

MOUNT ROGERS COMMUNITY SERVICES BOARD

TITLE: Protocol for the release of information from an individual's service record.

I. PURPOSE AND AUTHORITY

To provide a protocol for the management of the release of information from an individual's clinical record, the required documentation of the release and invoicing if applicable.

II. PROTOCOL

A. *Requests for Clinical Information*

Requests for information from an individual's service record must be submitted in writing. These requests may be submitted by the individual, a medical office, a behavioral health services provider, DRS, Social Security Administration, attorney's office, the court system or other entity.

Once the request is received we are required to respond within 15 days of receipt of a request as specified in the Code of Virginia >32.1-127.1:03 and Mount Rogers Community Services Board's HIPAA Procedure.

- 1) If records are being requested by someone other than the individual, designated staff will ensure that we have a completed release of information form signed and dated by the individual for which records are being requested.
- 2) Designated staff will assign individual to the Clerical Program and assign designated staff to employee (if not currently assigned).
- 3) Designated staff will add the Report Request to the Insurance tab as a payer.
- 4) Designated staff will complete Report Request service, which is a non-billable service, on the date the request was received.
 - a) Scan and attach written request to the service.
 - b) Request record from storage or off-site location if necessary.
- 5) Designated program staff will review the record either copying the requested information from the paper record or printing the information from the electronic record.
 - a) Designated staff will then complete a Record Release service in Credible documenting what specific information is to be sent and who requested the information.

- b) This is a multi-stage approval service requiring the service to be approved by a supervisor or site director before documentation is released to ensure the information is considered appropriate to release and would not cause harm to the individual.
 - c) The Record Release service will attach the applicable fee based on the requestor chosen.
- 6) The designated staff will give the office support staff on-site the documentation.
- a) Office support staff will approve the Record Release service to indicate the information has been mailed or delivered to the requestor.
 - b) Office support staff will lapse the Report Request payer in the insurance tab.
 - c) Unassign the individual from the Clerical Program
 - d) Unassign the employee from the individual (if applicable)
- 7) A fee of \$15 will be charged for the following requestors:
- Attorney
 - Social Security Administrative Office
 - Disability Determination
 - Department of Rehabilitative Services
 - Individual – staff should determine if they individual is requesting records for another healthcare provider. If so staff should discuss with individual the fee and let them know if the healthcare provider requests the record there will not be a fee.
- A fee will not be charged for the following requestors:
- Healthcare providers
 - Court Services