Logging a Request: Standard

Standard Request Type Process

Follow these steps to log a **Standard** request:

Step	Action
1	In the **Request Information** section, select **Standard** under *Request Type*.
2	If the requestor was not found and populated by the ADE, enter the address and zip code of the requester.
3	Select **Find Requester**. If there are multiple exact matches, select the requester with the Delivery Type "Electronic" if it exists. If this delivery type does not exist, select the oldest requester # in the list. Remember, it must be 100% exact match. 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 appropriate **Requester Type** if necessary (generally only for Copy Service Major Class).
5	Enter the **Request Letter Date** found on the request letter.
6	Enter the **Facility Received Date.**
7	Enter a **Due Date** if necessary.
8	If requesting electronic delivery, check the box. Even if you chose the appropriate Delivery Method below, this field must also be checked.
9	In the **Reason for Request** drop down, select the primary reason for request and then if necessary the secondary. Do not utilize Invoice Type unless hard-coded.
10	Select the **Same as Bill to** checkbox if the shipping information is the same. If it is not, enter the shipping information in the appropriate fields.
11	Enter the **Requested By** and **ATTN**.
12	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.
13	Enter any identifying information from the request such as claim #, case #, file #, etc. in the **Claim #** field.

Continued on next page

Standard Request Type Process, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>14</td><td>In the Medical Information section, select the Requested Record Types.</td></tr>
<tr><td>15</td><td>In the General Information section:
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Fee Approval Limit</td><td>If the requester asks to be notified of charges, enter the dollar amount in the Fee Approval Limit field. If they want fee approval but did not specify a dollar amount, you must enter $1.00.</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>16</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.
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