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**How to Request Physician Record**

**Step 1: Open Chart swap and Login**

* <https://www.chartswap.com/>
  + Username: [records.habtemariamlaw@gmail.com](mailto:records.habtemariamlaw@gmail.com)
  + Password: Rainmaker@11

**Step 2: Find the Provider for the hospital**

* Type in the name of the hospital or provider (if you have it already) in create new request

Graphical user interface

Description automatically generated

* Select the state client was treated and Emergency Medicine for Specialty

Graphical user interface

Description automatically generated with medium confidence

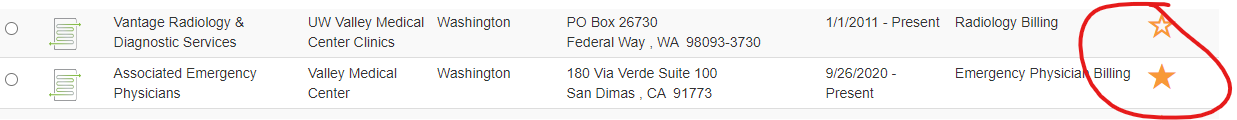
* Select the option with the dates that shows the start date - present and the Emergency physician Billing Record types

Graphical user interface, text, application

Description automatically generated

* If you have multiple option, select the provider with the colored star, that has this logo Icon

  Description automatically generated, and that also has both provider and attention information



* If you have no option contact hospital for provider name (sometimes the provider does not put the hospital name due to servicing multiple hospitals so they use the provider name at the attention)

A picture containing text

Description automatically generated

* Once you have found the correct provider you will select new request on the right side (if you don’t see that option, you have not selected the provider like soGraphical user interface

  Description automatically generated

Graphical user interface, text, application, chat or text message

Description automatically generated

**Step 3: Open Sejda and Login**

- Open Sejda and login

- <https://www.sejda.com/login>

-Login (only attempt to login once if login does not work contact your intake supervisor)

Username: [nefmariam@gmail.com](mailto:nefmariam@gmail.com)

Password: rainmaker

**Step 4: Download the client HIPPA form from Filevine if it has not been saved to your desktop yet.**

* HIPPA form will be filed in the docs tab in folder 1. Correspondence
  + If Correspondence folder is empty look for a file with no title and the HIPPA form will be in that file

Step 1: A picture containing timeline

Description automatically generated

Step 2A:

Step 2B: A picture containing text

Description automatically generated

* Once HIPPA form is located click the form once

Graphical user interface

Description automatically generated with medium confidence

* select download
  + This will be located at the top right corner in Filevine:

Shape, arrow

Description automatically generated

* Once downloaded save to desktop in clients folder

**Step 5: Go back to Sejda and Edit the HIPPA form**

* Select the green logo on the left

Graphical user interface, text, application, chat or text message

Description automatically generated

* Select Edit PDF document

Graphical user interface, website

Description automatically generated

* Select upload PDF File

Text

Description automatically generated

* Select HIPPA file from the clients folder

Graphical user interface, application

Description automatically generated

* Once the file opens at the end of section 2 you will fill in the Name of the provider along with Physician Billing records request in RED (you do not put the hospital name only the provider)

Graphical user interface, text

Description automatically generated

* At the end of Section 3 you will type in Date of Service along with the date of accident-current



* Make sure clients DOB is correct at the top of the form (sometimes they put the date they signed)

Text

Description automatically generated

* Make sure the statute of limitation is filled out in section 8 (if the accident was in Washington the SOL is 3 years and in Texas its 2 years from the date of accident)

Text

Description automatically generated

* Make sure the form is signed and dated (if not signed send a form to client in DocuSign to be completed)

Background pattern

Description automatically generated with low confidence

* Select Apply Change

A picture containing text

Description automatically generated

* Select Download

A picture containing chat or text message

Description automatically generated

* Once downloaded open file and save in clients folder as (Physician HIPPA)

**Step 6: Go back to chart swap and submit request**

* Once you have selected new request it will take you to fill out client information
  + You will only need to fill out the first name, last name, and DOB

Graphical user interface, text, application, email

Description automatically generated

* For the second part Record type will be billing, Scope stays as is, Start date ( the date of accident, and the end date is the day record request is being sent)

Graphical user interface, text, application, email

Description automatically generated

* Select Instant download for delivery options and select next

A picture containing chart

Description automatically generated

* Next select choose file and upload Physician HIPPA form from clients folder that was previously saved

Graphical user interface, text, application

Description automatically generated

* Next select submit

Application

Description automatically generated with medium confidence

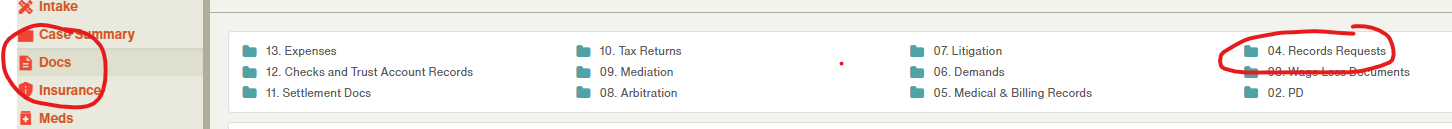
* Once submitted you will see a due date on when record will be available

Text

Description automatically generated

**Step 7: Go back to Filevine and upload Physician HIPPA form in record request**

* Go documents and select 04. Record Request



* Next Select Upload File (located at the top right)

Graphical user interface, text

Description automatically generated

* Select Add Files

Graphical user interface, text, application, chat or text message

Description automatically generated

* Select and upload the physician HIPPA

**Graphical user interface, text, application

Description automatically generated**

**Step 8: Go to communications and write a note that Record Request for Physician Billing has been requested**

* Select Communication

Graphical user interface, diagram, email

Description automatically generated

* Write a note on what was done to the clients file and select save

**Graphical user interface, text, application, email

Description automatically generated**