

InteliChart Practice Portal: Configure Medical Record Requests

Last Modified on 10/17/2024 4:47 pm EDT

The content in this article is relevant to the InteliChart Patient Portal.

For documentation on the OP Portal, please [click here](#).

About

InteliChart 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 InteliChart 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 InteliChart Patient Portal.

Table of Contents:

- [The content in this article is relevant to the InteliChart Patient Portal.](#)
- [Add Medical Records and Delivery Methods](#)
 - [Medical Records for Request](#)
 - [Medical Records Delivery Method](#)
- [Message Group Setup](#)
- [Review Page Templates For Medical Requests](#)
- [Turn on the Request Medical Records Feature](#)
- [Demo Video: How a Parent Will Request Medical Records from the Patient Portal](#)

Add Medical Records and Delivery Methods

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

Medical Records for Request

1. In the InteliChart 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	Immunization Record	<div> <div>↑</div> <div>↓</div> <div>×</div> </div>
2	Test Results	<div> <div>↑</div> <div>↓</div> <div>×</div> </div>

Add Medical Record

Save

Medical Records Delivery Method

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

- 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.
- In the Note field, enter a note that will be presented to the parent/guardian when they select the method.
- (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.
- Repeat the above steps to enter additional Medical Records Delivery Methods.
- (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**.
- 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	Pick up a paper copy	The Practice will contact you when your records are ready.	<div> <div>↑</div> <div>↓</div> <div>×</div> </div>
2	Send to my Patient Portal account	You'll receive your requested records as a new Message in the Patient Portal.	<div> <div>↑</div> <div>↓</div> <div>×</div> </div>
3	Send to an outside party	Please add additional info below. We may contact you if further details are needed.	<div> <div>↑</div> <div>↓</div> <div>×</div> </div>

Add Delivery Method

Save

With the examples in the above images, this is what the parent/guardian will see in the IntelliChart 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

Description

Group Defined By ☐ Vendor Groups ☒ Portal Users

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

Goofy.Don

>>

<<

Cindy L Malek

Fowler Reed

Demosthenes Wiggin

Cindy Grimmie

Olivia Sylbert

Samuel A Adams

Categories

Locations

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.