

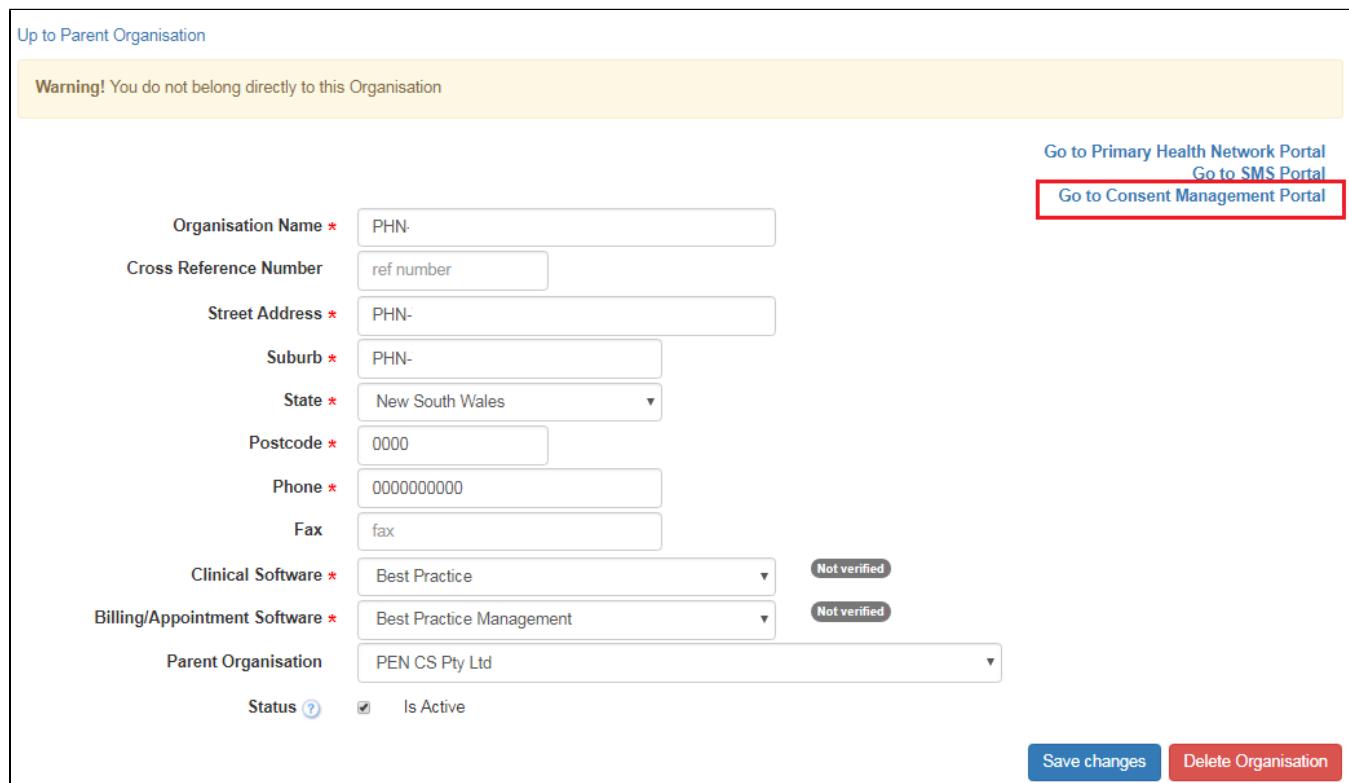
# Consent Management Portal for PHNs/Other organisations

 Unknown macro: 'export-link'

This guide will show you how you can access the consent portal, invite practices and manage enrolled practices. Details on how practices receive invitations and how they can respond are here: [Consent Management Portal Guide for Practices](#)

## Accessing the Consent Management Portal

When logging on to the MyPen portal at <http://users.pencs.com.au/> you will see the option to access the Consent Portal on the top right of your screen:



The screenshot shows a form for entering organization details. At the top, there is a message: "Up to Parent Organisation" and "Warning! You do not belong directly to this Organisation". Below the form fields, there are three links: "Go to Primary Health Network Portal", "Go to SMS Portal", and "Go to Consent Management Portal" (which is highlighted with a red border). The form fields include:

- Organisation Name \*: PHN-
- Cross Reference Number: ref number
- Street Address \*: PHN-
- Suburb \*: PHN-
- State \*: New South Wales
- Postcode \*: 0000
- Phone \*: 0000000000
- Fax: fax
- Clinical Software \*: Best Practice (status: Not verified)
- Billing/Appointment Software \*: Best Practice Management (status: Not verified)
- Parent Organisation: PEN CS Pty Ltd
- Status:  Is Active

At the bottom right are two buttons: "Save changes" (blue) and "Delete Organisation" (red).

## Managing Programs

The portal will show any existing programs. Please note that at this stage new programs can only be created by Pen CS. The example below shows two existing programs, one called 'Data Linkages' and one called 'test program' for my organisation:

**My Programs**

Current Programs

**Consent Demo Program**

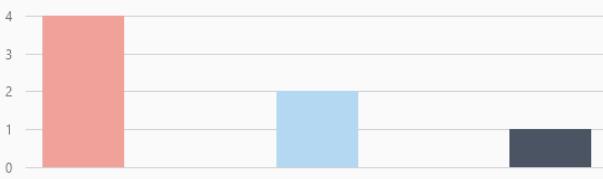
Total Practice Count: 8

1/05/2019 - 30/06/2020

**New Test Consent Program**

Total Practice Count: 7

1/07/2019 - 30/06/2020



## Future Programs

No data to display

## Expired Programs

No data to display

Depending on the scheduled date of a program there can be future programs (start date in the future) or expired programs displayed as well. The colours /numbers indicate the status and number of practices, with the following colour codes:

- red = Pending
- yellow = Requested more information
- blue = Consented
- green = Consented and verified
- Black = invite declined

**Manage Practices in a Program**

Clicking on a program will open the 'Manage Practices' tab and show more details about the invited practices:



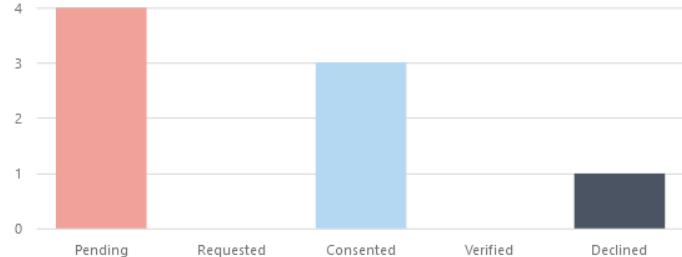
## New Test Consent Program

Total Practices



Program Duration

01 Jul 19  
to  
30/06/2020



Manage Practices

Select Practices

Program Settings

|  | Practice                                | Comments   | Submitted By | Date       | Action   | History | Download |
|--|---|--|--------------|------------|--|---------|----------|
| <span style="color: red;">●</span>       | Edweana's Test Practice                 |  | warren.moore | 29/07/2019 | <span style="color: blue;">✓</span> <span style="color: yellow;">?</span> <span style="color: black;">✗</span> |         |          |
| <span style="color: lightblue;">●</span> | James Test Clinic                       | I accept   | james.alcorn | 26/08/2019 | <span style="color: green;">Verify</span>  |         |          |
| <span style="color: darkblue;">●</span>  | James Testing Clinic - Medical Director | did not want to participate, will get back to us | james.alcorn | 26/08/2019 |  |         |          |
| <span style="color: lightblue;">●</span> | James Testing Clinic - Surface Pro      | Yes we consent                                   | james.alcorn | 2/09/2019  | <span style="color: green;">Verify</span>  |         |          |
| <span style="color: lightblue;">●</span> | Manfred Practice                        | signed and uploaded form                         | Matthias     | 3/09/2019  | <span style="color: green;">Verify</span>  |         |          |
| <span style="color: red;">●</span>       | Matthias Test Clinic                    |  | Matthias     | 30/07/2019 | <span style="color: blue;">✓</span> <span style="color: yellow;">?</span> <span style="color: black;">✗</span> |         |          |
| <span style="color: red;">●</span>       | Warren Moore's Practice                 |  | Matthias     | 29/07/2019 | <span style="color: blue;">✓</span> <span style="color: yellow;">?</span> <span style="color: black;">✗</span> |         |          |
| <span style="color: red;">●</span>       | Yupar's Own Practice                    |  | yupar.nyo    | 29/07/2019 | <span style="color: blue;">✓</span> <span style="color: yellow;">?</span> <span style="color: black;">✗</span> |         |          |

In the program above we have three clinics that have consented and still need to be verified by clicking on the green 'Verify' button. One clinic has declined and four are currently pending. The verification involves reviewing the uploaded consent form and the clicking the 'Verify' button. Any uploaded consent



forms can be accessed by clicking on the download icon

### Consent History



The last column will show a history for each practice by clicking on the clock symbol:

| History   |               |                 |              |
|-----------|---------------|-----------------|--------------|
| Status    | Date Received | Comment         | Submitted By |
| Pending   | 26/08/2019    |                 | james.alcorn |
| Consented | 26/08/2019    | I accept        | james.alcorn |
| Verified  | 3/09/2019     | verified by PHN | Matthias     |

[Close](#)

This history allows for an audit trail in addition to the uploaded consent form.

#### Invite Practices

The 'Select Practices' tab allows you to invite more practices, either all practices by using the tick box on the top left, or individual practices by using their own tick box. You can start typing the name of the practice in the search field to narrow the list down quickly.

| Manage Practices   | Select Practices                   | Program Settings     |
|--|------------------------------------|----------------------|
| Select Practices to be invited to participate in the Program |                                    |                      |
| <input type="checkbox"/>                                     | Practice                           | Postcode             |
| <input type="text" value="ma"/>                              |                                    | <input type="text"/> |
| <input type="checkbox"/>                                     | Manfred Practice                   | 3004                 |
| <input type="checkbox"/>                                     | Manfred Training Practice          | 3004                 |
| <input type="checkbox"/>                                     | Manfred Training Practice - Client | 3004                 |
| <input type="checkbox"/>                                     | Matthias QA Clinic                 | 2000                 |
| <input type="checkbox"/>                                     | Matthias Test Clinic               | 2000                 |
| <a href="#">Save</a>   |                                    |                      |

After inviting practices, click on 'Save' on the bottom right of the tab.

You will then see a confirmation message:

## Save successful

1 practice(s) were invited.

0 practice invitations were revoked.

OK

Invitations can only be revoked (by un-ticking a practice) before the practice has accepted the invite, once they have consented they can't be removed on the 'Select Practices' tab.

The newly added practice is now visible on the 'Manage Practices' tab:

| Manage Practices |   | Select Practices                                 | Program Settings |            |   |  |          |  |
|------------------|---|--|------------------|------------|---|--|----------|--|
|                  | Practice                                | Comments   | Submitted By     | Date       | Action  | History  | Download |  |
| ●                | Edweana's Test Practice                 |  | warren.moore     | 29/07/2019 | <input checked="" type="checkbox"/> <input type="button" value="?"/> <input type="button" value="X"/> | <input type="button" value="D"/>   |          |  |
| ●                | Gareth Test Clinic                      |  | Matthias         | 3/09/2019  | <input checked="" type="checkbox"/> <input type="button" value="?"/> <input type="button" value="X"/> | <input type="button" value="D"/>   |          |  |
| ●                | James Test Clinic                       | verified by PHN                                  | Matthias         | 3/09/2019  |   | <input type="button" value="D"/>   |          |  |
| ●                | James Testing Clinic - Medical Director | did not want to participate, will get back to us | james.alcorn     | 26/08/2019 |   | <input type="button" value="D"/>   |          |  |
| ●                | James Testing Clinic - Surface Pro      | Yes we consent                                   | james.alcorn     | 2/09/2019  | <input type="button" value="Verify"/>   | <input type="button" value="D"/>   |          |  |
| ●                | Manfred Practice                        | signed and uploaded form                         | Matthias         | 3/09/2019  | <input type="button" value="Verify"/>   | <input type="button" value="D"/> <input type="button" value="Download"/> |          |  |
| ●                | Matthias Test Clinic                    |  | Matthias         | 30/07/2019 | <input checked="" type="checkbox"/> <input type="button" value="?"/> <input type="button" value="X"/> | <input type="button" value="D"/>   |          |  |
| ●                | Warren Moore's Practice                 |  | Matthias         | 29/07/2019 | <input checked="" type="checkbox"/> <input type="button" value="?"/> <input type="button" value="X"/> | <input type="button" value="D"/>   |          |  |
| ●                | Yupar's Own Practice                    |  | yupar.nyo        | 29/07/2019 | <input checked="" type="checkbox"/> <input type="button" value="?"/> <input type="button" value="X"/> | <input type="button" value="D"/>   |          |  |

## Program Settings

On the Program Settings tab a consent form can be added for the practices to download and instructions can be added. This could be a simple text or a hyperlink to more details of the program. These details can be edited even after practices have been invited.

| Manage Practices                    | Select Practices  | Program Settings                        |                         |
|-------------------------------------|---|---|-------------------------|
| Consent Form Template:              | <input type="button" value="Upload"/>   | <input type="button" value="Download"/> | consent form sample.pdf |
| Consent Form Instructions:          | <p>Please read, print and sign the attached consent form. You can also sign electronically. After signing please upload the form.</p> |   |                         |
| <input type="button" value="Save"/> |   |   |                         |

## Consent on behalf of practices

If a PHN/other organisation has already completed the consent process for a program with a practice this screen allows you to provide consent on behalf of the practice(s). The options available in the 'Action' column are:

| Manage Practices |                         | Select Practices | Program Settings |            |        |         |          |
|------------------|-------------------------|------------------|------------------|------------|--------|---------|----------|
|                  | Practice                | Comments         | Submitted By     | Date       | Action | History | Download |
|                  | Edweana's Test Practice |                  | warren.moore     | 29/07/2019 |        |         |          |
|                  | Gareth Test Clinic      |                  | Matthias         | 3/09/2019  |        |         |          |

1. Consent to participate in the program
2. Request more information
3. Decline to participate in the program

The history function will store your user name for any action that is performed for an audit trail.