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## Best Practices: Policies and procedures governing distribution of the SCHIEEx Notice to Individuals

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Reference: SCHIEEx Policy Manual, Section 6c

It is the responsibility of the Participant to implement policies and procedures governing the distribution of the SCHIEEx Notice Individuals to patients. These policies and procedures must be consistent with applicable laws and regulations.

If the Participant modified its Notice of Privacy Practices to include the required SCHIEEx language, then the Participant shall follow its internal policies and procedures for distribution.

If the Participant chose to use a separate SCHIEEx Notice, it is to be given to each patient at their first encounter or on their first encounter once the Participant has on-boarded to SCHIEEx. The Participant should attempt to provide patients with a copy of the Notice prior to exchanging the patient's information via SCHIEEx EXCHANGE. After initial distribution, the SCHIEEx Notice can be given to the patient on the same schedule as the organization's Notice of Privacy Practices and follow the same work flow as the consent to treat.

Section 5c of the SCHIEEx Policy Manual requires that the Participant make a good faith effort to obtain the patient's signature that he or she has received the SCHIEEx Notice (whether incorporated into the Participant's Notice of Privacy Practices or as a separate SCHIEEx Notice). If Participant is unable to obtain a patient's signature, the Participant is required to document the efforts to obtain the patient's signature and the reason why it was not obtained.

It is important that the staff distributing the SCHIEEx Notice (whether incorporated into the Participant's Notice of Privacy Practices or as a separate SCHIEEx Notice) to the patients be knowledgeable about SCHIEEx to be able to educate patients, answer questions, and counsel patients on participating in or opting out of SCHIEEx EXCHANGE.

In addition, the Participant must:

- Make the SCHIEEx Notice available to any person who requests it.
- Prominently post and make available the SCHIEEx Notice on any website it maintains.

- Make the latest SCHIEEx Notice available at the Participant's facility for patients to request a copy as well as post the Notice in a clear and prominent location within the facility.

It is recommended that the Participant provide an alternate SCHIEEx Notice for non-English speaking patients and illiterate patients.

If after reviewing the SCCHIEEx Notice a patient chooses to Opt Out of SCHIEEx EXCHANGE, they will be required to complete an Opt Out form. This issue is addressed in *Best Practices: Policies and procedures governing the distribution of the SCHIEEx Notice to Individuals*.

It is highly recommended that the Participant document any new policies and procedures that result from participating in the SCHIEEx EXCHANGE, including those that govern the distribution of the SCHIEEx Notice to Individuals.