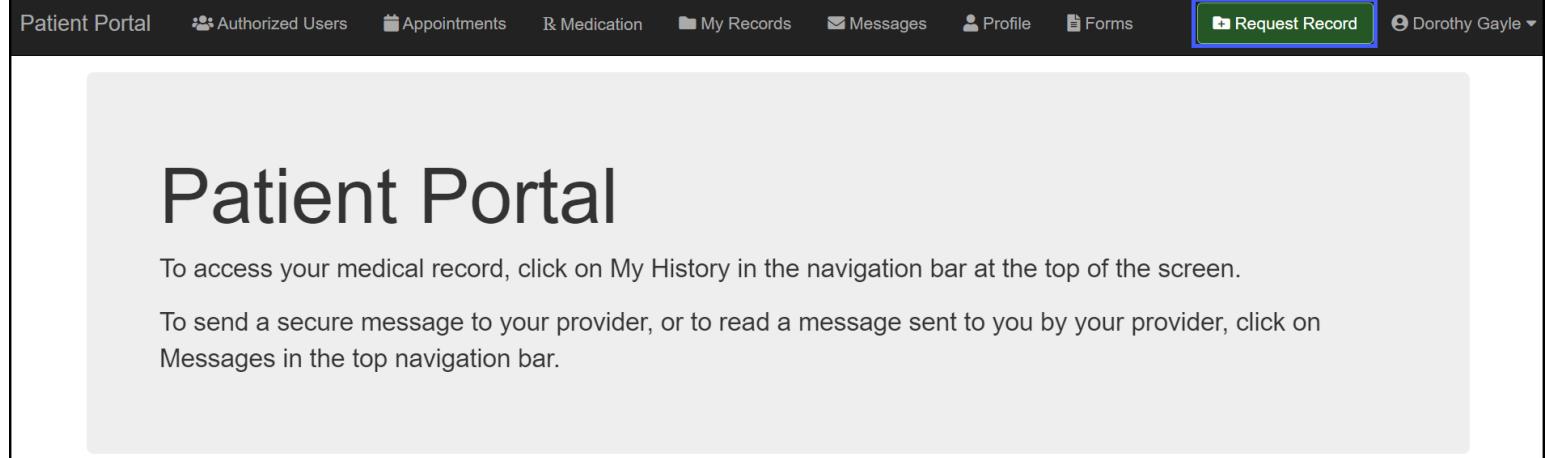


Requesting Records via the Patient Portal

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'



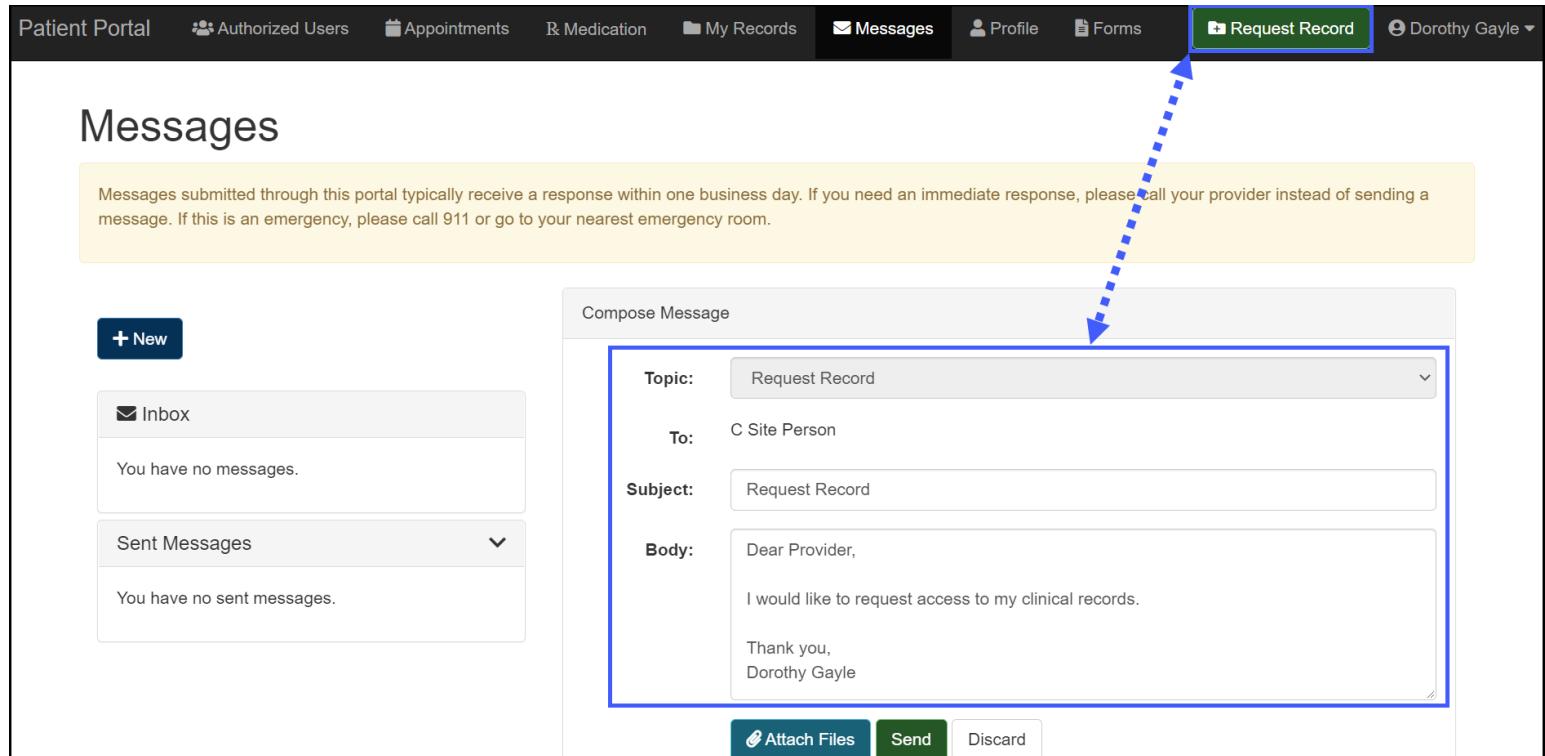
Patient Portal Authorized Users Appointments Medication My Records Messages Profile Forms **Request Record** Dorothy Gayle ▾

Patient Portal

To access your medical record, click on My History in the navigation bar at the top of the screen.

To send a secure message to your provider, or to read a message sent to you by your provider, click on Messages in the top navigation bar.

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



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

To: C Site Person

Subject: Request Record

Body:

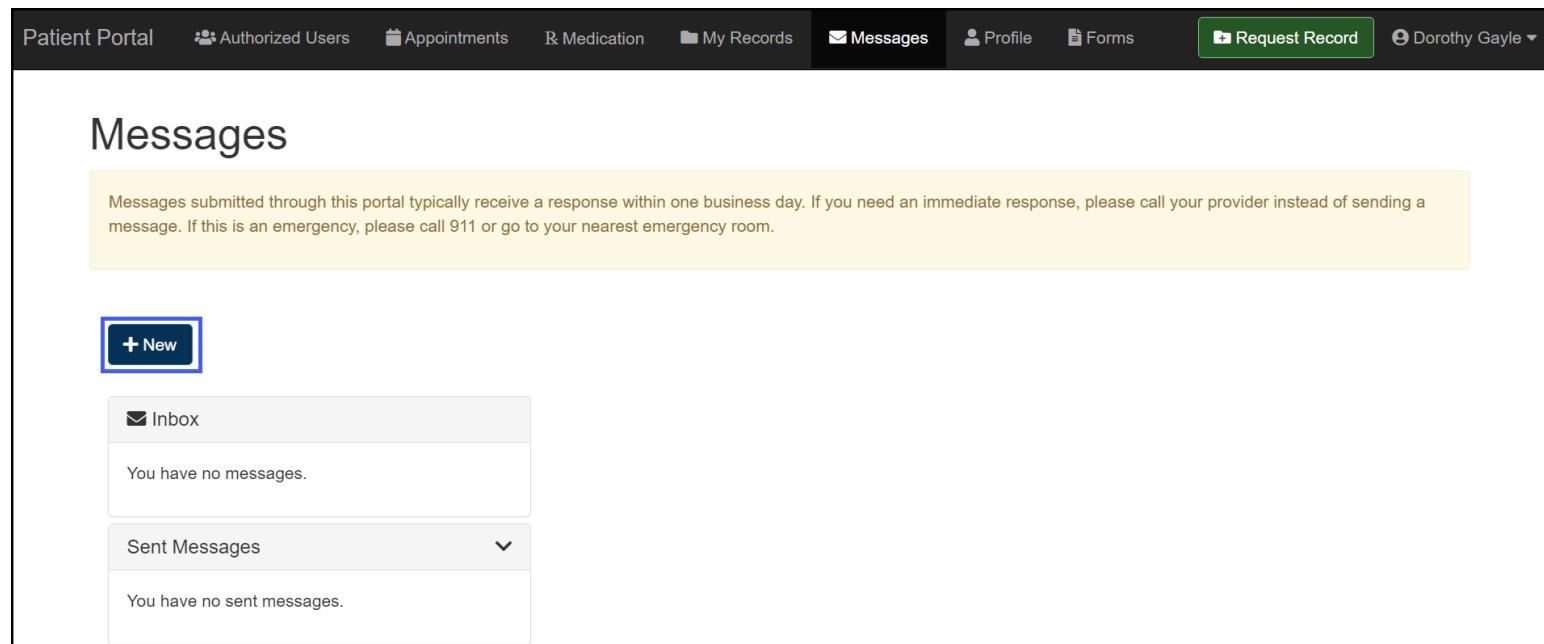
Dear Provider,

I would like to request access to my clinical records.

Thank you,
Dorothy Gayle

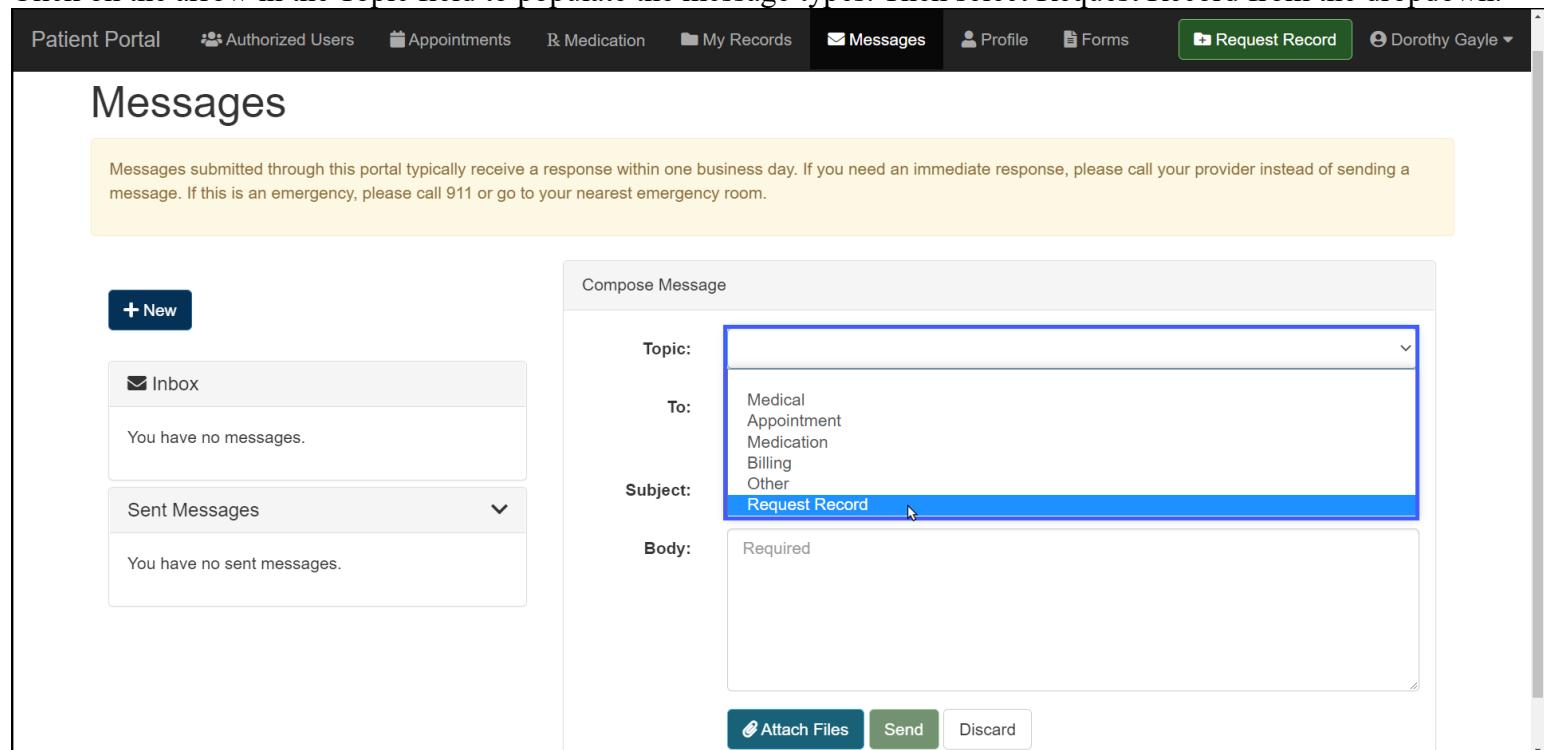
Attach Files Send Discard

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



The screenshot shows the 'Messages' tab in the Patient Portal. At the top, there is a navigation bar with links: Patient Portal, Authorized Users, Appointments, Medication, My Records, Messages (which is the active tab), Profile, Forms, Request Record, and a user profile for Dorothy Gayle. Below the navigation bar, the title 'Messages' is displayed. A message box at the top right states: '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.' On the left, there is a '+ New' button. Below it are two sections: 'Inbox' and 'Sent Messages'. The 'Inbox' section shows the message 'You have no messages.' The 'Sent Messages' section shows the message 'You have no sent messages.'

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



The screenshot shows the 'Messages' tab in the Patient Portal, similar to the previous one. The 'Topic' dropdown in the 'Compose Message' form is open, showing a list of options: Medical, Appointment, Medication, Billing, Other, and Request Record. The 'Request Record' option is highlighted with a blue border. The other fields in the form are empty: 'To:' and 'Subject:' are not filled, and the 'Body:' field contains the placeholder 'Required'. At the bottom of the form are buttons for 'Attach Files', 'Send', and 'Discard'.

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

Patient Portal

Authorized Users

Appointments

R Medication

My Records

Messages

Profile

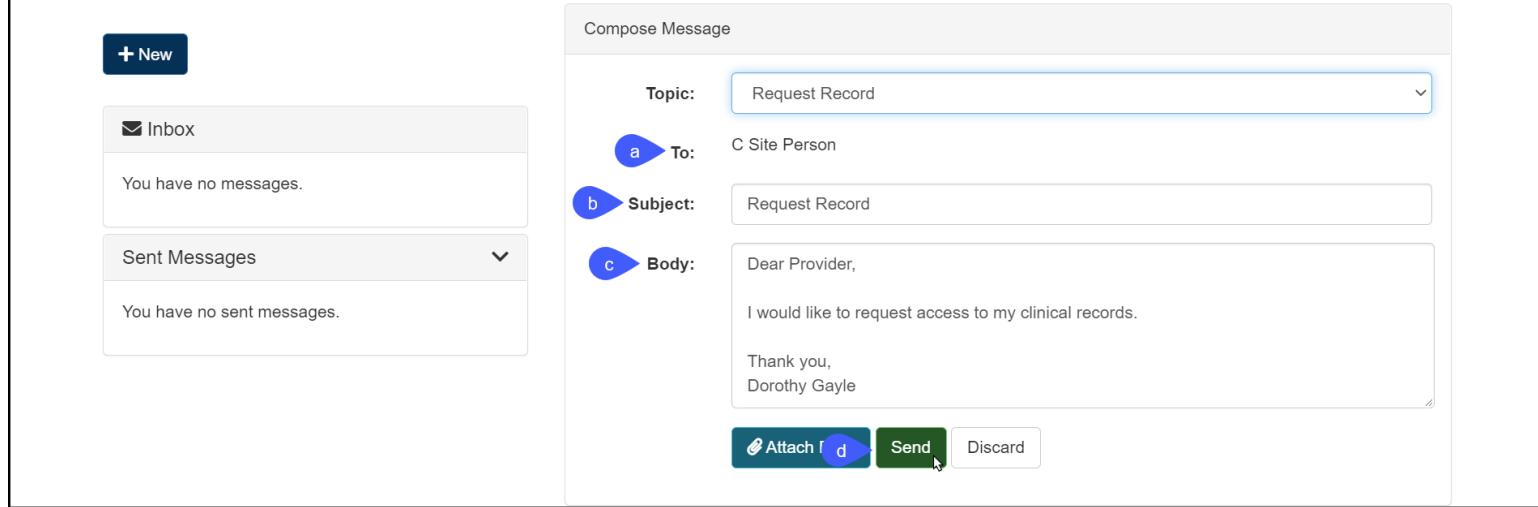
Forms

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.



The screenshot shows a 'Compose Message' window. On the left, there's a sidebar with a '+ New' button, an 'Inbox' section (empty), and a 'Sent Messages' section (empty). The main window has fields for 'Topic' (set to 'Request Record'), 'To' (set to 'C Site Person'), 'Subject' (set to 'Request Record'), and 'Body' (containing a message about requesting access to clinical records). At the bottom are buttons for 'Attach' (with a 'd' icon), 'Send' (highlighted in green), and 'Discard'.

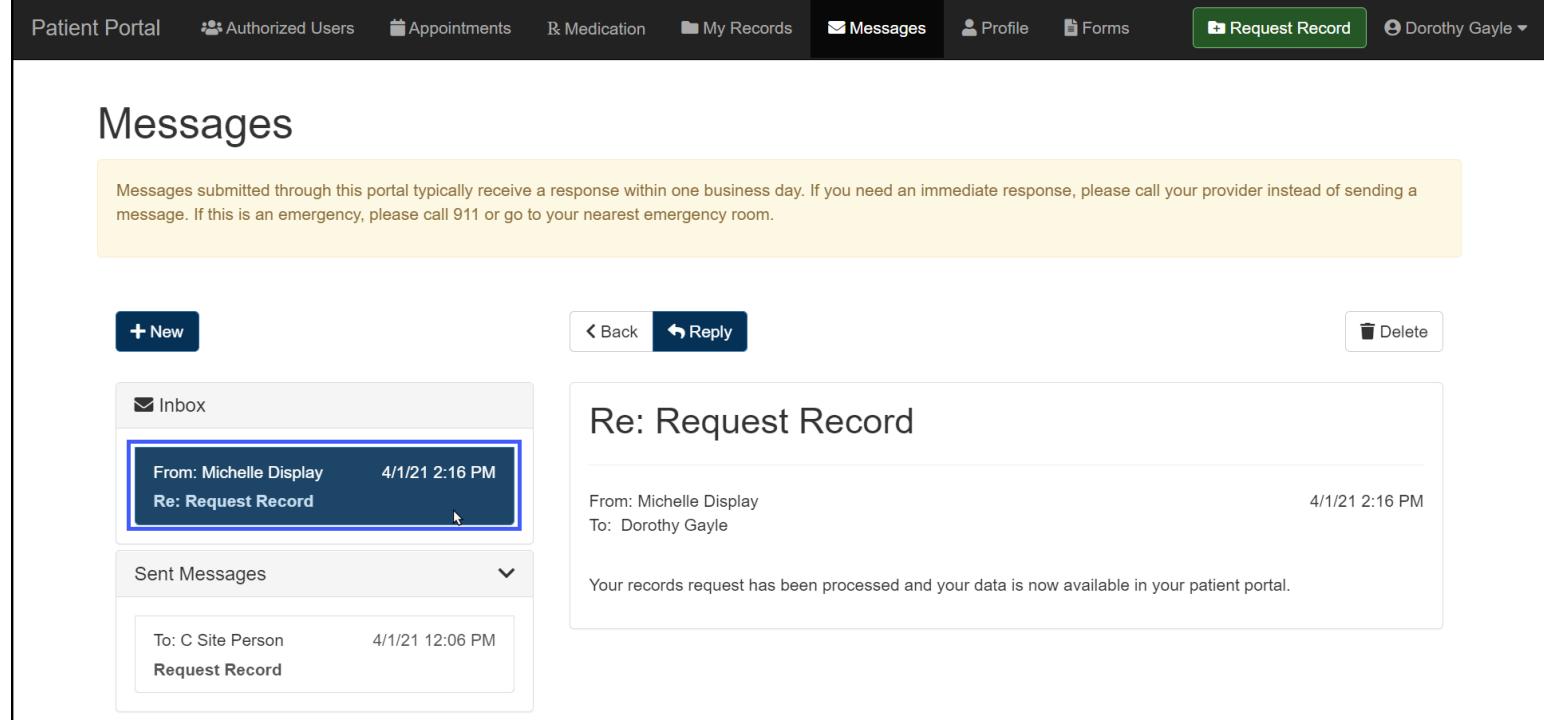
- a) If the practice has set up a default recipient they will populate here, otherwise you will have the option to select a recipient.
- b) The subject of the message will auto populate as shown. You are able to change this text.
- c) The body of the message will auto populate as shown. You are able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



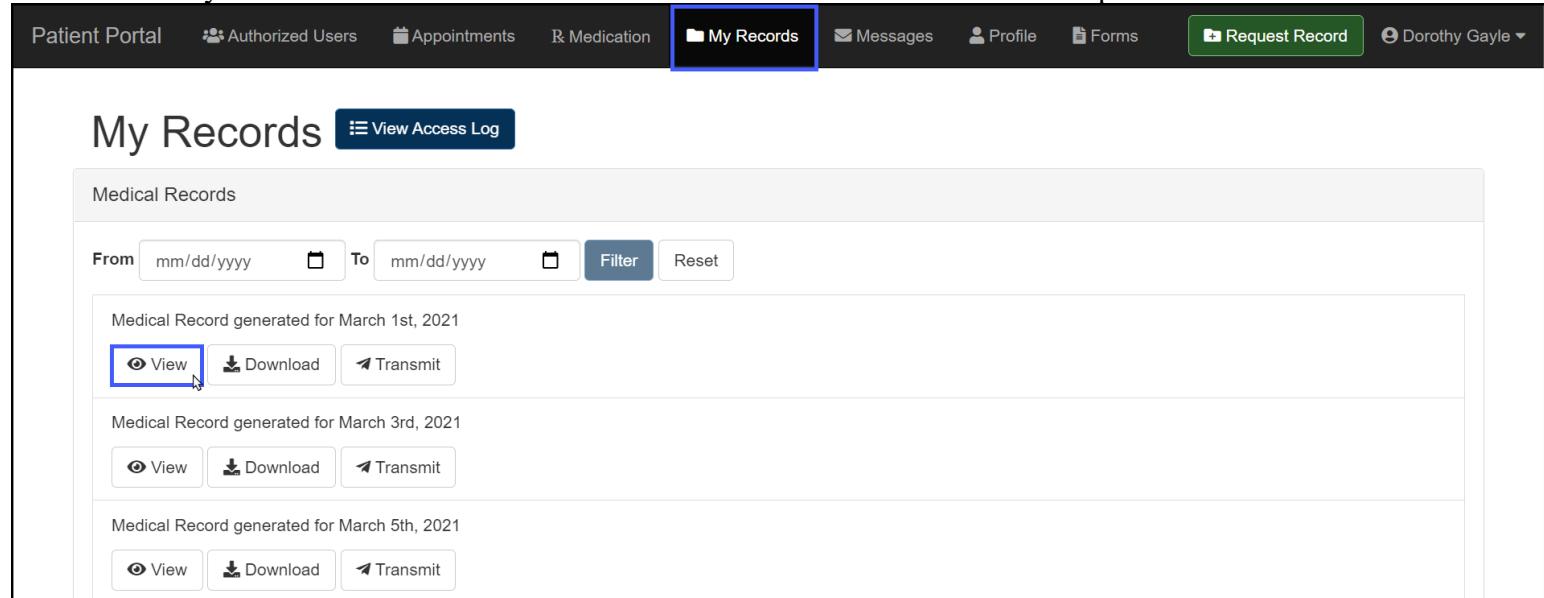
Your provider or the person designated to receive these requests on behalf of the practice will be sent a message requesting access to your records for you.

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



The screenshot shows the 'Messages' section of the Patient Portal. At the top, there are navigation links: Patient Portal, Authorized Users, Appointments, R Medication, My Records, Messages (which is the active tab), Profile, Forms, Request Record, and a user profile for Dorothy Gayle. A message box at the top right states: '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.' Below this, there are buttons for '+ New', 'Back', 'Reply', and 'Delete'. The main area shows an inbox with one message highlighted: 'From: Michelle Display 4/1/21 2:16 PM Re: Request Record'. Below the inbox, there is a list of 'Sent Messages' with one entry: 'To: C Site Person 4/1/21 12:06 PM Request Record'. The message content on the right shows the email body: 'From: Michelle Display To: Dorothy Gayle 4/1/21 2:16 PM 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.



The screenshot shows the 'My Records' section of the Patient Portal. At the top, there are navigation links: Patient Portal, Authorized Users, Appointments, R Medication, My Records (which is the active tab), Messages, Profile, Forms, Request Record, and a user profile for Dorothy Gayle. A button for 'View Access Log' is also present. The main area is titled 'Medical Records' and shows three entries, each with a 'View' button highlighted with a blue box. The entries are: 'Medical Record generated for March 1st, 2021', 'Medical Record generated for March 3rd, 2021', and 'Medical Record generated for March 5th, 2021'. Each entry has 'View', 'Download', and 'Transmit' buttons.

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

[Patient Portal](#)[Authorized Users](#)[Appointments](#)[Medication](#)[My Records](#)[Messages](#)[Profile](#)[Forms](#)[Request Record](#)[Dorothy Gayle ▾](#)

My Records

[View Access Log](#)

Medical Records

From To

Medical Record generated for March 1st, 2021

[Close](#)[Download](#)[Transmit](#)

Summarization of Episode Note

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