A Phased Plan for **real-world consent forms**

🧩 Phase 1 — Foundational Forms (MVP / First Iteration)

Focus: essential consents enabling treatment, data sharing, and compliance — directly tied to your *Patient Portal* and *Clinic Console*.

1. General Consent to Treat

- **Purpose:** Authorize care delivery and basic information sharing within a clinic/hospital.

- **Model Example:** [Appledore Medical Group – General Consent to Treat Form]

- **Why first:** It's universally required, easy to digitize, and aligns with /consent/approve in your Gateway API.

2. HIPAA Privacy Acknowledgment

- **Purpose:** Patient acknowledgment that their PHI may be used for treatment, payment, and operations.

- **Model Example:** [Lang Orthodontics – HIPAA Consent and Acknowledgment]

- **Why first:** Establishes legal foundation for PHI processing; can feed into your *ConsentRegistry*'s "default consent scope."

3. Health Information Exchange (HIE) Opt-In/Opt-Out

- **Purpose:** Allow or deny sharing via regional/national networks (Epic CareEverywhere, Healthix, etc.).

- **Model Example:** [NYU Langone / Healthix HIE Consent Form]

- **Why first:** Direct tie to your smart contract's **grant/revoke consent** logic and time-bounded scopes.

🧠 Phase 2 — Extended Use Forms (Pilot Stage)

Focus: multi-party workflows between hospitals, research teams, and patient representatives.

4. Authorization for Release of Medical Records

- **Purpose:** Permit sharing with specific providers, researchers, or organizations.
- **Model Example:** [NY State OCA 960 – HIPAA Authorization for Release of Health Information]
- **Why second:** Expands beyond general consent—requires patient-driven selection of recipients; matches purpose-of-use in your policy engine.

5. Telehealth Consent Form

- **Purpose:** Obtain permission for video visits, remote diagnosis, and storage of telemedicine data.
- **Model Example:** [Cleveland Clinic Telehealth Consent PDF]
- **Why second:** Adds remote access and data retention scope, useful for demonstrating multi-modal EHR interoperability.

6. Clinical Trial / Research Consent

- **Purpose:** Explicit consent for de-identified data usage or research participation.
- **Model Example:** [NIH Informed Consent Template (Common Rule compliant)]
- **Why second:** Integrates naturally into your **Phase 2 "Research Workspace"** in the roadmap

EHR

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🔓 Phase 3 — Advanced & Specialized Forms (Expansion)

Focus: higher complexity, multi-jurisdiction, and purpose-limited consent structures.

7. Granular Consent for AI Analytics or Data Monetization

- **Purpose:** Patient opts into allowing anonymized or federated data use for model training, predictive care, etc.
- **Model Example:** [Google Health Research Data Use Consent Form (public NIH studies)]
- **Why third:** Matches your future "tokenless credit incentive" mechanism

EHR

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8. Revocation / Expiration of Consent Notice

- **Purpose:** Define clear patient-initiated withdrawal and automatic expiration flows.

- **Model Example:** [HEALTHeLINK Revocation Form]

- **Why third:** Implements your *ConsentRevoked* event trigger and audit logging on the blockchain.

9. Emergency Access / Break-the-Glass Consent

- **Purpose:** Preauthorize limited data access in emergencies.

- **Model Example:** [Epic's Break-Glass Emergency Disclosure template (FHIR-adapted)]

- **Why third:** Supports future smart-contract conditional access logic (e.g., jurisdiction flag or override scope).

📋 **Summary Table**

Phase	Type of Form	Real-World Model	App Mapping	Contract / API Link
1	General Consent to Treat	Appledore / Kaiser	Patient Portal	POST /consent/approve
1	HIPAA Acknowledgment	Lang Orthodontics	Clinic Console	ConsentGranted event
1	HIE Opt-In/Out	NYU Langone / Healthix	Patient Portal	ConsentRevoked event
2	Release of Info	NY OCA 960	Hospital Admin	purpose & audience fields
2	Telehealth	Cleveland Clinic	Patient Portal	scopes[] for telemed
2	Research Consent	NIH Template	Research Workspace	cohort consent
3	AI/Analytics	Google Health	Research/Policy Engine	policyFlags.AIUse
3	Revocation Notice	HEALTHeLINK	Patient Portal	ConsentRevoked
3	Emergency Access	Epic Template	Hospital Admin	policyFlags.breakGlass