



Medical Records Requests

Requests Handled by Medical Records Department

Fax or scan/email the following medical records requests to **859-878-1024** or **cathy.smith@stepworks.com**:

- legal
 - attorney requests and subpoenas
 - Child Protective Services (CPS)
 - Department of Corrections
 - probation and parole
 - anything from the courts
- Disability Determination Services
- Cabinet of Health and Family Services
- HEDIS reviews (requests from insurance companies with multiple patients)
- requests for certified or notarized records
- requests for a complete medical record (not including current patient requests)
- requests for the record to be emailed
- anything you're not sure about

Requests Handled by the Facility

Requests not listed above may be sent at the facility administrator's discretion. Please fulfill these requests as soon as possible: not to exceed **three** business days.



We must always have a signed release to send records. If in doubt, ask.

Take the following steps:

1. The facility administrator signs off on medical record requests. (Initial and date the top right-hand corner of the first page.)
 - a. Verify that the release is signed and dated by the patient.
 - b. Verify that the release mentions substance abuse (drug/alcohol) and/or mental/behavioral health records.
 - c. Verify that the request identifies (1) which records were requested and (2) the recipient.
2. Verify the patient's signature by checking another signed document.
3. Upload the release to the patient's chart.
4. Print the requested records.
 - a. Only send the requested records. Do not send the entire chart. Our medical records department should handle requests for an entire chart.
 - b. If labs are requested, the release must specifically refer to hepatitis and HIV records. If not, omit those labs and anything about those diagnoses.
5. Fax or mail the requested records according to the release. Our medical records department should handle requests for emailed records.
 - a. Include a copy of the release.
 - b. Always use a cover sheet.
6. Document the release in the chart using a staff note. Include a reference to the release, how it was sent, what was sent, and the recipient. Example staff note: *Per the signed release, faxed the MAR to Stacie at Intensive Health at 270-982-1284.*

Current Patient Requests

1. Ask the patient to complete a medical records request. Print from Stepworks University or stepworks.com: http://www.stepworks.com/wp-content/uploads/2022/02/ROI-Medical-Records-Release_SW-1.pdf
2. Upload the completed request to their chart.
3. Print the records. (Be sure to print documents separately.)
4. Document the release in the chart using a staff note. Example staff note: *Provided David a hardcopy of his complete medical record at discharge per his signed release.*