

WEISMAN CHILDREN'S REHABILITATION HOSPITAL (WCRH)

ADMINISTRATIVE MANUAL

SUBJECT: MEDICAL RECORD ONSITE REVIEW

NO: AM 2.02

EFFECTIVE DATE: 06/19/2024
REVIEWED / REVISED:

PAGE: 1 OF 1

PURPOSE:

To minimize inconvenience and disruption within the HIM Department during onsite medical record review audit.

POLICY:

To ensure the safety and security of our patients protected health information and technical safeguards, while providing ease of access with limited disruption to day to day HIM job duties.

PROCEDURE:

1. All onsite medical record review audits must be made in written form to the HIM Department. The request must be on their company letter head or email. The request must include the patient(s) name, date of birth, date of visit, information needed within the medical record, the purpose for the review and if they will need access to a printer. Under no circumstances are external devices permitted.
2. Depending on the level of review, notice must be given within 3-5 business days in advance in order to prepare appropriate accommodations and access security for auditor.
3. The HIM Director will work with the Senior EHR Analyst to assign the auditor user name and password for the auditor as well as populate the requesting information into their work queue. Print functions will be limited to those who require printing PHI.
4. IT will assign auditor network username and password. This sign on will be reused for our review auditors. A log will be kept for users and dates used.
5. The HIM Director will contact the review auditor and schedule the onsite review. The HIM Director must be present onsite during the onsite review. The auditor's analysis of our operation and/or EHR may require assistance at various levels. The auditor will be reminded to have their company ID at the time of review. If ID is not available, the auditor will be denied access and onsite review will be

rescheduled for a later date. Administration will be notified in advance for proper documentation of occupancy in the event of an emergency.

6. Provide a temporary work space for the auditor in the HIM Department area within reasonable proximity to the printer if needed.
7. The day of the onsite review/audit the HIM director will make a copy of the auditor's company ID, document username/passwords assigned along with copy of the initial request for review. This information will be saved on the HIM Share drive. The auditor will be shown where the bathroom is located as well as stairway in the event of an emergency.
8. If in the event the review must be cancelled due to unforeseen circumstances (system issues and etc.) the HIM Director will notify the review auditor as soon as possible. If issues arise during review audit accommodations will be made to deliver information needed via secure email or reschedule onsite review audit. Under no circumstances is offsite access permitted to our EHR for non-employee users.
9. Upon completion of the onsite review audit, the HIM Director will contact the Senior EHR Analyst and reset the password provided.

Administrator