

Processing a Patient Directive

Patient Directive Overview

A request made by the patient to have their records sent to a third-party is a Patient Directive. The patient may submit the request themselves, or a third-party may submit on the patient's behalf.

Records going to the patient will be billed at the OCR (HITECH) rate. Records going to a third-party will be billed at state rates.

HealthSource Fields

When logging the request into HealthSource, it is imperative that you select the correct:

- Request type
- Reason for Request
- Delivery method (+checkbox for electronic delivery if applicable)
- Special processing (for electronic device in fulfillment)

The next page lists a matrix by request initiator and displays the fields that must be entered into HealthSource Clarity in order for the request to deliver and bill correctly.

It is also important that you ensure the page counts appear for the correct format of the original record. For example: if you attached the file, the page totals will appear as all electronic. If part of the package you attached originated as paper or microfilm files, you must adjust the page count fields to accurately reflect the page types.



Important: The below logic will be followed in regard to eDelivery Requests:

1. Bill to and Ship to addresses must be the same. eDelivered requests are sent to our portal and the recipient is notified via email. If the Ship to information is different than the Bill to-this will cause the records to be printed and mailed.
2. If the recipient does not retrieve their request from the Portal within 14 days, the records will be printed and mailed.

Note About Electronic Delivery

Ciox Health does not email records directly to a requester. When you choose eDelivery and enter an email address, the records will be placed on our Ciox eDelivery portal and the email address will be notified their records are ready to be retrieved.

If the requester is already set up as default delivery method=Electronic, do not change it to eDelivery, the records will be delivered to their Ciox eDelivery Portal account.

Note: Do not select "Electronic" Delivery Method for any request unless the requester is already set in the database as their default delivery method.



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Quick Reference

Scenario	Request Type/Reason for Request
1. Patient asking for records to be sent to themselves	Patient/Patient Personal
2. Patient requesting their records be sent to their physician/family/etc. The invoice will go to the patient at OCR rates and the records shipped to the designated location.	Patient/Patient Transfer
3. Patient requesting for their records to be sent to an attorney/insurance company/copy service, we will bill the 3rd party and send the records to the 3rd party.	Standard/Patient Directive
4. Third Party (Attorney, Insurance, Copy Service) sends in directive on patient's behalf. Typically includes a cover letter from the third-party.	Standard/Patient Directive

When Billing (Requester/ Bill to):	Shipping Records To:	Requested Delivery Method:	Request Type:	Primary Reason for Request:	Ship To:	Delivery Method and/or Special Processing:
Third-Party= Attorney, Copy Service, Insurance	Third-Party	eDelivery	Standard	Patient Directive	Same as Bill To	<ul style="list-style-type: none"> Delivery Method: <i>eDelivery</i>, enter Email address in the Email field Select checkbox for "Requested Electronic Delivery". Note: if requester already has a Ciox eDelivery portal account (default delivery method=electronic), do not change to eDelivery. Keep it as Electronic.
Third-Party	Third-Party	Mail	Standard	Patient Directive	Same as Bill To	Mail
Third-Party	Third-Party	CD/DVD/USB	Standard	Patient Directive	Same as Bill To	<ul style="list-style-type: none"> Select <i>CD/ DVD/ Flash Drive</i> in the Delivery Method drop down. "Special Processing" field, choose Electronic Device. Leave number of devices blank Enter number of pages into the Medical Records Page Count field. (paper,electronic,micro)
Patient	Physician, family, etc. See scenario 2 above.	eDelivery	Patient	Patient Transfer	Enter the location specified by the patient as the Ship To	<ul style="list-style-type: none"> Delivery Method: <i>eDelivery</i>, enter Email address in the Email field. Select checkbox for "Requested Electronic Delivery".
Patient	Same as above	Mail	Patient	Patient Transfer	Same as above	Delivery Method: <i>Mail</i>
Patient	Same as above	CD/DVD/USB	Patient	Patient Transfer	Same as above	<ul style="list-style-type: none"> Select <i>CD/DVD/Flash Drive</i> in the Delivery Method drop down. "Special Processing" field, choose Electronic Device. Leave number of devices blank Enter number of pages into the Medical Records Page Count field. (paper,electronic,micro)
Patient	Themselves	Any	Patient	Patient Personal	Enter patient address for billing purposes.	<ul style="list-style-type: none"> Select the appropriate delivery method: mail, e-delivery (enter email address), CD/ DVD/Flash Drive. If CD/DVD/Flash drive chosen, in "Special Processing" field, choose Electronic Device. If either eDelivery or Electronic Device is Delivery Method, select checkbox for "Requested Electronic Delivery".

For any questions regarding pricing, please contact fieldsupport@cioxhealth.com

