Logging a Request-Pull List

CiOX HEALTH

Pull List Process

Follow these steps to log a Pull List request:

Step	Action
1	Select **Pull List** under *Request Type*.
2	If the requestor was not found and populated by the ADE, enter the name or address and zip code of the requester.
3	Select **Find Requester**. If the Requester is not found, select the **Submit to Requester Support** button to send this request to the Corporate queue where it will be researched and added to the database. The request will then be returned to the logging queue with the correct requester selected.
4	Select the **Requester Type**.
5	Enter the **Request Letter Date** found on the request letter.
6	Enter the **Facility Received Date.**
7	Select the **Reason for Request.**
8	In the **General Information** section, complete any fields if necessary.
9	In the **Medical Information** section, select the requested **Record Types.**
10	Click **Continue**. Continue will only be available if all of the required fields have been completed.
11	The **Pull List Patient Information** screen appears (see next page).
12	Enter the number of patients on the pull list and click **Update**.
13	Enter the Last Name, First Name, DOB, and Dates of Service for every patient on the Pull List.
14	Click **Submit** for every patient.
15	When all have been submitted, click **Done**.

Each time you click Submit for a patient, an individual eRequest ID is created for that patient/requester. You do not have to “Submit” every patient on the pull list at the same time. It is possible to begin fulfilling some on the list after they have been created individually and then create the rest at a later time.

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Pull List Request ID Values

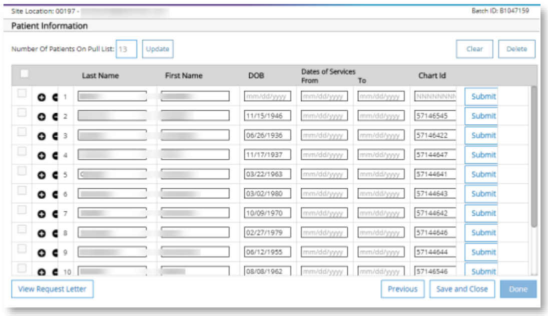
HealthSource tracks both the “parent” Pull List and all “children” requests covering specific patients.

Type	Batch ID	eRequest ID	Requester Type	Patient Name	Status
Pull List	Yes *	No	Yes	No	Logging Completed
Requests	No	Yes	Yes	Yes	Fulfillment Pending

The number in parenthesis after the Batch ID shows how many patient requests were part of the pull list. B1047159(13)

Pull List Patient Information Screen

This screen appears when a Logger enters a manual Pull List. It is not used for any other Request Type and does not appear for a Fulfiller.



Field	Description
Number of Patients on Pull List	Enter the # of individual patients whose records were requested and click **Update**. One row is automatically added for every patient.
Clear	Removes patient information from the selected row(s).
Delete	Deletes selected row(s).
Patient Information Columns	All fields must be filled out for every patient.
Submit	You must Submit the data for each patient row separately.
Done	Click Done when you have submitted all patient rows.
Manually add/delete row	Add: ⊕ Delete: ⊖

<u>**Note:**</u> Users processing pull lists will have full access into the original request letter. The original pull list will show after the cover sheet that HealthSource automatically creates for pull list children. The original pull list as well as the cover sheet that HealthSource automatically creates for pull list children is part of the request package sent to the requester.