Documenting the Reason for Withholding Notes or Test Results from MyChart
Guidance from the Office of Healthcare Compliance and Privacy

The Information Blocking Rule generally requires that patients have immediate access upon request to certain electronic health information. As a result, final notes and most test results are released automatically to MyChart.

You may WITHHOLD notes or test results from MyChart by selecting “Manual Release” in Epic, BUT only for specific reasons, as follows:

1. **Patient/Proxy Request.** Any patient (or their authorized representative) may request results or notes NOT be released to MyChart. For example, a patient may prefer to receive the results of a particular test directly from you at a time when you can answer their questions.

2. **Unreasonable Risk of Harm.** To withhold notes or test results from MyChart for this reason, you must have a reasonable belief that withholding the information from MyChart will substantially reduce a risk to life or physical safety of the patient or another person. Concern that a particular test result or note will be upsetting to the patient is NOT sufficient justification. See below for Tips Regarding Unreasonable Risk of Harm.

**Tips Regarding Unreasonable Risk of Harm**

- “Harm” in this context means a true safety concern. Harm does NOT include perceived psychological or emotional harm.
  - It is NOT appropriate to select “unreasonable risk of harm” based on a concern that a particular result or note will confuse or devastate the patient.
    - In these circumstances, consider discussing in advance with the patient to provide them an opportunity to request that you withhold the result/note from MyChart. If the patient then makes such a request, select “Patient Request” as the reason for withholding the information from MyChart.)
    - If the patient wants to see the information on MyChart even after discussion, the information should be released to MyChart.
  - When selecting “unreasonable risk of harm,” clinicians must additionally document a patient-specific reason why withholding the results/note from MyChart would substantially reduce a risk of harm to the patient or another person.
    - Documenting “unreasonable risk of harm” is not sufficient.

**Compliance Alert:** If you fail to document a patient-specific reason when withholding from MyChart based on risk of harm, a COMPLIANCE ALERT will appear in Storyboard.

**PLEASE FOLLOW THE ACCOMPANYING INSTRUCTIONS TO ADD THE REQUIRED DOCUMENTATION AND CLOSE OUT THE COMPLIANCE ALERT.**

If you have any questions, please contact the Office of Healthcare Compliance and Privacy at x4177 or compliance.officer@uchc.edu.
Withholding Notes or Test Results from MyChart ("Manual Release") in EPIC

- If you select Manual Release to prevent release of a note or test result to MyChart, you will receive the pop-up below.

- Epic prompts you to select one of 3 reasons for withholding the result/note from MyChart. If you select “unreasonable risk of patient harm,” you MUST additionally document, in the “Comments” field, a patient-specific reason why withholding the information from MyChart substantially reduces a risk of harm to the patient or another person.

- If you do not enter a reason, a Compliance Alert will appear in Storyboard.

**TO RESOLVE A COMPLIANCE ALERT AND ADD THE REQUIRED DOCUMENTATION:**

1. Click on the Compliance Alert.
2. Select “Link to notes.”

3. Select “Addendum.”
4. Select “Share w/Patient.”

5. Select “Modify Reason” and enter the patient-specific reason.
6. Enter the patient-specific reason in the **Comments** and **Accept**.

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