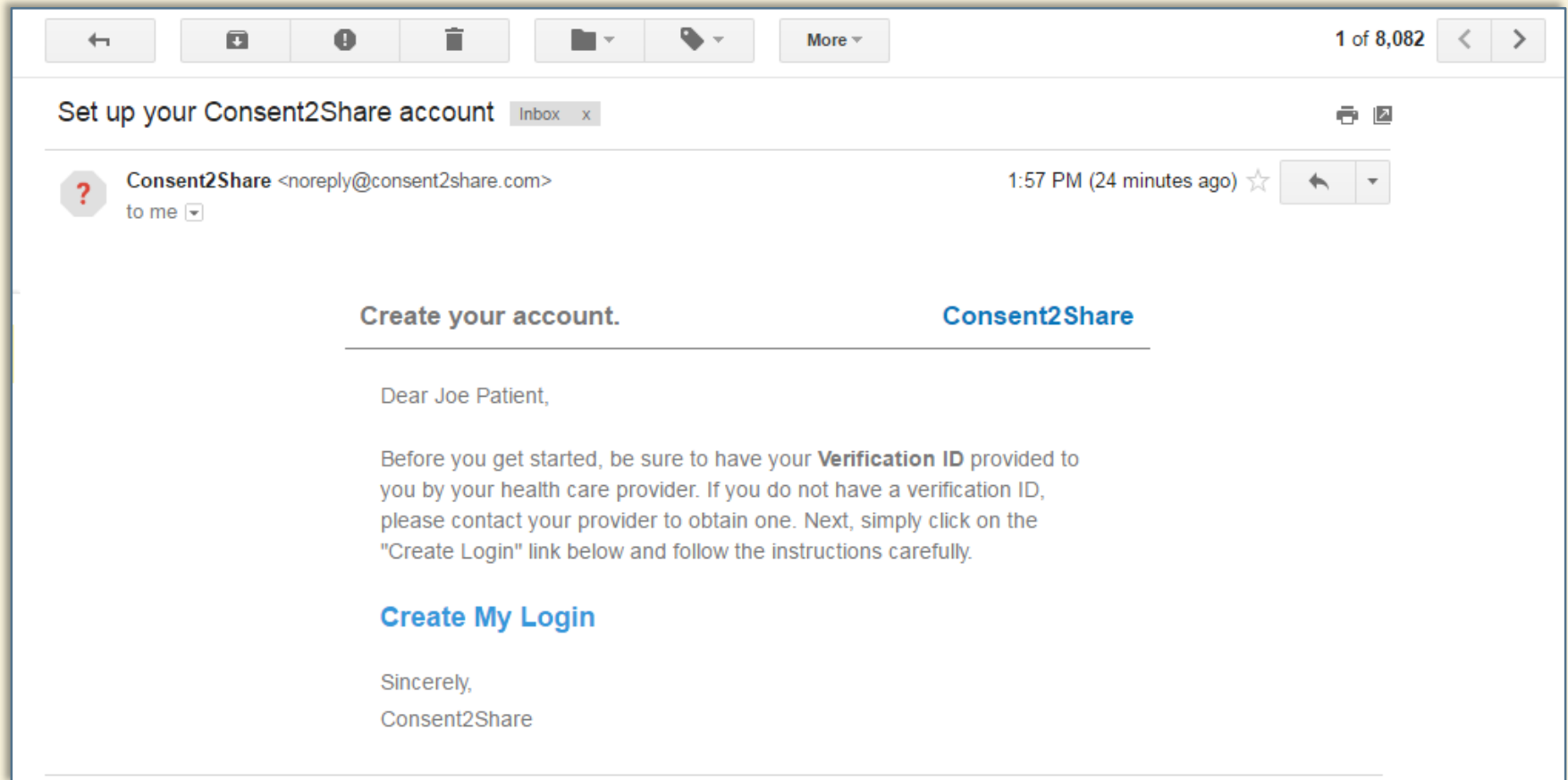
- Once the patient account is created, send an activation email to the patient's email address  
The email will contain a link to Consent2Share for the patient to complete the registration (See sample on next page)

## Step 2

- When you click the Send Email button, an alphanumeric Validation Code is generated. Email the code to the patient in a separate email (See sample below)
- Once done, patients can create their login

Verification Code:  
j43a6s0

# Activation Email



# Verify Patient Account

The screenshot shows a web application interface for verifying a patient account. On the left is a dark blue sidebar with a user profile icon labeled 'admin admin' and a 'Home' link. The main content area has a light blue header with a 'Logout' button and the 'Consent2Share C/S' logo. A green notification box at the top center says 'email sent successfully'. Below this, the 'Patient ID' is displayed as 'C2S-QA.M6C6SN^^&1.3.6.1.4.1.21367.13.20.205'. The main section is titled 'Account Activation / Verification Code'. It shows the email 'skannusami@gmail.com' and the verification code 'siq00qk'. A message states: 'Please Send Email to generate the Verification Code. Sending an account activation email to the address listed above will generate a unique Verification Code. That Verification Code will be displayed above.' Below this, the 'Account Status' is 'Activation Email Sent.' with a 'Resend Email' button. A yellow note says: 'Please Note. All fields with \* are required to create a User Account. Additional Information may also be added as provided.' The 'Required Information' section contains form fields for 'First Name' (Alan), 'Last Name' (Rickman), 'Email' (skannusami@gmail.com), 'Gender' (Male selected), and 'Date of Birth' (01/31/1990).

admin admin

Home

Logout Consent2Share C/S

email sent successfully

Patient ID: C2S-QA.M6C6SN^^&1.3.6.1.4.1.21367.13.20.205

### Account Activation / Verification Code

Activate Account for: skannusami@gmail.com

Verification Code: siq00qk

Please Send Email to generate the Verification Code. Sending an account activation email to the address listed above will generate a unique Verification Code. That Verification Code will be displayed above.

Account Status: Activation Email Sent. Resend Email

Please Note. All fields with \* are required to create a User Account. Additional Information may also be added as provided.

#### Required Information

First Name \* Alan

Last Name \* Rickman

Email \* skannusami@gmail.com

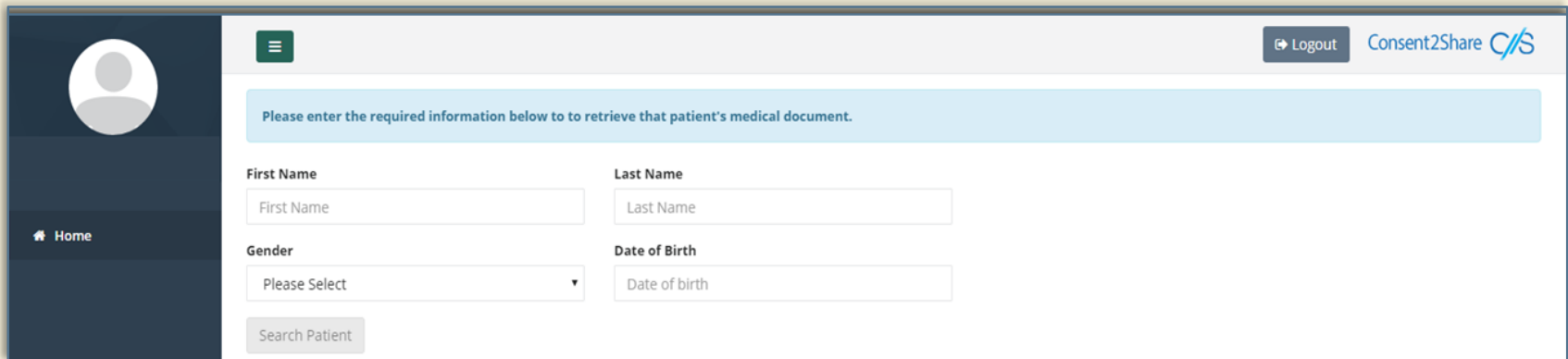
Gender \* ☒ Male ☐ Female

Date of Birth \* 01/31/1990

- After you send the verification email to the patient you will see an “email sent successfully” pop-up window at top

# Section 5: Search for Patients


- Consent2Share includes a patient search feature
- Log into the admin portal using your provider credentials



The screenshot shows the Consent2Share admin portal interface. On the left is a dark sidebar with a user profile icon and a 'Home' link. The main content area has a light blue header with a 'Logout' button and the 'Consent2Share C/S' logo. Below the header is a light blue instruction bar: 'Please enter the required information below to retrieve that patient's medical document.' The search form contains four fields: 'First Name' (text input), 'Last Name' (text input), 'Gender' (dropdown menu with 'Please Select' as the current selection), and 'Date of Birth' (text input). A 'Search Patient' button is located at the bottom left of the form area.

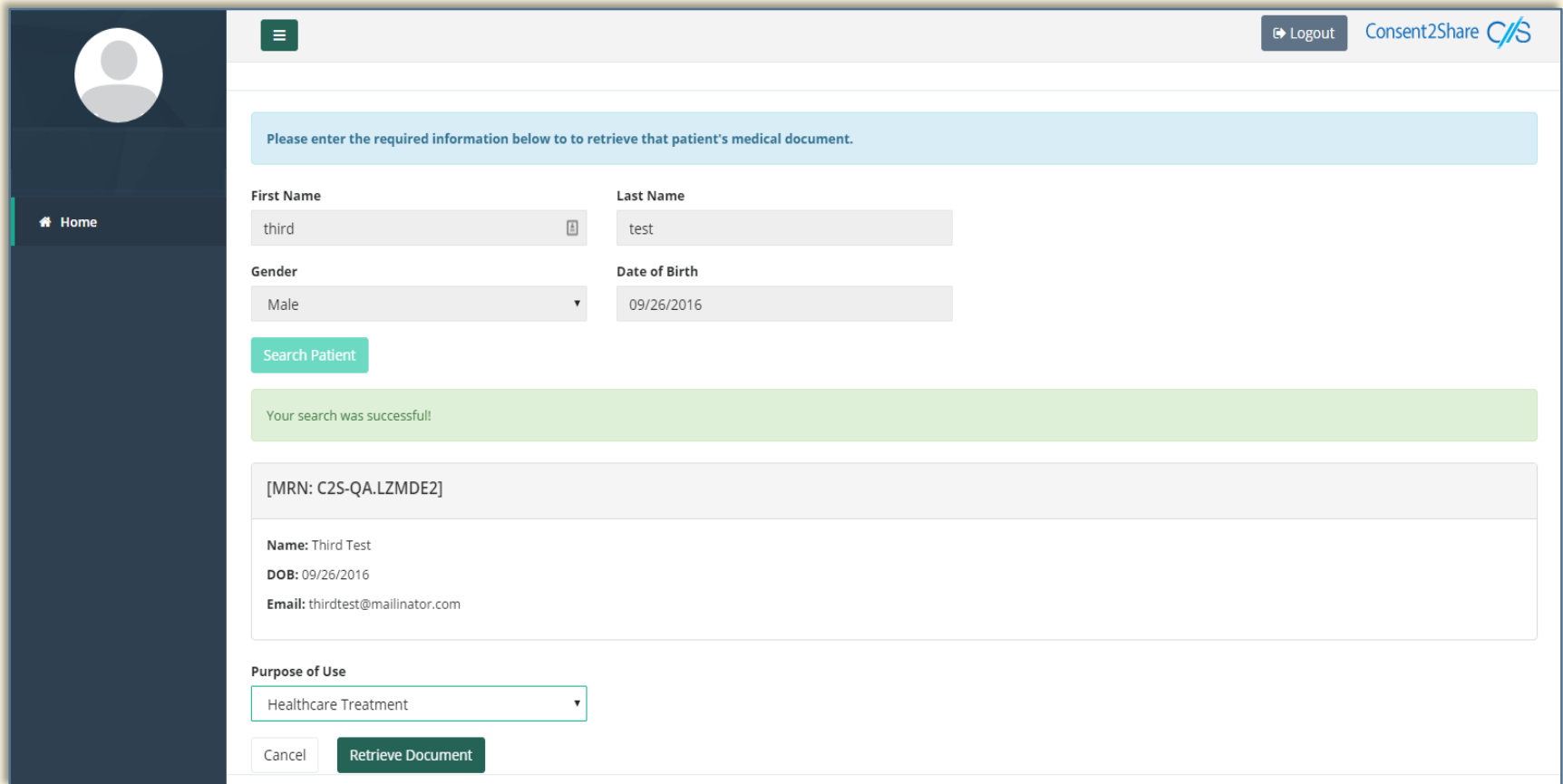
- You need first name, last name, gender, and date of birth to complete the search
- Click Search Patient and you will be brought to the patient's Profile Page

# Retrieving Patient Documents



- Once you successfully searched for a patient, you will be able to locate his or her medical documents under the following two conditions:
  - ✓ There is an existing valid consent from the patient to you to view the document
  - ✓ You should select the correct option from the Purpose of Use drop down on the page
- When they are satisfied, you can click the Retrieve Document button to view the document

# Retrieving Patient Documents Page



The screenshot shows a web application interface for retrieving patient documents. It features a dark blue sidebar with a user profile icon and a 'Home' link. The main content area has a light blue header with a menu icon, a 'Logout' button, and the 'Consent2Share C/S' logo. A light blue instruction box asks the user to enter required information. Below this, there are input fields for 'First Name' (containing 'third') and 'Last Name' (containing 'test'). There are also dropdown menus for 'Gender' (set to 'Male') and 'Date of Birth' (set to '09/26/2016'). A green 'Search Patient' button is positioned below these fields. A green success message states 'Your search was successful!'. Below this, a grey box displays the MRN: C2S-QA.LZMDE2. A white box contains patient details: Name: Third Test, DOB: 09/26/2016, and Email: thirdtest@mailinator.com. At the bottom, there is a 'Purpose of Use' dropdown menu set to 'Healthcare Treatment', and two buttons: 'Cancel' and 'Retrieve Document'.

Please enter the required information below to retrieve that patient's medical document.

**First Name**  
third

**Last Name**  
test

**Gender**  
Male

**Date of Birth**  
09/26/2016

Search Patient

Your search was successful!

[MRN: C2S-QA.LZMDE2]

**Name:** Third Test  
**DOB:** 09/26/2016  
**Email:** thirdtest@mailinator.com

**Purpose of Use**  
Healthcare Treatment

Cancel Retrieve Document