## MEDICONNECT – REQUESTING MEDICAL RECORDS ONLINE
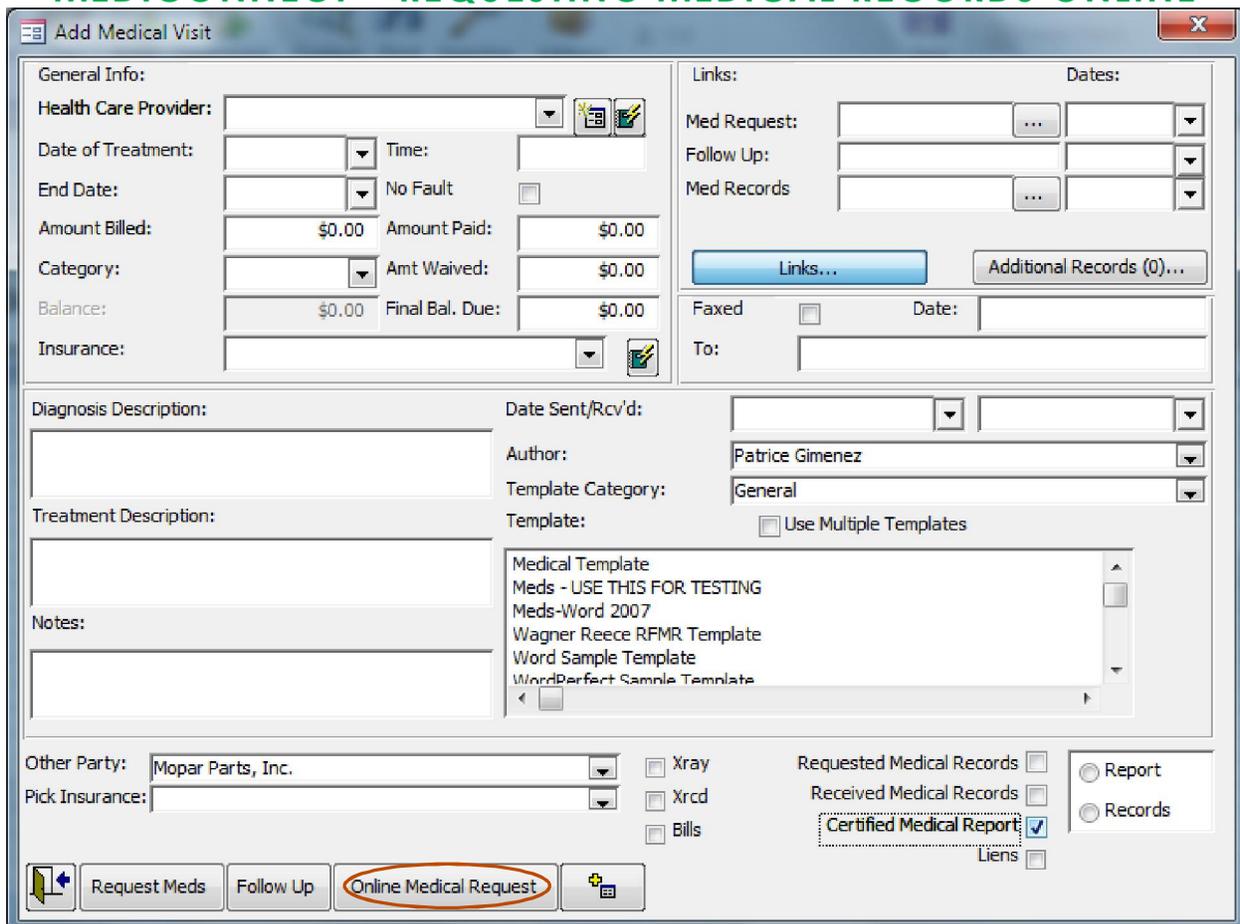


- In the Medical Visit window, choose the name of the healthcare provider and the date of treatment. Add any notes regarding your request.

- Click on the Online Medical Request button.

- A window appears allowing the user to choose the action required.

○ Choose Request Records

Request Records...
Add Note...
View Notes...
Check Status...
Check All Requests...
Cancel Request...
Close This Menu

- A prompt to include a scanned medical authorization appears. (A copy of your client's signed medical authorization form should be scanned, saved and attached on the Clients Tab. If you do not have scanning capabilities, you can fax a copy of the medical authorization form to MediConnect.).

**TrialWorks** ✕

Send Scanned Medical Authorization with Request?

[ Yes ]    [ No ]    [ Cancel ]

- Clicking on the Yes button, the user is prompted to choose the appropriate medical authorization form for this request.

- A prompt to choose a user to receive status emails on the records request. If the drop-down list is blank, an email address was not entered on the User table.
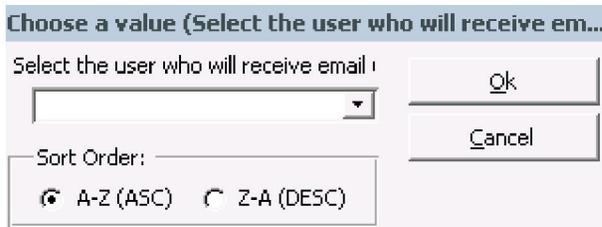
**Choose a value (Select the user who will receive em...**

Select the user who will receive email

[                    ▼ ]        [ Ok ]

                                [ Cancel ]

Sort Order:
⦿ A-Z (ASC)    ○ Z-A (DESC)

- Indicate the Dates (time period) for the records request, the type of records being requested (Medical or Billing) and any special instructions. (A medical and billing request may be classified as two separate requests because documents are not maintained in the same facility. TrialWorks will create a separate request for tracking purposes.) Choose any additional services necessary by checking the box for the required service.

○ Dates. The time period for the records request. Values in the drop-down list are last 2 years, last 5 years or any and all. The user can manually enter a specific time frame if needed.

○ Record Type. A description of the type of records requests. Values in the drop-down list are Medical, Billing, Claims, X-Ray, Medical & Billing. If the user chooses Medical & Billing, because MediConnect may consider this to be two different requests, TrialWorks will automatically create a duplicate entry for the Billing portion of the request.

○ Intended Use. A description of the intended use for the documentation received. Values in the drop-down list are Healthcare, Insurance, Litigation, Underwriting and Workers Compensation.

○ Email checkbox. An indication that the user would like to receive update emails. If checked, the user whose name was entered in the initial Email window will be updated with the status of the request from MediConnect.

○ Level of Service. A choice for the level of service the request is made. Levels of service are Silver, Gold and Platinum. The level of service determines the level of attention the request is followed up on by MediConnect. Gold is the default level of service for most accounts.

- Page Stamp. Similar to Bates stamping to identify each page of your document.

- Sorting/Indexing. Sorting the medical records in chronological order.

- Certify. Legal certification by the medical provider as to the completeness of the medical records.

- Paper Copies. A physical copy of the medical records received from the medical provider.

- CDP (Comprehensive Discovery Package). A discount package including page stamp, sorting/indexing and paper copies.

- Include Archived Records. An indication that the records are in archive at MediConnect from a previous request.

- Click OK and the Status window will provide information regarding the records request transfer.
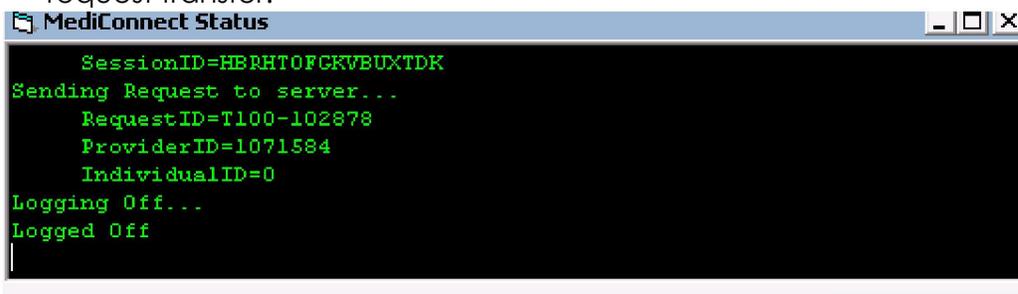


- Once all required information has been sent, you will see Logged Off in the Status window. You have now been disconnected from MediConnect. The Status window will close in approximately 20 seconds or you can click on the Close button.

- A link to the medical records request is now placed in the MedRequest box located in the upper right-hand corner of the Medical Detail window and today's date is added. The Request was assigned a request ID number. This number will appear on the invoice you receive from MediConnect. You are unable to edit the request once completed. Additional notes can be added at any time through the Add Notes feature.

## MediConnect - Checking the Status of an Online Records Request

- After records have been requested, a user can check the status of those records within 24 hours. Open the Medical Detail window by double-clicking on the provider name for the request.

- Click on the Online Medical Request button and choose Check Status

  The MediConnect Status window appears

- TrialWorks will generate an e-mail message to advise the user of the status of the current request.

- If MediConnect has asked for additional information, the Notes window will appear. Click on the individual dates to read the note.

- If MediConnect requires additional information, click on the Online Medical Request button and choose Add a Note. Provide any necessary information.

## MediConnect - Cancelling a Request for Online Medical Records

To cancel a request for records from MediConnect, open the Medical Detail window for the request you wish to cancel.

- Click on the Online Medical Request button and choose Cancel Request.

  The cancellation window appears

- Enter the reason for cancelling the request and click on the OK button. The cancellation request is sent to MediConnect and can be seen in the Status window.

NOTE: There may be fees associated with cancelling a request.



**Contact TrialWorks Tech Support**
800.377.5844 or techsupport@trialworks.com

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