

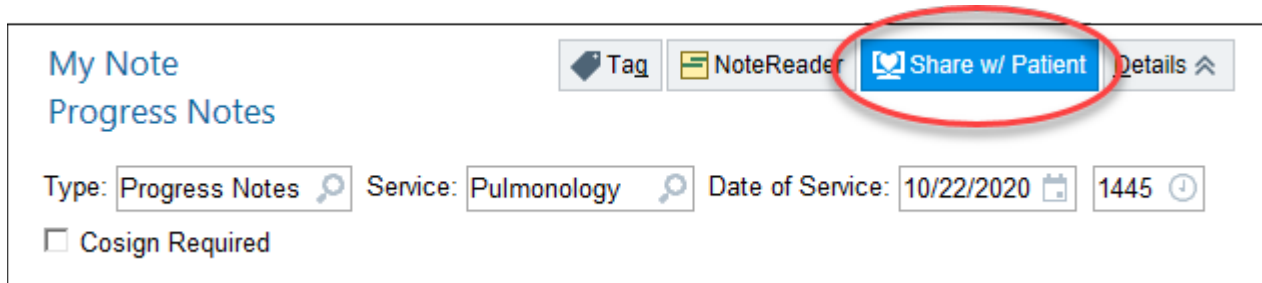
## Restrict Note from Being Shared

The 21<sup>st</sup> Century Cures Act requires notes to be shared with the patient by default. There are situations you will want to take steps to prevent a note from being shared. Epic will require you to document the reason for not sharing the note with a patient (starting 4/7/2021).

### Note Shared by Default:

- Most clinical notes signed in Epic are shared with the patient via MyChart

**Share w/ Patient** button is auto-selected and highlighted to show note will be shared.



The screenshot shows the Epic MyChart interface for creating a note. At the top, there are buttons for 'Tag', 'NoteReader', 'Share w/ Patient', and 'Details'. The 'Share w/ Patient' button is highlighted with a red circle. Below these buttons, there are input fields for 'Type: Progress Notes', 'Service: Pulmonology', 'Date of Service: 10/22/2020', and '1445'. There is also a checkbox for 'Cosign Required' which is currently unchecked.

**Important:** Notes written using Haiku, Canto, or Rover will be shared without offering the ability to not share the note.

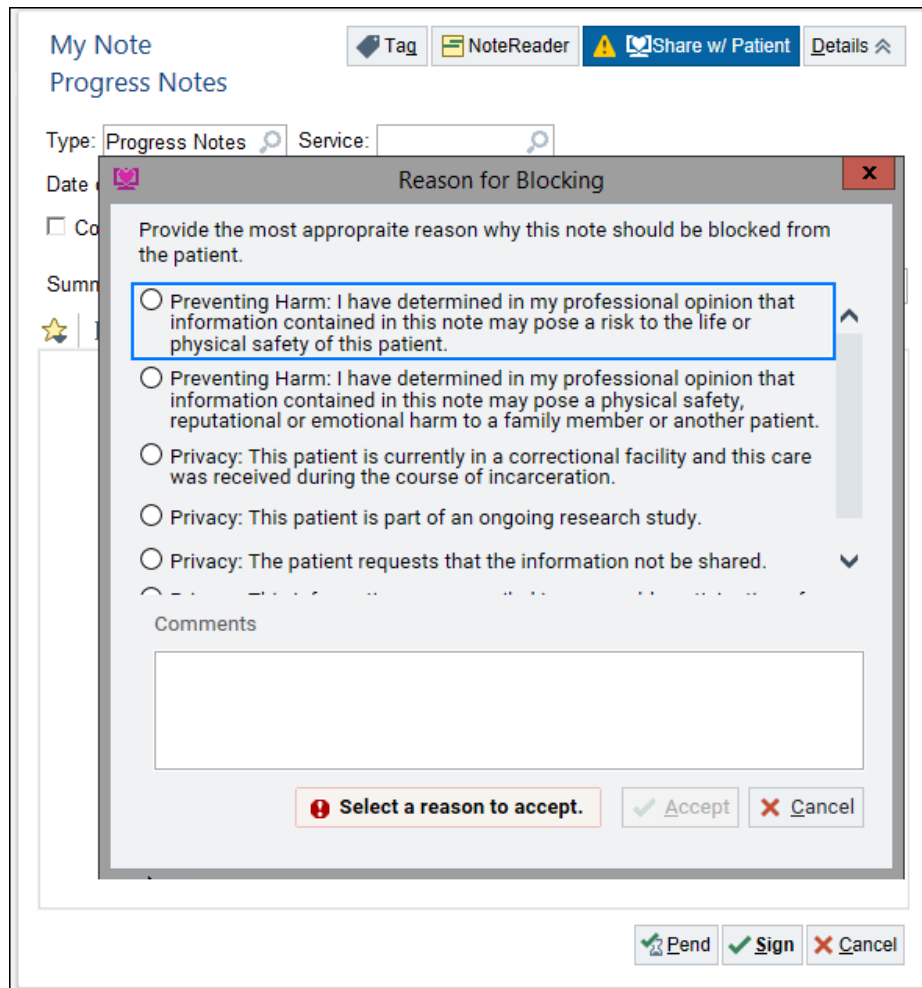
### Approved Reasons to Not Share Note:

There are only a few approved reasons to not share a note with the patient.

- Preventing Harm: I have determined in my professional opinion that information contained in this note may pose a risk to the life or physical safety of this patient.
- Preventing Harm: I have determined in my professional opinion that information contained in this note may pose a physical safety, reputational or emotional harm to a family member or another patient.
- Privacy: This patient is currently in a correctional facility and this care was received during the course of incarceration.
- Privacy: This patient is part of an ongoing research study.
- Privacy: The patient requests that the information not be shared.
- Privacy: This information was compiled in reasonable anticipation of, or for use in, a civil, criminal, or administrative action or proceeding.

# Document Reason for Not Sharing a Note

1. Unselect **Share w/ Patient** button. The Reason for Blocking window will open.
2. **Choose** from one of the allowed reasons for blocking the note. The limited list has the only reasons allowed by law. You will not be able to block the note unless you select a reason.
3. Click **Accept**, finish your note, and sign it.



## What the Patient Will See

Once a shared note is signed, the patient will see it under the related visit/encounter.

The physician's full name will display with the shared note. First names only will display for other clinicians.

If a clinician enters their full name in the body of the note (either manually or with a link that pulls the info), it will be visible to the patient in the note.

Notes will be visible in the patient's MyChart.