



SCHIEEx
1919 Blanding Street
Columbia, SC 29201
Phone: 803-898-9962
Fax: 803-898-9972
E-mail: SCHIEExInfo@ors.sc.gov
www.SCHIEEx.org

Best Practices: Process to allow an individual to opt out of SCHIEEx

Reference: SCHIEEx Policy Manual, Section 7a

Each Participant shall implement processes to allow any individual or the personal representative for that Individual to choose to opt out of having information for that Individual included in or made available, or exchanged through SCHIEEx.

After a patient has reviewed the SCHIEEx Notice to Individuals (or the Notice of Privacy Practices with the required SCHIEEx language), the patient may choose to Opt Out of having his or her information included in, made available, or exchanged through SCHIEEx.

If a patient chooses to Opt Out:

The Opt Out **must** be in writing. A sample SCHIEEx Opt Out form is available here: <http://www.schiex.org/implementation.php>. It is recommended that the staff member executing the patient's Opt Out complete the For Office Use Only section of the form.

The Participant staff must be knowledgeable about SCHIEEx so they may help educate patients about SCHIEEx and answer questions.

If a patient chooses to Opt Out, Participant staff must be able to counsel the patient about their choice to Opt Out. Key points that the Participant's staff should relay to the patient:

- There will be **no** electronic sharing of his or her health information through SCHIEEx EXCHANGE, including in cases of emergency. Other means of sharing health information (fax, postal mail, courier, SCHIEEx DIRECT, etc.) are as allowed by applicable law.
- A patient cannot Opt Out on a provider-by-provider basis.
- A patient may change his or her mind and Cancel the Opt Out at any time.

Should a patient Cancel the Opt Out, the Participant staff should help the patient understand that all available information about the patient, including information about services received during the period of time the patient was Opted Out, may now be included and exchanged.

A Participant's electronic medical records (EMR) system should have a mechanism enabling the Participant to comply with the patient's request to Opt Out. If the EMR does not, SCHIEEx will include a portal enabling the manual control of the flow of information.

It is highly recommended that the Participant document the processes for Opt Out (and Cancel the Opt Out) so that the staff roles and responsibilities are clearly delineated and the patient's wishes are effectively fulfilled in a consistent and timely manner.