Medical Record Requests

When a medical record is requested, there are documentation screens and reports that the facility can use to make the process easier and faster. The first step is to document what is being requested and by whom, and the second would be to use the appropriate reports to print out the whole medical record, or pieces of it.

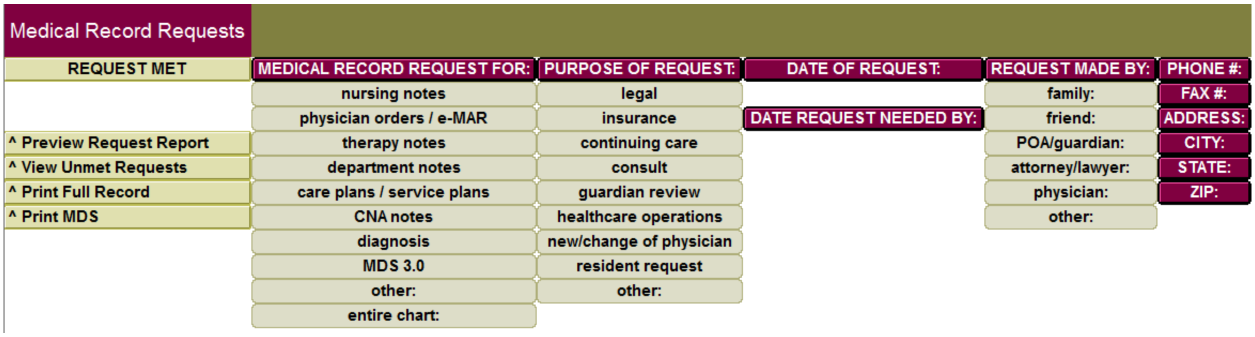
ECS has a topic in the Face Sheet tab called Medical Record Requests. There is also a report that was created with this folder to print out documentation regarding chart request information.

The image below is an example of what your Record Access screen may look like.

Record Access	Record Requests	ADT Information	IDT Notes		MAR/TAR	MDS	Other
Main Menu	New Record Request	Occupancy Dates	Face Sheet Info	RA Charting	Print MAR	View/Print Assessment	View Chart
	Record Request Follow Up	Face Sheet Information	Activity Charting	Care Plans	Print TAR	Print CAAs	View Reports
	Record Request Review	Admission/ Discharge	Dietary Charting	Service Plans			View Calendar
	Record Request Review (Print)	Diagnoses	Nurses Charting	Therapy Notes			
			Social Services Charting	Physician Orders			
			IDT/ Plan of Care Charting	Scanned Documents			
			CNA Charting	Full Record			

Document Medical Record Requests

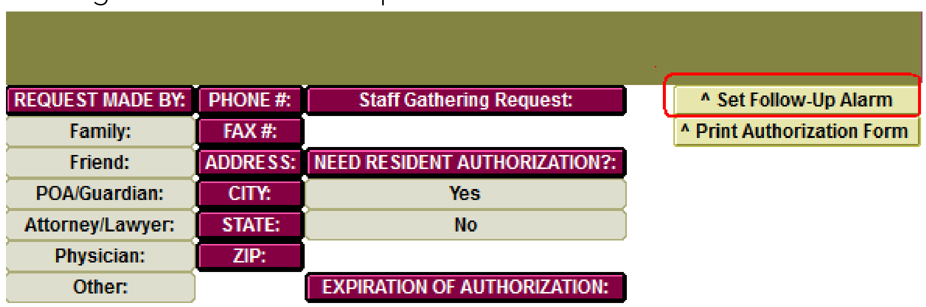
1. From the Main Access screen, click Medical Records.
2. From the Medical Records Access screen, click Record Access. Click onto New Record Request, select a name, and click OK.
3. The Medical Record Requests write screen will appear. Document the request by moving from left to right within the screen.



4. If documenting notes for more than one client, the user can move to the next client by clicking on the arrow button facing to the right next to the Name button (as long as multiple names were selected when entering the screen initially, if not, click onto Name to switch names).
5. Click **Sign** when finished to save the entry and exit out back to the Access screen.

Set a Follow-up Alarm

1. Follow steps 1-3 in "Documenting Medical Record Requests".
2. After documenting information about the Medical Record Request, you can click the button **^Set Follow-Up Alarm**.
3. A calendar appears. Pick the date and time you would like to set the alarm for.



4. Click **Sign** when finished to save the entry and exit out back to the Access screen.
5. A user list will pop up prompting you to choose who you would like the alarm to go to. You can choose more than one user by holding down the **CTRL** key on the computer keyboard.

Follow-up on an Alarm

1. When an alarm pops up on the screen to follow up on a Medical Record Request:
   a. Click **Snooze** or **Reschedule** to pick a new date and time you would like to follow up on the request OR,
   b. Click **Append** to follow up on the request.
2. If you click Append, you will be flipped back into the Medical Record Request documentation screen.
3. Click the **REQUEST MET** go to word in the beginning of the screen. This will jump you to an area of the screen to document information about how and when the request was met.

4. Document the notes by working left to right.
5. Click **Sign** when finished to save the entry and exit out back to the Access screen.

MEDICAL RECORD REQUEST MET:	AUTHORIZATION OBTAINED:	PART OF CHART PROVIDED:	COMMENTS:
via e-mail	Not needed	Nurses Notes,	
via mail	Yes	Physician Orders/MAR,	
via fax	No	Therapy Notes,	
via phone		Department Notes,	
picked up in person		Care Plans,	
		CNA Charting,	
		Diagnosis,	
		MDS,	
		Other:	
		Entire Chart:	

View List of Unmet Medical Record Requests

1. From the Record Access screen, click **Record Request Follow Up**.
2. To follow up on an entry, click on it to tag it red, select **Edit**, and **Append**.
3. Click the **REQUEST MET** go to word. This will jump you to an area of the screen to document information about how and when the request was met.
4. Document the notes by working left to right.
5. Click **Sign** when finished to save the entry and exit out back to the Access screen.

Viewing Medical Record Request Documentation

This screen will allow a user to see all requests that may or may not have been followed up on. The user has the capability to see the full history of the request based on what was requested and what/how it was delivered.

1. From the Record Access screen, click **Record Request Review**.
2. A Control screen will appear. Select a start date and end date (if needed), click **OK.**
3. Click **Go**.

Editing Medical Record Request Documentation

1. From the Record Access screen, click **Record Request Review**.
2. Select name(s) and click **OK**. A Control screen will appear. Select a start date and end date (if needed), click **OK.**
3. Click **Go**.
4. Click on the entry that needs to be edited. The entry will turn red.
5. Click on the **Edit** button and select the desired editing feature.
6. When using Append, DC and Explain or DC and Copy, make the desired change and then click on the **Next** button.
7. Click **Go** to see your changes.

Editing Feature	Function	Example
Append / Append All	Information is permanently attached to the entry; further	Cosigning a student's documentation

	editing will not be able to be done to the entry except to discontinue	
New	A new, separate entry made in the same topic area	Not typically used when editing department notes. Can be used to see where an entry was charted
Copy	An exact copy of the entry is made	An entry was accidentally discontinued and needs to be made active again
Copy One (All) to Other Client[s]	An exact copy of the entry is made and placed in another resident's chart	An entry was accidentally made in the wrong resident's chart. Use ALL if more than one entry was selected
Discontinue and Append	Entry is discontinued and user is taken to a Write screen to document additional notes	An error was made in documenting the entry and the user would like to explain why the entry is being discontinued
Discontinue and New	Entry is discontinued, a new entry is made in its place	Not typically used when editing department notes
Discontinue and Copy	Entry is discontinued, copy of entry is displayed allowing user to make changes to the original entry	User forgot to use a button word when documenting and would like to 'insert' the word into the entry
Discontinue	Entry is discontinued	Not typically used when editing department notes
Discontinue All	All highlighted entries are discontinued for one client	Not typically used when editing department notes
Discontinue Multiple Client Entries	All highlighted entries are discontinued for multiple clients	Not typically used when editing department notes
Skip	Allows user to skip a highlighted entry	Highlighted an entry that does not need editing

Printing a Medical Record Request Report

1. From the Record Access screen, click **Record Request Review (Print).**
2. A Select Dates box will appear. Select desired dates or period and click **OK**.
3. Click the printer icon on the toolbar to print. Click **Exit** when completed viewing/printing the report.

MEDICAL RECORD REQUESTS 10/16/2012 - 09/30/2013

Resident's Name	Documentation Requested	Purpose of Request	Requested By	Date Requested	Date Needed By	Expiration of Auth.	Request Met	Auth. Obtained	Comments
Edwards, Jack C	Nurses Notes, Physician Orders/MAR, Department Notes, Therapy Notes,	Continuing Care, New/Change of Physician,	REQUEST MADE BY: Physician: Dr. James Quam PHONE #: (608)526-4482 FAX #: (608) 526-4483	07/24/2013	08/01/2013				

Viewing/Printing Data for Request

Throughout the rest of the Record Access screen there are several different types of reports to assist the user in obtaining the information requested. Simply click onto the button(s) that is needed, select a date range, and click OK. Once in viewing the specific report, the user can click onto the print icon to print the information or the save button to save the document within a PDF format. If the document is saved, it can then be emailed or saved onto a USB drive, as needed.

If the user is in need of a report that does not have an easy button on the Record Access screen, then they may take a look under any of the buttons in the Other column (View Chart, View Reports, View Calendar). This will display all tasks that the user group has rights to.