



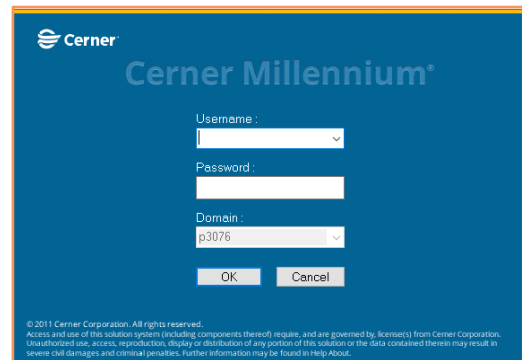
HIM DIRECTOR, PRIVACY MANAGER, FOI SPECIALIST

HIM- Lockbox Process: This workflow is used when a patient requests to restrict access to who can view their records.

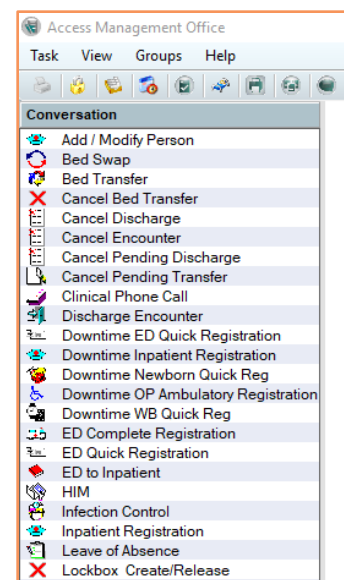
Locking the Encounter

1. Patient submits a **“Lockbox Request Form”** for the discharged encounter(s)

2. Log into **Access Management Office**  as a
From the AppBar



3. Double-click the **“Lockbox Create/Release”** conversation in the Access Management App.





4. Person Search window opens. Search for the patient and select “OK” to lock the encounter.

The screenshot shows a 'Person Search' window with a search criteria panel on the left and a results table on the right. The search criteria panel includes fields for Health Card Number, Patient Last Name (lockmyencounter), Patient First Name (lockbox), MRN, Birth Date (DD-MMM-YYYY), Sex, FIN, Phone Number, Deceased?, and Historical MRN. The results table displays patient information and encounter details.

MRN	Patient Name	Health Card Number	VC	Sex	Birth Date (DD-MMM-YYYY)	Age	Phone Number	D
11002415	LOCKMYENCOUNTER, LOCKBOX	2168-431-341		MA	22/Jun/1993	31 Years		

Facility	MRN	FIN	Visit Id	Patient Type	Reg Date (DD-MMM-YYYY)	Expected Date of Arrival	Disch Date (DD-MMM-YYYY)
SCS	11002415	22-002479	22-003508	Inpatient	2024-Jun-06 16:34		2024-Jun-06 16:34

Buttons at the bottom: OK, Cancel, Preview, Add Person, Add Encounter



5. The Lockbox Create/ Release conversation opens.

Images

Last Name: LOCKMYENCOUNTER | First Name: LOCKBOX | Middle Name: | Preferred First Name: | Previous Last Name: | Previous First Name: |

What was your sex assigned at birth...: | What is your current sex: | Birth Date (DD-MMM-YYYY): 22/Jun/1993 | Age: 31Y | Medical Record Number: 11002415 | FIN: 22-002479 |

Provincial Health Card Information

*Health Card Available?: Yes | Health Card Number: ON | 2168-431-341 | Version Code: IMA | Health Card Expiry Date: 13/Jun/2026 | HCV Response Code: | Visit Response Code: |

Visit Validation Date: 06/Jun/2024

LOCATION

Facility: SCS | Building: SCS | Inpatient/Ambulatory Unit: | Room: | Bed: | Bed Availability: |

Encounter Type: Inpatient | Service: | Reason For Visit: | Attending Provider: |

CONFIDENTIALITY LEVEL

Confidentiality Level: Lockbox | *HIE Consent: No

LOCKBOX ENCOUNTER CREATION

Registration Date: 06/Jun/2024 | Registration Time: 16:34 | Discharge Date: 06/Jun/2024 | Discharge Time: 16:34

Lockbox Comments (Optional):
Testing

OK Cancel

6. Modify the Registration Date and Time if applicable. Add a comment in the Lockbox Comment section if needed.



7. Select the drop-down menu to Answer HIE Consent: “Yes” or “No.”

Lockbox Create/Release

Images

Last Name: ZZZTEST First Name: ONE Middle Name: Preferred First Name: Previous Last Name: Previous First Name: What was your sex assigned at birth...: Male What is your current sex?: Male

Birth Date (DD-MM-YYYY): 23/Nov/1959 Age: 64Y Medical Record Number: 11053165 FHL: -

Provincial Health Card Information

*Health Card Available: Yes Health Card Number: ON 1234-567-890 Version Code: Health Card Expiry Date: HCV Response Code: Visit Validation Date:

LOCATION

Facility: NFS Building: NFS Inpatient/Ambulatory Unit: Room: Bed: ENCOUNTER INFORMATION Encounter Type: Lockbox Service: Lockbox

Reason For Visit: LOCKBOX Attending Provider:

CONFIDENTIALITY LEVEL

Confidentiality Level: *HIE Consent: No

LOCKBOX ENCOUNTER CREATION

Registration Dates: 17/Sep/2024 Registration Time: 11:47 Discharge Date: 17/Sep/2024 Discharge Time: 11:47

Lockbox Comments (Optional):

Collection Notes:

Previous Collection Notes:

Ready NHSHMMGR01 | T3076 | 17/Sep/2024 | 11:54

OK Cancel



8. Select OK at the bottom right of the screen to save the Lockbox Encounter Conversation

Lockbox Create/Release

Images

Last Name: LOCKMYENCOUNTER	First Name: LOCKBOX	Middle Name:	Preferred First Name:	Previous Last Name:	Previous First Name:
What was your sex assigned at birth... [Dropdown]	What is your current sex?: [Dropdown]	Birth Date (DD-MMM-YYYY): 22/Jun/1993	Age: 31Y	Medical Record Number: 11002415	FIN: 22-002479
Provincial Health Card Information					
*Health Card Available?: Yes	Health Card Number: ON 2168-431-341	Version Code: MA	Health Card Expiry Date: 13/Jun/2026	HCV Response Code: [Dropdown]	Visit Response Code: [Dropdown]
Visit Validation Date: 06/Jun/2024					
LOCATION					
Facility: SCS	Building: SCS	Inpatient/Ambulatory Unit: [Dropdown]	Room: [Dropdown]	Bed: [Dropdown]	Bed Availability
Encounter Type: Inpatient	Service: [Dropdown]	Reason For Visit: [Text]	Attending Provider: [Text]	[Search]	
CONFIDENTIALITY LEVEL					
Confidentiality Level: Lockbox	*HIE Consent: No				
LOCKBOX ENCOUNTER CREATION					
Registration Date: 06/Jun/2024	Registration Time: 16:34	Discharge Date: 06/Jun/2024	Discharge Time: 16:34		
Lockbox Comments (Optional): Testing					

OK Cancel



9. Access the "Lockbox " Worklist from Access Management Office, to confirm encounter is locked

Patient Name	Confid Level	Patient Type	Reg Date/Time	Facility	Building	Location	Med Service
HIMFOURTYFIVE, ANYTE...	Lockbox	Outpatient in...	2024-May-30...	SCS	SCS		Obstetrics
HIMFOURTYFIVE, ANYTE...	Lockbox	Inpatient	2024-Jun-03 ...	SCS	SCS	SC AN...	Orthopaedic Surg...
ITTWO, SADV	Lockbox	Emergency	2024-Aug-07...	PCS	PCS	PC UCC	Emergency
LOCKMYENCOUNTER, LO...	Lockbox	Inpatient	2024-Jun-06 ...	SCS	SCS		
SYSTEMTEST_HIMEFOUR...	Lockbox	Inpatient	2024-May-21	SCS	SCS	SC 2BB	Family Medicine

Note: Monitor Lockbox worklist in PM Office. Review locked/privacy encounters as needed.

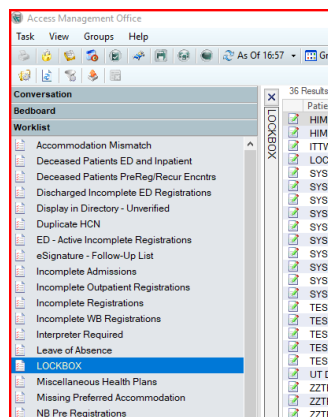
This concludes Locking the encounter



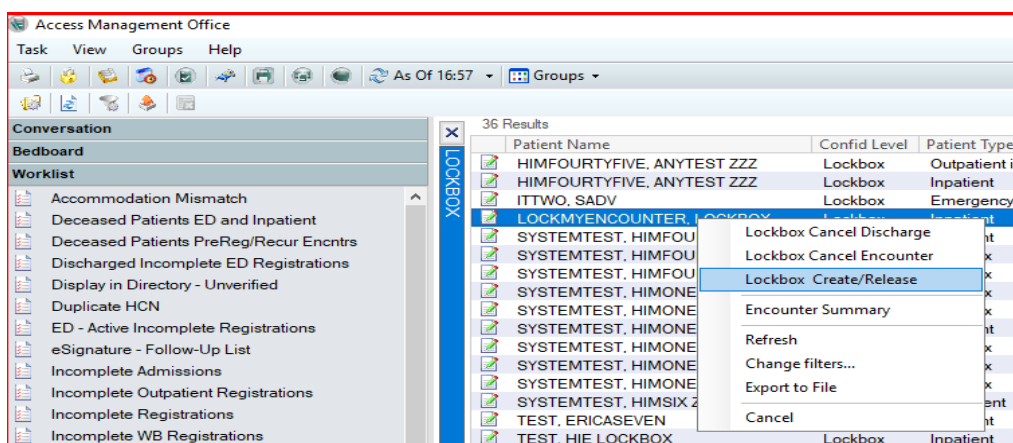
RELEASE LOCKBOX ENCOUNTER/REMOVING LOCKBOX

Note: Monitor Lockbox worklist in PM Office. Review locked/privacy encounters as needed.

1. Access the **"Lockbox Worklist"** in PMOffice/Access Management. Double-click on the **LOCKBOX**.



2. Right Click on the Encounter info on worklist and click "Lockbox Create/Release"





3. Lockbox Create/Release message populates "Are you discontinuing the lockbox designation?". Select "Yes."

Lockbox Create/Release

Are you discontinuing the lockbox designation?

Yes No

4. Lockbox Create/Release conversation opens. Remove /Add Lockbox Comments if needed. Select **OK**.

Lockbox Create/Release

Images

Last Name: LOCKMYENCOUNTER First Name: LOCKBOX Middle Name: Preferred First Name: Previous Last Name: Previous First Name:

What was your sex assigned at birth: What is your current sex?: Birth Date (DD-MMM-YYYY): 22/Jun/1993 Age: 31Y Medical Record Number: 11002415 FIN: 22-002479

Provincial Health Card Information

*Health Card Available: Yes Health Card Number: ON 2168-431-341 Version Code: IMA Health Card Expiry Date: 13/Jun/2026 HCV Response Code: Visit Response Code:

Visit Validation Date: 06/Jun/2024

LOCATION

Facility: SCS Building: SCS Inpatient/Ambulatory Unit: Room: Bed: Bed Availability

Encounter Type: Inpatient Service: Reason For Visit: Attending Provider:

CONFIDENTIALITY LEVEL

Confidentiality Level: No *HIE Consent: No

LOCKBOX ENCOUNTER CREATION

Registration Date: 06/Jun/2024 Registration Time: 16:34 Discharge Date: 06/Jun/2024 Discharge Time: 16:34

Lockbox Comments (Optional): Testing

OK Cancel

5. On Lockbox Worklist, Lockbox Encounter is now lifted and is no longer on the list.