7 Time-Saving Tips to Help Your Firm Get Medical Records Faster

Written by George Bessenyei

When you need a medical record for a case, you need it fast. If it takes too long to get the information you need, you may be risking missed deadlines or expired statutes of limitations. In some cases, the ability to secure medical records in a timely manner can make or break your case.

If you're in the U.S., the good news is that the HITECH Act makes it cheaper and quicker to get HIPAA records. Plus, electronic records transfers, if managed securely, offer much faster access to the information you need for your case files.

However, obtaining medical records can still be tricky, and the process may take some work. You need to get your records fast, but you also need to consider the sensitivity of information being shared—and the consequences of making a mistake. Under HIPAA, there are serious consequences for failing to adequately protect any medical records in your care from hacking or sharing.

With the right system in place, and the right tools, retrieving medical records doesn't need to cause any headaches. Here are a few tips to help you get what you need without having to invest a lot of time.

1. File your record request correctly the first time.

Filing a medical record request might seem simple, but it's easier than you think to make a minor mistake that could leave you waiting longer than necessary. To ensure your request goes ahead smoothly, double check (or even triple check) that you've got the form you need, that everything has been filled out correctly, and that they're HIPAA compliant.

2. Send requests to the right location.

Large hospitals sometimes have multiple locations where medical request forms may be submitted. To make things more complicated, some hospitals also use third parties for this type of request. If you are not sure, call to check.

3. Ensure that the price is right.

Medical records retrievals can be costly, but there are a few things you can do to protect your firm and your clients.

First, make sure costs being charged for any records you request are in line with HIPAA.

HIPAA and HITECH prohibit medical records providers from charging unreasonable fees—entities can charge either costs calculated according to HIPAA or a flat fee of $6.50.

Depending on which state you're operating in, older state legislation may have allowed providers to charge hundreds of dollars for medical record retrieval. The federal rules under HIPAA and HITECH supersede state legislation, so if the cost of your record retrieval seems high, check that the medical records provider you're in contact with is following HIPAA.

4. Follow up on your requests.

By law, providers have 30 days from the date they receive your request to get a medical record back to you. Also the U.S. Department of Health and Human Services suggests that "individuals may reasonably expect a covered entity to be able to respond in a much faster timeframe when the covered entity is using health information technology in its day to day operations."

Still, some entities may take longer than expected to provide medical records. Mark your calendar to make sure you follow up at the right times. As the deadline approaches, send a gentle reminder.

Keep on top of the process, and medical records departments are much less likely to let something fall through the cracks.

5. Create a streamlined process.

As with other regular administrative processes such as billing and client intake, your firm's process for retrieving medical records should be consistent. This will save time and leave less room for error every step of the way.

For example, you may want to create a checklist so that lawyers and staff know to double-check the forms being submitted, the provider to whom they should make the request, and other key information.

6. Use technology to streamline the retrieval process.

Retrieving medical records can be tedious and time consuming, but getting all the details right from the start is crucial to getting records in time for your case. Even with the best processes, finding the right forms, delivering them to the right entity, keeping an eye on costs, and following up on requests can take more time than expected from you or your staff—but technology can help automate the process.

For example, YoCierge offers a medical records retrieval service that streamlines the process so that you can spend more time with your clients without worrying about getting records in time.

7. Use technology to find the information you need.

Obtaining medical records can be cumbersome, but sorting through them to find the information you need for your case can be time consuming as well. You may end up skimming hundreds of pages of records only to find that what you need is not in the set of records you requested. Then you have to start all over again.

Some service providers use artificial intelligence (AI) to sort and reorganize these vast troves of documents. YoCierge uses ReChron, which sorts the different records for a single patient into chronological order, providing you with a valuable timeline of events. Many service providers also index and summarize records so you can find specific information quickly.

These AI solutions cut down on the number of hours of tedious work poring through records to find relevant information.

From finding the correct records to knowing the process for obtaining them, outsourcing can give you a quicker way to achieve this. There are solutions which can speed the medical request process. Automation can also keep you in the loop about the status of your request. It may be quicker, safer, and less expensive to outsource some or all of your medical records requests.

Medical records are just one part of the large case files your firm will generate, but the laws regarding these records make them one of the most challenging parts of your digital paperwork. These tips should help you navigate the system while keeping your costs down. What you know about HIPAA can save you money, and your care in requesting records can save you time. That's a win all around!

Spend less time finding medical records, leave more time for clients

Retrieving medical records can be incredibly time consuming, but with the right processes and tools, you can rest easy knowing you'll get the information you need and that you can spend more time on what's most important—helping your clients.

Take extra care at the start when requesting medical records (or invest in a service to take care for you) and both your clients and your practice will reap the rewards.

Obtaining medical records is only the beginning, however. Keep your personal injury file organized with Clio's suite of features tailored for personal injury firms, which can help you:

- Manage medical records with ease
- Track and summarize damages
- Get settlement estimates at your fingertips

Let's help you remove operational barriers, drive cases forward efficiently, and deliver client-centered experiences with ease. Schedule a demo today to get a tour of Clio's Personal Injury Add-On.

YoCierge makes requesting medical records easy by integrating directly with Clio. See how it works.

Learn more

About George

George Bessenyei is the CEO and founder of YoCierge, a legal technology firm based in Wayne, Pennsylvania. YoCierge specializes in record retrieval and communication services for law firms. It was the first company to introduce machine learning and HIPAA e-Authorization into the medical record retrieval process. YoCierge integrates directly with Clio. Before founding YoCierge, George spent over 20 years advising law firms about technology both in the U.S. and Switzerland. He holds an MBA from Oxford and is also a Certified Information System Auditor and a Certified HIPAA Professional.

About Clio

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