**How to Request Physician Record**

**Index:**

Step 1: Open Chartswap and Login

Step 2: Find the Provider for the hospital

Step 3: Open Sejda and Login

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

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

Step 6: Go back to chart swap and submit request

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

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

**How to Request Physician Record**

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

* <https://www.chartswap.com/>
	+ Username: 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



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



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



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



* 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 so



**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

 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: 

Step 2A:

Step 2B: 

* Once HIPPA form is located click the form once



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

 

* 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



* Select Edit PDF document



* Select upload PDF File



* Select HIPPA file from the clients folder



* 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)



* 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)



* 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)



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



* Select Apply Change



* Select Download



* 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



* 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)



* Select Instant download for delivery options and select next

 

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



* Next select submit



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



**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)



* Select Add Files



* Select and upload the physician HIPPA

****

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

* Select Communication



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

****