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## POLICY

This policy applies to the Johns Hopkins Health System (JHHS) Patient Financial Services (PFS) Department.

## PURPOSE

To establish the proper procedure for obtaining medical records when requested by third-party payers and tracking the request until the requestor has received it. Through this process, accurate records of requests and the fulfillment of those requests will be generated, providing a mechanism for monitoring and measuring the quality of fulfillment. The procedure will also give management the tools for identifying the types of requests that are difficult to fulfill. Through this knowledge, management can take corrective action to rectify problems and improve the receivable collection rate.

## PROCEDURE

Before submitting a request for medical records, **employees must first exhaust all other medical records systems** (e.g., EPR, HMED, eChart, EMR or IRMA). When payers request medical record copies, the responsible PFS Rep will utilize the "M/R Request Tracking" option in Keane or "Med Rec Requests" in Meditech. These systems prevent duplicate requests for the same record and provide a tracking mechanism and audit trail for requests.


### **JHH-Keane**

Medical records requested through Keane will appear on a report sent to the Medical Record Department at Johns Hopkins Hospital. The record is copied and forwarded to PFS. **This method of ordering records is to be used *only* for records that cannot be obtained through EPR (Electronic Patient Record), HMED or WebX (Web Extender).**

1. To create or update requests, from the main screen enter the number for **M/R Request Tracking** on the Control Line and hit <enter>.
2. At the **Tracking Menu**, enter the number for **Request Tracking** on the Control Line and hit <enter>.
3. At the **Request Tracking** screen, select the item number for your search method and hit <enter>. (Note: The **Patient Number** is the most efficient search method.)
4. At the prompt, enter the **Patient Number** followed by a dash (-), then hit <enter>.

If no existing request is found for this account, you will be prompted to add one. (The system defaults to Y [Yes].) Hit <enter>.

5. The next screen allows you to verify the patient's name and MR number.

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- >> For **Activity Code**, press **F6** to see the available options; for a new request, enter **NEW**
  - >> For **Remarks** (optional field), you may enter up to three lines of comments
  - >> For **Statute Date** (optional field), you may enter a statute date (formatted as MM/DD/YYYY)
  - >> For **Record Types**, use **F6** for a lookup of records to request (to scroll through the lookup list use **F5/F4**); select the item number(s) of the record(s) you need, and hit **F2** in the Control Line to post your request
6. When a request has been received and needs to be modified, log in following this same procedure and update the activity code accordingly.

#### **JHBMC-Meditech CS**

1. From the Meditech B/AR Main Desktop, select the **Med Rec Request** icon.
2. From the drop-down menu, select **Enter/Edit Request**.
3. At the **Correspondence Requests** screen:
  - >> For **Request #** enter "N" (for new)
  - >> **Status** will default to **Logged**
  - >> For **Type** enter "INS" (for insurance)
  - >> For **Date Needed** enter the date by which the medical record must be received
  - >> For **Requestor** hit **F9**, select your name (Name, Address, etc. will auto-fill)
  - >> For **Unit #** enter the patient's medical record number. (The system will search the database and ask for confirmation of the patient selected.)
  - >> For **Acct #** hit **F9**, select the date of service and this field will auto-fill
  - >> For **Requested Info** hit **F9** and select the medical record information you need
  - >> Under **Comments** enter any comment you want to be read by the MR Department regarding this request

User will auto-fill with your login name if you entered a comment

Date will auto-fill with the current date if you entered a comment

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>> Hit <enter> to see the **Correspondence** screen

4. At the **Correspondence** screen, click on the green check mark or enter **F12**.
5. At the **Correspondence Requests** screen, click on the green check mark or enter **F12**.
6. At the **Confirmation** box, select Yes to file your request.

## HCGH

Complete the Request for Medical Records form:

- Requested by
- Date
- Reason medical record requested
- Patient name
- Medical Record #
- Date of admission
- Date of Discharge
- Indicate if Entire chart or Portion


Fax the request to HCGH Health Information Systems. Give a copy of the fax to the designated individual from Support Services for tracking of fulfilled and unfulfilled requests.

The designated individual with access to Quickview can log on and see when the medical records have been scanned. Medical records will then be copied and given to the person who requested them.

## Medical Records Tracking Responsibilities & Procedures

Background: Beginning in February 2000, Patient Financial Services began utilizing the Medical Records Request System (MRRS)—a network-based application for entering medical record requests—and updating the system regarding received medical records when requests are fulfilled. The system is also used to create numerous reports which will allow management to evaluate the status of the requests.

1. Patient Financial Services (PFS) – Each PFS manager has employees with direct access to MRRS for Keane and Meditech; these employees are responsible for inputting medical record requests, including requests from other staff who do not have direct access to MRRS. This process enables the creation of a more complete and accurate picture of the patient visit, so that the medical records departments will have all the information they need to find the requested information. Finally, requests are printed and mailed to the appropriate medical records locations.

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- Medical Records Departments – The medical records departments will receive the requests, locate the records, and mail the records back to PFS. These locations will be connected to the MRRS system through their network, and the various medical records departments will be able to print requests directly from the system, as well as update the application regarding the status of the request. When this stage of development is complete, PFS will no longer mail the requests to the various medical records departments.

<b>Medical Records Departments</b>	
<b>Location</b>	<b>Address</b>
Hopkins Hospital	Phipps Bldg – Room B160
Bayview	AA Building
Psychiatric Records	Meyer 140 – First Floor
Pediatric Care	Children Center Room 2-121
Ophthalmology	Wilmer Eye Institute
Oncology	Oncology Dept 2-101
Physical Therapy	Meyer 1-130
Substance Abuse	911 North Broadway
East Baltimore Mental Health Partnership	1235 East Monument St., Lower Level 50

- Patient Financial Services – Once the various medical records departments have fulfilled a request, the information will be mailed to PFS. A designated individual from Support Services will update MRRS regarding the types of records received, thus allowing the system to keep track both of fulfilled and unfulfilled requests.


- PFS and Medical Records Departments – MRRS is used to create various periodic reports that measure the status of requests. Through the use of these reports (which have shared input from PFS and the medical records departments) a joint understanding of critical issues can be reached and the records request process can be improved.

**SPONSOR**


Senior Director, Patient Financial Services, JHHS


**REVIEW CYCLE**


Three (3) years

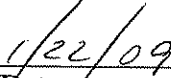
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**APPROVAL**

  
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 Senior Director, JHHS

  
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 Date

  
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 Director, PFS Systems Support, JHHS

  
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