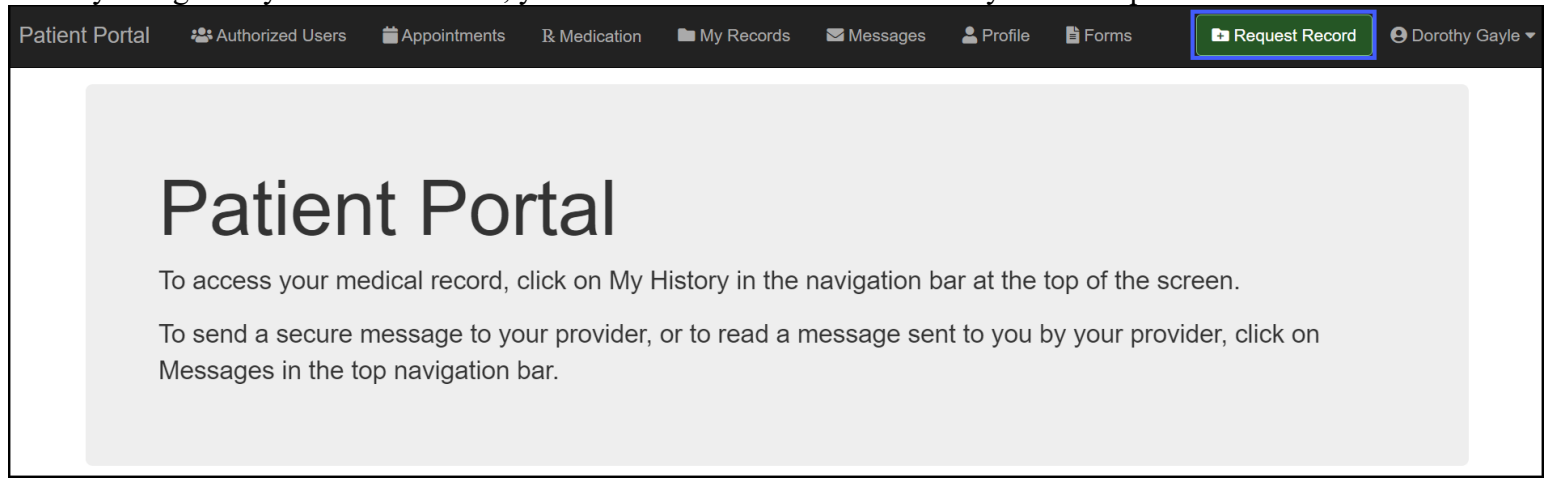


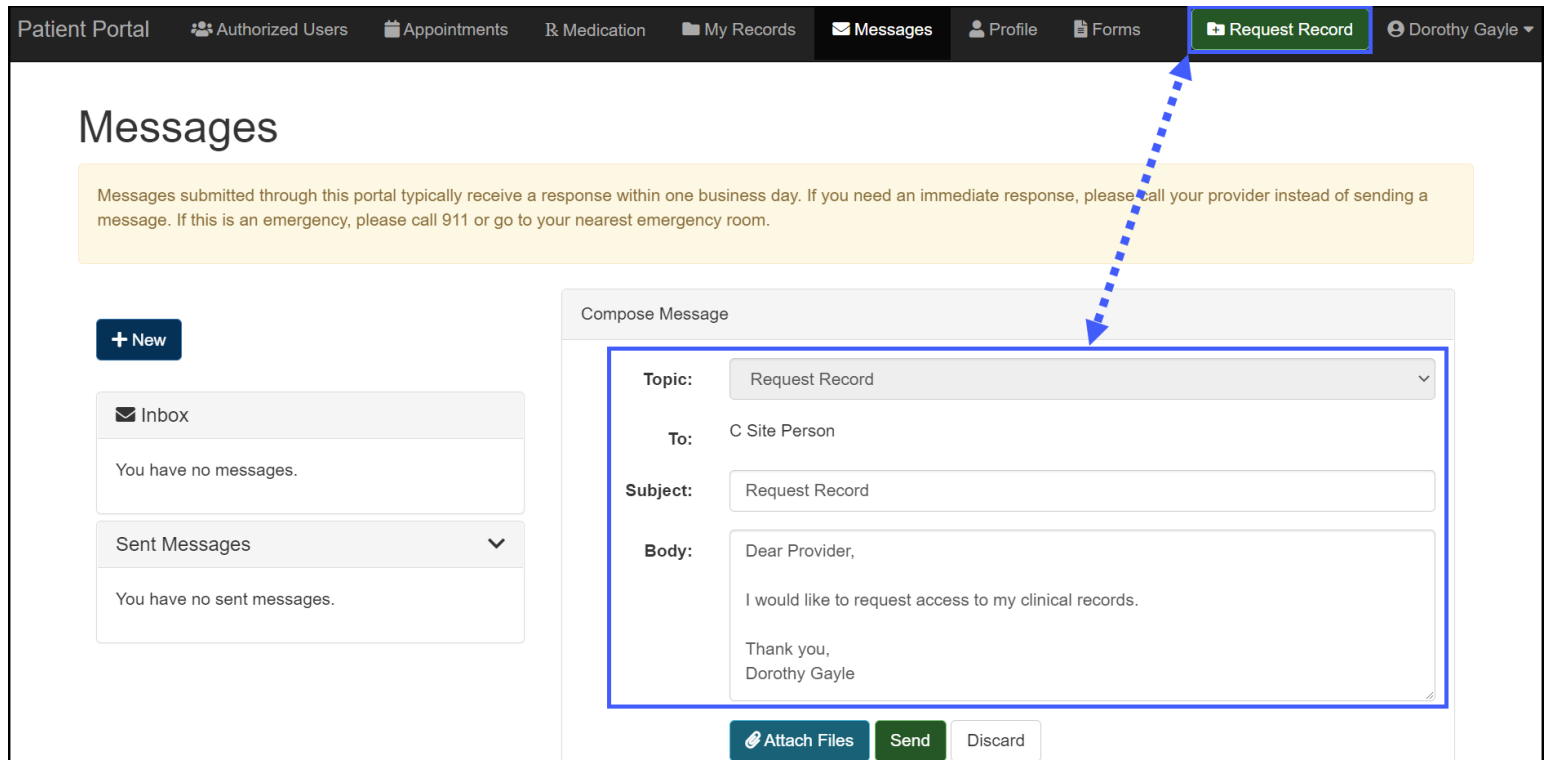
Requesting Records via the Patient Portal

Please note: a fictional patient was used for this documentation.

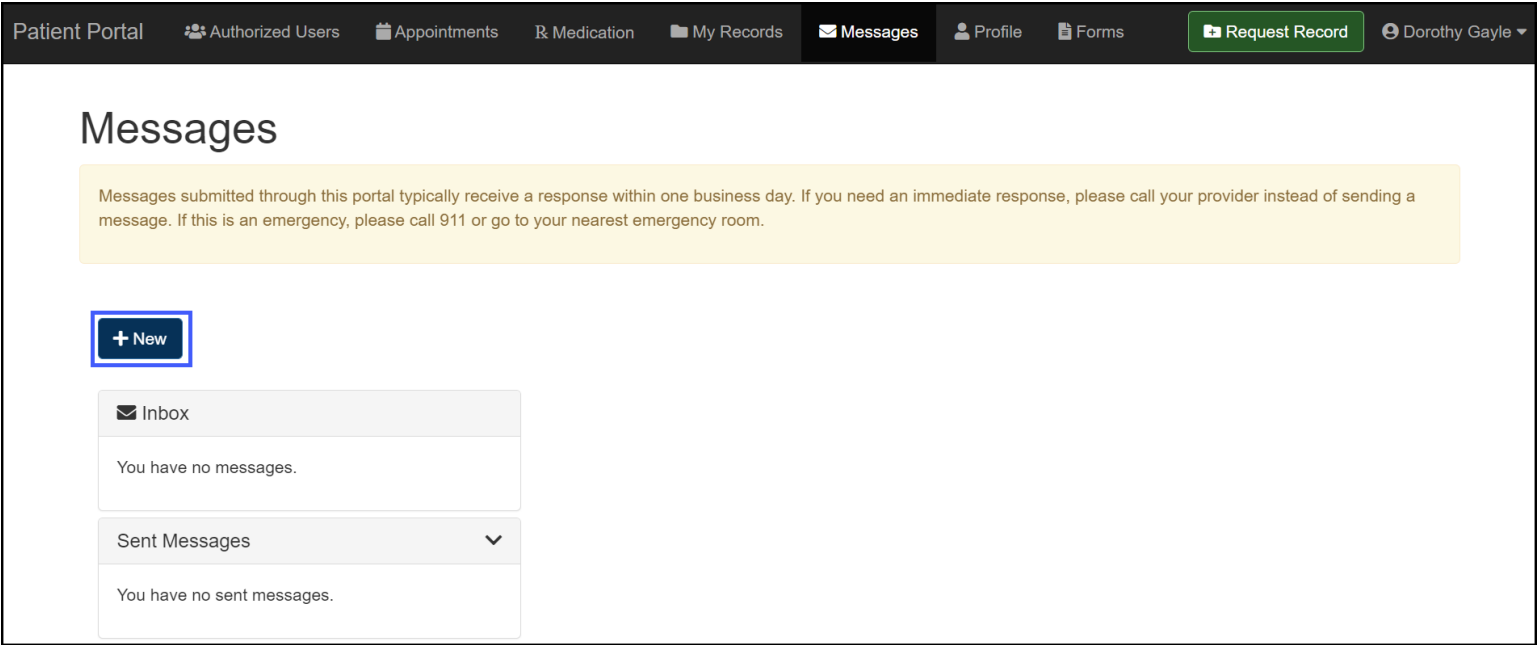
When you log in to your Patient Portal, you will see a button that will allow you to 'Request Records'



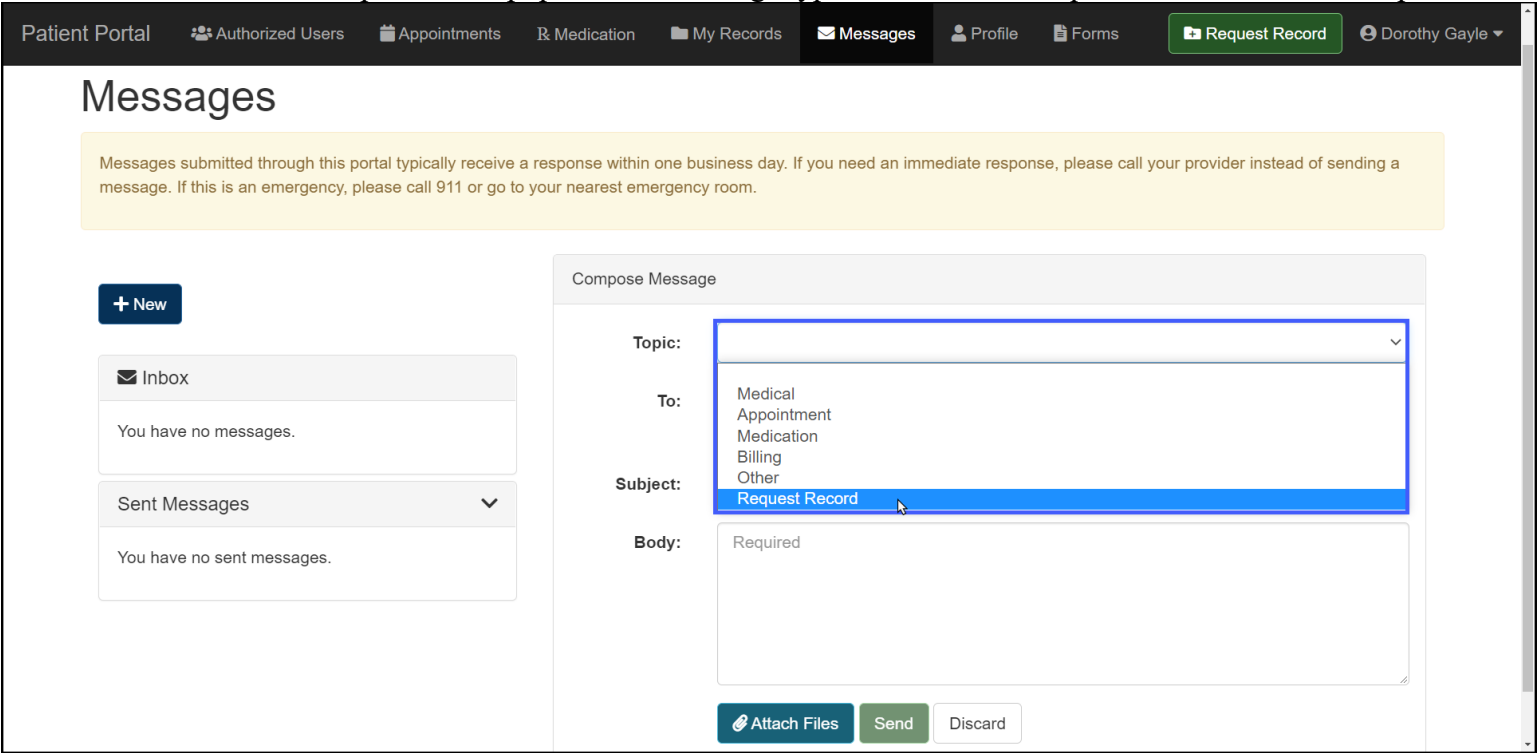
Clicking on the 'Request Record' button auto populates the Topic, To, Subject and Body. All you need to do is click 'Send'.



You are also able to Request Records from within the Messages Tab. Once you have accessed the Messages Tab, click '+New'.



Click on the arrow in the Topic field to populate the message types. Then select Request Record from the dropdown.



Once Request Record is selected the rest of the message content will auto populate.

The screenshot shows the 'Patient Portal' interface with a top navigation bar containing links for 'Authorized Users', 'Appointments', 'Medication', 'My Records', 'Messages' (highlighted), 'Profile', and 'Forms'. A green 'Request Record' button is also present. Below the navigation bar, the 'Messages' section has a yellow informational banner. On the left, there are 'Inbox' and 'Sent Messages' sections, both indicating 'no messages'. The main area is the 'Compose Message' form, which includes a 'Topic' dropdown set to 'Request Record', a 'To' field with 'C Site Person', a 'Subject' field with 'Request Record', and a 'Body' field containing a pre-filled message. At the bottom of the form are 'Attach', 'Send', and 'Discard' buttons. Blue callout letters 'a', 'b', 'c', and 'd' are placed near the 'To', 'Subject', 'Body', and 'Send' fields respectively.

Patient Portal Authorized Users Appointments Medication My Records Messages Profile Forms Request Record Dorothy Gayle

Messages

Messages submitted through this portal typically receive a response within one business day. If you need an immediate response, please call your provider instead of sending a message. If this is an emergency, please call 911 or go to your nearest emergency room.

+ New

Inbox
You have no messages.

Sent Messages
You have no sent messages.

Compose Message

Topic: Request Record

a To: C Site Person

b Subject: Request Record

c Body: Dear Provider,
I would like to request access to my clinical records.
Thank you,
Dorothy Gayle

Attach **d** Send Discard

- a) If the practice has set up a default recipient they will populate here, otherwise you will have the option to select a recipient.
- b) The subject of the message will auto populate as shown. You are able to change this text.
- c) The body of the message will auto populate as shown. You are able to change this text.
- d) Once you are content with the content of the message, click the 'Send' button.

You will encounter a notification at the bottom right area of your screen indicating your message was sent successfully.



Your provider or the person designated to receive these requests on behalf of the practice will be sent a message requesting access to your records for you.

Once the request has been processed, you will get a message on the portal indicating that you have access to your records.

Patient Portal

Authorized Users

Appointments

R Medication

My Records

Messages

Profile

Forms

Request Record

Dorothy Gayle

Messages

Messages submitted through this portal typically receive a response within one business day. If you need an immediate response, please call your provider instead of sending a message. If this is an emergency, please call 911 or go to your nearest emergency room.

+ New

Back

Reply

Delete

Inbox

From: Michelle Display 4/1/21 2:16 PM

Re: Request Record

Sent Messages

To: C Site Person 4/1/21 12:06 PM

Request Record

Re: Request Record

From: Michelle Display 4/1/21 2:16 PM

To: Dorothy Gayle

Your records request has been processed and your data is now available in your patient portal.

Click on the My Records tab to view the available records. Click 'View' to review a specific record.

Patient Portal

Authorized Users

Appointments

R Medication

My Records

Messages

Profile

Forms

Request Record

Dorothy Gayle

My Records

View Access Log

Medical Records

From mm/dd/yyyy To mm/dd/yyyy Filter Reset

Medical Record generated for March 1st, 2021

View Download Transmit

Medical Record generated for March 3rd, 2021

View Download Transmit

Medical Record generated for March 5th, 2021

View Download Transmit

You will likely need to scroll a bit to see all of the record. When you are done, click the 'Close' button.

Patient PortalAuthorized UsersAppointments& MedicationMy RecordsMessagesProfileFormsRequest RecordDorothy Gayle

My RecordsView Access Log

Medical Records

Frommm/dd/yyyyTo mm/dd/yyyyFilterReset

Medical Record generated for March 1st, 2021

CloseDownloadTransmit

Summarization of Episode Note

Patient	Dorothy Gayle		
Date of birth	July 5, 1997	Sex	Female
Race		Ethnicity	
Granular Race		Preferred Language	Information not available