



# Digital Desk Guide

Your guide to Medchart best practices

**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.com](mailto:contact@medchart.com) or reach out to your Client Success Manager.



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



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



## **Admin Functions**

[Add a Credit Card to your Account](#)

[How to Generate Account Statement](#)

[How to Add an Affidavit](#)



## **Authorizations**

[How to Collect Clients Signature via Email](#)

[How to Collect Clients Signature via SMS](#)

[How to Use your Firm's Authorization](#)

[How to Upload Client Signatures](#)



## **Clients**

[Add a New Client](#)

[How to Add a Client with a Substitute Decision Maker](#)



## **Requests & Records**

[How to Submit a Request](#)

[How to Download Records](#)



## **Invoices**

[Approve Provider Invoices](#)

[How to Dispute an Invoice](#)



**To view a full list of support articles please visit:**

[Solutions : \(medchart.com\)](#)



## The Benefits of Using Medchart Consents

Although we offer the flexibility to request your clients' medical records using our authorizations or your own, we highly recommend opting to use Medchart authorizations for your requests. Using our authorizations is easy! We just need your client's signature and initials on a few forms to provide you with a seamless request process. You can choose to either collect your client's signature electronically via email or text message, or you can simply crop their signature from your own forms.

Here is an overview of just a few reasons why we believe it makes sense to take that extra step when setting up a client's profile to add their signature and initials.

Pros	Cons
Reduced turnaround times on requests	The client's signature and initials must be collected electronically or a copy of them must be uploaded to their profile
Lower fees on invoices from providers	
Institution-specific authorizations are completed for you	
Unique authorizations are generated and populated for each request – gone is the need to edit authorizations yourself before sending them to providers!	

### Check out these help articles on:

[How to Collect Clients Signature via Email](#)

[How to Collect Clients Signature via SMS](#)

**Medchart knowledge base**

support@medchart.com



## Using your Firm's Authorization?

We understand collecting your client's signature is not always easy or possible, so you can certainly move forward with using your own HIPAA or HITECH authorization to request their records. However, you must provide a fully executed copy of your firm's authorization. When we say executed, what we really mean is that the authorization must include the provider's information (name, address, and contact info), the records required for release, the date range, client's information along with their signature/initials, and the date the authorization was signed.

Please keep in mind that if you choose to use your own authorization, you will need to execute an authorization on your end each time a new request is placed. To make things simpler for you, we strongly recommend collecting your client's signature and initials through Medchart.

Check out this help article: [How to Use your Firm's Authorization](#)

Here are some notes to keep in mind when making this decision of using your firm's authorization.



Pros	Cons
You do not need to collect the client's signature and initials, which can be difficult to do with older and less tech-savvy clients	The authorization must be edited and uploaded every time a request is made. The authorization must include the client's name and signature, provider's name and address, the records being requested, the dates of service, the date, and a note about sending the records to and communicating with Medchart regarding the request
	Providers are routinely charging higher fees for records when a law firm's authorization is being used for the request
	Providers are taking longer to process requests that use law firms' authorizations due to confusion over language used on the document
	Providers often send the records or invoices directly to law firms' offices when their authorizations are used for requests, which removes the benefit of being able to manage and receive all information electronically



## Adding Affidavits

Adding affidavits is a key part for many firms who require a written certification from providers confirming that they have provided all records in possession within the date range requested. In addition to that, an affidavit can be signed off by the provider to confirm that they do not have records. Check out our article on [How to Add an Affidavit](#) before submitting a request.

## Track Your Request

Did you know we have a section where you can track and view all updates on your request?

Simply go to your request details page and scroll down to “tracking Records” where you will be able to view the status of each request!

**Tracking Records**  
Fulfilled

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Records: All Records  
Add Ons: None

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**Latest Updates**

09/10/2020	Record Released Record Blank Document.pdf has been released
07/02/2020	Sent Fax to Provider fax sent to 8328259056 ...
07/02/2020	Received Fax from Provider From/To: (346) 808-5403 ...

[View All Updates](#) ▾

Check out this article to learn more: [How to View Tracking History](#).

