

Client Requested, County Facilitated, Opt Out

- County must verify identity of client request Opt Out.
 - o If authorized individual, proper justification, and documentation must be in place authorizing the request on behalf of the client.
- County must document Opt Out request in SmartCare via Client Information custom field section.
- County can also opt to have client complete Opt Out form, scan document, and upload to client's record in SmartCare. (Optional but recommended)

Client Requested, Direct to CalMHSA, Opt Out

- Client must complete Opt Out form and contact CalMHSA at OptOut@calmhsa.org.
- Client must provide identification along with Opt Out form.
 - o Address on identification must match address on HIE record.
 - o If authorized individual, proper justification, and legal documentation must be in place authorizing the request on behalf of the client. If such documentation cannot be provided, request will be referred to the county to facilitate.
 - o If request is for minor under the age of 12, regardless of parental/guardian/custodian consent, they will be referred to county to complete Opt Out.

County Required Opt Out

- County must have proper justification for restricting client data via Opt Out. (i.e. Court ordered data restriction.)
- County must document Opt Out request in SmartCare via Client Information custom field section.

*All received Opt Out requests will be completed within 2 business days of receipt provided proper documentation is present.