



ABT Medical, Inc.

User Guide



ROI+

Version 1.0

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ROI Requests Tab - Query

The screenshot displays the ROI+ system interface. At the top, a navigation bar includes buttons for Dashboard, Hide Query, Create New Request, Help, Admin, and Logout. Below this is a tabbed interface with ROI Requests, Requestors, Patients, Payment, and Audit. The ROI Requests tab is active, showing a search area for 'P0000-0 ABT Health, Inc.' with a '>>NEXT' link. A 'Patient Quick Search - 8' section allows filtering by first letter (A-Z) or 'ALL'. The main search area contains multiple filters: RequestID, Requestor, Request Date, Invoice Number, Invoice/Complete Date, Request Status, Patient Name, Patient MRN, Patient DOB, Date Paid, Paid Status, Optional Reference, Request Type, Billing Type, Delivery Type, and Record Type. At the bottom, there are controls for Results Per Page (50), Sort Value (RequestID), and buttons for Search, Export, and Clear. Sorting options are set to 'asc' (ascending).

1. Dashboard - view summary screen of all fulfillment activity
2. Hide/Show Query - hide the search area; click again to unhide (show) the search area
3. Create New Request - log in a new request
4. Help - view User Help Guide
5. Admin - manage access privileges and other system configurations
6. Logout - exit ROI+ system when you are finished
7. ROI Requests tab - manage, review, and search for requests
8. Requestors tab - add and edit Requestors in Requestor database
9. Patients tab - add and edit Patients in Patient database
10. Payment tab - post payments and manage fee collections
11. Audit tab - review permanent detail regarding all activity in system
12. Account and Name of Provider - specifies the account/Provider you are logged in to
13. NEXT - link to CMS/esMD tab and View mode for users with access
14. Patient Quick Search - search by clicking first letter of Patient's last name or click ALL to display all Patients
15. RequestID - search entries by Request ID number
16. Requestor - search entries by name of Requestor
17. Request Date - search using Calendar(s) to specify Request Date or date range
18. Invoice Number - search entries by Invoice Number
19. Invoice/Complete Date - search using Calendar(s) to specify Invoice/Complete Date or date range
20. Request Status - search entries by Request Status, such as Complete and Viewed
21. Patient Name - search entries by Patient name
22. Patient MRN - search entries by Patient's Medical Record Number
23. Patient DOB - search entries by Patient's date of birth
24. Date Paid - search entries by date Invoice was paid using Calendar to specify date(s)
25. Paid Status - search entries by paid status (Paid, UnPaid, or Unpaid - viewable)
26. Optional Reference - search entries by descriptor(s) assigned to the request by user
27. Request Type - search entries by Type of Request, such as Continuing Care or Legal
28. Billing Type - search entries by Billing Type, such as Billable, Non-Billable, or Disability
29. Delivery Type - search entries by Delivery Type, such as Fax, Paper, or Web
30. Record Type - specify type of records to search (Active Only, Archived Only, Active & Archived, Rejected Active, or Rejected Archived)
31. Results Per Page - specify number of results to display per page
32. Sort Value - choose how to sort results, such as by Patient Name or Request Date.
33. Search - click "Search" button after you specify what you want to search on in one or more of the search fields
34. Export - save search results as .csv file to view in a spreadsheet such as Excel
35. Clear - click to clear all search fields from previous search
36. Ascending/Descending - click "asc" to see results in ascending order (1, 2, 3 or A, B, C) or "desc" to see them in descending order (3, 2, 1 or Z, Y, X) for the Sort Value chosen
37. Check boxes - if the box next to a field is checked, that field will appear in the results list

ROI Requests Tab - Results

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
Ref	Action	Notes	Form		RequestID		Request Status	Request Date	Optional Reference	Requestor	Patient Name	Patient DOB	Invoice Number	Invoice/Complete Date	Invoice Amount	Billing Status	Paid Status	Date Paid	Patient MRN	
1	action		view	!	REQ20150430055648357 +		Complete	4/30/2015		CIS	Smith,Jack	12/4/1942	IN20150430055648357 +	4/30/2015	\$45.00	Billable	UnPaid		CTHC_25175	
2	action		view		REQ20150423112653252 +		Incomplete	4/23/2015		ABT Vault	Burton,Chip	10/11/1952	IN20150423112653252 +	4/23/2015	\$0.00	Non Billable	UnPaid - viewable		111111	
3	action		view		REQ20150421085349952 +		Incomplete	4/21/2015	ref123	ABT Vault	Burton,Chip	10/11/1952	IN20150421085349952 +	4/21/2015	\$15.00	Billable	UnPaid		333333333	
4	action		view		REQ20150420144224497 +		Logged	4/20/2015	test 123, test 321	ABT Vault	Burton,Chip	10/11/1952	IN20150420144224497 +	4/20/2015	\$0.00	Billable	UnPaid		333333333	
5	action		view		REQ20150420144443431 +		Incomplete	4/20/2015		ABT Vault	Burton,Chip	10/11/1952	IN20150420144443431 +	4/20/2015	\$0.00	Billable	UnPaid		333333333	
6	action		view	!	REQ20150418073228566 +		Notified	4/18/2015		ABT Vault	Manske,Steve	1/9/1945	IN20150418073228566 +	4/18/2015	\$28.00	Billable	Paid	5/21/2015	911111	
7	action		view	!	REQ20150418093935697 +		Complete	4/18/2015		ABT Vault	Burton,Chip	10/11/1952	IN20150418093935697 +	4/18/2015	\$0.00	Billable	Paid	10/13/2015	111111	
8	action		view	!	REQ20150130111831883 +		Complete	1/30/2015		ABT Vault	Burton,Chip	10/11/1952	IN20150130111831883 +	2/3/2015	\$58.50	Billable	Paid	4/23/2015	333333333	
9	action		view		REQ20150127182540982 +		Incomplete	1/27/2015		Patient	Burton,Chip	10/11/1952	IN20150127182540982 +	1/27/2015	\$25.00	Billable	UnPaid		111111	
10	action		view		REQ20150123075148100 +		Logged	1/23/2015		Patient	Burton,Chip	10/11/1952	IN20150123075148100 +	1/23/2015	\$0.00	Billable	UnPaid		111111	
11	action		view		REQ20150123091634421 +		Incomplete	1/23/2015		ABT Vault	Burton,Chip	10/11/1952	IN20150123091634421 +	1/23/2015	\$36.00	Billable	UnPaid		111111	
12	action		view	!	REQ20141219084702454 +		Complete C	12/19/2014		Patient	Burton,Chip	10/11/1952	IN20141219084702454 +	1/13/2015	\$25.00	Billable	UnPaid		111111	

1. Ref - click line number to edit the existing request
2. Action - click "action" to **archive**, **un-archive**, **reject**, or **un-reject** a request
3. Notes - click "pen" icon to open notes window and view or write a note; after entering a note and refreshing the screen, the "pen" icon becomes a "note" icon
4. Form - click "view" to see Request Fulfillment Notification Form
5. Exclamation Point - color-coded notification indicator showing fax delivery status (see color code list); click "!" to view brief log of fax activity, including type of fax and fax # used for the Invoice and Request Fulfillment Notification
6. RequestID - click the request identification (ID) # to view uploaded files, access QC (see color code list)
7. Plus sign - click "+" to select requested files from the Patient archive or upload requested files from desktop
8. Request Status - indicates current request status (**Incomplete**, **Complete**, **Logged**, **Notified**, **Rejected**, **Viewed**)
9. Request Date - the date a new request was created (logged)
10. Optional Reference - optional descriptor(s) assigned to a request by the user to help search for the request or post payment
11. Requestor - the name of the entity that submitted the request for records to you
12. Patient Name - the name of the Patient whose records have been requested
13. Patient DOB - the date of birth of the Patient whose records have been requested
14. Invoice Number - click the Invoice Number assigned by the system to view the Invoice you sent to the Requestor
15. Plus sign - click "+" to edit/update the Invoice
16. Invoice/Complete Date - the date the request was marked complete (and the Requestor notified) or the date the Invoice was subsequently modified/updated
17. Invoice Amount - the dollar amount owed by the Requestor, as reflected on the Invoice
18. Billing Status - indicates the type of billing (**Billable**, **Non Billable**, **Disability**, **Disability-Non Billable**, or **Undefined**)
19. Paid Status - indicates the payment status of the Invoice (**Paid**, **UnPaid**, or **Unpaid - viewable**)
20. Date Paid - the date a Requestor's payment is logged into the system as "Paid"
21. Patient MRN - the Medical Record Number assigned to a Patient by the Healthcare Provider

COLOR CODES - "!" Notification Indicators (Item 5)

Red - Delivery was not successful.

Yellow - Delivery is pending.

Green - Delivery was successful.

COLOR CODES - Request ID Numbers (Item 6)

Red - No request files have been uploaded. Request Status is Logged.

Yellow - One or more request files have been uploaded. Request Status is Incomplete.

Green - All necessary request files have been uploaded, but the Request Fulfillment Notification has not been sent yet. Request Status is Complete.

Brown - The Request Fulfillment Notification has been sent to the Requestor. Request Status is Notified.

Blue - The Requestor has viewed the requested medical records. Request Status is Viewed.

Log New ROI Request

Log New ROI Request

ROI Request Information

1 Provider:

2 Request Type: [Request Type Help?](#)

3 Patient Name: [Add new patient](#)

4 Requestor: [Add new requestor](#)

5 Contact: [Add new contact](#)

6 **ALERT: Current Requestor on Credit Hold**

7 Fax Number:
(nnn) nnn-nnnn WARNING: Sending Patient records to an incorrect fax # is a breach of Patient confidentiality!!! Are you sending this Request package to the correct fax #? Compare the fax # here to the fax # on the original Request document.

8 Dates of Service: From To
mm/dd/yyyy

9 Optional Reference:

10 Billing Type:

11 ☐ Include the Invoice as the first page in the Request Release

12 Delivery Type:

13 **Request Summary Information**
Request Type: Legal (Attorney)
Patient: Burton,Chip - 10/11/1952
Requestor: ABT Vault

14

15

16

17

Be advised that the Requestor contact information contained in the PHI REQUEST FULFILLMENT NOTIFICATION is originated by Providers, not ABT Global, Inc. Thus, ABT Global, Inc. makes no guarantee as to the accuracy of the Requestor contact information contained in the PHI REQUEST FULFILLMENT NOTIFICATION. By generating the PHI REQUEST FULFILLMENT NOTIFICATION, you agree that confirming the accuracy of all Requestor contact information contained therein remains your sole responsibility as a Provider and that ABT Global, Inc. is not responsible for any errors or omissions in Requestor contact information, whether or not that information is relied upon by you or other Providers.

1. Provider - name of Provider; Subprovider options are listed, if applicable
2. Request Type - pull-down menu with the following Request Type options:

Audit	Law Enforcement
Business Office	Legal (Attorney)
Certified	Medicare - Medicaid
Continuing Care	Patient
Disability Determination Services	Peer Review
Disability Non-DDS	Radiology
EMSI	Risk Management
Fax Continuing Care	Services
Government Agencies	Subpoena/Court Order
Hospital Departments - Other	Worker's Comp
In-House	Other (Misc., etc.)
Insurance	
3. Patient Name - name of Patient whose records are being requested. If Patient is not in the drop-down search list, use "Add new patient."
4. Requestor - name of Requestor who submitted a request for records. If Requestor is not in the drop-down search list, use "Add new requestor."
5. Contact - name of the Requestor's Contact Person. If Contact is not listed in the pull-down menu, use "Add new contact."
6. Credit Hold Alert - alert is shown here if you select a Requestor who has one or more requests on Credit Hold for non-payment.
7. Fax Number - Requestor's fax # for delivery of medical records (fills in automatically if the Requestor or Contact is already in the database)
8. Dates of Service - beginning and end dates of service specified in request
9. Optional Reference - an optional field to enter request-related information
10. Billing Type - pull-down menu with the following Billing Type options:
 - Billable - UnPaid
 - Non-Billable - Release for Viewing
 - Disability - Release for Viewing
 - Disability - Non-Billable Release for Viewing
11. Include Invoice - check box to add Invoice as first page of request package
12. Delivery Type - pull-down menu with the following Delivery options:
 - CD/DVD
 - Email
 - Fax
 - Paper
 - Web (default)
13. Request Summary Information - displays a quick review of data
14. Save & Log Another Request - button saves current request and brings up a new form for the next request to be logged
15. Save & Go to Upload - button saves request and goes to Upload screen
16. Save & Exit to Result List - button saves request and returns to Result List
17. Exit Without Saving - button cancels request and returns to the Result List

Payment Tab - Query

The screenshot shows the ROI+ Payment Tab Query interface. At the top, there is a navigation bar with tabs: ROI Requests, Requestors, Patients, Payment, and Audit. The 'Payment' tab is selected. To the right of the tabs are links for 'Admin' and 'Logout'. Below the tabs, the user's account information is displayed: 'P0000-0 ABT Health, Inc.' and a '>>NEXT' link. A 'Click for Help' link is also present. The main search area contains several fields with dropdown menus and checkboxes. The fields are: Patient (CONTAINS), Invoice Amt (EQUALS), Invoice Date (EQUALS), Billing Type (EQUALS), Aging (Any), Paid Status (Unpaid), Requestor (CONTAINS), Invoice Number (CONTAINS), Paid Date (EQUALS), SSA REQID (BEGINS WITH), Payment Type (Any), Optional Ref (CONTAINS), and Record Type (Active Only). There are also fields for Results Per Page (50), Sort Value (Patient), and buttons for Search, Export, and Clear. A checkbox for 'Virtual Terminal for CC Payment' is also visible. The interface is annotated with numbered callouts from 1 to 32, pointing to various elements.

1. ROI Requests tab - manage, review, and search for requests
2. Requestors tab - add and edit Requestors in Requestor database
3. Patients tab - add and edit Patients in Patient database
4. Payment tab - post payments and manage fee collections
5. Audit tab - review permanent detail regarding all activity in system
6. Hide/Show Query - click to hide search area; click again to unhide (show) search area
7. Admin - manage access privileges and other system configurations
8. Logout - exit ROI+ system when you are finished
9. Account and Name of Provider - specifies the account/Provider you are logged in to
10. NEXT - link to CMS/esMD tab and View mode for users with access
11. Help - view User Help Guide for Payment Tab, including Credit Hold instructions
12. Patient - search entries by Patient name
13. Invoice Amt - search entries by the dollar amount owed for a request fulfillment
14. Invoice Date - search entries using Calendar(s) to specify Invoice Date/date range
15. Billing Type - search entries by Billing Type (Billable, Non Billable, Disability, Disability-Non Billable, or Any)
16. Requestor - search entries by name of Requestor
17. Invoice Number - search entries by Invoice Number
18. Paid Date - search entries using Calendar(s) to specify Paid Date/date range
19. SSA REQID - search Disability requests using Social Security REQID identifier
20. Aging - search entries by the age of the Invoice (i.e., # of days since the Invoice was sent to the Requestor)
21. Payment Type - search entries by method of payment (Check, Cash, Credit Card, or Any) or by "Credit Hold" status
22. Optional Ref - search entries by descriptor(s) assigned to the request by user
23. Paid Status - search entries by Paid Status (Unpaid, Unpaid-Viewable, Paid, or Any)
24. Record Type - search by type of record (Active Only, Archived Only, Active & Archived, Rejected Active, or Rejected Archived)
25. Virtual Terminal for CC Payment - take credit card payments using Authorize.Net
26. Results Per Page - specify number of results to display per page
27. Sort Value - choose how to sort your search results (Patient, Requestor, Invoice Amt, Invoice Number, Invoice Date, Billing Type, Aging, or Payment Type)
28. Ascending/Descending - click "asc" to see results in ascending order (1, 2, 3 or A, B, C) or "desc" to see them in descending order (3, 2, 1 or Z, Y, X) for the Sort Value chosen
29. Search - click "Search" button after you specify what you want to search on in one or more of the search fields
30. Export - save search results as a .csv file to view in a spreadsheet such as Excel
31. Clear - click to clear all search fields from previous search
32. Check boxes - if the box next to a field is checked, that field will appear in the results list

Payment Tab - Results

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Ref	Notes	Payment	Patient	Invoice Amt	Invoice Date	Aging	Requestor	Invoice Number	Request Type	Status	Paid Status	Paid Date	Billing Type	Payment Type	SSA REQID	Optional Reference
1		Payment Option <input type="button" value="Select Payment Option"/>	Burton,Chip (10/11/1952)	\$46.00	8/26/2015	48	ABT Vault	IN20150825091208640	Insurance	Complete	UnPaid		Billable	None	---	
2		Payment Option <input type="button" value="Select Payment Option"/>	Burton,Chip (10/11/1952)	\$25.00	8/26/2015	48	Patient	IN20150826112646588	Patient	Complete	UnPaid		Billable	None	---	
3		Payment Option <input type="button" value="Select Payment Option"/>	Burton,Chip (10/11/1952)	\$66.00	9/3/2015	40	ABT Vault	IN20150903045226649	Audit	Complete	UnPaid		Billable	None	---	
4		Payment Option <input type="button" value="Select Payment Option"/>	Burton,Chip (10/11/1952)	\$25.00	9/8/2015	35	ABT Vault	IN20150908121052852	Insurance	Complete	UnPaid		Billable	None	---	
5		Payment Option <input type="button" value="Select Payment Option"/>	Burton,Chip (10/11/1952)	\$46.00	9/23/2015	20	ABT Vault	IN20150915090524874	Insurance	Complete	UnPaid		Billable	None	---	
6		Payment Option <input type="button" value="Select Payment Option"/>	Harrington,Charles (4/22/1950)	\$41.00	8/26/2015	48	CIS	IN20150812123820469	Audit	Complete	UnPaid		Billable	None	---	
7		Payment Option <input type="button" value="Select Payment Option"/>	Manske,Steve (1/9/1945)	\$0.00	9/7/2015	36	ABT Vault	IN20150905204225345	None	Complete	UnPaid		Billable	None	---	
8		Payment Option <input type="button" value="Select Payment Option"/>	Manske,Steve (1/9/1945)	\$42.00	10/1/2015	12	ABT Vault	IN20151001071939199	Certified	Complete	UnPaid		Billable	None	---	5469,77802

1. Ref - the line number for each entry
2. Notes - click "pen" icon to open notes window and view or write a note; after entering a note and refreshing the screen, the "pen" icon becomes a "note" icon
3. Payment - two-step process for recording payments in the ROI+ system. After selecting a Payment Option from the pull-down menu (**Check**, **Credit Card**, **Cash**, **Credit Hold**, **Release for Viewing**, or **Set to UnPaid**), click the resulting "Set to Paid" button immediately to the right.
4. Patient - the name and date of birth of the Patient whose records have been requested. Clicking here opens the fulfilled request file.
5. Invoice Amt - the dollar amount owed by the Requestor, as reflected on the Invoice
6. Invoice Date - the date the request was marked complete (and the Requestor notified) or the date the Invoice was subsequently modified/updated
7. Aging - # of days since the Invoice was sent to the Requestor
8. Requestor - the name of the entity that submitted the request for records to you
9. Invoice Number - click the Invoice Number assigned by the system to view the Invoice you sent to the Requestor
10. Request Type - indicates the type of request submitted (such as **Audit**, **Continuing Care**, **Disability Determination Services**, **Disability Non-DDS**, **EMSI**, **Government Agencies**, **Insurance**, **Legal**, **Patient**, **Services**, **Subpoena/Court Order**, or **Workers Comp**)
11. Status - indicates current request status (**Logged**, **Incomplete**, **Complete**, **Notified**, **Viewed**, or **Rejected**)
12. Paid Status - indicates the payment status of the Invoice (**UnPaid**, **Unpaid-Viewable**, or **Paid**)
13. Paid Date - the date a Requestor's payment is logged into the system as "Paid"
14. Billing Type - indicates the type of billing (**Billable**, **Non Billable**, **Disability**, or **Disability-Non Billable**)
15. Payment Type - indicates the method of payment or other payment-related status (**Check**, **Cash**, **Credit Card**, **Credit Hold**, **Release**, or **None**)
16. SSA REQID - REQID identifier assigned by Social Security to a Disability request
17. Optional Reference - optional descriptor(s) assigned to a request by the user to help search for the request or post payment

CHAPTER 1.0

PROCESSING A NEW REQUEST

The purpose of **Logging a New Request** is to log the request document that you received from a requesting entity (known as a Requestor) into the ROI+ system for date/time stamp and processing.

You will enter the following data into the **Log New Request** form:

- Request Type
- Patient Name
- Requestor Name
- Requestor Contact
- Dates of Service
- Optional Reference (e.g., Case #)
- Billing Type
- Delivery Method

[Log New ROI Request](#)

ROI Request Information

Provider:

Request Type: [Request Type Help?](#)

Patient Name: [Add new patient](#)

Requestor: [Add new requestor](#)

Contact: [Add new contact](#)

Fax Number: (nnn) nnn-nnnn
WARNING: Sending Patient records to an incorrect fax # is a breach of Patient confidentiality! Are you sending this Request package to the correct fax #? Compare the fax # here to the fax # on the original Request document.

Dates of Service:
mm/dd/yyyy

Optional Reference:

Billing Type: [Include the Invoice as the first page in the Request Release](#)

Delivery Type:

Request Summary Information
Request Type: None
Patient:
Requestor:

[Save & Log Another Request](#) [Save & Go to Upload](#) [Save & Exit to Result List](#) [Exit Without Saving](#)

Be advised that the Requestor contact information contained in the PHI REQUEST FULFILLMENT NOTIFICATION is originated by Providers, not ABT Global, Inc. Thus, ABT Global, Inc. makes no guarantee as to the accuracy of the Requestor contact information contained in the PHI REQUEST FULFILLMENT NOTIFICATION. By generating the PHI REQUEST FULFILLMENT NOTIFICATION, you agree that confirming the accuracy of all Requestor contact information contained therein remains your sole responsibility as a Provider and that ABT Global, Inc. is not responsible for any errors or omissions in Requestor contact information, whether or not that information is relied upon by you or other Providers.

One important result of your work on the Log New ROI Request form is the **PHI Request Fulfillment Notification**, which will be sent electronically to the Requestor to notify them that their request has been fulfilled and how they can access the results on the **ROI+ Requestor Portal**.

The Notification contains the following data about the original request:


- Requestor Name, Contact Name, Address, Phone #, Fax #
- Requestor Account # and PIN for ROI+ Web Portal security validation
- Provider Name, Provider Contact Name, Address, Phone #, Fax #
- Patient Name and any Patient identifiers
- Instructions for the Requestor on how to access the ROI+ Requestor Web Portal

Continue reading for step-by-step instructions on how to enter a new request into the ROI+ system.

ROI Plus

YOUR OFFICE HAS REQUESTED A PHI FOR THE PATIENT LISTED BELOW

PHI REQUEST FULFILLMENT NOTIFICATION


REQ20150130111831883

Request Date: 1/30/2015	Request ID: REQ20150130111831883
Requestor Name: ABT Vault	Patient Name: Burton, Chip
Requestor Acct: R10068	Patient DOB: xx/xx/xxxx
Requestor PIN: 5445	Patient MRN: 333333333
	Patient ID:

Requestor Contact: ABT Vault Chip Burton 3111 Ashlock Any, TX 77802 (832) 541-5155 (p) (810) 963-6833 (f)	Provider Contact: ABT Health, Inc. Chip Burton 4828 Williams Creek Drive College Station, TX 77845 832-541-5155 (p) 810-963-6833 (f) c/o ABT Default
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Your office has requested PHI from the Provider listed above.
You must go to the website below to view the status and content of both pending and completed ROI requests.

WWW.ABTROIPLUS.COM

You must use the Requestor Acct # and Requestor Pin # values that appear in the top portion of this notice, along with the Patient Date of Birth, to view the status and content of both pending and completed ROI requests.
Complete instructions are available on the website.

IMPORTANT NOTE:

FORWARDING ROI REQUESTS OR PATIENT RECORDS BY MAIL OR FAX EXPOSES PATIENTS TO THE RISK OF IDENTITY THEFT AND EXPOSES PROVIDERS AND REQUESTORS TO LITIGATION FROM PATIENTS WHO SUFFER IDENTITY THEFT. TRANSMITTALS OF PHI REQUEST FORMS AND PATIENT RECORDS CONTAINING CERTAIN CRITICAL INFORMATION (Patient Name, Social Security Number, Date of Birth) THAT ENABLES IDENTITY THEFT SHOULD BE CLOSELY SAFEGUARDED AND TRACKED TO PROTECT PATIENTS, REQUESTORS AND PROVIDERS FROM POTENTIAL LEGAL AND COMPLIANCE LIABILITIES.

IF REQUESTOR CHOOSES TO TAKE DELIVERY OF PATIENT RECORDS BY MAIL OR FAX, REQUESTOR HEREBY ACKNOWLEDGES, UPON RECEIPT OF THIS NOTICE, SOLE RESPONSIBILITY FOR ALL CONTINGENT LEGAL AND COMPLIANCE LIABILITIES THAT OCCUR AFTER RECEIPT OF TRANSMITTED PATIENT RECORDS.

Processing a New Request - Continued

BEFORE YOU BEGIN! Scan and save the original Request document to the designated folder on your workstation. This should be the first document in the Request file and, therefore, the first document to be read by the Requestor.

STEP #1 - Click the “Create New Request” link.

Log New ROI Request

The Log New ROI Request form will appear.

ROI Request Information

Provider:

Request Type: [Request Type Help?](#)

Patient Name: [Add new patient](#)

Requestor: [Add new requestor](#)

Contact: [Add new contact](#)

Fax Number: WARNING: Sending Patient records to an incorrect fax # is a breach of Patient confidentiality!!! Are you sending this Request package to the correct fax #? Compare the fax # here to the fax # on the original Request document.

Dates of Service: From To

Optional Reference:

Billing Type: ☐ Include the Invoice as the first page in the Request Release

Delivery Type:

Request Summary Information

Request Type: None
Patient:
Requestor:

Save & Log Another Request Save & Go to Upload Save & Exit to Result List Exit Without Saving

Be advised that the Requestor contact information contained in the PHI REQUEST FULFILLMENT NOTIFICATION is originated by Providers, not ABT Global, Inc. Thus, ABT Global, Inc. makes no guarantee as to the accuracy of the Requestor contact information contained in the PHI REQUEST FULFILLMENT NOTIFICATION. By generating the PHI REQUEST FULFILLMENT NOTIFICATION, you agree that confirming the accuracy of all Requestor contact information contained therein remains your sole responsibility as a Provider and that ABT Global, Inc. is not responsible for any errors or omissions in Requestor contact information, whether or not that information is relied upon by you or other Providers.

STEP #2 - Select the Request Type

Select the appropriate Request Type from the pull-down list labeled “Request Type.”

Request Type:

None
Audit
Business Office
Certified
Continuing Care
Disability Determination Services
Disability Non-DDS
EMSI
Fax Continuing Care
Government Agencies
Hospital Departments - Other
In-House
Insurance
Law Enforcement
Legal (Attorney)
Medicare - Medicaid
Patient
Peer Review
Radiology
Risk Management

NOTE: Choose “Disability Determination Services” for all Requests from DDS.

NOTE: Choose “EMSI” for any and all Requests referencing “EMSI.”

NOTE: Choose “Patient” for all Requests directly from a Patient.

STEP #3 - Search for the Patient (search results will give you Patient Name, DOB, and MRN)

Search by Patient Name (format: last,first): Enter *three or more* letters of the Patient’s Last Name into the field labeled “Patient Name.” Once you type at least three letters, a list of Patients whose Last Name **begins with** those three letters will be displayed. If you wish to narrow your list, continue to type additional letters of the Patient’s Last Name and, if needed, begin to type the Patient’s First Name. Use the following format with *no space after the comma*: last,first. Click once on the correct Patient Name to select it.

OR

Search by Patient Date of Birth (m/d/yyyy): Enter the Patient’s entire Date of Birth using the m/d/yyyy format. A list of Patients with that Date of Birth will be displayed. Click once on the correct Patient Name to insert it.

If you do not find the Patient Name that matches the one in the original request document, click the “[Add new patient](#)” link to add the Patient to the system. If you believe the Patient is already in the system, you may continue your search by exiting the Log New Request process and clicking the Patient tab to perform additional searches.

Patient Name:

burton,chi

[Add new patient](#)

Burton,Chip - 10/11/1952 - 111111

Burton,Chip - 10/11/1952 - 333333333

STEP #4 - Search for the Requestor

Enter three or more letters from the Requestor Name into the field labeled “**Requestor.**” Once you type *at least three letters*, a list of Requestor names **containing** those three letters **anywhere in the Requestor name** will appear. As you type in more letters of the Requestor name, the list will continue to narrow down for you. Click once on the correct Requestor to select it.

If you do not find the Requestor name that matches the one in the original request document, click the “[Add new requestor](#)” link to add the Requestor to the system.

Requestor: [Add new requestor](#)
ABT Vault

Note: If any of this Requestor's previous requests are currently on Credit Hold, a red **Credit Hold** alert will appear below the Contact field when you select the Requestor. This and any future requests will also be designated automatically by a “**C**” next to Request Status and an “**OVERDUE**” watermark on the invoice.

STEP #5 - Verify the Requestor Contact and Fax #

Verify Requestor Contact: If there are already Contacts in the system for the chosen Requestor, a pull-down list will be available to you in the Contact field after you select the Requestor. Choose the Requestor Contact from the list that matches the Contact information in the original Request document. If you cannot find a matching Contact Name, click “[Add new contact](#)” to the right of the contact pull-down list. **For HIPAA compliance, you must include a Requestor Contact Name, if possible.**

Verify Fax #: You must also verify that you are using the exact same Fax # as the one listed in the original Request document. To update the Fax # for a specific contact in the ROI+ database, save & exit the Log New ROI Request screen and go to the Requestor tab. However, if you would like to change the Fax # *for this one instance only*, use the Fax Number field (shown below) to delete any incorrect digits and type the corrected digits following this format: (nnn) nnn-nnnn.

Contact: [Add new contact](#)
 Chip Burton ~(810) 963-6833
 Chris Regan ~(810) 963-6833
 Don Smith ~(810) 963-6833
 Don test33 ~(810) 963-6833
 Don White ~(323) 232-3232
 Janet Eimers ~(810) 963-6833
 Kenneth Kopald ~(704) 256-9712
 Manske, Stephen C ~(810) 963-6833
 Michael Million ~(810) 963-6833

Fax Number:

(nnn) nnn-nnnn

WARNING: Sending Patient records to an incorrect fax # is a breach of Patient confidentiality!!! Are you sending this Request package to the correct fax #? Compare the fax # here to the fax # on the original Request document.

STEP #6 - Enter Dates of Service (optional item)

You may enter the Date(s) of Service specified in the original Request document. Use the following format: mm/dd/yyyy.

Note: If the Requestor did not specify the date(s) of service for the requested records, you cannot legally fulfill the Request.

Dates of Service: mm/dd/yyyy

From	To
<input type="text"/>	<input type="text"/>

STEP #7- Enter the Optional Reference (optional item)

You have the option to enter one or more descriptors for the Request (using letters and/or numbers) to make searching for the Request or posting payments easier. Separate the descriptors by using a comma, with no space before or after the comma. Each descriptor is searchable from both the Payment tab and the main ROI Requests tab.

Optional Reference:

STEP #8 - Select the Billing Type

Select the appropriate Billing Type from the following choices in the pull-down list labeled “Billing Type”:

Billable - Unpaid (Requestor is a Billable entity; PHI is not viewable until Requestor pays the invoice)

Non-Billable - Release for Viewing (Requestor is deemed a Non-Billable entity; PHI is viewable upon completion)

Disability - Release for Viewing (Requestor is a Disability Determination Services entity; PHI is viewable upon completion)

Disability - Non-Billable Release for Viewing (Requestor is deemed Non-Billable; PHI is viewable upon completion)

Continuing Care Requests are generally Non-Billable, so the system will default to Non-Billable if you select “Continuing Care” as the Request Type in Step #2.

Billing Type:

Billable - UnPaid
Billable - UnPaid
Non-Billable - Release for Viewing
Disability - Release for Viewing
Disability - Non-Billable Release for Viewing

STEP #9 - Check the Box if including invoice as page 1 (optional)

Mark the checkbox underneath the Billing Type field if the Requestor requires you to include the invoice as the first page of the Request File itself. **NOTE: This procedure is required by some Requestors, such as Blue Cross Blue Shield of Alabama, for you to receive payment for the fulfillment.** By default, the invoice will be sent separately, unless you check this box.

Billing Type: Billable - UnPaid
☐ Include the Invoice as the first page in the Request Release

STEP #10 - Select the Delivery Type

From the pull-down menu, choose the method of delivering the Request. The default delivery method is Web. NOTE: The invoice will NOT contain a Requestor Account # and PIN to access records online if you do not select [Web](#).

Delivery Type: Web
 CD/DVD
 Email
 Fax
 Paper
 Web

STEP #11 - Review the Request Summary Information

At the bottom of the Log New ROI Request form, you will see a summary of the Request Type, Patient, and Requestor you entered. Check to make sure these items are correct. If any information is incorrect, edit it in the fields above. If correct, go to the next step.

Request Summary Information

Request Type: Legal (Attorney)
 Patient: Burton, Chip - 10/11/1952
 Requestor: ABT Vault

STEP #12- Select Your Next Action

Click **“Save & Log Another Request”** to log in another Request using the Log New ROI Request form;
 Click **“Save & Go to Upload”** to continue processing the Request you just entered into the system;
 Click **“Save & Exit to Result List”** to save your work and return to the Result List; or
 Click **“Exit Without Saving”** to return to the Result List without saving your work.

Save & Log Another Request

Save & Go to Upload

Save & Exit to Result List

Exit Without Saving

See Chapter 2, Step #2, Option 2

See Chapter 2, Step #2, Option 1

STEP #13 - Verify that the Request is "Logged"

When you are finished with entering one or more Requests on the Log New ROI Request form, you can go to the **"Result List"** on the ROI Requests tab to verify each new Request is now in the ROI+ system. The Request(s) will have a **"RED"** Request ID in the RequestID column and a status of **"Logged"** in the Request Status column. The Request date will be today's date.

Ref	Action	Notes	Form	RequestID	Request Status	Request Date	Requestor	Patient Name	Patient DOB	Invoice Number	Invoice Date	Invoice Amount	Billing Status	Paid Status	Date Paid
1	action	view		REQ20150127182540982 +	Logged	1/27/2015	ABT Vault	Burton, Chip	10/11/1952	IN20150127182540982 +	1/27/2015	\$0.00	Billable	UnPaid	
2	action	view		REQ20150123075148100 +	Logged	1/23/2015	Patient	Burton, Chip	10/11/1952	IN20150123075148100 +	1/23/2015	\$0.00	Billable	UnPaid	
3	action	view		REQ20150123091634421 +	Incomplete	1/23/2015	ABT Vault	Burton, Chip	10/11/1952	IN20150123091634421 +	1/23/2015	\$0.00	Non Billable	UnPaid - viewable	
4	action	view		REQ20150113102044965 +	Logged	1/13/2015	Patient	Burton, Chip	10/11/1952	IN20150113102044965 +	1/13/2015	\$0.00	Billable	UnPaid	
5	action	view		REQ20150111182120679 +	Logged	1/11/2015	Patient	Burton, Chip	10/11/1952	IN20150111182120679 +	1/11/2015	\$0.00	Billable	UnPaid	
6	action	view		REQ20150110124324578 +	Logged	1/10/2015	Patient	Burton, Chip	10/11/1952	IN20150110124324578 +	1/10/2015	\$0.00	Billable	UnPaid	
7	action	view		REQ20150110125108493 +	Logged	1/10/2015	Patient	Burton, Chip	10/11/1952	IN20150110125108493 +	1/10/2015	\$0.00	Billable	UnPaid	
8	action	view		REQ20141219084702454 +	Complete	12/19/2014	Patient	Burton, Chip	10/11/1952	IN20141219084702454 +	1/13/2015	\$25.00	Billable	UnPaid	
9	action	view		REQ20141215104139378 +	Notified	12/15/2014	ABT Vault	Burton, Chip	10/11/1952	IN20141215104139378 +	12/15/2014	\$36.00	Billable	Paid	1/25/2015

STEP #14 - Review PHI Request Fulfillment Notification

You can click **"view"** in the Result List of the ROI Requests tab to display the **"PHI Request Fulfillment Notification"** and verify that the information is correct.

Dashboard Show Query Create New Request Help Admin Logout

ROI Requests Requestors Patients Payment Audit

Documents Found: 1

Results sorted by: RequestID


Click on the Link below to view the document.

Ref	Action	Notes	Form	RequestID	Request Status	Request Date	Requestor	Patient Name	Patient DOB	Invoice Number	Invoice Date	Invoice Amount
1	action	view		REQ20150130111831883 +	Notified	1/30/2015	ABT Vault	Burton, Chip	10/11/1952	IN20150130111831883 +	1/30/2015	\$52.50
2	action	view		REQ20150127182540982 +	Logged	1/27/2015	ABT Vault	Burton, Chip	10/11/1952	IN20150127182540982 +	1/27/2015	\$0.00
3	action	view		REQ20150123075148100 +	Logged	1/23/2015	Patient	Burton, Chip	10/11/1952	IN20150123075148100 +	1/23/2015	\$0.00
4	action	view		REQ20150123091634421 +	Incomplete	1/23/2015	ABT Vault	Burton, Chip	10/11/1952	IN20150123091634421 +	1/23/2015	\$0.00
5	action	view		REQ20150113102044965 +	Logged	1/13/2015	Patient	Burton, Chip	10/11/1952	IN20150113102044965 +	1/13/2015	\$0.00
6	action	view		REQ20150111182120679 +	Logged	1/11/2015	Patient	Burton, Chip	10/11/1952	IN20150111182120679 +	1/11/2015	\$0.00
7	action	view		REQ20150110124324578 +	Logged	1/10/2015	Patient	Burton, Chip	10/11/1952	IN20150110124324578 +	1/10/2015	\$0.00
8	action	view		REQ20150110125108493 +	Logged	1/10/2015	Patient	Burton, Chip	10/11/1952	IN20150110125108493 +	1/10/2015	\$0.00
9	action	view		REQ20141219084702454 +	Complete	12/19/2014	Patient	Burton, Chip	10/11/1952	IN20141219084702454 +	1/13/2015	\$25.00
10	action	view		REQ20141215104139378 +	Notified	12/15/2014	ABT Vault	Burton, Chip	10/11/1952	IN20141215104139378 +	12/15/2014	\$36.00
11	action	view		REQ20141125112216621 +	Viewed	11/25/2014	ABT Vault	Burton, Chip	10/11/1952	IN20141125112216621 +	11/25/2014	\$25.00
12	action	view		REQ20141124071230354 +	Notified	11/24/2014	ABT Vault	Burton, Chip	10/11/1952	IN20141124071230354 +	11/24/2014	\$0.00
13	action	view		REQ20141124071230354 +	Notified	11/24/2014	ABT Vault	Burton, Chip	10/11/1952	IN20141124071230354 +	11/24/2014	\$25.00
14	action	view		REQ20141017061537656 +	Logged	10/17/2014	ABT Vault	Burton, Chip	10/11/1952	IN20141017061537656 +	10/17/2014	\$0.00
15	action	view		REQ20140929083955528 +	Logged	9/29/2014	ABT Vault	Burton, Chip	10/11/1952	IN20140929083955528 +	9/29/2014	\$0.00
16	action	view		REQ20140929084417689 +	Logged	9/29/2014	ABT Vault	Burton, Chip	10/11/1952	IN20140929084417689 +	9/29/2014	\$0.00
17	action	view		REQ20140929085855355 +	Logged	9/29/2014	ABT Vault	Burton, Chip	10/11/1952	IN20140929085855355 +	9/29/2014	\$0.00
18	action	view		REQ20140927091089981 +	Incomplete	9/27/2014	ABT Vault	Burton, Chip	10/11/1952	IN20140927091089981 +	9/27/2014	\$25.00
19	action	view		REQ20140905101629168 +	Incomplete	9/5/2014	Patient	Burton, Chip	10/11/1952	IN20140905101629168 +	9/5/2014	\$25.00
20	action	view		REQ20140829080104733 +	Complete	8/29/2014	ABT Vault	Burton, Chip	10/11/1952	IN20140829080104733 +	11/18/2014	\$18.00
21	action	view		REQ20140808071015593 +	Notified	8/8/2014	ABT Vault	Burton, Chip	10/11/1952	IN20140808071015593 +	8/8/2014	\$44.00
22	action	view		REQ20140725093808657 +	Complete	7/25/2014	Patient	Burton, Chip	10/11/1952	IN20140725093808657 +	7/25/2014	\$0.00
23	action	view		REQ20140725093808657 +	Notified	7/25/2014	ABT Vault	Burton, Chip	10/11/1952	IN20140725093808657 +	10/21/2014	\$51.50
24	action	view		REQ20140722084449596 +	Notified	7/22/2014	ABT Vault	Burton, Chip	10/11/1952	IN20140722084449596 +	7/22/2014	\$20.00
25	action	view		REQ20140722084449596 +	Notified	7/22/2014	ABT Vault	Burton, Chip	10/11/1952	IN20140722084449596 +	7/22/2014	\$20.00
26	action	view		REQ20140716083938523 +	Notified	7/16/2014	ABT Vault	Burton, Chip	10/11/1952	IN20140716083938523 +	7/16/2014	\$25.00
27	action	view		REQ201407101084107504 +	Viewed	7/10/2014	ABT Vault	Burton, Chip	10/11/1952	IN201407101084107504 +	7/10/2014	\$30.00
28	action	view		REQ20140626054535755 +	Notified	6/26/2014	ABT Vault	Burton, Chip	10/11/1952	IN20140626054535755 +	6/26/2014	\$0.00

ROI Plus

YOUR OFFICE HAS REQUESTED A PHI FOR THE PATIENT LISTED BELOW

PHI REQUEST FULFILLMENT NOTIFICATION



Request Date: 1/30/2015
Requestor Name: ABT Vault
Requestor Acct: R10068
Requestor PIN: 5445

Request ID: REQ20150130111831883
Patient Name: Burton, Chip
Patient DOB: xxx/xx/xxxx
Patient MRN: 333333333

Requestor Contact:
ABT Vault
Chip Burton
3111 ashlock
Any, TX 77802
(832) 541-5155 (p) (810) 963-6833 (f)

Provider Contact:
ABT Health, Inc.
Chip Burton
4828 Williams Creek Drive
College Station, TX 77845
832-541-5155 (p) 810-963-6833 (f)
c/o ABT Default

Your office has requested PHI from the Provider listed above.
You must go to the website below to view the status and content of both pending and completed ROI requests.
WWW.ABTROIPLUS.COM

CHAPTER 2.0

UPLOADING PATIENT FILES

Uploading Requested Patient Files is the second step of the Request fulfillment process, after **Processing a New Request**. You will first upload the original Request document followed by all requested PHI.

Before you can upload Patient files, you must first select those Patient files outside of the ROI+ system (with the exception of cases where the Provider uses ABT's MedXpress repository).

One or more of the following steps may be required, depending upon the number of separate medical record repositories used at your Provider location:

- Convert paper or microfilm-based content into **.TIF or .PDF** digital file formats
- Export medical records from EMR/EHR system into **.TIF or .PDF** digital file formats
- Save all digital files to a folder on the **ROI+** designated workstation

A high-speed Internet connection makes the Upload processing of selected files much more efficient. In fact, fast Internet connectivity is essential for uploading very large Patient files.

The Uploaded files will reside in the **ROI+ repository**, which enables both the Provider and the Requestor to view the files. However, it is the Provider who determines the access timeline for Requestors.

Although an infrequent requirement, additional middleware software may be needed to provide downloads in the proper .TIF or .PDF file formats or to bundle multiple files into a single file format, depending on the export capabilities of the specific EMR/EHR being accessed.

AFTER selecting and saving all required Patient files from the Provider EMR/ EHR and any other repositories to your workstation, you will begin the Upload process inside ROI+.

Note: Most users will upload files from their desktop. Only those users accessing files from ABT's MedXpress repository will select files from the Patient Archive.

Select Request File(s) from Patient Archive

Click [here](#) to select files from Patient Record Archive for [Burton,Chip](#)

-or- Upload Request File(s) from Desktop

[Click here to exit and return to results](#)

Uploaded files are for the following:

RequestID: [REQ20150915133652424](#) Patient: [Burton,Chip](#)

Requestor: [ABT Vault](#)

DOB: [10/11/1952](#)

Encounter: [Base Encounter](#)

Select Upload File button to upload files

Upload File(s)

STEP #1 - Click “+” to Upload the Request files from the designated location

Click “+” immediately to the right of the relevant “Request ID” in the Result List of the ROI Requests tab to display the “Upload Request Files” screen. See “ROI Requests Tab - Results” schematic for color-coding key.

Ref	Action	Notes	Form	RequestID	Request Status
1	action		view	REQ20150123075148100 +	Logged
2	action		view	REQ20150123091634421 +	Incomplete
3	action		view	REQ20150113102044965 +	Logged
4	action		view	REQ20150111182120679 +	Logged
5	action		view	REQ20150110124324578 +	Logged
6	action		view	REQ20150110125108493 +	Logged
7	action		view	REQ20141219084702454 +	Complete

Step #2, Option 1 - Select files from Patient archive

If the Provider uses ABT’s MedXpress repository, click “[here](#)” in the Select Request File(s) from Patient Archive section. **Most users will use Step #2, Option 2 instead.**

Select Request File(s) from Patient Archive

Click [here](#) to select files from Patient Record Archive for [Burton,Chip](#)

-or- Upload Request File(s) **OR Click to exit and return to results**

Step #2, Option 2 - Upload files from workstation

Most users will click the “Upload File(s)” button to locate the original Request document AND all processed digital PHI file(s) for the indicated **Patient**. Those target files should have already been placed, by you or a colleague, in the designated folder(s) on your workstation before you started the Upload process.

[Click here to exit and return to results](#)

Uploaded files are for the following:

RequestID: [REQ20150915133652424](#) Patient: [Burton,Chip](#)

Requestor: [ABT Vault](#)

DOB: [10/11/1952](#)

Encounter: [Base Encounter](#)

Select Upload File button to upload files

Upload File(s)

Step #3 - Choose the Patient Files

A file selection window will appear. Go to the folder that contains the file(s) you need to Upload. Select the file(s), either by double-clicking or by clicking once and clicking "Open."

Repeat Steps #2 and #3 until you have Uploaded all requested files to the ROI+ repository. Ensure that you upload them in the same order that they should be sent to the Requestor.

THE FIRST FILE IN THE UPLOAD SEQUENCE SHOULD ALWAYS BE THE ORIGINAL REQUEST DOCUMENT FROM THE REQUESTOR.

Name	Date modified
DoctorNotes	2/1/2015 4:05 PM
FaceSheet	2/1/2015 4:05 PM
HistoryPhysical	2/1/2015 4:08 PM
LabReports	2/1/2015 4:06 PM
OperativeReport	2/1/2015 4:06 PM
SurgicalConsent	2/1/2015 4:07 PM
DoctorNotes	2/11/2015 1:41 PM
FaceSheet	2/11/2015 1:42 PM
HistoryPhysical	2/11/2015 1:42 PM
LabReports	2/11/2015 1:42 PM
ManskeS-Request	2/11/2015 1:37 PM
OperativeReport	2/11/2015 1:43 PM
SurgicalConsent	2/11/2015 1:43 PM

Exit to Results List

[Click here to exit and return to results](#)

Uploaded files are for the following:

RequestID: REQ20150915133652424 Patient


Requestor: ABT Vault

DOB:

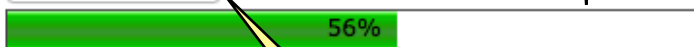
Encounter: Base Encounter

Select Upload File button to upload files

Upload File(s)

 ManskeS-Request.pdf	
 DoctorNotes.pdf	
 FaceSheet.pdf	
 HistoryPhysical.pdf	

Cancel all Uploads



Uploading FaceSheet.pdf. 495 KB of 887 KB at 368KB/s; 2 seconds remaining

Cancel upload

Click "Cancel all Uploads" to stop the entire Upload session. Click "Cancel upload" to stop the Upload for a specific file while it is in progress.

Step #4, Phase 2 - Confirm the success of the Upload

Once the files have been Uploaded successfully, a confirmation message will appear. It gives you the file name, format, and size for each Uploaded file.

[Click here to exit and return to results](#)
 Uploaded files are for the following:
 RequestID: REQ20150915133652424 Patient: Burton,Chip
 Requestor: ABT Vault DOB: 10/11/1952
 Encounter: Base Encounter

Select Upload File button to upload files

Upload File(s)

Done

Files uploaded:
 ManskeS-Request.pdf (8163620B)
 DoctorNotes.pdf (2130537B)
 FaceSheet.pdf (907657B)
 HistoryPhysical.pdf (1451086B)

File(s) Uploaded Successfully

Step #4, Phase 3 - Click "Done" to finish the Upload process

Clicking "Done" will finish the Upload process and begin the next process - Page Selection.

NOTE: If a file is unusually large, it might take additional time to compress for easy opening and handling. In this case, you will see the following message on the next screen for QA/QC:

Please be aware that larger files will take more time to finish the file compression process.

You will also see this message next to the relevant file until it has finished compressing for you:

File compression in progress

Step #5 - Review Uploaded files

Next, you will review the Uploaded files during the Page Selection process. If you choose to do Page Selection later, you can still view the Uploaded files now by going to the ROI Requests tab. The **Request ID** will turn **yellow** once any file has been Uploaded to the ROI+ repository. Click the relevant **yellow Request ID** to view the Uploaded file(s).

Ref	Action	Notes	Form	RequestID	Request Status
1	action		view	REQ2015127182540982 +	Logged
2	action		view	REQ2015123075148100 +	Logged
3	action		view	REQ2015123091634421 +	Incomplete
4	action		view	REQ20140905101629168 +	Incomplete

CHAPTER 3.0

PERFORMING QUALITY CONTROL PROCESS

Performing the Quality Control Process by selecting pages from Uploaded files is the third step, after **Processing a New Request** and **Uploading Files**. Sometimes with scanned files or even with EMR systems, it is difficult (if not impossible) to pick just the information being requested. Once files are Uploaded, specific pages within those files can be reviewed and picked more easily to match the requirements of the Request.

You have four options for selecting the appropriate content from each file:

- 1. Process Option** - Review pages in a specific file to select the page(s) that meet the Request criteria
 - Manually advance pages or review them in "slide show" mode
 - View pages as thumbnails
 - Use include/exclude list to mark each page that you wish to *include*
- 2. QA Process Option** - Review pages in a specific file to select the page(s) that meet the Request criteria
 - View larger, streamed images of each page
 - Use Adobe Acrobat to navigate file
 - Enter page numbers of pages or page ranges to be *excluded*
 - Better for larger files (e.g., over 100 pages in a file) - loads faster, images are larger and crisper
- 3. All Pages Option** - Select all pages in the file
- 4. No Pages Option** - Select none of the pages in the file

The **"Request is Complete"** button should be clicked only when *all* requested content has been located, Uploaded, and Selected. Once **"Request is Complete"** is clicked, the ROI+ system will automatically send the **PHI Request Fulfillment Notification** via the fax number you selected/entered during the Processing a New Request step.

IMPORTANT! You must choose the pages from each uploaded file that you want the Requestor to be able to view **BEFORE** you mark the Request **Complete**. Pages that are not chosen will not be seen by the Requestor.

[return to results](#)

Status	Request ID	Request Date	Requestor	Patient	DOB	Total Pages / Included
Incomplete	REQ20140905101629168	9/5/2014	Patient	Burton, Chip	10/11/1952	29 / 0

[Resend Notification](#)

ROI Documents related to this request:

Ref	Standard View	Quality Control	Total Pages / Included	Date/Time	Delete
			(All Pages) (No Pages)		
1	<input type="checkbox"/> Request Item 1 (Process)	(QA Process) (All Pages) (No Pages)	3 / 0	9/5/2014 10:18:20 AM	<input checked="" type="checkbox"/>
2	<input type="checkbox"/> Request Item 2 (Process)	(QA Process) (All Pages) (No Pages)	1 / 0	9/16/2014 8:10:11 AM	<input checked="" type="checkbox"/>
3	<input type="checkbox"/> Request Item 3 (Process)	(QA Process) (All Pages) (No Pages)	3 / 0	2/1/2015 8:04:06 PM	<input checked="" type="checkbox"/>
4	<input type="checkbox"/> Request Item 4 (Process)	(QA Process) (All Pages) (No Pages)	7 / 0	2/1/2015 8:04:08 PM	<input checked="" type="checkbox"/>
5	<input type="checkbox"/> Request Item 5 (Process)	(QA Process) (All Pages) (No Pages)	15 / 0	2/1/2015 8:04:10 PM	<input checked="" type="checkbox"/>
<input type="checkbox"/> Show All <input type="button" value="View Selected"/> <input type="button" value="PopUp Selected"/>					

Include ALL Pages from ALL files

Include NO Pages from ANY files

Upload More Files

Process Option

Review thumbnail of each page; specify pages to include.

QA Process Option

Review each page; specify page #s of pages to exclude.

All Pages Option

Include all pages from specific file.

No Pages Option

Include no pages from specific file.

Page Selection Indicator

Indicates total # of pages in file / total # of pages to be included in Request

PROCESS Option, Step #1 - Click **“(Process)”** next to a specific file to select pages

[return to results](#)

Status	Request ID	Request Date	Requestor	Patient	DOB	Total Pages / Included
Incomplete	REQ20140905101629168	5/5/2014	Patient	Burton, Chip	10/11/1952	29 / 0

Resend Notification

ROI Documents related to this request:

Add Invoice To Request

Add Additional Patient Info

Ref	Standard View	Quality Control	Total Pages / Included	Date/Time	Delete
			(All Pages) (No Pages)		
1	<input type="checkbox"/> Request Item 1	(Process) (QA Process) (All Pages) (No Pages)	3 / 0	9/5/2014 10:18:20 AM	<input checked="" type="checkbox"/>
2	<input type="checkbox"/> Request Item 2	(Process) (QA Process) (All Pages) (No Pages)	1 / 0	9/16/2014 8:10:11 AM	<input checked="" type="checkbox"/>
3	<input type="checkbox"/> Request Item 3	(Process) (QA Process) (All Pages) (No Pages)	3 / 0	2/1/2015 8:04:06 PM	<input checked="" type="checkbox"/>
4	<input type="checkbox"/> Request Item 4	(Process) (QA Process) (All Pages) (No Pages)	7 / 0	2/1/2015 8:04:08 PM	<input checked="" type="checkbox"/>
5	<input type="checkbox"/> Request Item 5	(Process) (QA Process) (All Pages) (No Pages)	15 / 0	2/1/2015 8:04:10 PM	<input checked="" type="checkbox"/>
	<input type="checkbox"/> Select All	View Selected	PopUp Selected		

Request is Complete

[Exit to results](#)

The following screen will appear, listing each page in the selected file for viewing.

ROI+

Quality Control Process

[Save and Exit](#)[Cancel and Exit](#)

- Page1 ☐ Include ☒ Exclude
 Page2 ☐ Include ☒ Exclude
 Page3 ☐ Include ☒ Exclude
 Page4 ☐ Include ☒ Exclude
 Page5 ☐ Include ☒ Exclude
 Page6 ☐ Include ☒ Exclude
 Page7 ☐ Include ☒ Exclude

Play

Previous Next

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15298
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 1512 HOLLEMAN
 COLLEGE STATION, TX 77840

PATIENT NAME: MANSKE, STEPHEN PATIENT ID: 59 M CHRS IMPERIAL
 ROOM NUMBER: 59 M CHRS IMPERIAL
 PAGE: 1 REQUESTION NO. ACCESSION NO. ID. NO. COLLECTION DATE & TIME LOG-IN DATE REPORT DATE & TIME
 1 T0454834 BC856888 690-9038 03/19/04 9:40 03/19/04 03/20/04 7:14
 TESTS REQUESTED
 COMP METAB PNL, LIPID PROFILE, CBC, PSA SCRN MC,

TEST	RESULTS	UNITS	EXPECTED RANGE
COMPREHENSIVE METABOLIC PANEL			
GLUCOSE	83	MG/DL	65 - 110
BUN	17	MG/DL	8 - 25
CREATININE	1.0	MG/DL	0.8 - 1.4
CALCULATED BUN/CREAT	17.0		6 - 28
SODIUM	142	MEQ/L	133-146
POTASSIUM	4.0	MEQ/L	3.5 - 5.3
CHLORIDE	105	MEQ/L	97-110
CARBON DIOXIDE	27	MEQ/L	18 - 30
CALCIUM	9.2	MG/DL	8.5-10.5
PROTEIN, TOTAL	7.0	G/DL	6.0-8.4
ALBUMIN	4.2	G/DL	2.9 - 5.0
CALCULATED GLOBULIN	2.8	G/DL	2.0 - 3.8
CALCULATED A/G RATIO	1.50		0.9 - 2.5
BILIRUBIN, TOTAL	0.5	MG/DL	0.1-1.3
ALKALINE PHOSPHATASE	78	U/L	30 - 132
SGPT (AST)	24	U/L	5 - 35
SGPT (ALT)	38	U/L	7 - 56
LIPID PANEL			
CHOLESTEROL	151	MG/DL	< 200
TRIGLYCERIDES	104	MG/DL	< 150
HDL CHOLESTEROL	39	MG/DL	> 39

PROCESS Option, Step #2 - View the pages within the specified file

You have three options on the Process screen for viewing the pages, as described below.

A. When you click each page #, the actual page will be displayed to the right.

Record Page Selector

Save and Exit Cancel and Exit

Page1 ☐ Include ☒ Exclude
 Page2 ☐ Include ☒ Exclude
 Page3 ☐ Include ☒ Exclude
 Page4 ☐ Include ☒ Exclude
 Page5 ☐ Include ☒ Exclude
 Page6 ☐ Include ☒ Exclude
 Page7 ☐ Include ☒ Exclude

B. Click "Play" to view the files as a "slide show." Click "Pause" in the same spot to stop on a page to view it.

Play

C. Click on **Previous** or **Next** to move through the file one page at a time.

Previous Next

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CAP Accreditation #: 21525-01
 CLIA # 45D050003

PAGE	REQUESTION NO.	ACCESSION NO.	ID. NO.	COLLECTION DATE & TIME	LOG-IN DATE	REPORT DATE & TIME
1	T0454034	BC056000	690-9030	03/19/04 9:1400	03/19/04	03/20/04 7:1140

TESTS REQUESTED
 COMP METAB PNL, LIPID PROFILE, CBC, PSA SCRIN MC,

TEST	RESULTS	UNITS	EXPECTED RANGE
COMPREHENSIVE METABOLIC PANEL			
GLUCOSE	83	MG/DL	65 - 110
BUN	17	MG/DL	8 - 25
CREATININE	1.0	MG/DL	0.8 - 1.4
CALCULATED BUN/CREAT	17.0		6 - 28
SODIUM	142	MEQ/L	133-146
POTASSIUM	4.0	MEQ/L	3.5 - 5.3
CHLORIDE	105	MEQ/L	97-110
CARBON DIOXIDE	27	MEQ/L	18 - 30
CALCIUM	9.2	MG/DL	8.5-10.5
PROTEIN, TOTAL	7.0	G/DL	6.0-8.4
ALBUMIN	4.2	G/DL	2.9 - 5.0
CALCULATED GLOBULIN	2.8	G/DL	2.0 - 3.6
CALCULATED A/G RATIO	1.50		0.9 - 2.5
BILIRUBIN, TOTAL	0.5	MG/DL	0.1-1.3
ALKALINE PHOSPHATASE	78	U/L	30 - 132
SGOT (AST)	24	U/L	5 - 35
SGPT (ALT)	38	U/L	7 - 56
LIPID PANEL			
CHOLESTEROL	151	MG/DL	< 200
TRIGLYCERIDES	104	MG/DL	< 150
HDL CHOLESTEROL		MG/DL	> 39

PROCESS Option, Step #3 - Mark pages to be included in the Request

No matter how you choose to view the pages in the Process Option, you must use the pages list to "Include" each page that should appear in the Request file.

QA PROCESS Option, Step #1 - Click “(QA Process)” next to a specific file to select pages

[return to results](#)

Status	Request ID	Request Date	Requestor	Patient	DOB	Total Pages / Included
Incomplete	REQ20140905101629168	9/5/2014	Patient	Burton, Chip	10/11/1952	29 / 0

Resend Notification

ROI Documents related to this request:

Ref	Standard View	Quality Control	Add Invoice To Request		Add Additional Patient Info	
			Total Pages / Included	Date/Time	Delete	
			(All Pages) (No Pages)			
1	<input type="checkbox"/> Request Item 1 (Process)	(QA Process) (All Pages) (No Pages)	3 / 0	9/5/2014 10:18:20 AM	<input type="checkbox"/>	
2	<input type="checkbox"/> Request Item 2 (Process)	(QA Process) (All Pages) (No Pages)	1 / 0	9/16/2014 8:10:11 AM	<input type="checkbox"/>	
3	<input type="checkbox"/> Request Item 3 (Process)	(QA Process) (All Pages) (No Pages)	3 / 0	2/1/2015 8:04:06 PM	<input type="checkbox"/>	
4	<input type="checkbox"/> Request Item 4 (Process)	(QA Process) (All Pages) (No Pages)	7 / 0	2/1/2015 8:04:08 PM	<input type="checkbox"/>	
5	<input type="checkbox"/> Request Item 5 (Process)	(QA Process) (All Pages) (No Pages)	15 / 0	2/1/2015 8:04:10 PM	<input type="checkbox"/>	
	<input type="checkbox"/> Select All	<input type="button" value="View Selected"/> <input type="button" value="PopUp Selected"/>				

[Request is Complete](#)

[Exit to results](#)

QA PROCESS Option, Step #2 - View the pages within the specified file

On the QA Process screen, you have two options for viewing pages, as described below.

A. Click on the Adobe Acrobat icon to access the Acrobat options. You can then access a thumbnail view for scrolling (more detail below).

B. Use the scrollbar to move up and down.

NOTE: The Acrobat options appear near the top of the Request document when the QA Process screen first opens. Then, these options disappear. To make them reappear, you must move your mouse over the area of the document where they first appeared.

Quality Control Process

List of pages to exclude. For example to exclude pages 1 and 4, enter 1,4

1-7

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CLIA # 45D0505003

6298
BRADIS PHYSICIANS GROUP
1512 HOLLEMAN
COLLEGE STATION, TX 77840

PATIENT NAME: MANSKE, STEPHEN
PATIENT ID:
ROOM NUMBER:
AGE: 59 SEX: M
PHYSICIAN: CHRIS IMPERIAL

PAGE: 1
REQUISITION NO.: T0454834
ACCESSION NO.: BC856888
ID. NO.: 690-9038
COLLECTION DATE & TIME: 03/19/04 9:14
LOG-IN DATE: 03/19/04
REPORT DATE & TIME: 03/20/04 7:14A

TESTS REQUESTED
COMP METAB PNL, LIPID PROFILE, CBC, PSA, IN MC,

TEST	RESULTS	EXPECTED RANGE
	OUT OF RANGE	WITHIN RANGE
COMPREHENSIVE METABOLIC PANEL		
GLUCOSE	83	
BUN	17	
CREATININE	1.0	
CALCULATED BUN/CREAT	17.0	
SODIUM	142	
POTASSIUM	4.0	
CHLORIDE	105	
CARBON DIOXIDE	27	
CALCIUM	9.2	
PROTEIN TOTAL	7.0	

Performing Quality Control Process - Continued

After clicking the Acrobat icon, the full Acrobat toolbar is now available to you along the top and left side of the Request file. Click the thumbnail icon to see images of all Request file pages.

Quality Control Process

[Save and Exit](#)
[Cancel and Exit](#)

List of pages to exclude. For example to exclude pages 1 and 4, enter 1,4 (Number of pages in this document: 7)

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 COLLEGE STATION, TX 77840

PATIENT NAME	PATIENT ID.	ROOM NUMBER	AGE	SEX	PHYSICIAN
MANSKE, STEPHEN			59	M	CHRIS IMPERIAL

PAGE	REQUISITION NO.	ACCESSION NO.	ID. NO.	COLLECTION DATE & TIME	LOG-IN DATE	REPORT DATE & TIME
1	T0454834	BC856888	690-9038	03/19/04 9:40A	03/19/04	03/20/04 7:14A

TESTS REQUESTED
 COMP METAB PNL, LIPID PROFILE, CBC, PSA SCRNM MC,

TEST	RESULTS		UNITS	EXPECTED RANGE
	OUT-OF-RANGE	WITHIN RANGE		
COMPREHENSIVE METABOLIC PANEL				
GLUCOSE	83		MG/DL	65 - 110
BUN	17		MG/DL	8 - 25
CREATININE	1.0		MG/DL	0.8 - 1.4
CALCULATED BUN/CREAT	17.0			6 - 28
SODIUM	142		MEQ/L	133-146
POTASSIUM	4.0		MEQ/L	3.5 - 5.3
CHLORIDE	105		MEQ/L	97-110
CARBON DIOXIDE	27		MEQ/L	18 - 30
CALCIUM	9.2		MG/DL	8.5-10.5
PROTEIN, TOTAL	7.0		G/DL	6.0-8.4

The thumbnail view is shown here. You may scroll up and down to view thumbnails of each page.

Quality Control Process

[Save and Exit](#)
[Cancel and Exit](#)

List of pages to exclude. For example to exclude pages 1 and 4, enter 1,4 (Number of pages in this document: 7)

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PATIENT NAME	PATIENT ID.	ROOM NUMBER	AGE	SEX	PHYSICIAN
MANSKE, STEPHEN			59	M	CHRIS IMPERIAL

PAGE	REQUISITION NO.	ACCESSION NO.	ID. NO.	COLLECTION DATE & TIME	LOG-IN DATE	REPORT DATE & TIME
1	T0454834	BC856888	690-9038	03/19/04 9:40A	03/19/04	03/20/04 7:14A

TESTS REQUESTED
 COMP METAB PNL, LIPID PROFILE, CBC, PSA SCRNM MC,

TEST	RESULTS		UNITS	EXPECTED RANGE
	OUT-OF-RANGE	WITHIN RANGE		
COMPREHENSIVE METABOLIC PANEL				
GLUCOSE	83		MG/DL	65 - 110
BUN	17		MG/DL	8 - 25
CREATININE	1.0		MG/DL	0.8 - 1.4
CALCULATED BUN/CREAT	17.0			6 - 28
SODIUM	142		MEQ/L	133-146
POTASSIUM	4.0		MEQ/L	3.5 - 5.3
CHLORIDE	105		MEQ/L	97-110
CARBON DIOXIDE	27		MEQ/L	18 - 30
CALCIUM	9.2		MG/DL	8.5-10.5
PROTEIN, TOTAL	7.0		G/DL	6.0-8.4
ALBUMIN	4.2		G/DL	2.9 - 5.0
CALCULATED GLOBULIN	2.8		G/DL	2.0 - 3.8
CALCULATED A/G RATIO	1.50			0.9 - 2.5
BILIRUBIN, TOTAL	0.5		MG/DL	0.1-1.3
ALKALINE PHOSPHATASE	78		U/L	30 - 132
SGOT (AST)	24		U/L	5 - 35
SGPT (ALT)	38		U/L	7 - 56

QA PROCESS Option, Step #3 - Specify pages to be excluded from the Request

No matter how you choose to view the pages in the QA Process Option, you must "Exclude" each page that should NOT appear in the Request file. As the on-screen instructions indicate, you must type the page #s in the text box above the Request file. Individual page #s and page ranges should be separated by a comma with NO space. For example, 1,3,5-7 means that pages 1, 3, 5, 6, and 7 will NOT be sent to the Requestor. Leave the box blank if you want to include all pages from the file.

Quality Control Process

[Save and Exit](#)
[Cancel and Exit](#)

List of pages to exclude. For example to exclude pages 1 and 4, enter 1,4 (Number of pages in this document: 7)

1-7 [Reset](#)

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CAP Accreditation #: 21525-01
 CLIA # 45D0505003

5298
BRAZOS PHYSICIANS GROUP
 1512 HOLLEMAN
 COLLEGE STATION, TX 77840

PATIENT NAME		PATIENT ID.	ROOM NUMBER	AGE	SEX	PHYSICIAN
MANSKE, STEPHEN				59	M	CHRIS IMPERIAL

PAGE	REQUISITION NO.	ACCESSION NO.	ID. NO.	COLLECTION DATE & TIME	LOG-IN-DATE	REPORT DATE & TIME
1	T0454834	BC856888	690-9	03/19/04 9:4	03/19/04	03/20/04 7:14

Total # of pages in original file.

[Save and Exit the QC Process screen.](#)
[Cancel and Exit the QC Process screen.](#)

Click the "Reset" button to the right of the text box to clear the box and start over.

FINALLY, if the invoice must be included in the Request File, click ["Add Invoice to Request."](#) (You may also choose this option on the Log New ROI Request form.)

If the Requestor requires the invoice to be sent with the Request File for payment to be made, click here. The invoice will be sent as the **first page** of the PHI Request File. Blue Cross Blue Shield of Alabama is an example of a Requestor who requires this format for payment.

Status	Request ID	Request Date	Requestor	Patient	DOB	- To	Pages / Included
Incomplete	REQ20140905101629168	9/5/2014	Patient	Burton, Chip	10/11/1952		29 / 0

Resend Notification

ROI Documents related to this request:

Ref	Standard View	Quality Control	Total Pages / Included	Date/Time	Delete
			(All Pages) (No Pages)		
1	<input type="checkbox"/> Request Item 1 (Process)	(QA Process) (All Pages) (No Pages)	3 / 0	9/5/2014 10:18:20 AM	✗
2	<input type="checkbox"/> Request Item 2 (Process)	(QA Process) (All Pages) (No Pages)	1 / 0	9/16/2014 8:10:11 AM	✗
3	<input type="checkbox"/> Request Item 3 (Process)	(QA Process) (All Pages) (No Pages)	3 / 0	2/1/2015 8:04:06 PM	✗

CHAPTER 4.0

CONFIRMING THE REQUEST AS COMPLETE

Confirming that the Request has been completed is the fourth step after **Selecting Pages in Uploaded Files**. Confirming that all of the PHI content has been located and uploaded and that the desired pages have been selected or deselected is the last step prior to notifying the Requestor that their request has been completed.

At the same moment the Request is confirmed as being complete, the ROI+ system will forward either an email or fax notification form to the Requestor based on the information contained in the Requestor profile (which you checked against the written Request in the first stage).

OPTION - You may click to add the invoice to the Request File BEFORE marking it "Complete"

If you wish to include the invoice as the first page of the Request File, click "Add Invoice to Request." This procedure is required by some Requestors, such as Blue Cross Blue Shield of Alabama, for you to receive payment for the fulfillment. **By default, the invoice will be sent separately, unless you click here OR mark the checkbox on the Log New ROI Request form.**

Invoice line appears here when added

[return to results](#)

Status	Request ID	Request Date	Requestor	Patient	DOB	Total Pages / Included
Complete	REQ2014-005101629168	9/5/2014	Patient	Burton, Chip	10/11/1952	29 / 18

[Resend Notification](#)

ROI Documents related to this request:

[Add Invoice To Request](#)

[Add Additional Patient Info](#)

Ref	Standard View	Quality Control	Total Pages / Included	Date/Time	Delete
-	<input type="checkbox"/> Invoice	-	-	9/5/2014 10:18:18 AM	
			(All Pages) (No Pages)		
1	<input type="checkbox"/> Request Item 1 (Process)	(QA Process) (All Pages) (No Pages)	3 / 3	9/5/2014 10:18:20 AM	
2	<input type="checkbox"/> Request Item 2 (Process)	(QA Process) (All Pages) (No Pages)	1 / 1	9/16/2014 8:10:11 AM	
3	<input type="checkbox"/> Request Item 3 (Process)	(QA Process) (All Pages) (No Pages)	3 / 3	2/2/2015 11:43:03 AM	
4	<input type="checkbox"/> Request Item 4 (Process)	(QA Process) (All Pages) (No Pages)	7 / 0	2/2/2015 11:43:06 AM	
5	<input type="checkbox"/> Request Item 5 (Process)	(QA Process) (All Pages) (No Pages)	15 / 11	2/2/2015 11:43:09 AM	
	<input type="checkbox"/> Select All	View Selected PopUp Selected			

[Request is Complete](#)

[Exit to results](#)

STEP #1 - Indicate that the Request has been completed

Click the "Request is Complete" button to confirm that all files have been located, uploaded, and selected, thereby completing the Request.

STEP #2 - Verify Fax #

To avoid a HIPAA breach, you must check right now to ensure that the fax # listed here matches the one on the written Request. If it does not match, correct it here.

STEP #3 - For *Billable* Requests, specify if the invoice is to be sent with the Notification.

The default is to send it. To exclude it, uncheck this box.

For *Non-Billable* Requests, an invoice is NOT sent; therefore, this option will not appear on your screen.

STEP #4 - Confirm completion

Click **“Yes - Request is Complete”** to confirm that you wish to finalize the Request.

OR to cancel the completion . . .

Click **“Cancel”** to cancel the completion process and return to the previous screen.

Request Completion Confirmation

REQ20151001071939199

Please confirm that all required files have been uploaded, proper pages selected, and this request is complete

Notification being faxed to: (555) 555-5555

☒ Include Invoice with Notification


Yes - Request is Complete Cancel

CHAPTER 5.0

AUTOMATIC REQUESTOR NOTIFICATION PROCESS

After you click the **Yes - Request Is Complete** button, the ROI+ system will automatically fax or email a copy of the **PHI REQUEST FULFILLMENT NOTIFICATION** form, shown below, to the Requestor. The Notification informs the Requestor that the request has been completed (fulfilled). It also provides the Requestor with the web address to access the **ROI+ Requestor Portal** as well as the Account Number and PIN needed to log on to the Portal. Inside the Portal, the Requestor can review and pay the Invoice (if Billable) and view the PHI content.

PHI Request Fulfillment Notification SAMPLE

ROI Plus	
YOUR OFFICE HAS REQUESTED A PHI FOR THE PATIENT LISTED BELOW	
PHI REQUEST FULFILLMENT NOTIFICATION	
	
REQ20150130111831883	
Request Date: 1/30/2015	Request ID: REQ20150130111831883
Requestor Name: ABT Vault	Patient Name: Burton,Chip
Requestor Acct: R10068	Patient DOB: xx/xx/xxxx
Requestor PIN: 5445	Patient MRN: 333333333
	Patient ID:
Requestor Contact: ABT Vault Chip Burton 3111 ashlock Any, TX 77802 (832) 541-5155 (p) (810) 963-6833 (f)	Provider Contact: ABT Health, Inc. Chip Burton 4828 Williams Creek Drive College Station, TX 77845 832-541-5155 (p) 810.963.6833 (f) c/o ABT Default
Your office has requested PHI from the Provider listed above. You must go to the website below to view the status and content of both pending and completed ROI requests. WWW.ABTROIPLUS.COM You must use the Requestor Acct # and Requestor Pin # values that appear in the top portion of this notice, along with the Patient Date of Birth, to view the status and content of both pending and completed ROI requests. Complete instructions are available on the website.	
IMPORTANT NOTE: <i>FORWARDING ROI REQUESTS OR PATIENT RECORDS BY MAIL OR FAX EXPOSES PATIENTS TO THE RISK OF IDENTITY THEFT AND EXPOSES PROVIDERS AND REQUESTORS TO LITIGATION FROM PATIENTS WHO SUFFER IDENTITY THEFT. TRANSMITTALS OF ROI REQUEST FORMS AND PATIENT RECORDS CONTAINING CERTAIN CRITICAL INFORMATION (Patient Name, Social Security Number, Date of Birth) THAT ENABLES IDENTITY THEFT SHOULD BE CLOSELY SAFEGUARDED AND TRACKED TO PROTECT PATIENTS, REQUESTORS AND PROVIDERS FROM POTENTIAL LEGAL AND COMPLIANCE LIABILITIES.</i> <i>IF REQUESTOR CHOOSES TO TAKE DELIVERY OF PATIENT RECORDS BY MAIL OR FAX, REQUESTOR HEREBY ACKNOWLEDGES, UPON RECEIPT OF THIS NOTICE, SOLE RESPONSIBILITY FOR ALL CONTINGENT LEGAL AND COMPLIANCE LIABILITIES THAT OCCUR AFTER RECEIPT OF TRANSMITTED PATIENT RECORDS.</i>	

Check the Fax Notification Indicator for delivery status

The color of the exclamation point (“!”) to the left of the Request ID on the ROI Requests tab indicates the delivery status of the fax.

“!” = SUCCESSFUL DELIVERY

“!” = PENDING; TAKING PLACE CURRENTLY

“!” = FAILED DELIVERY

Fax Notification Indicator - Failed

The exclamation point (“!”) to the left of the Request ID is **RED**, meaning that the fax notification process failed.

Ref	Action	Notes	Form		RequestID	Request Status	Request Date	Requestor	Patient Name
1	action		view	!	REQ20150130111831883	+			
2	action		view		REQ20150127182540982	+			
3	action		view		REQ20150123075148100	+			
4	action		view		REQ20150123091634421	+			
5	action		view		REQ20150113102044965	+			
6	action		view		REQ2015011118212067	Complete	1/11/2015	Patient	Burton, Chip
7	action		view		REQ201501101241178	Logged	1/10/2015	Patient	Burton, Chip
8	action		view		REQ201501125108493	Logged	1/10/2015	Patient	Burton, Chip
9	action		view		REQ20141219084702454	Complete	12/19/2014	Patient	Burton, Chip
10	action		view	!	REQ20141215104139378	Complete	12/15/2014	ABT Vault	Burton, Chip
11	action		view	!	REQ20141125112216621	Viewed	11/25/2014	ABT Vault	Burton, Chip
12	action		view	!	REQ20141124071230354	Notified	11/24/2014	ABT Vault	Burton, Chip
13	action		view	!	REQ20141124072717102	Notified C	11/24/2014	ABT Vault	Burton, Chip
14	action		view		REQ20140905101629168	Incomplete	9/5/2014	Patient	Burton, Chip

Fax Notification Indicator - Pending

The exclamation point ("!") to the left of Request ID is **YELLOW**, meaning that the notification process is taking place currently.

Fax Notification Indicator - Pending

The exclamation point (“!”) to the left of the Request ID is **YELLOW**, meaning that the fax notification process is taking place currently.

Fax Notification Indicator - Successful

The exclamation point (“!”) to the left of the Request ID is **GREEN**, meaning that the fax notification process was completed successfully.

Credit Hold Notification

The “C” indicates that one or more invoices for this Requestor is on “Credit Hold.”

CHAPTER 6.0

REJECTING A REQUEST

You will “reject” a request for PHI when you are unable to fulfill it based on the specifications of the original request document.

Common reasons for rejection include the following:

- Patient Record Not Found
- Incomplete Patient Record
- Patient is currently hospitalized
- Patient Treatment cannot be found at this facility
- Verified - Patient Treatment cannot be found at this facility
- ROI Request is older than 90 Days
- Date or Signature appears to be invalid
- Workman's Comp missing form 43
- Workman's Comp needs patient authorization

Note that you must work solely from the original written document sent to you by the Requestor. If the request does not have all of the required elements, you will send the Requestor a **Request Rejection Notice**. This notice tells the Requestor why their request could not be fulfilled.

STEP #1 - Choose the “Reject” action

On the ROI Requests tab, click “**action**” on the relevant Request line and choose “**Reject**” from the yellow pop-up options window (shown below). This action will cause the “**Request Rejection**” form to appear.

Documents Found: 28 Results sorted by: RequestID

Click on the I

Ref	Action	Notes	Form	RequestID	Request Status	Request Date	Optional Reference	Requestor	Pa N
1	action		view	REQ20151012143026403 +	Logged	10/12/2015	test 123,test 456	ABT Vault	Burt
2	action	record 2		Q20150925115931956 +	Logged	9/25/2015		ABT Vault	Burt
3	action	Archive		Q20150925120558190 +	Logged	9/25/2015		ABT Vault	Burt
4	action	Un-Archive		Q20150925120829238 +	Logged	9/25/2015		ABT Vault	Burt
5	action	Reject		Q20150925122348325 +	Logged	9/25/2015		ABT Vault	Burt
6	action	Un-Reject		Q20150925122348325 +	Logged	9/25/2015		ABT Vault	Burt
7	action	Exit		REQ20150923111431900 +	Incomplete	9/23/2015		ABT Vault	Burt
8	action		view	! REQ20150915090524874 +	Complete	9/15/2015		ABT Vault	Burt
9	action		view	REQ20150915133652424 +	Incomplete	9/15/2015		ABT Vault	Burt
10	action		view	! REQ20150908121052852 +	Complete	9/8/2015		ABT Vault	Burt
11	action		view	! REQ20150903045226649 +	Complete	9/3/2015		ABT Vault	Burt

STEP #2 - Specify the reason for Rejection

The “Request Rejection” form states why the request is being rejected. Click the checkbox next to the most appropriate listed reason; however, if none of the listed reasons applies, then click to mark the checkbox for “Other - please specify below” and use the box at the bottom to type an explanation of why the request is being rejected.

Dashboard Show Query Create New Request Help Admin Logout

ROI Requests Requestors Patients Payment Audit

Documents Found: 44

Results sorted by: RequestID

1

Click on the Link below to view the document.

Patient: Burton, Chip (10/11/1952)

Please indicate why this request is being rejected

Ref	Action	Notes	Form
1	action	view	
2	action	view	
3	action	view	
4	action	view	
5	action	view	
6	action	view	
7	action	view	
8	action	view	
9	action	view	
10	action	view	
11	action	view	
12	action	view	
13	action	view	
14	action	view	
15	action	view	
16	action	view	
17	action	view	
18	action	view	
19	action	view	

me	Patient DOB	Invoice Number	Invoice Date	Invoice Amount	Bill Sta
10/11/1952	IN20150130111831883 +	1/30/2015		\$52.50	Billabl
10/11/1952	IN20150127182540982 +	1/27/2015		\$0.00	Billabl
10/11/1952	IN20150123075148100 +	1/23/2015		\$0.00	Billabl
10/11/1952	IN20150123091634421 +	1/23/2015		\$0.00	Non Bi
10/11/1952	IN20150113102044965 +	1/13/2015		\$0.00	Billabl
10/11/1952	IN20150111182120679 +	1/11/2015		\$0.00	Billabl
10/11/1952	IN20150110124324578 +	1/10/2015		\$0.00	Billabl
10/11/1952	IN20150110125108493 +	1/10/2015		\$0.00	Billabl
10/11/1952	IN20141219084702454 +	1/13/2015		\$25.00	Billabl
10/11/1952	IN20141215104139378 +	12/15/2014		\$36.00	Billabl
10/11/1952	IN20141125112216621 +	11/25/2014		\$25.00	Billabl
10/11/1952	IN20141124071230354 +	11/24/2014		\$0.00	Non Bi
10/11/1952	IN20141124072717102 +	12/19/2014		\$25.00	Billabl
10/11/1952	IN20141017061537656 +	10/17/2014		\$0.00	Billabl
10/11/1952	IN20140929083955528 +	9/29/2014		\$0.00	Billabl
10/11/1952	IN20140929084417689 +	9/29/2014		\$0.00	Billabl
10/11/1952	IN2014092908585355 +	9/29/2014		\$0.00	Billabl
10/11/1952	IN20140927091009601 +	9/27/2014		\$25.00	Billabl
10/11/1952	IN20140905101629168 +	9/5/2014		\$25.00	Billabl

Reject Request Cancel

STEP #3 - Add desired options

3a. If desired, check the box to include a copy of the invoice along with the Rejection Notification. Some states allow you to charge the Requestor with a processing/search fee.

3b. If desired, check the box to zero out the invoice amount (set the invoice to \$0 owed) and adjust the Billing Status to Non-Billable.

STEP #4 - Reject the Request

Click the “Reject Request” button to complete the Rejection and send the notification to the Requestor, or click the “Cancel” button to abort the Rejection procedure.

Patient: Burton, Chip (10/11/1952)

☐ Check to Include Invoice w/Reject Notification?

☐ Check to Zero Invoice Amount and set to Non-Billable

Please indicate why this request is being rejected

☐ Patient Record Not Found

☐ Incomplete Patient Record

☐ Patient is currently hospitalized

☐ Patient Treatment cannot be found at this facility

☐ Verified - Patient Treatment cannot be found at this facility

☐ ROI Request is older than 90 Days

☐ Date or Signature appears to be invalid

☐ Workman's Comp missing form 43

☐ Workman's Comp needs patient authorization

☐ Other - please specify below

Reject Request Cancel

STEP #5 - Review the Request Rejection Notice

Review the **“Request Rejection Notice.”** If you clicked the “Reject Request” button, this page was sent to the Requestor as the *second page* of the **“PHI Request Fulfillment Notification.”**

ROI Plus

REQUEST REJECTION NOTICE

This is to acknowledge receipt of your recent inquiry requesting information for the patient identified below. The information you requested is not available because of the reasons listed:

Request and Patient Info:

Request Date:	8/25/2014	Request ID:	REQ20140825071338690
Requestor Name:	ABT Vault	Patient Name:	Burton, Chip xx/xx/xxxx
Requestor Acct:	R10068	Patient DOB:	10/11/1952
Requestor PIN:	5445	Patient MRN:	111111
		Patient ID:	

Request Rejection Reasons:

- ☐ Patient Record Not Found
- ☐ Incomplete Patient Record
- ☐ Patient is currently hospitalized
- ☐ Patient Treatment cannot be found at this facility
- ☐ Verified - Patient Treatment cannot be found at this facility
- ☐ ROI Request is older than 90 Days
- ☐ Date or Signature appears to be invalid
- ☐ Workman's Comp missing form 43
- ☐ Workman's Comp needs patient authorization
- ☒ Other - additional information specified below:

Request is missing a Contact Name and Requestor Address.

STEP #6 - Verify that Record Type has been set to “Rejected”

The Record Type is automatically set to **“Rejected”** once the Rejection Form has been completed. To verify this change, follow the instructions below.

6a. Go to the ROI Requests tab, choose “Rejected Active” as the Record Type in the Query section, and click “Search.”

The screenshot shows the ROI+ web application interface. The 'ROI Requests' tab is selected. The 'Patient Quick Search - 8' section is visible, showing a grid of letters (A-Z) for filtering. Below this, there are search criteria fields for RequestID, Requestor, Request Date, Invoice Number, Invoice/Complete Date, Request Status, Patient Name, Patient MRN, Patient DOB, Date Paid, Paid Status, and Optional Reference. At the bottom, there are filters for Request Type, Billing Type, Delivery Type, and Record Type (set to 'Rejected Active'). The 'Search' button is highlighted.

Rejecting a Request - Continued

6b. In your Results List, you will see a list of Rejected items only, denoted by an “R” to the right of the Request Status for each item. Check to ensure that your Request is listed here.

Dashboard | Show Query | Create New Request | Help | Admin | Logout

ROI Requests | Requestors | Patients | Payment | Audit

Documents Found: 7

Results sorted by: Requestor

1

Click on the Link below to view the document.

Ref	Action	Notes	Form	RequestID	Request Status	Request Date	Optional Reference	Requestor	Patient Name	Patient DOB	
1	action	view	view	! REQ20151008110611110 +	Complete R	10/8/2015	test	ABT Vault	Burton,Chip	10/11/1952	IN201
2	action	view	view	! REQ20150330101552482 +	Complete R	3/30/2015		ABT Vault	Burton,Chip	10/11/1952	IN201
3	action	view	view	! REQ20141113164930166 +	Notified R	11/13/2014		ABT Vault	Burton,Chip	10/11/1952	IN201
4	action	view	view	! REQ20141105101020796 +	Notified R	11/5/2014		ABT Vault	Burton,Chip	10/11/1952	IN201
5	action	view	view	! REQ20140825071338690 +	Complete R	8/25/2014		ABT Vault	Burton,Chip	10/11/1952	IN201
6	action	view	view	! REQ20140815071131697 +	Notified R	8/15/2014		ABT Vault	Burton,Chip	10/11/1952	IN201
7	action	view	view	! REQ20140701081847706 +	Rejected R	7/1/2014		Patient	Burton,Chip	10/11/1952	IN201

CHAPTER 7.0

EDITING AN EXISTING REQUEST

You will “edit” an existing Request for PHI when the original information you entered on the Log New ROI Request form needs to be corrected. Editing can occur at any point in the Request fulfillment process.

You might need to edit a Request for many reasons, including the following:

- choosing the wrong Request Type (for example, “Continuing Care” rather than “Legal”)
- choosing the wrong Billing Type (for example, “Non-Billable - Release for Viewing” rather than “Billable - UnPaid”)
- choosing the wrong Requestor or Patient

Whenever you edit a Request, you should add a note in the system to explain the reason for your edit(s).

STEP #1 - Search for the relevant Request in the ROI Requests tab

In the ROI Requests tab, you may click “Search” in the Query section to bring up a list of the most recently completed items. However, if the Request was not processed or updated recently, you might locate it more quickly by searching on Patient Name or Request ID.

The screenshot shows the ROI+ system interface. At the top, there's a navigation bar with links like Dashboard, Hide Query, Create New Request, Help, Admin, and Logout. Below this, there's a tabbed interface with 'ROI Requests' selected. The main area contains a search form with various filters: RequestID (ENDS WITH), Requestor (BEGINS WITH), Request Date (EQUALS), Invoice Number (BEGINS WITH), Invoice/Complete Date (EQUALS), Request Status (EQUALS), Patient Name (BEGINS WITH), Patient MRN (BEGINS WITH), Patient DOB (EQUALS), Date Paid (EQUALS), Paid Status (EQUALS), and Optional Reference (CONTAINS). There are also dropdowns for Request Type, Billing Type, Delivery Type, and Record Type. At the bottom, there are buttons for Search, Export, and Clear, along with sorting options (asc, desc) and a Results Per Page selector set to 50.

STEP #2 - Click the relevant line # in the “Ref” column


Click the line # for the Request you need to edit. This action will cause the completed “Log New ROI Request” form to appear.


Ref	Action	Notes	Form	RequestID	Request Status	Request Date	Optional Reference	Requestor
1	action		view	REQ20150925115931956 +	Logged	9/25/2015	test 123	ABT Vault
2	action		view	REQ20150925120558190 +	Logged	9/25/2015		ABT Vault
3	action		view	REQ20150925120829238 +	Logged	9/25/2015		ABT Vault
4	action		view	REQ20150925122348325 +	Logged	9/25/2015		ABT Vault
5	action		view	REQ20150923111431900 +	Incomplete	9/23/2015		ABT Vault
6	action		view	REQ20150915090524874 +	Complete	9/15/2015		ABT Vault

STEP #3 - Edit the existing information as needed

Edit Existing ROI Request


ROI Request Information

Provider: 

Request Type:  [Request Type Help?](#)

Patient Name: [Add new patient](#)


Requestor: [Add new requestor](#)


Contact:  [Add new contact](#)

Fax Number:
(nnn) nnn-nnnn WARNING: Sending Patient records to an incorrect fax # is a breach of Patient confidentiality!!! Are you sending this Request package to the correct fax #? Compare the fax # here to the fax # on the original Request document.

Dates of Service: mm/dd/yyyy
 From To

Optional Reference:

Billing Type: 
☐ Include the Invoice as the first page in the Request Release

Delivery Type: 

Request Summary Information

Request Type: Audit
 Patient: Burton,Chip
 Requestor: ABT Vault

Save & Log Another Request

Save & Go to Upload

Save & Exit to Result List

Exit Without Saving

Be advised that the Requestor contact information contained in the PHI REQUEST FULFILLMENT NOTIFICATION is originated by Providers, not ABT Global, Inc. Thus, ABT Global, Inc. makes no guarantee as to the accuracy of the Requestor contact information contained in the PHI REQUEST FULFILLMENT NOTIFICATION. By generating the PHI REQUEST FULFILLMENT NOTIFICATION, you agree that confirming the accuracy of all Requestor contact information contained therein remains your sole responsibility as a Provider and that ABT Global, Inc. is not responsible for any errors or omissions in Requestor contact information, whether or not that information is relied upon by you or other Providers.

STEP #4 - Click the "Update Request" button

Click one of the first three buttons (depending upon what you would like to do next) to save your updates. An updated **PHI Request Fulfillment Notification Form** will be created. **If your correction affected the Invoice (such as changing Non-Billable to Billable), the Invoice will be updated automatically, but the invoice will not be sent out until you either finish re-processing and click "Request is Complete" or until you act to "Resend Notification."**

To completely cancel your updates and leave the "Edit Existing ROI Request" screen, click **"Exit Without Saving."**

STEP #5 - Verify your updates in ROI Requests tab

On the ROI Results tab, find the relevant Request. Based on the types of changes you made, you might see changes to the Fax Notification Indicator color (and the associated fax log that appears when you click the indicator), the Request ID color, the Request Status, the Billing Type, the Invoice Amount, and/or the Billing Status. You may also view the updated PHI Request Fulfillment Notification and the Invoice (if updated).

Ref	Action	Notes	Form	RequestID	Request Status	Request Date	Optional Reference	Requestor	Patient Name	Patient DOB	Invoice Number	Invoice/Complete Date	Invoice Amount	Billing Status
1	action		view	REQ20151012143026403 +	Logged	10/12/2015	test 123, test 456	ABT Vault	Burton, Chip	10/11/1952	IN20151012143026403 +	10/12/2015	\$0.00	Billable
2	action		view	REQ20150925115931956 +	Logged	9/25/2015	test 123	ABT Vault	Burton, Chip	10/11/1952	IN20150925115931956 +	9/25/2015	\$0.00	Non Billable
3	action		view	REQ20150925120558190 +	Logged	9/25/2015		ABT Vault	Burton, Chip	10/11/1952	IN20150925120558190 +	9/25/2015	\$0.00	Billable
4	action		view	REQ20150925120829238 +	Logged	9/25/2015		ABT Vault	Burton, Chip	10/11/1952	IN20150925120829238 +	9/25/2015	\$0.00	Disability-Non Billable
5	action		view	REQ20150925122348325 +	Logged	9/25/2015		ABT Vault	Burton, Chip	10/11/1952	IN20150925122348325 +	9/25/2015	\$0.00	Billable
6	action		view	REQ20150923111431900 +	Incomplete	9/23/2015		ABT Vault	Burton, Chip	10/11/1952	IN20150923111431900 +	9/23/2015	\$0.00	Billable

STEP #6 - Add a note giving the reason for your edit(s)

See Chapter 12: Adding a Note for instructions.

Ref	Action	Notes	Form	RequestID	Request Status
1	action		view	REQ20150209140705622 +	Complete
2	action		view	REQ20150130111831883 +	Notified
3	action		view	REQ20150127182540982 +	Logged
4	action		view	REQ20150123075148100 +	Logged

CHAPTER 8.0

ADMINISTRATION MODULE

The **Administration Module** governs who has access to a given ROI+ account and what feature/function privileges they can execute. There are three (3) sections to the Administration Module: **Groups**, **Users**, and **Misc**. The first two steps that need to be taken after ABT Medical sets up an ROI+ account are to **Add New User(s)** and **Add New Group(s)**. You will be using the following templates to enter the required information:

STEP ONE - ADD NEW USER(S)

The screenshot shows the ROI+ Administration Module navigation bar. It is divided into three main sections: **Groups**, **Users**, and **Misc**. The **Users** section is currently active. Callouts point to the 'Add New User(s) into the Administration Module' button in the **Users** section and the 'EXIT the Administration Module and return to the ROI Requests tab' button in the **Misc** section.

Groups	Users	Misc
Add New Group - List Groups	Add New User - Search Users - List Users - List ALL Users	Archive - Applications - Log Out

ADD NEW USER TEMPLATE

The screenshot shows the 'ADD NEW USER TEMPLATE' form. It contains fields for LoginID, Full Name, Department, Group, Email, Password, Confirm Password, Password Rules, Password Duration, and Account Enabled. A callout points to the 'Group' dropdown menu, stating: 'Users can be assigned to a different Group at a later time.'

LoginID:	aadams	*
Full Name:	Albert Adams	*
Department:	Medical Records	*
Group:	Request Processing	*
Email:	aadams@anyprovider.com	*
Password:	*****	*
Confirm Password:	*****	*
Password Rules: Minimum length of 6 containing at least (2 Alpha - 1 Numeric - 0 Special), First and Last Characters Alpha		
Password Duration:	1 Year	*
Account Enabled:	<input checked="" type="checkbox"/>	*
<input type="button" value="ADD"/> <input type="button" value="CANCEL"/> <input type="button" value="RESET"/>		

1. **Login ID** - a unique 1st part for access validation identifier for each User
2. **Full Name** - the full name for this User
3. **Department** - an optional entry dependent upon the relationship of the User to the organization
4. **Group** - select the Group that contains the feature/functionality privileges (rights) to be assigned to the User
5. **Email** - the email address for this User
6. **Password** - the 2nd part for access validation (note that the password has very specific formatting rules)
7. **Confirm Password** - required second entry to ensure password is entered as intended
8. **Password Duration** - the length of time before the current Password expires
 - 8.1. The **Expiration Date** will appear once the New User has been added
9. **Account Enabled** - determines whether or not the User is Enabled to log in to ROI+
 - 9.1. There may be Users that only need Login privileges on a periodic basis
10. **ADD** - clicking on this button will **Add** this **New User** to the **Administration Module**
11. **CANCEL** - clicking on this button will **Cancel** the **Add New User** entry process
12. **RESET** - when Adding a New User, clicking on this button will clear the template
 - 12.1. When **Modifying** an existing **User**, clicking on this button will Reset all edited values back to their original state

Once you have **Added a New User(s)**, then click on the **List Users** option to insure the **New User** is in the **Administration Module** (see below).

ROI +

Will list Users in the Administration Module.

Groups	Users	Misc
Add New Group - List Groups	Add New User - Search Users - List Users - List ALL Users	Archive - Applications - Log Out

Will delete a specific User from the Administration Module.

Total Users:1 Displayed:1

1

#	LoginID	Full Name	Department	Email	Group	Enabled	EDIT	DELETE
1	aadams	Albert Adams	Medical Records	aadams@anyprovider.com	Administration	Yes	Edit	Delete

1

Will enable you to Edit a specific User in the Administration Module.

LISTING OF ALL USERS

1

#	LoginID	Full Name	Department	Email	Group	Enabled	EDIT	DELETE
1	aadams	Albert Adams	Medical Records	aadams@anyprovider.com	Administration	Yes	Edit	Delete
2	abtsupport	ABT Support	Support	dwhite@abtvault.com	Administration	Yes	Edit	Delete
3	aford	Angela Ford	ABT Support	aford@abtvault.com	Administration	Yes	Edit	Delete
4	cburton	John Chip Burton	ABT	cburton@abtvault.com	Administration	Yes	Edit	Delete

STEP TWO - ADD NEW GROUP(s)

Groups represent a group of **Users** who are entitled to share the same feature/functionality privileges (rights) within the ROI+ system. Groups can be established before or after Adding New Users.

ADD NEW GROUP TEMPLATE

Add New Group(s) into the Administration Module

ROI+

Groups	Users	Misc
Add New Group - List Groups	Add New User - Search Users - List Users - List ALL Users	Archive - Applications - Log Out

Group Name:	Request Processing
Group Description:	Processing all Request into ROI+
Group Enabled:	<input checked="" type="checkbox"/>
<input type="button" value="ADD"/> <input type="button" value="CANCEL"/> <input type="button" value="RESET"/>	

1. **Group Name** - the name of the Group
2. **Group Description** - a more definitive description of the Group (optional)
3. **Group Enabled** - determines whether or not the User is enabled to log in to ROI+
 - 3.1. There may **Groups** that only need specific feature/functionality privileges on a periodic basis
4. **ADD** - clicking on this button will **Add** this **New Group** to the **Administration Module**
5. **CANCEL** - clicking on this button will **Cancel** the **Add New Group** entry process
6. **RESET** - when Adding a **New Group**, clicking on this button will clear the template
 - 6.1. when **Modifying** an existing **Group**, clicking on this button will Reset all edited values to their original state

STEP THREE - ADD USER(s) TO A GROUP

ADDING USERS TO A GROUP

Click on List Groups

ROI+

Groups	Users	Misc
Add New Group - List Groups	Add New User - Search Users - List Users - List ALL Users	Archive - Applications - Log Out

SortValue: Group Name

Total Groups:5 Displayed:5
1

Click Access to bring up the Group Info template

#	Group Name	Group Description	Enabled	EDIT	ACCESS	DELETE
1	Administration	All Apps + Admin	Yes	Edit	Access	Delete
2	Documentation	All Tabs Except Administration	Yes	Edit	Access	Delete
3	R&A	View Requests and Audit tabs	Yes	Edit	Access	Delete
4	Reference Only	ROI Request Tab Only	Yes	Edit	Access	Delete
5	Request Processing	Processing all Request into ROI+	Yes	Edit	Access	Delete

1

The term **ACCESS** defines what feature/functionality privileges (rights) each Group enjoys and, by extension, what each User in the Group enjoys. Upon clicking the **ACCESS** option for a given Group, the following template will appear. There are two sections to defining Group Attributes (privileges). The first is **Applications** and the second is **Users**. Limit the **Administration Group** to only those few Users who are trustworthy to set privileges for other Users correctly.

STEP FOUR - APPLICATIONS

SELECTING APPLICATION TEMPLATE

The screenshot shows a web interface for Group Info. At the top is a 'return' link. Below it is the 'Group Info' header. The main content area is divided into two sections: 'Group Attributes' and 'Applications'. Under 'Group Attributes', there are fields for 'Administration: NO' and 'Enabled: YES'. The 'Applications' section is currently selected and highlighted in blue. Below it, there are links for 'None', 'Users', and 'None'. At the bottom is another 'return' link. A yellow callout bubble points to the 'Applications' section with the text: 'Click on the Applications option'.

SETTING GROUP APPLICATION PRIVILEGES

There are five (5) sections of Application privileges. For the Group called Request Processing, the only feature/functionality privileges granted are those needed to process requests for patient records, not including the ability to export transactions records reflecting all request processing statistics.

The screenshot shows a web interface for Group Application Privileges. At the top is an 'Info' header. Below it is the 'Group: Request Processing - Processing all Request into ROI+' header. The main content area is divided into five sections, each with an 'Application' and 'Features' section. The first section is 'ROI Requests' with features 'delete', 'edit', and 'export'. The other four sections are 'Requestors', 'Patients', 'Payment', and 'Audit', each with their own 'Features' section. A yellow callout bubble points to the 'ROI Requests' section with the text: 'Mark boxes to enable ROI Requests privileges which include: (1) Create New Requests (2) Upload files to ROI+ (3) Perform Quality Assurance reviews (4) Mark requests as completed (5) Reject and un-reject requests (6) Archive and un-archive requests (7) Edit invoices (8) Edit the Create New Request form But does not include the ability to Export the results of any search on Request processing transaction activity.' At the bottom, there is a red text prompt: 'Check all applications and features that are to be available to this group'. Below this are three buttons: 'Update', 'Cancel', and 'Reset'.

UPDATE - clicking this button will enable all the selected privileges to go into effect

CANCEL - clicking this button will cancel the setting Group Application privileges and return to the Group Info template

RESET - clicking this button will clear all boxes that have been checked

The remaining four (4) sections of Application privileges are detailed below:

Requestors - this refers to all actions that occur within the **Requestors** tab (see screen schematics section)

Patients - this refers to all actions that occur within the **Patients** tab (see screen schematics section)

Payment - this refers to all actions that occur in the **Payment** tab (see screen schematics section)

Audit - this refers to all actions that occur in the **Audit** tab (see screen schematics section)

STEP FIVE - ARCHIVING

What is Archiving?

Archiving is a process of placing selected ROI+ request transaction records into a private “view only” state. An ROI+ request transaction record is archived either by marking it as **Archived** in the **Request tab** (see image below) or being automatically archived, as we will discuss in this section of **ROI+ Administration options**.

Ref	Action	Notes	Form	RequestID	Request Status	Request Date	Requestor	Patient Name
1	action		view	REQ20140320073842405 +	Rejected A	3/20/2014	Patient	Burton,Chip
2	action		view	REQ20140318110806156 +	Complete A	3/18/2014	Patient	Burton,Chip
3	action		view	REQ20140304152136428 +	Logged A	3/4/2014	ABT Vault	Smith JR,Elvin E
4	action		view	REQ20140303101243728 +	Viewed A	3/3/2014	ABT Vault	Burton,Chip

The gray letter “A” to the immediate right of the Request Status value indicates the records has been marked for Archive.

ROI+ request transaction records that have been marked for **Archive** will not be displayed in the **ROI Requests tab** search Result List unless you specifically indicate that you want to search for Archived transactions. In addition, ROI+ request transaction records marked for Archive will not appear in the **ROI+ Requestor portal**. The basic intent of Archiving is to keep records that are deemed as “no longer pertinent” from cluttering up the listing of ROI+ request transaction records that are still relevant to either the Provider or the Requestor with the bias of relevancy being in the sole discretion of the Provider. In summary, ROI+ request transaction records can be marked for **Archive manually**, one at a time, in the **ROI Requests tab** or **automatically Archived** based on specific event and date schedules in the **Archive section** of the **ROI+ Administration tab**.

SELECTING ARCHIVE TEMPLATE

ROI+

Enable automatic Archive settings

Groups		Users				Misc	
Add New Group	List Groups	Add New User	Search Users	List Users	List ALL Users	Archive	Applications - Log Out

SETTING ARCHIVE THRESHOLDS

VERY IMPORTANT!

Auto Archive runs every Sunday at 1:00am PST
All setting changes will take affect at the next scheduled run time

Self-explanatory

Note: An Archived Request can be un-archived at any time

#	Archive Type	Days Since Completion	Enabled	Details
1	Completed and Viewed	30	Yes	Any Request that has been Completed and Viewed (Excludes all Unpaid Billable requests)
2	Notified DDS Disability	90	Yes	Any DDS Disability Type Requests that have been Notified
3	Completed Non Billable & Not Viewed	120	Yes	Any Non Billable Requests that has been Completed but NOT Viewed
4	Completed Billable & Not Viewed	45	No	Any Billable Requests that has been Completed but NOT Viewed
#	Archive Type	Days Since Creation	Enabled	Details
5	Incomplete	90	No	Any Incomplete Request

Select from pull-down menu**Select from pull-down menu**

There are five (5) **Archive Types** which we will expand on:

1. **Completed and Viewed** - The conditions of this status indicate that both the Provider and Requestor have no further active need for the record.
 - 1.1. **Includes** requests labeled as **Paid & Non-Billable**
 - 1.2. **Excludes** requests labeled as **Unpaid-Billable**
2. **Notified DDS Disability** - Once Disability records have been successfully transmitted to the Social Security Administration (SSN) servers, SSN will transmit those records to the individual State Disability Determination Services (DDS) department's members.
 - 2.1. Since it takes **DDS** an average of **30-60 days** to pay for request records they have received, you should mark the **Days Since Completed** value to **no less than 90**, so as to be able to track **DDS Unpaid-Viewable** records.
3. **Completed Non-Billable - Non-Billable** requests that have been **Completed** but **Not Viewed** are often **Continuing Care** requests that have a short half-life value to the Requestor.
 - 3.1. Historically, fifty percent (50%) of all **Continuing Care** requests **are never viewed** by the Requestor.
4. **Completed Billable and Not Viewed** - **Billable** requests **Not Viewed** by the Requestor generally will require an aggressive collection or suspension action after 60 days from the date of completion.
 - 4.1. Therefore, these records should probably not have a **Days Since Completed** value of **no less than 120 days**.
5. **Incomplete** - These are requests that are in various stages of process but have never been marked as Complete. This is a subjective Archive Type in that incomplete requests should, over a period of time, be marked Rejected unless there are extenuating circumstances.

CHAPTER 9.0

POSTING A PAYMENT

Requestors can pay for fulfillments through the online Requestor Portal and view the requested PHI immediately — if the relevant Provider has subscribed to online payment processing. If the Requestor pays offline with a check, cash, or credit card, you must post that payment in the ROI+ system in a timely manner. Only then can the Requestor access the requested PHI. You can also release the PHI for viewing without (or prior to) payment, if appropriate. Any actions related to payments should be documented in Notes.

STEP #1 - Identify the relevant Request in the Payment tab

Posting a payment in either the Payment tab or the ROI Requests tab requires user permission. If you have permission, you will see the Payment tab as an option. Click the tab; then use the Query box to search for the relevant Request. The most frequent searches are either by Patient or by Invoice Amt.

The screenshot shows the ROI+ system interface. At the top, there are tabs for 'ROI Requests', 'Requestors', 'Patients', 'Payment', and 'Audit'. The 'Payment' tab is selected. Below the tabs, there is a search bar with various filters: Patient (CONTAINS), Invoice Amt (EQUALS), Invoice Date (EQUALS), Billing Type (EQUALS), Aging (Any), Paid Status (Unpaid), Record Type (Active Only), Requestor (CONTAINS), Invoice Number (CONTAINS), Paid Date (EQUALS), SSA REQID (BEGINS WITH), and Optional Ref (CONTAINS). The 'Query' button is visible at the bottom right of the search area.











STEP #2 - Click “Payment Option” in the Payment column

Ref	Notes	Payment	Patient	Invoice Amt	Invoice Date	Aging
1		Payment Option	Burton,Chip (10/11/1952)	\$0.00	4/18/2015	178
2		Payment Option	Burton,Chip (10/11/1952)	\$25.00	8/5/2015	69
3		Payment Option	Burton,Chip (10/11/1952)	\$50.00	8/25/2015	49
4		Payment Option	Burton,Chip (10/11/1952)	\$46.00	8/26/2015	48

STEP #3a - Select the correct option

Ref	Notes	Payment	Patient
1		Check	Set to Paid Burton,Chip (10/11/1952)
2		Payment Option	Select Payment Option Burton,Chip (10/11/1952)
3		Check	Select Payment Option Burton,Chip (10/11/1952)
4		Credit Card	Select Payment Option Burton,Chip (10/11/1952)
5		Cash	Select Payment Option Burton,Chip (10/11/1952)
		Credit Hold	Select Payment Option Burton,Chip (10/11/1952)
		Release for Viewing	Select Payment Option Burton,Chip (10/11/1952)
		Set to UnPaid	Select Payment Option Burton,Chip (10/11/1952)
		Payment Option	Select Payment Option Burton,Chip (10/11/1952)

STEP #3b - Click the resulting action button

Ref	Notes	Payment	Patient
1		<div>Check </div> <div>Set to Paid</div>	Burton,Chip (10/11/1952)
2		<div>Payment Option </div> <div>Select Payment Option</div>	Burton,Chip (10/11/1952)
3		<div>Payment Option </div> <div>Select Payment Option</div>	Burton,Chip (10/11/1952)
4		<div>Payment Option </div> <div>Select Payment Option</div>	Burton,Chip (10/11/1952)
5		<div>Payment Option </div> <div>Select Payment Option</div>	Burton,Chip (10/11/1952)

STEP #4 - Verify changes in the Paid Status and Payment Type columns

Paid Status	Paid Date	Billing Type	Payment Type
Paid	10/13/2015	Billable	Check

STEP #5 - Add a note to document what was done

Include relevant information, such as the Requestor's check #, type of credit card, or the reason you released an item for viewing without payment if it is Billable.

Ref	Notes	Payment	Patient
1		<div>Payment Option </div> <div>Select Payment Option</div>	Burton,Chip (10/11/1952)

CHAPTER 10.0

PLACING A REQUESTOR ON CREDIT HOLD

Using the ROI+ Payment tab, you can manage your accounts receivable. When a Requestor has not paid you within a reasonable timeframe for one or more Requests, you might choose to place the Requestor on **Credit Hold**. Unpaid items over 30 days old have a 70% chance of never being paid without vigorous collection action. Placing a Requestor on Credit Hold is the most effective collection action.

Placing a Requestor on Credit Hold offers the following benefits:

- ❖ You can communicate to everyone that there is a payment issue with a specific Requestor.
- ❖ You will be warned whenever you begin to log a new request for a delinquent Requestor, so you can respond appropriately. (***The Credit Hold alert system must be enabled on your account for this feature to work.***)
- ❖ An “overdue” notice is sent to the Requestor to alert them of the payment issue.

STEP #1 - Identify the relevant Request in the Payment tab

If you have permission to access the Payment tab, you will see the tab. Click the tab; then use the Query box to search for the relevant Request(s). For instance, you might search for all items beyond a certain age by using the Aging field.

ROI+ Admin Logout

ROI Requests Requestors Patients **Payment** Audit

P0000-0 ABT Health, Inc. >>NEXT Click for Help

Patient: CONTAINS Requestor: CONTAINS

Invoice Amt: EQUALS Invoice Number: CONTAINS

Invoice Date: EQUALS Paid Date: EQUALS

Billing Type: EQUALS Billable SSA REQID: BEGINS WITH

Aging: Any Payment Type: Any Optional Ref: CONTAINS

Paid Status: Unpaid Record Type: Active Only

Results Per Page: 50 Sort Value: Patient asc desc Search Export Clear

Virtual Terminal for CC Payment

STEP #2 - Click “Payment Option” in the Payment column

Ref	Notes	Payment	Patient	Invoice Amt	Invoice Date	Aging
1		Payment Option	Burton,Chip (10/11/1952)	\$0.00	4/18/2015	178
2		Payment Option	Burton,Chip (10/11/1952)	\$25.00	8/5/2015	69
3		Payment Option	Burton,Chip (10/11/1952)	\$50.00	8/25/2015	49
4		Payment Option	Burton,Chip (10/11/1952)	\$46.00	8/26/2015	48

STEP #3a - Select "Credit Hold"

Ref	Notes	Payment	Patient	Invoice Amt	Invoice Date	Aging
1		Payment Option	Select Payment Option	Burton,Chip (10/11/1952)	\$25.00	1/13/2015 273
2		Payment Option	Select Payment Option	Burton,Chip (10/11/1952)	\$58.50	2/3/2015 79
3		Check	Select Payment Option	Burton,Chip (10/11/1952)	\$0.00	4/18/2015 178
4		Credit Card	Select Payment Option	Burton,Chip (10/11/1952)	\$25.00	8/5/2015 69
5		Cash	Select Payment Option	Burton,Chip (10/11/1952)	\$32.50	8/7/2015 0

STEP #3b - Click the resulting "Set to Credit Hold" button

Ref	Notes	Payment	Patient	Invoice Amt	Invoice Date	Aging
1		Credit Hold	Set to Credit Hold	Burton,Chip (10/11/1952)	\$25.00	1/13/2015 273
2		Payment Option	Select Payment Option	Burton,Chip (10/11/1952)	\$58.50	2/3/2015 79
3		Payment Option	Select Payment Option	Burton,Chip (10/11/1952)	\$0.00	4/18/2015 178
4		Payment Option	Select Payment Option	Burton,Chip (10/11/1952)	\$25.00	8/5/2015 69
5		Payment Option	Select Payment Option	Burton,Chip (10/11/1952)	\$32.50	8/7/2015 0

STEP #4 - Verify changes in the Payment tab

1. "C" appears in the Status column (also in ROI Requests tab)
2. "Credit Hold" appears under Payment Type

Status	Paid Status	Paid Date	Billing Type	Payment Type
Complete-C	UnPaid		Billable	Credit Hold

CREDIT HOLD DETAILS:

Once a Requestor is placed on Credit Hold, an alert will appear on the "Log New ROI Request" form whenever you select that Requestor for a new request. The new request will *automatically* be placed on Credit Hold. (Older requests must be put on Credit Hold *manually*.)

An "OVERDUE" watermark will appear on invoices for any items on Credit Hold.

To remove the Credit Hold, choose any other Payment Type in the Payment tab.

Contact:

 [Add new contact](#)
ALERT: Current Requestor on Credit Hold

CHAPTER 11.0

EDITING AN INVOICE

The ROI+ system automatically counts the number of pages in your Request and creates an invoice based on current state ROI fee statutes plus how you have classified the Request; you may then customize the invoice further. Later, if you discover a mistake or need to update the invoice, you have the freedom to edit it at any point.

You might need to edit an invoice for many reasons. Here are a few reasons:

- ❖ correct the Billing Type (such as “Non-Billable” to “Billable”)
- ❖ add a fee (such as notarization or certification fees)
- ❖ add information that the Requestor requires for processing (such as a Case #)
- ❖ send a finished invoice if the original invoice was sent prematurely
- ❖ issue an adjustment in a specific instance
- ❖ adjust the total page count by subtracting the number of pages in the original Request document.

Whenever you edit an invoice, you should add a Note in the system to explain the reason for your edit(s).

STEP #1 - Search for the relevant invoice in the ROI Requests tab

In the ROI Requests tab, you may click “Search” in the Query section to bring up a list of the most recent items. You can also search quickly by entering the Patient Last Name (“Begins With” search), the last few digits of the Invoice Number (“Ends With” search), or an Optional Reference (“Contains” search).

STEP #2 - Click the “+” sign next to the Invoice Number

In the Invoice Number column, click the “+” sign next to the relevant Invoice Number to open the invoice for editing. This action will display the “Invoice Review and Adjustment” screen.

Ref	Action	Notes	Form	RequestID	Request Status	Request Date	Optional Reference	Requestor	Patient Name	Patient DOB	Invoice Number	Invoice/Complete Date	Invoice Amount	Billing Status
1	action	view		REQ20151012143026403	Logged	10/12/2015	test 123, test 456	ABT Vault	Burton, Chip	10/11/1952	IN20151012143026403	10/12/2015	\$0.00	Billable
2	action	view		REQ20150925115931956	Logged	9/25/2015	test 123	ABT Vault	Burton, Chip	10/11/1952	IN20150925115931956	9/25/2015	\$0.00	Non Billable
3	action	view		REQ20150925120558190	Logged	9/25/2015		ABT Vault	Burton, Chip	10/11/1952	IN20150925120558190	9/25/2015	\$0.00	Billable
4	action	view		REQ20150925120829238	Logged	9/25/2015		ABT Vault	Burton, Chip	10/11/1952	IN20150925120829238	9/25/2015	\$0.00	Disability-Non Billable
5	action	view		REQ20150925122348325	Logged	9/25/2015		ABT Vault	Burton, Chip	10/11/1952	IN20150925122348325	9/25/2015	\$0.00	Billable
6	action	view		REQ20150923111431900	Incomplete	9/23/2015		ABT Vault	Burton, Chip	10/11/1952	IN20150923111431900	9/23/2015	\$0.00	Billable

STEP #3 - Edit the existing information as needed

On the left side of the screen, you may adjust the invoice in any of the categories shown and/or add your own adjustments at the bottom.

The screenshot shows the 'Invoice Review and Adjustment' interface. On the left, there are input fields for various invoice details. On the right, there is an 'Invoice' summary section. At the bottom, there are buttons for 'Update Invoice Info', 'Exit', and 'Cancel'.

Callout 1 (Note): This space can be used to type a text note, such as a request document control number issued by entities such as EMSI, DDS, and insurance companies. This type of notation can be of great value when attempting to reconcile payments. You **MUST** enter a Units value of "1" to enable the text note to appear on the Invoice.

Callout 2: Click "Cancel" to return to ROI Results tab without saving your edits.

Callout 3: Click "Update Invoice Info" to save your updates. Updates will NOT be saved otherwise. The invoice will be adjusted automatically on the right side of your screen. The invoice will not be re-sent unless you "Resend Notification" (see Chapter 13).

Callout 4: Click "Exit" to return to ROI Results tab

Form Fields:

- Billing Provider Class: Physicians
- Invoice Number: IN20150209140705622
- Invoice Date: 2/9/2015
- Invoice Subtotal Amount: \$25.00
- Invoice Adjusted Amount: (\$0.00)
- Invoice Amount: \$25.00
- Number of Paper Pages: 2
- Number of Microfilm Pages: 0
- Number of Electronic Pages: 0
- XRays and Diagnostic Images: 0
- Workers Comp Paper Count: 0
- Workers Comp Microfilm Count: 0
- Workers Comp Narrative Report Prep: 0
- Workers Comp Narrative Report Copies: 0
- Affidavits: 0
- Notary Requests: 0
- Billing: Billable

Invoice Summary:

- Remit To: ABT Health, Inc., Chip Burton, 4628 Milliken Creek Drive, 76445 (f)
- Invoice Number: IN20150209140705622
- Invoice Date: 2/9/2015
- Provider Acct No: P0000-0
- Requestor Acct No: R10068
- Requestor PIN: 5445
- Request Date: 2/9/2015
- Request ID: REQ20150209140705622
- Patient Name: Burton, Chip
- Patient DOB: 10/11/1952

Additional Charges Table:

ID	Description	Units	Cost Per Unit
Additional Charges 1:		0	0
Additional Charges 2:		0	0
Additional Charges 3:		0	0

Invoice Line Item:

Quantity	Description	Rate	Amount
1	1st 20 pages @ \$25 per Texas 162.5	\$25.00	\$25.00
1	Billable		

Summary:

- Subtotal: \$25.00
- Adjustment: - \$0.00
- TOTAL: \$25.00

Contact Information:

- Phone #: 1-5155
- Fax #: 810.963.8833
- Email: cburton@abtvault.com
- Web Site: www.abtplus.com

STEP #4 - Click "Update Invoice Info"

Click "Update Invoice Info" to save your updates. Updates will NOT be saved otherwise. The invoice will be adjusted automatically on the right side of your screen.

The invoice will not be re-sent unless you "Resend Notification" (see Chapter 13).

STEP #5 - Click "Exit"

Click "Exit" to return to ROI Results tab

STEP #6 - Verify your updates in the ROI Requests Tab

Ref	Action	Notes	Form	RequestID	Request Status	Request Date	Optional Reference	Requestor	Patient Name	Patient DOB	Invoice Number	Invoice/Comp Date	Invoice Amount	Billing Status
1	action		view	REQ20151012143026403 +	Logged	10/12/2015	test 123, test 456	ABT Vault	Burton, Chip	10/11/1952	IN20151012143026403 +	10/12/2015	\$0.00	Billable
2	action		view	REQ20150925115931956 +	Logged	9/25/2015	test 123	ABT Vault	Burton, Chip	10/11/1952	IN20150925115931956 +	9/25/2015	\$0.00	Non Billable
3	action		view	REQ20150925120558190 +	Logged	9/25/2015		ABT Vault	Burton, Chip	10/11/1952	IN20150925120558190 +	9/25/2015	\$0.00	Billable
4	action		view	REQ20150925120829238 +	Logged	9/25/2015		ABT Vault	Burton, Chip	10/11/1952	IN20150925120829238 +	9/25/2015	\$0.00	Disability-Non Billable
5	action		view	REQ20150925122348325 +	Logged	9/25/2015		ABT Vault	Burton, Chip	10/11/1952	IN20150925122348325 +	9/25/2015	\$0.00	Billable
6	action		view	REQ20150923111431900 +	Incomplete	9/23/2015		ABT Vault	Burton, Chip	10/11/1952	IN20150923111431900 +	9/23/2015	\$0.00	Billable

STEP #7 - Add a note giving the reason for your edit(s)

See Chapter 12: Adding a Note.

Ref	Action	Notes	Form	RequestID	Request Status
1	action		view	! REQ20150209140705622 +	Complete
2	action		view	! REQ20150130111831883 +	Notified
3	action		view	REQ20150127182540982 +	Logged
4	action		view	REQ20150123075148100 +	Logged

CHAPTER 12.0

ADDING A NOTE

Add an electronic “sticky note” regarding a Request anytime it seems wise and in any situation routinely required by your supervisor.

There is no limit to the number of notes you can add. You may add them at any point in the Request fulfillment process.

It is strongly advised that you add a note to explain and document the following important events:

- * editing an existing Request (including changing the Request Type, Billing Type, or Request Status)
- * reprocessing a request (marking it “complete” again)
- * posting a payment (entering the check #, noting if a payment was a walk-in or an over-the-phone payment, and any other pertinent details that will help verify and track payments)
- * learning something about a Request situation that could help other users (including technical support staff who must take calls from Requestors after you have finished processing a Request and retrace what has occurred)
- * anything else you deem notable or that your supervisor has instructed you to include.

STEP #1 - Click the pen icon in the “Notes” column

A Notes window will appear (see next step)

Ref	Action	Notes	Form	RequestID	Request Status
			view	REQ20150209140705622 +	Complete
2	action		view	REQ20150130111831883 +	Notified
3	action		view	REQ20150127182540982 +	Logged
4	action		view	REQ20150123075148100 +	Logged

STEP #2 - Type your note in the text box and review carefully for accuracy

STEP #3 - Click “Add Note.” Otherwise, it will NOT be saved.

https://www.abtroiplus.com/provider/entry/notes.asp?ID=785&NoteID=&JOBID=ROI_PLUS&INFO=IT

Note ID : IN20150123091634421

Enter the new note info below and click Add Note:

Incorrectly classified as non-billable, continuing care.
Changed to billable, legal and sent out invoice to Requestor.

Add Note Reset

[Click Here to Close Notes Window](#) Important: Before closing make sure to click the Add Note button if you are adding information to the note.

These Notes are informational only.

Click “Reset” as a shortcut to delete the text you have typed in the box so far.

Adding a Note - Continued

Notes: Once added, this note and any additional notes will be shown above the text box each time the Notes window is opened.


Each note will include time, date, user, and the note itself.

Notes cannot be deleted. They are viewed only by other system users, not by Requestors.

STEP #4 - Click "Click Here to Close Notes Window."

https://www.abtroipius.com/provider/entry/notes.asp

Note ID : **IN20150123091634421**

 **2/9/2015 8:33 pm EST**
 User ID: Angela Ford
 Incorrectly classified as non-billable, continuing care. Changed to billable, legal and sent out invoice to Requestor.




Enter the new note info below and click Add Note:

[Click Here to Close Notes Window](#) Important: Before closing make sure to click the Add Note button if you are adding information to the note.

These Notes are informational only.

STEP #5 - Refresh your screen.

You may refresh by clicking on another tab and returning to the ROI Results Tab. Once the first note for a Request has been saved in the system, the pen icon changes to a note icon.

	Action	Notes	Form	RequestID	Request Status
1	action		view	 REQ20150130111831883 +	Notified
2	action		view	REQ20150127182540982 +	Logged
3	action		view	REQ20150123075148100 +	Logged
4	action		view	REQ20150123091634421 +	Incomplete

CHAPTER 13.0

RESENDING A NOTIFICATION

You have the option to resend the **PHI Request Fulfillment Notification** to the Requestor when needed. You may send the invoice along with it. In fact, this feature is often used for the primary purpose of resending the invoice (rather than the Notification).

Here are some common reasons for choosing “Resend a Notification.”

- * The Requestor does not have it at-hand.
- * You or a coworker did not make sure that you used the fax number on the original Request document. Note: If you send to the wrong fax number, you have committed a potential breach.
- * You actually need to resend the invoice, so the Requestor can pay an outstanding item.
- * You need to give the Requestor the account log-in information for payment and/or viewing, but you do not want to commit a breach by handing out that information to an unauthorized, unknown individual over the phone, so you advise the Requestor that you will resend to the number authorized number on the original Request document.

STEP #1 - Search for the relevant Request in the ROI Requests tab

In the ROI Requests tab, you may click “Search” in the Query section to bring up a list of the most recent items. You can also search quickly by entering the Patient Last Name (“Begins With” search), the last few digits of the Invoice Number (“Ends With” search), or an Optional Reference (“Contains” search).

STEP #2 - Click the relevant Request ID

Ref	Action	Notes	Form	RequestID	Request Status	Request Date	Optional Reference	Requestor
1	action		view	! REQ20150418073228566 +	Notified	4/18/2015	ABT Vault	
2	action		view	! REQ20141002072630765 +	Notified	10/2/2014	IBX	
3	action		view	! REQ20140917100559756 +	Notified	9/17/2014	Spectrum Informati	

STEP #3 - Click “Resend Notification”

 [Return to results](#)

Status	Request ID	Request Date	Requestor	Patient	DOB	Total Pages / Included
Notified	REQ20140403102812319	4/3/2014	ABT Vault	Burton,Chip	10/11/1952	22 / 19

[Resend Notification](#)

ROI Documents related to this request:

Ref	Standard View	Quality Control	Total Pages / Included		Date/Time	Delete
			(All Pages)	(No Pages)		
1	<input type="checkbox"/> Request Item 1 (Process)	(QA Process) (All Pages) (No Pages)	7 / 4		4/3/2014 10:29:11 AM	
2	<input type="checkbox"/> Request Item 2 (Process)	(QA Process) (All Pages) (No Pages)	15 / 15		4/3/2014 10:29:11 AM	
<input type="checkbox"/> Select All		View Selected	PopUp Selected			

[Request is Complete](#)

[Exit to results](#)

STEP #4 - In the Re-Send Notification window. . . .

1. Verify that the fax number is correct. If it is incorrect, correct it here.
2. By default, the invoice is included with the Notification. If you do not want to resend the invoice, uncheck the box.

NOTE: This window is one way to determine whether the Request was sent to the correct fax #, even if you do not need to resend anything.

[Re-Send Notification](#)

REQ20140403102812319

To resend the notification for this request, click on the 'Send' button below

Notification being faxed to:

☒ Include Invoice with Notification









[Send](#) [Cancel](#)

STEP #5 - Click “Send” to refax the Notification (and invoice, if selected) to the fax listed in this box.

OR click “Cancel” if you do not wish to proceed.

STEP #6 - Verify that the fax is resending

Return to the ROI Requests tab to check the color of the Fax Status Indicator. The **yellow** exclamation point indicates that a fax is in progress.

Ref	Action	Notes	Form		RequestID	Request Status	Request Date	Requestor	Patient Name
1	action		view		REQ20140403102812319 +	Complete	4/3/2014	ABT Vault	Burton,Chip
2	action		view		REQ20140320121128409 +	Notified	3/20/2014	ABT Vault	Burton,Chip
3	action		view		REQ20140319121809841 +	Viewed	3/19/2014	ABT Vault	Burton,Chip
4	action		view		REQ20140312224517450 +	Viewed C	3/12/2014	ABT Vault	Burton,Chip

CHAPTER 14.0

REQUESTORS TAB

The **Requestors Tab** enables you to view, add, and edit Requestors and specific Requestor Contacts within the ROI+ Requestor database. You can also search for Requestors by name and/or account number.

For HIPAA compliance purposes, it is important to enter Requestor information accurately and to always include the specific contact information associated with a Request.

The Requestor database is shared across Providers, so you might find that a Requestor is already in the database, even though you did not enter it yourself. Also, because the database is shared, you must pay close attention to ensure that you double-check existing Requestor information for accuracy and ensure that you enter information accurately.

REQUESTORS TAB - SCHEMATIC

The screenshot shows the ROI+ web application interface. At the top, there is a navigation bar with links: Dashboard, Hide Query, Add New Requestor, Admin, and Logout. Below this is a tabbed interface with 'ROI Requests', 'Requestors' (selected), 'Patients', 'Payment', and 'Audit'. The 'Requestors' tab is active, showing 'P0000-0 ABT Health, Inc.' and a 'Requestor Quick Search - 3' section with a grid of letters A-Z and 'ALL'. Below the search grid are two search fields: 'Requestor: BEGINS WITH' and 'Account Number: BEGINS WITH'. There are also 'Results Per Page' (set to 10) and 'Sort Value' (set to Requestor) dropdowns. At the bottom, there are 'Search' and 'Clear' buttons, and radio buttons for 'asc' (selected) and 'desc' sorting. Numbered callouts 1 through 10 point to specific elements: 1. Requestors Tab, 2. Add New Requestor, 3. Requestor Quick Search, 4. Requestor Name Search, 5. Account Number Search, 6. Results Per Page, 7. Sort Value, 8. Search button, 9. Clear button, 10. Ascending/Descending radio buttons.

1. Requestors Tab - Click to go to the Requestors Tab.
2. Add New Requestor - Click to add a new Requestor to the database.
3. Requestor Quick Search - Search for a Requestor by clicking the first letter of the Requestor Name or click ALL to display all Requestors in the database.
4. Requestor Name Search - Search by entering the Requestor Name and click Search.
5. Account Number Search - Search by entering the Requestor Account Number and click Search.
6. Results Per Page - Specify how many results you would like to see per page (10, 20, or 30).
7. Sort Value - Specify how you would like the results to be sorted for viewing (by Requestor Name or by Account Number).
8. Search button - Click to execute your search.
9. Clear button - Click to clear the query fields and reset all items to their default settings.
10. Ascending/Descending radio buttons - Click "asc" to see results in ascending order (1, 2, 3 or A, B, C) or "desc" to see them in descending order (3, 2, 1 or Z, Y, X) for the Sort Value you've chosen.

ADD A NEW REQUESTOR

BEFORE YOU BEGIN! Search to make sure the Requestor is not already in the ROI+ database. Do *not* create a duplicate entry. You may find that you simply need to add another Requestor Contact to an existing Requestor database record.

If the Requestor is not in the database, you must add the Requestor, followed by the specific Requestor contact. Click the **“Add New Requestor”** link at the top of the Requestors Tab (see Schematic Item #2) to bring up the **Requestor Management** form.

Fill out the form as completely and accurately as possible. The Requestor cannot be deleted, but it can be edited.

Requestor Management

Requestor:	<input type="text"/>	
Address1:	<input type="text"/>	
Address2:	<input type="text"/>	
City:	<input type="text"/>	
State:	<input type="text"/>	
Zip:	<input type="text"/>	
Country:	<input type="text"/>	
Phone:	<input type="text"/>	(nnn) nnn-nnnn
Fax:	<input type="text"/>	(nnn) nnn-nnnn
Email:	<input type="text"/>	name@domain.com

Note: Specific requestor contacts can be added once the new requestor is established

Click to save this Requestor to the Requestor database.

Click to return to the previous screen without saving any information.

Once the general Requestor information is in the database, you will need to add a specific Requestor contact.

Use the formats shown in gray for phone, fax, and e-mail.

SEARCH FOR A REQUESTOR

After typing the Requestor Name or Account Number, setting your search preferences (results per page, sort value, and ascending/descending), and clicking Search, your results will appear.

ROI+

Dashboard

Hide Query

Add New Requestor

Admin

Logout

ROI Requests

Requestors

Patients

Payment

Audit

P0000-0 ABT Health, Inc.

Requestor Quick Search - 3

ALL A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Requestor:

BEGINS WITH

abt

Account Number:

BEGINS WITH

Results Per Page:

10

Sort Value:

Requestor

Search

Clear

asc

desc

Documents Found: 1

Results sorted by: Requestor

1

Click on the Link below to view the document.

Ref	Requestor	Account Number
1	ABT Vault	R10068

Sample search entry


If you do a "Begins With" search on Account Number, remember to type the letter "R" at the beginning of the account #.

Sample results list

MANAGE YOUR SEARCH RESULTS

You have three ways to manage your Requestor search results, as shown below.

Click on the Link below to view the document.

Ref	Requestor	Account Number
1	 ABT Vault	R10068

EDIT REQUESTOR INFORMATION by clicking the line number in the Ref column.

VIEW/EDIT REQUESTOR CONTACTS by clicking the drill-down arrow.

VIEW REQUESTOR DETAIL by clicking the Requestor Name.

EDIT AN EXISTING REQUESTOR

In your search results list, locate the relevant Requestor. Click the appropriate line number in the Ref column for that Requestor.

EDIT REQUESTOR INFORMATION by clicking the line number in the Ref column.

Click on the Link below to view the document.

Ref	Requestor	Account Number
1	ABT Vault	R10068

The **Requestor Management** form will be displayed for the existing Requestor.

Use this side of the screen to update Requestor information in each field below, as needed.

Requestor Management		Requestor Detail Information	
Account Number:	R10068	Account Number:	R10068
Requestor:	ABT Vault	Requestor:	ABT Vault
Address1:	3305 Altura Court	Address1:	3305 Altura Court
Address2:		Address2:	
City:	Bryan	City:	Bryan
State:	TX	State:	TX
Zip:	77802	Zip:	77802
Country:	US	Country:	US
Phone:	(979) 776-3540	Phone:	(979) 776-3540
Fax:	(810) 963-6833	Fax:	(810) 963-6833
Email:	smanske@abtvault.com	Email:	smanske@abtvault.com
		Last Updated:	11/12/2014 8:18:47 PM
<input type="button" value="Update Current Requestor"/> <input type="button" value="Cancel"/>			

Click to save your updates to the Requestor database.

Click to return to the previous screen without saving any changes.


Use the formats shown in gray for phone, fax, and e-mail.

This side of the screen shows the current Requestor Detail.

VIEW REQUESTOR DETAIL

In your search results list, locate the relevant Requestor. Click the Requestor Name in the Requestor column.

Click on the Link below to view the document.

Ref	Requestor	Account Number
1	 ABT Vault	R10068

**VIEW REQUESTOR
DETAIL** by clicking the
Requestor Name.

The **Requestor Detail Information** will be displayed. You cannot edit the information here, but you can view it.

Sample Requestor Detail Information Screen

Requestor Detail Information

Account Number: R10068

Requestor: ABT Vault

Address1: 3305 Altura Court

Address2:

City: Bryan

State: TX

Zip: 77802

Country: US

Phone: (979) 776-3540

Fax: (810) 963-6833

Email: smanske@abtvault.com

Last Updated: 11/12/2014 8:18:47 PM

VIEW/EDIT AN EXISTING REQUESTOR CONTACT

In your search results list, locate the relevant Requestor. Click the drill-down arrow for that Requestor to see a list of all contacts associated with the Requestor.


Click on the Link below to view the document.

Ref	Requestor	Account Number
1	ABT Vault	R10068

VIEW/EDIT REQUESTOR CONTACTS by clicking the drill-down arrow.

If your Contact is in the list, check to ensure that the Contact's information matches the information in your original written Request document.

Return to your Requestor search results by clicking this arrow.

 [return to requestors list](#)

Account Number	Requestor	Address	Phone	PIN
R10068	ABT Vault	3305 Altura Court Bryan ,TX 77802	(979) 776-3540	5445

Contacts belonging to this requestor:

[Add New Contact](#)

Ref	Name	Phone	Email
1	Chip Burton	(832) 541-5155	cburton@abtvault.com
2	Chris Regan	(979) 776-3540	smanske@abtvault.com
3	Don test33	(979) 776-3540	smanske@abtvault.com
4	Don White	(619) 656-1422	dw hite@abtvault.com
5	Janet Eimers	(979) 690-9038 x 501	smanske@abtvault.com
6	Kenneth Kopald	(704) 256-9712	kkopald@abtvault.com
7	Manske,Stephen C	(979) 776-3540	smanske@abtvault.com
8	Michael Million	(979) 776-3540	smanske@abtvault.com
	test		

Basic Requestor information is summarized here, including the Account Number and PIN.

Click the line number in the Ref column to **edit** an existing contact (shown below).

Click the name of an existing contact to **view** the complete detail for a contact.

To **view and verify** the complete detail for a Requestor Contact, click the Contact's name in the Contacts list. The Requestor Contact Detail Information screen will display.

Sample Requestor Contact Detail Information Screen

Requestor Contact Detail Information

Account Number: R10068

Requestor: ABT Vault

Contact Name: Chip Burton

Address1: 3111 ashlock

Address2:

City: Any

State: TX

Zip: 77802

Country: US

Phone: (832) 541-5155

Fax: (810) 963-6833

Email: cburton@abtvault.com

Last Updated: 11/12/2014 8:19:26 PM

To **edit** the information for a Requestor Contact, click the line number next to the Contact's name in the Contacts list. The Requestor Contact Management Screen will display.

Use this side of the screen to update Requestor Contact information in the fields below.

Sample Requestor Contact Management Screen

Requestor Contact Management

Account Number:

Requestor:

Contact Name:

Address1:

Address2:

City:

State:

Zip:

Country:

Phone: (nnn) nnn-nnnn

Fax: (nnn) nnn-nnnn

Email: name@domain.com

Requestor Contact Detail Information

Account Number: R10068

Requestor: ABT Vault

Contact Name: Chip Burton

Address1: 3111 ashlock

Address2:

City: Any

State: TX

Zip: 77802

Country: US

Phone: (832) 541-5155

Fax: (810) 963-6833

Email: cburton@abtvault.com

Last Updated: 11/12/2014 8:19:26 PM

Use the formats shown in gray for phone, fax, and e-mail.

This side of the screen shows the current Requestor Contact Detail.

Click to save your updates to the Requestor database.


Click to return to the previous screen without saving any changes.

Click to clear ALL fields completely.

ADD A NEW REQUESTOR CONTACT

If the Contact specified in your original written Request document is not in the list, you must add the new Contact.

Return to your Requestor search results by clicking this arrow.

 [return to requestors list](#)

Account Number	Requestor	Address	Phone	PIN
R10068	ABT Vault	3305 Altura Court Bryan ,TX 77802	(979) 776-3540	5445

Contacts belonging to this requestor:

Ref	Name	Phone	Email	Add New Contact
1	Chip Burton	(832) 541-5155	cburton@abtvault.com	
2	Chris Regan	(979) 776-3540	smanske@abtvault.com	
3	Don test33	(979) 776-3540	smanske@abtvault.com	
4	Don White	(619) 656-1422	dw hite@abtvault.com	
5	Janet Eimers	(979) 690-9038 x 501	smanske@abtvault.com	
6	Kenneth Kopald	(704) 256-9712	kkopald@abtvault.com	
7	Manske, Stephen C	(979) 776-3540	smanske@abtvault.com	
8	Michael Million	(979) 776-3540	smanske@abtvault.com	
9	test			

Click here to to add a new Contact.

When you click to add a new Contact, the Requestor Contact Management Screen displays. You will type the Contact Name from the original written Request document. Then, you will check the remaining details against the original written Request document for accuracy. The address, phone, fax, and e-mail have been completed automatically, using the main Requestor information details. Edit these fields as needed for your specific Contact.

Sample Requestor Contact Management Screen

Requestor Contact Management

Account Number:

Requestor:

Contact Name:

Address1:

Address2:

City:

State:

Zip:

Country:

Phone: (nnn) nnn-nnnn

Fax: (nnn) nnn-nnnn

Email: name@domain.com

Click to save this Contact to the Requestor database.

Click to return to the previous screen without saving any changes.

Click to clear ALL fields completely.

Type the Contact Name here.

Edit the remaining fields as needed.

Use the formats shown in gray for phone, fax, and e-mail.

CHAPTER 15.0

PATIENTS TAB

The **Patients Tab** enables you to view, add, and edit Patients within the ROI+ Patient database. You can also search for Patients by Name, Date of Birth (DOB), MRN, and Patient ID.

PATIENTS TAB - SCHEMATIC

The screenshot shows the ROI+ Patients Tab interface. At the top, there is a navigation bar with links: Dashboard, Hide Query, Add New Patient, Admin, and Logout. Below this is a sub-navigation bar with links: ROI Requests, Requestors, Patients (highlighted), Payment, and Audit. The main header area displays 'P0000-0 ABT Health, Inc.' and 'Patient Quick Search - 3'. Below the header is a search bar with a dropdown menu showing 'ALL' and a row of letters A through Z. The search bar contains four input fields: Patient Name, Patient DOB, MRN, and Patient ID. Each field has a dropdown menu with 'BEGINS WITH' and 'EQUALS' options. The Patient Name field has a calendar icon. The Patient DOB field has a calendar icon. The MRN and Patient ID fields have checkboxes. Below the search bar is a 'Results Per Page' dropdown set to '10' and a 'Sort Value' dropdown set to 'Patient Name'. There are 'Search' and 'Clear' buttons. At the bottom, there are radio buttons for 'asc' and 'desc' sorting. Numbered callouts 1 through 12 point to various elements: 1. Patients Tab link, 2. Add New Patient link, 3. Patient Quick Search - 3, 4. Patient Name search field, 5. MRN search field, 6. Patient DOB search field, 7. Patient ID search field, 8. Results Per Page dropdown, 9. Sort Value dropdown, 10. Search button, 11. Clear button, 12. asc/desc radio buttons.

1. Patients Tab - Click to go to the Patients Tab.
2. Add New Patient - Click to add a new Patient to the database.
3. Patient Quick Search - Search for a Patient by clicking the first letter of the Patient's Last Name or click ALL to display all Patients in the database.
4. Patient Name Search - Search by entering the Patient Name and clicking Search.
5. MRN Search - Search by entering the Patient MRN and clicking Search.
6. Patient DOB Search - Using the calendar feature, search by entering the Patient DOB or DOB range and clicking Search.
7. Patient ID Search - Search by entering the Patient ID and clicking Search.
8. Results Per Page - Specify how many results you would like to see per page (10, 20, or 30).
9. Sort Value - Specify how you would like the results to be sorted for viewing (by Patient Name, MRN, Patient DOB, or Patient ID).
10. Search button - Click to execute your search.
11. Clear button - Click to clear the query fields and reset all items to their default settings.
12. Ascending/Descending radio buttons - Click "asc" to see results in ascending order (1, 2, 3 or A, B, C) or "desc" to see them in descending order (3, 2, 1 or Z, Y, X) for the Sort Value you've chosen.

ADD A NEW PATIENT

BEFORE YOU BEGIN! Search to make sure the Patient is not already in the ROI+ database. Do *not* create a duplicate entry.

If the Patient is not in the database, click the “**Add New Patient**” link at the top of the Patients Tab (see Schematic Item #2) to bring up the **Patient Management** form.

Fill out the Patient Management form carefully and accurately. Once added to the database, a new Patient record cannot be deleted, but it can be edited.

Patient Management

Last Name:	<input type="text"/>	*	<div style="border: 1px solid black; border-radius: 10px; background-color: #FFFF00; padding: 5px; width: fit-content;"> The fields with a red asterisk (*) MUST be completed. </div>
First Name:	<input type="text"/>	*	
Middle Name:	<input type="text"/>		
Date of Birth:	<input type="text"/>	* mm/dd/yyyy	
MRN:	<input type="text"/>		
Patient ID:	<input type="text"/>		
Gender:	<input checked="" type="radio"/> Male <input type="radio"/> Female		
Address1:	<input type="text"/>		
Address2:	<input type="text"/>		
City:	<input type="text"/>		
State:	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">ALABAMA ▼</div>		
Zip:	<input type="text"/>	nnnnn-nnnn	<div style="border: 1px solid black; border-radius: 10px; background-color: #FFFF00; padding: 5px; width: fit-content;"> Use the formats shown in gray for date of birth, zip, phone, fax, and e-mail. </div>
Country:	<input type="text"/>		
Home Phone:	<input type="text"/>	(nnn) nnn-nnnn	
Mobile Phone:	<input type="text"/>	(nnn) nnn-nnnn	
Fax:	<input type="text"/>	(nnn) nnn-nnnn	
Email:	<input type="text"/>	name@domain.com	

Add New Patient

Cancel

Clear

Click to save this Patient to the Patient database.

Click to return to the previous screen without saving any information.

Click to clear ALL information you have typed.

SEARCH FOR A PATIENT

After entering the information you would like to use for your search, setting your search preferences (results per page, sort value, and ascending/descending), and clicking Search, your results will appear.

Dashboard Hide Query Add New Patient Admin Logout

ROI Requests Requestors Patients Payment Audit

P0000-0 ABT Health, Inc.

Patient Quick Search - 3

ALL A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Patient Name: BEGINS WITH burton,chip MRN: BEGINS WITH

Patient DOB: EQUALS Patient ID: BEGINS WITH

Results Per Page: 10 Sort Value: Patient Name Search Clear asc desc

Documents Found: 2 Results sorted by: Patient Name

1

Click on the Link below to view the document.

Ref	Patient Name	MRN	Patient DOB	Patient ID
1	Burton,Chip +	111111	10/11/1952	
2	Burton,Chip +	333333333	10/11/1952	222222

MANAGE YOUR SEARCH RESULTS

You have three ways to manage your Patient search results, as shown below.

EDIT PATIENT INFORMATION by clicking the line number in the Ref column.

Ref	Patient Name	MRN	Patient DOB	Patient ID
1	Burton,Chip +	111111	10/11/1952	
2	Burton,Chip +	333333333	10/11/1952	222222

VIEW PATIENT RECORDS if your Provider stores Patient records in the **ABT MedXpress repository**.
For most users, this option is not applicable.

VIEW PATIENT DETAIL by clicking the Patient Name.

EDIT AN EXISTING PATIENT

In your search results list, locate the relevant Patient. Click the appropriate line number in the Ref column for that Patient.

EDIT PATIENT INFORMATION by clicking the line number in the Ref column.

Ref	Patient Name	MRN	Patient DOB	Patient ID
1	Burton, Chip +	111111	10/11/1952	
2	Burton, Chip +	333333333	10/11/1952	222222

The **Patient Management** form will be displayed for the existing Patient.

Use this side of the screen to update Patient information in each field below, as needed.

Each field with a red asterisk (*) MUST be completed.

Patient Management

Last Name: *

First Name: *

Middle Name:

Date of Birth: * mm/dd/yyyy

MRN:

Patient ID:

Gender: ☒ Male ☐ Female

Address1:

Address2:

City:

State:

Zip: nnnnn-nnnn

Country:

Home Phone: (nnn) nnn-nnnn

Mobile Phone: (nnn) nnn-nnnn

Fax: (nnn) nnn-nnnn

Email:

Patient Detail Information

MRN: 111111

Patient: Burton, Chip

PatientID:

Date of Birth: 10/11/1952

Gender: M

Address1:

Address2:

City:

State: TX

Zip:

Country:

Home Phone:

Mobile Phone:

Fax:

Email:

Last Updated: 3/8/2013 9:57:17 AM

This side of the screen shows the current Patient Detail.

Update Current Patient

Cancel

Clear

Click to save your updates to the Patient database.



Click to return to the previous screen without saving any changes.

Click to clear ALL information you have typed.

Use the formats shown in gray for date of birth, zip, phone, fax, and e-mail.

VIEW PATIENT DETAIL

In your search results list, locate the relevant Patient. Click that Patient Name in the Patient Name column.

Ref	Patient Name	MRN	Patient DOB	Patient ID
1	 Burton, Chip +	111111	10/11/1952	
2	 Burton, Chip +	333333333	10/11/1952	222222

VIEW PATIENT DETAIL by clicking the Patient Name.

The **Patient Detail Information** will be displayed. You cannot edit the information here, but you can view it.

Sample Patient Detail Information Screen

Patient Detail Information

MRN: 111111

Patient: Burton, Chip

PatientID:

Date of Birth: 10/11/1952

Gender: M

Address1:

Address2:

City:

State: TX

Zip:

Country:

Home Phone: (555) 555-5555

Mobile Phone:

Fax: (555) 555-5555



Email: cburton@email.com

Last Updated: 3/9/2015 5:42:08 PM

VIEW PATIENT RECORDS

NOTE: The only Patient records that can be viewed from the Patients Tab are those stored in the **ABT MedXpress repository**. Because most Providers store their records elsewhere, this feature is likely not relevant to you.

In your search results list, locate the relevant Patient. Click the drill-down arrow for that Patient to see all Patient records from the **ABT MedXpress repository** associated with that Patient.


Ref	Patient Name	MRN	Patient DOB	Patient ID
1	 Burton, Chip +	111111	10/11/1952	
2	 Burton, Chip +	333333333	10/11/1952	222222

VIEW PATIENT RECORDS
if your Provider stores
Patient records in the **ABT
MedXpress repository**.

*For most users, this option
is not applicable.*

If any Patient records are stored in the **ABT MedXpress repository**, they will be displayed here. However, your Provider most likely stores Patient records elsewhere, so you will receive the message “No Patient Records Found” (see below).

Return to your
Patient search
results by clicking
this arrow.

 [return to results](#)

Name	MRN	Patient ID	DOB
Burton, Chip	111111		10/11/1952

Basic Patient
information is
summarized
here, including
DOB, MRN, and
Patient ID.

[Patient Records related to this Patient:](#)

No Patient Records Found

If any records were stored in the **ABT MedXpress repository** for this Patient, they would be listed here. Otherwise, you will see the message “No Patient Records Found,” meaning that there are no records in the repository. However, Patient records might exist in another location, so you will need to check the location(s) where your Provider stores Patient records.