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**Patient Records**

I. Introduction

1. Overview of why record documentation, secure storage and the ability to copy patient records is very important.

II. Discussion of procedures

1. Documentation to justify billing code
2. Pennsylvania & New Jersey state regulations

III. Contact Len Prescription

1. Required documentation
2. Pennsylvania & Maryland state regulations
3. State & Federal penalties

IV. Record retention

1. Record retention time frames
	1. Varies by state stature, Medicare, Medicare Advantage and for those patients under 18- year old patient
	2. A record of the findings concerning the health status of a patient
		1. Transfer of care
		2. Governmental agencies, payors and / or patients for litigation
		3. Secure and accessible location
		4. Important dates to know

V. Fees to copy patient records

1. Print & electronic reproduction fees and postage fees.
2. Pertaining to Delaware, Maryland, Pennsylvania & New Jersey
3. Contrary view on how this may violate HIPPA

VI. Leaving a practice

1. $800,000 OCR penalty
2. What not to do to avoid such a penalty.
	1. Case example

VII. Importance of secure disposal of paper and electronic records

1. CMS guidance and where to find this guidance
2. Criteria for different items that contain personal health information (PHI).
	1. Example given
	2. CMS rules on paper and electronic records

VIII. EHR errors in documentation and Litigation

1. Examples discussed

IX. EHR billing and civil and criminal penalties.

1. Specific examples of how to avoid this

X. Telemedicine

1. New terminology
2. Prior authorization
3. Confidentiality
4. Recording and transmitting data obtained from this telemedicine and specific Delaware regulations

XI. What to do if you receive a “Litigation Hold Notice Letter?”

1. Example given.
2. Tampering

XII. Question & Answer session.

1. This is an Optometric educational seminar and this discussion will be limited to this area.

This power point presentation should last 50 minutes.