Logging a Request: Patient

CiOX HEALTH

Patient Request Type Process

Follow these steps to log a **Patient** request after selecting a request in **Logging** Task Type:

Step	Action
1	In the **Request Information** section, select **Patient** under *Request Type*.
2	Select the **Country** from the drop down.
3	Enter the Patient's ***Bill to*** information in the appropriate fields. **Note**: There is no "Find Requester" function for patient requests as we do not save patient billing information in our database for future use. Also note that this could be the parent/guardians address or if the patient is deceased, it could be next of kin or could be the POA of the patient if incapacitated.
4	Select the **Delivery Method**.
5	Enter the **Request Letter Date** found on the request letter.
6	Enter the **Facility Received Date.**
7	In the **Reason for Request** drop down, select the primary reason for request and then, if necessary, the secondary. (see note on next page)
8	Depending on the reason for request, you may or may not have to enter a **Ship To** address. For example, "Patient Personal" is a single request entry. "Patient-Transfer" lists the patient as Bill to and wherever they have requested their records to go as the "Ship to"
9	In the **Patient Information** section, complete the **Patient Information** fields if they were not filled in by the ADE. If the system found multiple possible matches for the field, it will be noted by three dots: ⋯ Select the three dots to reveal the possible entries and select the appropriate one or enter the appropriate information.

Continued on next page

Patient Request Type Process, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>In the Medical Information section, select the Requested Record Types.</td></tr>
<tr><td>11</td><td>In the General Information section:
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Non-Billable Reasons</td><td>Requests are Billable by default. You are able to select a reason from the drop down like “Site Requested” to classify this request as non-billable.</td></tr>
<tr><td>Fee Approval Limit</td><td>Patient requests cannot be fee-approved.</td></tr>
<tr><td>Sensitive Data</td><td>If the records contain sensitive information, check this box.</td></tr>
<tr><td>Return Records to Facility</td><td>If the records need to be returned to the facility before being sent to the requester, check this box.</td></tr>
<tr><td>Payment Information</td><td>If payment was received via check and needs to be logged or the facility has the payment, but we need to track it, enter that information here.</td></tr>
</table></td></tr>
<tr><td>12</td><td>Select:

Submit and Next to move onto the next request in your queue.
Save and Close to come back to it at a later time.
Submit and Close to submit and return to your landing page.
Submit and Fulfill to go straight to fulfillment.
</td></tr>
</table>

When the patient is not requesting their own records:

This could be due to a Power of Attorney, Deceased Patient or parent. At the top of the HealthSource screen enter the information for the person who requested the records (not the patient). This requester information is also the “Bill To” information. Choose Reason for Request **Patient Personal** to bill and ship the records to this person (the requester). Choose Reason for Request **Patient Transfer** to bill this person (the requester) and ship the records elsewhere.