Articles

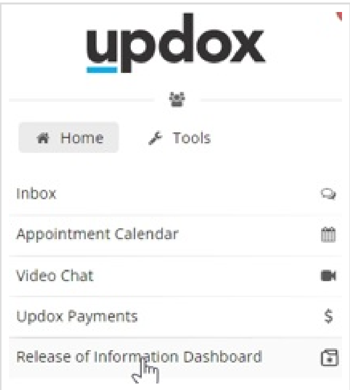
Last Modified on 02/22/2024 12:29 pm EST

Navigating the Dashboard

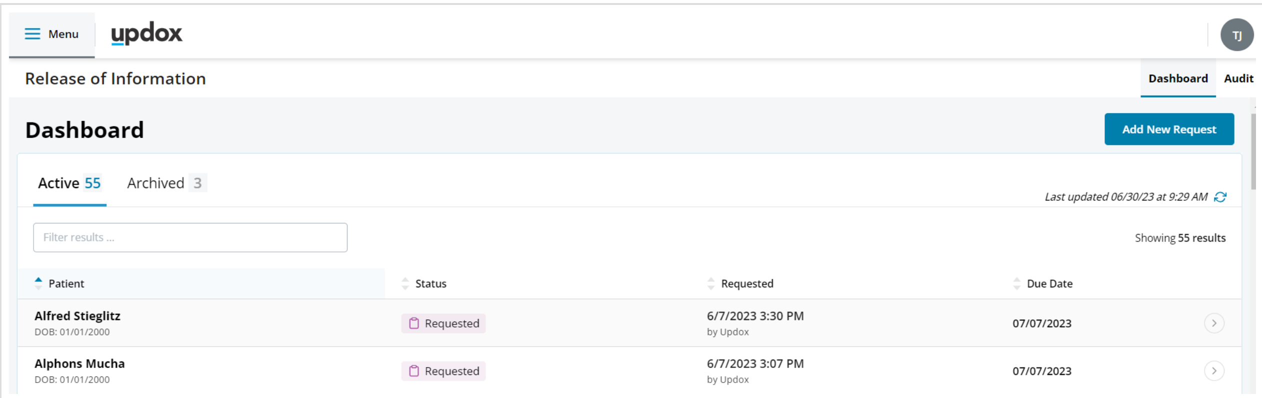
Navigating the Dashboard

Opening the Dashboard

To access the Release of Information Dashboard, click on "Release of Information Dashboard" in the Home menu.



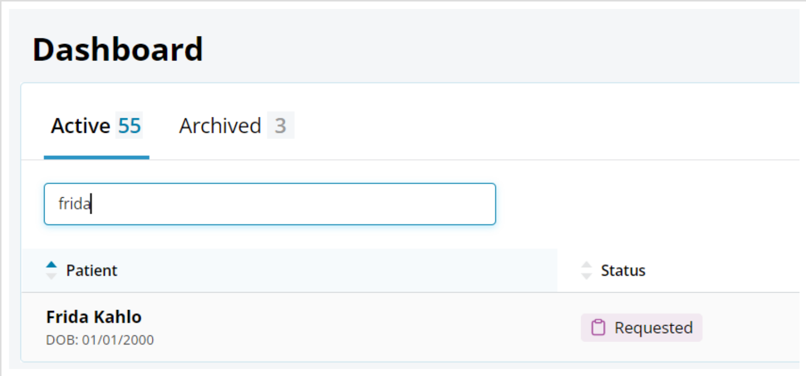
The Release of Information Dashboard will start out empty, but as you add requests, you will be able to see who the requests are for, the status of the requests, who requested them, and when they are due. There are 2 tabs here, an "Active" tab and an "Archive" tab. All requests start in the "Active" tab and stay there until you choose to archive them.



SEARCHING & SORTING

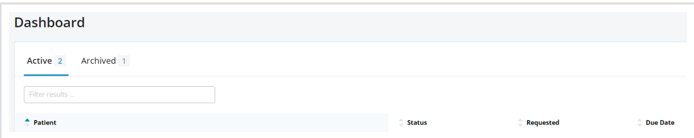
Searching

You can quickly search for specific requests by typing into the search field. If something is visible in the Dashboard, you should be able to search for it.



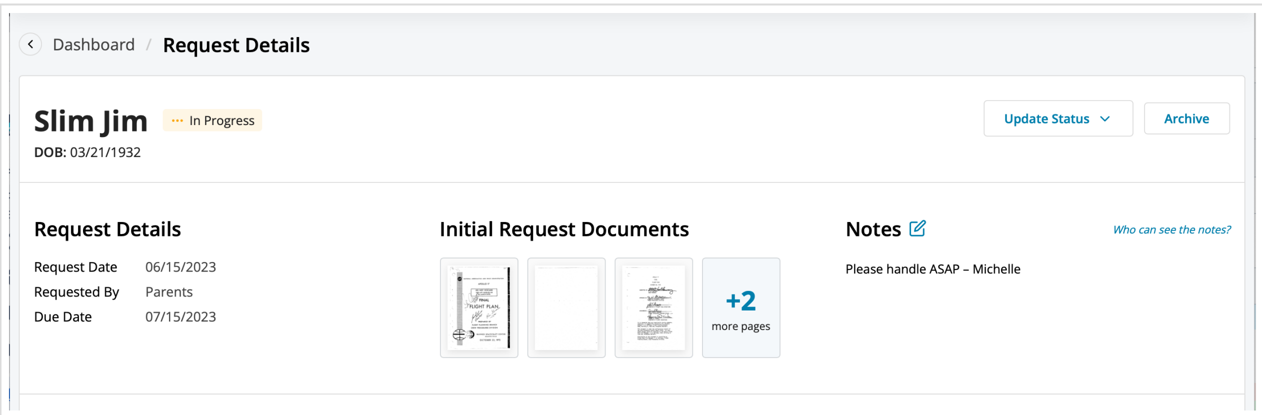
Sorting

You can also choose to sort your requests by clicking on the column headers to sort by that column.



VIEWING REQUEST DETAILS

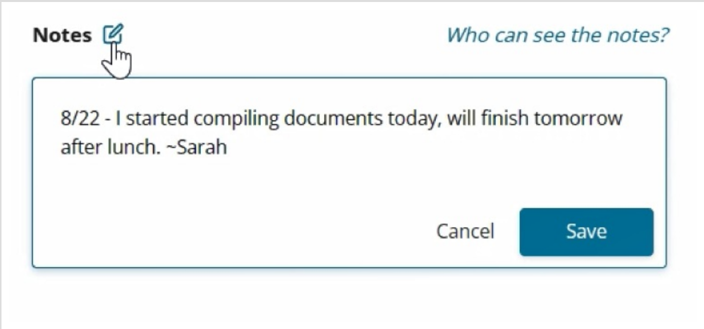
To view more information on a specific request, you can just click on any request in the Dashboard to jump into the request details page. The request details screen is where you will be able to view details about the request, as well as make changes to the request.



NOTES

You can add notes to a request to help you remember where you left off or to pass info along to a coworker who may also be working the request. These notes are *only* visible here in the Dashboard, they are not printed or included on any documentation you generate.

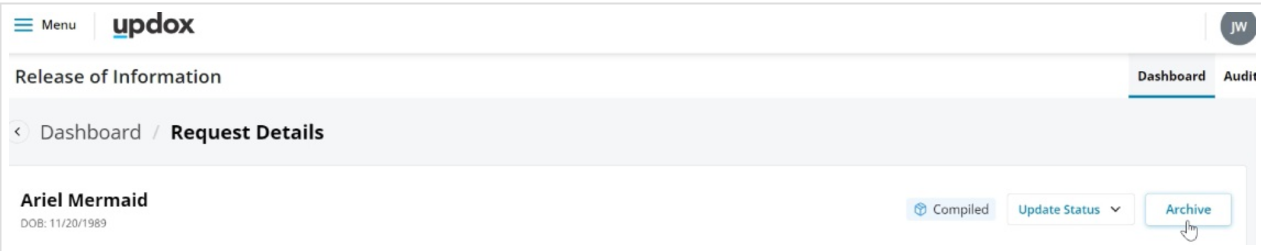
To add or edit the notes, click the “Edit” icon next to the “Notes” header, enter your notes in the text area, and click “Save”.

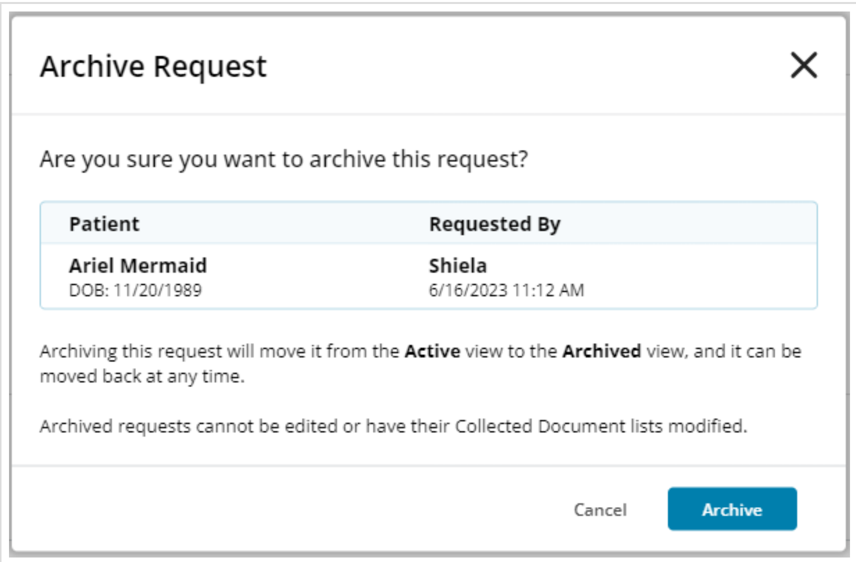


ARCHIVING & UNARCHIVING

Archiving

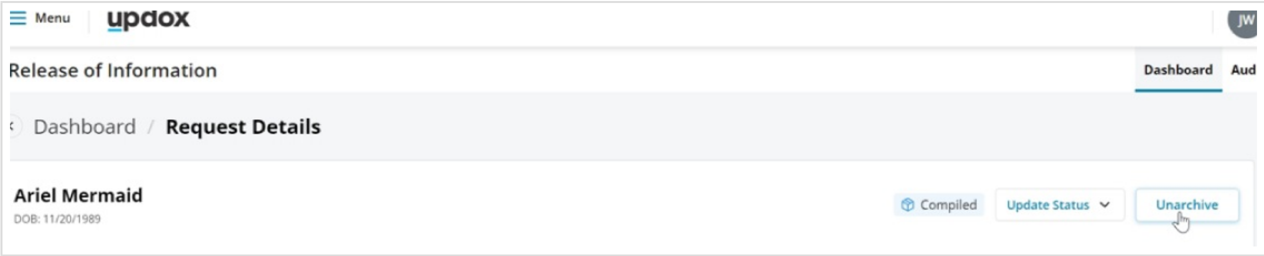
You choose when to move requests to the “Archive” tab. To move a request, click the “Archive” button on the request details page and confirm the move.





Unarchiving

If you change your mind or accidentally archive a request, you can move the request back to the “Active” tab by clicking “Unarchive”.



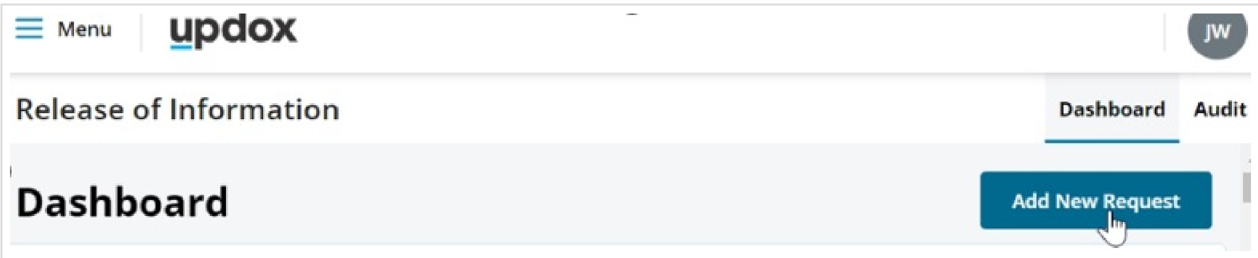
Creating a New Request

Creating a New Request

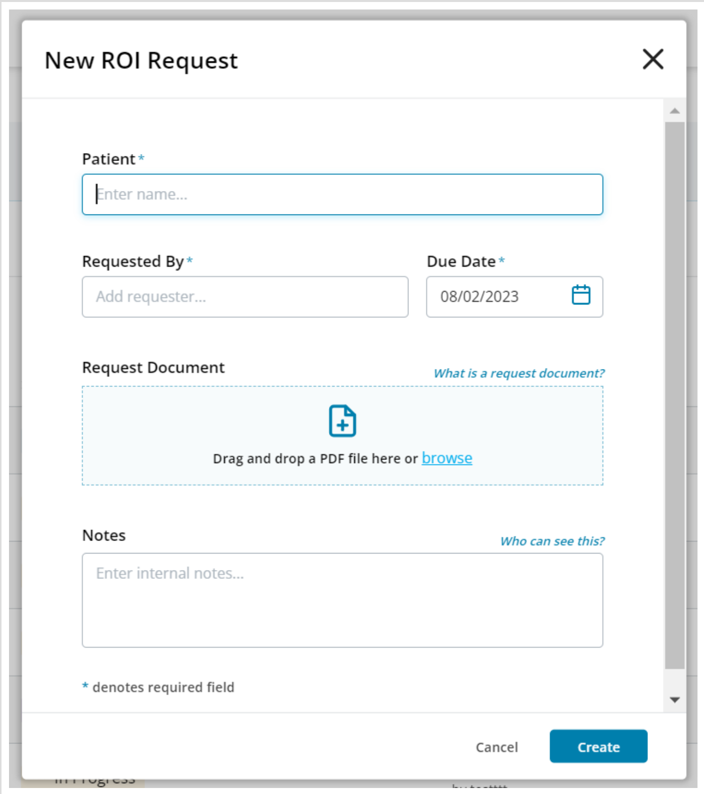
As you receive requests for medical records through your usual channels (in-person, phone calls, faxes, mail, etc), you can easily add them to the Release of Information Dashboard so you can keep track of them all in one place.

Creating a Request in the Dashboard

You can click on the “Add New Request” button at the top of the Dashboard to add a new request to the Dashboard.

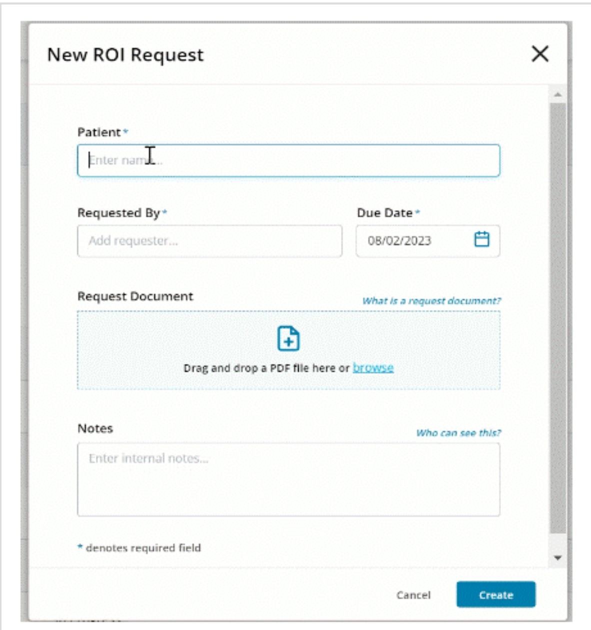


The request creation screen will pop up.

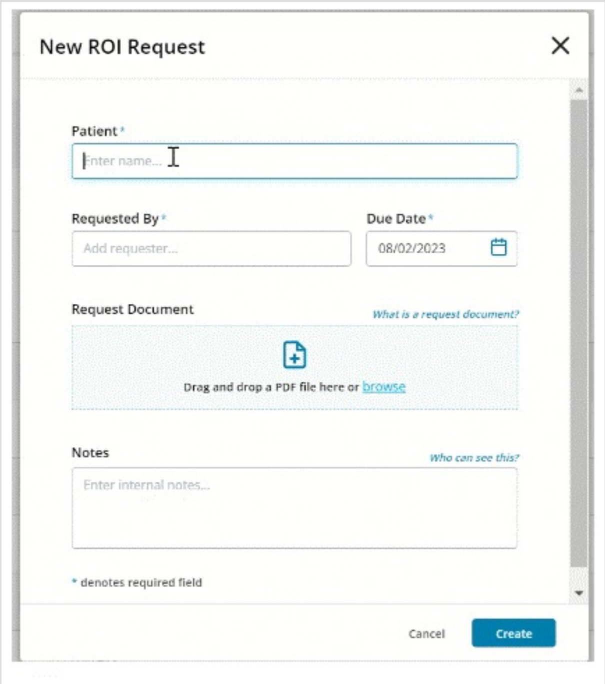


Patient Search

If your patients are in the Updox address book, you can search for and select the patient by starting to type their name.



If the patient you are searching for is not in the address book, you can choose to create a one-time entry for the release of information request.



Please note: The one-time patient entries you create here are *only* used to identify the specific requests where you create them. They are not added to the Updox address book or synced with your EHR.

Also, feel free to use the one-time entry capability to create requests that aren't specifically "for" a patient. You can use any label you like, it doesn't actually need to be a patient. You may find other uses for the Release of Information product outside of just gathering requested medical records for outside parties.

Requested By

You can enter whatever you like into the "Requested By" field; it is just meant to help you know where the request came from. You can be as specific or generic as you like. For example, if information was requested by a patient's parents, you could just type "Parents" in the field. Alternatively, you could enter the business name and fax number where the requested records should be returned, it's completely up to you.

Due Date

You can also set the due date for when the release of information request needs to be completed. We understand that many requests don't have explicit due dates, but there are some that do. You can use the field to help set priority, too, by selecting due dates that are relatively soon. The default due date is set to 30 days from whenever you are creating the request.

Request Document

You also have the ability to attach the documentation about the request that you received from the external requesting party. This may be a scanned letter or a PDF you received via email.

Only one request document can be added to a request, and it is entirely optional. You do not need to add a request document if you don't have one (or don't need it). If you don't have a request document at the time of creation, you are able to add one later.

Notes

You can also choose to add notes when you create the request. These are the same notes that are visible on the request details page, and as a reminder, they are not included on any generated documentation. You may choose to use these notes to request certain individuals look at this request, or to indicate the priority of the request.

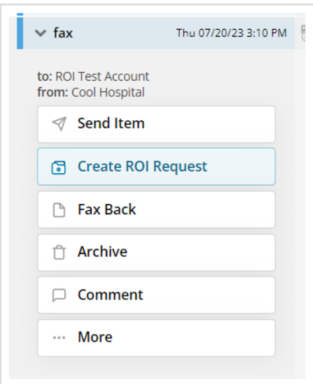
Creating a Request from the Inbox

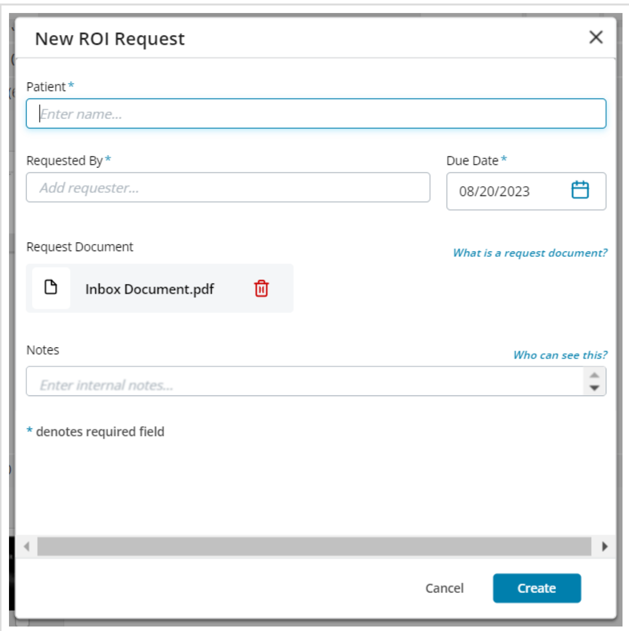
You can also create release of information requests directly from the Updox Inbox! If you have a fax in your inbox that is asking for medical records, you can use the new "Create ROI Request" button to show the same creation dialog as in the Dashboard, and the fax in question is automatically added to the request as the Request Document. Just fill out the rest of the information, click "Create", and you're good to go; the request is ready and waiting for you in the Dashboard.

This "Create ROI Request" is currently available on faxes, uploads, and print jobs that are in your inbox.

Please note: If you don't see the "Create ROI Request" button, it may be under "More" in your button list. Updox admin users have the ability to edit the inbox buttons, choosing the button order and which ones are visible on the inbox versus under the "More" button.

To move it out of the "More" area, ask one of your admin users to navigate to the Admin → Inbox Buttons menu, make sure the "Create ROI Request" button is checked, and then reorder it based on your preference.



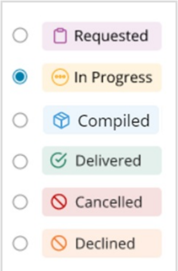


Understanding the Statuses

Release of Information Request Statuses

STANDARD WORKFLOW

There are 6 statuses you'll see as you interact with the Release of Information application.



Here is the typical lifecycle of a request:

1. Every new Release of Information request begins in the **Requested** status.
2. As soon as the first collected document is added to the request (by uploading or printing), the status is automatically moved to **In Progress**.
3. From here, you can keep uploading or printing in documents until you have gathered all the necessary information.
4. Once you have everything you need, you use the *"Compile"* button to take all of your collected documents and combine them into a single document for distribution; the status is automatically moved to **Compiled** at this point.
   - Note that if you have already compiled a document once, and have added or modified the collected document list, the *"Compile"* button will be renamed to be a *"Recompile"* button.
5. You can now download your combined document as a single PDF, or send it out as a fax.
6. The last status is **Delivered**, but we never move the request into that status ourselves. Because we don't know when the document has been successfully delivered to the interested party, we leave that status up to you. You can use the *"Update Status"* button to set the status to **Delivered** whenever you decide it is appropriate.

DECLINING/CANCELLING A REQUEST

There are two statuses you can use for requests that no longer need to be worked:

- **Declined** – This status should be used when you are not planning to return records. If you receive a request that you cannot (or do not want to) fulfill, you can choose to decline the request. Using the *"Update Status"* button, you can manually change the status to **Declined**. The system will prompt you for a reason before changing the status.
- **Cancelled** – This status should be used when the requestor no longer wants the information. If you have received a request and then later heard from the requestor that they no longer need the information (for any reason), you can use the *"Update Status"* button to manually change the status to **Cancelled**. The system will prompt you for a reason before changing the status.

Other Things to Know

There are a few other useful things to know about when working on your Release of Information requests.

Archiving & Unarchiving

- You can choose to archive a request at any time. Archiving a request moves it out of the "Active" tab and into the "Archive" tab, as a way of keeping your "Active" tab focused on work that still needs to be done.
- You can also unarchive a request if you need to restart work on it. Unarchiving a request moves it out of the "Archive" tab and back to "Active".
- There will always be either an *"Archive"* or *"Unarchive"* button available on the request details page, depending on where the request is currently located.

How Does the Status Affect Functionality

We have chosen to put some limitations in place to help enforce the workflow and hopefully reduce confusion and mistakes.

Dashboard Restrictions

- If a request has Collected Documents, you are only able to reorder or delete those Collected Documents when the status is **In Progress**. This prevents the gathered documentation from changing when other users might not expect it. For example, if a request is in the **Delivered** status, and a user were to delete a document from the Collected Document list, it may look like the documentation that was delivered without that deleted document.

However, there will be times when you do need the ability to modify the Collected Documents. One potential situation could be someone in your office compiled the document, and then you realized the request mistakenly contained a document for a different patient.

In situations like this, you just need to use the *"Update Status"* button to change the status back to **In Progress**, make the necessary changes, and then use the *"Recompile"* button to generate an updated version of the documentation to return.

Printer Restrictions

In order to keep the list of requests in the printer at a reasonable size, we have put some restrictions around which requests show up in the list of requests you can print into:

- Requests must be on the "Active" tab, you cannot print into archived requests.
- Requests must be in either the **Requested** or **In Progress** status.

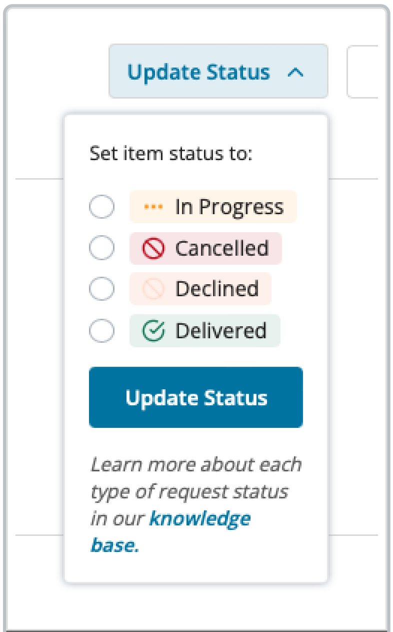
If these two things aren't true, you will need to modify the request to make sure they are both true before beginning to print into them. For example, you may need to move the request back to the "Active" tab or may need to update the status from **Compiled** back to **In Progress**.

Allowed Status Changes

The contents of the *"Update Status"* dropdown depend on the current status of the request – we only show you the valid statuses you can change to. For example, you can't change the status to **Delivered** if the request is still in the **Requested** status (because there are no Collected Documents that have been compiled into the final documentation). Here is the list of valid manual status changes:

- **Requested** → you can change the status to **Declined** or **Cancelled**
- **In Progress** → you can change the status to **Declined** or **Cancelled**
- **Compiled** → you can change the status to **In Progress**, **Delivered**, **Declined**, or **Cancelled**
- **Delivered** → you can change the status to **In Progress**

- **Declined** → you can change the status to **Requested** or **In Progress** (depending on whether or not there are collected documents present on the request)
- **Cancelled** → you can change the status to **Requested** or **In Progress** (depending on whether or not there are collected documents present on the request)
- If a request is not in **In Progress**, you cannot reorder or delete collected documents.

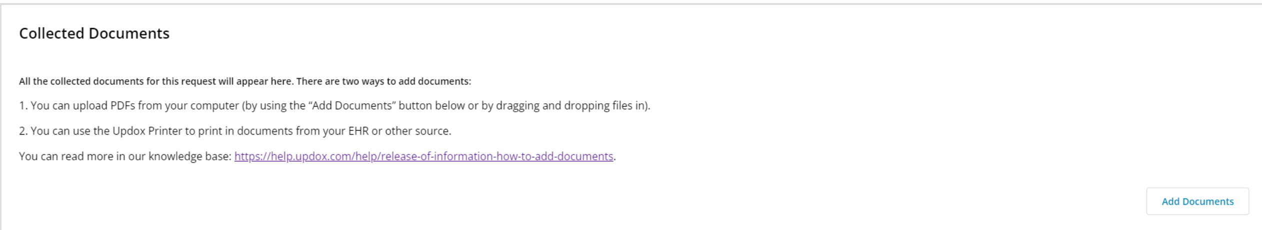


The "Update Status" dropdown for a request in the **Compiled** status

---

Adding Documents to a Request

Add Documents to a Release of Information Request



There are 2 ways to add documents to a Release of Information request:

1. Uploading PDF files from your computer
2. Printing from your EHR

Uploading PDF Files

If you have files on your computer that you would like to add to a request, you can do so in by clicking the *"Add Documents"* button on the request details page. This brings up a file browser where you are able to navigate your computer's folder structure and select the file or files to upload.

Alternatively, you can drag and drop files from a folder on your computer directly into the Collected Documents area. These files will then be added to the Collected Documents list.

You are able to upload multiple files at once with either approach, the *"Add Documents"* button or drag and drop.

If you are adding files this way, keep in mind that we only accept PDF files at this time. The *"Add Documents"* button will not let you select non-PDF files, and if you drag and drop non-PDF files in, we will just ignore them (and not add them to the Collected Document list).

Printing from the Updox Printer

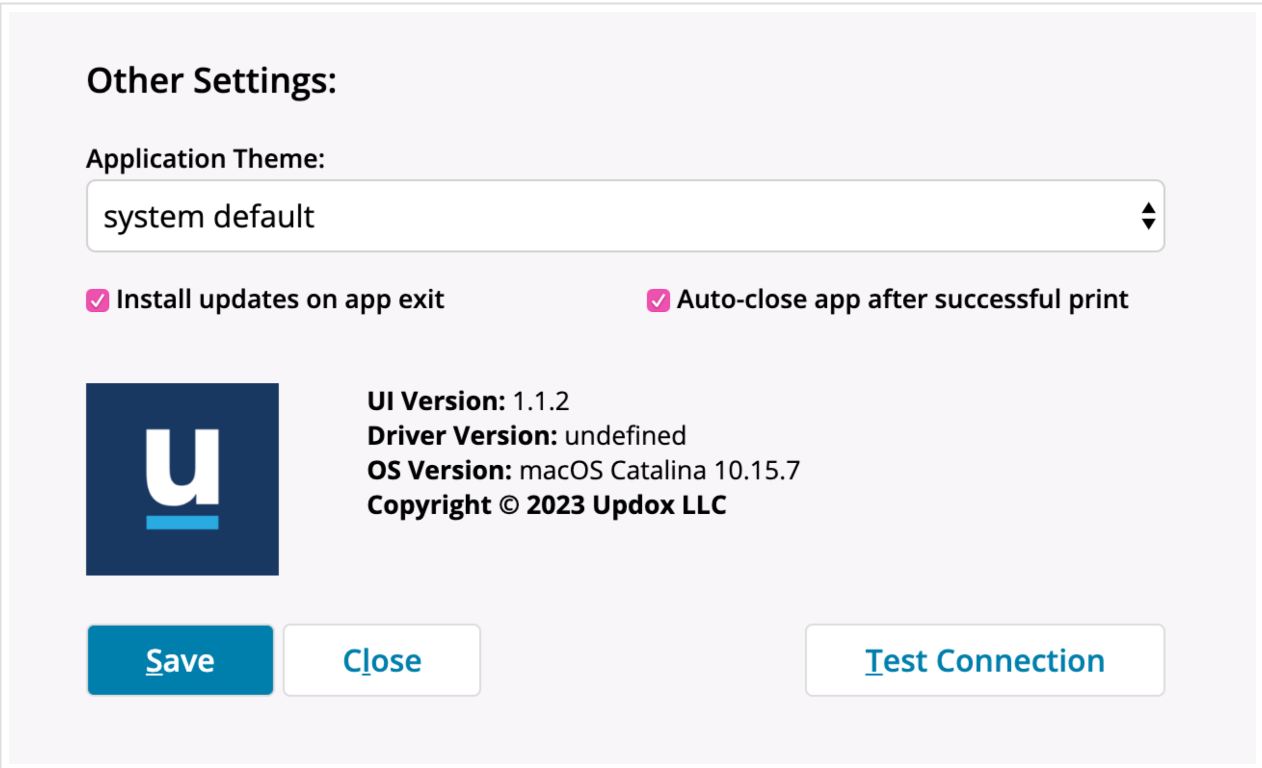
If you don't have an existing PDF of a document you would like to attach to a Release of Information request, you can use the Updox printer to print in *anything* from your computer.

Step 0

In order to print into a Release of Information request, you'll need to have a recent version of the Updox Printer (or Print to Inbox printer) installed. You will need version **1.1.2** (or higher). Earlier versions of the printer can only print documents into the Updox Inbox and do not include the Release of Information features.

If you're not sure, here's how to find the version you're running.

And if you don't have the printer yet, you can get it here: https://help.updox.com/help/installingupdoxprinter.

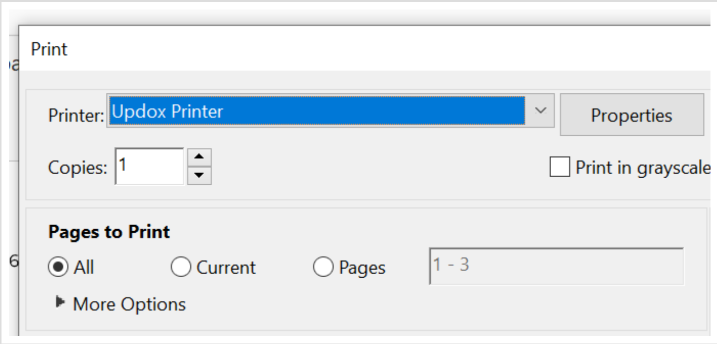


Step 1

Find something you would like to add to a Release of Information request. It could be in your EHR, in your PM, or in any application that has the ability to print.

Step 2

Print your selected document and choose the “Updox Printer” on the printing screen.

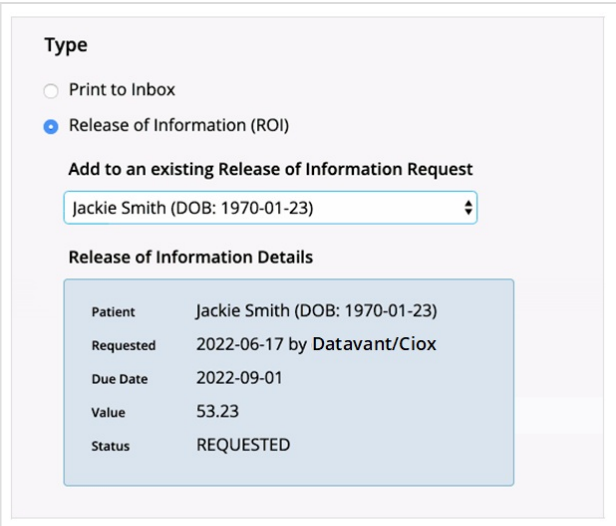


Step 3

If you have at least 1 active Release of Information request, then you will see 2 options to choose from: **Print to Inbox** and **Release of Information**. Select the **Release of Information** option and then choose the correct request from the drop-down. You will be able to review some information about the selected request before anything is uploaded.

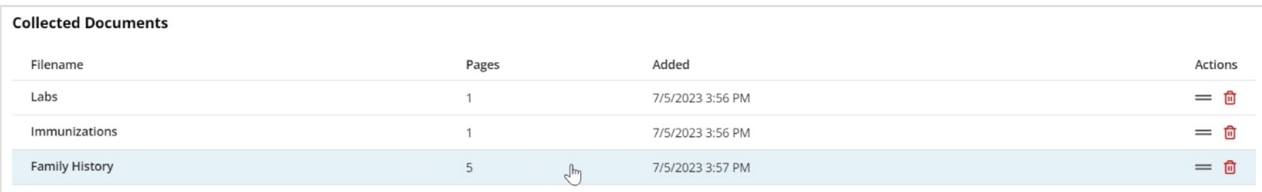
If you don’t have any active requests, the printer will automatically send the document to the Updox Inbox as usual.

NOTE: A request must be in 'Requested' or 'In Progress' status in order to print collected documents to it.



Step 4

Click the **Send PDF** button and wait for the success message. Refresh the request details page and you should see your printed document in Collected Documents.


Collected Documents

Filename	Pages	Added	Actions
Labs	1	7/5/2023 3:56 PM	
Immunizations	1	7/5/2023 3:56 PM	
Family History	5	7/5/2023 3:57 PM	

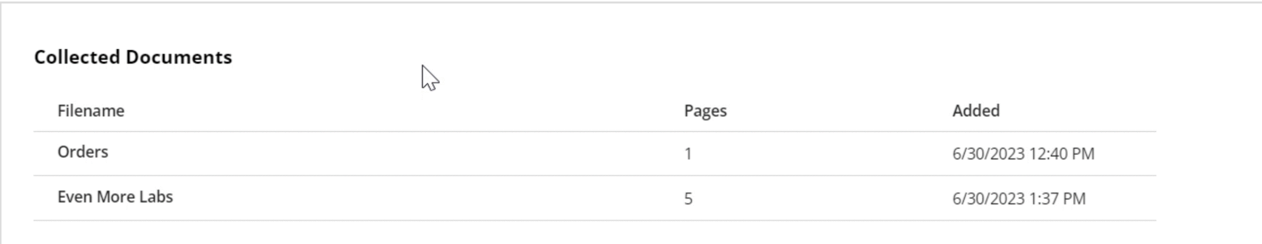
Managing and Delivering Collected Documents

Managing your Collected Documents

Once you have one or more Collected Documents attached to a request, you may find that you want to modify the list of documents. The documents can be renamed, reordered, or deleted prior to compiling the request.

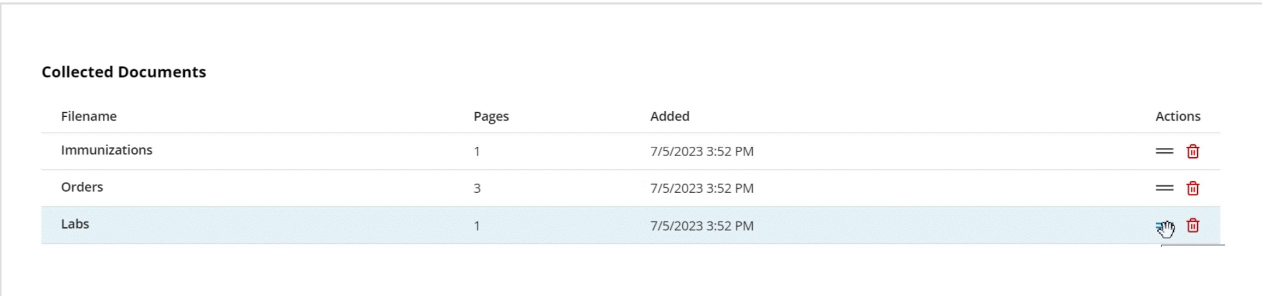
Renaming

You will probably find that documents coming in through the Updox printer may have unhelpful names (a common example is “Msxps”). To rename collected documents, you can click on the pencil icon next to the document name. Type in a new name, hit the [Enter] key or click *“Save”*, and you’re done.



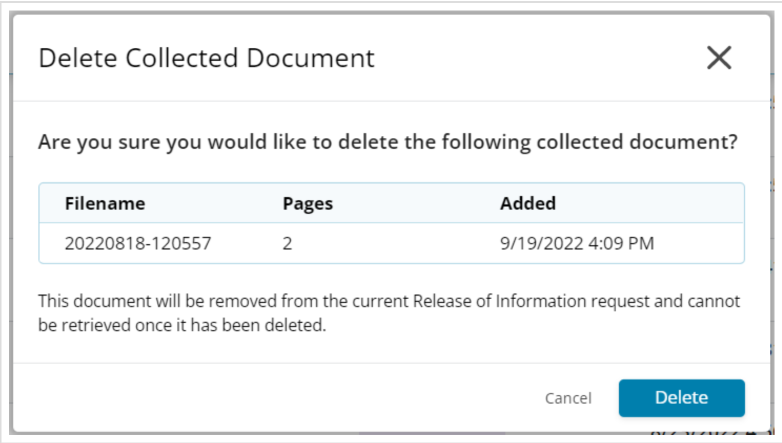
Reordering

You may not add documents to the list of collected documents in the same order you would like to structure the final documentation. To reorder a collected document, you can drag the reorder icon (the set of double bars) to wherever you would like to move it. You can also click on the reorder icon to get a popup menu of reorder options.



Deleting

If you initially added more documents than you needed, or if you accidentally uploaded a file to the wrong patient’s request, you may find yourself wanting to remove a collected document before you compile the final documentation. To delete a collected document, you can click on the trash icon next to the document you want to delete and then confirm your choice.



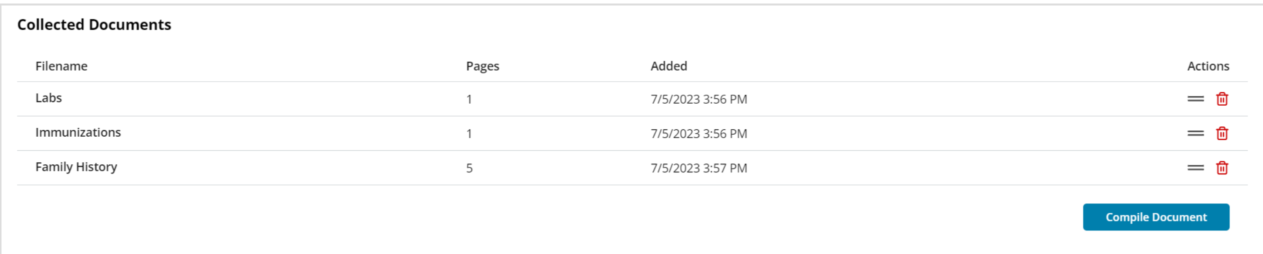
Delivering your Collected Documents

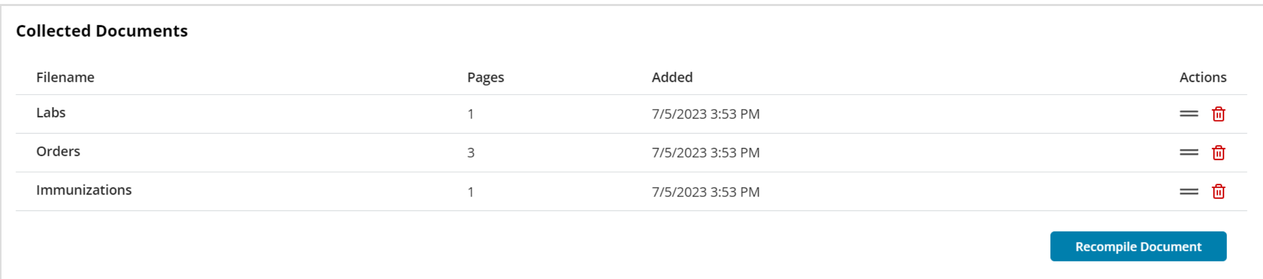
Once you have gathered all the documentation you need to fulfill the request, you're ready to return the documentation to the requesting party.

Compiling

The first step is actually compiling your list of documents into one final document. You can use the *"Compile"* button to collate all your collected documents into one PDF.

You may sometimes see the button as *"Recompile"*. This happens if you have already compiled the document once and then made changes to the list of collected documents.





Clicking the *"Compile"* button again if you haven't made any changes to the list of collected documents doesn't do anything, since the system is aware that nothing has changed with the documents.

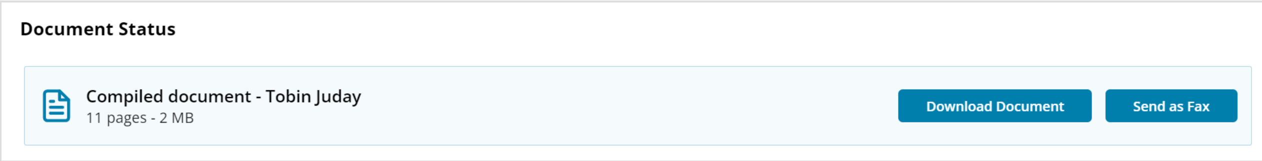
After the system has compiled your final documentation, you have two options, download it or send it as a fax.

Downloading and Sending as Fax

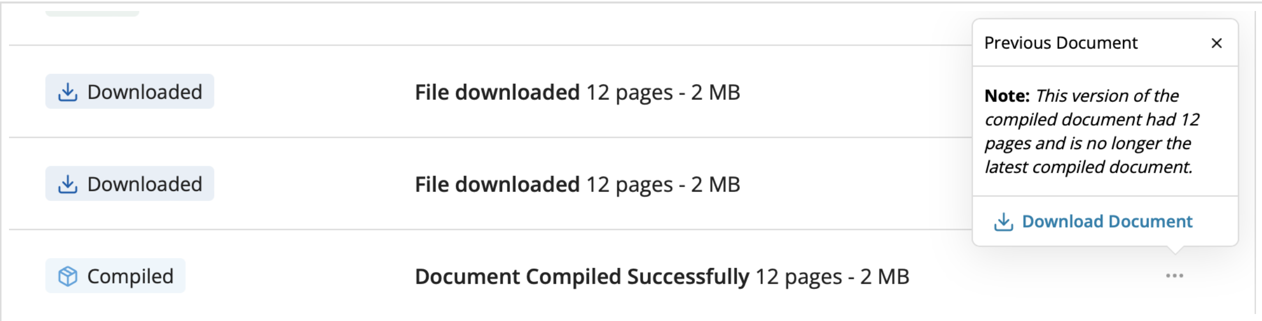
Once your documents have been compiled, you can choose to download them to your local machine for printing or upload them to fax them to the recipient, or both!

Downloading

The *"Download Document"* button will download the compiled, final documentation to your local machine. This will allow you to print a hard copy and/or upload it to a designated location. The *"Download Document"* button always downloads the most recently compiled version of the documentation.

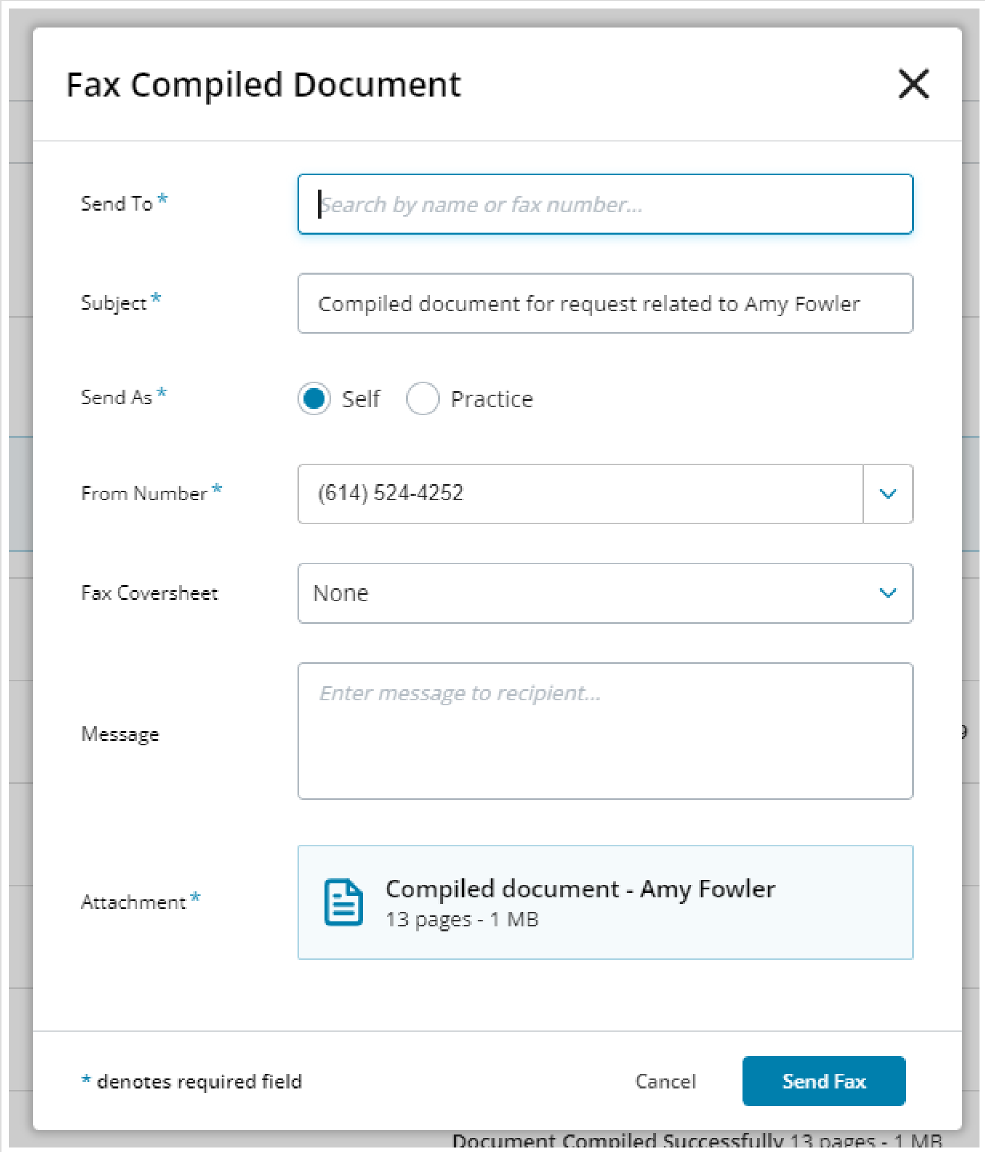


If you have recompiled a document, and want to download a PDF that is *not* the most recent version, you have the ability to download a previously compiled version using the popup menu on the relevant Compiled action in the Document Status area.



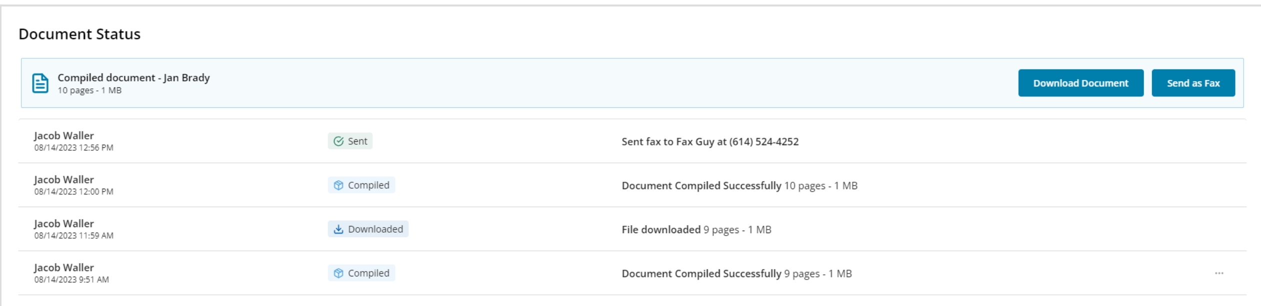
Sending as Fax

The *"Send as Fax"* button allows you to fax the latest version of the compiled document directly to the requestor, similar to how you fax items from your Inbox today.



Document Status

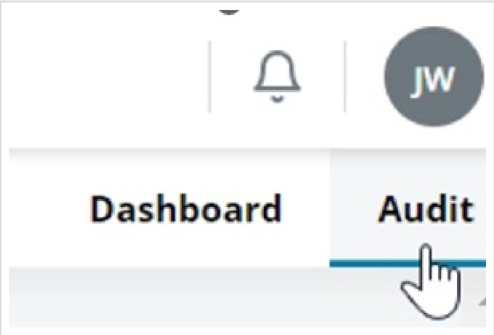
You can track the activity of your compiled documents in the Document Status area.



Viewing the Audit Log

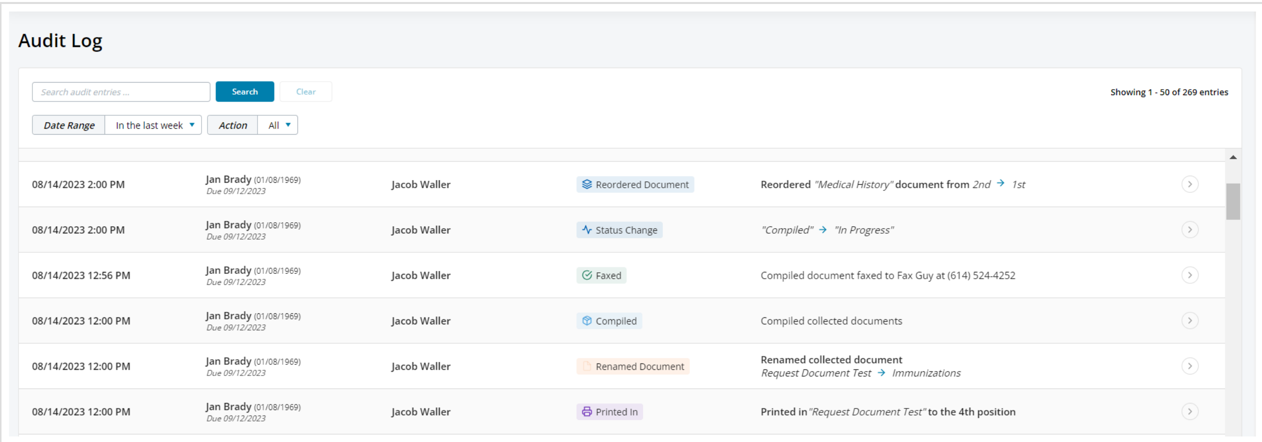
Viewing the Audit Log

The Release of Information app includes an audit log where you can view changes made to your release of information requests. To view the audit log, click on the 'Audit' tab.

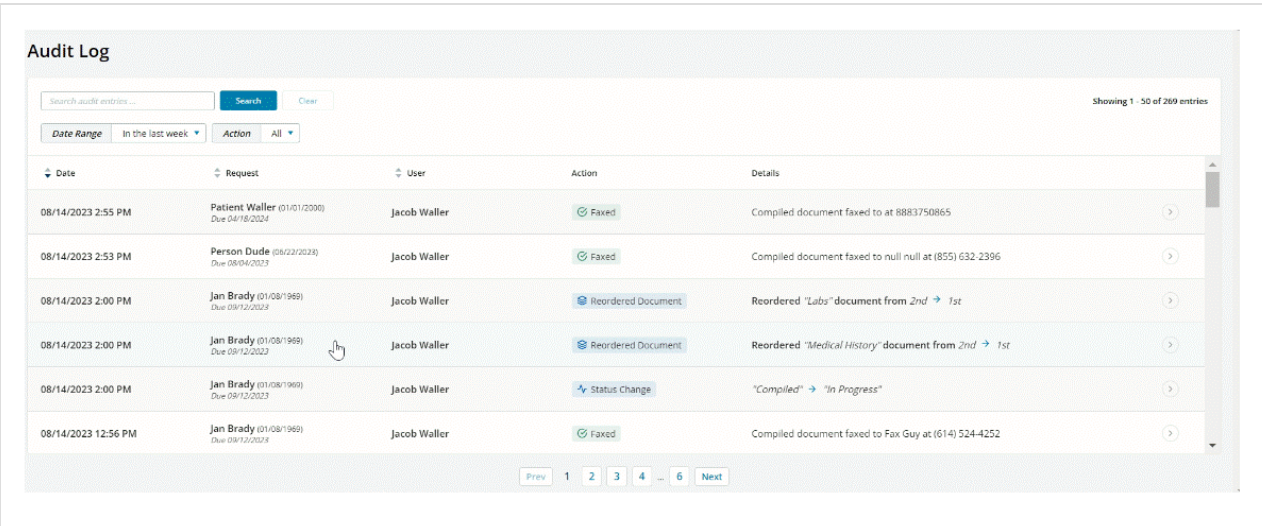


Within the tab, you can view:

- The date the request was created
- The patient related to the request
- The user that created the request
- The action taken on the request
- Details about the action

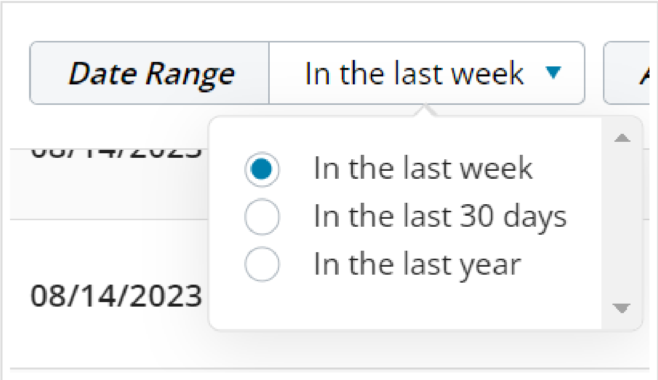


To see more details about a request, simply click on the row and the request details page will open.

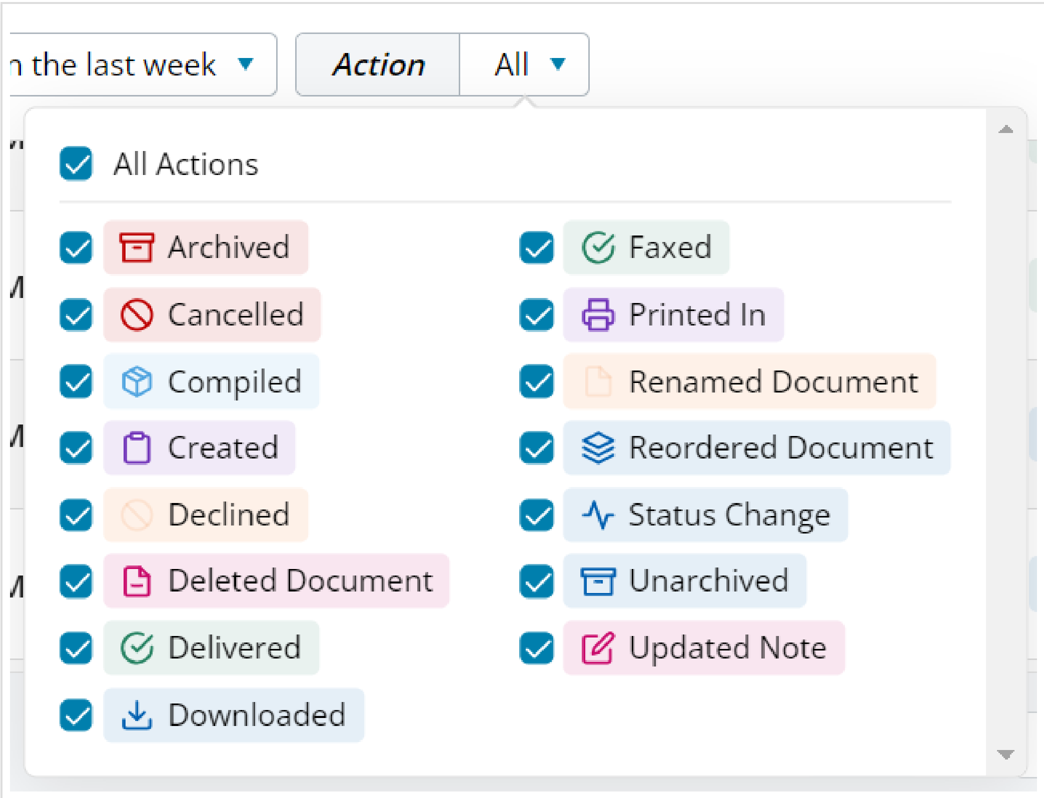


Searching and Filtering

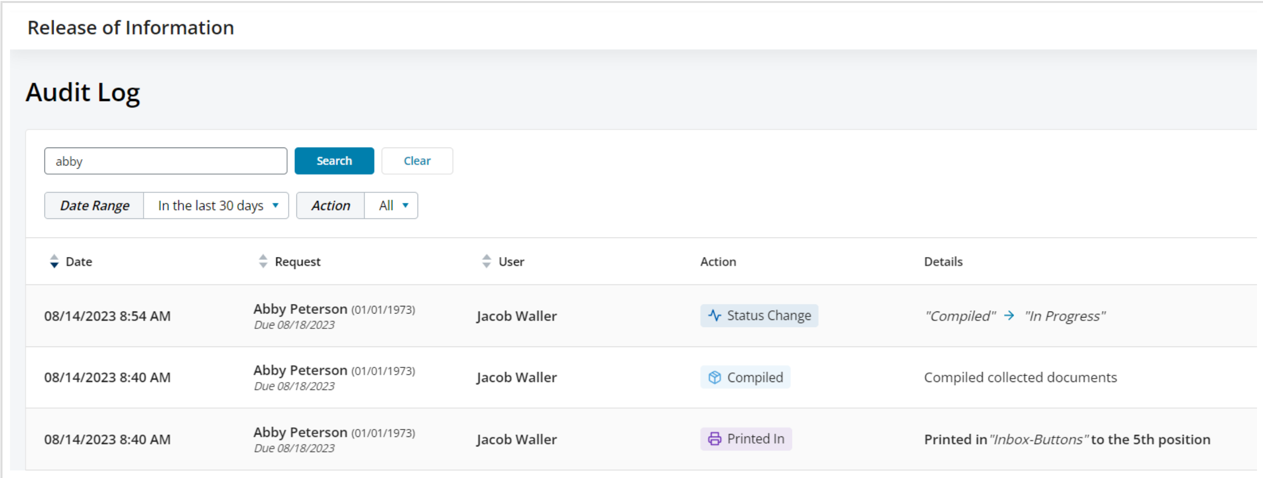
Use the Date Range selector to view a different date timeframe.



Use the Action selector to see only actions you are interested in.



Use the search box to search for a specific request within a specified date range.


Release of Information
Audit Log
abby
Search
Clear
Date Range
In the last 30 days
Action
All
Date
Request
User
Action
Details
08/14/2023 8:54 AM
Abby Peterson (01/01/1973)
Due 08/18/2023
Jacob Waller
Status Change
"Compiled" "In Progress"
08/14/2023 8:40 AM
Abby Peterson (01/01/1973)
Due 08/18/2023
Jacob Waller
Compiled
Compiled collected documents
08/14/2023 8:40 AM
Abby Peterson (01/01/1973)
Due 08/18/2023
Jacob Waller
Printed In
Printed in "Inbox-Buttons" to the 5th position