

# OP Practice Portal: Configure Medical Record Requests

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## About

Practice Portal users with Patient Interface permission Medical Record Request can enable the **Allow Medical Record Request** feature so that parents/guardians can request Medical Records from the My Chart > Summary section of the Patient Portal.

The below sections will walk you through how to complete the setup for this feature and show you what the parent/guardian will see in the Patient Portal.

## Add Medical Records and Delivery Methods

The settings below determine the options available to parents/guardians requesting Medical Records from the Patient Portal.

### Medical Records for Request

1. In the Practice Portal, navigate to the Document Management tab of Patient Interface: **Portal Management > Patient Interface > Document Management tab.**
2. Scroll down to the **Request Medical Records** section of the window.
3. Complete the **Medical Records for Request** section of the window:
  - a. Click the **Add Medical Record** button, and enter the name of the record in the **Medical Record** field.
  - b. *(Optional)* Click the **Spanish** tab, and enter the Spanish translation of the Medical Record you entered. This will be displayed when a parent/guardian is viewing their Patient Portal in Spanish.
  - c. *(Optional)* Repeat the above steps to enter additional Medical Records for Request.
  - d. *(Optional)* Use the **Up** and **Down** Action arrows to reorder the list, as needed. The list displayed in the Practice Portal is in the same order as what will be displayed to parents/guardians in the Patient Portal. If a Medical Record option needs to be removed from the list, click the **X**.
  - e. Click the **Save** button in the Medical Records Request section of the window.

### Medical Records for Request

Options available for request in the Patient Portal

English **Spanish**

	MEDICAL RECORD	ACTIONS
1	<input type="text" value="Immunization Record"/>	<input type="button" value="↑"/> <input type="button" value="↓"/> <input type="button" value="X"/>
2	<input type="text" value="Test Results"/>	<input type="button" value="↑"/> <input type="button" value="↓"/> <input type="button" value="X"/>

### Medical Records Delivery Method

1. Complete the **Medical Records Delivery Method** section of the window:

- a. Click the **Add Delivery Method** button, and enter how the parent/guardian can choose to receive the requested record(s) in the Delivery Method field.
- b. In the Note field, enter a note that will be presented to the parent/guardian when they select the method.
- c. *(Optional)* Click the **Spanish** tab, and enter the Spanish translation of the Delivery Method and Note that you entered. This will be displayed when a parent/guardian is viewing the Patient Portal in Spanish.
- d. Repeat the above steps to enter additional Medical Records Delivery Methods.
- e. *(Optional)* Use the **Up** and **Down** Action arrows to reorder the list. The list displayed in the Practice Portal is in the same order as what will be displayed to parents/guardians in the Patient Portal. If a Delivery Method option needs to be removed from the list, click the **X**.
- f. Click the **Save** button in the Medical Records Request section of the window.

**Medical Records Delivery Method**  
Options in which the requested medical records can be delivered to the patient. Notes entered here will be presented to the patient for more guidance or to request information for the delivery method

English Spanish

	DELIVERY METHOD	NOTE	ACTIONS
1	<input type="text" value="Pick up a paper copy"/>	<input type="text" value="The Practice will contact you when your records are ready."/>	↑ ↓ ×
2	<input type="text" value="Send to my Patient Portal account"/>	<input type="text" value="You'll receive your requested records as a new Message in the Patient Portal."/>	↑ ↓ ×
3	<input type="text" value="Send to an outside party"/> <span style="float: right; color: green;">G</span>	<input type="text" value="Please add additional info below. We may contact you if further details are needed."/> <span style="float: right; color: green;">G</span>	↑ ↓ ×

With the examples in the above images, this is what the parent/guardian will see in the Patient Portal when they are completing a request for Medical Records (once the feature is enabled):

**What records would you like to request?**  
Choose all that apply

Immunization Record

Test Results

**How would you like these records delivered?**  
Choose one option

Pick Up A Paper Copy

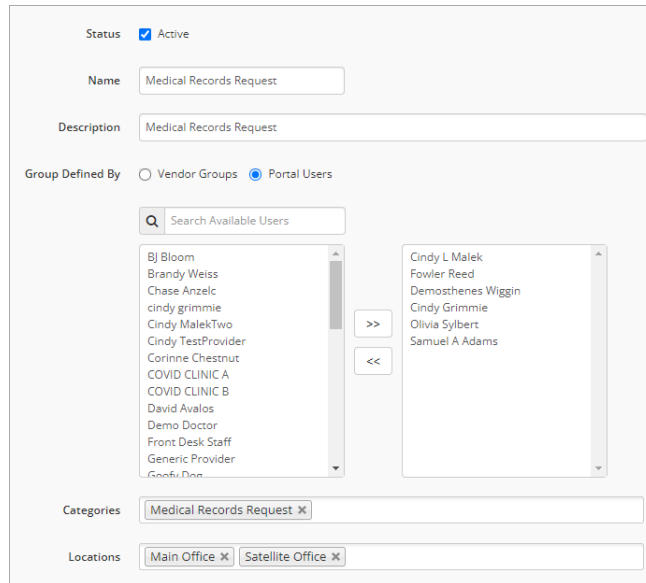
Send To My Patient Portal Account

Send To An Outside Party

Additional Information

## Message Group Setup

Messages for Medical Record Requests are driven by a Message Group created in the Practice Portal (**User Administration > Message Groups**). This Message Group **must** be created with the category of **Medical Records Request** and have the users who should receive these messages assigned. For more information on creating a Message Group, click [here](#).



Status  Active

Name: Medical Records Request

Description: Medical Records Request

Group Defined By:  Vendor Groups  Portal Users

Search Available Users

Users in left list: BJ Bloom, Brandy Weiss, Chase Anzelc, cindy grimmie, Cindy MalekTwo, Cindy TestProvider, Corinne Chestnut, COVID CLINIC A, COVID CLINIC B, David Avalos, Demo Doctor, Front Desk Staff, Generic Provider, Goshu.Doe

Users in right list: Cindy L Malek, Fowler Reed, Demosthenes Wiggin, Cindy Grimmie, Olivia Sylbert, Samuel A Adams

Categories: Medical Records Request X

Locations: Main Office X, Satellite Office X

## Review Page Templates For Medical Requests

Included with the Medical Records Request feature are new Page Templates that should be reviewed and customized to fit your Practice's workflow. Below are the new System Templates their descriptions. To learn how to copy and customize these templates, follow the steps found [here](#).

- **Portal Management > Patient Interface > Page Templates > Disclaimers > Medical Record Disclaimer:** Displayed at the top of the Medical Records Request page.
- **Portal Management > Patient Interface > Page Templates > Confirmations > Medical Record Request Confirmation:** Displayed after the parent/guardian clicks the Submit button to send their request to the Practice.
- **Portal Management > Patient Interface > Page Templates > Requests > Medical Records > Medical Record Request:** The contents of the message received by OP users assigned to the Message Group.

## Turn on the Request Medical Records Feature

Once you've completed all of the above setup, you're ready to enable the Medical Record Request feature!

1. Navigate to Portal Features: **Portal Management > Patient Interface > Manage Setup tab.**
2. Set the toggle for **Allow Medical Record Request** to the **ON** position.
3. Scroll to the bottom of the page, and click **Save**.

## Demo Video: How a Parent Will Request Medical Records from the Patient Portal

Your browser does not support HTML5 video.