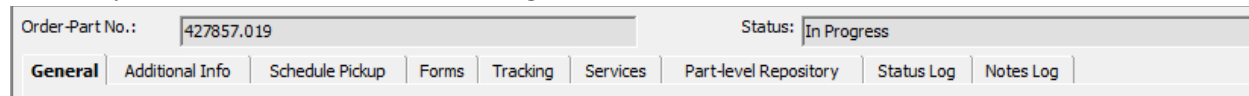
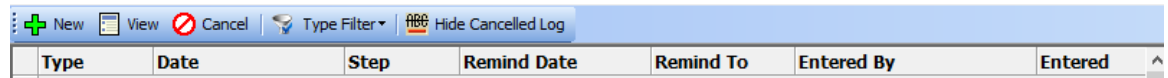


1. Open MR8 and sign in using your credentials
 - a. Hit F2 on keyboard to open Case Manager
 - b. Search the order by either order number or patient's name
 - To search by order number, enter the 6-digit Order Number (**437197.012**) in the Order No. field and click Search
 - To search by patient's name, enter patient's full name, first name, or last name in the Records Of field and click Search
2. Find the correct part using the Part Number (**437197.012**) and double click it to open
3. Review the General tab, PLR, and Notes Log.
4. Dial the number located in the general tab and prepare to enter a note.
5. To enter a note, you will select the tab for Notes Log,



- a.
6. Select New



- a.
7. Enter one of the hot key templates below: (Refer to Cheat Sheet)
 - a. First Call
 - b. Call for Invoice
 - c. Call for Record
 - d. Left Voicemail (After 3 attempts send to Support Needed-Research phone number)
 - e. Call disconnected (Released call due to hold time)
 - f. Support Escalation
8. You will edit your note to relay what was covered on the call using one of the hot keys by entering it in the note. (Refer to Cheat Sheet)
 - a. ~fc
 - b. ~inv
 - c. ~rec
 - d. ~vm
 - e. ~pi
 - f. ~cpn
 - g. ~CA
 - h. ~por
 - i. ~Lost
 - j. ~pmt
 - k. ~void
9. Once you enter your note you will select the proper received type that matches the hot key:
 - a. First Call
 - b. Call For Invoice
 - c. Call for Record
 - d. Voicemail Left

- e. Call Disconnected
 - f. Support (Reference Cheat Sheet)
10. Select the additional tab to set the next activity date.

a.

General	Additional Info	Schedule Pickup	Forms	Tracking	Services	Part-level Repository	Status Log	Notes Log
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- i. First Call – Set 5 business days
- ii. Call for Invoice – Set 5 business days
- iii. Call for Record – Set 5 business days
- iv. Voicemail Left – Set next business day
- v. Call Disconnected-(Extensive Hold Time) Set the activity date for the next business day.
1&2 attempt hold time is 2 minutes. 3rd attempt- wait it out.

11. Change the status if support is needed by:

- a. Selecting the Action Tab
- b. Selecting one of the below:
 - i. –Post Serve Research
 - ii. -Create and Distribute
 - iii. –Scheduling and Pick-up
 - iv. -Custodian Contact
 - v. Accounting Attention
 - vi. Process Lost Files
 - vii. Portal Processing
 - viii. Customer Contact
 - ix. Split Order

<p>Post Serve Research ~ pi Support Needed - Researched Phone#</p>	<p>Create and Distribute REMAIL ONLY Support Needed - Resend</p>	<p>Lost Files ~Lost Support Needed – Lost files</p>	<p>Accounting Attention ~PMT Support Needed – Copy of Check/Void Chck</p>
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<p>Portal Processing ~ por Support Needed - Portal Download</p>	<p>Portal Processing ~por Support Needed - ChartFast/Request</p>	<p>Portal Processing ~ por Support Needed - ChartSwap</p>	<p>Scheduling and Pick UP ~ cpn Support Needed - Notary/PU/HandServe NON CA</p>
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<p>Scheduling and Pick Up ~label Support Needed – FedEx Label</p>	<p>Split Order ~ sr Support Needed – Split Required</p>	<p>Scheduling and Pick Up ~CA Support Needed - CA Copy Service</p>	<p>Scheduling and Pick Up Support Needed - CA POS Needed</p>
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<p>Customer Contact ~Am Support Needed- Amend Required.</p>	<p>Customer Contact ~Ai Support Needed- Add. Info Req.</p>	<p>Customer Contact ~sc or ~dup or ~nc Support Needed - Status & Close</p>	<p>Customer Contact ~rej Support Needed- Subp/Auth Reject Rejected</p>
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<p>Custodian Contact ~FC First Call Activity Date – 5 Calendar Days</p>	<p>Custodian Contact ~IV Call for Invoice Activity Date – 5 Calendar Days</p>	<p>Custodian Contact ~Rcd Call for Record Activity Date – 5 Calendar Days</p>
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Custodian Contact
~LV
Voicemail Left
Activity Date – Next Day

Custodian Contact
~LV
Extensive Hold Time
Activity Date – Next Day

FIRST CALL

~fc

[PHONE NUMBER] spoke with [NAME]. Verified [ENTITIY NAME, ADDRESS, FAX NUMBER]. Confirmed the receipt of the request as of (DATE). Records are copied (IN HOUSE or BY COPY SEVERICE) and the turn around time is (DAYS) Payment is (REQUIRED or NOT REQUIRED) for records to be released. (NAME) confirmed the (RECORDS/INVOICE) will be sent to Ontellus on (DATE, METHOD).

CALL FOR INVOICE

~iv

[PHONE NUMBER] spoke with [NAME]. Verified [ENTITIY NAME, ADDRESS, FAX NUMBER]. The request has been received on (DATE) and the invoice will be sent to Ontellus on (DATE). The invoice will be sent to (fax or email).

CALL FOR RECORD

~rcd

[PHONE NUMBER] spoke with [NAME]. Verified [ENTITIY NAME, ADDRESS, FAX NUMBER]. The payment has been received and records will be sent to Ontellus on (DATE). The records will be sent to (fax or email).

VOICEMAIL LEFT

~vm

[PHONE NUMBER] it went directly to voicemail. Attempted to opt out by pressing 0 but was unsuccessful. Left an urgent, detailed voicemail that we have sent their facility a [SUPBOENA/AUTHORIZATION] request and need them to provide the records and Legals or return our call as soon as possible. Advised them of the due date and stressed that a response is needed urgently.

EXTENSIVE HOLD TIME

~EH

[PHONE NUMBER] placed on immediate hold. Attempted to opt out by pressing 0 but was unsuccessful. Released call due to extensive hold time.

PHONE NUMBER INCORRECT

~pi

[PHONE NUMBER] the number was [DISCONNECTED/BUSY/OUTOFSERVICE]. Escalating to have research done for a working phone number.

COPY, PICK UP, NOTARY

~cpn

[PHONE NUMBER] spoke with [NAME]. Verified [ENTITIY NAME, ADDRESS, FAX NUMBER]. They have received the [SUBPOENA/AUTHORIZATION] request and the [RECORDS] and [LEGALS] are now ready for [COPY/PICKUP/NOTARY].

What needs to be done (notary /pick-up/copy):

Patient name:

Facility name:

Address:

Phone:

Contact Name:

First day records can be picked up:

Records type:

Fee Needed:

Payee:

CALIFORNIA COPY SERVICE

~CA

[PHONE NUMBER] spoke with [NAME]. Verified [ENTITIY NAME, ADDRESS, FAX NUMBER]. They have received the [SUBPOENA/AUTHORIZATION] request and records are now ready for pickup.

Patient Name:

Entity Name:

Pick Up Address:

Custodian Name:

Phone:

Size or Page Count:

Days:

Hours:

Record Type:

No Records-verified:

Completed Dec Included (Y/N):

Limited Scope (Y/N?):

Payee:

Copy on or After:

Notes:

PORTAL DOWNLOAD EXCLUDING ONTELLUS PORTAL

~por

[PHONE NUMBER] spoke with [NAME]. Verified [ENTITIY NAME, ADDRESS, FAX NUMBER]. They have received the [SUBPOENA/AUTHORIZATION] request and the records are ready to be downloaded from the portal.

Copy Service Name:

Request/Invoice Number:

Date uploaded:

ITEMS SENT TO ONTELLUS

~Lost

[PHONE NUMBER] spoke with [NAME]. Verified [ENTITIY NAME, ADDRESS, FAX NUMBER]. Confirmed the order number on file. The custodian advised items were previously sent to Ontellus.

Sent by: (Fax, Email, Mail, Ontellus Portal)

To:

From:

Date:

~PMT

Order Number:

Check Number:

Check Date:

Amount:

Payee:

Patient Name:

~VOID

Check Date:

Check Number #:

Amount:

Payee:

Records Of:

Reason to void:

SPLIT REQUIRED

~SR

[PHONE NUMBER] spoke with [NAME]. Verified [ENTITIY NAME, ADDRESS, FAX NUMBER]. The request has been received on (DATE). (NAME) confirmed [RECORD TYPE] is handled by a different department and confirmed they can only process the request for [RECORD TYPE].

Record Type to be split:

Entity Name:

Entity Address:

Phone Number:

AMEND

~Am

[PHONE NUMBER] spoke with [NAME]. Verified [ENTITIY NAME, ADDRESS, FAX NUMBER]. The request has been received on (DATE) but cannot be accepted. [NAME] advised the request must be amended to be processed.

What needs to be amended: Facility Name or Address

Facility Name:

Facility Address:

ADDITIONAL INFORMATION REQUIRED

~Ai

[PHONE NUMBER] spoke with [NAME]. Verified [ENTITIY NAME, ADDRESS, FAX NUMBER]. [NAME] advised the additional information is required to process the request and explained they are unable to assist.

What information is required:

Reason:

SUBPOENA/AUTHORIZATION REJECTED

~Rej

[PHONE NUMBER] spoke with [NAME]. Verified [ENTITIY NAME, ADDRESS, FAX NUMBER]. The request has been received on (DATE) but cannot be accepted. [NAME] advised the request is being rejected. [NAME] advised they will send over a correspondence advising this via [FAX, EMAIL,MAIL] on [DATE]

Type of request:

Reason for Rejection:

STATUS AND CLOSE

~SC

[PHONE NUMBER] spoke with [NAME]. Verified [ENTITIY NAME, ADDRESS, FAX NUMBER]. The request has been received on [DATE]. [NAME] advised [No records exist for this patient.]

Status and Close Reason:

NON COMPLIANT

~Non

[PHONE NUMBER] spoke with [NAME]. Verified [ENTITIY NAME, ADDRESS, FAX NUMBER]. The request was received on [DATE] and I have spoken with the supervisor [NAME] who confirmed they will not be sending records to Ontellus.

Reason: This facility is non compliant

DUPLICATE

~Dup

[PHONE NUMBER] spoke with [NAME]. Verified [ENTITIY NAME, ADDRESS, FAX NUMBER]. They confirmed the receipt of the request for order [number] and order [NUMBER]. They confirmed both orders are considered a duplicate to each other as records are both pulled from the same system and also advised both entities are affiliated with one another.

Reason: This order is a duplicate to order [#####.###]