

New Notes Sharing Button & Epic SmartPhrase Effective Oct. 29 and Beyond

Oct. 12, 2020

Know

Earlier this year, the Office of the National Coordinator (ONC) for Health Information Technology announced the [final rule](#) of the 21st Century Cures Act. The new federal regulation acknowledges the important role patients play on their care teams by requiring healthcare providers to electronically release most clinical notes and test results to patients. There are limited and clear exceptions for notes that can be blocked.

Sutter Health will go live on OpenNotes and Results Release on Oct. 29. All healthcare providers will be affected. On Oct. 1, providers will see a new “Share w/ Patient” button in all shareable note types within the Sutter EHR. The button will be defaulted to share the note to MHO.

If a provider determines that a note meets an exception criteria to not be shared, they must un-select the “Share w/ Patient” button and document the reason for not sharing the note using the SmartPhrase **(.MYNOTESHIDE)** within the body of the note text. The **(.MYNOTESHIDE)** SmartPhrase contains a list of options that providers may select to document the reason for blocking a note.

These include: *Note is not being shared for the following reason:*

- *To prevent harm: release of this note would result in a harm to the life or physical safety of the patient or another person.*
- *To respect privacy: The patient or proxy has requested that this information not be shared.*
- *The information in this note is compiled solely for use in a civil, criminal, or administrative action/proceeding. Please consult with your local risk officer before selecting this option.*

Do

1. Become familiar with the [exceptions](#) for note release, as defined by the final rule of the Cures Act.

2. **All providers not currently using OpenNotes:**

For notes written 10/29 and beyond:

- Un-select the “Share w/ Patient” button that appears at the top of the note. Then use the new SmartPhrase **(.MYNOTESHIDE)** within the body of the note to document the exception criteria being used to block the note.

Please note the ability to block notes from a telephone encounter is not available at this time. We are evaluating inclusion in a future build.

3. **Providers currently using OpenNotes:**

For any notes created prior to 10/29:

- We will not be automatically releasing those notes at this time.

For notes written 10/29 and beyond:

- Un-select the “Share w/ Patient” button that appears at the top of the note. Then use the new SmartPhrase (**.MYNOTESHIDE**) within the body of the note to document the exception criteria being used to block the note.
4. For step-by-step workflow, visit the [SutterWiki page](#).
 5. The workflow for Emergency Department providers and staff is at this [SutterWiki page](#).

Share

Share this widely with all providers who document notes within the Sutter EHR. We’ve developed a [Provider FAQ](#) to answer many questions you might have about OpenNotes and Results Release. If you have questions, please email our project team at clinicians@sutterhealth.org and we’ll respond as quickly as possible.