

24 ACTION ITEMS PROCESS

INITIAL REQUEST VERIFICATION

1	Receive medical record request.	4	If authorization is invalid, notify requester.
2	Log request into ROI system.	5	If on prepay status, notify requester of amount due. Payment must be received before records can be sent out. Suggest credit card payment to expedite delivery.
3	Validate request by identifying patient and matching with facility; also investigate the HIPAA compliance of the patient authorization to release records.		

RETRIEVING PATIENT INFORMATION

6	If request is valid, pull the correct medical record number via EMR System and/or On Trac.	7	If onsite, retrieve medical record (paper and/or electronic).
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RELEASING INFORMATION

8	Confirm that medical record is complete.	11	Verify the request can be processed against available medical records.
9	Authenticate patient signature from EMR System or paper chart.	12	If the request cannot be processed, notify the requester.
10	Match the medical record request with the medical record.		

SENSITIVE INFORMATION

13	Locate requested information. Examine and review each page of the record for confidential and legally protected information.	14	If confidential or legally protected information cannot be released, redact information or request a Sensitive Authorization.
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FINAL STEP TO COMPLETION	
15 Identify documents for digital capture.	20 Prepare documents for distribution.
16 If working with a paper chart, disassemble and digitally capture the pages with the requested and authorized information, or designate pages within the electronic health record and package with the request.	21 Enter materials, including postage in system.
17 Verify patient identification on each page.	22 Record payments if received. If waiting on Prepayment, the request is filed on shelf until payment is received and it is moved to the 'Ready for Delivery' queue.
18 Review request and all medical record pages for accuracy.	23 Send requested documents to requester.
19 Reassemble paper chart if electronic chart was not used. Send paper chart back to storage.	24 Check 'Ready for Delivery' queue daily; complete final processing and send out medical records. Check 'Waiting on Information' queue weekly. If no response from requester, follow up with 'Waiting on Information' form as 2nd Notice.