

## 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](mailto: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.

Reason for Blocking

You must provide a patient-specific reason why this note should not be released to the patient's MyChart

Patient request

Patient proxy request

An unreasonable risk of patient harm (MUST document PATIENT-SPECIFIC REASON in the box below before accepting!)

Comments

Select a reason to accept. Accept Cancel

- 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.

Hyperspace - Proof of Concept Environment (POC) - HOSPITALIST V - A

Asap, Arrivals

Chart Review Summary Results Review Problem List Notes Orders Charges HDA Admission Transfer Discharge Advance C

Arrivals Asap

Male, 85 y.o., 3/19/1936  
MRN: T20000435  
CSN: 20161957  
Bed: UT 6 MED ONC-6626-P  
Code: DNR/DNI, Has ACP Note

COVID-19: Unknown  
Isolation: None

Compliance Alert

COVID-19 Vaccine Eligible  
No assigned nurse  
Care Team: No PCP

ALLERGIES  
No Known Allergies

CrCl/Lab: No successful lab value found.  
Weight Bearing: Unrestricted

ADMITTED: 7/21/2020 (281 D)  
Patient Class: Inpatient  
Pain

Height: 190.5 cm (75")

Notes

Number of notes shown: 1 out of 1. More to load.

Sort: Date Note Type Service More

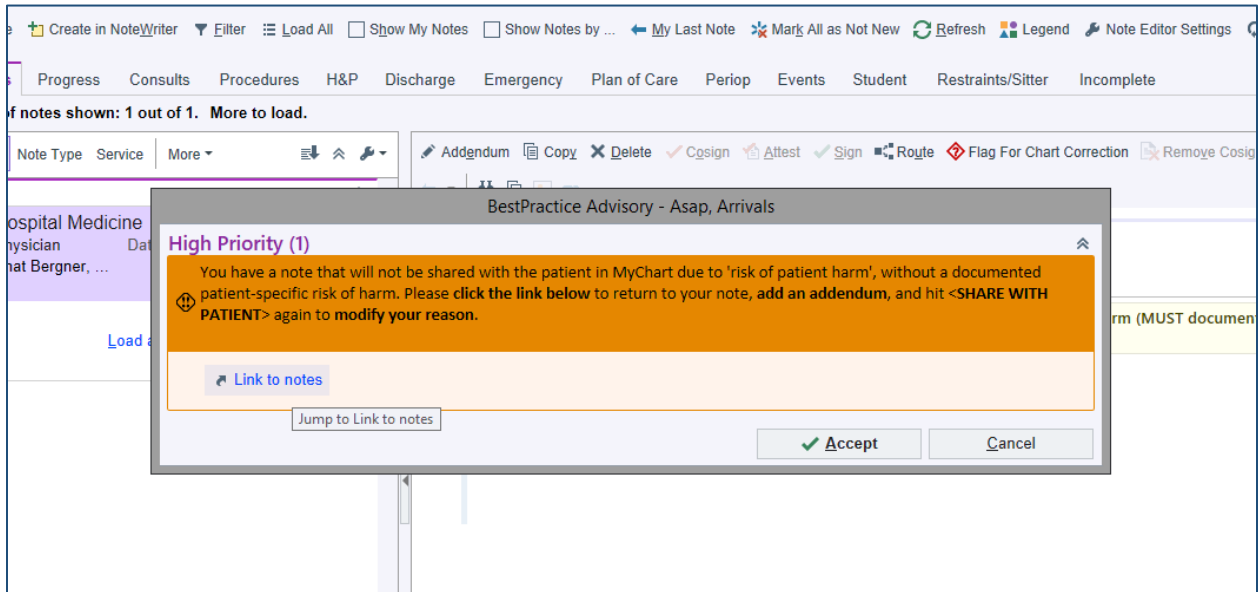
Yesterday

Hospital Medicine Progress Notes  
Physician Date of Service: 04/27 9:02 AM

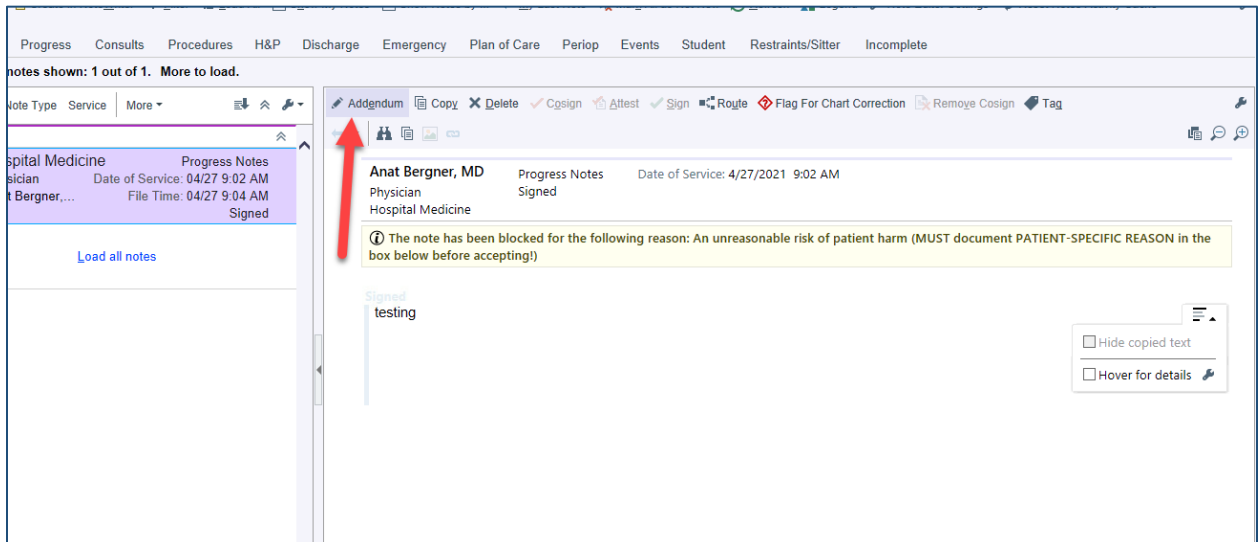
Anat Bergner, MD Progress Notes Date of Service: 4/27/2021 9:02 AM

You have a note that will not be shared with the patient in MyChart due to 'risk of patient harm', without a documented patient-specific risk of harm. Please click the link below to return to your note, add an addendum, and hit <SHARE WITH PATIENT> again to modify your reason.

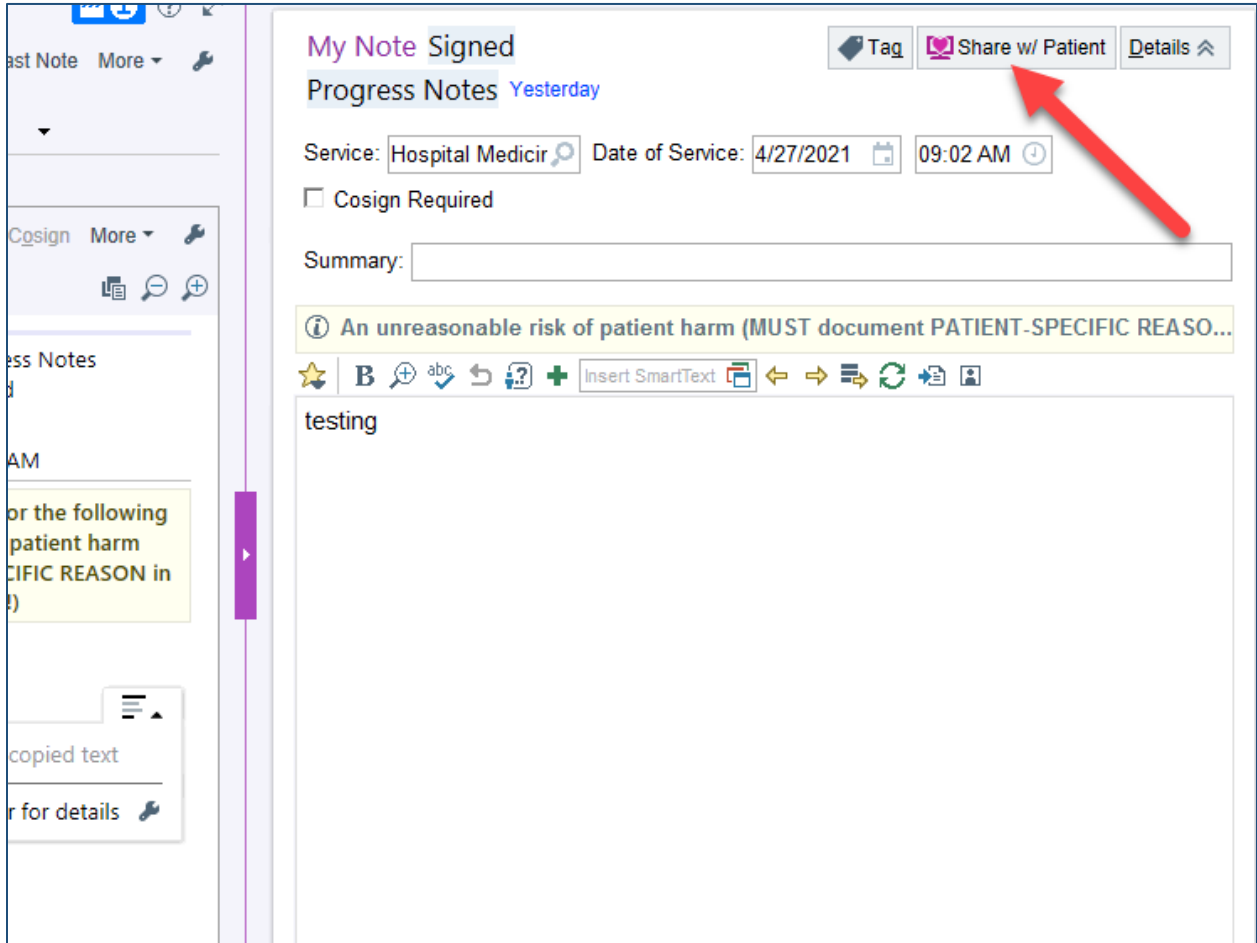
## 2. Select "Link to notes."



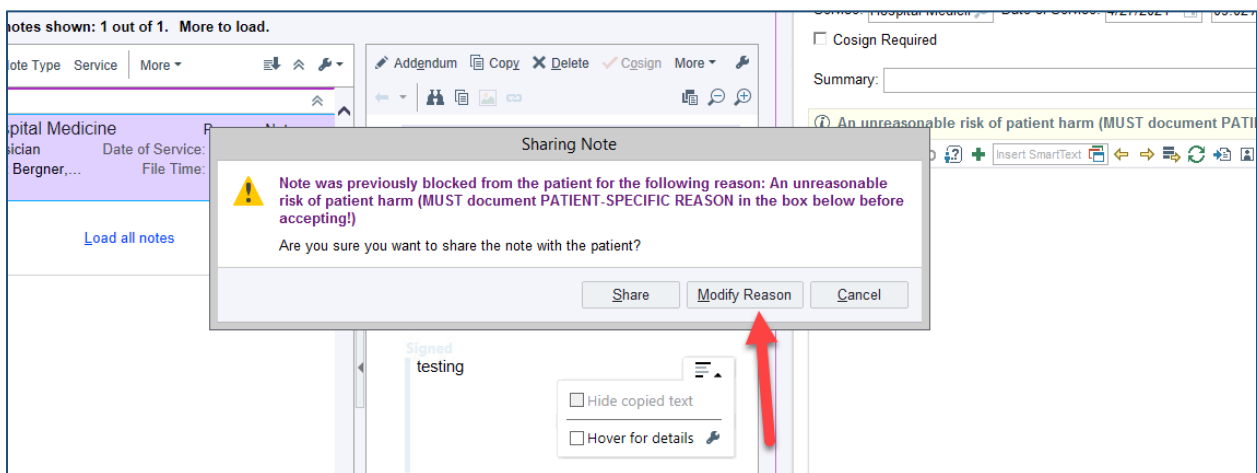
## 3. Select "Addendum."



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**.

Reason for Blocking

You must provide a patient-specific reason why this note should not be released to the patient's MyChart

- Patient request
- Patient proxy request
- An unreasonable risk of patient harm (MUST document PATIENT-SPECIFIC REASON in the box below before accepting!)

Comments

Enter patient specific reason here

Accept Cancel

If you have any questions or need guidance, please contact the Office of Healthcare Compliance and Privacy at x4177 or [compliance.officer@uchc.edu](mailto:compliance.officer@uchc.edu).