

# Patient Consent Withdrawn - Opt Out

Since March 2020 CAT4 supports the opt out mechanism provided in Medical Director Clinical and Best Practice.

In Medical Director the opt out is found on the patient details screen as shown below:

Patient Details

Pt. DetailsAllergies/Adverse Reactions/WarningsFamily/Social HxNotesSmokingAlcoholPersonal Details

Title:MrsSingle NameHead of Family

First Name:Penny

Middle Name:

Surname:Anderson

Known as:Penny

Date of Birth:04/07/1940Gender:FemaleTransgender

ATSI:Neither Aboriginal nor Torres Strait IslanderRegistered for CTG Co-Payment relief

Ethnicity:

Mrs Penny Anderson (79yrs 8mths)

Set

Medicare No:0

Medicare Expiry:

Pension No:

DVA No:

Safety Net No:

Record No:345677

IHI No:Validate

IHI Record Status:IHI History

IHI No Status:

Pension Status

None

Pension/HCC

Full DVA

Limited DVA

Contact Details

ResidentialPostalPreferred Mailing AddressResidentialPostal

Address:61 Wallace St

City/Suburb:MelbournePostcode:3000

Default phone number to be displayed

HomeWorkMobile

Phone:123123

E-mail:

Preferred Contact:Do not send SMS

This patient has withdrawn consent to upload clinical documents to MyHealthRecord (except for prescription records and investigation requests)

Do not include in data collection!

Update address for all family members

Auto-capitalise names

Save

Cancel

In Best Practice the opt out is on the 'Edit Patient' screen:

**Edit patient**

Title:		Health Identifier:		Lookup
Family name:	Accept	HI Status:		
Given name:	Three	Medicare No.:		IRN: Expiry:
Middle name:		Pension/HCC No.:		Expiry: 24/03/2020
Preferred name:	Three	Pension card type:		
Date of Birth:	7/06/1960	DVA No.:		Conditions
Age:	59 yrs	Safety Net No.:		
Birth Sex:	Female	Record No.:		Patient ID: 54
Gender Identity:		Usual doctor:		
Pronouns:		Deny access to other users		
Ethnicity:	Aboriginal but not Torres Strait Islander	Usual visit type:		
Address Line 1:	Street	Usual account:	Practice fee	
Address Line 2:		Health Ins. Fund:	0	
City/Suburb:	Sydney	Health Ins. No.:		Expiry: 24/03/2020
Postcode:	2000	Religion:		
Postal Address:		Head of family:	One Accept	Set
City/Suburb:		Next of kin:	One Accept	Set
Home phone:		Emergency contact:		Set
Work phone:		Occupation:		Set
Mobile phone:	0422964125	Health Care Home:	Nil	24/03/2020 HCH
Contact via:	Mobile ph.			
E-mail:				
Consents to:				
<input type="checkbox"/> Opt Out De-identified Data Extraction <input type="checkbox"/> Update address of all family members <input type="checkbox"/> Update address of all currently at original address * These name fields are used for Health Identifier lookups.				
Created By:	Practice	Last Updated By:	Dr. A. Practitioner	
Created On:	16/10/2015	Last Updated On:	09/09/2019 02:42:41 PM	

**General notes:**

**Appointment notes:**

**Contact Notes** **Bp Comms Consent**

**Not Enrolled**

☐ Registered for CTG PBS Co-payment relief

☐ Inactive ☐ Deceased

**Date of death:**

24/03/2020 Cause

**Referral details** **Bank account**

**Save** **Cancel**



Pen CS strongly recommends to use the options shown above for BP and MD users, as this will record the patient's request to opt out of de-identified data collections in the patient record. Once recorded, CAT4 will apply the same rules as detailed below to the data extract. Patients who have opted out, will only be removed from the de-identified data extract, they will still be visible to the clinic and can be used as before for recall and other purposes using CAT4.

For all other clinical systems please continue to use the process described below. As other vendors implement similar opt out functionality, we will update CAT4 accordingly.

Patient '**consent withdrawn**' or patient '**opt-out**' for sharing data can be flagged within CAT. This is set from the patient list and should be used where a patient has requested their data not be used for research purposes. It removes a patient's data completely from any deidentified data files that CAT creates.

Details on how to configure CAT4 correctly for this functionality can be found in the [CAT4 Configuration](#) guide.

There are 2 such types of deidentified file.

#### 1. CAT Deidentified Dataset

CAT has a deidentify tool that creates a copy of the CAT XML files with patient identifying details removed (name, dob, address, medicare number etc). This is the file that is uploaded to PAT CAT for data aggregation.

#### 2. Research project CSV files

Some projects within CAT require deidentified patient level data to be submitted to a project portal for analysis. Such projects are typically research projects that comprise of a control and intervention group of practices.

Projects receiving data will:

1. Have gained ethics approval and
2. Require the practice to have agreed to participate in the project. The practice will usually receive detailed information about the project before agreeing to participate.

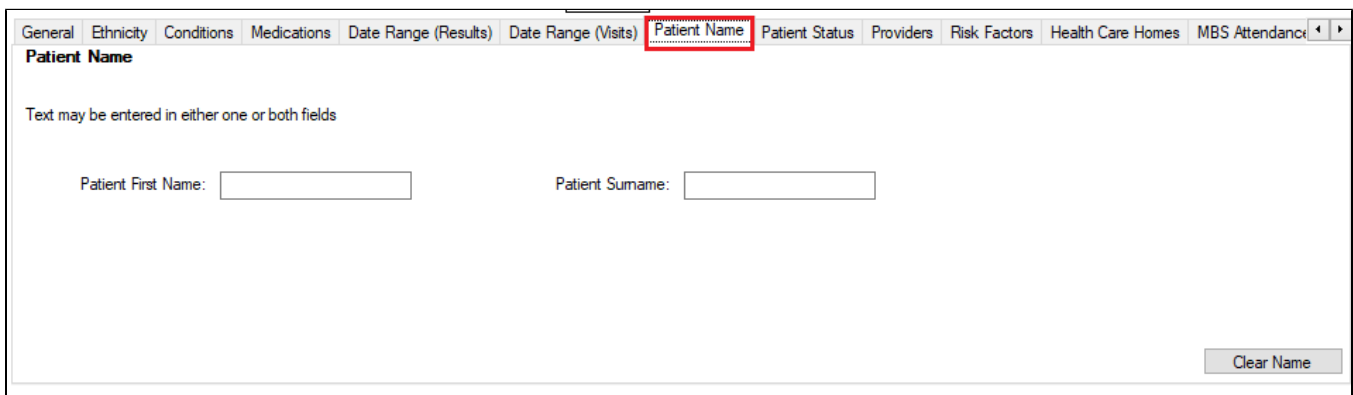
In these projects deidentified patient data is submitted to the project in a .csv file using custom CAT Data Submission functionality.

The patient 'consent withdrawn' functionality removes the patient level data from any deidentified data sent outside the practice.

- The graphs (internal to the practice) are NOT affected.
- Aggregated data /reports are NOT affected.
- The deidentified xml file and csv files, which contain patient level data, have any patient with 'consent withdrawn' removed.

### You only need to set this once for a patient

To make it easy to find a particular patient you can use the 'Patient Name' filter and enter their full name or part of their name and then recalculate:



The screenshot shows a software interface with a tabbed menu at the top. The tabs are: General, Ethnicity, Conditions, Medications, Date Range (Results), Date Range (Visits), Patient Name, Patient Status, Providers, Risk Factors, Health Care Homes, and MBS Attendance. The 'Patient Name' tab is selected and highlighted with a red rectangle. Below the tabs, the section is titled 'Patient Name'. A text instruction reads: 'Text may be entered in either one or both fields'. There are two input fields: 'Patient First Name:' followed by a text box, and 'Patient Surname:' followed by a text box. At the bottom right of the section is a button labeled 'Clear Name'.

Then click on 'View Population' to see the patient/patients and follow the steps below.

1. From the reidentify report choose the **Add/Withdraw Patient Consent for Sharing Data** at the bottom
2. Click **Go**

Patient Reidentification

1 of 1100%FindNext

Reidentify Report [patient count = 1]

Whole Population

ID	Surname	First Name	Known As	Sex	D.O.B	Address	City	Postcode	Phone (H/W)	Ph
13	Andrews	Anna	Anna	F	08/12/1998	2 Kennedy Rd	Demo Town	4523	H:9123 4567 W:9345 6789	01

Extract Details:  
Practice Name: Pen CS Pty Ltd  
BPEExtract  
Extract Date: 25/01/2018 3:12 PM  
Patient Count: 64  
Printed: 29/01/2018 11:31 AM  
Pen CS CAT4 - 4.10.0.9903(4.10.0.9903) - Pen CS

Refine Selection

Add/Withdraw Patient Consent

SMS Recall

Voicemail Recall

Topbar Prompt

The patient selection window will pop up

	First Name	Surname	Known As	Sex	D.O.B.
<input checked="" type="checkbox"/>	DAVID	ANDERSON	DAVID	M	4/0
<input type="checkbox"/>	PENNY	ANDERSON	PENNY	F	4/0
<input type="checkbox"/>	ANNA	ANDREWS	ANNA	F	8/1
<input type="checkbox"/>	FRED	ANDREWS	FRED	M	23/
<input type="checkbox"/>	Graham	Andrews	Graham	M	22/
<input type="checkbox"/>	HEATHER	ANDREWS	HEATHER	F	12/

☐ Select All/None

OK Cancel

3. Tick patients to exclude
4. Click OK to save the selection

To ensure the selected patient data is not saved to the 1) Deidentified file or 2) CSV file that will be sent, you will need to either:

Do a new collect, or

- 1) Delete the deidentified file and rerun the deidentify tool
- 2) Delete the .csv files created and reload (or recalculate) the current data extract

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