medchart

Digital Desk Guide

Your guide to Medchart best practices

v.1.0

Have a question? Need a hand? Feel free to reach out to our support team through any one of these channels:

We have agents available via live chat from 9am to 5pm EST, Monday through Friday. If you write in after business hours, we will get back to you the next business day morning.

Email us anytime at contact@medchart.ca or reach out to your Customer Experience Associate.

Reach our support line at 1-888-399-7789.

Click on any of these topics for a step-by-step guide

Admin Functions

Add Credits/Funds to your Account
Set an Invoice Auto-Approval Limit
Download Monthly Invoices

Authorizations

Request your Client's E-Signature
Upload Signed Authorization Forms
Download Blank Authorization Forms

Clients

Register a Client
Edit a Client's Information

Requests

Request Records from a Healthcare Provider
Request an OHIP Summary
Request Records from Sick Kids
Checkout a Request in Action Items
Review the Tracking History of a Request

Invoices

Approve a Provider Invoice
Dispute a Provider Invoice
What if you Receive Invoices/Records from a Provider

Records

Download Clinical Notes and Records
Download Diagnostic Imaging
How to Share Records

Learn how to submit a proper authorization scan

Company Logo

Authorization and Direction

This is to authorize you to furnish Law Firm Demo Account, in the care of MedChart Inc., with all documentation which they may request from you from time to time regarding information in my file comprising the medical record, including but not limited to consultation reports, medical opinions, hospital admissions, progress reports, discharge reports, handwritten clinical notes and records, nurses' notes, X-ray results, MRI results, CT Scan results, reports of diagnostic tests, ambulance reports, etc. for the purposes of personal record keeping and/or to allow me to rapidly access consolidated medical records.

I have voluntarily enrolled to receive the services offered by MedChart and I consent to communication between myself and/or MedChart and/or Law Firm Demo Account and/or the provider regarding matters related to this request. I have read MedChart's privacy policy, available at https://www.medchart.ca/privacy. I have read MedChart's Terms and Conditions, available at https://www.medchart.ca/portal-tou. I acknowledge it contains information regarding the risks of email communication. I hereby consent to the use of email communication between MedChart and/or Law Firm Demo Account and/or the provider and/or myself to fulfill this request.

I am aware of the risks and benefits of consenting or refusing to provide consent and that I can withdraw consent in writing at any time by mail, fax or email to Medchart or through my online account at medchart.ca

I CONSENT TO DISCLOSURE OF THE PATIENT'S PERSONAL HEALTH INFORMATION TO:

c/o MedChart Inc
503 - 460 Richmond Street West,
Toronto, ON, M5V 1Y1

FAX to: 1-888-720-2212
Phone: 1-888-399-7789
EMAIL to: records@medchart.ca

SIGNATURE OF PATIENT OR SUBSTITUTE DECISION MAKER (SDM):

Witness Signature

x Signature
Signature of Patient/SDM

Witness Name

Name of Patient/SDM

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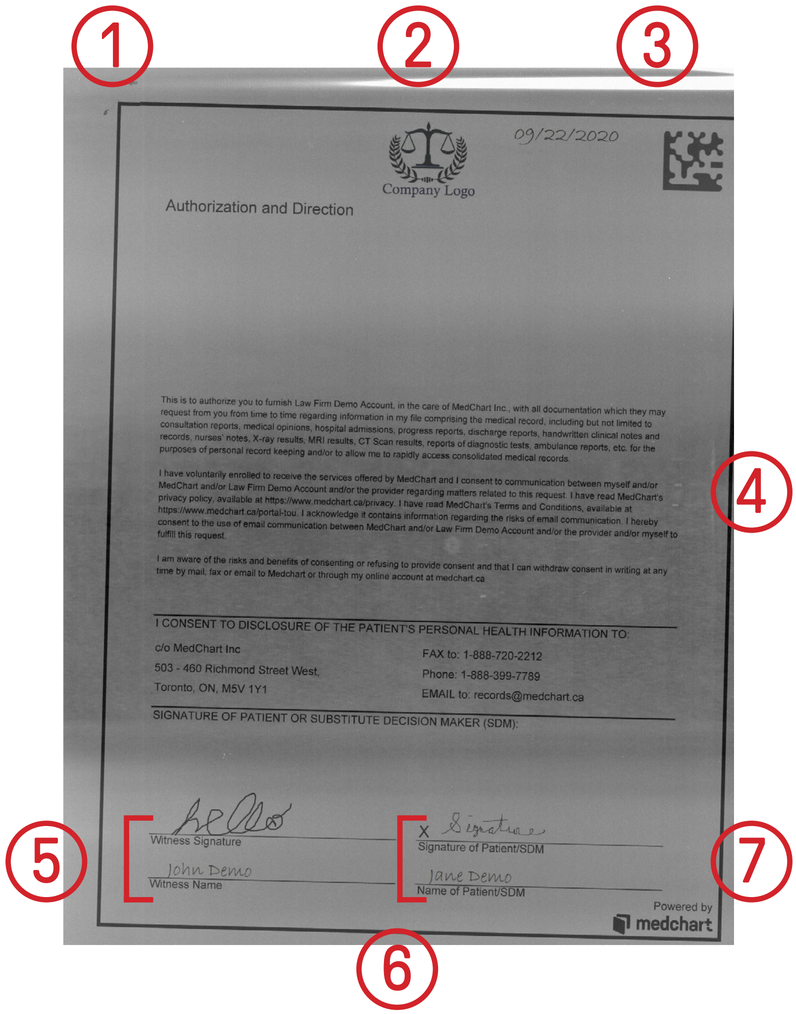
1. Borders intact and aligned correctly
2. Clear, intact barcode
3. Clear, visible scan
4. No additional markups/updates
5. Witness section is blank
6. Only the client's signature is filled out

_consents & authorizations

Our system automatically rejects consents that have these common errors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09/22/2020

Company Logo

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Phone: 1-888-399-7789
EMAIL to: records@medchart.ca

SIGNATURE OF PATIENT OR SUBSTITUTE DECISION MAKER (SDM):

Witness Signature
John Demo
Witness Name

X Signature
Signature of Patient/SDM
Jane Demo
Name of Patient/SDM

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1. Staple mark in corner
2. Dated
3. Distorted barcode
4. Dark scan
5. Witness section filled out
6. Client name filled out
7. Crooked scan, with borders cut off

action items

- Check your action items often
- Pay/dispute your invoices quickly so there is no delay in obtaining records
- Follow the instructions for any actions required

common actions

You may see these buttons beside requests you have in Action Items. Review what each one means below:

Witness	Your request is ready to be submitted, all you have to do is witness and submit!
Pay	You have an invoice that needs to be paid. Review the invoice and click pay. We will handle the rest!
Missing Documents	We need government issued Photo ID of your client to process the request. Please upload a copy to the client's profile and then submit!
Consent Required	We need a signed consent from your client. You may have to re-send the esignature request or review your scanned consent if it was rejected.
Review Client	Information on your client's profile is incorrect. Please review the date of birth, healthcard number, address, and phone number and rectify any issues.
Upload SDM	We are missing valid court-issued Substitute Decision Maker documents. If this is for a child, make sure you are using the long form birth certificate that lists the parents' names.

Each request has its own unique tracker, that you can access from the Request Details page. Below, we will break down the various information you can gather from the tracker:

2020-10-01	Request submitted to MedChart by Demo Clerk	

This logs the date you submitted the request.

2020-10-01	Request & Authorization to 460 Richmond St West Suite 503 Toronto ON. Contents: Cover Letter, Consent	

This logs the date we sent the request & authorization to the provider. If you see a paperclip icon, that means you can download a PDF copy of what we sent.

2020-10-15	Sent Mail to Provider Printed: Cover Letter, Consent, Attachment, Transaction(s): #00000-Stub #123456	

This logs the date we sent payment for an invoice you approved, along with a copy of the invoice and cheque stub.

2020-10-15	Payment of $120.00 sent to Health Information Custodian	

This log is for a payment.

2020-10-20	Fax sent to 16475555555	

This log is for a follow-up fax.

2020-10-22	Reminder to 16475555555	

This log is for an automated written reminder/follow-up.

2020-10-25	Placed call to provider. Message: They received the request and are fulfilling it today	

This log is for a phone call follow-up.