

# Medical Records Retrieval Process Update

Great news! Recently, two **NEW** producer notifications were implemented to inform the field when a Medical Record requirement was ordered by the underwriter.

The two new Subscriber Notifications (email address provided/on cover sheet) are:

- **Connect Invite Notification** – This is sent when the underwriter orders a Medical Records requirement, Order Type EHR or Health Check. It informs the field that Prudential sent the client an email, inviting them to connect to their patient portal. It also includes a shareable link that the field can use to encourage their client to connect.
- **Order Creation Notification** – This is sent to the field when the underwriter orders a Medical Records requirement, Order Type APS or APS ReCheck. It informs the field that they are successfully subscribed to receive notifications, and that no further action is needed by them or the client, unless they are notified.

When receiving the new Connect Invite Notification, the hope is that the field will take the opportunity to reach out to their client and encourage them to connect to their patient portal. Statistics show when a client successfully connects to their portal, underwriters can make a decision 70 – 80% of the time\* and this can expedite the Medical Records retrieval process to **one business day**.

Click here for a one-page [“quick start guide”](#) for financial professionals to share with clients. If a client prefers a longer guide, click here for a version with [FAQs](#).

## Current HAPI Subscriber Notification emails sent:

1. **Connect Invite** – The underwriter orders a Medical Record requirement, Order Type: EHR or Health Check (new).
2. **Order Creation Notification** – The underwriter orders a Medical Record requirement, Order Type: APS, APS ReCheck (new).
3. **Connect Declined** – The client has declined to connect to their medical portal.
4. **Special Authorization Notification** – Where required, a special authorization has been sent to the client for their signature. Note: Subscribers now can upload **completed special authorizations** using the link received in their notification.
5. **Order Update** – Occurs when the order pivots to an APS with ReleasePoint on day 8, if electronic health records were not found/received.

\*Decision is defined as: The underwriter did not need to request additional APS(s)/more record(s) after the original medical records were reviewed.

**Overview: The Human API Electronic Medical Records Retrieval Process (see [Medical Records Service Guide](#)):**

1. **Day 1** – Human API sends an email request to the client to connect to their patient portal. The field also receives a notification (new).
2. **Day 3** – Human API begins pinging additional electronic data sources for medical records. The delay to day 3 allows the client more time to connect to their patient portal, which is the best option.
3. **Day 8** – If Human API does not receive medical records from either the patient portal or the additional data sources, Human API automatically pivots and orders an APS through ReleasePoint.

**Human API Video Link:** <https://www.youtube.com/watch?v=gIRaIGxHjGg> (can be sent to clients)

It is important for case managers/producers to educate and encourage clients to connect to their patient portals. By connecting to their patient portals, the Medical Records retrieval process is streamlined, and the underwriting process can be expedited.

We're excited about all the enhancements, collaboration, and process transparency Human API continues to develop and build. Let me know if you have additional questions.

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