ROI Instructions

ROI's must be completed in blue or black pen to be processed. All writing must be legible for records to be released.

All ROI forms must be submitted with a copy of the requesters ID for verification purposes.

If you are submitting the Transfer ROI, please also complete the Confidential Member Records Disclosure Authorization and submit this form with the Transfer ROI and your ID. This form is available in the posted links with the ROI forms on our website, or may be obtained at the appointment check-in desks, if completing at one of our locations.

There are 2 ROI Forms available:

1. Authorization for Release of Information- General ROI for requesting records.
2. Authorization for Release of Information for Transfers Only- Transfer ROI that is intended only for transferring out of Touchstone.

The Transfer ROI is still the same concept as the General ROI, so you will want to follow the instructions below.

On the top of the ROI, it will ask for the Service Members name and DOB. The Service Members must include both first and last name for the request to be fulfilled. If the Member has a previous last name that they were seen at Touchstone under, you will need to complete a separate ROI form to request the records under the previous name.

Please then provide the CIS # or AHCCCS ID # for your child in the provided spaces. Only 1 of 2 is required.

Person/ Agency Receiving Information:

This section must include the complete name of the person we will be releasing records to. If the person requesting the records is the same person we will be releasing to, we will still need the complete name.

All ROI's must include the complete mailing address in this section for release. We use this for verification and an alternative method of release in case we are unable to fax or email.

If you would like records emailed or faxed, the email address will need to be provided in this section. Please make sure that they are clear and legible for Medical Records to make out. If records are too large to fax or email, we will need to mail out the records in place so please be sure to provide the best mailing address on the ROI just in case.

Size limitations for each method of delivery are as follows below:

- If records request contains 50 pages or more, records will be burned onto disc.
- If records request is smaller than 50 pages, records will be printed out.
- If records request is smaller than 50 pages, records can be faxed.
- If records request is smaller than 70 pages, records can be emailed (Through secure email).

Under Information to be disclosed, check all that apply:

On the Transfer ROI you will need to check all the items off in the “Information to be disclosed” section. These notes are required for transferring out.

This section will need to be completed so Medical Records will know which notes you are requesting. Below is a breakdown of what each option is. If you are still unsure which one to check off, please feel free to use the “Other” option and write which notes you are looking. The “Other” option is also to be used if you are requesting program specific notes (IECP, FCAP, WIT, HNCM, IOP).

Intake Assessment/ Annual Assessments: Assessment completed at time of Intake and Annual Assessment updated from that Initial Intake Assessment.

Med Monitor/ Dr. Consults: Med Monitoring Notes & Dr. Consultations

Psychiatric Assessments/ Evaluations: This includes the Psychiatric Assessment and Evaluations only.

Treatment/ Service Plans: CFT’s, Service Plans and Therapy Treatment Plans.

Integrated Care: Sick New and Sick Established Notes.

Test Results/ Labs- Results of labs

Case Management: Case Management, Billable and Non- Billable notes.

Itemized Billing Statement: Complete List of Dates of Services and cost for each billed service.

COC (Coordination of Care): This option is to authorize temporary COC with an agency or person.

Verbal Communication: This is to allow communication between the staff and the person/ agency records are being released to. This will help if the requestor has any questions regarding the records.

Other (Specify Below): This option is to add anything not listed that you would like a copy of. Check this option and then list below in the, “Other Information to Include:” which items you are requesting.

Dates of Records: You can either pick specific dates or 2 years from the date you sign the ROI will be released, if left blank.

Purpose of Disclosure: You may use this space to provide the reason you are requesting the records.

On the Transfer ROI: Please include the reason you are requesting to transfers that this information can be provided to the new agency.

ROI’s can be used for extended release for up to a year, if there are no changes. If you would like to use this option, you will need to complete the section that states, “I revoke this authorization” and either use the date that is 1 year from the date you are signing the ROI form, or you may check off one of the other options listed in this section.

The last section of the ROI is the Signature and Date of Signature. The legal guardian will need to complete this section if the Member is under 18 years old. If the Member is 18 or older, they will need to sign and request the records.

If the requestor has POA of the adult Member then they would sign but we would also need a copy of the POA submitted with the ROI form and picture ID. If there is any legal documentation regarding custody, you would want to submit that with the ROI as well.

Once the ROI form is completed, you will need to either make a copy of your picture ID. The ROI and ID can be submitted any 1 of the 3 ways listed below:

1. Email: Email to MedicalRecords@touchstonebh.org
2. Fax: Fax to 602.732.5463
3. Drop off: Drop off to any Touchstone location

Please allow 7 to 10 business days to process medical records request. In the event, you have an urgent medical records request, please note this on the ROI form and we will do our best to accommodate.

For ROI's that are submitted for Transferring agencies, we ask that you allow us 30 days to process these. There are further steps that will be needed to process a transfer so they generally take longer to process.

If there are any questions regarding the ROI form, please feel free to contact our Medical Records Specialist, Andrea Fushek at 602.908.6027 or by email at MedicalRecords@touchstonebh.org.