



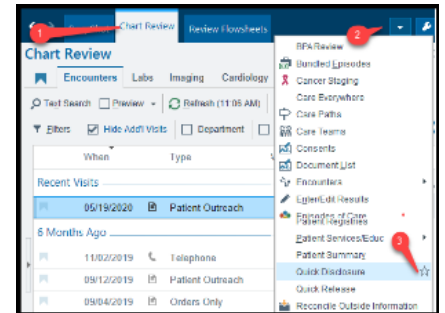
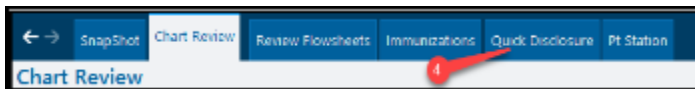
# Quick Disclosure

# 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**.

The screenshot shows the 'Quick Disclosure' form with the following fields and actions indicated by red boxes and letters:

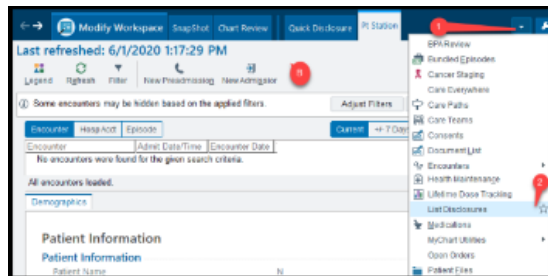
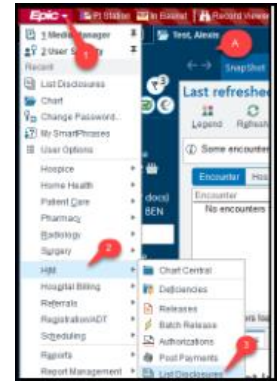
- A:** 'Third party' button in the Recipient section.
- B:** 'RESEARCH' text in the Purpose field.
- C:** 'Add' button in the Info Released section.
- D:** 'Authorization received' checkbox.
- E:** 'Add Comment' link in the Comment section.
- F:** 'Accept' button at the bottom right.

Other visible text in the form includes: Recipient: TEST.BUDDY, Address: 111 Main Street, GREENVILLE NC 28734, Phone: 252-252-2522, Info Released: AOD-ENTIRE MEDICAL RECORD, Comment: IRB# 12345, Protocol Name: Research Project, Disclosed by: ANKERITE, SHELDON, Date: 4/22/2022.

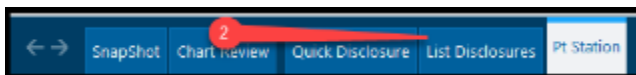
## Editing a Quick Disclosure

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

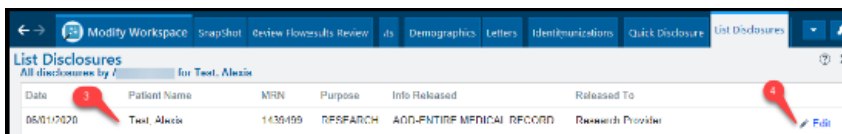
1. If edits need to be made to a Quick Disclosure that you have created, there are two ways to complete this process:
  - A.
    1. Click the **arrow** beside the Epic button.
    2. Click **HIM**.
    3. Click **List Disclosure**.
  - B.
    1. Click the **arrow** located beside the *Wrench*.
    2.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

Quick Disclosure

Recipient: **A** (Third party)

TEST.BUDDY

Address: 111 Main Street, GREENVILLE NC 28734

Purpose: **B** (RESEARCH)

Info Released: **C** (ADD-ENTIRE MEDICAL RECORD)

Authorization received: **D** (checkbox)

Comment: **E** (IRB# 12345, Protocol Name: Research Project)

Disclosed by: ANKERITE, SHELDON Date: 4/22/2022

**F** (Accept button)