

03-09-001 – Medical Record Requirements
 Exhibit A – Access to Medical Records Under Limited Circumstances

University of Michigan Health (UMH) faculty and staff are permitted to access medical records via MiChart only as required for treatment, payment, or healthcare operations or *under the limited circumstances* as specified in the table below. *Access to medical records via MiChart under these limited circumstances is limited to view only.* In all cases, the best option and better alternative is to utilize the patient portal/proxy access to the patient portal (www.myuofmhealth.org), as explained in the last column in the table below.

Faculty and staff may not document, enter or alter information, schedule appointments, communicate with the provider, etc. when accessing medical records directly via MiChart in these limited circumstances. Please refer to the UMH Compliance Program website for [additional information](#) on accessing medical records.

UMH Faculty and Staff Access to Medical Records Table			
	View	Document/Edit/Add/Delete	Best Option/Alternative: MyUofMHealth.org
To use your own record for testing and/or training	Yes - UMH faculty and staff are permitted to view information from their own records.	No – UMH faculty and staff are not permitted to document, edit, add or delete information in their own record. It is not permissible to use the EHR production environment and/or your own record for testing and/or training. If you need to use a medical record number (MRN), for testing and/or training purposes, please refer to #4 below.	Not applicable
To your own record	Yes - UMH faculty and staff are permitted to view information from their own records.	No - UMH faculty and staff are not permitted to document, edit, add, or delete information in their own record. If there is an error or omission in the record, please refer to #3 below. It is not permissible to use the EHR to communicate with your provider.	UMH faculty and staff may view parts of their medical record through their patient portal. They may also message providers, request appointments, and refills, and pay their bills online.

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To a spouse, partner, child 18+, other family member, friend, coworker	UMH faculty and staff are permitted to view information in the medical record of a person in this category if the patient has completed an Authorization to View Electronic Patient Information form. See #1 below for additional information.	No - UMH faculty and staff are not permitted to document, edit, add, or delete information in the record of individuals in this category unless they are a caregiver of the patient, and it is for treatment, payment, or healthcare operations. If there is an error or omission in the record, please refer to #3 below. It is not permissible to use the EHR to communicate with the patient's provider.	Patients in this category may grant proxy access to the patient portal to the UMH faculty or staff member.
To your child's record and the child is 0-10 years old	Yes - UMH faculty and staff are permitted to view and print information from their child's record if they are 0-10 years old.	No - UMH faculty and staff are not permitted to document, edit, add, or delete information in the record of their child and are not permitted to use the EHR to communicate with the child's provider. If there is an error or omission in the record, please refer to #3 below. It is not permissible to use the EHR to communicate with the patient's provider.	UMH faculty and staff who have a child between the ages of 0-10 may request proxy access to their child's patient portal. They may also message providers, request appointments, and refills, and pay their bills online.

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To your child's record and the child is 11-17 years old	No - UMH faculty and staff are not permitted to access their child's record if the child is 11-17 years old. Parents must submit an authorization for records to the HIM ROI Unit for a copy of their child's medical record. See #2 below for additional information.	No - UMH faculty and staff are not permitted to document, edit, add, or delete information in the record of their child and are not permitted to use the EHR to communicate with the child's provider. If there is error or omission in the record, please refer to #3 below. It is not permissible to use the EHR to communicate with the patient's provider.	UMH faculty and staff who have a child between the ages of 11-17 may request proxy access to their child's patient portal. See the FAQs on www.myuofmhealth.org for information that is available through this proxy access. They may also message providers, request appointments, and refills, and pay their bills online.

1. [Authorization to View Electronic Patient Information](#) forms are used when an adult patient wishes a UMH employee who has EHR access to view their electronic medical record directly via MiChart. The form must be returned to HIM and imaged into the EHR prior to any access, and the access is limited to *view only*.
2. The HIM ROI Unit processes requests for copies of the medical record. The [Authorization to Release Copies of a Medical Record](#) form must be completed and returned to the HIM ROI Unit. Contact 734-936-5490 with questions. Parents requesting a copy of their 11-17 year old child's record: there is the possibility that information concerning reproductive health, substance abuse, and mental health care services may be redacted from the record if your child has received these services without your consent. Please refer to Policy [03-07-018](#), Minors: Consent to Confidential Health Services and Policy [03-07-019](#), Access to and Disclosure of a Minor Patient's Protected Health Information (PHI).
3. All patients and/or their personal representatives, including patients who are UMH faculty and staff, who wish for their medical record documentation to be modified, must either discuss the issue with the provider who made the entry and ask for the modification or complete the [Patient Request for Amendment to the Medical Record](#) form. Please refer to policy [01-04-330](#), Patient Right to Access & Right to Request Amendment to their Medical Record for additional information.
4. UMH faculty and staff who wish to use medical records to test and /or train must use the Practice environment in MiChart which all users have access. Information (what it is, obtaining a username, and directions for accessing) regarding the practice environment can be found [here](#).