

Records Request & Chart Copy Packet Cheat Sheet

Reviewed by the BastionGPT Clinical Advisory Board · July 2026

A records request and chart copy packet is what a practice produces when a client asks to inspect or copy their own record: a cover letter, an itemized cost-based fee notice, a denial letter when a ground applies, and an internal log entry. The US clock: 30 calendar days from receipt (45 CFR 164.524).

Request intake and the log the clock starts here

Do: date-stamp on receipt, verify identity by a reasonable method, and open the log entry with a due date.

Pitfall: your form, an office visit, or notarized ID before day one; the received date never moves.

Scope: the designated record set what must be released

Do: include progress notes, medication records, test results, treatment plans, and billing records.

Pitfall: withholding by label; only psychotherapy notes stored apart from the chart are excluded.

Access request or authorization? the fee-setting boundary

Do: apply the 30-day clock and cost-based cap to the client's own request or signed directive.

Pitfall: billing an access request off a state per-page schedule; those rates belong to authorization disclosures.

Cover letter dates, contents, format

Do: state received date, response date, what is enclosed, and the format; match the format requested.

Pitfall: refusing the email or portal copy the client asked for; the top failure in access reviews.

Fee notice cost-based only

Do: itemize labor to copy, supplies, postage, and any agreed summary; flat \$6.50 fits electronic copies.

Pitfall: per-page math on an EHR export, or retrieval and search charges; never allowed for access.

Denial letter, if any narrow and reviewable

Do: name the ground plainly; endangerment calls need a licensed professional and a different reviewer.

Pitfall: a blanket "mental health records" denial; no such ground exists, and distress does not qualify.

Outcome and the log your only proof

Do: log action date, format, fee, and outcome; keep the documentation 6 years (45 CFR 164.530(j)).

Pitfall: no log entry; a timely response you cannot prove loses the OCR complaint anyway.

Before it goes out

- ☐ Receipt date logged; action inside 30 days
- ☐ Format matches the request where producible
- ☐ Fee cost-based; no retrieval or search charges
- ☐ Psychotherapy notes separate, or released
- ☐ Any denial names its ground and review path
- ☐ Complaint routes given: practice and OCR
- ☐ Log complete: dates, format, fee, outcome

Drafting with AI

Give it the request facts: what was asked, when it arrived, the format requested, fee inputs, anything withheld.

"Draft a records request response packet: received July 6, complete record, electronic copy by portal, no fee, psychotherapy notes kept separate."

Never paste client-identifying information into consumer AI tools. BastionGPT is HIPAA-compliant with a signed BAA on every plan.

300 to 700 words
typical packet length

20 to 40 min by hand
clinical team estimate

30 calendar days
US response clock

Client · OCR · your log
who reads it

Records Request & Chart Copy Response Template

Copy or print for your practice · Adapt fields to your organization's, payer's and jurisdiction's documentation requirements.

Practice/program: _____ Date request received: _____ Received by: _____

Client (initials): _____ Response due (30 calendar days): _____ Format requested: _____

Requester and identity verification

Client · personal representative · third party directed in a signed writing (attach it) · verified by a reasonable, barrier-free method

Records requested

Date range and record-set portions: progress notes, medication records, test results, treatment plans, billing records

Cover letter: enclosed and withheld

Received date · response date · what is enclosed · format provided · items withheld with the plain-language ground · psychotherapy notes kept separate are not released

Fee notice (client access: cost-based only)

Labor to copy · supplies · postage · agreed summary · estimate given · prepayment requested · never retrieval, search, or system costs

Denial or partial denial, if any

Ground and whether reviewable · endangerment judgment by a licensed professional · review by a different licensed professional · complaint paths: the practice and OCR

Outcome log (keep 6 years, 45 CFR 164.530(j))

Date completed · format provided · fee charged · extension notice date if used

Completed by (name and role): _____ Signature: _____ Date: _____