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| After Receiving a Medical Records Request (Audit) Take the Following Steps | | | |
| Successful Audits Depends on Preparation | Yes | No | Notes |
| Did you carefully read the letter? |  |  |  |
| Start a log to track your interaction with payer during the process. |  |  |  |
| Verify the deadline date for when the medical records must be received by the insurer and provide the records by that date. |  |  |  |
| Gather and review all the requested medical records with your staff. |  |  |  |
| Contact a State/National organization if needed |  |  |  |
| Notify your staff or billing company about the audit request. |  |  |  |
| If need have an external record review perform |  |  |  |
| Copy and only provide records/documentations that were requested |  |  |  |
| Include any supporting materials. Example: abbreviations, national coding policy, CPT reference, etc. (Make sure the summary and/or notes are legible and dated.) |  |  |  |
| Keep a detailed copy of the medical records that were sent to the health plan. |  |  |  |