Using ProviderLink to Process Medical Record Requests and Responses

Document Requests Feature

Providers are able to use ProviderLink's new *Document Requests* feature to process medical record requests and responses. The requests and responses can be sent through ProviderLink as either an online message or by fax to and from other providers.

- The process involves sending and receiving a medical record request in which:
  - o the requestor (i.e., a ProviderLink user) creates and sends a message to a provider requesting medical records for a patient either online or by fax
  - o the provider responds by sending a message to the requestor with the patient medical records attached either online or by fax
  - o the requestor receives the patient's medical records
- ProviderLink also includes a feature that allows users to view a list of medical record requests and responses for each patient on a work list as well as the status of each request (e.g., Forthcoming, Complete, Not Available)

Accessing the New Document Requests Feature

Document Requests is a new menu option on the View Patient Information screen. The menu option is used to access the Document Requests screen, which allows a user to view the list of medical records (i.e., documents) requested for a specific patient.

To access the Document Requests feature:

1. Go to the patient's *View Patient Information* screen.
2. The **Document Requests** option is located on the menu bar. Click **Documents Requests** to access the *Document Requests* screen. See the instructions below for additional information on using the *Document Requests* feature.

Viewing the List of Patient Document Requests

The new Document Requests screen is used to view the list of medical records requests sent and responses received for a specific patient. The list includes:

- ■ *Date Requested*: date/time of the original request
- ■ *Requestor*: user name of the person sending the request
- ■ *Recipient*: the facility name and mailbox of the recipient (i.e., provider)
- ■ *Document Requested*: name of the requested document, which is also a link to the original request
- ■ *Status*: status of the request (i.e., Forthcoming, Not Available, or Complete)
- ■ *Received*: date/time the request was received by the recipient facility
- ■ *Reply*: date/time the request was sent to the requesting facility

To view a patient's medical record request list:

1. Go to the *Main Window* screen (i.e., patient work list view), click the **patient's name** to access the *View Patient Information* screen.

2. On the *View Patient Information* screen, click **Document Requests** on the menu bar to access the *Document Requests* screen, which displays the list of medical records requests sent and responses received for a specific patient.

Creating and Sending a Medical Record Request

The new Add Document Request screen is used to create and send a medical record request to another provider for a patient's medical information. The request can be sent to an online facility via ProviderLink or by fax to a fax-only facility.

To create an online medical record request:

1. Go to the *Main Window* screen (i.e., patient work list view), click the **patient's name** to access the *View Patient Information* screen.

2. On the *View Patient Information* screen, click **Document Requests** on the menu bar to access the *Document Requests* screen.

3. On the *Document* Requests screen, click **Add Document Request** on the menu bar to access the *Add Document Request* screen.

4. Enter the following information on the *Document Request* form. For fields that are optional, complete as needed:

    a. *Recipient* *: Click the **Search** button to search for the recipient (i.e., provider/facility) to send the medical record request.

    b. *From Mailbox* *: Select the recipient's online mailbox from the **drop-down list**.

    c.   *Subject*: Enter the **subject** of the medical record request. Text can be manually typed in, cut and pasted from another application, or entered using the Templates option in the menu bar.

    d.   *Message Instructions*: Enter **message instructions**. Text can be manually typed in, cut and pasted from another application, or entered using the Templates option in the menu bar.

    e.   *Request Description*: Enter **general information** to request this medical record.

    f.   *Document Name**: Enter the **name** of the requested medical record (e.g., Operative Report, Laboratory Report, Radiology Report).

    g.   *Description*: Enter **specific instructions** to request this medical record (e.g., "07/08//8 to 07/13/08 - Please provide the Operative Report.").

    h.   *More button*: Click the **More** button to display another row (i.e., Document Name and Description fields) to request an additional medical record.

    Note: An asterisk * indicates a field that must be completed.

5.   Click the **Send button** to transmit the medical record request.

6.   The *Document Requests* screen returns, displaying the details of each request. In this example, two

medical records (i.e., Operative and Laboratory reports) were requested on the above form.

    a. Click on the document **name** to view the original request.

    b. Since the requestor is waiting for a reply, the status of the request is "Forthcoming."

To create a medical record request to be faxed to a fax-only facility:

1. Complete steps 1-6 above.
2. Since this is a medical record request to a fax-only facility, the request is sent by fax to the recipient facility. ProviderLink will print out the following 3 pages for the sender to fax, which includes:
   a. fax cover page containing a message from the sender
   b. medical record request form
   c. bar-coded, fax-back cover page for each medical record requested to be used by the fax-only facility when sending back the requested medical records
3. The fax-only facility will reply to the request via fax, which will include:
   a. bar-coded, fax-back cover page for each medical record requested
   b. requested medical record(s)

Replying to a Medical Record Request

When an online recipient (i.e., ProviderLink user) receives the medical record request:

- the request is posted to the patient's Document Request list in ProviderLink
- a message is also posted to the patient on the patient's Unread Message screen

To reply to a medical record request online:

1. Go to the *Main Window* screen (i.e., patient work list view), click the **patient's name** to access the *View Patient Information* screen.
2. On the *View Patient Information* screen, click **Document Requests** on the menu bar to access the *Document Requests* screen.
3. In the *Document Requested* column, click the document **name**.

4. The *Document Request* screen displays. There is a *Document Name* and *Document Description* for each requested medical record.

5. To reply to the request, enter the following information on the *Document Request* form.

   a. If a medical record is not available, click the **Not Available** checkbox. A **comment** must also be entered.

   b. If a medical record is available, click the **Browse** button to open the patient's *Document* folder in a separate window. Select the document by clicking the **checkbox** in front of the document name and click **Save**. The *Document* window closes, and the selected document displays on the request form.

   Note: If "Not Available" is not checked and a medical record is not attached, then ProviderLink will send a "Forthcoming" status to the facility that requested the medical record, which displays in the *Status* column on the patient's *Document Requests* screen.

   c. When the request form is completed, click **Send** to transmit the medical records to the requesting facility.

6. The *Document Request*s screen displays. Note that in the *Status* column the status has been updated as follows:

    a. *Not Available*: indicates the medical record was not available (e.g., not found, does not exist, not enough information included in request, etc.).

    b. *Complete*: indicates the medical record was available and sent to the requesting facility.

7. In the *Reply* column, the date and time the medical record request was sent to the requesting facility displays.

Screen view for the facility receiving the document request.

Receiving and Viewing the Requested Medical Records

When the requestor (i.e., ProviderLink user) receives the medical records from either an online or a fax-only facility, the information in the Status and Reply columns on the Document Requests screen is updated as shown in the screen shot below.

When the requestor receives the medical request reply:

- the reply is posted to the patient's Document Request list
- a message is also posted to the patient on the patient's Unread Message screen

To view the reply to the medical record request:

1. Go to the *Main Window* screen (i.e., patient work list view), click the **patient's name** to access the *View Patient Information* screen.

2. On the *View Patient Information* screen, click **Document Requests** on the menu bar to access the *Document Requests* screen.

3. The *Document Requests* screen displays. Note that in the *Status* column the status has been updated as follows:

   a. *Not Available*: indicates the medical record was not available (e.g., not found, does not exist, not enough information included in request, etc.).

   b. *Complete*: indicates the medical record was available and sent to the requesting facility.

4. To view a specific medical record, in the *Document Requested* column, click the document **name**.

Screen view for the facility making the document request.

ProviderLink also updates the status of medical record requests on the patient's Message History screen. A new entry is added each time the status changes.

To view the Message History status updates:

1. Go to the *Main Window* screen (i.e., patient work list view), click the **patient's name** to access the *View Patient Information* screen.

2. On the *View Patient Information* screen, click **History Items** in the *Status* section to access the patient's *Message History* screen.

3. The updates are shown in the *Status* column on the *Message History* screen..