

**REPORT/RECOMMENDATION TO THE BOARD OF SUPERVISORS  
OF THE COUNTY OF SAN BERNARDINO  
AND RECORD OF ACTION**

July 28, 2020

**FROM**

**WILLIAM L. GILBERT, Director, Arrowhead Regional Medical Center**

**SUBJECT**

Amendment to Agreement with InService ROI, Inc. for Medical Record Release of Information and Copying Services

**RECOMMENDATION(S)**

Approve **Amendment No. 2 to Agreement No.16-614** with InService ROI, Inc., effective July 29, 2020, to increase contract amount by \$300,000, from \$560,000 to \$860,000, with no change to the contract period of September 1, 2016, through August 30, 2021, for medical record release of information and copying services.

(Presenter: William L. Gilbert, Director, 580-6150)

**COUNTY AND CHIEF EXECUTIVE OFFICER GOALS & OBJECTIVES**

**Operate in a Fiscally-Responsible and Business-Like Manner.**

**Provide for the Safety, Health and Social Service Needs of County Residents.**

**FINANCIAL IMPACT**

Approval of the item with InService ROI, Inc. will not result in the use of Discretionary General Funding (Net County Cost). The additional cost of \$300,000 is funded State Medi-Cal, Federal Medicare, private insurances, and other departmental revenue. Funding sources may change in the future pending any legislative activity related to the repeal and/or replacement of the Affordable Care Act. Sufficient appropriation and revenue are included in the Arrowhead Regional Medical Center (ARMC) 2020-21 budget and will be included in future recommended budgets.

**BACKGROUND INFORMATION**

Approval of this recommendation with InService ROI, Inc. will allow ARMC to provide medical record copy service, including release of information specialists to complete requests for medical record information. Increased regulatory and financial audits have impacted the current workload and workflow of the Release of Information (ROI) team. The increase of \$300,000 will ensure that funding is available for the remainder of this contract allowing InService ROI, Inc. to continue providing services to ARMC by furnishing copies of medical records to various agencies, patient representatives, clinics, and medical offices.

Requests for medical information can be initiated by the patient, physician, attorney (processing both subpoena and non-subpoena), insurance company, or other authorized requestors. Release of Information (ROI) is a very complex task and requires a combination of technical ability and analytical insight to ensure compliance with California State and Federal legal statutes. ARMC must maintain Health Insurance Portability and Accountability Act (HIPPA)

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compliance and assure that patient protected health information is only released to the correct parties after necessary documentation is obtained and validated. Requests for medical records information are checked for compliance with State statutes, HIPAA compliance, legality, authenticity, and validity.

The ARMC Health Information Management (HIM) Department manages the ROI medical record request receipt and authorization process, which includes the validation of the authorizations and requests, and data entry of requestor into a database. The recommended agreement will allow InService ROI, Inc. to perform the release of information processes following authorization of requests, including retrieval (both manual and electronic) and duplication (copying) of the record, delivering the requested information to the requestor, and the data entry involved. InService ROI, Inc. will also be responsible for providing compliant and timely release of information with a high level of quality and accuracy, providing for the safety, health, and social service needs of County residents by ensuring required medical information is provided to the patient, medical provider for follow up care, etc. InService ROI, Inc. will provide full-time onsite staff at ARMC to process the approximately 3,000 requests received monthly, including tracking requests, invoicing customers directly, receiving payments, and disbursing copies of records on paper, electronically, or on compact disc. These releases of information and copying services following authorization by ARMC HIM staff have been provided by an outside vendor since 2008.

**PROCUREMENT**

On August 9, 2016 (Item No. 6), the Board of Supervisors approved Agreement No. 16-614 with InService ROI, Inc. for medical record release of information and copying services in the amount of \$300,000, for the period of September 1, 2016 through August 30, 2019, with a two-year option to extend.

On February 12, 2019 (Item No. 8), the Board of Supervisors approved Amendment No. 1 with InService ROI, Inc. to increase the contract amount by \$260,000 from \$300,000 to \$560,000; and to exercise the two-year extension option for a total contract period of September 1, 2016 through August 30, 2021, for medical release of information and copying services.

This recommendation is the continuation of a competitive procurement as a result of an RFP award.

**REVIEW BY OTHERS**

This item has been reviewed by County Counsel (Charles Phan, Deputy County Counsel, 387-5455) on July 8, 2020; Purchasing (Jackie Ambrose, Buyer III, 387-2463) on July 8, 2020; ARMC Finance and Budget (Chen Wu, Finance Budget Officer, 580-3165) on July 9, 2020; Finance (Yael Verduzco, Administrative Analyst, 387-5285) on July 10, 2020; and County Finance and Administration (Matthew Erickson, Chief Financial Officer, 387-5423) on July 13, 2020.

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**APPROVED (CONSENT CALENDAR)**

Moved: Josie Gonzales Seconded: Robert A. Lovingood  
Ayes: Robert A. Lovingood, Janice Rutherford, Dawn Rowe, Curt Hagman, Josie Gonzales

Lynna Monell, CLERK OF THE BOARD

BY   
DATED: July 28, 2020



cc: ARMC- Gilbert w/agree  
Contractor- C/O ARMC w/agree  
File- w/agree  
la 07/29/2020