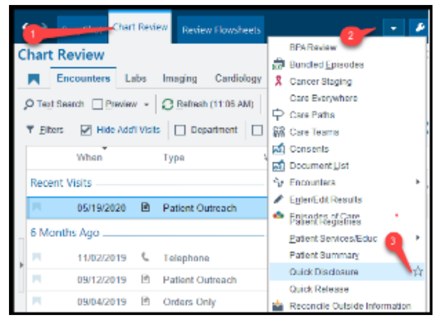
Quick Disclosure

Tip Sheet

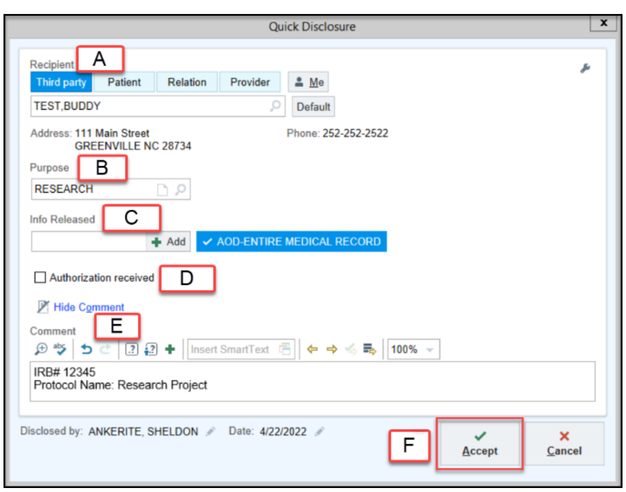
Creating a Quick Disclosure

Quick Disclosure is used to document and report who accessed a patient's chart, why the chart was accessed, and what information was reviewed. **Each time a chart is accessed for research without the patient's authorization (e.g. via an approved waiver of authorization), the individual accessing the record must create a Quick Disclosure. If a patient has signed a HIPAA authorization, Quick Disclosures are not required.**



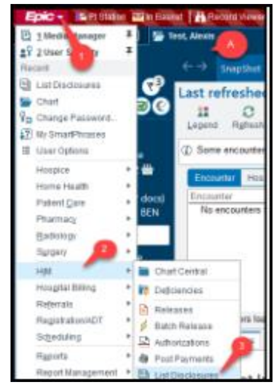
1. Click the **ChartReview** tab.
2. Click the **drop arrow**.
3. Scroll to *Quick Disclosure* and click the **star** beside **Quick Disclosure** to add has a shortcut. This ensures the user will not have to go to this each time they need to do a Quick Disclosure.
4. Click **Quick Disclosure** from the Activity Bar.

5. When the Quick Disclosure screen displays, complete each of the required fields as indicated by the red stop sign.
   A. In the *Recipient field*, click the **Third party** button. Then, type in the **name of the third party**. The name of the third party will appear. If changes need to be made to the address, hover over the address and click **the pencil** on the right-hand side.
   B. In the *Purpose field*, type **Research** and press **ENTER**.
   C. In the *Info Released field*, type **aod** and from the list that displays select **AOD-ENTIRE MEDICAL RECORD**.
   D. Click the **checkbox** for *Authorization Received* if the authorization was received.
   E. Click the **Add Comment link** to create a SmartPhrase in the Comment field to include the IRB# and Protocol Name.
   F. Click **Accept**.

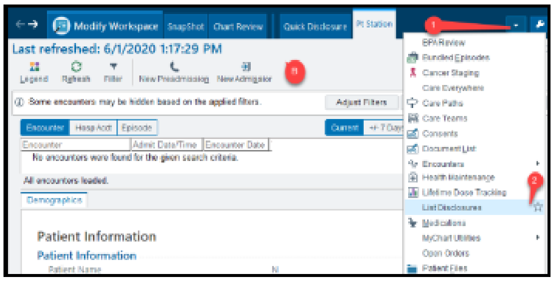


Editing a Quick Disclosure

Users have access to the Quick Disclosures that they have created; they do not have access to anyone else's Quick Disclosures.

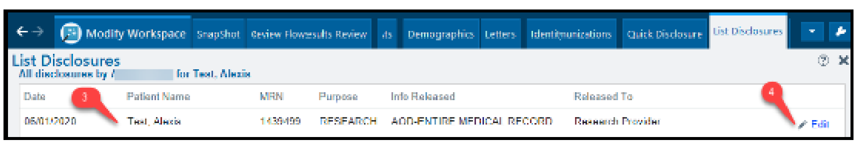


1. If edits need to be made to a Quick Disclosure that you have created, there are two ways to complete this process:
   - A.
     1. Click the **arrow** beside the Epic button.
     2. Click **HIM.**
     3. Click **List Disclosure**.
   - B.
     1. Click the **arrow** located beside the *Wrench*.
     2. Click the **star** beside *List Disclosures*.



2. Click the **List Disclosure** tab from the Activity bar.

3. A list of all Quick Disclosures that you created will display. Click the **Edit button** of the patient whose Quick Disclosure needs editing.



4. Complete all edits and corrections that need to be made and then click **Accept** to save the quick disclosure.