

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.

ACTIVITY	TASK
Pre-mailing logistics	<ul style="list-style-type: none"> <input type="checkbox"/> 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?). <input type="checkbox"/> Determine the number of patients/parents who will receive the mailing. <input type="checkbox"/> How will postage for the mailing be paid for? <input type="checkbox"/> How will copying/printing of Cover Letter and Registry Notice be paid for? <input type="checkbox"/> How will envelopes and labels be paid for? <input type="checkbox"/> Ensure that mailing labels or printed envelopes can be produced. <input type="checkbox"/> Ensure you can track which patients/parents were sent the mailing – either on paper or in your EHR.
Pre-mailing logistics	<p>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:</p> <ul style="list-style-type: none"> <input type="checkbox"/> 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). <input type="checkbox"/> OR Direct all inquiries to the CAIR Help Desk.
Pre-mailing logistics	<p>Obtain from the CAIR website:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Sample Cover Letter (you will need to add your organization’s name and put the letter on your letterhead) <input type="checkbox"/> CAIR Registry Notice (available in multiple languages)
Tracking	<ul style="list-style-type: none"> <input type="checkbox"/> 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. <input type="checkbox"/> 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	<ul style="list-style-type: none"> <input type="checkbox"/> Obtain approval of your Cover Letter from your CAIR contact. <input type="checkbox"/> Translate Cover Letter into Spanish (and any other language you need). <input type="checkbox"/> Prepare the mailing – with approved Cover Letter and Registry Notice, in minimum of English and Spanish. <input type="checkbox"/> Conduct mailing. <input type="checkbox"/> Track mailing results, per the above.
Entering records into CAIR	<p>Once the 30-day waiting period has elapsed:</p> <ul style="list-style-type: none"> <input type="checkbox"/> 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) <input type="checkbox"/> 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) <p>REMINDER: Only records of patients whose mail was not returned may be entered into CAIR and/or included in your electronic files.</p>