UnityPoint Health Meriter | PARTNER OF UWHealth

Processes and Requirements for Accessing Epic for UW School of Medicine & Public Health Research and Quality Projects

General Information

- EpicCare Link is provisioned to UW School of Medicine & Public Health (SMPH) students and staff for research and quality improvement purposes only.
- Epic Hyperspace may only be granted to the following individuals:
  - Providers on Meriter's Medical Staff.
  - Medical students on rotation at Meriter.
  - Clinical research coordinators assisting with clinical trials.
- HIPAA's minimum necessary standard applies to research and quality improvement. This means you may only access the information related to the purpose of your project.
- Meriter uses the same Epic platform as the rest of UnityPoint Health (in Iowa and Illinois). You may not access patients from these other areas.
- Meriter also provides care to non-SMPH patients. You may not access the medical records of patients who do not have a treatment relationship with a SMPH provider except for the following reasons:
  - You are working on an IRB approved research study where you obtained the patient's authorization, or you were granted a Waiver of HIPAA Authorization.
  - You are collaborating with Meriter on a quality improvement project for the OB and/or NICU departments. See the Quality Improvement Projects section for more information.
- You may not access the record of any patient unrelated to your project. This includes, but is not limited to your:
  - Self
  - Family
  - Child
  - Coworker
  - Friend
  - Neighbor
- Meriter EpicCare Link activity will be audited. Inappropriate accesses will result in your access being revoked which may impact your ability to complete your project.
- Meriter EpicCare Link access will not be available to users whose formal affiliation with SMPH has terminated (i.e. students have graduated, or employees have terminated).

Requesting EpicCare Link Access

- SMPH's Site Administrators for EpicCare Link are Ryan Moze (ryan.moze@wisc.edu) and Jack Talaska (jack.talaska@wisc.edu).

- SMPH staff and students requesting EpicCare Link must complete the *UW School of Medicine & Public Health Request for EpicCare Link Access* form at least 1 month prior to the day they need access.
    - Contact one of the Site Administrators above to receive a copy of the form.
    - Complete the form to the best of your ability.
    - Obtain signature from Department Approver.
    - Return completed and approved form to Site Administrator for signature.
    - Once approved, Meriter will send the Information Security Agreement (ISA) to the requestor via email.
    - Once the requestor signs the ISA, they will receive an email with their access/login information.
- SMPH staff and students are required to complete the *UW School of Medicine & Public Health Request for EpicCare Link Access* form every time they are assigned a new project regardless of whether they currently have access.
- Please contact Ann Wieben at AWieben@uwhealth.org for assistance if you have difficulty navigating or finding specific information in EpicCare Link.

Research Projects

- When requesting protected health information (PHI) from a Meriter department, please supply your IRB approval letter for them to review. Only request the information listed in your study application.
- Disclosures from Meriter to SMPH for research purposes are required to be listed on an accounting of disclosures. SMPH users are responsible for tracking their accesses (access into patient records via Epic or review of PHI in a report from Meriter).
    - If you have Epic Hyperspace, please use the Quick Disclosure function to track your disclosures. See Quick Disclosure Tip Sheet for more information.
    - If you have EpicCare Link, please use UW's *Accounting for Disclosures Log – Research* found on the Office of Compliance page.
    - Please reach out to SMPH's HIPAA Privacy Officer for more information on what research studies/activities require an accounting.

Quality Improvement Projects

- HIPAA permits Meriter to disclose PHI for health care operations without an authorization in the following situations:
    - To another Covered Entity that participates with Meriter in an Organized Health Care Arrangement (OHCA) for any joint health care operations of the OHCA.
    - To another Covered Entity for their health care operations, if:
        - Each entity either has or had a relationship with the individual who is the subject of the PHI being requested;
        - The PHI pertains to the relationship; and

        - The disclosure is for a subset of health care operation activities, fraud and abuse detection, or compliance.
- Quality Improvement is considered a health care operation activity under the two situations above.
- Meriter and SMPH have an OHCA for joint OB and NICU services.
- OB/NICU Project Leaders Only – If you plan to access or request the PHI of patients who do not have a treatment relationship with SMPH, the project must be considered a joint health care operation of the OHCA. For a project to be considered a joint health care operation, you must collaborate and share your findings with Meriter leaders. Please contact Carla Griffin, Executive Director Pregnancy and Newborn Care Services, at Carla.Griffin@unitypoint.org and Sara Zerbel, Director of Performance Improvement, at Sara.Zerbel@unitypoint.org for more information.
- All Other Project Leaders – Meriter and SMPH do not have an OHCA for other service areas. You may only access or request the PHI of patients that have or have had a treatment relationship with SMPH.
- Please be clear when requesting PHI from a Meriter department whether your project is for joint health care operations of the OHCA.

Key Contacts for Questions or Concerns

Sarah Cable	Ryan Moze	Jack Talaska
Privacy Officer	HIPAA Privacy Coordinator	HIPAA Privacy Officer
UnityPoint Health – Meriter	SMPH	SMPH
608-417-5834	608-263-0196	608-265-4077
Sarah.Cable@unitypoint.org	ryan.moze@wisc.edu	jack.talaska@wisc.edu

Release of Information Using Quick Release or Quick Disclosure

UnityPoint Health

Quick Release: This is what you will use when you want to document the release and at the same time you can print the information.

Quick Disclosure: If you have already printed the document and you want to document this, you will use quick disclosure.

Patient Disclosure Report: This is a report which can be ran to see the quick releases & disclosures. It will also allow a user to edit both above.

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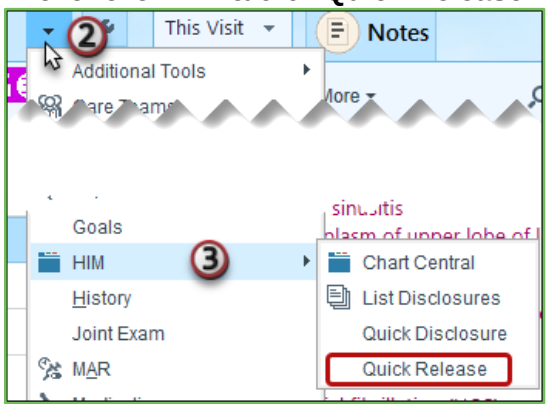
Quick Release

Clinical user workflow:

1. To document a Quick Release an encounter must be open. If you are not currently in an encounter, then create a Documentation encounter and use Record Request as the reason for documentation.
2. In the search field type, “Quick Release”.
3. Click Quick Release.
   Continue with step 4 below

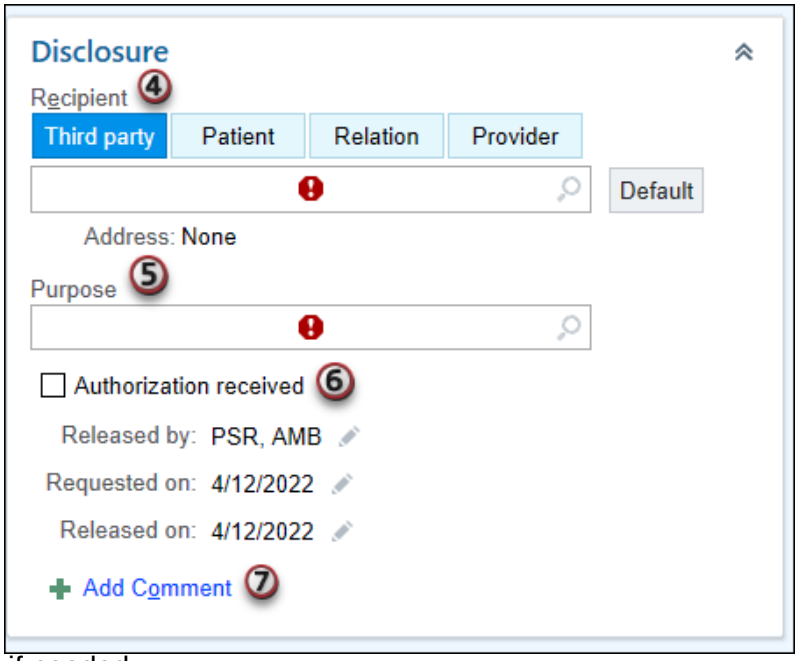
Clerical user workflow:

1. To complete and document a **Quick Release** open the chart.
2. Click the down arrow to the right of the activity tabs.
3. Hover over **HIM** & click **Quick Release**.



Workflow for Documenting the Quick Release

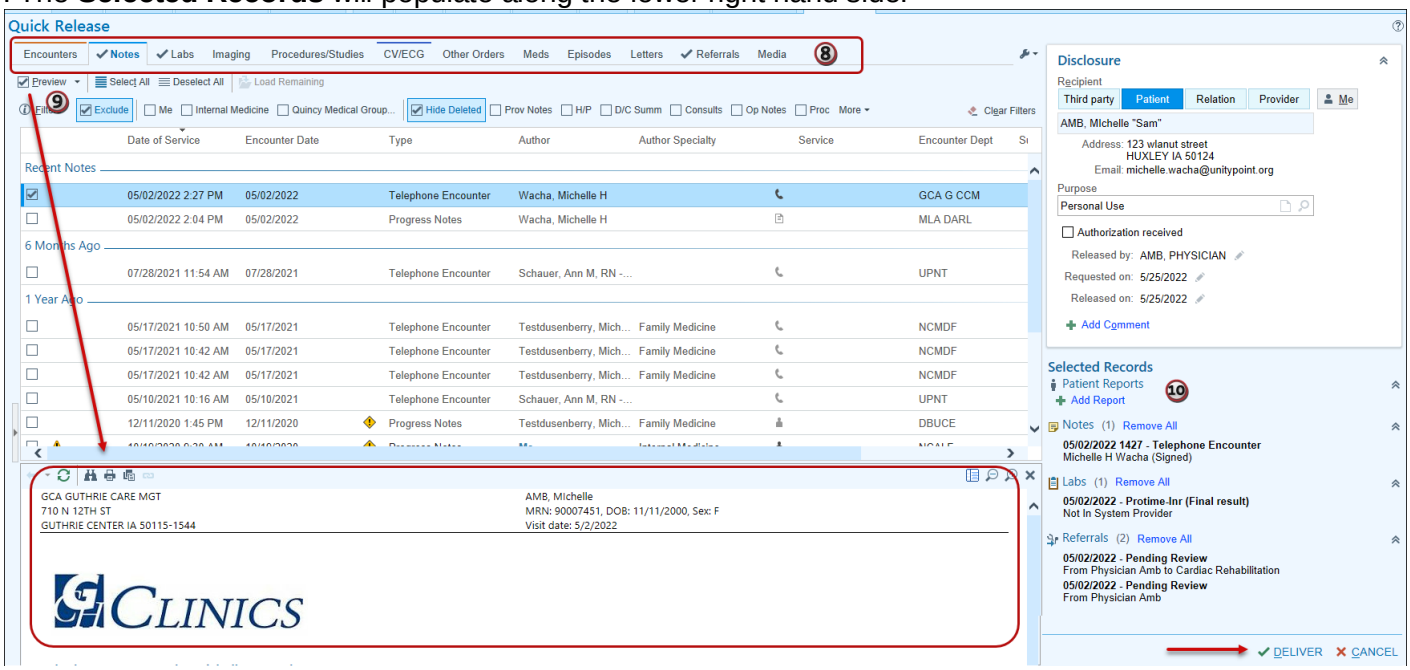
4. **Recipient**: Document whom the records were requested by (i.e. Patient, Provider, etc.).
   a. For **Third Party**, you can click **Default** to autofill the **QUICK DISCLOSURE REQUESTER** option and add a **Recipient name.**
   b. Or search & select **Requester not in system.**
   c. **If you cannot find a provider, users are able to use Provider Not in System** and hover over the address & click the ✎ to add details.
5. **Purpose:** Document the purpose or reason the records were released.
6. Place a checkmark next to authorization was received to document if needed.
7. **Comment:** Click **Add Comment** to add details. (i.e. Patient called and wanted a copy of their lab.)



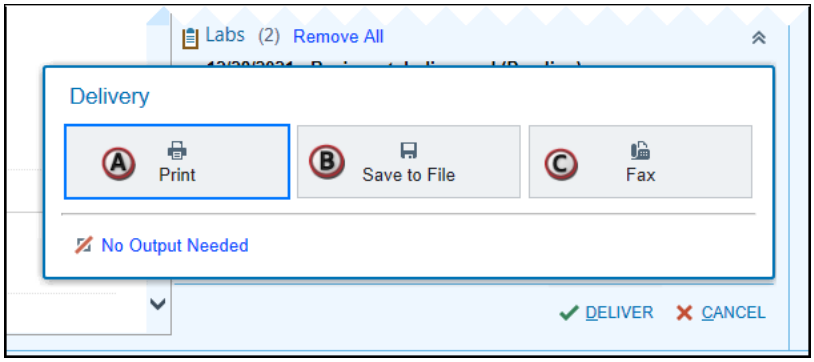
CLICK HERE to view the Requesting a New ROI Requester using Epic In Basket tipsheet is available

Release of Information Using Quick Release or Quick Disclosure

8. Using the Chart Review like tabs along the top of the left side of the workspace to select the various types of documents needed to be released by checking the box(s) next to the date. Below are a few examples of document types available for faxing/emailing:
    a. **Notes**
    b. **Labs**
    c. **Imaging**
9. If you want to preview a document, ensure the **Preview** checkbox is selected to view the report below.
10. The **Selected Records** will populate along the lower right hand side.



11. When you are finished click **Deliver**.
12. The **Delivery** window will open to make the selection.
13. Depending on the situation users have 3 options:
    A. **Print.**
    B. **Save to File.**
        i. The system defaulted to a Password to none and now has defaulted to **System** and can be changed to **None**.
        ii. **None** allows the file to saved and shared without a need for a password.
        iii. **Custom** and **System** both provide password protection, however you will need to be sure to share that password with the Recipient for them to be able to open the file.

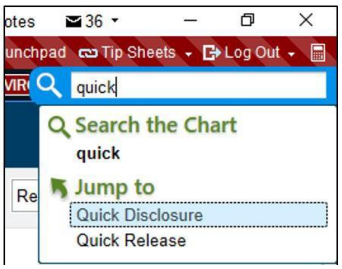


    C. Fax.
        i. The **Fax** number that is assigned to the **Provider/Third party** will autofill into the **Fax Number** field**.**
        ii. If this doesn't autofill, you are able to manually enter the fax number.
14. The records will print or be faxed directly out of Epic and the ROI has been recorded in Epic

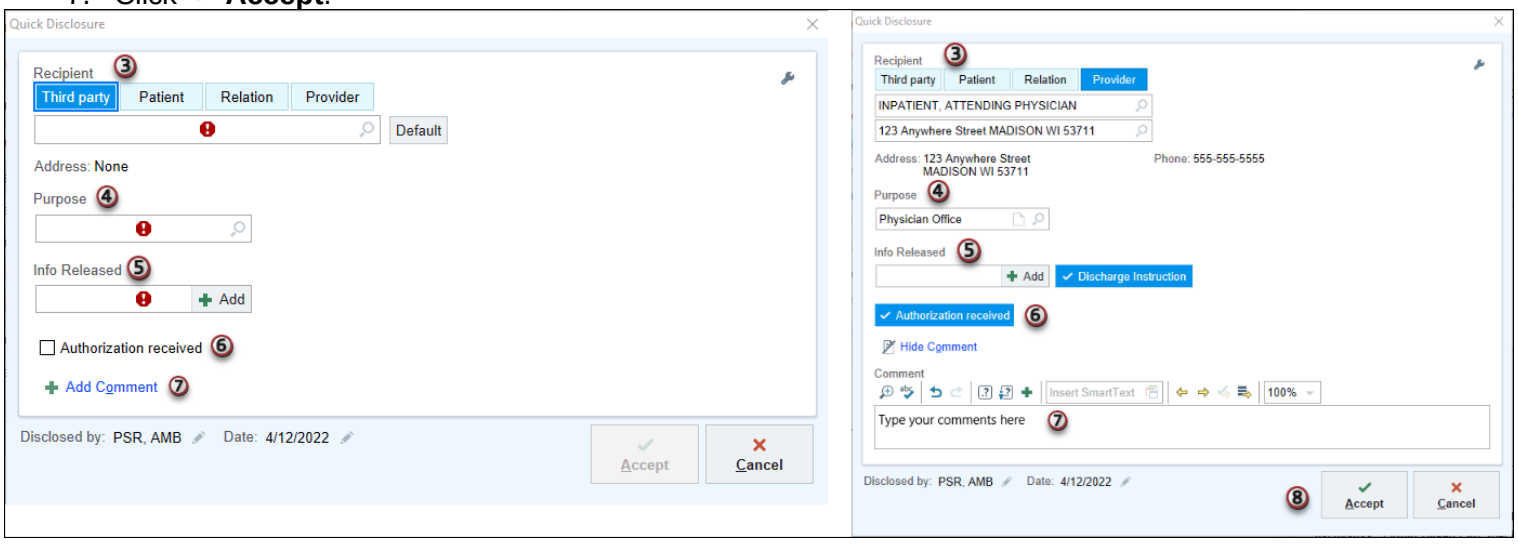
Quick Disclosure

Open the patient's chart

1. Search for Quick Disclosure.



2. Indicate the **Recipient** of whom the information was **Released to**, and if necessary, fill in the Name and Address fields.
    a. Requestor not listed: If you can't find the requester you can use "Requester not in system".
3. In the **Purpose** field, select the reason for the release.
4. In the **Info released** field, select the type of information that was released.
5. Indicate whether Authorization received (for example, verbal consent from the patient).
6. If necessary, click **Add Comment** to provide further explanation.
7. Click ✔ **Accept**.



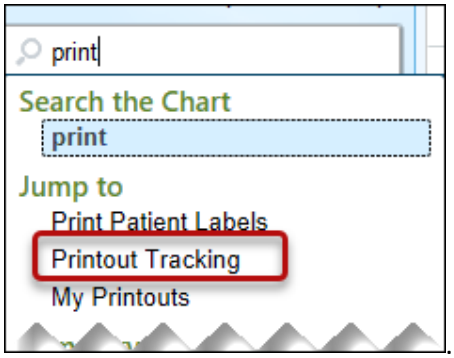
You can add **Quick Disclosure** as a favorite and add to the activity toolbar by clicking the ★.

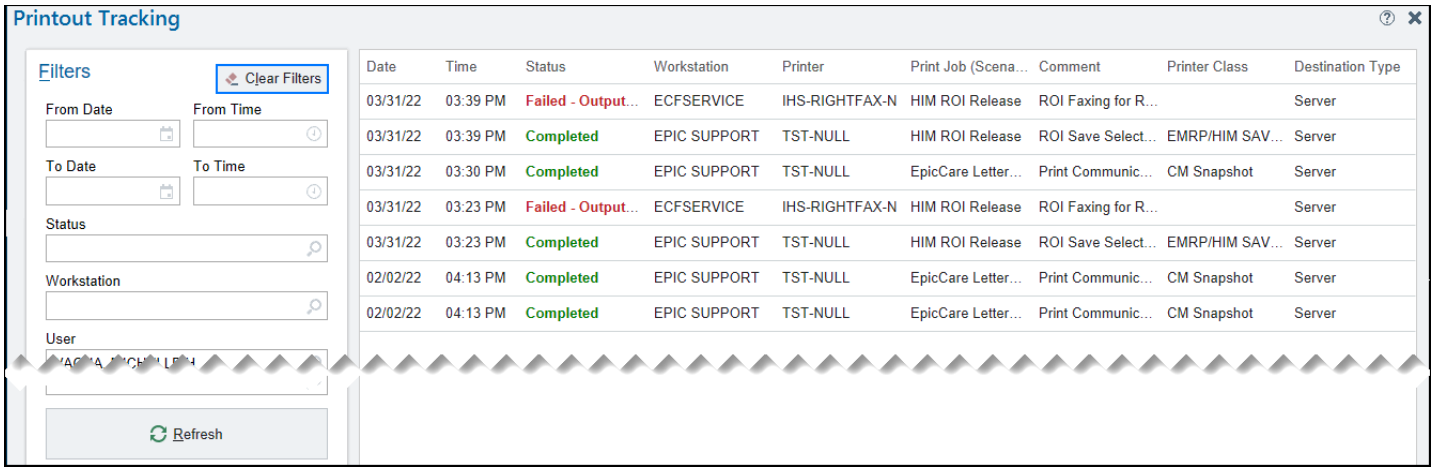
Tracking Patient Information

Clinical Staff Tracking of Printouts/Faxes

To see if the fax has been successful, the clinical staff will need to view their **Printout Tracking.**

1. Search for that activity from the **Storyboard** search field, type “print” to completion match and **Jump to Printout Tracking.**



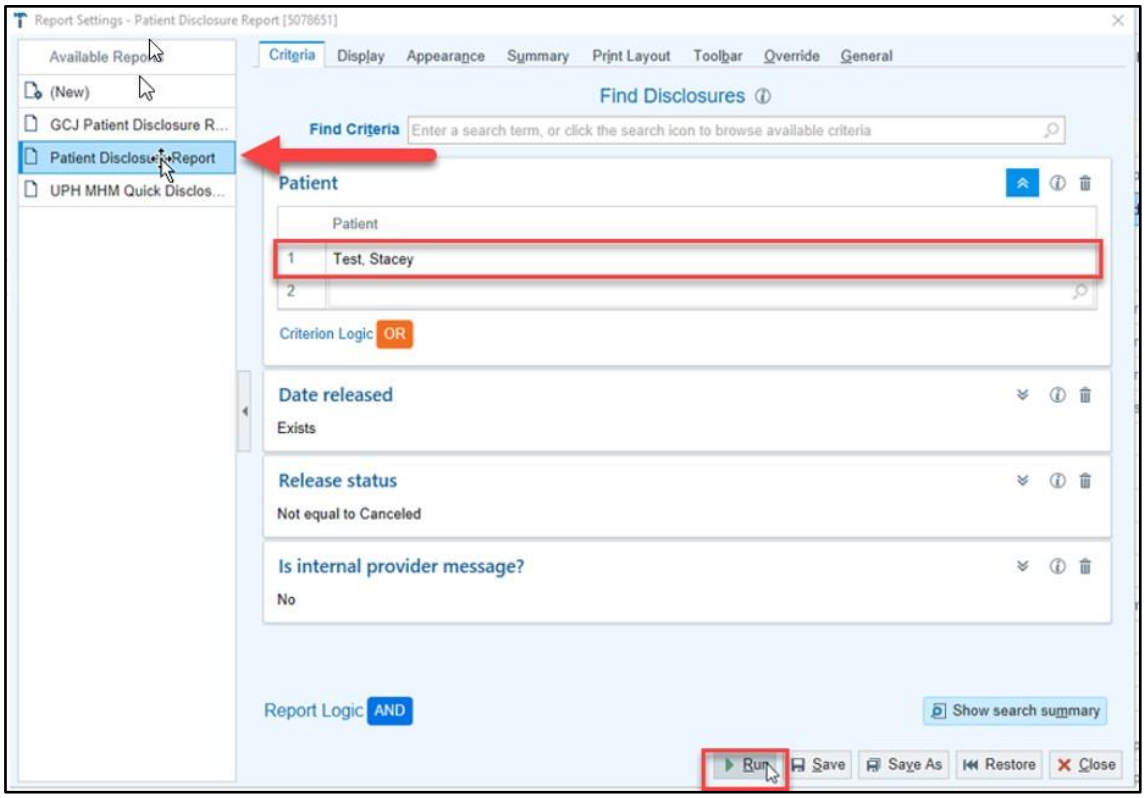


Clerical Staff Tracking using Patient Disclosure Report

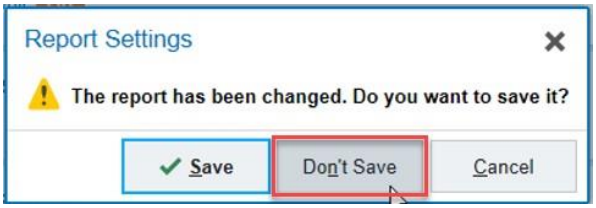
1. To run the Patient Disclosure Report, go to chart search and type in, “Patient Disclosure Report”.

Release of Information Using Quick Release or Quick Disclosure

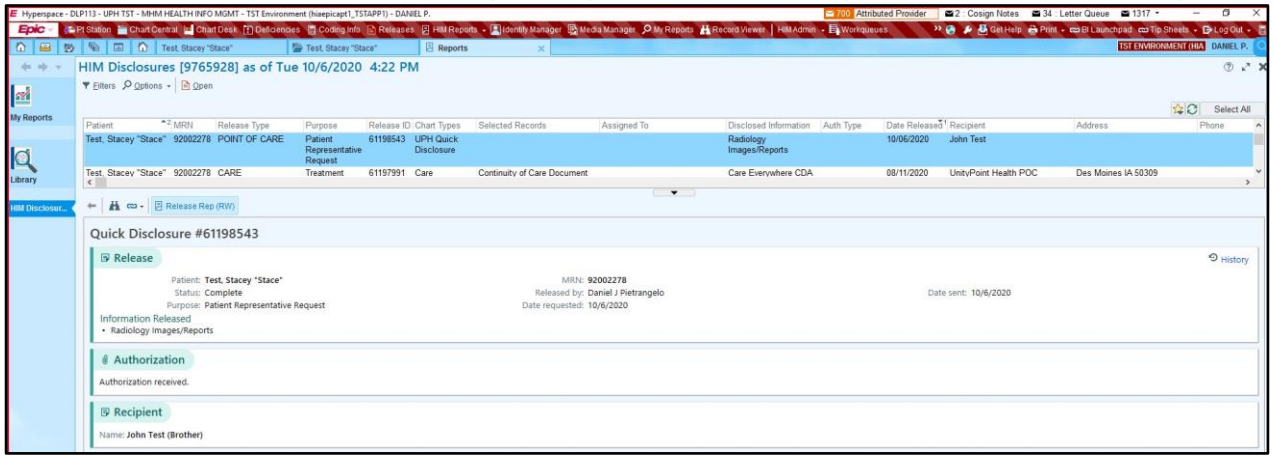
2. To select the report you want, you will choose Patient Disclosure Report, enter name of patient to look up and click Run.



3. A warning will appear asking if you want to Save the report setting. Click Don't Save.

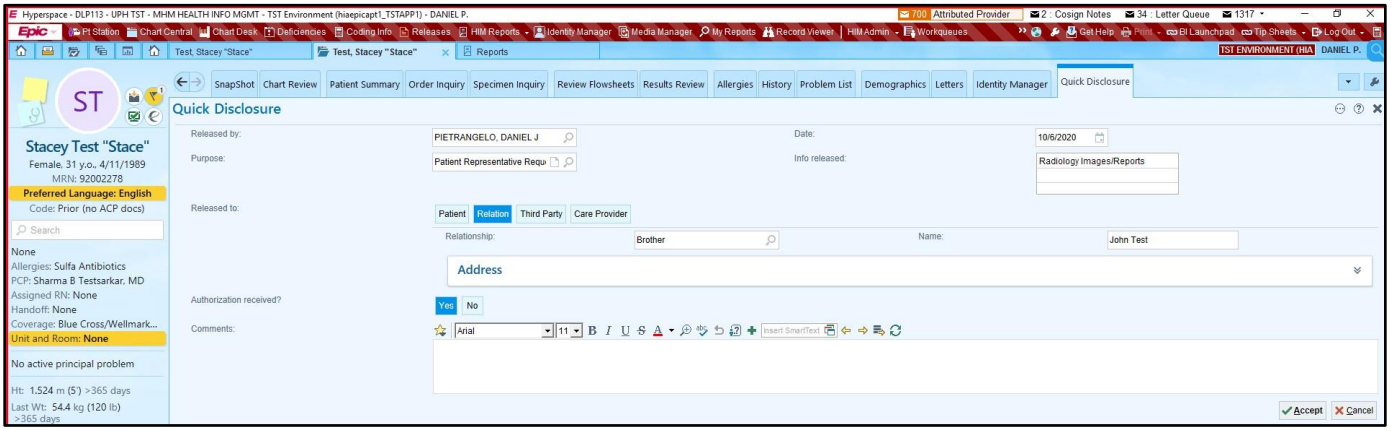


4. A Quick Disclosure was ran on this patient previously and it displayed as shown in the report below.

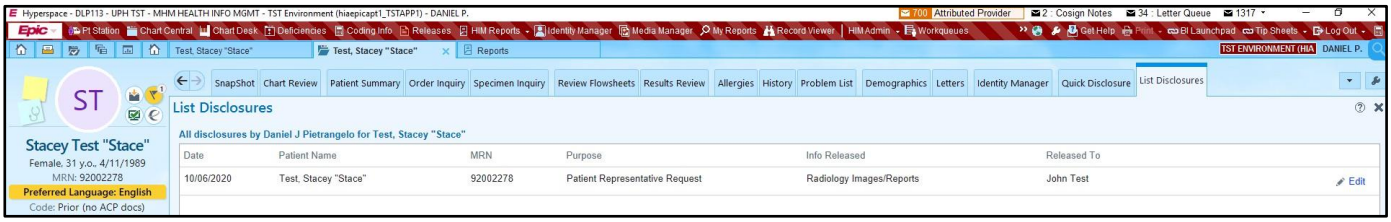


Release of Information Using Quick Release or Quick Disclosure

5. If you double click on a specific patient, you can see all the details in the Quick Disclosure window.



6. You also have an option form chart search to type in, “List Disclosures”. This will list any disclosures put in by the logged user



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