

Client records request response log

A practical California working record - editable in Word

USE IT THIS WAY Use when a client or authorized representative asks to inspect or obtain their health record. Start a different workflow if what arrived is a subpoena, court order, or third-party demand.	DO NOT MISTAKE IT FOR THIS This does not decide authorization, privilege, withholding, or whether a summary should replace access. Those can require legal and clinical judgment.
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Working record

Prepared by	
Reference (no names)	
Date opened	
Next review date	

Six review points

1

☐ Classify what arrived

Record whether this is the client's access request, an authorized-representative request, a subpoena, a court order, or something else. The deadlines and duties are not interchangeable.

Your record: _____

Source: [Therapist Support: California client records guide](#)

2

☐ Preserve the request and receipt date

Keep the written request and record when it arrived. California's inspection and copy periods run from receipt.

Your record: _____

Source: [California Health and Safety Code § 123110](#)

3

☐ Calendar inspection and copy deadlines separately

Section 123110 permits inspection within five working days and requires copies within 15 days. Record both even if only one is currently requested.

Your record: _____

Source: [California Health and Safety Code § 123110](#)

4

☐ Record the response path

Choose and document inspection, copies, a section 123130 summary, or a carefully reviewed mental-health-record exception. Do not use this log as authority for the choice.

Your record: _____

Source: [California Health and Safety Code § 123130](#)

5

[] Record fees before collecting them

Section 123110 caps ordinary paper-copy charges at 25 cents per page, plus reasonable clerical costs. Record the page count and basis.

Your record: _____

Source: [California Health and Safety Code § 123110](#)

6

[] Close the loop

Record what was provided, how, to whom, and when; preserve any identity or authority verification and the clinical or legal basis for a non-routine response.

Your record: _____

Source: [Therapist Support: California client records guide](#)

Close the loop

Decision / next action	
Owner	
Due date	

Controlling sources

- [Therapist Support: California client records guide](#)
- [California Health and Safety Code § 123110](#)
- [California Health and Safety Code § 123130](#)

Educational information only. Not legal, clinical, tax, billing, or regulatory advice. Recheck every source before relying on an older saved copy. Do not put client-identifying information in a copy you cannot secure.