

# Glossary Terms Ontellus

- **CSS - Client Services Specialists (Previous names: Account Manager, Case Manager):** This is the person within Ontellus that works directly with our client. They are they only ones that speak directly with the attorney.
- **Billing Records (Itemized Billing Statements):** Will show what the charges were for services rendered. Will also show what the patient paid, what they billed insurance, what insurance paid, what is the balance
- **Client:** Attorney/Law Firm that has hired and commission Ontellus to obtain the needed documents and records for the pending lawsuit. (usually the defense)
- **Client Preferences:** Guidelines given by the client regarding fee limits for the records, what to do if there are no records, etc.
- **Custodian:** The Custodian of Records is the individual at each facility that is responsible for receiving the request for documents and then processing the documents and providing to Ontellus.
- **Custodian Letter:** The cover letter that goes out in the mail with each request.
- **Date of Service (D.O.S.):** The exact dates related to the records we are retrieving. This can either be a specific day, or a date range. Commonly Any and All, or 2019 – present.
- **Invoice:** This is a document provided by the custodian when they require a payment for the copies of the records or images.
- **Film Breakdown/Inventory:** This is a list of images taken on the claimant and the date it was taken. Example: 6/1/16 MRI Left Knee
- **Legals:** This is the document that is sent to the facility with the request that the custodian completes and returns with the records
- **LOR (Letter of Representation):** The custodian can ask for the LOR when a signed authorization is given in order to release records. They need the LOR to connect authorization to Ontellus
- **Letter of Administration:** Document issued by the county clerk which simply states that the person identified in the letter is currently serving in the capacity of administrator or administratrix of an estate of deceased person who died without a will (or who died with a will which did not provide independent administration).
- **Motion to Quash or Protective Order (only applies to subpoenas):** The opposing council does not want records requested or obtained by subpoena from a specific entity. Once we receive this, the request is placed on hold until there is a hearing in court and the judge rules on it.

- **No Records:** The term we use for when a custodian does not have any records on the patient. The person may have never been their patient or they have already been destroyed. Or they may not have records within the scope of the request
- **Notary:** Some of the legal documents require that when the custodian signs the documents, it is witnessed. The witness will then sign and put their notary seal.
- **Order Number:** Every request has an order number. Ex: 184553.010 / 184553-10. The first 6 digits refer to the case, the last 3 digits refer to the part/location.
- **Power of Attorney (POA):** Document that allows someone else, called your "agent" or "attorney-in-fact," to handle all your personal affairs without limitation. The individual you select does not have to be a lawyer; she can be your spouse, another relative or your best friend.
- **Proper Service:** Some facilities require that a subpoena must be hand-delivered to the facility/custodian of records.
- **Proof of Service:** Evidence that proper service of process was accomplished within the correct time period.
- **Received Type:** The drop down used as notes are completed. Provides quick understanding of what happened on the call and/or what is needed next.
- **Rule 11 Agreement (Subpoena Only):** A Rule 11 Agreement comes from the opposing counsel to our client stating that they want our client to agree to a specific way that the records will be processed once received. Has nothing to do with us calling the facility.
- **Scope of Records:** What is being requested from the custodian. Ex: Any and all medical records, or billing records.
- **Sensitive Information:** Information regarding drug and alcohol, mental health records, psychiatric and physiological treatment, HIV and AIDS
- **SOA-Statement of Assurance (Only Subpoenas):** This is a document that is signed by our client which states that no objections were filed and the opposing counsel was notified. The custodian might ask for this to confirm the other attorney did not file objections.
- **TAT (Turnaround time):** This is the time that it will take the custodian to provide the records after receiving the request.
- **Type of Request:** Did we provide the custodian with a subpoena or an authorization?
- **Type of Records Requested:** What type of documents did we request from the facility?
- **VA Medical Records:** These are the hospitals that our military service people go to for their medical treatment