Patient/Parent Mail-based Disclosure Checklist
For Organizations Using CAIR

This Checklist will help ensure that your Organization has the resources and tracking mechanisms in place to ensure that the CAIR Patient/Parent Mail-based Disclosure policy is followed.

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<th>ACTIVITY</th>
<th>TASK</th>
<th>DONE</th>
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| Pre-mailing logistics     | Decide which of your patients/clients will receive the CAIR Disclosure mailing (e.g., patients under 6 years of age? Under 18 years of age? All patients?).  
  • Determine the number of patients/parents who will receive the mailing.  
  • How will postage for the mailing be paid for?  
  • How will copying/printing of Cover Letter and Registry Notice be paid for?  
  • How will envelopes and labels be paid for?  
  • Ensure that mailing labels or printed envelopes can be produced.  
  • Ensure you can track which patients/parents were sent the mailing – either on paper or in your EHR. | ☐   |
|                           | Although the CAIR Help Desk contact information will be listed in the Cover Letter and Registry Notice for patients/parents to call if they have questions or would like to decline to share their CAIR record, your patients/parents may call your Organization. You should ensure your staff are able to:  
  1. Answer basic questions (e.g., have a basic understanding of CAIR, the information in the mailing, your CAIR participation, and direct patients to the Decline to Share form if they want to decline to share their record).  
  OR  
  2. Direct all inquiries to the CAIR Help Desk. | ☐   |
|                           | Obtain from the CAIR website:  
  • Sample Cover Letter (you will need to add your Organization’s name and put the letter on your letterhead)  
  • CAIR Registry Notice (available in multiple languages) | ☐   |
| Tracking                  | Develop a procedure to mark patients/clients as “Disclosed” (i.e., mail was not returned as ‘undeliverable’) or “Not-disclosed” (i.e., mail was returned as ‘undeliverable’) either on paper or in your EHR. Only patients/clients that have received the disclosure mailing may be entered into CAIR. | ☐   |
|                           | Develop a plan for conducting disclosure with patients/clients whose mailing was returned (e.g., resend mailing with correct address, mark that these patients/parents need to be disclosed when they come into the Organization). | ☐   |
| Mailing                   | Obtain approval of your Cover Letter from your CAIR contact.  
  • Translate Cover Letter into Spanish (and any other language you need).  
  • Prepare the mailing – with approved Cover Letter and Registry Notice, in minimum of English and Spanish.  
  • Conduct mailing.  
  • Track mailing results, per the above. | ☐   |
| Entering records into CAIR| Once the 30-day waiting period has elapsed:  
  • If entering records directly into CAIR, ensure that staff is available to enter these records and begin entering these records (Note: Staff must have received CAIR training and user accounts from CAIR staff)  
  • If providing records electronically to CAIR from your EHR, create and begin sending these files to CAIR (Note: Your Organization must have received approval from CAIR to submit data electronically)  
  REMINDER: Only records of patients whose mail was not returned may be entered into CAIR and/or included in your electronic files. | ☐   |
| Decline to Share Policy   | Remember to follow the CAIR Patient/Parent Sharing Policy for any patient/parent who declines to share their record at any time. | ☐   |