Release of Information - ChartSwap Integration

Release of Information

This article specifically covers our **Release of Information** app and how we integrate with ChartSwap. If you don't know what our **Release of Information** app is, you can learn more in our Release of Information Overview article.

ChartSwap Integration

Updox has partnered with ChartSwap to help simplify the exchange of patient records between healthcare providers and requestors (law firms, record retrieval organizations, insurance companies, etc). ChartSwap does not generate any record requests themselves; rather, they enable the requestors on their platform to submit their requests electronically and allow providers to digitally fulfill the requested records.

By joining the ChartSwap network, Updox has extended its **Release of Information** application to allow requestors to search for your organization and send record requests electronically directly into your **Release of Information** app. You can use the **Release of Information** app to collect and organize the requested documents, just like you can with record requests you create, and when you have everything pulled together, you can quickly return the records to the requestor with a single click.

With the ChartSwap integration, you also have the option to set and collect custodian fees related to these requests.

If you would prefer not to receive requests via the ChartSwap integration, please contact our Support department and we can opt your organization out of the integration.

Who is ChartSwap?

ChartSwap is an industry-leading medical record request and retrieval company that has been in business since 2012. They have been especially successful with legal requestors (lawyers, record vendors, insurers, etc) and they currently have over 95% of the legal requestors in the country on their platform. You can read more about them on their website: https://www.chartswap.com/about/.

Why did Updox partner with ChartSwap?

Currently, medical record requests that originate from requestors on the ChartSwap network come into your office via fax or mail. This integration allows those requests to come in electronically to your Inbox and **Release of Information** application instead, saving you money on faxing and time opening mail. The integration also makes it easier for you to request custodian fees for any records you send back to the requestor.

Does Updox automatically send any patient data out?

No, what you send out remains entirely in your control. You will still use the **Release of Information** application to gather the documentation and nothing is returned to the requestor unless and until you decide.

What happens if/when I receive a record request via the ChartSwap integration?

You will see a new request in your **Release of Information** dashboard. We also place a message into your Inbox every time you receive a new request for records from the ChartSwap platform, just to make sure you are aware of it. You can safely archive or delete these messages in the Inbox without affecting the request in the **Release of Information** app. The Inbox message is simply a way to notify you there's a new request in your **Release of Information** app.
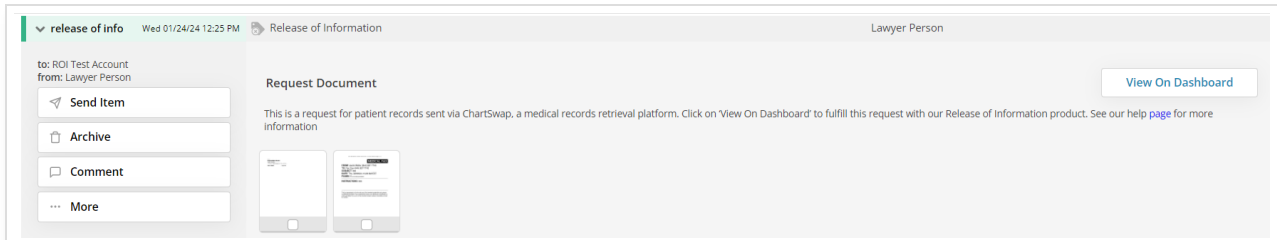
To fulfill these requests, you can click on the *View on Dashboard* button in the message or navigate to the **Release of Information** app thru the Home menu. You will then be able to process the request and electronically send it back to the requestor via the ChartSwap interface.

How do I collect custodian fees for the records I return?

Updox customers can choose whether or not they want to receive custodian fees for ChartSwap requests they fulfill. If you choose to get paid for the request, select the *Yes* option in the *Compile and Send* pop up screen and enter the number of billable pages in the text area.

If this is your first time requesting a custodian fee for records requested via the ChartSwap integration, ChartSwap will require additional information in order to setup the payment process. ChartSwap will reach out to you when they receive that first request and you will then need to work with them to establish those payment settings, which will only apply to future requests. Your first records submitted will be released to the requestor with no custodian fees collected but will start the process to collect payment for subsequent requests.

Please note that if ChartSwap is unable to reach you after 3 attempts, you will be responsible for collecting any applicable fees. You can always reach out to ChartSwap at providers@chartswap.com to resume the process, if necessary.

If updates to payment settings are needed *after* they are established, please reach out to ChartSwap at the same email address (providers@chartswap.com).

Here is the type of information ChartSwap will be looking for:

1. What you charge for medical records (base fees or per page fees).
2. A copy of your organization's W9.
3. ACH/banking information so payment can be made to you electronically.

Again, if you have any questions or concerns, you can always reach out to ChartSwap at providers@chartswap.com to start a conversation or find out more.

Do I process ChartSwap requests differently than standard requests?

While the general process of fulfilling a request is similar, there are a few differences when you are fulfilling a request that you received via ChartSwap integration:

1. Requests originating via the ChartSwap platform will automatically appear in your **Release of Information** app. You do not need to create them.

2. Once you've clicked *Compile and Send* and confirmed the information in the pop up, you will no longer be able to add, reorder, or delete collected documents.

3. If you accidentally send an incorrect record back to a requestor (using the *Compile and Send* button), you will need to reach out to ChartSwap at providers@chartswap.com and work with them to have the records pulled.

4. The *Send as Fax* option (which is available on standard records requests for accounts with faxing) is disabled for requests which originate from requestors on the ChartSwap platform. You can still download a PDF of your documents if you like.

5. Only the requestor can cancel requests received via the ChartSwap platform, but you can still decline a request if it's not applicable (e.g., the patient was never seen at your practice) or it's incomplete (e.g., there is insufficient authorization attached to the request).

What do the statuses mean?

There are 8 statuses you'll see as you interact with the **Release of Information** application.
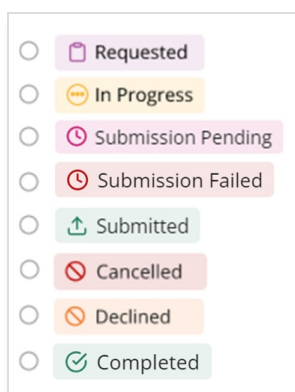
Here is the typical lifecycle of a request:

1. Every new Release of Information request received from the ChartSwap platform begins in the **Requested** status.
2. As soon as the first collected document is added to the request (by uploading or printing), the status is automatically moved to **In Progress**.
3. From here, you can keep uploading or printing in documents until you have gathered all the necessary information.
4. Once you have everything you need, you use the *Compile and Send* button to take all of your collected documents, combine them into a single document, and electronically send them back to the requestor via the ChartSwap platform; the status is automatically moved to **Submission Pending** at this point.
5. When the compiled document has been successfully delivered to the ChartSwap interface, the status is automatically moved to **Submitted**.
   1. This compiled document is now available for the requestor to download in the ChartSwap portal

(where they submitted the request). The requestor will be asked to pay a download fee before they can access the files. If the requestor does not want to pay the download fees, they will be directed to contact your office to receive the records via an alternative method.

6. When the requestor downloads the compiled records from the ChartSwap interface, the request's status will be automatically change to **Completed**.

Declined Status

If you receive a request that you cannot (or do not want to) fulfill, you can choose to decline the request. Using the *Update Status* button, you can manually change the status to **Declined**. The system will prompt you for a reason before changing the status. The requestor will be notified of the changed status and the decline reason.

Please note that requests in the **Declined** state cannot be reopened. If you decline a request because it is incomplete or invalid in some way and the requestor fixes the request and resubmits it, that will be a brand new request on the **Release of Information** app, we will not reopen the previous declined request.

Cancelled Status

If the requestor decides they no longer needs the information (before you return it), they have the ability to cancel the request and provide a reason via the ChartSwap platform. The request's status in the Release of Information Dashboard will automatically change to **Cancelled** and you will be able to see the reason why. Updox users cannot cancel a request received via the ChartSwap platform, only the requestor can cancel.

Submission Failed Status

If we are unable to return the records to the requestor, the request's status will be automatically moved to **Submission Failed**. In this status, you can try to re-send the document by using the *Compile and Send* button again. If needed, you can also choose to change the status to **Declined**.

Allowed Status Changes

The contents of the *Update Status* drop-down depend on the current status of the request – we only show you the valid statuses you can change to. Here is the list of valid manual status changes:

- **Requested** → you can change the status to **Declined**
- **In Progress** → you can change the status to **Declined**
- **Submission Failed** → you can change the status to **Declined**