MicroTraining

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| **Slide #:** | **Script:** |
| 1 | **Harmony**: Kenny and Polly are coworkers at a social services agency. As Kenny heads to the mailroom, Polly notices something concerning… |
| 2 | **Kenny:** “Hey, I’m on my way to the mailroom – I’ve got to send out some file documents. Want to grab lunch after?”  **Polly:** “What are you mailing?”  **Kenny:** “One of my consumers asked me to send some documents from their file to the Social Security office.”  **Polly:** “Wait... are you sure that’s okay?”  **Kenny (laughing):** “Lunch is always okay!”  **Polly:** “I mean the mailing. Are you sure it’s compliant with our agency’s privacy policies?”  **Kenny:** “I figured I’d just slide them in an envelope and send them off. No biggie.” |
| 3 | **Narrator (Harmony):** Polly knows that mailing consumer records isn’t as simple as putting a stamp on an envelope. |
|  | **Polly:** “Kenny, your stomach’s call for tacos might be loud, but mailing consumer records is louder in terms of compliance. Let’s double-check the Right to Access PHI under HIPAA before we accidentally turn lunch into a privacy incident.” |
| 4 | **Polly:** “When mailing out records, we need to ensure we’ve made reasonable efforts to provide only the minimum amount of PHI necessary to accomplish the intended purpose.”  **Kenny:** “I see. There’s a lot more to this than I thought.”  **Polly:** “Your consumer has a right to access and obtain a copy of their PHI, and they can request it be sent to a third party like the Social Security Office. But it’s a process. Was the request made in writing? Were releases signed? And if needed, was it submitted to our Senior Compliance and Privacy Officer for review?”  **Kenny:** “Wow, that one almost slipped through the cracks. Thanks, Polly. This is a good reminder of how important it is to know our agency’s policies—for the safety of the consumer and ourselves.”  **Kenny:** “I’ll take the appropriate steps right after lunch.” |
| 5 | **Narrator (Harmony):**  Let’s do a quick knowledge check. On the next slide, there are four statements inside the green shapes. Drag each shape to the box labeled true or false based upon your judgement. Once all shapes are placed, click the submit button to continue. |
|  | * True or False: You should obtain a request and signed releases before mailing a consumer’s records. * True or False: It is necessary to ensure that only the minimum necessary PHI is disclosed. * True or False: If unsure about any record disclosures, you should consult your agency’s compliance officer. |
| 6 | **Narrator (Harmony):** “Thank you for your time today.  Remember,your choices matter. Whether you are responding to a consumer’s request or reporting a compliance concern, every action contributes to a culture of integrity and helps to build a strong compliance program.  Click the buttons below to exit or restart this training.” |

**Scene-by-Scene Visual Suggestions**

**Scene 1: Casual Start**

* **Visual 1**: Kenny walking down a hallway with a mail envelope in hand.
* **Visual 2**: Polly looking curious or concerned, standing nearby.
* **Visual 3**: Speech bubbles for dialogue to keep it light and conversational.

**Scene 2: Compliance Clarification**

* **Visual 4**: A red flag icon or alert symbol when Polly questions Kenny’s plan.
* **Visual 5**: A split-screen showing:
  + Left: Kenny casually dropping an envelope in a mail bin.
  + Right: A checklist titled “PHI Compliance Steps” with items like:
    - ✅ Written request
    - ✅ Signed release
    - ✅ Compliance Officer review
* **Visual 6**: A lock icon over a file folder labeled “Consumer Records” to represent data protection.

**Scene 3: Key Takeaways**

* **Visual 7**: A simplified infographic showing the PHI mailing process:
  1. Receive written request
  2. Verify signed release
  3. Review with compliance officer
  4. Mail securely
* **Visual 8**: Kenny and Polly smiling at a lunch table with a caption: “Compliance first, tacos second!”