

Flagging Confidential Patient Data

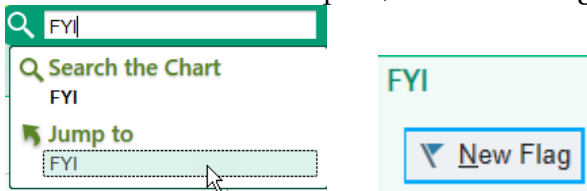
Using the Patient FYI Flag to Communicate Certificates of Confidentiality for Research Studies

Some research studies contain **certificates of confidentiality (CoC)** that prevent third parties from viewing details regarding a patient's participation in the study. To ensure confidentiality, a study team member who has an Epic role with access to scan (Ex: Research Coordinator with Scanning) needs to place an FYI flag on the patient's record. This flag, labeled **Release Restriction**, serves as a notice to the ROI team to avoid releasing study-specific information to any third party.

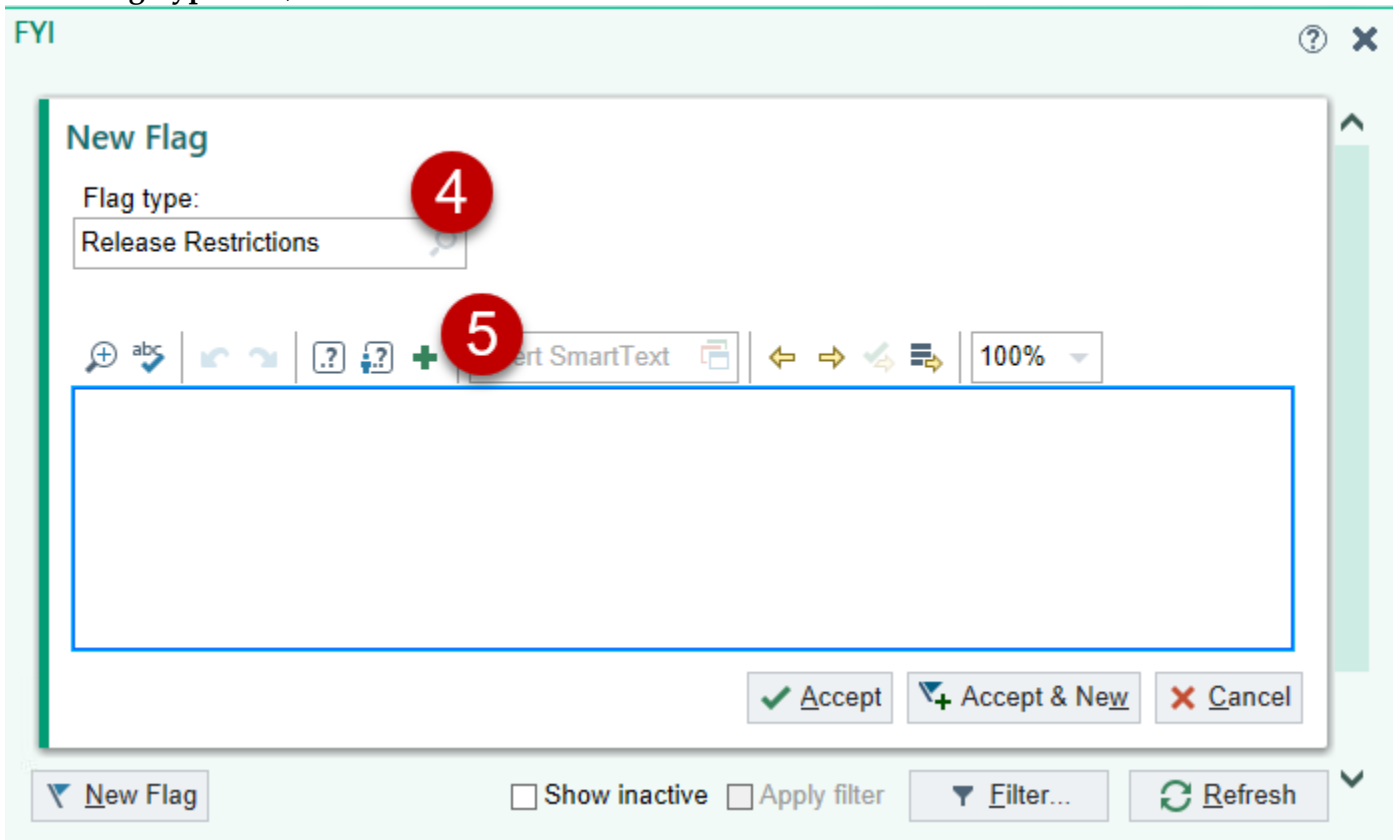


Try It Out

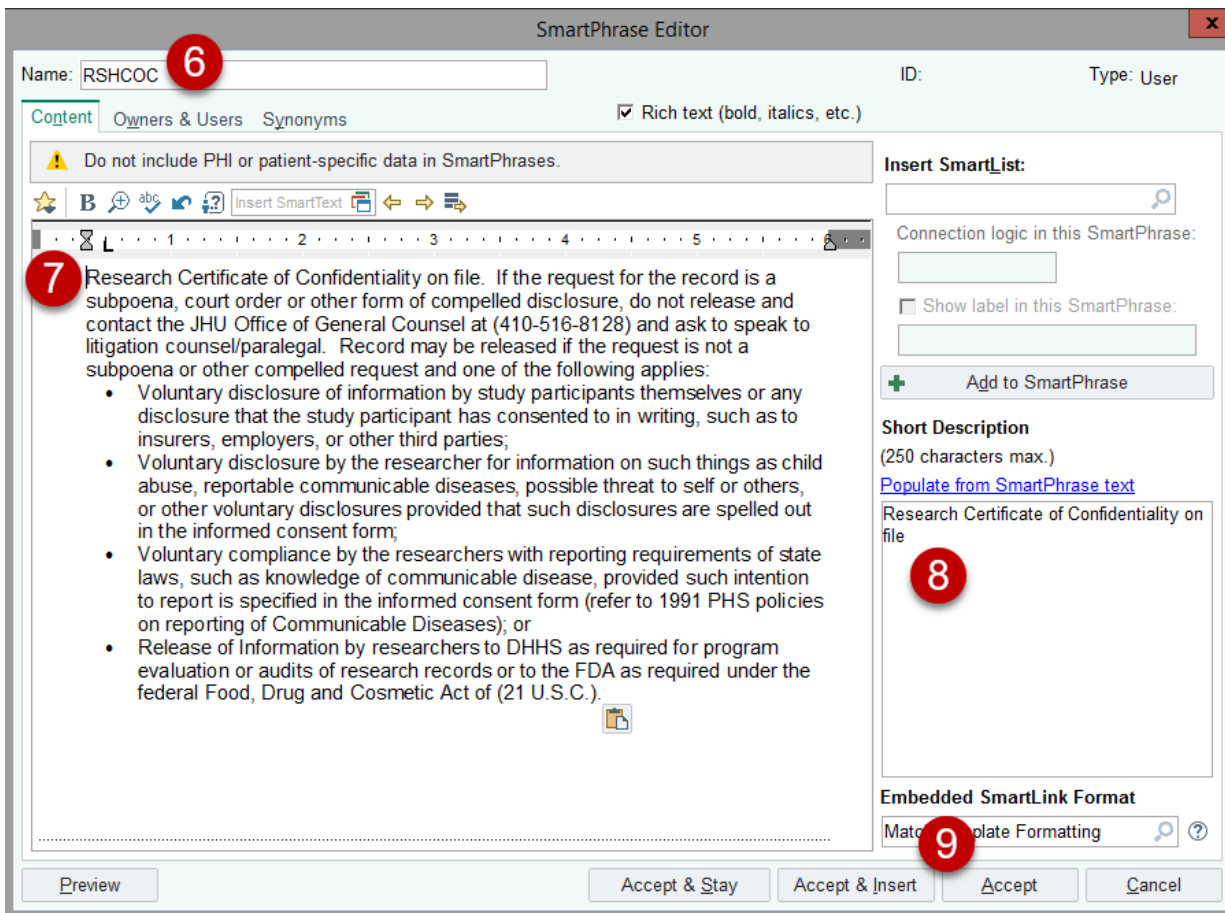
1. Click **Chart** from the main toolbar. Enter the information needed to locate the patient and open the patient's chart.
2. Type **FYI** into the **Chart Search** field within the storyboard and select **Jump to FYI**.
3. When the FYI window opens, click **New Flag** from the upper left corner.



4. In the **Flag Type** field, select **Release Restrictions**.



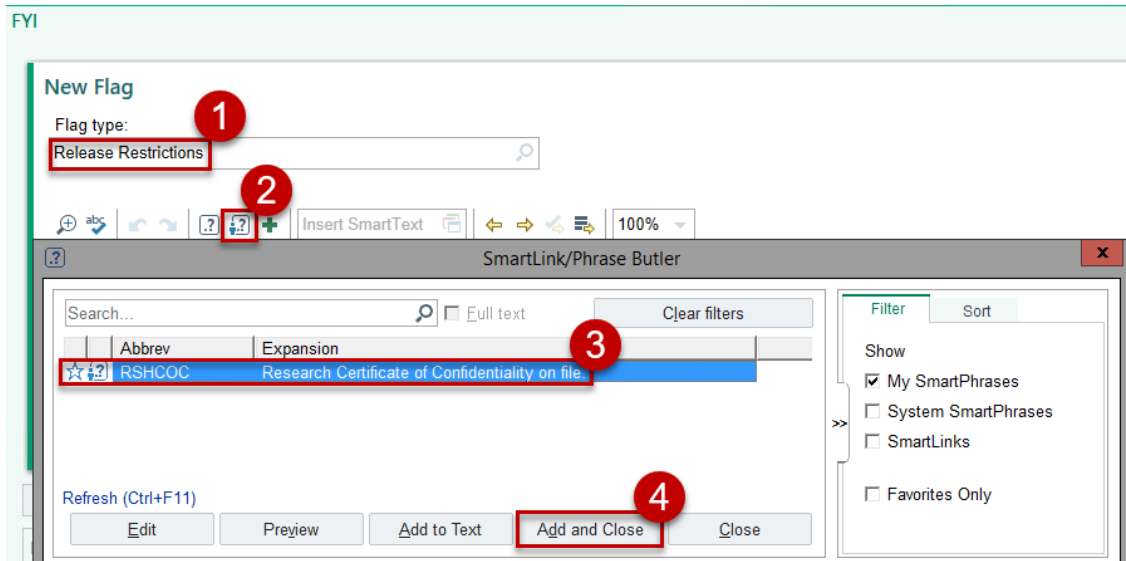
5. Click the **+** button to create a SmartPhrase.
 - Creating this SmartPhrase will make it simple to populate this exact text for future Release Restrictions FYIs.




6. Name the SmartPhrase. In this example, **RSHCOC** was used as an abbreviation for Research Certificate of Confidentiality.
7. Paste the following text into the free text field-
 Research Certificate of Confidentiality on file. If the request for the record is a subpoena, court order or other form of compelled disclosure, do not release and contact the JHU Office of General Counsel at (410-516-8128) and ask to speak to litigation counsel/paralegal. Record may be released if the request is not a subpoena or other compelled request and one of the following applies:
 - Voluntary disclosure of information by study participants themselves or any disclosure that the study participant has consented to in writing, such as to insurers, employers, or other third parties;
 - Voluntary disclosure by the researcher for information on such things as child abuse, reportable communicable diseases, possible threat to self or others, or other voluntary disclosures provided that such disclosures are spelled out in the informed consent form;
 - Voluntary compliance by the researchers with reporting requirements of state laws, such as knowledge of communicable disease, provided such intention to report is specified in the informed consent form (refer to 1991 PHS policies on reporting of Communicable Diseases); or
 - Release of Information by researchers to DHHS as required for program evaluation or audits of research records or to the FDA as required under the federal Food, Drug and Cosmetic Act of (21 U.S.C.).
8. Type "Research Certificate of Confidentiality on file" (or copy it from the pasted text) into the **Short Description** field.
9. Click **Accept and Insert**.
10. Click **Accept**.

Using a Previously Created SmartPhrase

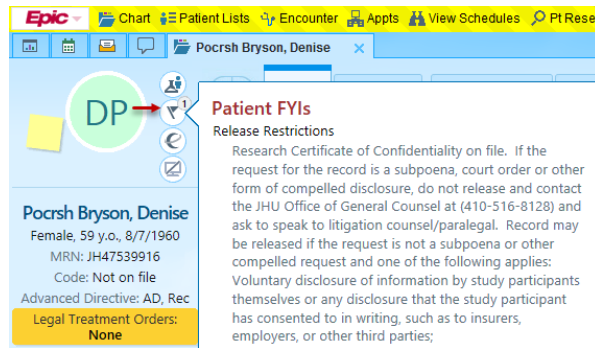
If you have followed the instructions above to create a SmartPhrase for the Release Restrictions Patient FYI, you can fill in the required text by adding the custom SmartPhrase.



1. After locating the **Patient FYI** from the **Patient Options** drop down on the right, select **Release Restrictions** in the **Flag Type** field.
2. Click the  button to view SmartPhrases you have created.
3. When the SmartLink/Phrase Butler window opens, click on the **RSHCOC** SmartPhrase to select it.
4. Click **Add and Close** to add your custom SmartPhrase.
5. Click **Accept**.

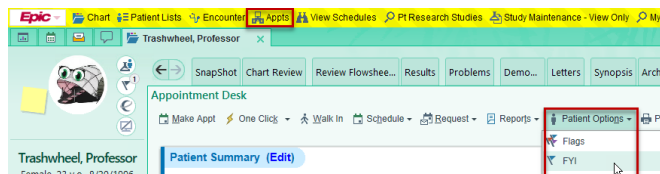
Viewing the Patient FYI

After adding the Release Restrictions Patient FYI flag to a patient, the icon of a flag will appear in the patient's storyboard once the patient workspace has been closed and refreshed. Hover over the flag icon to review the details of the Patient FYI.



You Can Also...

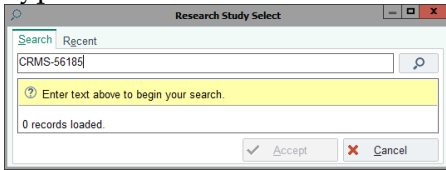
The FYI activity can also be accessed from the Appointment Desk (**Appt** button) and selecting **FYI** from the dropdown arrow next to the Patient Options button.



Review the Research Study Record for Certificate of Confidentiality

Information pertaining to a study's Certificate of Confidentiality originates on the eIRB website. Study teams should be able to view whether their study has a certificate of confidentiality on file by reviewing their study documentation in eIRB. The eIRB transmits this information from their site into CRMS and this information is then sent to Epic onto the Research Study record. To view this information from Hyperspace, Research Coordinators can follow the steps below.

1. Click **Study Maintenance - View Only** button from the main toolbar.
2. Type the CRMS number for the study in the format of "CRMS-12345" and press **Enter**.



- You can also search for the study by the study's name and clicking the magnifying glass, but accuracy is ensured when searching by the CRMS number.
3. When the study record opens, on the left, click **Report Groupers**.
 4. Click the "X" on the workspace to close the Research Admin activity.

Groupers	Value
Billing Calendar Status	
HB Fee Schedule by Sponsor Type	Non-Profit
CRBC Analyst	Analyst A
Encounter Linking Compliant?	Compliant

NCT Category:	<input type="text"/>
PRA Required?:	PRA Needed
Medicare Qualifying Study?:	Qualifying
Billing Rule Exclusions:	Standard of Care
Certificate of Confidentiality?:	Certificate of Confidentiality Present