



## *Release of Information Software*

# TOUR

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ROIbase Release of Information Software combines correspondence and communications management with disclosure logging. It lets you track and bill patient/resident medical record copy requests, log patient/resident-related activity, log charges and payments, and log HIPAA trackable protected health information (PHI) disclosures. You can then generate numerous types of reports, letters, invoices, and pre-defined forms based on your facilities needs. (Including Accounting of Disclosures for facilities who are HIPAA covered-entities, and must comply with the privacy ruling). For use as a HIPAA privacy rule compliance tool, ROIbase comes with sample form letters.

ROIbase can help you save your staff man-hours (which translates into dollars!), minimize data errors caused by manual processes, eradicate redundant entry of data, and maintain a reliable and secure audit trail of activity.

Let us tell you about how efficiently ROIbase can be setup to interface to your existing software applications. Let us show you how easily ROIbase can be tailored to meet your facilities needs.

Logging any type of patient-related communication can provide a valuable audit trail for your business.

## **ROIbase®** Release of Information Software - FEATURES

### ***For all uses***

- An affordable, easy-to-use, Windows-based solution
- Featuring easy installation and setup, and minimal training requirements
- Control user access with passwords and security levels
- Filtered reports to get the information you need
- Statistical reports for administrative requirements
- Sample letters/forms included (native or MS-Word)
- Customized interfaces, reports, imports, and exports as needed
- Import patient identifier data from other systems to minimize redundant data entry

### ***For Release of Information***

- Log and track requests for copies of health information
- Logging out function
- Pre-billing function
- Alerts, due dates, and HIPAA trackable-flag based on the reason for the request
- Flag specific PHI as disclosure-sensitive based on requestor type
- Flag confidential requests
- Flexible charge entry for flat rates, per page, shipping, tax, and other fees
- Requestor Invoices (email or print)
- Email or print letters and forms for patients and requestors

### ***For HIPAA Covered-Entities***

- Log protected health information disclosures
- Email or print letters and forms for patients and disclosure recipients
- Sample privacy-related forms and letters included (native or MS-Word)
- Log patient communications (i.e. restriction and amendment requests, complaints)
- Track suspensions of a patients' right to an accounting of disclosures
- Alerts, due dates, and trackable-flag based on type of disclosure
- User-defined informational text based on type of disclosure for staff education
- Flag specific PHI as disclosure-sensitive based on type of recipient
- Flag confidential entries
- Flexible charge entry for flat rates, per page, shipping, tax, and other fees
- Invoices (email or print) for billable accounting of disclosure requests
- Export PHI disclosures for import to a central ROIbase

## **ROIbase**® Release of Information Software – TECHNICAL SPECIFICATIONS

Platform: Visual Foxpro 6/9 - native Foxpro tables, File/server

-For use on a Local Area Network (LAN), processing is client side (thick-client) - requires server with operating/network system with capacity for MS Windows-based applications, tables reside on server. Best LAN configuration – EXE local – requires 2.5 meg for EXE and related files, and < 7 meg for run-time libraries – temporary files folder on local drive.

Workstations or stand-alone systems:

Windows 98/2000/ME/NT/XP/Vista/Windows 7, minimum 128 meg RAM

Approximate disk space usage per entry: 1200 bytes

Approximate disk space usage for 60,000 entries = 72 meg

**Creative Information Group**

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**ROIbase**® Release of Information Software – Example of a completed copy request. This is the main screen. Print invoice, letters, and outguides for this request. Search by DOB, ID, requestor name or phone, SSN, Transaction#, or Contract#.

The screenshot shows the ROIbase software interface for a completed copy request. The window title is "ROIbase" and the menu bar includes "Output", "Table Maintenance", "Utilities", "Logging Out", and "About". The main header displays "CIG Test Facility" and the date "July 27, 2011".

User: **ROILOG** Password: Supervisor For Site: **CIG Test Facility**

Buttons: Search-F3, Next-F5, Previous-F6, Print-F7, Delete-F8, Done-F9, Sent-F11

Name	DOB	SSN	I.D.Number	Terminal Digit
Smith, Allen	10/10/1966		8474744	4447847

Recipient/Requestor	Type	Log Date	Transaction#
Dept. Of Social Service - LA	DSS	07/01/2011	8

Copy Request

**Reason for Entry**: Disability (Educate)

**Status of Entry**: Pulled

Confidential

**Entry Notes**: Due: \$17.87

Buttons: Patient, Recipient, Suspension, Disclose, Supplemental, Letters, Dts Of Service, Authorization

History of Entry					
Status	Date	Who	Time		
Entered	07/01/2011	ROILOG	11:48:13		
Phoned Pt	07/01/2011	ROILOG	11:52:36		
Phoned Rqstr	07/01/2011	ROILOG	11:53:05		
Pulled	07/02/2011	ROILOG	11:53:50		
Send	07/27/2011	ROILOG	11:55:12		
Complete	07/27/2011	ROILOG	11:55:15		

**ALERTS:**  
 Phoned patient re: authorization requirements 7-1-11 MH  
 DSS contact for this request is Hal Yertle 310-333-4444

MANY REPORTS – Statistics, Receivables, Audit Trail, Entry Details, etc....

The screenshot shows the ROIbase software interface with the "Reports" menu open. The menu items are:

- 1-Entry Listing
- 2-Method/Charge Summary (A)
- 3-Copy Request Statistics (A)
- 4-Reason for Entry Statistics (A)
- 5-Accounting of Disclosures
- 6-Audit Report
- 7-Listing of Reasons for Entry
- 8-Listing of Recipient Types
- 9-Charge/Payment Reporting
- A-A/R Aging Report
- B-Posting Summary

Other visible elements include "Name", "Recipient/Requestor", and "Copy Request" checkbox.

MANY customizable tables to tailor ROIbase to your needs.

The screenshot shows the ROIbase software interface with the "CIG Use" menu open. The menu items are:

- Recipient Types
- Reasons for Entry
- Information Disclosed
- Invoice Line Items
- Letters (Native ROI)
- Users (A)
- Sites
- Status of Entry

Other visible elements include "Name", "Recipient/Requestor", and "Password: Super" field.







Your ADDRESS, PHONE, WEBSITE, ETC. goes here

07/27/2011

Site: CIG Test Facility

TO:  
Magda And Wyans  
123 Main St.  
Santa Monica, CA 90402

This is in response to your request for records to be copied on:

Smitho, Grant Lee

Charges for duplication of records on the above named patient are as follows:

\$ 39.00 = Retrieval

\$ 4.00 = Handling

\$ 6.05 = Exact Postage

\$ 2.91 = Tax

TOTAL MONTHS DUE FOR THIS RECORD: \$44.96

If you wish for YOUR COMPANY NAME HERE to reproduce your requested records, please mail a check MADE PAYABLE TO YOUR COMPANY NAME HERE and mail it to:

YOUR COMPANY NAME HERE  
address  
city, state zip  
phone

NOTE: If you are requesting billing records, please contact the Business Office directly!

### ADMINISTRATIVE REPORTING – i.e. Copy Request Statistics

**CIG Test Facility**  
Copy Request Statistics by Requestor Type  
Entered/Cancelled/Returned/Completed Date Range 06/27/2011 - 07/27/2011  
DATE: 07/27/2011 PAGE: 1

	Entered	This Period--Completed--Returned--Cancelled	Entered	Prior	Completed--Returned--Cancelled	Avg TAT
<b>Attorney</b>	2	1	0	0	0	1.0
<b>DSS</b>	2	2	0	0	0	1.0
<b>Insurance</b>	1	1	0	0	0	1.0
<b>Total</b>	5	4	0	0	0	1.0

**CIG Test Facility**  
Completed Request Turnaround Statistics by Requestor Type  
Completed: 06/27/2011 - 07/27/2011  
DATE: 07/27/2011 PAGE: 1

Aging Categories	1	3	4	6	7	10	11	20	21	99	Avg TAT
<b>Attorney</b>	1		0		0		0		0		1.0
<b>DSS</b>	2		0		0		0		0		1.0
<b>Insurance</b>	1		0		0		0		0		1.0
<b>Total</b>	4		0		0		0		0		1.0