



# 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.ca](mailto:contact@medchart.ca) or reach out to your Client Success Manager, Nina, at [nina.polic@medchart.com](mailto:nina.polic@medchart.com).



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



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



## **Admin Functions**

[Download Monthly Invoices](#)



## **Clients**

[Add a New Client](#)

[Edit a Client's Information](#)



## **Requests**

[Request Records from a Healthcare Provider](#)

[Request an OHIP Summary](#)

[Submit a Request in Action Items](#)

[View Request Tracking History](#)



## **Invoices**

[Approve a Provider Invoice](#)

[Dispute a Provider Invoice](#)

[What if you Receive Documents directly from a Provider](#)



## **Records**

[Download Records](#)

[Download Diagnostic Imaging](#)



## 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	
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**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	
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**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	
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**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	
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**This log is for a payment.**



2020-10-20	Fax sent to 16475555555	
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**This log is for a follow-up fax.**

2020-10-22	Reminder to 16475555555	
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**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	
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**This log is for a phone call follow-up.**

