

July 30, 2025

## Upcoming Clinical Quality Medical Record Collection

Dear provider,

In the coming weeks, the Health Plan of San Mateo (HPSM) will be partnering with an organization called Episource to collect medical records. The purpose of this clinical record review is to search for the presence of documented ICD-10 diagnoses not previously reported to the Centers for Medicare and Medicaid Services (CMS). Your compliance with this medical record collection ensures that HPSM can report complete and accurate data about your patients to CMS.

**A representative from Episource will contact your office to provide you with a list of records for collection and will work with you to determine the most efficient method for record collection.**

In-network providers are obligated to abide by Section 164.506(c)(4) of the HIPAA Privacy Rule, which permits medical providers to disclose patient medical information without a signed authorization from the patient. In addition, HPSM's contract stipulates that requested medical records be submitted at no charge.

Please anticipate receiving a call and fax from Episource to schedule the medical record retrieval. The items listed below are the components requested, if applicable, for all dates of service for calendar years 2024-2025:

- Demographic/Face Sheet
- History & Physical
- Consult Notes
- Progress Notes
- Vitals & Lab Results
- Operative Reports
- Procedure Reports
- Problem List
- Signature Log

A representative from Episource will contact your office to validate patient information and to determine the most efficient method for record collection. Collection options include:

- Electronically available (preferred) - If your practice uses Electronic Medical Records (EMR), the vendor will work directly with you prior to the visit to determine the most efficient and secure method of information transfer.

- If the documents are not available in an electronic format, the vendor will work with your office to provide different methods to obtain the requested records.

If you have any questions about this medical record collection request, please contact Ingrid Cornejo, Revenue Data Operations Project Specialist, at [Ingrid.cornejo@hpsm.org](mailto:Ingrid.cornejo@hpsm.org).

Thank you,  
The Health Plan of San Mateo