



# Simple & Secure Records Retrieval Portal

REFERENCE GUIDE  
August 2023



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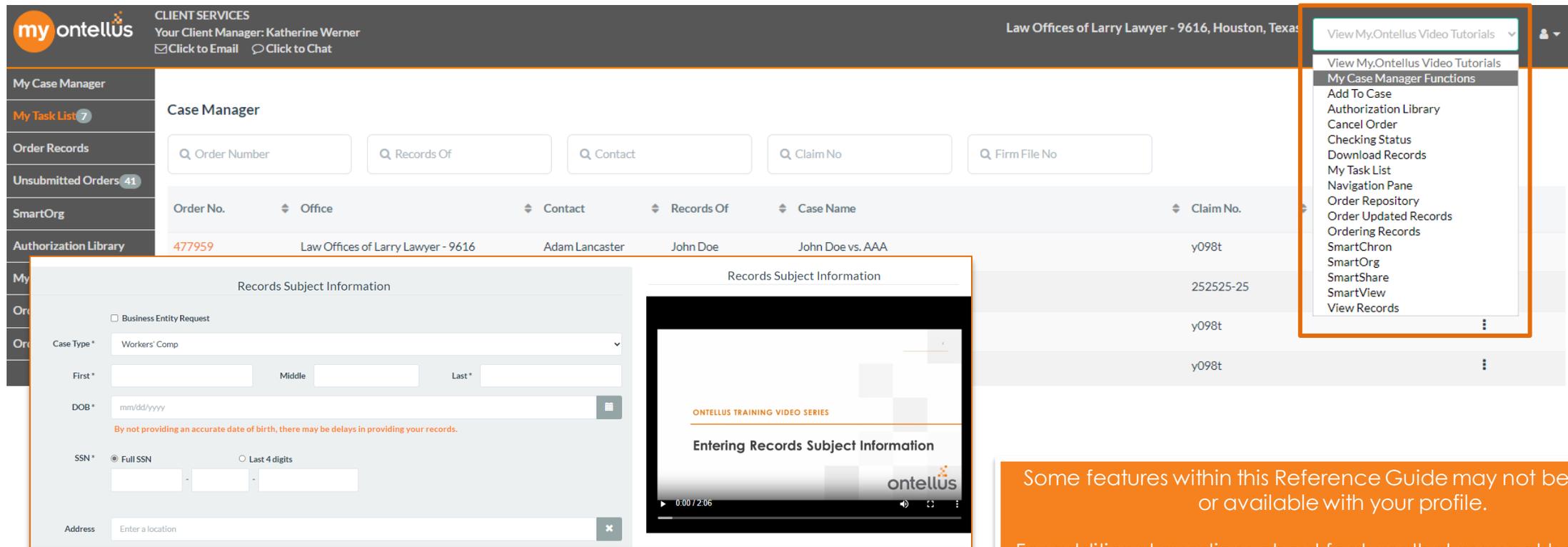
Some features within this Reference Guide may not be enabled or available with your profile.

For additional questions about features that may not be included within your account, please contact your Account Manager.

# About this Reference Guide and Video Tutorials

This Reference Guide demonstrates the use of the My.Ontellus portal.

My.Ontellus video tutorials are available on demand within My.Ontellus and are located at the top right of the screen!. Video tutorials do appear on every page with the first video listed pertaining to the screen you are currently viewing if available.



The screenshot displays the My.Ontellus portal interface. At the top, the header includes the 'my ontellus' logo, 'CLIENT SERVICES', 'Your Client Manager: Katherine Werner', and contact options for email and chat. The user's location is identified as 'Law Offices of Larry Lawyer - 9616, Houston, Texas'. A navigation menu on the left lists various functions like 'My Case Manager', 'My Task List', 'Order Records', and 'SmartOrg'. The main content area features a 'Case Manager' section with search filters for 'Order Number', 'Records Of', 'Contact', 'Claim No', and 'Firm File No'. Below this is a table of records with columns for 'Order No.', 'Office', 'Contact', 'Records Of', 'Case Name', and 'Claim No.'. A video player is overlaid on the table, showing a tutorial titled 'Entering Records Subject Information'. A dropdown menu is open in the top right corner, listing 'View My.Ontellus Video Tutorials' and 'My Case Manager Functions'.

Order No.	Office	Contact	Records Of	Case Name	Claim No.
477959	Law Offices of Larry Lawyer - 9616	Adam Lancaster	John Doe	John Doe vs. AAA	y098t
					252525-25
					y098t
					y098t

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MY.ONTELLUS PORTAL

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**Fast, Smart, Secure, Online**, My.Ontellus easily allows you to:

- Request Records
- View Status Updates and Tracking details
- Download Records
- Upload and Share Documents

### **Simple & Intuitive:**

- The My.Ontellus design and workflow is simple and intuitive. Ontellus customers realize the benefits of using a portal like My.Ontellus to manage their cases and documents.
  - Access 24/7 to review, download or distribute to interested parties
  - A secure, centralized repository of case documents, organized for increased efficiency and reduced costs
  - Upload records you have already obtained to be organized
  - Order an expert witness
  - Request a medical canvass

# My.Ontellus – Secure Ordering/View Portal

## Getting Started



1. To begin, navigate to [www.ontellus.com](https://www.ontellus.com).
2. Click **“Login”** in the upper right-hand corner of the screen.
3. Enter your login credentials and click **“Login”**.
4. Bookmark or save the Portal Login Page as a Favorite for ease of access.

**IMPORTANT - Portal Credentials:**

Ontellus will send each user two separate Emails for security purposes.

- First Email: Contains username
- Second Email: Contains instructions for your first login

MY.ONTELLUS PORTAL

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# Navigation Pane /Menu Tree & My Case Manager Home Page

# My.Ontellus – Secure Ordering/View Portal

## Navigation Pane / Menu Tree



The screenshot shows the My.Ontellus portal interface. On the left is a navigation pane with the following items: My Case Manager, My Task List (7), Order Records, Unsubmitted Orders (41), SmartOrg, Authorization Library, My Experts, Order Medical Canvass, and Order Expert Witness. The top header contains the My.Ontellus logo, CLIENT SERVICES, Your Client Manager: Katherine Werner, Click to Email, Click to Chat, Law Offices of Larry Lawyer - 9616, Houston, Texas, View My.Ontellus Video Tutorials, and a profile icon. A 'Logout' button is circled in orange in the top right. Three callout boxes provide instructions: one for the client manager name, one for the navigation pane, and one for the profile icon.

**CLIENT SERVICES**  
Your Client Manager: Katherine Werner  
Click to Email Click to Chat

Law Offices of Larry Lawyer - 9616, Houston, Texas View My.Ontellus Video Tutorials

Logout

Click on the "Profile Icon" to Logout.

Your Client Service Specialist's Name will appear here. Use the "Click to Email" to email directly. "Click to Chat" to chat with an operator.

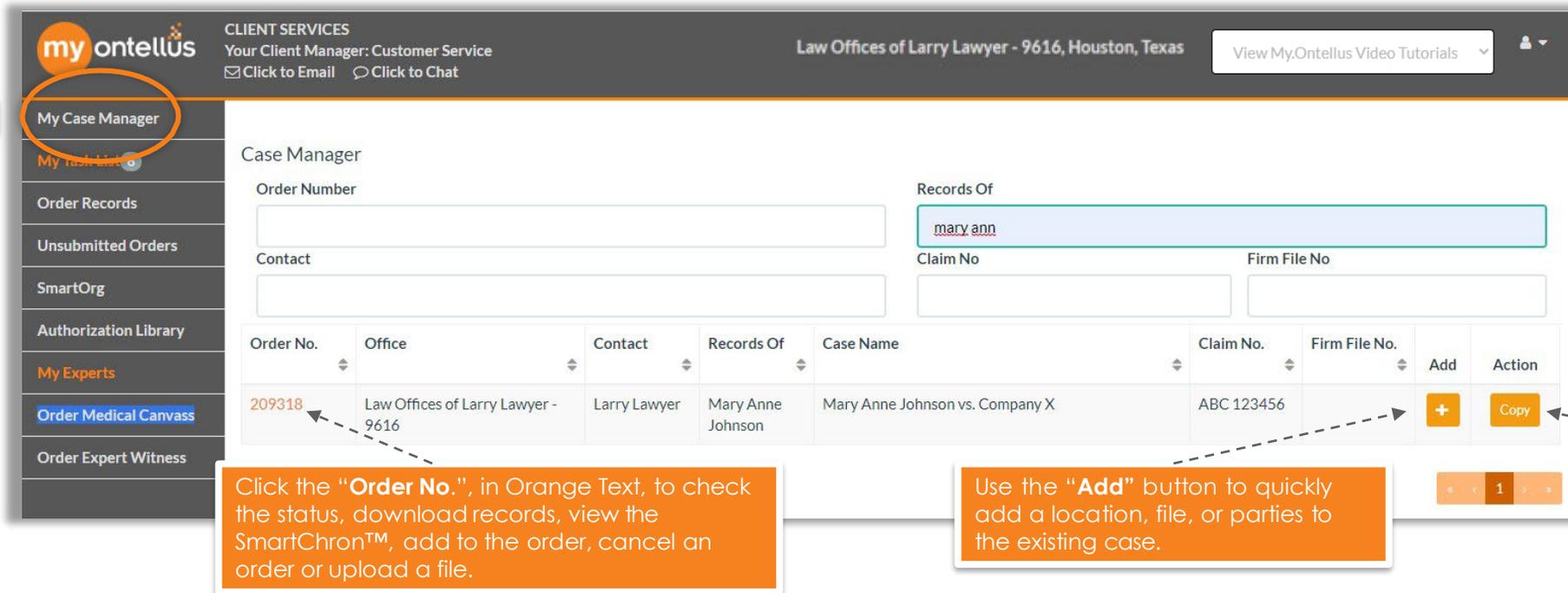
The Navigation Pane / Menu Tree on the left will allow you to see specific areas of the My.Ontellus Portal.

Some features within this Reference Guide may not be enabled or available with your profile.

For additional questions about features that may not be included within your account, please contact your Account Manager.

The “**My Case Manager**” is the home screen that is a comprehensive view of all your cases or claims in the My.Ontellus™ Portal.

1. In the “**My Case Manager**” tab, locate your order.
  - Search and view your cases by Order Number, Records Of, Claim Number or Firm File Number to more easily locate your order.



The screenshot shows the My Case Manager interface. The top navigation bar includes the My.Ontellus logo, client services information, and a search dropdown. The left sidebar contains navigation options, with 'My Case Manager' highlighted. The main content area features search filters for Order Number, Contact, Records Of (with 'mary ann' entered), Claim No, and Firm File No. Below the filters is a table of cases. Annotations with arrows point to the 'Order No.' column, the 'Add' button, and the 'Copy' button.

Order No.	Office	Contact	Records Of	Case Name	Claim No.	Firm File No.	Add	Action
209318	Law Offices of Larry Lawyer - 9616	Larry Lawyer	Mary Anne Johnson	Mary Anne Johnson vs. Company X	ABC 123456		+	Copy

Click the “**Order No.**”, in Orange Text, to check the status, download records, view the SmartChron™, add to the order, cancel an order or upload a file.

Use the “**Add**” button to quickly add a location, file, or parties to the existing case.

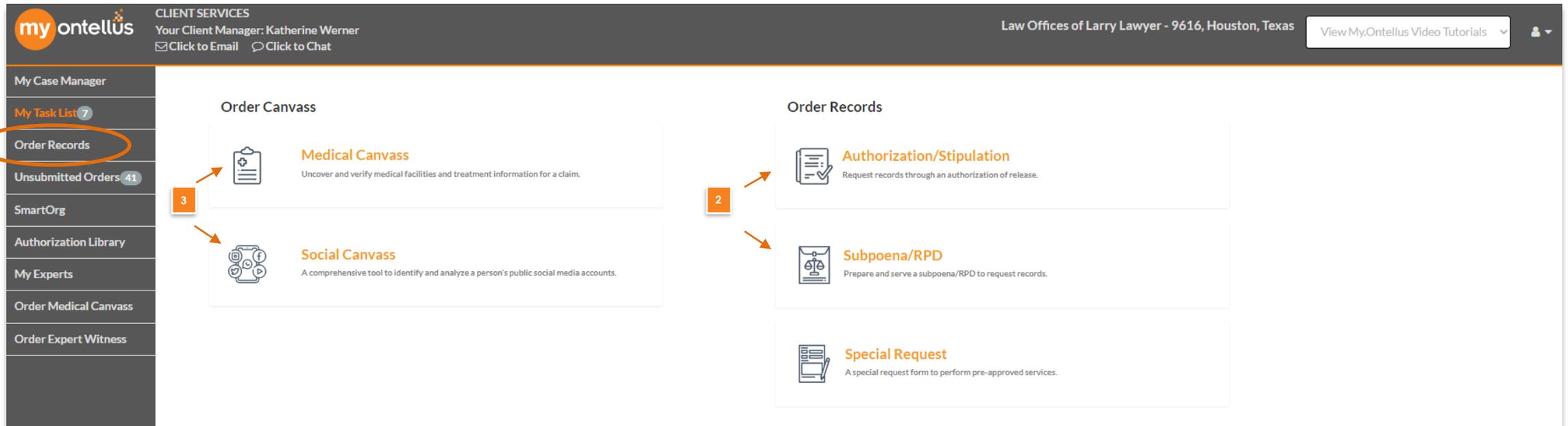
Use the “**Copy**” button to copy the shell of this order and place a new one.

**EASY. FAST. EFFICIENT**

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# Online Ordering

1. To start a new record retrieval order, click “**Order Records**”. This is where the order form is located.
2. Click “**Authorization**” or “**Subpoena**” to begin the order.
3. If you would like to request a Medical or Social Canvass to determine when or where a patient may have received treatment or identify a person’s public social media accounts, click “**Medical Canvass**” or “**Social Canvass**”.



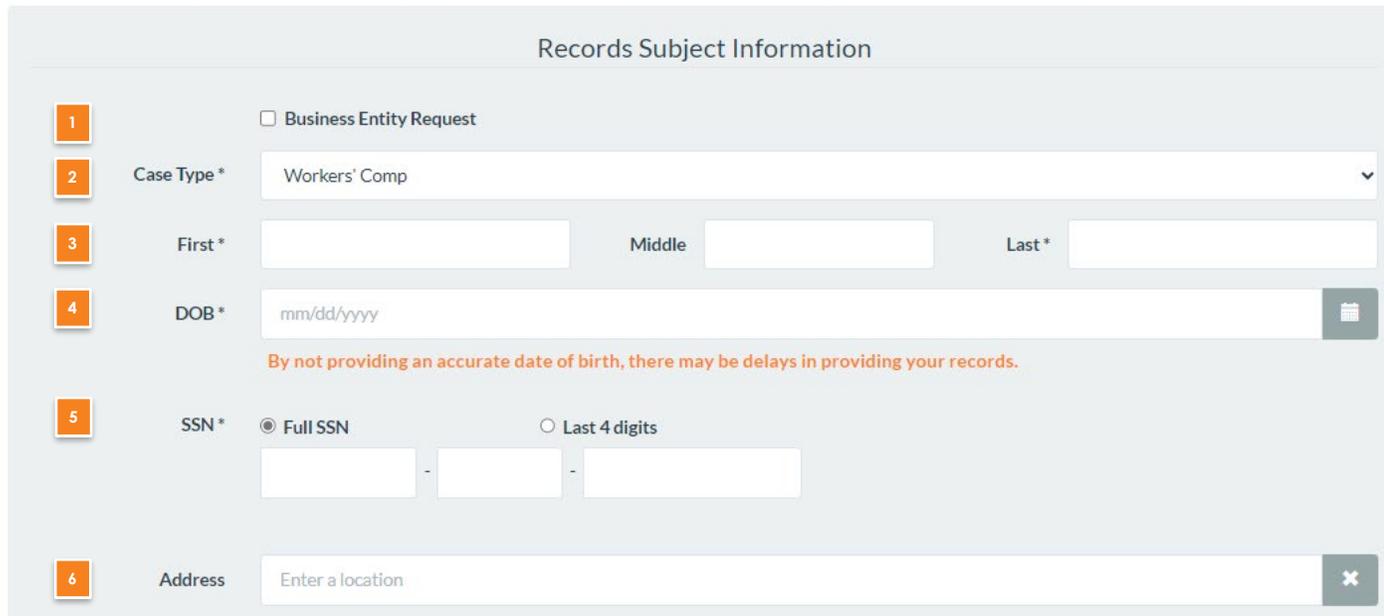
The screenshot displays the myontellus client services interface. The top navigation bar includes the myontellus logo, client services information (Your Client Manager: Katherine Werner), and contact options (Click to Email, Click to Chat). The right side of the header shows the user's location (Law Offices of Larry Lawyer - 9616, Houston, Texas) and a link to video tutorials. The left sidebar contains a navigation menu with items like My Case Manager, My Task List (7), Order Records (circled with a '1'), Unsubmitted Orders (41), SmartOrg, Authorization Library, My Experts, Order Medical Canvass, and Order Expert Witness. The main content area is divided into two sections: 'Order Canvass' and 'Order Records'. The 'Order Canvass' section includes 'Medical Canvass' (Uncover and verify medical facilities and treatment information for a claim.) and 'Social Canvass' (A comprehensive tool to identify and analyze a person's public social media accounts.). The 'Order Records' section includes 'Authorization/Stipulation' (Request records through an authorization of release.), 'Subpoena/RPD' (Prepare and serve a subpoena/RPD to request records.), and 'Special Request' (A special request form to perform pre-approved services.). Arrows and numbers indicate the steps: '1' points to the 'Order Records' menu item, '2' points to the 'Authorization/Stipulation' and 'Subpoena/RPD' options, and '3' points to the 'Medical Canvass' and 'Social Canvass' options.

# Ordering Records - Authorization

## Records Subject Information

Complete applicable fields for the Records Subject (Patient) Information.

Fields with **an asterisk (\*)** are required.



The screenshot shows a web form titled "Records Subject Information". It contains several fields and options:

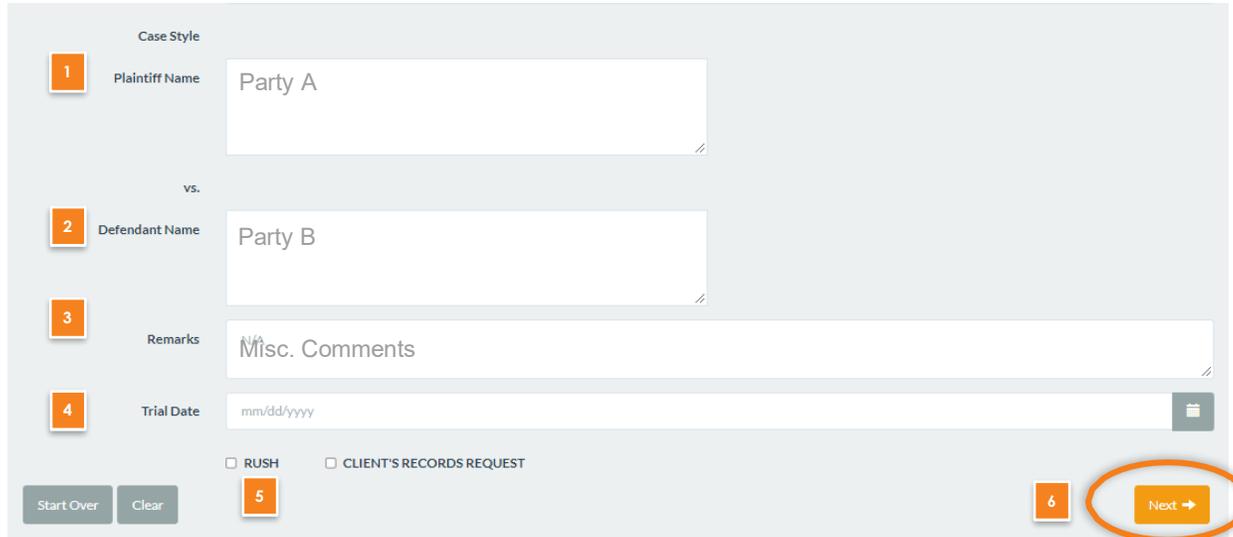
- 1**: A checkbox labeled "Business Entity Request".
- 2**: A dropdown menu labeled "Case Type\*" with "Workers' Comp" selected.
- 3**: Three text input fields for "First\*", "Middle", and "Last\*" names.
- 4**: A date input field labeled "DOB\*" with a placeholder "mm/dd/yyyy" and a calendar icon.
- 5**: Radio buttons for "SSN\*" selection, with "Full SSN" selected. Below are three text input fields for the SSN digits.
- 6**: A text input field labeled "Address" with a placeholder "Enter a location" and a clear button (X).

A warning message is displayed below the DOB field: "By not providing an accurate date of birth, there may be delays in providing your records."

1. Select "**Business Records Request**" to indicate as such.
2. Select "**Case Type**" from the drop-down menu.
3. Enter the **Subject's Name**
  - Should include the full legal name of the person or business you are requesting records for.
4. Enter the **DOB**
  - Use calendar icon to enter dates or type into a format of xx/xx/xxxx.
5. Enter the **SSN**
  - Select the appropriate option of entering either **Full SSN** or the **Last 4 digits**.
6. Begin typing the **State** where the subject resides and select the pre-filled match.

# Ordering Records - Authorization

## Case Information



The screenshot shows a web form for entering case information. It includes the following fields and controls:

- 1** Plaintiff Name: A text input field containing "Party A".
- 2** Defendant Name: A text input field containing "Party B".
- 3** Remarks: A large text area containing "Misc. Comments".
- 4** Trial Date: A date input field with a calendar icon, containing "mm/dd/yyyy".
- 5** Checkboxes: Two checkboxes labeled "RUSH" and "CLIENT'S RECORDS REQUEST", both currently unchecked.
- 6** Next button: An orange button with the text "Next" and a right-pointing arrow, circled in orange.
- Other controls: "Start Over" and "Clear" buttons are located at the bottom left.

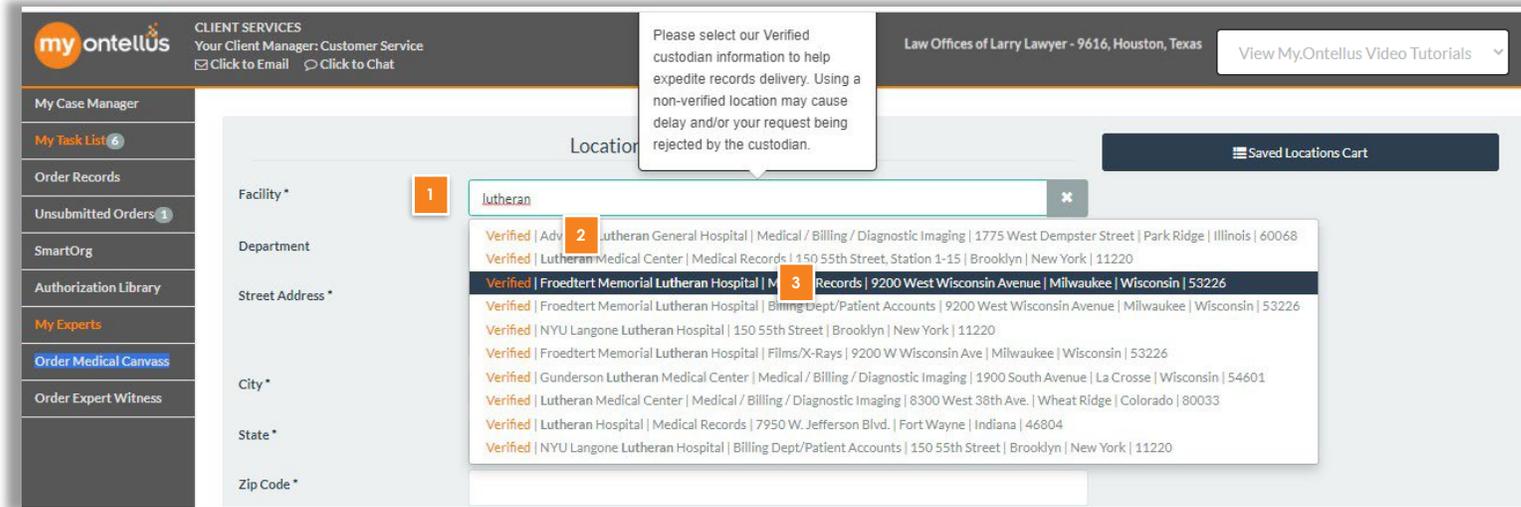
Complete the *Case Style* fields.

1. Enter the Plaintiff Name.
2. Enter the Defendant Name.
3. The **“Remarks”** box is a text-free area to share any notes pertinent to this case.
  - Remarks will be shared with our Order Team to help instruct them on specifics of the request.
4. If you have a trial, mediation, or deposition, date enter the information in the **“Trial Date”** field. This field is not required.
5. \*To expedite an order, click the **“Rush”** checkbox.
6. Click **“Next”** to continue.

\*A RUSH request is defined as a request that needs expedited service throughout each part of the retrieval process, versus a standard order, due to time restraints or specific deadlines. When an order is placed on a RUSH, it is routed through a RUSH queue that is handled by a specific RUSH team, whose main focus is to make forward progress with the RUSH requests and to drive records in-house in an expedited fashion.

# Ordering Records - Authorization

## Location Information



CLIENT SERVICES  
Your Client Manager: Customer Service  
Click to Email Click to Chat

Please select our Verified custodian information to help expedite records delivery. Using a non-verified location may cause delay and/or your request being rejected by the custodian.

Law Offices of Larry Lawyer - 9616, Houston, Texas View My.Ontellus Video Tutorials

Location

My Case Manager  
My Task List 6  
Order Records  
Unsubmitted Orders 1  
SmartOrg  
Authorization Library  
My Experts  
Order Medical Canvass  
Order Expert Witness

Facility\* 1 lutheran

Department 2

Street Address\* 3

City\*

State\*

Zip Code\*

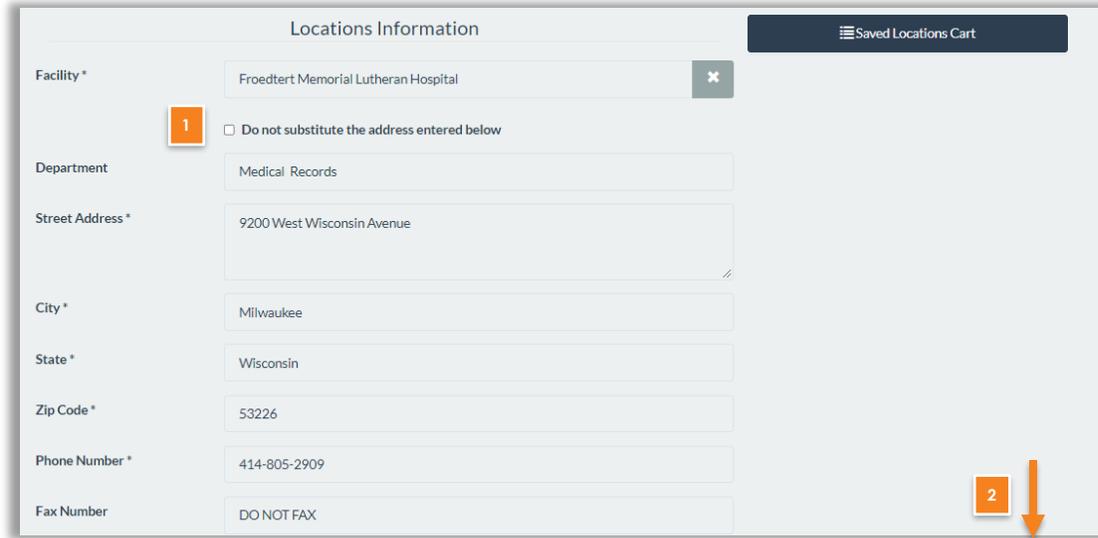
Verified | Adv Lutheran General Hospital | Medical / Billing / Diagnostic Imaging | 1775 West Dempster Street | Park Ridge | Illinois | 60068  
Verified | Lutheran Medical Center | Medical Records | 150 55th Street, Station 1-15 | Brooklyn | New York | 11220  
Verified | Froedtert Memorial Lutheran Hospital | Medical Records | 9200 West Wisconsin Avenue | Milwaukee | Wisconsin | 53226  
Verified | Froedtert Memorial Lutheran Hospital | Billing Dept/Patient Accounts | 9200 West Wisconsin Avenue | Milwaukee | Wisconsin | 53226  
Verified | NYU Langone Lutheran Hospital | 150 55th Street | Brooklyn | New York | 11220  
Verified | Froedtert Memorial Lutheran Hospital | Films/X-Rays | 9200 W Wisconsin Ave | Milwaukee | Wisconsin | 53226  
Verified | Gunderson Lutheran Medical Center | Medical / Billing / Diagnostic Imaging | 1900 South Avenue | La Crosse | Wisconsin | 54601  
Verified | Lutheran Medical Center | Medical / Billing / Diagnostic Imaging | 8300 West 38th Ave. | Wheat Ridge | Colorado | 80033  
Verified | Lutheran Hospital | Medical Records | 7950 W. Jefferson Blvd. | Fort Wayne | Indiana | 46804  
Verified | NYU Langone Lutheran Hospital | Billing Dept/Patient Accounts | 150 55th Street | Brooklyn | New York | 11220

Saved Locations Cart

1. To enter the location from which you would like records from, begin typing the facility name on the Locations Information Page.
2. As you type, a search will be preformed within our database for matching verified providers.
  - The Ontellus portal houses a robust database of verified provider/custodian locations nationwide. With hundreds of thousands of locations stored in the database, Ontellus ensures the request is sent to the correct custodian which is a prerequisite for timely follow up and production of records. To narrow a search, continue typing.
3. Click on the location that matches what you are looking for.
  - Selecting the correct location will help in retrieving records within a timely manner.
  - If a verified match is selected, the remaining fields will auto-populate.
  - If there are no matching facilities, you will need to fill in the required fields.

# Ordering Records - Authorization

## Location Information



Locations Information Saved Locations Cart

Facility \* Froedtert Memorial Lutheran Hospital ✕

Do not substitute the address entered below

Department Medical Records

Street Address \* 9200 West Wisconsin Avenue

City \* Milwaukee

State \* Wisconsin

Zip Code \* 53226

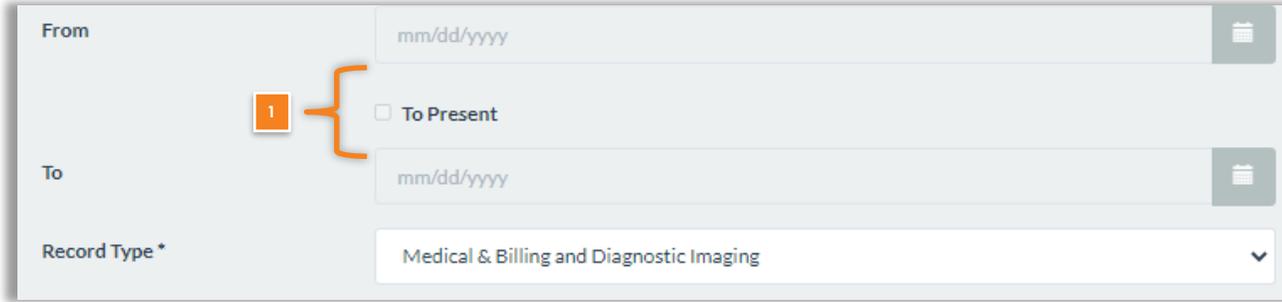
Phone Number \* 414-805-2909

Fax Number DO NOT FAX

1. Select “**Do not substitute the address entered below**” if entering your own address that is not within our verified database of facilities.
2. Type the “**State**” and select from the pre-filled match.
3. Scroll down to complete the remaining sections.

# Ordering Records - Authorization

## Location Scope



From: mm/dd/yyyy

To Present

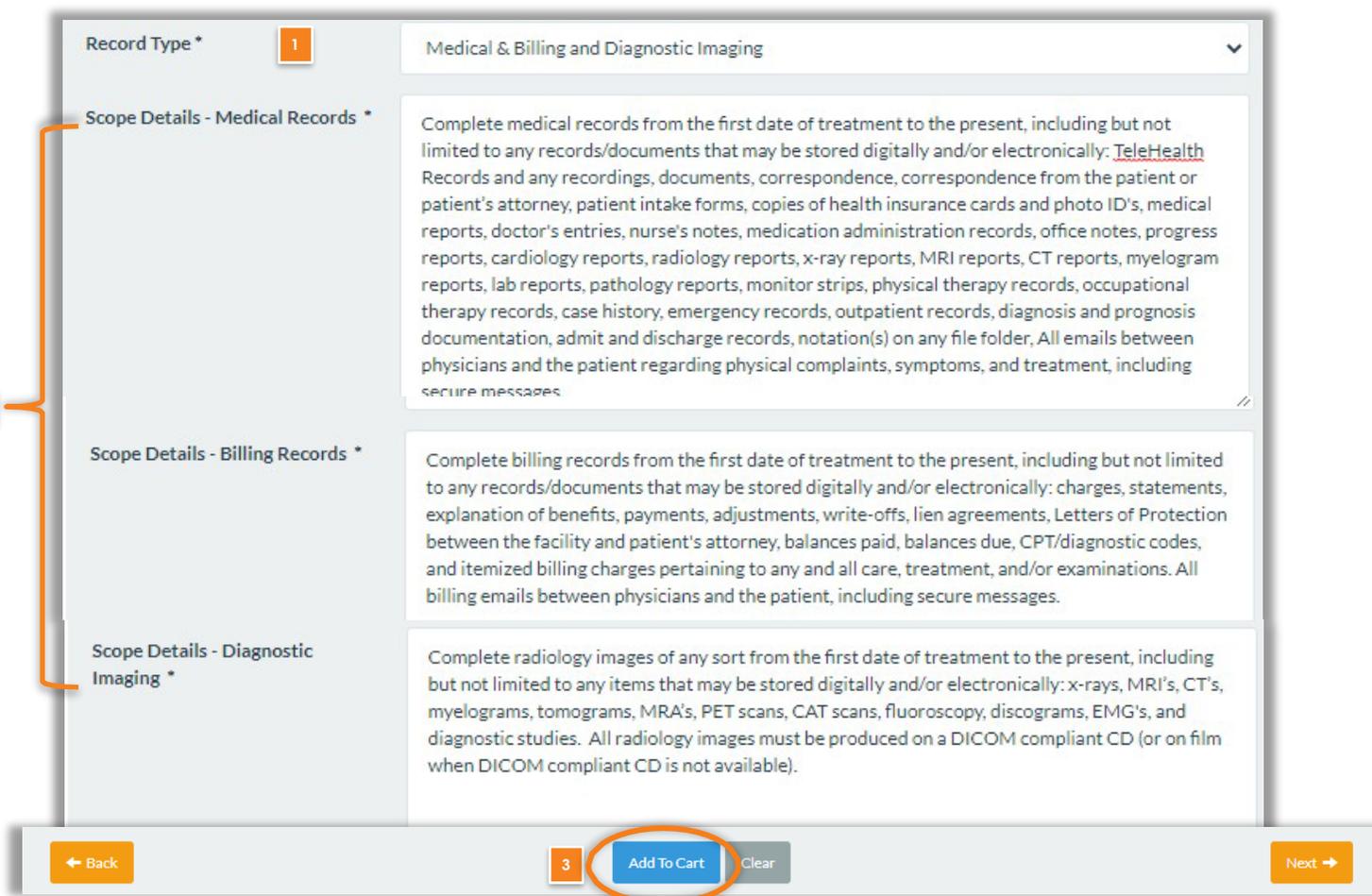
To: mm/dd/yyyy

Record Type \*: Medical & Billing and Diagnostic Imaging

1. Enter the date range that you are requesting records from. (Ex: Date of Loss to Present); or, if you would like the facility to produce all records for that patient, check the box to the left of “**Any and all records**”.

# Ordering Records - Authorization

## Location Scope



Record Type \* 1 Medical & Billing and Diagnostic Imaging

Scope Details - Medical Records \*  
Complete medical records from the first date of treatment to the present, including but not limited to any records/documents that may be stored digitally and/or electronically: TeleHealth Records and any recordings, documents, correspondence, correspondence from the patient or patient's attorney, patient intake forms, copies of health insurance cards and photo ID's, medical reports, doctor's entries, nurse's notes, medication administration records, office notes, progress reports, cardiology reports, radiology reports, x-ray reports, MRI reports, CT reports, myelogram reports, lab reports, pathology reports, monitor strips, physical therapy records, occupational therapy records, case history, emergency records, outpatient records, diagnosis and prognosis documentation, admit and discharge records, notation(s) on any file folder, All emails between physicians and the patient regarding physical complaints, symptoms, and treatment, including secure messages

Scope Details - Billing Records \*  
Complete billing records from the first date of treatment to the present, including but not limited to any records/documents that may be stored digitally and/or electronically: charges, statements, explanation of benefits, payments, adjustments, write-offs, lien agreements, Letters of Protection between the facility and patient's attorney, balances paid, balances due, CPT/diagnostic codes, and itemized billing charges pertaining to any and all care, treatment, and/or examinations. All billing emails between physicians and the patient, including secure messages.

Scope Details - Diagnostic Imaging \*  
Complete radiology images of any sort from the first date of treatment to the present, including but not limited to any items that may be stored digitally and/or electronically: x-rays, MRI's, CT's, myelograms, tomograms, MRAs, PET scans, CAT scans, fluoroscopy, discograms, EMG's, and diagnostic studies. All radiology images must be produced on a DICOM compliant CD (or on film when DICOM compliant CD is not available).

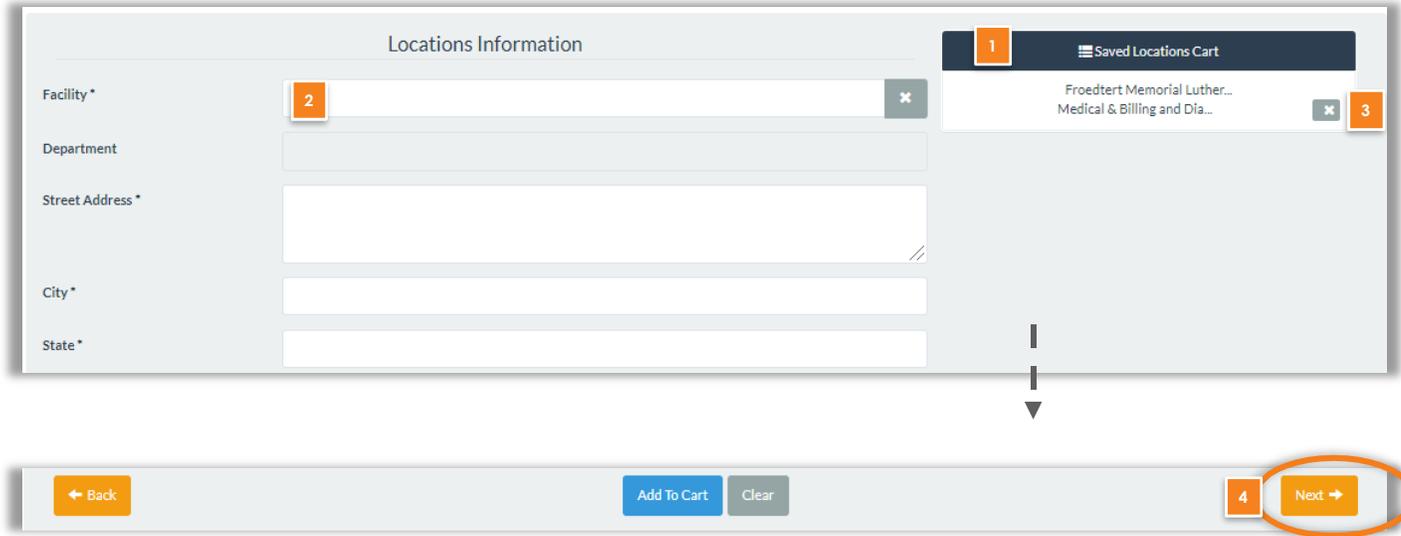
← Back 3 Add To Cart Clear Next →

1. Select the “**Record Type**” for the location from the dropdown. This is required for every order.
2. The Scope Details section will auto-populate, broken out by each Record Type. These details will appear on the request to the custodian.
  - *Did You Know?* You can update/edit the Scope Details by highlighting the text and deleting verbiage and adding your own verbiage.
3. **Click “Add to Cart”** to save the location.

\* A **Record Type** request for diagnostic imaging will produce any and/all or the specified date range of films from the provider. A Film Breakdown/Imaging Inventory is a request for the provider to, (instead of producing ALL of the films within the scope of the request) provide a list/inventory of all films they have on file for that patient. The imaging inventory then allows the user/requestor to pick and choose the films they would like the provider to produce from the inventory/breakdown list.

# Ordering Records - Authorization

## Saved Locations



The screenshot shows a web interface for adding locations. On the left, the 'Locations Information' form has fields for Facility\*, Department, Street Address\*, City\*, and State\*. A red box with the number '2' highlights the Facility\* field. On the right, the 'Saved Locations Cart' contains one item: 'Froedtert Memorial Luther... Medical & Billing and Dia...'. A red box with the number '3' highlights the 'X' button next to this item. A vertical dashed arrow points from the cart area down to the 'Next' button at the bottom of the screen, which is circled in red and has a red box with the number '4' next to it. Other buttons at the bottom include 'Back', 'Add To Cart', and 'Clear'.

1. The saved facility will appear on the right-hand side of the screen.
2. Repeat the process to continue to add locations that you are requesting records from.
3. To remove a location, click the “X”.
4. Once the final location is added to the cart, click “**Next**” at the bottom of the screen.

# Ordering Records- Authorization

## Entering Opposing and Co-Counsel

Parties To Be Noticed  
(Not the Ordering Party/Firm)

Click To Skip

Counsel Type \*

- Applicant
- Claimant
- Defendant
- Employer / Carrier
- Intervenor
- Petitioner
- Plaintiff
- Respondent

Name of Party Representing \*

Firm Name \*

Address \*

City \*

State \*

Zip Code \*

Phone \*

Fax

Attorney Name \*

Attorney Email \*

E-Serve Email  
email@primary.com,email@secondary.com

Plaintiff's Atty

Send ordered records to this party at my expense  Yes  No

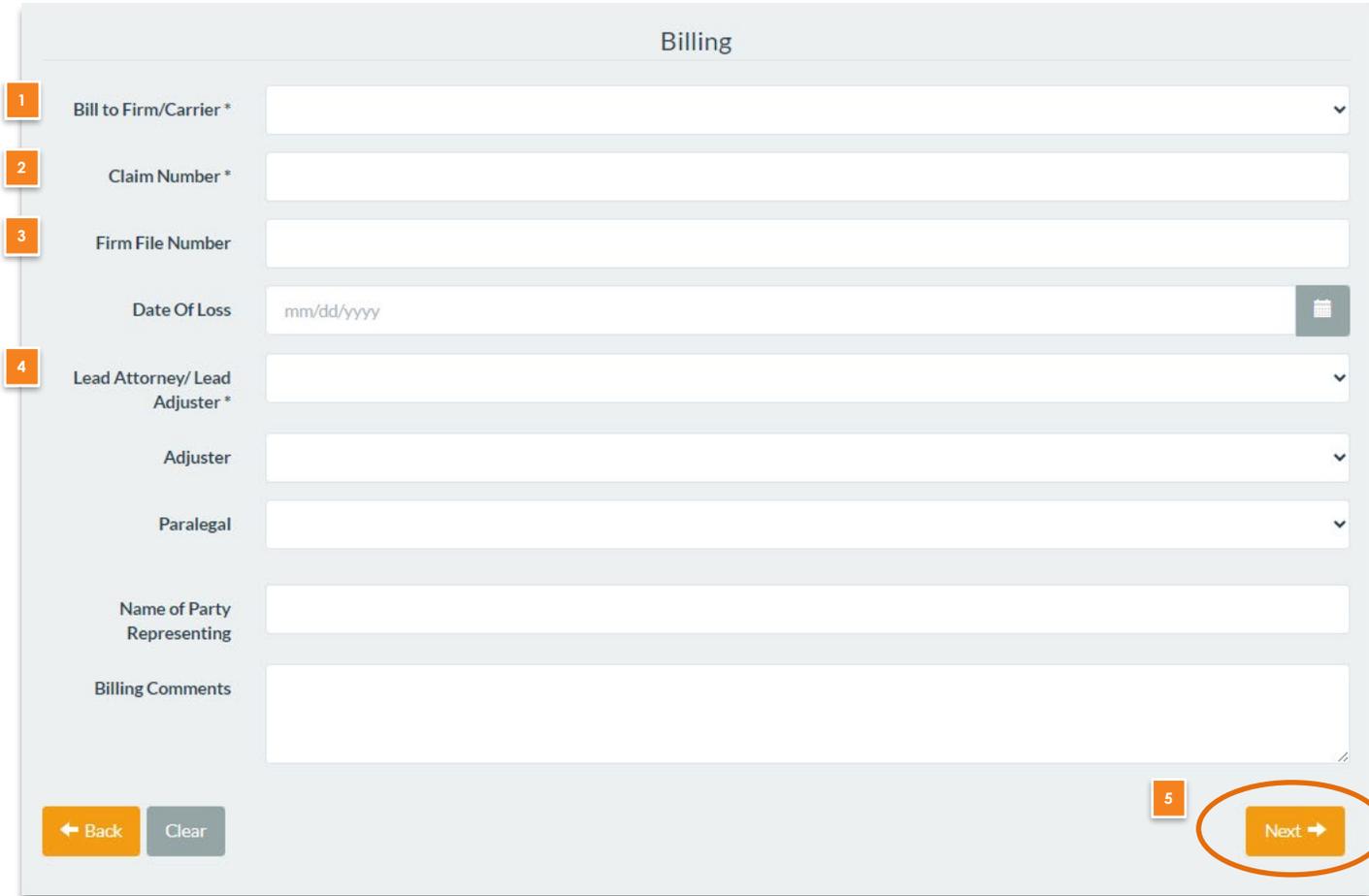
Records On-Line  Records On Paper  Records On CD  Films On CD

← Back Add To Cart Clear Next →

- Complete the Parties To Be Noticed if you would like to send notice to Opposing Counsel on your Authorization order.
  - This is not required**, however, if applicable in your state, for requests by authorization; complete the information on this page, otherwise select **“Click to Skip”** button.
  - If completing this page, type the **“State”** and select from the pre-filled match.

# Ordering Records - Authorization

## Billing



Billing

1 Bill to Firm/Carrier \*

2 Claim Number \*

3 Firm File Number

Date Of Loss mm/dd/yyyy

4 Lead Attorney/ Lead Adjuster \*

Adjuster

Paralegal

Name of Party Representing

Billing Comments

← Back Clear

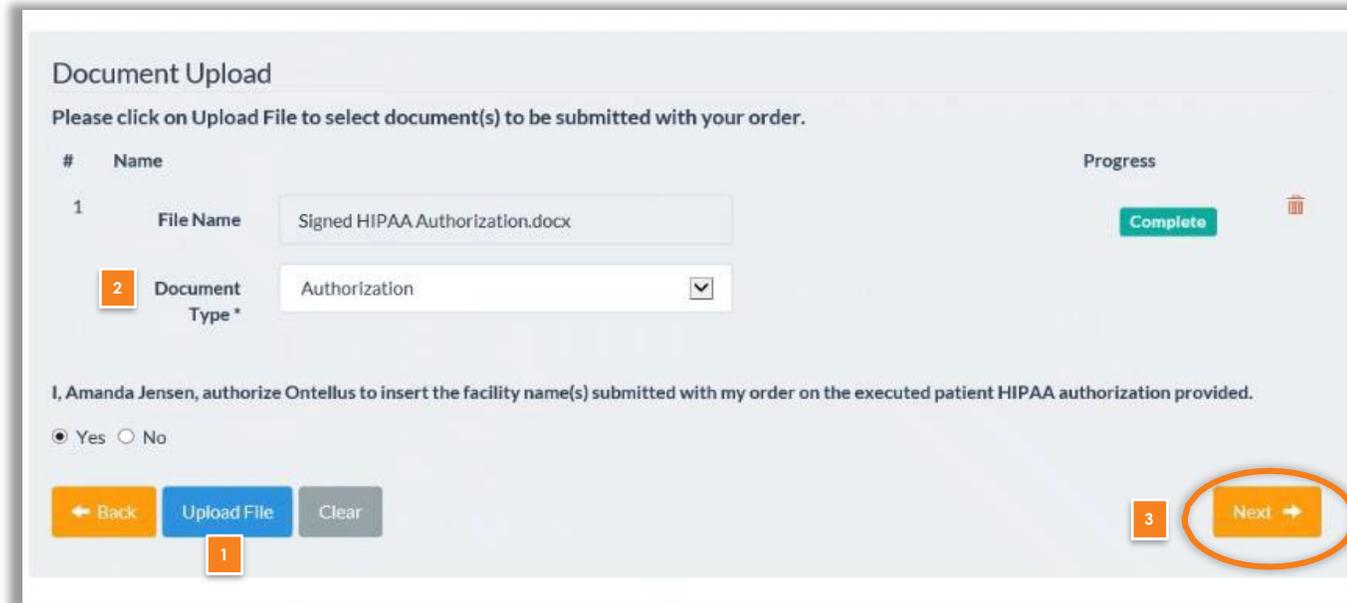
5 Next →

Complete the Billing Information.

1. **"Bill to Firm/Carrier"** name can be selected from the dropdown.
  - Select the insurance carrier to be billed for this case.
  - If you would like to add a carrier to your list of options, please contact your Account Manager or Client Service Specialist to discuss.
2. **"Claim Number"** is required.
  - It's suggested to copy & paste the Claim Number to ensure accurate entry and for invoicing purposes.
3. **"Firm File Number"** enables you to enter a number that is specific to their firm so orders can be easily searched in the My.Ontellus portal.
4. Select the **"Lead Attorney"** or main contact ordering on the case/claim. If your attorney is not listed in the dropdown menu, contact your Client Service Specialist to have them added.
5. Click **"Next"** to continue.

# Ordering Records - Authorization

## Document Upload



**Document Upload**

Please click on Upload File to select document(s) to be submitted with your order.

#	Name	Progress
1	File Name: Signed HIPAA Authorization.docx	Complete 

2 Document Type\*: Authorization

I, Amanda Jensen, authorize Ontellus to insert the facility name(s) submitted with my order on the executed patient HIPAA authorization provided.

Yes  No

1    3

1. Click **“Upload File”** to select a file to attach to the order. This is just like attaching a file to an email.
2. Select the **“Document Type”** from the dropdown.
  - Select **“Upload File”** again to attach additional files.

\*Select the Trash Can icon to delete a file.

\*Ontellus will insert the facility name on the executed HIPAA authorization if a generic one is uploaded. This is the **only** information Ontellus will insert on an Authorization.

- If you would not like Ontellus to add this information, Select **“No”**.

3. Click **“Next”** to review your order before submitting.

**IMPORTANT:** Ontellus requires a Signed Authorization to be uploaded to the order prior to processing the request. If you do not add an Authorization on this screen, you will not be able to click “Next” until one is provided.

# Ordering Review - Authorization

## Review Before Submission



**Confirm Order Information**

Please review the information below for completeness & accuracy.  
Revisions after submission may result in order delay & additional charges.

<u>Records Subject Information:</u>	
Business Records:	No
Case Type:	Civil
Subject Name:	
DOB:	02/01/1958
SSN:	***-**-6789
Address:	Mary Anne Johnson
City:	
State:	Illinois
Zip Code:	
Case Style:	vs
Remarks:	
Trial Date:	
Rush:	No
Client Record Request:	No
<u>Locations Information:</u>	
Facility Name:	Advocate Lutheran General Hospital
Department:	Medical / Billing / Diagnostic Imaging
Street Address:	1775 West Dempster Street
City:	Park Ridge
State:	Illinois
Zip Code:	60068

← BackThe Ontellus [Privacy Policy](#) and [Terms & Conditions](#) applySubmit Order

Review the information entered on the order for accuracy.

You will notice that if you entered an SSN, Full or Partial, the Order Confirmation page only shows the last 4 digits for privacy and confidentiality purposes.

- Select “ ← **Back**” to make any changes on any previous screens.
- Scroll down to the bottom of the page to click “**Submit Order**”.

**IMPORTANT:** Once you click “Submit Order” you cannot go back on the portal and make any changes to the order. Please contact your Customer Client Specialist to make changes.

# Confirmation Email



1

## COMPLETE

Order Submission Complete!  
Thank you for submitting your order. To review or print your Order Confirmation and/or case document(s), please visit your [Case Repository](#). To continue ordering, please visit the [Order Records](#) page.

[Click here to Copy Order](#)

2



## Thank You for Your Order!

Order Confirmation  
Re: John Doe  
Claim No. 123456789-01  
Order No. 368191

Hello Larry Lawyer ,

Thank you for ordering with us.

### ORDER LOCATIONS:

1. Advocate Lutheran General Hospital , 1775 West Dempster Street , Park Ridge , Illinois , 60068
2. Rush Copley Medical Center , 2000 Ogden Avenue , Aurora , Illinois , 60504

To view the details of your order, please go to My Case Manager in the Ontellus Client Portal at [secure.ontellus.com](https://secure.ontellus.com).

We will send a records notification email when records are available for download.

If you have any questions, please contact your Client Manager or [customerservice@ontellus.com](mailto:customerservice@ontellus.com).

Have a Great Day,  
Your Ontellus Team

1. A confirmation notification will appear once you've submitted the order.
  2. You will receive a confirmation email shortly after order submission confirming that your order has been placed.
- Ontellus will send a notification email when records are ready for review.
  - Click [here](#) to see how to View Records.

# Ordering Records - Subpoena

## Case Information

Case Information

1 Case Type \*

2 State \*

3 Court Type \*

4 County \*

5 Court Name \*

6 Court Docket No \*

Complete the required Case Information Fields.

Fields with **an asterisk (\*)** are required.

1. Select “**Case Type**” from the drop-down menu.
2. Type the “**State**” and select from the pre-filled match.
3. Type the “**Court Type**” and select from the drop-down menu.
4. Type the “**County**” and select from the pre-filled match.
5. Select the “**Court Name**” from the drop-down menu.
6. Enter the “**Court Docket Number**”.

# Ordering Records - Subpoena

## Case Information

Case Style

1 Plaintiff Name \*

2 Defendant Name \*

vs.

3 Remarks N/A

4 Trial Date mm/dd/yyyy

5 Expedite Request  RUSH

Start Over Clear

6 Next →

Complete the Case Style fields.

1. Enter the **Plaintiff** Name.
2. Enter the **Defendant** Name.
3. The “**Remarks**” box is a text-free area to share any notes pertinent to this case.
  - Remarks will be shared with our Order Team to help instruct them on specifics of the request.
4. If you have a trial date, mediation, or deposition, enter the information in the “**Trial Date**” field. This field is not required.
5. \*To expedite an order, click the “**Rush**” checkbox.
6. Click “**Next**” to continue.

\*A RUSH request is defined as a request that needs expedited service throughout each part of the retrieval process, versus a standard order, due to time restraints or specific deadlines. When an order is placed on a RUSH, it is routed through a RUSH queue that is handled by a specific RUSH team, whose main focus is to make forward progress with the RUSH requests and to drive records in-house in an expedited fashion.

# Ordering Records - Subpoena

## Records Subject Information

Records Subject Information

1  Business Entity Request

2 Records Subject Type \*  
Applicant  
Claimant  
Defendant  
Employer / Carrier  
Intervenor  
Petitioner  
Plaintiff  
Respondent

3 First \* Middle Last \*

4 DOB \* mm/dd/yyyy 

By not providing an accurate date of birth, there may be delays in providing your records.

5 SSN \*  Full SSN  Last 4 digits

Address Enter a location 

City

6 State \*

Zip Code

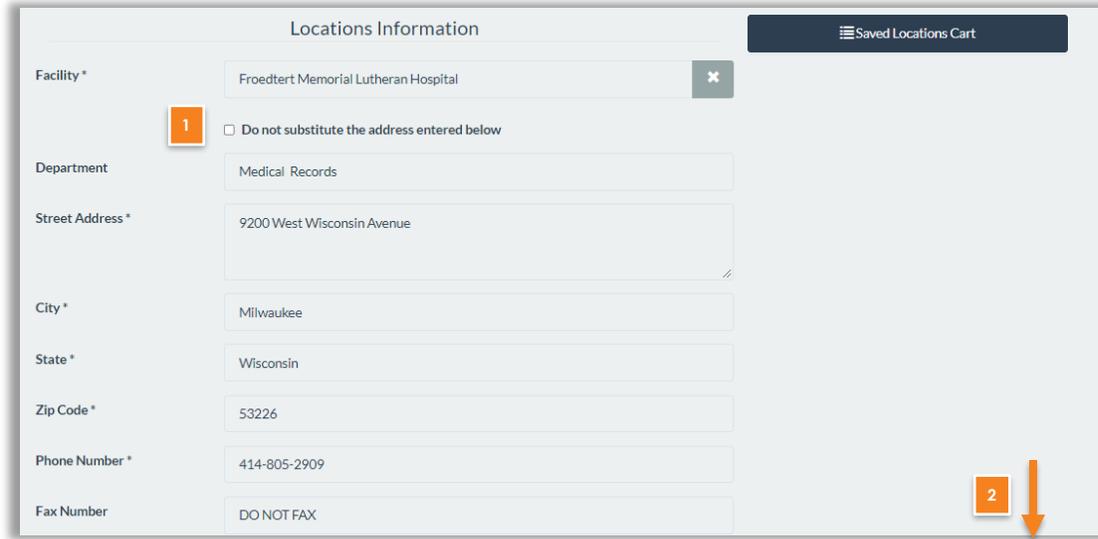
Enter the basic Patient or Record subject Information.

Fields with **an asterisk (\*)** are required.

1. Select **“Business Records Request”** to indicate as such.
2. Select **“Records Subject Type”** from the drop-down menu.
3. Name: patient or record subject name
4. Enter the **DOB**
  - Use calendar icon to enter dates or type into a format of xx/xx/xxxx.
5. Enter the **SSN**
  - Select the appropriate option of entering either **Full SSN** or the **Last 4 digits**.
6. State  
Begin typing the State where the subject resides and select the pre-filled match.
7. Click **“Next”** to proceed.

# Ordering Records - Subpoena

## Location Information



Locations Information Saved Locations Cart

Facility \* Froedtert Memorial Lutheran Hospital ✕

Do not substitute the address entered below

Department Medical Records

Street Address \* 9200 West Wisconsin Avenue

City \* Milwaukee

State \* Wisconsin

Zip Code \* 53226

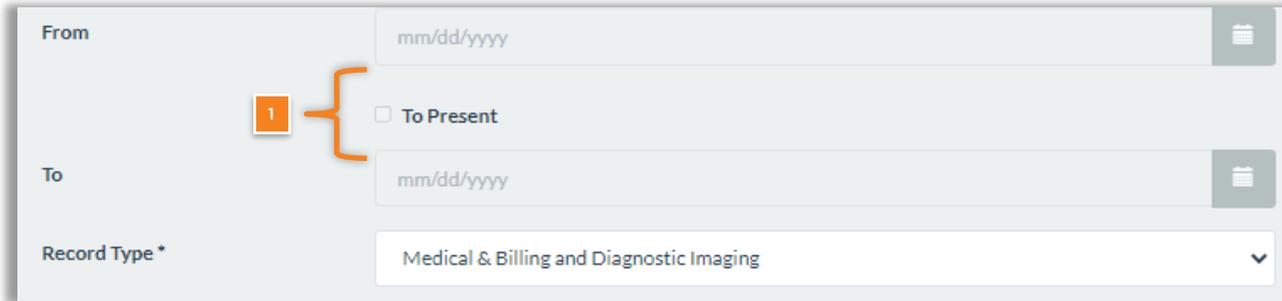
Phone Number \* 414-805-2909

Fax Number DO NOT FAX

1. Select “**Do not substitute the address entered below**” if entering your own address that is not within our verified database of facilities.
2. Type the “**State**” and select from the pre-filled match.
3. Scroll down to complete the remaining sections.

# Ordering Records - Subpoena

## Location Scope



The screenshot shows a form with the following fields:

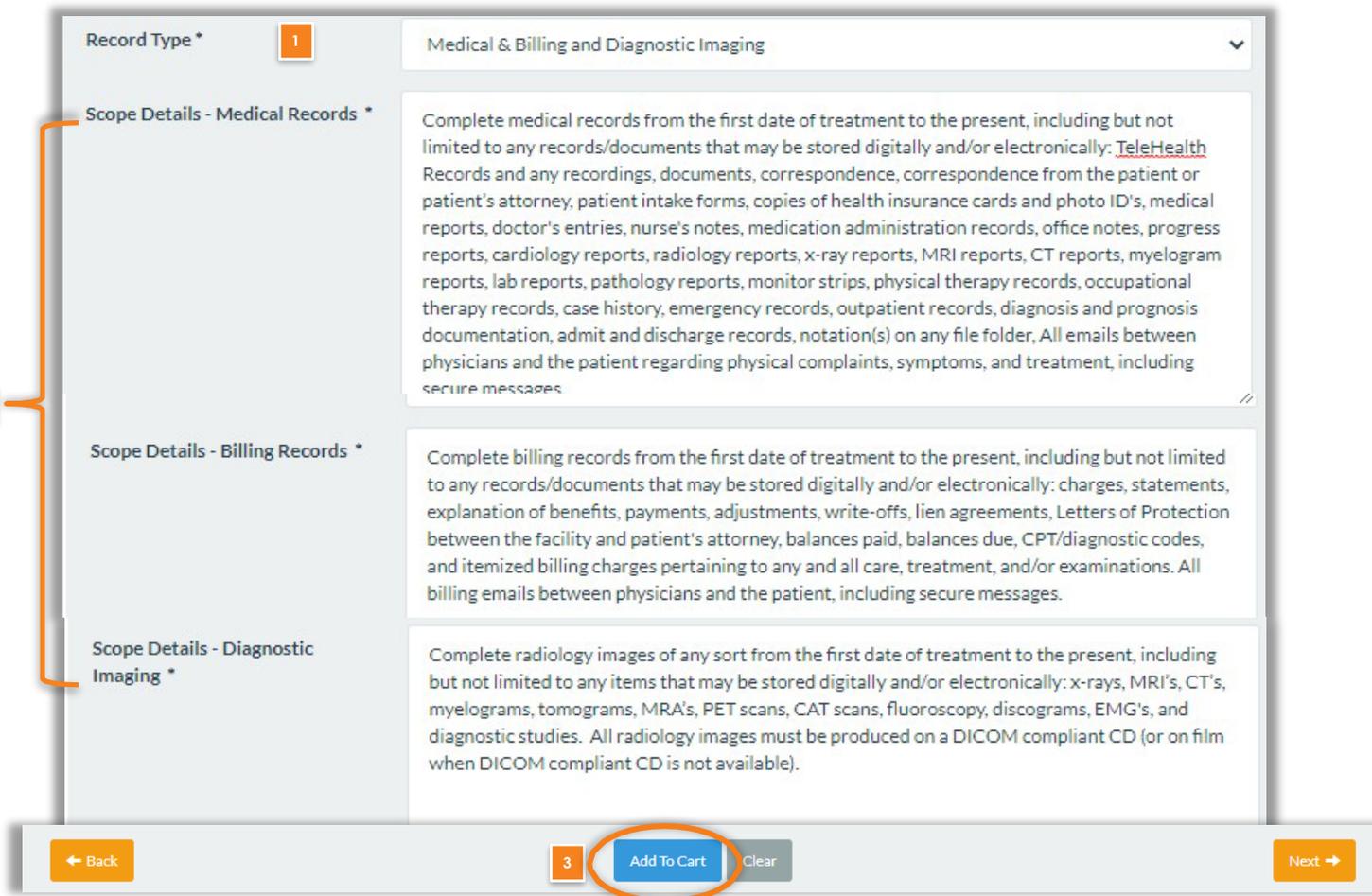
- From:** A date input field with the placeholder text "mm/dd/yyyy" and a calendar icon.
- To:** A date input field with the placeholder text "mm/dd/yyyy" and a calendar icon.
- Record Type\*:** A dropdown menu with the selected option "Medical & Billing and Diagnostic Imaging".

An orange bracket labeled "1" points to the "To Present" checkbox, which is currently unchecked.

1. Enter the date range that you are requesting records from. (Ex: Date of Loss to Present) or, if you would like the facility to produce all records for that patient, check the box to the left of **“Any and all records”**.

# Ordering Records - Subpoena

## Location Scope



Record Type \* 1 Medical & Billing and Diagnostic Imaging

Scope Details - Medical Records \*  
Complete medical records from the first date of treatment to the present, including but not limited to any records/documents that may be stored digitally and/or electronically: [TeleHealth Records](#) and any recordings, documents, correspondence, correspondence from the patient or patient's attorney, patient intake forms, copies of health insurance cards and photo ID's, medical reports, doctor's entries, nurse's notes, medication administration records, office notes, progress reports, cardiology reports, radiology reports, x-ray reports, MRI reports, CT reports, myelogram reports, lab reports, pathology reports, monitor strips, physical therapy records, occupational therapy records, case history, emergency records, outpatient records, diagnosis and prognosis documentation, admit and discharge records, notation(s) on any file folder, All emails between physicians and the patient regarding physical complaints, symptoms, and treatment, including secure messages

Scope Details - Billing Records \*  
Complete billing records from the first date of treatment to the present, including but not limited to any records/documents that may be stored digitally and/or electronically: charges, statements, explanation of benefits, payments, adjustments, write-offs, lien agreements, Letters of Protection between the facility and patient's attorney, balances paid, balances due, CPT/diagnostic codes, and itemized billing charges pertaining to any and all care, treatment, and/or examinations. All billing emails between physicians and the patient, including secure messages.

Scope Details - Diagnostic Imaging \*  
Complete radiology images of any sort from the first date of treatment to the present, including but not limited to any items that may be stored digitally and/or electronically: x-rays, MRI's, CT's, myelograms, tomograms, MRAs, PET scans, CAT scans, fluoroscopy, discograms, EMG's, and diagnostic studies. All radiology images must be produced on a DICOM compliant CD (or on film when DICOM compliant CD is not available).

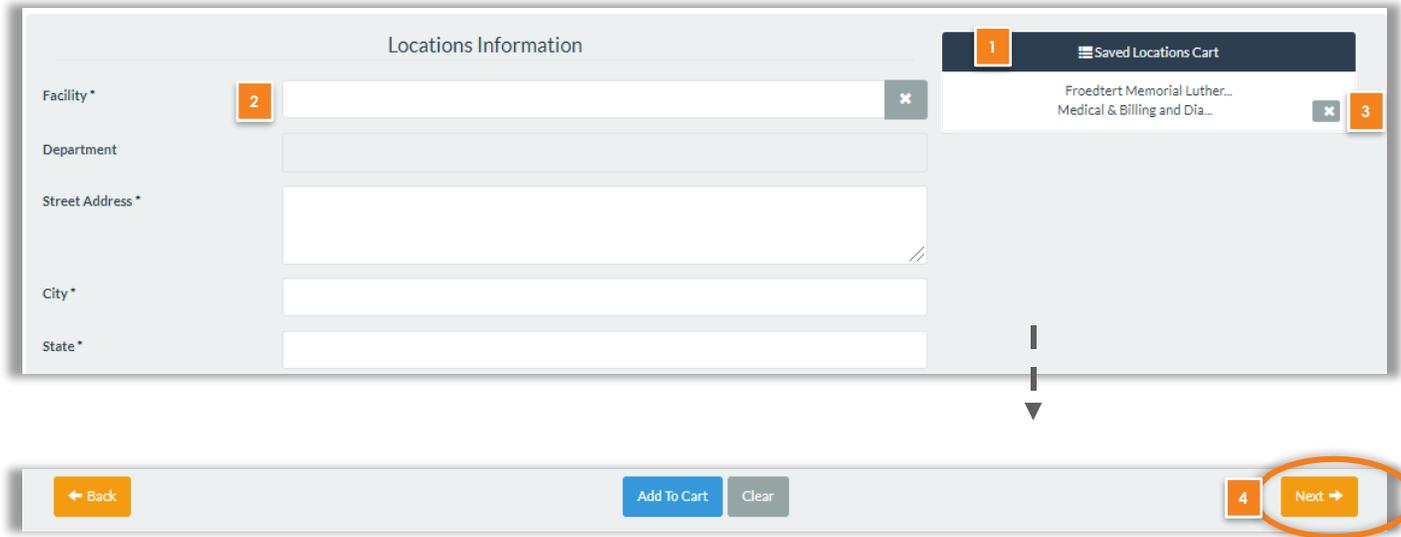
← Back 3 Add To Cart Clear Next →

1. Select the “**Record Type**” for the location from the dropdown. This is required for every order.
2. The Scope Details section will auto-populate, broken out by each Record Type. These details will appear on the request to the custodian.
  - *Did You Know?* You can update/edit the Scope Details by highlighting the text and deleting verbiage and adding your own verbiage.
3. Click “**Add to Cart**” to save the location.

\* A **Record Type** request for *diagnostic imaging* will produce any and/all or the specified date range of films from the provider. A *Film Breakdown/Imaging Inventory* is a request for the provider to, (instead of producing ALL of the films within the scope of the request) provide a list/inventory of all films they have on file for that patient. The imaging inventory then allows the user/requestor to pick and choose the films they would like the provider to produce from the inventory/breakdown list.

# Ordering Records - Subpoena

## Saved Locations



The screenshot shows a web interface for adding locations. On the left, the 'Locations Information' form has fields for Facility\*, Department, Street Address\*, City\*, and State\*. A red box labeled '2' highlights the Facility\* field. On the right, the 'Saved Locations Cart' contains one item: 'Froedtert Memorial Luther... Medical & Billing and Dia...'. A red box labeled '3' highlights the 'X' icon next to this item. A red box labeled '1' highlights the cart header. At the bottom, a navigation bar contains 'Back', 'Add To Cart', 'Clear', and 'Next' buttons. A red box labeled '4' highlights the 'Next' button, which is also circled in orange. A dashed arrow points from the cart area down to the 'Next' button.

1. The saved facility will appear on the right-hand side of the screen.
2. Continue to add locations that you are requesting records from.
3. To remove a location, click the “X”.
4. Once the final location is added to the cart, click “Next” at the bottom of the screen.

# Parties To Be Noticed - Subpoena

## Entering Opposing and Co-Counsel Information

Parties To Be Noticed  
(Not the Ordering Party/Firm)

[Click To Skip](#)

1 Counsel Type \*  
Applicant  
Claimant  
Defendant  
Employer / Carrier  
Intervenor  
Petitioner  
Plaintiff  
Respondent

2 Name of Party Representing \*

3 Firm Name \*  
Address \*  
City \*  
4 State \*  
Zip Code \*  
Phone \*  
Fax \*  
Attorney Name \*  
Attorney Email \*  
E-Serve Email  
email@primary.com,email@secondary.com

9  Plaintiff's Atty

Send ordered records to this party at my expense  Yes  No

Records On-Line  Records On Paper  Records On CD  Films On CD

5 [Add To Cart](#) [Clear](#) 10 [Next](#)

6 Saved Parties Cart  
Larry Lawyer  
Larry Lawyer

7 X

8

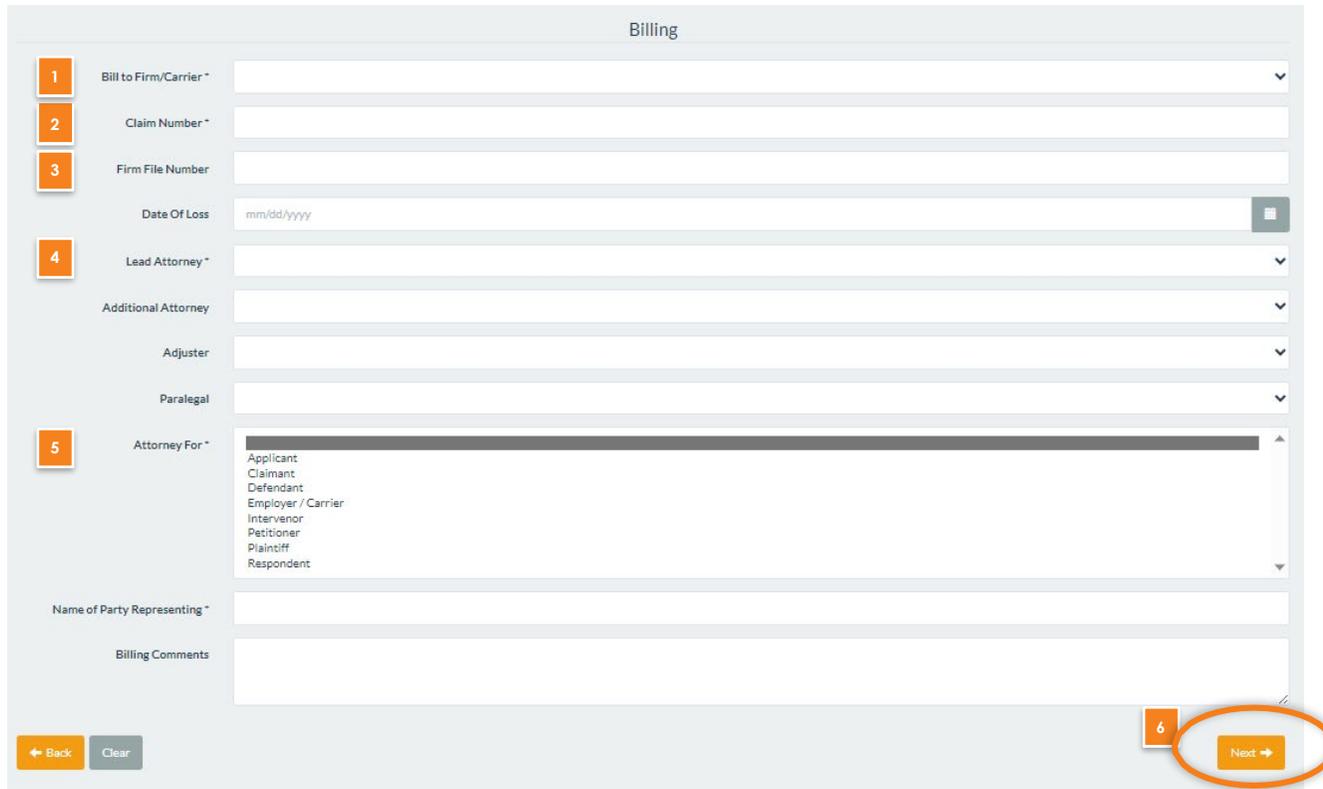
Complete the Parties To Be Noticed

Fields with **an asterisk (\*)** are required.

1. Select the **“Counsel Type”** from the drop-down selections.
2. Enter the **“Name of Party Representing”**.
3. As you begin to type the **“Firm Name”**, the form will suggest a Firm Name. If the suggestion matches what you are looking for, click the name.
  - If the suggestion does not match what you are looking for, all other fields must be completed.
4. Type the **“State”** and select from the pre-filled match
5. Once the information is entered, click **“Add to Cart”**.
6. The saved party will appear on the right-hand side of the screen.
7. To remove a location, click the **“X”**.
8. To edit the Party, click the entity name.
9. Indicate the **“Plaintiff's Atty Firm”**.
10. Once the final party is added to the cart, **click “Next”** at the bottom of the screen

# Ordering Records - Subpoena

## Billing



Complete the Billing Information

1. “**Bill to Firm/Carrier**” name can be selected from the dropdown.
  - Select the insurance carrier to be billed for this case
  - If you would like to add a carrier to your list of options, please contact your Account Manager or Client Service Specialist to discuss.
2. “**Claim Number**” is required.
  - It's suggested to copy & paste the Claim Number to ensure accurate entry and for invoicing purposes.
3. “**Firm File Number**” enables you to enter a number that is specific to their firm so orders can be easily searched in the My.Ontellus portal.
4. Select the “**Lead Attorney**” or main contact ordering on the case/claim.
5. Select the appropriate selection for “**Attorney For**”.
6. Click “**Next**” to continue.

# Ordering Records - Subpoena

## Document Upload

Document Upload

Please click on Upload File to select document(s) to be submitted with your order.

#	Name	Progress
1	<p>File Name: Signed HIPAA Authorization.docx</p> <p>Document Type*: Authorization</p>	<p>Complete</p> <p>Trash Can icon</p>

1

2

3

← Back Upload File Clear

3 Next →

1. Click **“Upload File”** to select a file to attach to the order. This is just like attaching a file to an email.
2. Select the **“Document Type”** from the dropdown.
  - Select **“Upload File”** again to attach additional files.
  - Select the Trash Can icon to delete a file.
3. Click **“Next”** to review your order before submitting.

**IMPORTANT:** Ontellus requires a Signed Authorization to be uploaded to the order prior to processing the request.

# Ordering Review – Subpoena

## Review Before Submission



Review the information entered on the order for accuracy.

You will notice that if you entered an SSN, Full or Partial, the Order Confirmation page only shows the last 4 digits for privacy and confidentiality purposes.

- Select “ ← **Back**” to make any changes on any previous screens.
- Scroll down to the bottom of the page to click “**Submit Order**”.

**IMPORTANT:** Once you click “Submit Order” you cannot go back on the portal and make any changes to the order. Please contact your Customer Client Specialist to make changes.

Confirm Order Information

Please review the information below for completeness & accuracy.  
Revisions after submission may result in order delay & additional charges.

Case Information:  
Case Type:  
State:  
County:  
Court Name:  
Court Docket No:  
Case Style:  
Remarks:  
Trial Date:  
Rush:

Records Subject Information:  
Business Records:  
Records Subject Type:  
Subject Name:  
DOB:  
SSN:  
Address:  
City:  
State:  
Zip Code:

Locations Information:  
Facility Name:  
Substitute:  
Department:

← Back

The Ontellus [Privacy Policy](#) and [Terms & Conditions](#) apply

Submit Order

# Confirmation Email



1

## COMPLETE

Order Submission Complete!  
Thank you for submitting your order. To review or print your Order Confirmation and/or case document(s), please visit your [Case Repository](#). To continue ordering, please visit the [Order Records](#) page.

[Click here to Copy Order](#)

2



## Thank You for Your Order!

Order Confirmation  
Re: John Doe  
Claim No. 123456789-01  
Order No. 368191

Hello Larry Lawyer ,

Thank you for ordering with us.

### ORDER LOCATIONS:

1. Advocate Lutheran General Hospital , 1775 West Dempster Street , Park Ridge , Illinois , 60068
2. Rush Copley Medical Center , 2000 Ogden Avenue , Aurora , Illinois , 60504

To view the details of your order, please go to My Case Manager in the Ontellus Client Portal at [secure.ontellus.com](https://secure.ontellus.com).

We will send a records notification email when records are available for download.

If you have any questions, please contact your Client Manager or [customerservice@ontellus.com](mailto:customerservice@ontellus.com).

Have a Great Day,  
Your Ontellus Team

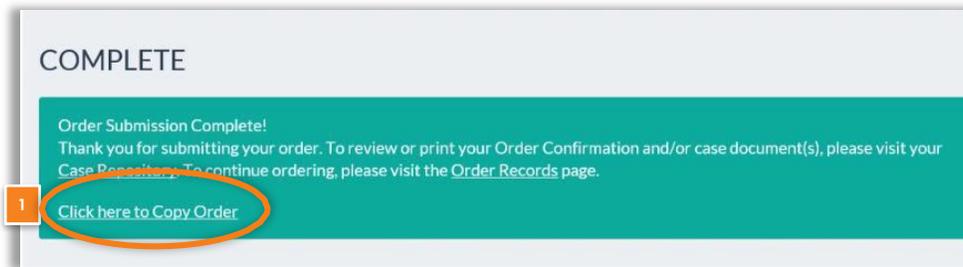
1. A confirmation notification will appear once you've submitted the order.
  2. You will receive a confirmation email shortly after order submission confirming that your order has been placed.
- Ontellus will send a notification email when records are ready for review.
  - Click [here](#) to see how to View Records.

# Copy New/Existing Orders

The Copy Order feature saves you time when, for example, you have multiple subjects injured in the same accident receiving treatment at the same location/facility. When copying the order, this will copy all the information on a case, except for the Records Subject Information (Name, DOB, SSN, and Address, etc.), to the new order.

A copy of an order can be started two ways:

1. At the time of a previous order submission.



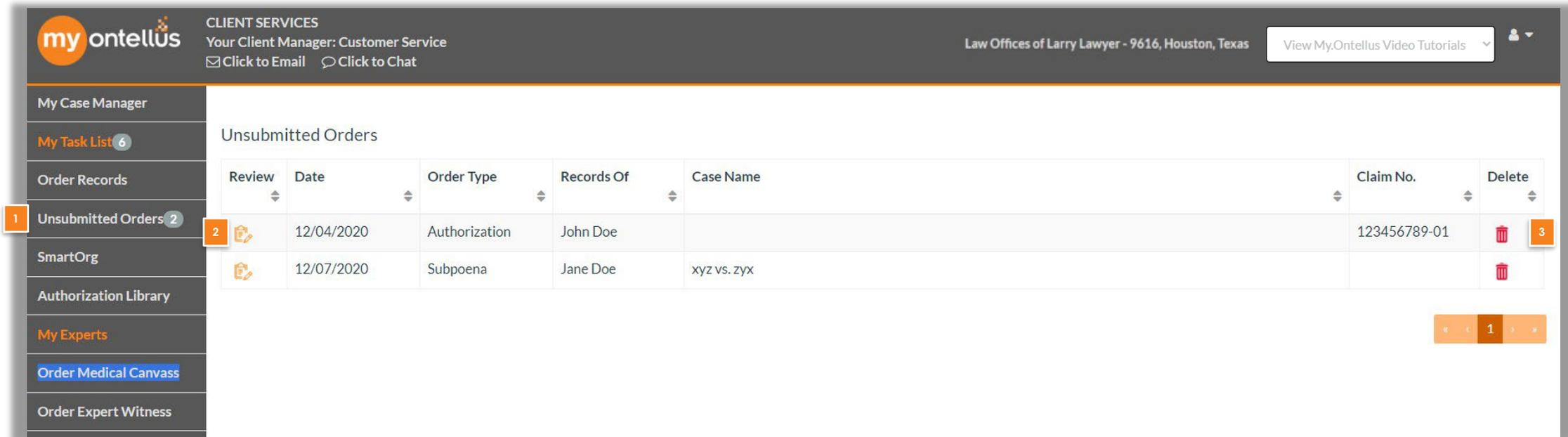
2. From “**My Case Manager**”.
  - Navigate to “**My Case Manager**”.
  - Locate Order by Order Number, Records Of, Claim Number or Firm File Number.
  - Click “**Copy**” under Action.

Order No.	Office	Contact	Records Of	Case Name	Claim No.	Firm File No.	Add	Action
209318	Law Offices of Larry Lawyer - 9616	Larry Lawyer	Mary Anne Johnson	Mary Anne Johnson vs. Company X	ABC 123456			

# Unsubmitted Orders

The *Unsubmitted Orders* section allows users to review orders that have not been submitted to Ontellus for processing.

1. Navigate to **“Unsubmitted Orders”** on the left Navigation pane.
2. Click the *Clipboard* icon in the Review column to review the order and finish entering outstanding information. Then submit to Ontellus for processing.
3. If the order is not needed, click the *Delete* icon in the Delete column to remove the order.



my ontellus CLIENT SERVICES  
Your Client Manager: Customer Service  
Law Offices of Larry Lawyer - 9616, Houston, Texas View My.Ontellus Video Tutorials

My Case Manager  
My Task List 6  
Order Records  
Unsubmitted Orders 2  
SmartOrg  
Authorization Library  
My Experts  
Order Medical Canvass  
Order Expert Witness

Review	Date	Order Type	Records Of	Case Name	Claim No.	Delete
	12/04/2020	Authorization	John Doe		123456789-01	
	12/07/2020	Subpoena	Jane Doe	xyz vs. zyx		

1

EASY. FAST. EFFICIENT

---

# Checking Order Status

# Checking Order Status

## On Demand Order Tracking

CLIENT SERVICES  
Your Client Manager: Katherine Werner  
Click to Email Click to Chat

Law Offices of Larry Lawyer - 9616, Houston, Texas View My Ontellus Video Tutorials

My Case Manager **1**

My Task List

Order Records

Unsubmitted Orders: 41

SmartOrg

Authorization Library

Q Order Number Q Records Of Q Contact Q Claim No. Q Firm File No.

Order No.	Office	Contact	Records Of	Case Name	Claim No.	Firm File No.	Action
477959	Law Offices of Larry Lawyer - 9616	Adam Lancaster	John Doe	John Doe vs. AAA	y098t		

### Order Details

Print

Order Number: 477959 Claim Number: y098t

Records Of: John Doe Firm File Number:

Office: Law Offices of Larry Lawyer - 9616

Add to Case Share Documents Documents Repository 1 Cancel Order Smart Org Order Claim Eval Record Summary SmartChron

Record Orders Smart Map

Locations Status Record Type Expand

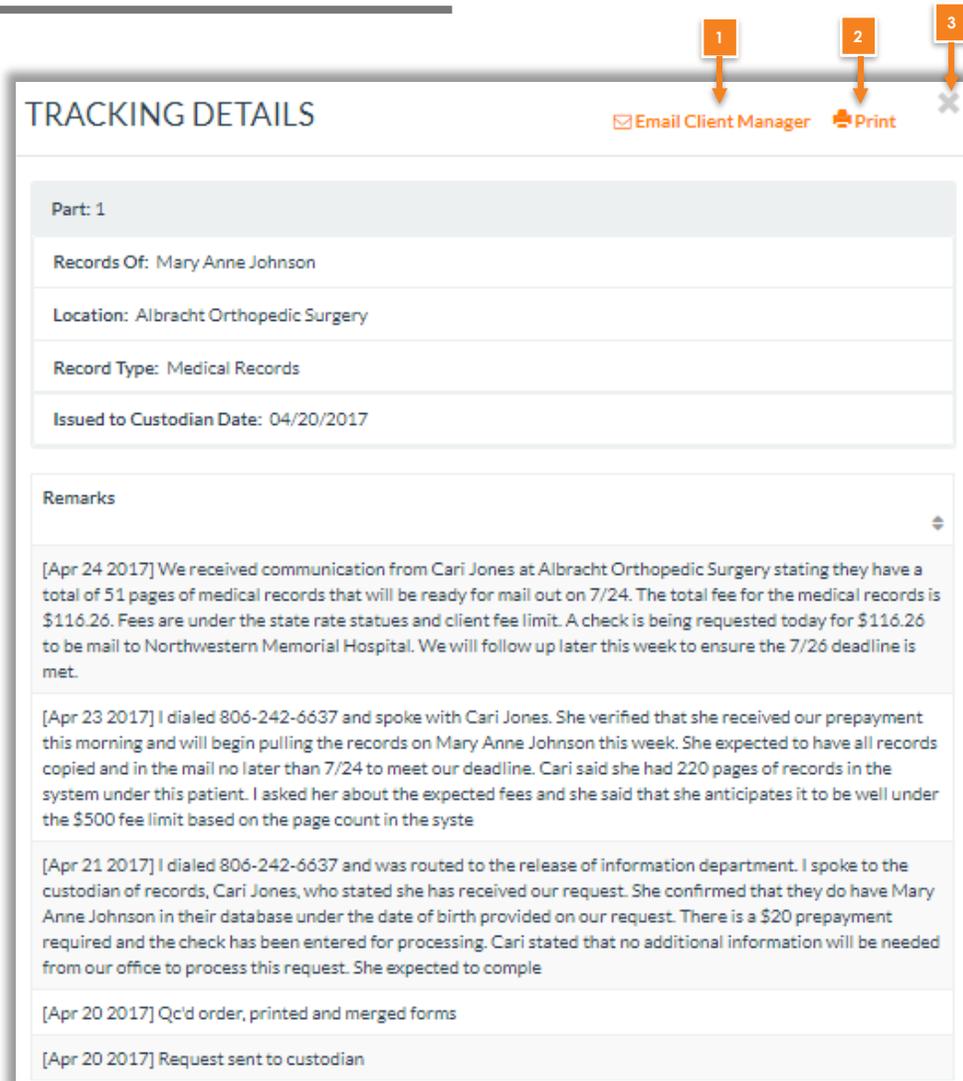
Part No.	Order Date	Record Type	Status	Records
1	07/20/2023	Medical Records	Order Received-In Creation	View

To check the status of a record request, navigate to **“My Case Manager”** from the Navigation pane.

1. Enter an **“Order Number”**, **“Contact, Records of”**, or **“Claim Number”** to find the correct order.
2. Click on an **“Order No.”** to see the details of the order.
3. The words in orange text under the **“Status”** column is the **“big picture status.”** Think of this like Shipping Details, you might see **“In Progress”** or **“Out for Delivery”** or **“In Transit”**.
4. Click the **“Status”** in orange text to view the *Tracking Details* for each order part.
5. New viewing capabilities allow you to **sort custodian list in alphabetical order**, **collapse or expand location order details for all or individual locations** and **filter requests by status or record type**

# Checking Order Status

## Tracking Details



**TRACKING DETAILS**

[Email Client Manager](#) [Print](#) ✕

**Part: 1**

**Records Of:** Mary Anne Johnson

**Location:** Albracht Orthopedic Surgery

**Record Type:** Medical Records

**Issued to Custodian Date:** 04/20/2017

**Remarks**

[Apr 24 2017] We received communication from Cari Jones at Albracht Orthopedic Surgery stating they have a total of 51 pages of medical records that will be ready for mail out on 7/24. The total fee for the medical records is \$116.26. Fees are under the state rate statues and client fee limit. A check is being requested today for \$116.26 to be mail to Northwestern Memorial Hospital. We will follow up later this week to ensure the 7/26 deadline is met.

[Apr 23 2017] I dialed 806-242-6637 and spoke with Cari Jones. She verified that she received our prepayment this morning and will begin pulling the records on Mary Anne Johnson this week. She expected to have all records copied and in the mail no later than 7/24 to meet our deadline. Cari said she had 220 pages of records in the system under this patient. I asked her about the expected fees and she said that she anticipates it to be well under the \$500 fee limit based on the page count in the syste

[Apr 21 2017] I dialed 806-242-6637 and was routed to the release of information department. I spoke to the custodian of records, Cari Jones, who stated she has received our request. She confirmed that they do have Mary Anne Johnson in their database under the date of birth provided on our request. There is a \$20 prepayment required and the check has been entered for processing. Cari stated that no additional information will be needed from our office to process this request. She expected to comple

[Apr 20 2017] Qc'd order, printed and merged forms

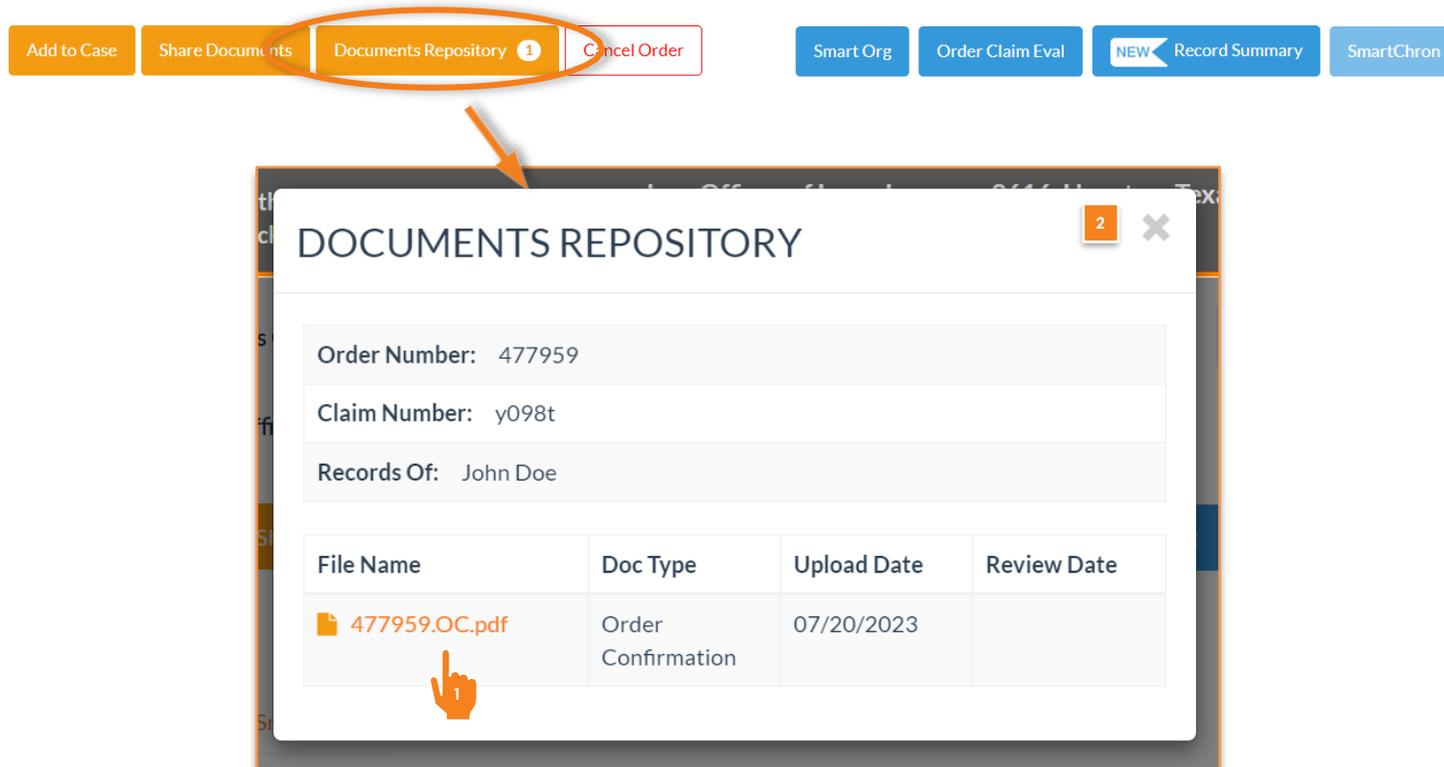
[Apr 20 2017] Request sent to custodian

The Tracking Details will give you a complete look at the status of the order.

1. Click on the **Email Client Manager** link to open an email to your Client Manager.
2. Click **Print** to print or save a copy of the tracking detail.
3. Click the **X** in the top right corner to exit the "Tracking Details".

# Documents Repository

- To view any files pertinent to a case, navigate to **“My Case Manager”** from the Navigation pane.
- Enter an **“Order Number”**, **“Contact”**, **“Records of”**, or **“Claim Number”** to find the correct order.
- Click the **“Documents Repository”** button from the Order Location.



DOCUMENTS REPOSITORY

Order Number: 477959

Claim Number: y098t

Records Of: John Doe

File Name	Doc Type	Upload Date	Review Date
 477959.OC.pdf	Order Confirmation	07/20/2023	

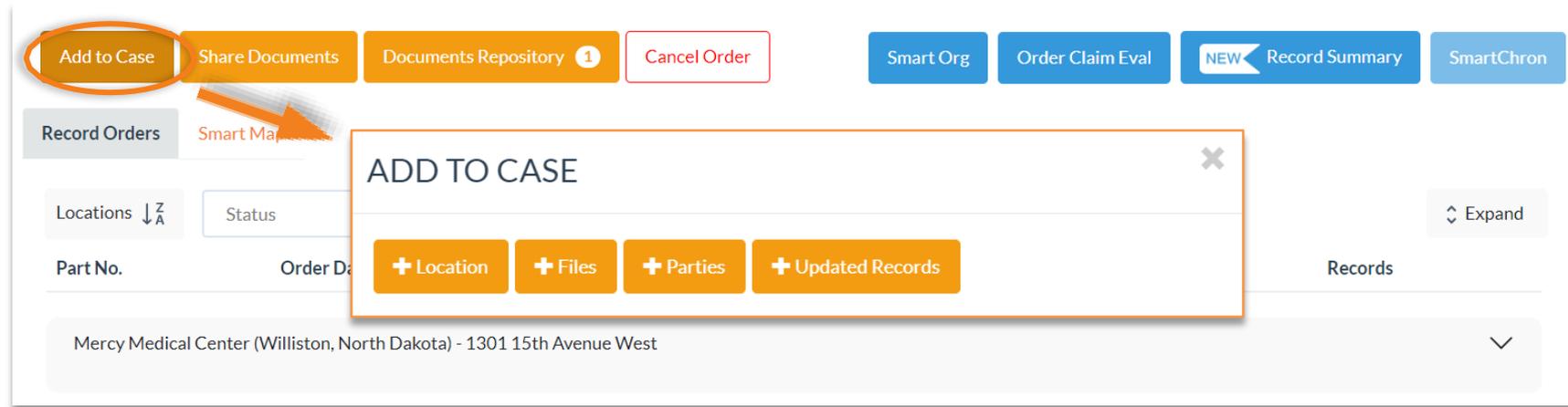
In the **Documents Repository**, you will find files such as: a full order confirmation, any HIPAA authorizations, attachments you included when the order was placed, and a copy of the request that was sent to the custodian.

1. To view or download a file, click the file name in orange text.
  - Open or save the file if prompted.
2. Click the **X** in the top right corner to exit the Documents Repository.

# Adding to an Existing Order

If you have new information to add to an existing Ontellus order, locate the Order/Case in the portal.

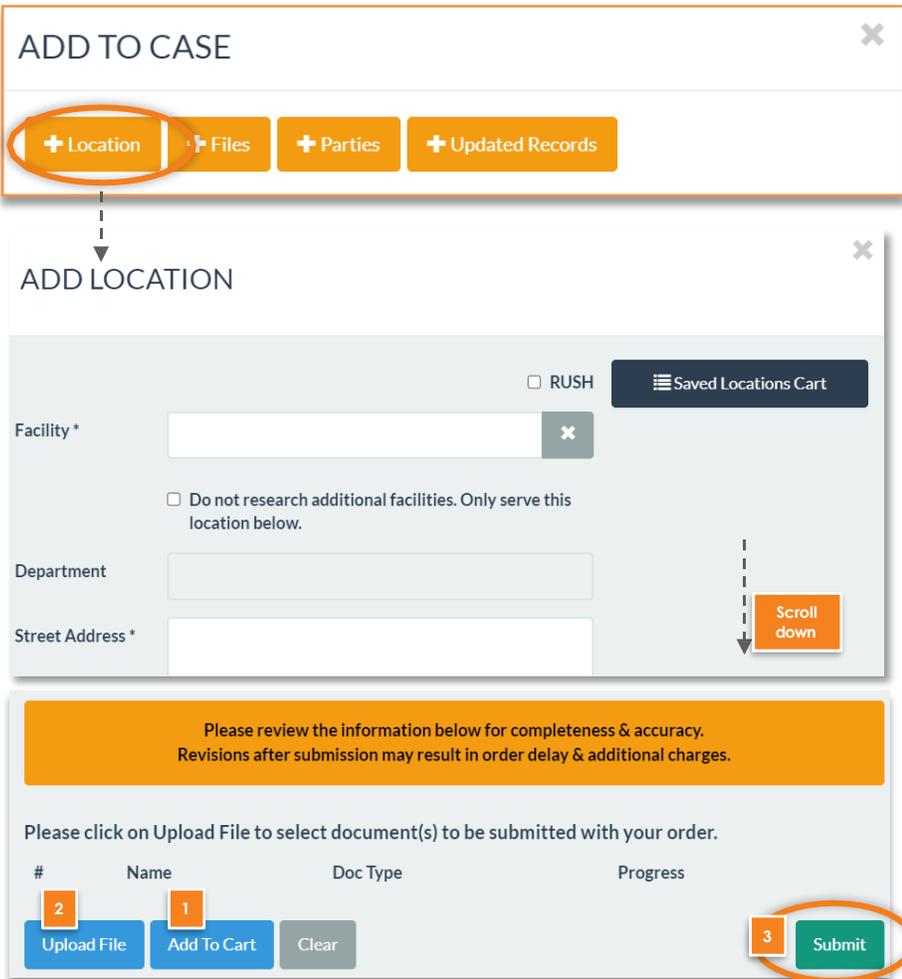
- Navigate to **“My Case Manager”**.
- Locate Order by **“Order Number”**, **“Records Of”**, **“Claim Number”** or **“Firm File Number”**.



- Click the **“Add to Case”** to the left of the Share Documents.
- Select the type of additional information you would like to add.

# Adding to an Existing Order

After clicking on “**Add to Case**” on the Order Locations screen, click “**+Location**” to add additional locations to an existing order or request additional record types from a provider.



**ADD TO CASE**

+ Location + Files + Parties + Updated Records

**ADD LOCATION**

RUSH Saved Locations Cart

Facility\*

Do not research additional facilities. Only serve this location below.

Department

Street Address\*

Scroll down

Please review the information below for completeness & accuracy.  
Revisions after submission may result in order delay & additional charges.

Please click on Upload File to select document(s) to be submitted with your order.

#	Name	Doc Type	Progress
2	1		

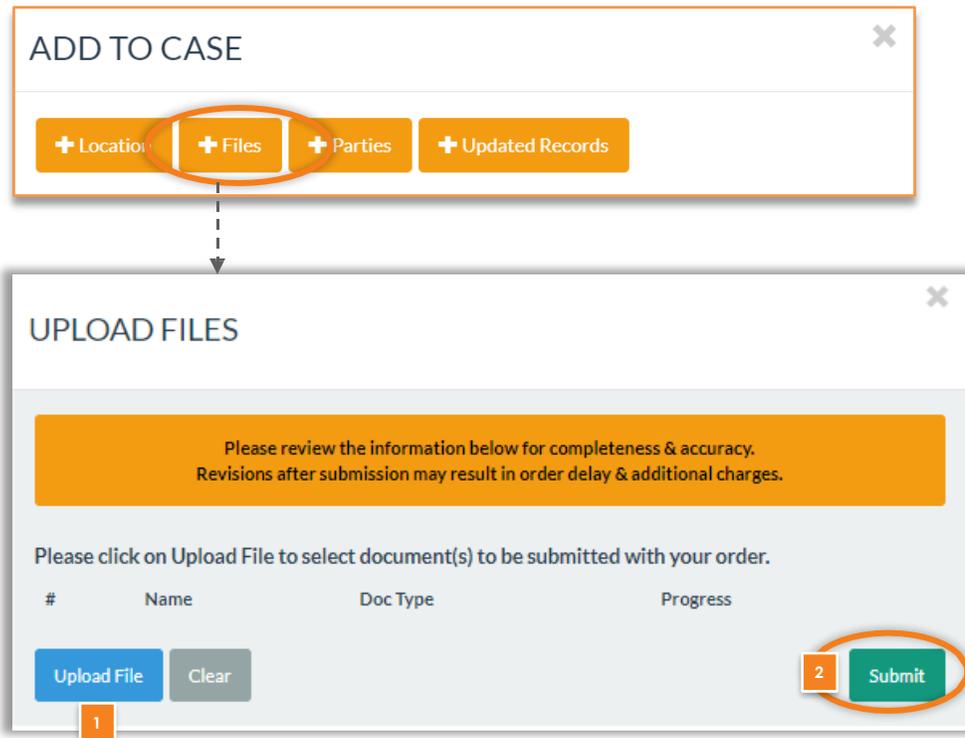
Upload File Add To Cart Clear Submit

A window will pop forward where you can add one or multiple locations to your existing order.

1. Complete the required fields and click “**Add to Cart**”.
2. Select “**Upload File**” to include any supporting documentation and select the correct “**Doc Type**”.
3. Click “**Submit**” to submit the new file to Ontellus.

# Adding A File/Document an Existing Order

To securely send a file pertinent to an existing order/case, select “**+Files**” from the “**Add To Case**” menu. This will allow you to upload documents such as an authorization, letter of representation, power of attorney, or any other files.



ADD TO CASE

+ Location + Files + Parties + Updated Records

UPLOAD FILES

Please review the information below for completeness & accuracy.  
Revisions after submission may result in order delay & additional charges.

Please click on Upload File to select document(s) to be submitted with your order.

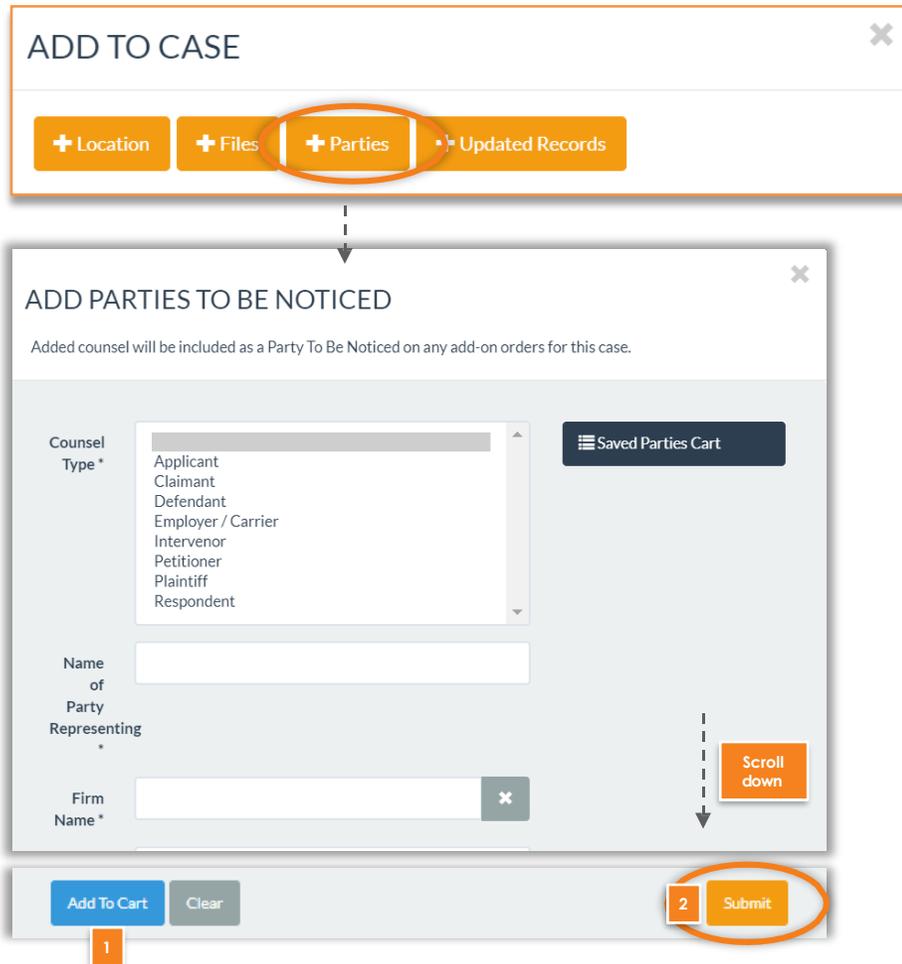
#	Name	Doc Type	Progress
---	------	----------	----------

Upload File Clear Submit

1. Select the “**Upload File**” button and attach the file as if you were attaching a file to an email.
2. Upload any supporting documentation and click “**Submit**” to submit the new file to Ontellus.

# Adding A Party to an Existing Order

To add additional Parties to the case, click “**+Parties**” from the **Add to Case** menu and enter the firm and attorney's contact information.

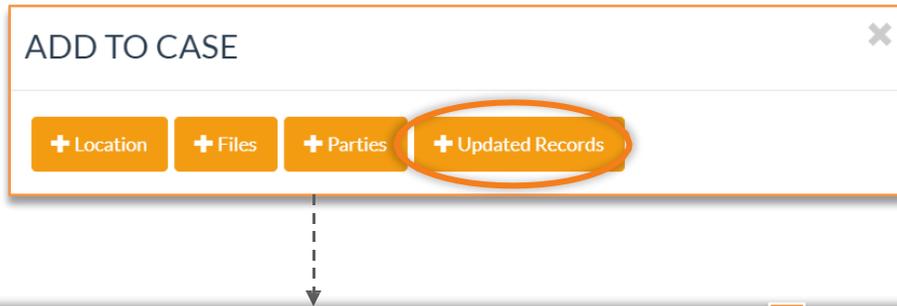


The image shows two screenshots of the Ontellus interface. The top screenshot, titled 'ADD TO CASE', features a horizontal menu with four buttons: '+ Location', '+ Files', '+ Parties', and '+ Updated Records'. The '+ Parties' button is circled in orange. A dashed arrow points from this button to the second screenshot. The second screenshot, titled 'ADD PARTIES TO BE NOTICED', contains a form with the following fields: 'Counsel Type \*' (a dropdown menu with options: Applicant, Claimant, Defendant, Employer / Carrier, Intervenor, Petitioner, Plaintiff, Respondent), 'Name of Party Representing \*' (a text input field), and 'Firm Name \*' (a text input field with a clear button). A 'Saved Parties Cart' button is located to the right of the 'Counsel Type' dropdown. At the bottom of the form, there are three buttons: 'Add To Cart', 'Clear', and 'Submit'. The 'Submit' button is circled in orange and has a small orange box with the number '2' next to it. A 'Scroll down' button is also visible on the right side of the form. A small orange box with the number '1' is positioned below the 'Add To Cart' button.

1. Complete the required fields and click “**Add to Cart**”.
2. Click “**Submit**” to submit the new party to Ontellus.

# Request Updated Records

To order updated records from a location, in addition to what has already been obtained, click “+Updated Records” from the **Add to Case** menu.



Part No.	Location Name	Record Type	Previous Submission Date	Select From/To date range for an updated order			Rush
				From	To Present	To	
	<input type="checkbox"/> Select All <span>1</span>				<input type="checkbox"/>		<input type="checkbox"/>
18	<input type="checkbox"/> Elk Pharmacy	Pharmacy Records	04/20/2017	<input type="text" value="04/20/2017"/>	<input type="checkbox"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="checkbox"/>
14	<input type="checkbox"/> Memorial Hospital of Texas County	Billing Records	04/20/2017	<input type="text" value="04/20/2017"/>	<input type="checkbox"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="checkbox"/>
13	<input type="checkbox"/> Memorial Hospital of Texas County	Medical Records	04/20/2017	<input type="text" value="04/20/2017"/>	<input type="checkbox"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="checkbox"/>
12	<input type="checkbox"/> BSA Health System	Billing Records	04/20/2017	<input type="text" value="04/20/2017"/>	<input type="checkbox"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="checkbox"/>
11	<input type="checkbox"/> BSA Health System	Medical Records	04/20/2017	<input type="text" value="04/20/2017"/>	<input type="checkbox"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="checkbox"/>
10	<input type="checkbox"/> Dr. Paullus / Southwest Neuroscience & Spine Center	Medical and Billing Records	04/20/2017	<input type="text" value="04/20/2017"/>	<input type="checkbox"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="checkbox"/>

You will see all available locations that you can order updated records from.

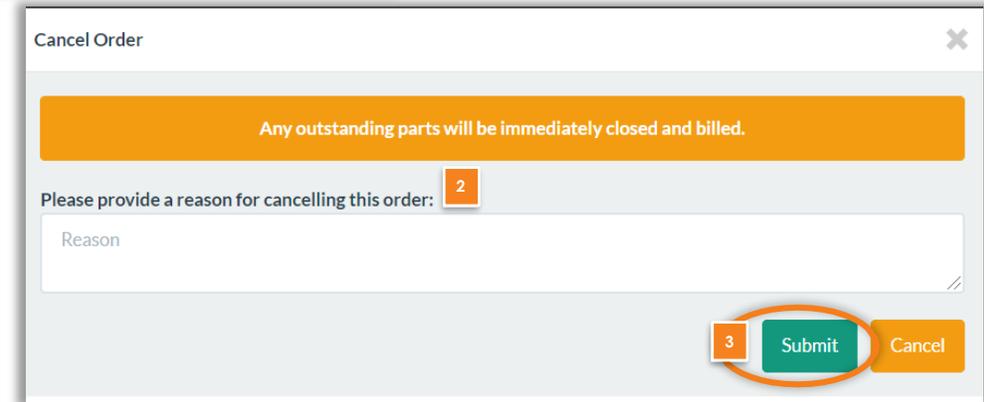
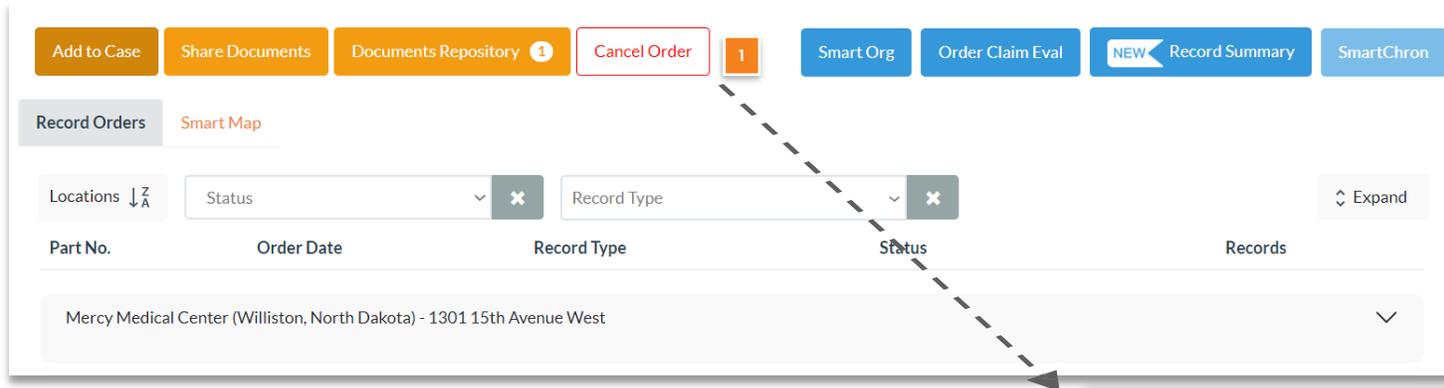
1. You can identify the specific location from which you would like to order updated records by selecting the checkbox next to the Location Name or “**Select All**”.
2. Select the “**From**” and “**To**” time frame.
  - The previous order date will auto populate in the “**From**” field.
  - Update the date by either selecting from the calendar icon or typing in a date in xx/xx/xxxx format.
  - Select either “**To Present**” or select a “**To**” date from the calendar icon or typing in a date in xx/xx/xxxx format.
3. If you need to request this as a Rush, select “**Rush**” in the last column.
4. Click the “**Submit**” button when all the criteria has been selected and you are ready to place the order.



# Cancel an Existing Order

If you need to cancel an order, you can do so in the Order Details Screen.

- Navigate to **“My Case Manager”**.
- Locate Order by **“Order Number”**, **“Records Of”**, **“Claim Number”** or **“Firm File Number”**.



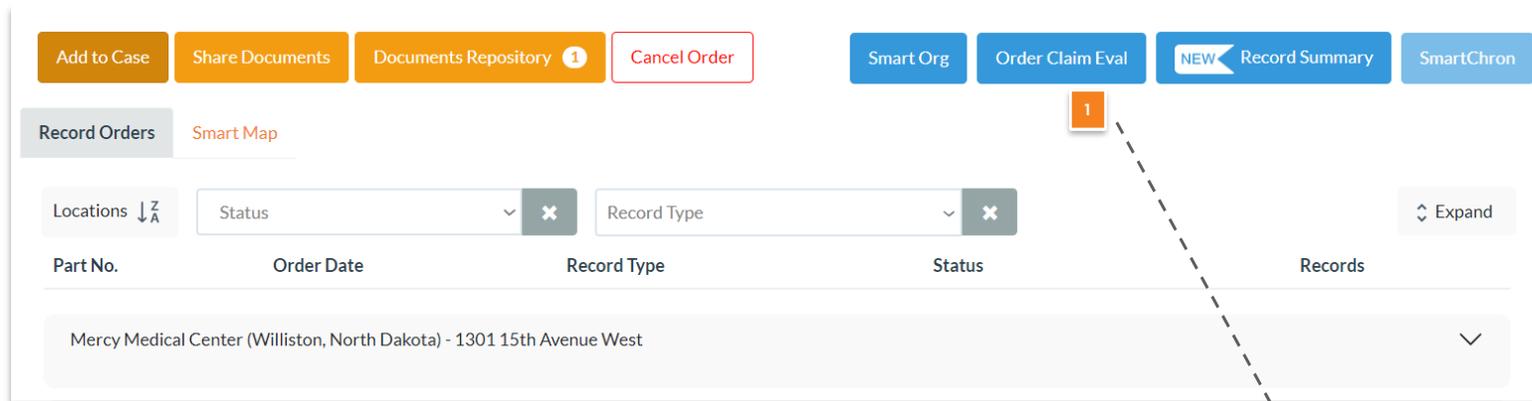
1. Click **“Cancel Order”** in the menu bar above the order.
2. Provide a reason for cancelling the order. For example, 'Case settled'.
3. Click **“Submit”**.

**IMPORTANT:** Canceling the order cancels the entire order request. If you would like to cancel part/location of the order, please contact your Client Service Specialist.

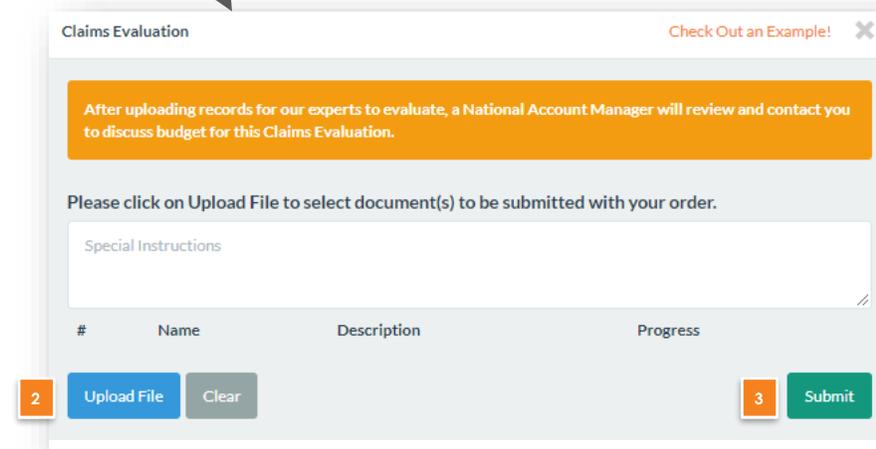
# Order Claim Evaluation

The Claim Evaluation is an intelligent and comprehensive report, interpreting the content of the records. This detailed report provides expert analysis to help establish the reasonable value of a claim.

- Navigate to “**My Case Manager**”.
- Locate Order by “**Order Number**”, “**Records Of**”, “**Claim Number**” or “**Firm File Number**”.



1. Click “**Order Claim Eval**” in the menu bar above the order.
2. Click “**Upload File**” to select a file to attach records for evaluation. This is just like attaching a file to an email.
3. Click “**Submit**”.



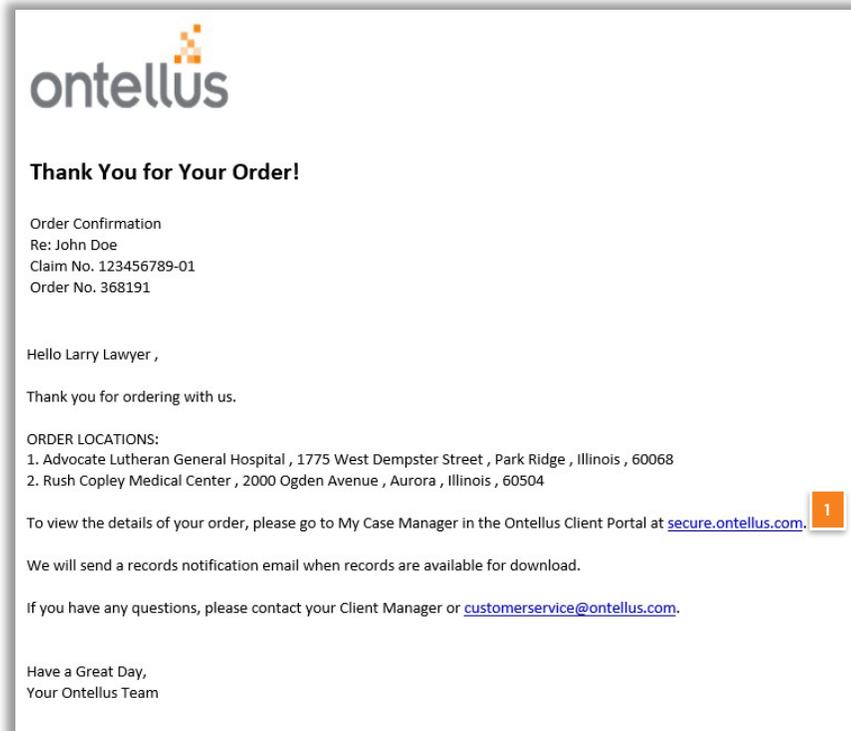
EASY TO SEE. EASY TO USE. EASY TO DISTRIBUTE.

---

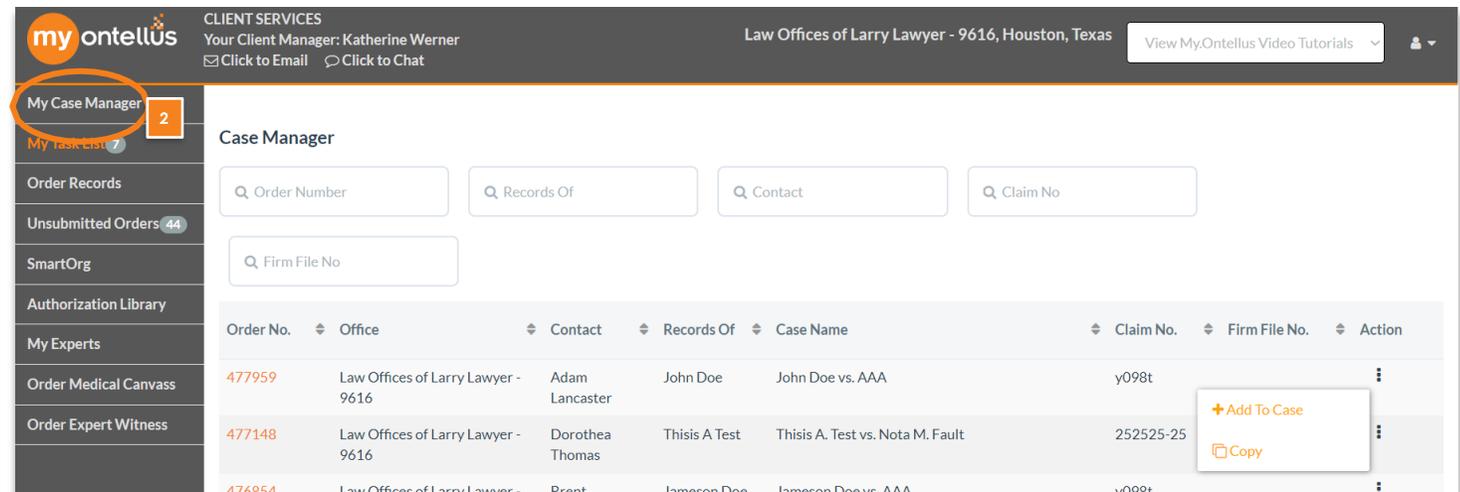
## Viewing Records

# Downloading Records

Ontellus will send a notification email when records are ready for review.



1. Click on the link provided in the email or navigate to the **“My Case Manager”**.
2. In the **“My Case Manager”** tab, locate your order.
  - Search and view your cases by Order Number, Records Of, Claim Number or Firm File Number to more easily locate your order.



# Downloading Records

## Securely Download your Organized, Indexed Files

- In the “**Records**” column on the far right, click “**View**” to open the list of available files.
  - Records can only be viewed when the “**View**” button is orange.
  - The number in the bubble indicates there is a file within this location that has not yet been viewed or downloaded.
  - The grey “**View**” button indicates that there are no records to review.

Order Details Print

Order Number: 477959      Claim Number: y098t

Records Of: John Doe      Firm File Number:

Office: Law Offices of Larry Lawyer - 9616

[Add to Case](#) [Share Documents](#) [Documents Repository 1](#) [Cancel Order](#) [Smart Org](#) [Order Claim Eval](#) [NEW Record Summary](#) [SmartChron](#)

Record Orders [Smart Map](#)

Locations ↓↑      Status      Record Type      Expand

Part No.	Order Date	Location	Record Type	Status	Records
64	06/18/2020	Advocate Good Samaritan Hospital (Downers Grove, Illinois) - 3815 Highland Avenue	Medical Records	Records Obtained	<a href="#">View 3</a>
18	06/20/2019	Elk Pharmacy (Stratford, Texas) - 317 North Main Street	Pharmacy Records	Records Obtained	<a href="#">View 1</a>
17	06/20/2019	McMurry Clinic (Guymon, Oklahoma) - 123 Medical Dr.	Medical and Billing Records	Cancelled	<a href="#">View</a>
16	06/20/2019	Coldwater Manor (Stratford, Texas) - 111 Beaver Road	Personnel and Payroll Records	Cancelled	<a href="#">View</a>

# Downloading Records

Securely Download your Organized, Indexed Files

## RECORDS OBTAINED ✕

Part: 1

Records Of: Mary Anne Johnson

Location: Albracht Orthopedic Surgery

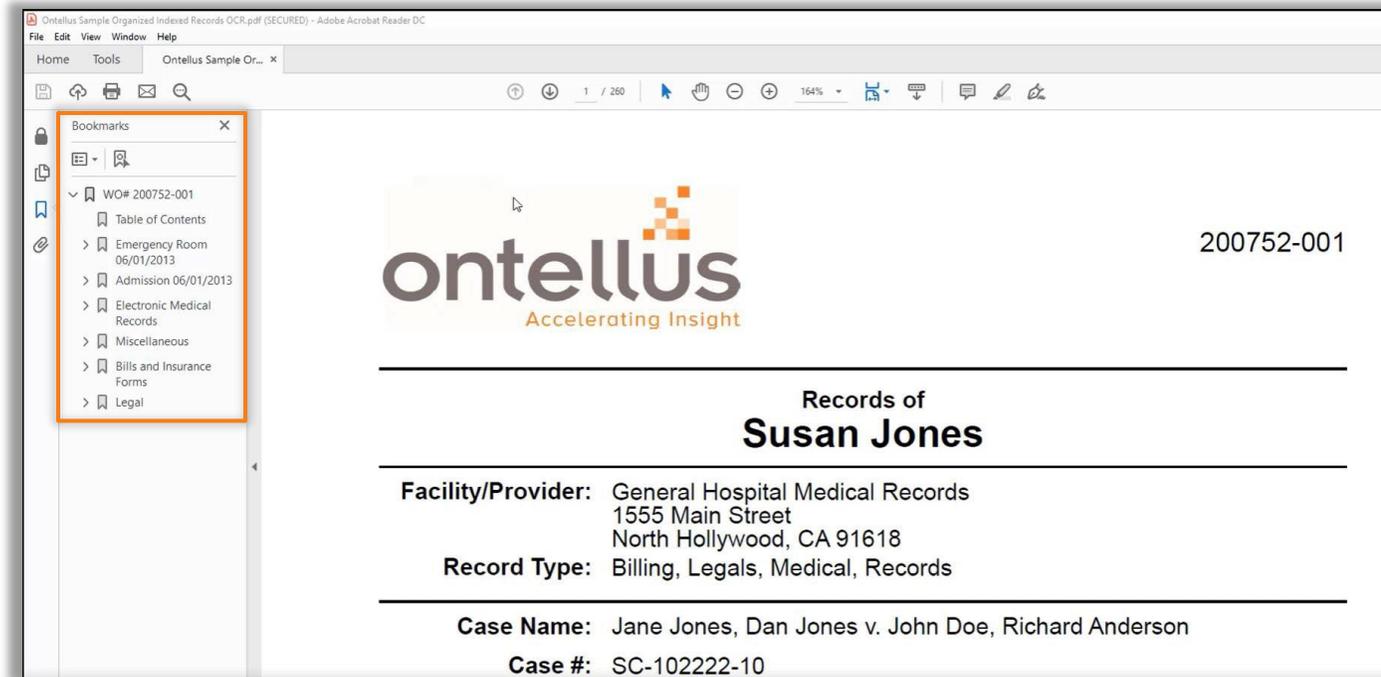
Record Type: Medical Records

Records	Document Type	Pages	Upload Date	Review Date
 <b>Medical Records</b>	Completed Records	260	06/28/2019	



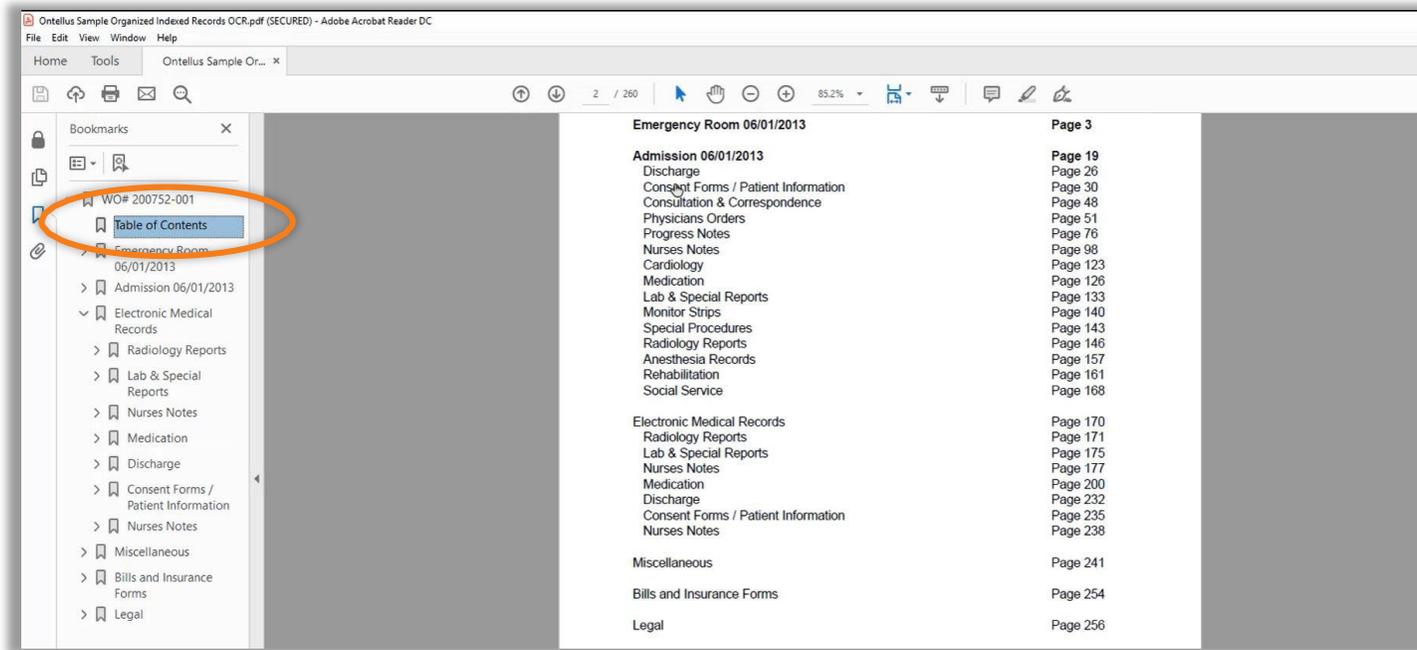
- Once the files appear, click the **File Name in Orange** to begin downloading the records.
  - You will see the number of pages, the upload date and the date the file was initially reviewed.

# Viewing Records



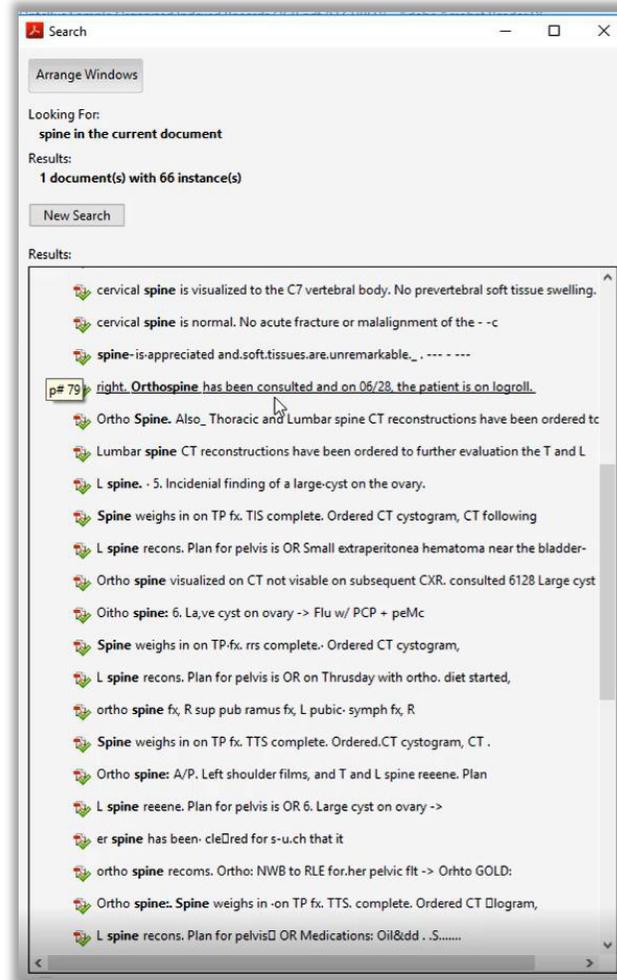
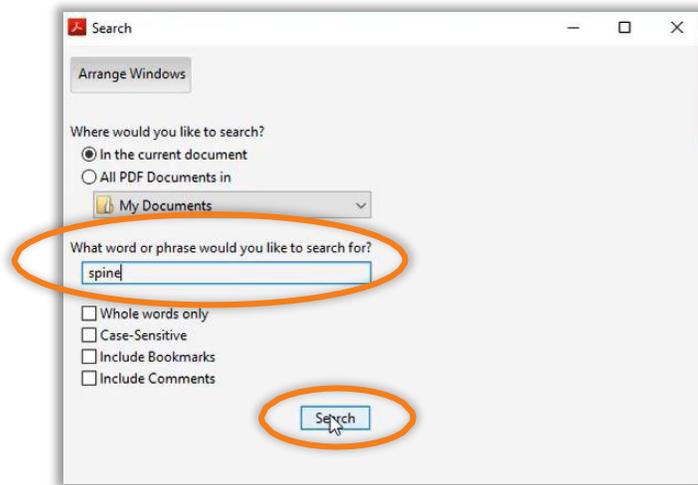
- Once you have downloaded the records and opened the document, you will see that the records are organized and indexed by record type, date, and category.
- On the left-hand side, bookmarks can be expanded to easily view parts of the record.
- Click a bookmarked section to go directly to that section of the records to review the content.

# Viewing Records



- The **Table of Contents** is hyperlinked. Clicking a section on the Table of Contents will bring you directly to that section of that record.

# Viewing Records – Optical Character Recognition (OCR)



Optical Character Recognition (OCR) allows you to see every time a word or phrase is mentioned within a set of records.

- If using Adobe, enable the Smart Search for key words or phrases by selecting **Edit > Advanced Search**.
- Keyboard Shortcut: **Shift+Ctrl+F**
- In the window, type your key word or phrase, then click Search.
- The results will display the context and the total results the word or phrase is mentioned in the records.
- Click on one of the matches and it will highlight where in the record that word or phrase is referenced.
- Save the file to your desired location and upload the document to your claims management system.

# My Task List – Open Tab

Our Task List feature displays orders requiring your attention. Examples include orders that need an authorization, fee approval, additional information, etc. Most of these requests are on hold and cannot move forward without your attention.

You will also receive an email to easily view the task on the My.Ontellus portal. By reviewing the information online, you can quickly review all requests pending and securely respond/upload needed information.

The screenshot shows the 'My Task List' interface with a sidebar on the left containing navigation options like 'My Case Manager', 'My Task List', 'Order Records', 'Unsubmitted Orders', 'SmartOrg', 'Authorization Library', 'My Experts', 'Order Medical Canvas', and 'Order Expert Witness'. The main content area is titled 'My Task List: Orders Requiring your Attention' and contains a table with columns: Order Part No., Contact, Records Of, Claim No., Location, Record Type, and Action Needed. The table lists several orders, some with 'HOLD' status and 'Need Additional Information' or 'Need Auth From Client' or 'Need Fee Approval/Records In-House' as actions. A red box labeled '1' highlights the 'Open' and 'Completed' tabs at the top of the table. Another red box labeled '2' highlights a date input field in the 'Action Needed' column for the order with part number 209318, which has the action 'DOB Required'.

Order Part No.	Contact	Records Of	Claim No.	Location	Record Type	Action Needed
329136.001	Scott Francis	Joe Schmo	123456	CVS Pharmacy (Corporate) (Woonsocket, Rhode Island) - Attn: Prescription Records One CVS Drive, Mail Code B120	Medical and Billing Records	HOLD Need Additional Information
403899.001	Sean White	Donald Smith	654123	Baton Rouge Clinic (Baton Rouge, Louisiana) - Attn: Medical Records ROI 7373 Perkins Rd	Medical & Billing and Diagnostic Imaging	HOLD Need Additional Information
344435.002	Amanda Jensen	Sue Johnson	ABC 123456	Stratford Family Medical (Stratford, Texas) - 1220 Prunell	Medical Records	HOLD Need Auth From Client
329136.002	Scott Francis	Joe Schmo	123456	Memorial Hermann Hospital (Houston, Texas) - 6411 Fannin St., 1 Robertson	Medical & Billing and Diagnostic Imaging	HOLD Need Fee Approval/Records In-House
209318	Larry Lawyer	Mary Anne Johnson				DOB Required. <input type="text" value="mm/dd/yyyy"/> Update Process As Is
209318	Larry Lawyer	Mary Anne Johnson				Last 4 of SSN Required. XXX-XX-#### Update Process As Is
209318	Larry Lawyer	Mary Anne Johnson		Radnet At Marlton (Marlton, NJ) - 999 Route 73 North, SUITE 101	Billing, Diagnostic Imaging, Medical	Additional Documents Required to Process Order. Upload Submit

1. My Task List includes an **Open** and **Completed Tab** to help manage your orders more efficiently.
2. Review the **Action Needed** within the Open Tab as to why the order is on hold and quickly respond with the information requested.

# My Task List – Completed Tab

## My Task List **Completed Tab**

- This tab shows the confirmation or acknowledgement of the data/selection you entered on the Open Tab for easy reference.

The screenshot shows the 'My Task List' interface with the 'Completed' tab selected. The header includes the 'my ontellus' logo, 'CLIENT SERVICES', 'Your Client Manager: Katherine Werner', and contact options for email and chat. The user's location is 'Law Offices of Larry Lawyer - 9616, Houston, Texas'. A dropdown menu for 'View My.Ontellus Video Tutorials' and a user profile icon are also visible.

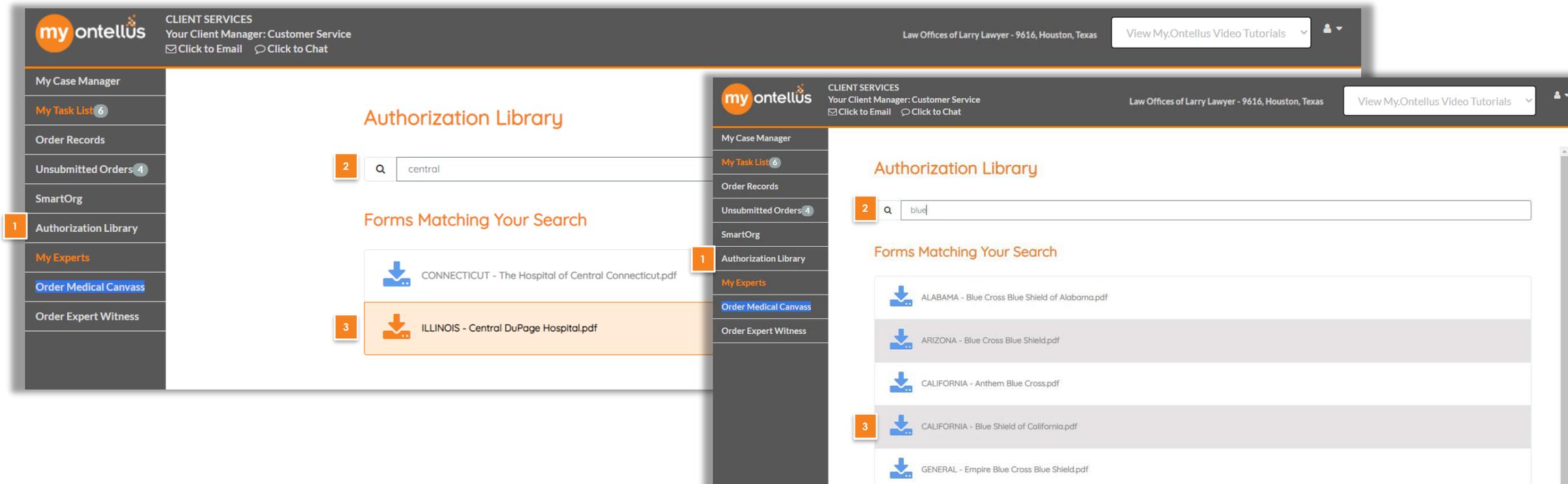
The main content area is titled 'My Task List: Completed Tasks' and contains a table with the following data:

Order Part No.	Contact	Records Of	Claim No.	Location	Record Type	Updated By	Updated Date	Entered Data
430404	David Wilson	Troy Roberts	654123			Jadii Castillo	08/22/2022	Last 4 of SSN Required. ✔ Process As-Is
432414	Adam Lancaster	Mary Anne Johnson	123456			Jadii Castillo	08/15/2022	Last 4 of SSN Required. ✔ Process As-Is
432995	Jennifer Anderson	Mary Anne Johnson	123456			Jadii Castillo	08/10/2022	Last 4 of SSN Required. ✔ Process As-Is
433830	Adam Lancaster	Mary Anne Johnson	123456			Susan Jennings	07/06/2022	Last 4 of SSN Required. ✔ Process As-Is
433830	Adam Lancaster	Mary Anne Johnson	123456			Kali Trombley	06/06/2022	Case Closed. This is a duplicate Case. ✔ Acknowledge

# Authorization Library

The Authorization Library allows you to search a database for a specific authorization.

1. Navigate to “**Authorization Library**” on the left Navigation pane.
2. Type the name of the facility or key word you are looking for.
3. If you find a match, click the down arrow to download a copy of the authorization for patient signature.
  - The form will open on your computer.
  - Save the file to your desired location.



The image displays two screenshots of the myontellus web application interface, specifically the Authorization Library section. Both screenshots show a dark grey header with the myontellus logo, 'CLIENT SERVICES', and user information. The left sidebar contains navigation options like 'My Case Manager', 'My Task List', 'Order Records', 'Unsubmitted Orders', 'SmartOrg', 'Authorization Library', 'My Experts', 'Order Medical Canvass', and 'Order Expert Witness'. The main content area is titled 'Authorization Library' and features a search bar. In the first screenshot, the search bar contains 'central', and the results section 'Forms Matching Your Search' shows a single result: 'CONNECTICUT - The Hospital of Central Connecticut.pdf'. In the second screenshot, the search bar contains 'blue', and the results section shows multiple results: 'ALABAMA - Blue Cross Blue Shield of Alabama.pdf', 'ARIZONA - Blue Cross Blue Shield.pdf', 'CALIFORNIA - Anthem Blue Cross.pdf', 'CALIFORNIA - Blue Shield of California.pdf', and 'GENERAL - Empire Blue Cross Blue Shield.pdf'. Red callout boxes with numbers 1, 2, and 3 highlight the navigation pane, the search bar, and the download icon, respectively.

AUTOMATED RECORD INDEXING & CHRONOLOGY

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### Simplify Records Organization & Accelerate Records Review & Analysis With My.SmartChron

With the click of a button, review records from multiple locations – grouped by record dates, facility name and index categories. A daily notification from this application alerts you when new sets of records are added to your My.SmartChron record indexing and chronology.

#### Features and Functionality

- Automate the Case Chronology Process
- Merge all records into a Single View
- Receive Alerts When New Records Are Added
- Highlight Discrepancies and Missing Pages
- Securely Share Records

#### Benefits

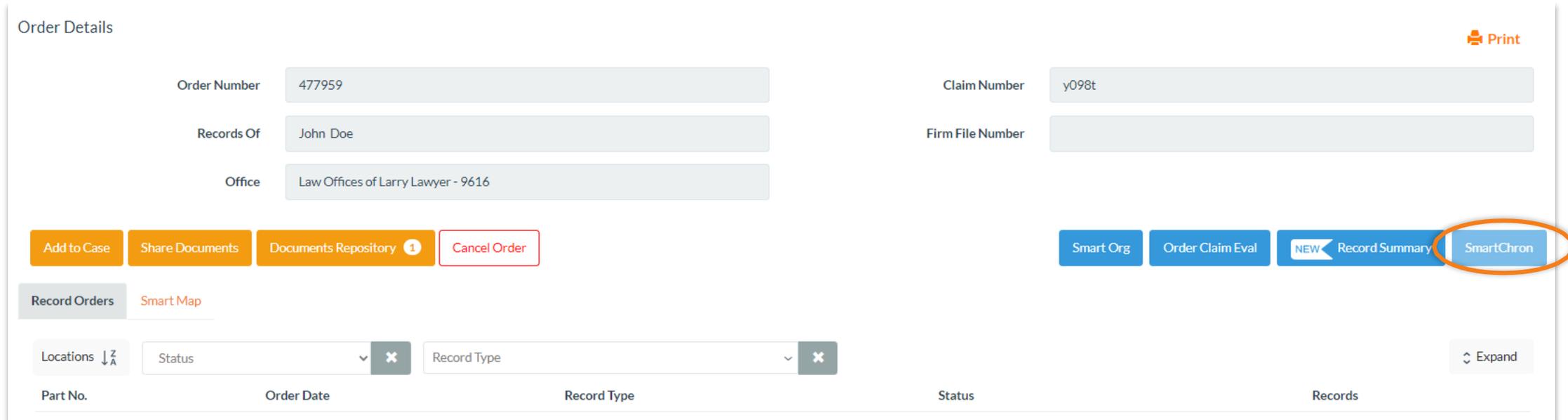
- Reduce Preparation Time – approx. 40 hours per case with My.SmartChron
- Immediate Usability
- A Single View of All Records
- Easy Data Analysis

Learn How You Can  
**Save Approximately 40 Hours Per Case**  
with My.SmartChron

To organize all records on an order into one PDF that has been obtained thus far, providing a clear timeline of documented events, click on the blue **“SmartChron”** button to begin the download. The My.SmartChron will update as new records are obtained.

To download the most recent My.SmartChron:

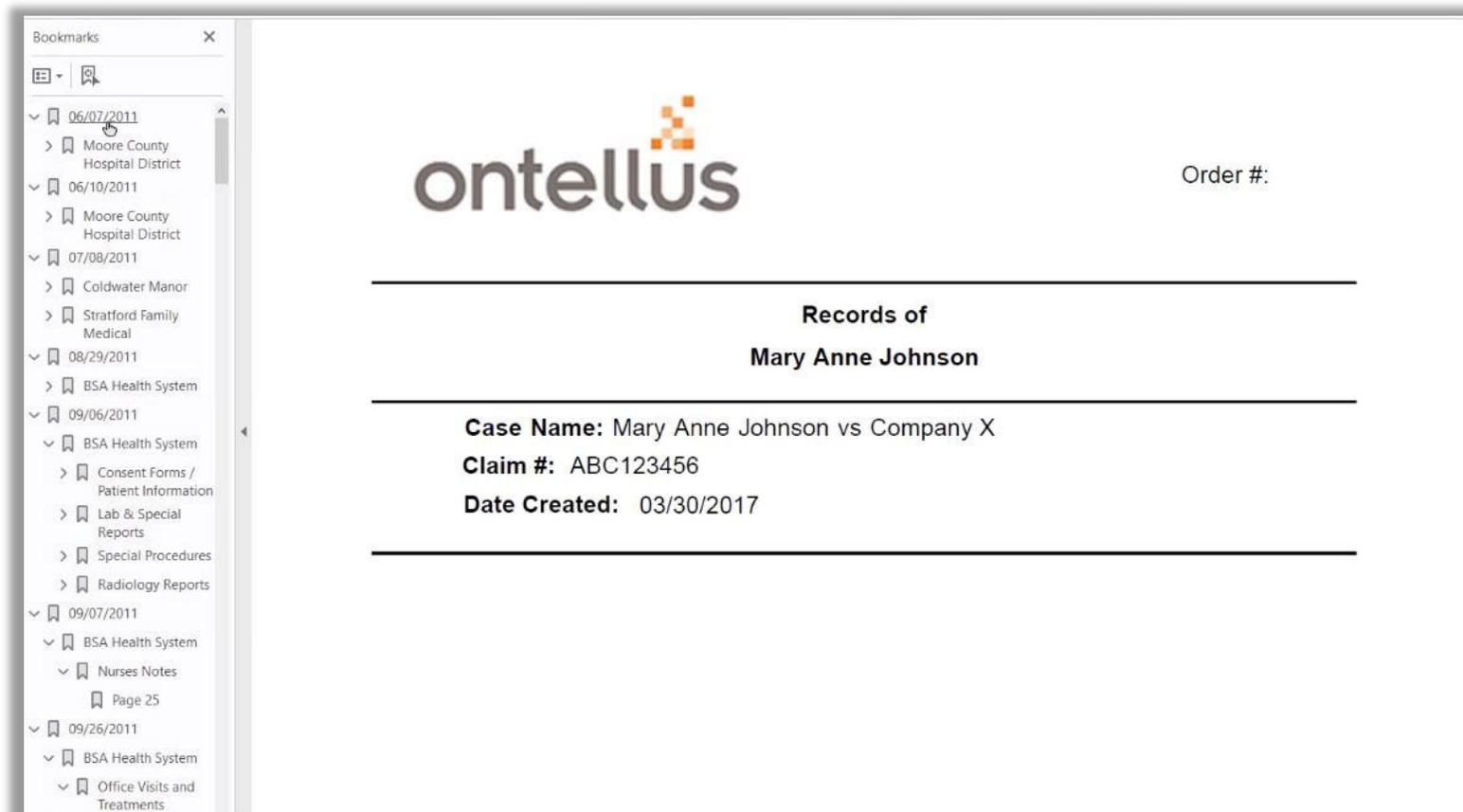
- Navigate to **“My Case Manager”**.
- Locate Order by Order Number, Records Of, Claim Number or Firm File Number.
- Select the **“SmartChron”** button.



The screenshot displays the 'Order Details' section of the My.SmartChron interface. It includes input fields for Order Number (477959), Records Of (John Doe), Office (Law Offices of Larry Lawyer - 9616), Claim Number (y098t), and Firm File Number. Below these fields is a row of action buttons: 'Add to Case', 'Share Documents', 'Documents Repository' (with a notification icon), and 'Cancel Order'. To the right, there are buttons for 'Smart Org', 'Order Claim Eval', 'NEW Record Summary', and 'SmartChron' (which is circled in orange). At the bottom, there are filter dropdowns for 'Locations', 'Status', and 'Record Type', and an 'Expand' button. A table header is visible at the bottom with columns: Part No., Order Date, Record Type, Status, and Records.

My.SmartChron is inclusive of all records on a case/order at any given time and will organize the records by date, location and record type. It's chronologically organized from the earliest treatment date to the most recent, by facility and record type.

Make better decisions faster!



The screenshot displays the My.SmartChron interface. On the left is a 'Bookmarks' sidebar with a search icon and a list of folders organized by date and facility. The main content area features the ontellus logo at the top left and 'Order #' at the top right. Below this, a horizontal line separates the header from the patient information section, which is titled 'Records of Mary Anne Johnson'. Another horizontal line follows, leading to the case details: 'Case Name: Mary Anne Johnson vs Company X', 'Claim #: ABC123456', and 'Date Created: 03/30/2017'. A final horizontal line is at the bottom of the main content area.

Bookmarks

- 06/07/2011
  - Moore County Hospital District
- 06/10/2011
  - Moore County Hospital District
- 07/08/2011
  - Coldwater Manor
  - Stratford Family Medical
- 08/29/2011
  - BSA Health System
- 09/06/2011
  - BSA Health System
    - Consent Forms / Patient Information
    - Lab & Special Reports
    - Special Procedures
    - Radiology Reports
- 09/07/2011
  - BSA Health System
    - Nurses Notes
      - Page 25
- 09/26/2011
  - BSA Health System
    - Office Visits and Treatments

ontellus

Order #:

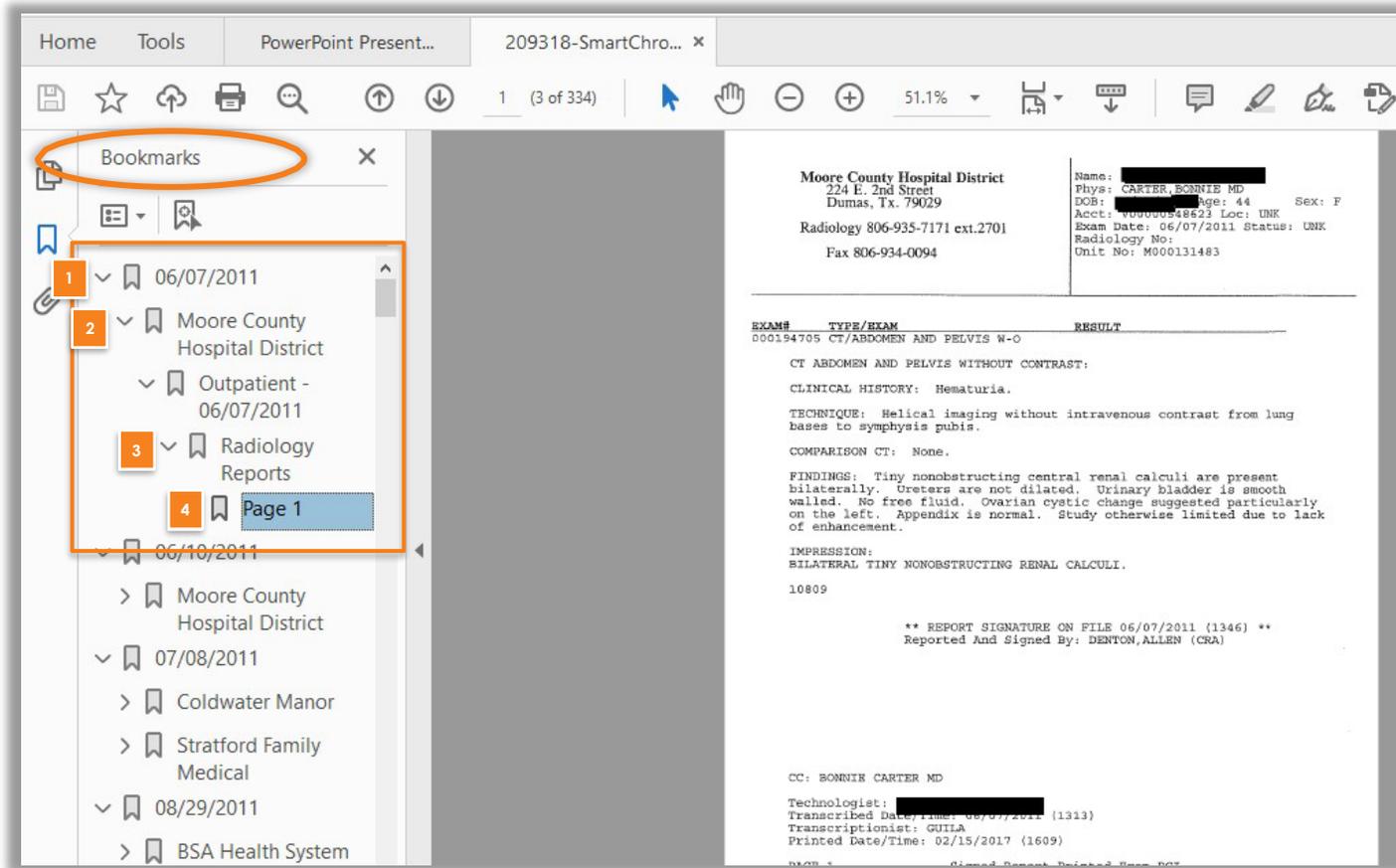
---

**Records of**  
**Mary Anne Johnson**

---

**Case Name:** Mary Anne Johnson vs Company X  
**Claim #:** ABC123456  
**Date Created:** 03/30/2017

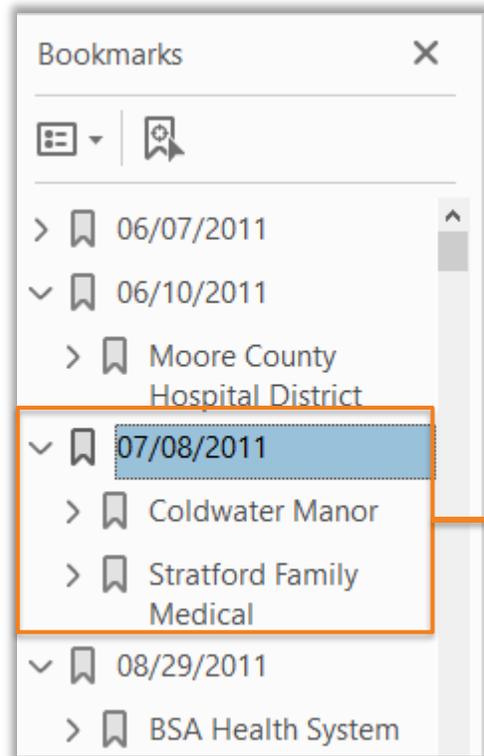
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- The My.SmartChron will show a list of all the records from each of the Record Providers noted at the beginning of the document.
- On the left-hand side under Bookmarks, you can easily view the locations and dates the patient was treated.

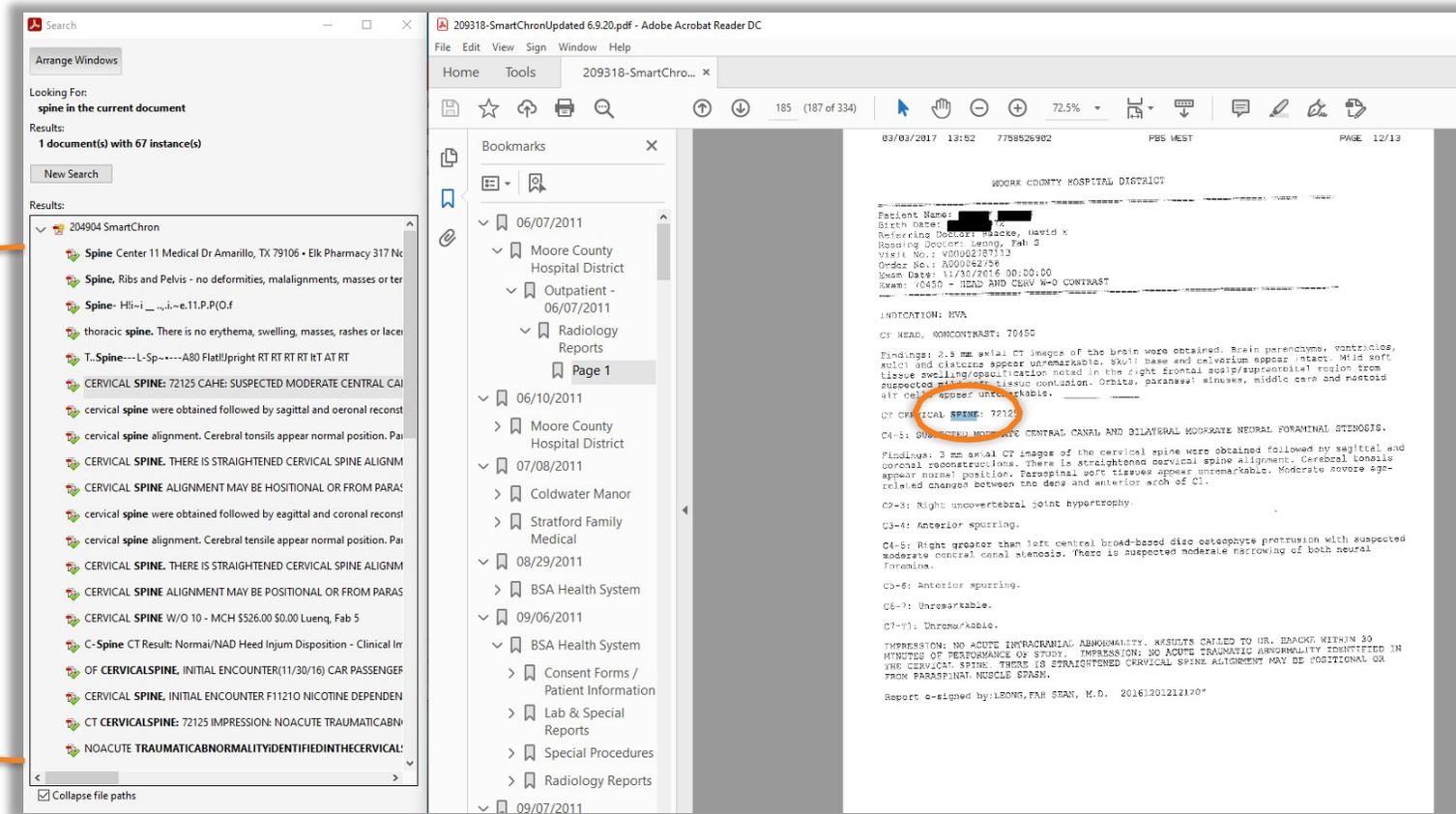
### Identify by:

1. Date of treatment
2. Facility providing treatment
3. Type of record documented from that facility
4. Page numbers within each record type



With My.SmartChron, you can recognize nuances, patterns, trends and conduct a deep data analysis.

- For example, this patient sought treatment at two locations on the same date. ??



Optical Character Recognition (OCR) allows you to see every time a word or phrase is mentioned within a My.SmartChron and the context in which it is mentioned.

- If using Adobe, enable the Smart Search for key words or phrases by selecting **Edit > Advanced Search**.
- Keyboard Shortcut: **Shift+Ctrl+F**
- In the window, type your key word or phrase, then click Search.
- The results will display the context and the total results in which the word or phrase is mentioned within the records.
- Click on one of the matches and it will highlight this instance of the word or phrase within the document.
- Save the file to your desired location and upload the document to your claims management system.

Results are hyperlinked to the page in the records for each occurrence.

VISUALLY IDENTIFY WHERE A CLAIMANT RECEIVED TREATMENT & DOWNLOAD RECORDS FROM A MAP

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### A Visual Map of Facility Locations, Records Ordered & Type of Records

My.SmartMap is a feature within My.Ontellus, a HIPAA compliant, web-based user portal. With My.SmartMap you can view where a claimant received treatment in relation to the proximity of the claimant's address on a map. Users can view the map to identify facility locations of records ordered, view the type of records ordered and, view the records – all with a simple click of a button!

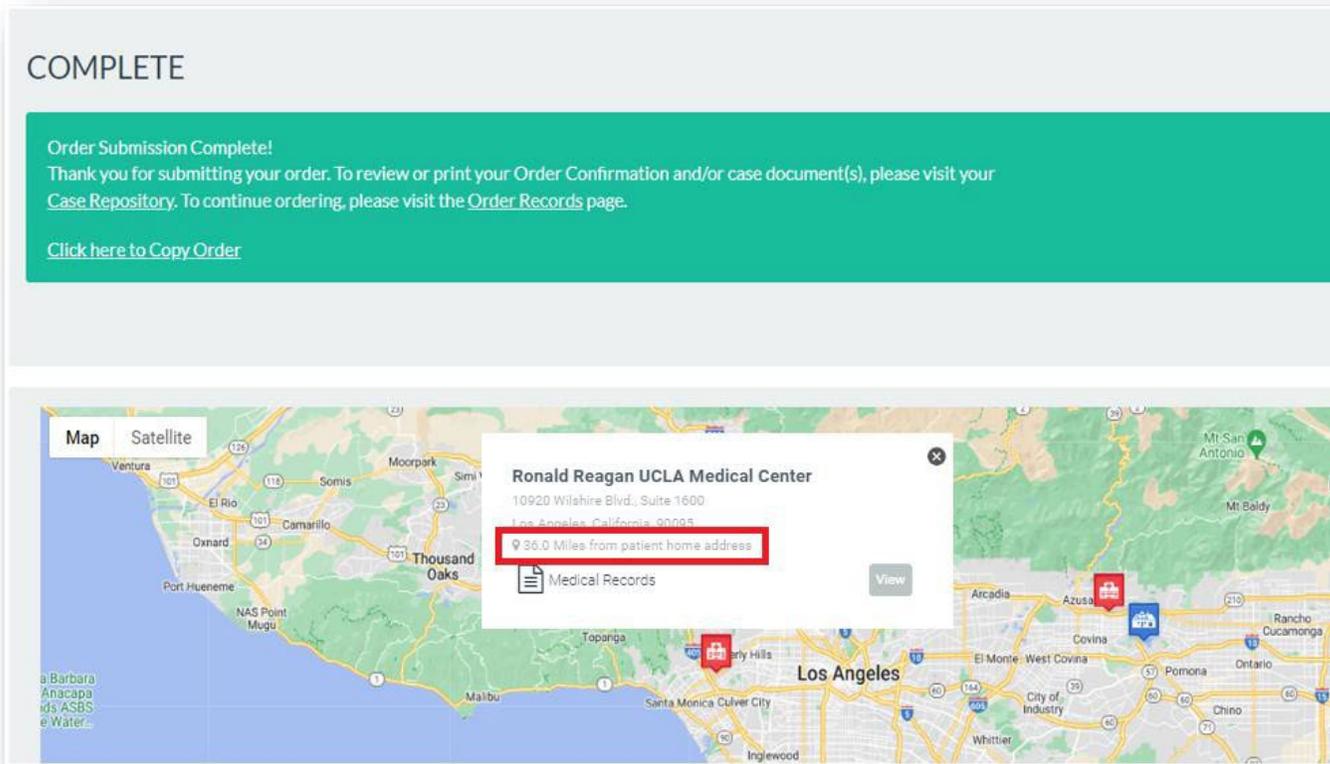
#### Features and Functionality

- Unlimited secure access
- Ability to view facility location name, address and distance from claimant's address and requested record types
- Capability to update claimant's address to accommodate address change

#### Benefits

- Identify where a claimant received treatment and the distance of travel for treatment
- Visually view all the facility locations where records were ordered
- Discover the distance between claimants address and facility location
- View and download records for a specific facility location while viewing the map

At the time you submit your order, you will see a map of all of the locations you just entered from this new order.



# My.SmartMap

## Visually Identify Where a Claimant Received Treatment

You can easily view My.SmartMap of orders through the My Case Manager Screen.

The screenshot shows the My Case Manager interface. The left navigation pane is highlighted with a red circle and the number 1. The main content area shows order details for Order Number 477959, Claim Number y098t, and Records Of John Doe. The 'Record Orders' section has a 'Smart Map' button circled in red with the number 3. Below this, a larger view of the map is shown with a red circle and the number 2, indicating the search and view step. The map displays the United States with red markers indicating treatment locations.

To view the My.SmartMap of orders already placed, go to [My.Ontellus.com](https://My.Ontellus.com) and login with your credentials.

1. Navigate to **“My Case Manager”** on the left Navigation pane.
2. Search and view your cases by Order Number, Records Of, Claim Number or Firm File Number to more easily locate your order.
3. Click the **“Smart Map”** tab.

# My.SmartMap

## Visually Identify Where a Claimant Received Treatment

View all the locations where records have been ordered.

The screenshot displays the My.SmartMap interface. At the top, the client services header includes the Ontellus logo, client manager information (Katherine Werner), and the law office name (Law Offices of Larry Lawyer - 9616, Houston, Texas). A sidebar on the left lists navigation options like 'My Case Manager', 'My Task List', and 'Order Records'. The main content area shows 'Order Details' with fields for Order Number (477959), Claim Number (y098t), Records Of (John Doe), and Office (Law Offices of Larry Lawyer - 9616). Below these are buttons for 'Add to Case', 'Share Documents', 'Documents Repository', 'Cancel Order', 'Smart Org', 'Order Claim Eval', 'Record Summary', and 'SmartChron'. The 'Smart Map' section features a map of the United States with red location markers. A tooltip for 'Dallas Radiology' is visible, showing the address '4230 LBJ Freeway, Dallas, Texas, 75244' and a 'View' button. A search bar at the top of the map area prompts the user to 'Enter the patient address to find the distance between his home and the medical locations.' and includes an 'Update Address' button.

1. Hover over a location to view the name and address of the location along with the distance from the claimant address.
2. View the records available by clicking on "View".
3. Update the Address if the claimant has moved.

## INTELLIGENT RECORDS ORGANIZATION

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## Get Your Records Intelligently Organized with My.SmartOrg

My.SmartOrg brings the antiquated records review process into the digital age with an electronically organized, indexed, bookmarked and searchable set of review-ready records.

### Features and Functionality

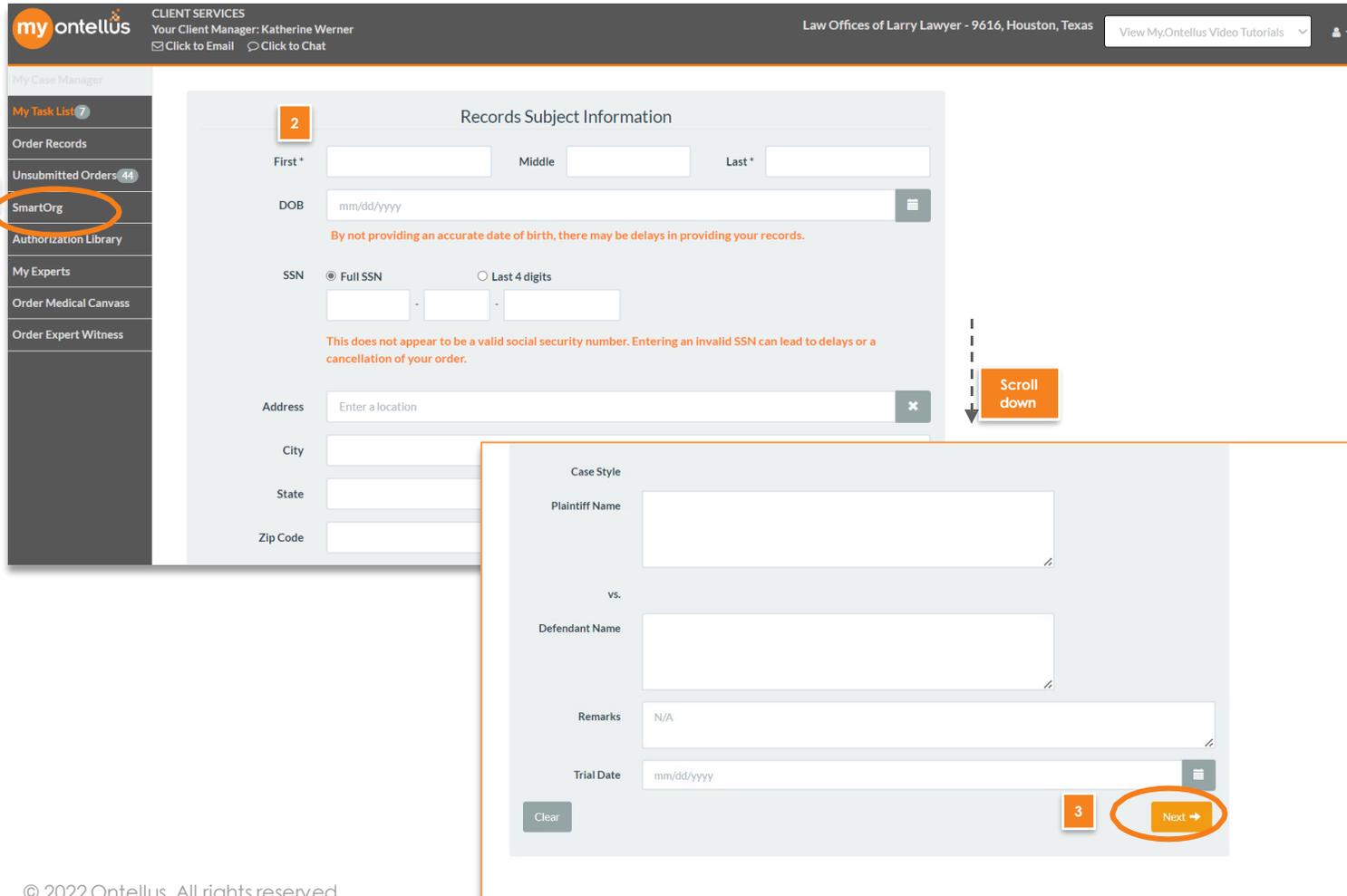
- Include Existing Records In My.Ontellus.com
- Make Your Records Instantly Usable
- Build Consistency into Your Records Library
- (OPTIONAL) Add Your Records to the Case Chronology using My.SmartChron

### Benefits

- Reduce Preparation Time
- Quick usability
- Consistent indexing and processing

**Case Study** – My.SmartOrg Greatly  
Accelerates Time-to Analysis  
For A Malpractice Insurance Company

My.SmartOrg is a process that allows you to upload records you already have for organization and [My.SmartChron](#) generation by Ontellus. Use this feature when there is not a need to send future records requests for the order.



CLIENT SERVICES  
Your Client Manager: Katherine Werner  
Click to Email Click to Chat  
Law Offices of Larry Lawyer - 9616, Houston, Texas  
View My.Ontellus Video Tutorials

My Case Manager  
My Task List 7  
Order Records  
Unsubmitted Orders 44  
1 SmartOrg  
Authorization Library  
My Experts  
Order Medical Canvass  
Order Expert Witness

2 Records Subject Information

First \* Middle Last \*

DOB mm/dd/yyyy

By not providing an accurate date of birth, there may be delays in providing your records.

SSN  Full SSN  Last 4 digits

This does not appear to be a valid social security number. Entering an invalid SSN can lead to delays or a cancellation of your order.

Address Enter a location

City

State

Zip Code

Scroll down

Case Style

Plaintiff Name

vs.

Defendant Name

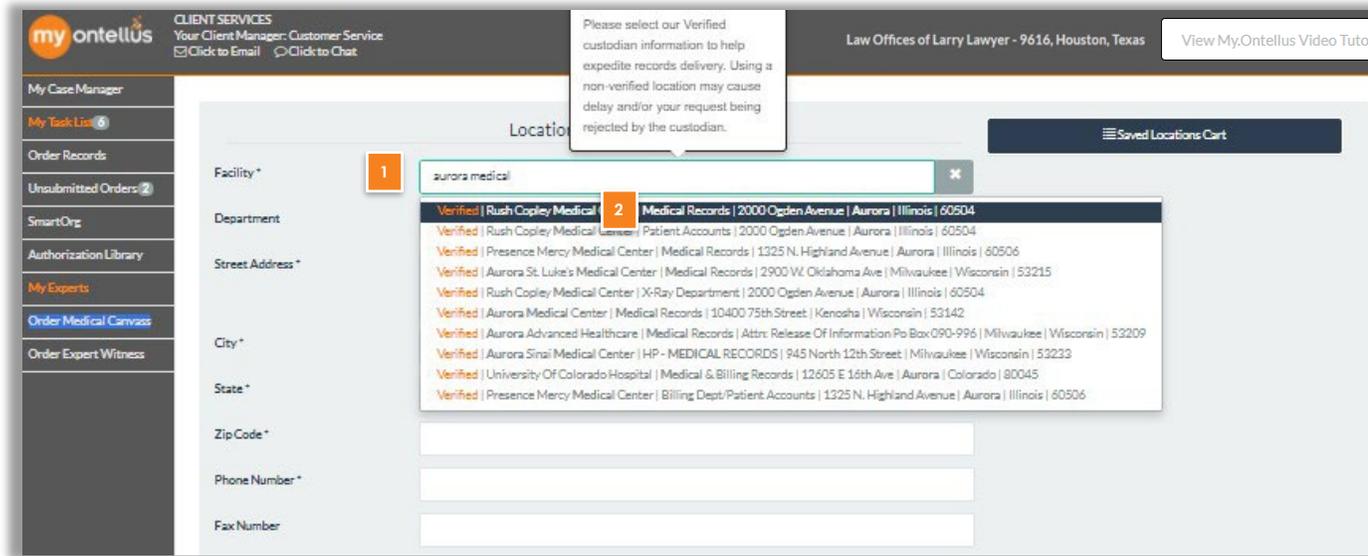
Remarks N/A

Trial Date mm/dd/yyyy

Clear 3 Next →

To place a standalone order using My.SmartOrg, that is not tied to another order/case, go to [My.Ontellus.com](#) and login with your credentials.

1. Navigate to “**SmartOrg**” on the left Navigation pane.
2. Complete applicable fields for the subject.
  - Only the Patient's name is required on this page.
  - You can include additional Records Subject Information.
  - Note: You must enter a full & valid social security number. An invalid SSN can lead to delays or a cancellation of your order.
3. Click “**Next**” to continue.



❖ The Ontellus [My.SmartChron](#) will separate records by location and data so it's important that Ontellus knows the facility of the records you are attaching.

1. To enter the location or facility in which you attaching records from, begin typing the facility name on the Locations Information Page.
  2. As you type, a search will be performed within our database for matching verified providers.
    - Verified Locations are ones that have been researched and the contact information is kept up-to-date by the Ontellus team.
    - To narrow a search, continue typing.
    - Click on the location that matches what you are looking for.
- Note: If there are no matching facilities that populate, all required fields must be entered for the provider.

### Locations Information

**1** Facility \*  
Rush Copley Medical Center

Department  
Medical Records

Street Address \*  
2000 Ogden Avenue

City \*  
Aurora

State \*  
Illinois

Zip Code \*  
60504

Phone Number \*  
630-978-4958

Fax Number  
630-978-6858

**1** Record Type \*  
▼

Please review the information below for completeness & accuracy.  
Revisions after submission may result in order delay & additional charges.

Please click on Upload File to select one set of records to be submitted with the location selected.

#	Name	Document type	Progress
---	------	---------------	----------

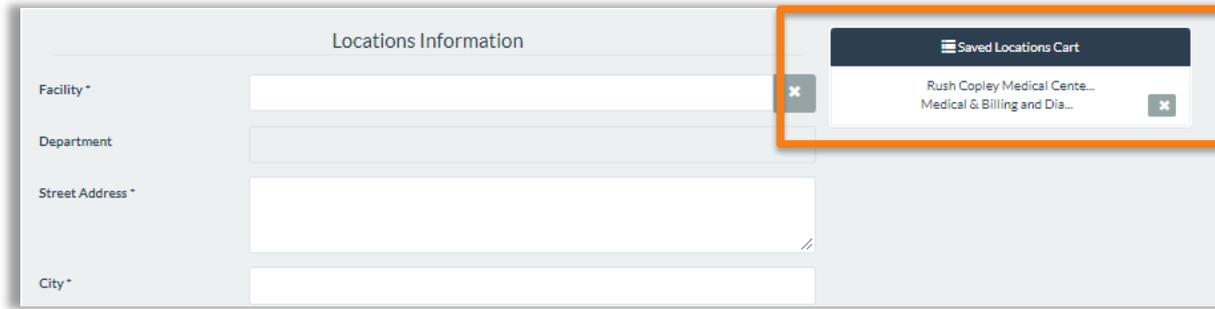
**2** Upload File Add To Cart Clear

← Back **3** Next →

Saved Locations Cart

The required fields will now be completed for the location chosen.

1. Select a **“Record Type”** for the type of document you will be uploading from the provider.
2. Upload the records file by clicking the **“Upload File”** button and locating the file on your computer. This is just like attaching a file to an email.
  - Only PDF file types are accepted to upload.
  - Once the file has been uploaded, you will see **Complete** next to the file name.
3. Once complete, click **“Add to Cart”** to add this location to your My.SmartOrg order.



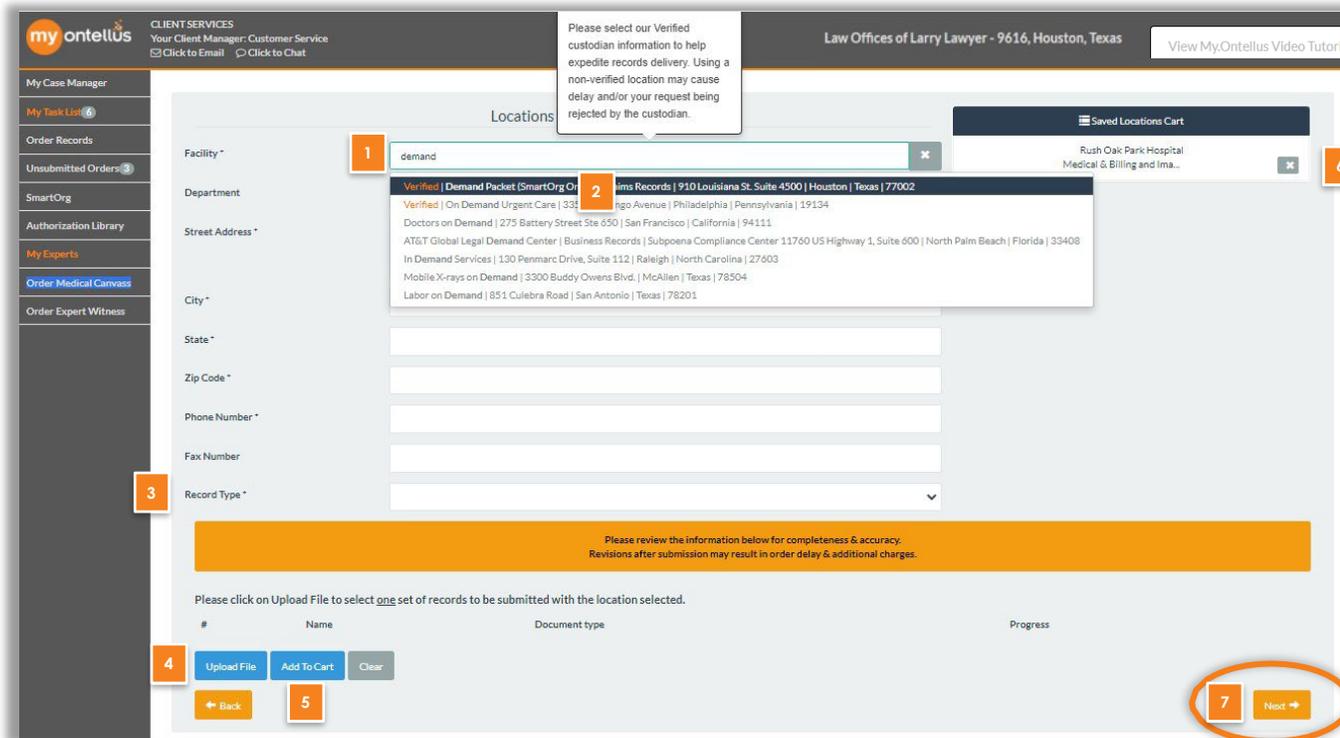
The screenshot shows a web form titled "Locations Information". On the left, there are four input fields: "Facility\*", "Department", "Street Address\*", and "City\*". On the right, there is a "Saved Locations Cart" box. The cart contains one item: "Rush Copley Medical Centre... Medical & Billing and Dia..." with a small "X" icon to its right. The cart box is highlighted with an orange border.

- ❖ You must attach the records separately for each location so they can be organized, indexed and tagged with metadata that enable the [My.SmartChron](#).

- The saved facility will appear on the right-hand side of the screen.
- Continue to add locations from which you have records to upload as described on the previous page.
- To remove a location, click the “X”.
- Once the final location is added to the cart, click “**Next**” at the bottom of the screen.

**IMPORTANT:** If you have records from multiple locations on one file and do not want to break them out by location, please reference the next page.

**IMPORTANT:** If you have records from multiple locations on one file and do not want to break them out by location, please follow these instructions.



Please select our Verified custodian information to help expedite records delivery. Using a non-verified location may cause delay and/or your request being rejected by the custodian.

Facility \* 1 demand

Department 2 Verified | Demand Packet (SmartOrg On Demand) | Claims Records | 910 Louisiana St. Suite 4500 | Houston | Texas | 77002

Street Address \* 3

City \*

State \*

Zip Code \*

Phone Number \*

Fax Number \*

Record Type \* 3

Please review the information below for completeness & accuracy. Revisions after submission may result in order delay & additional charges.

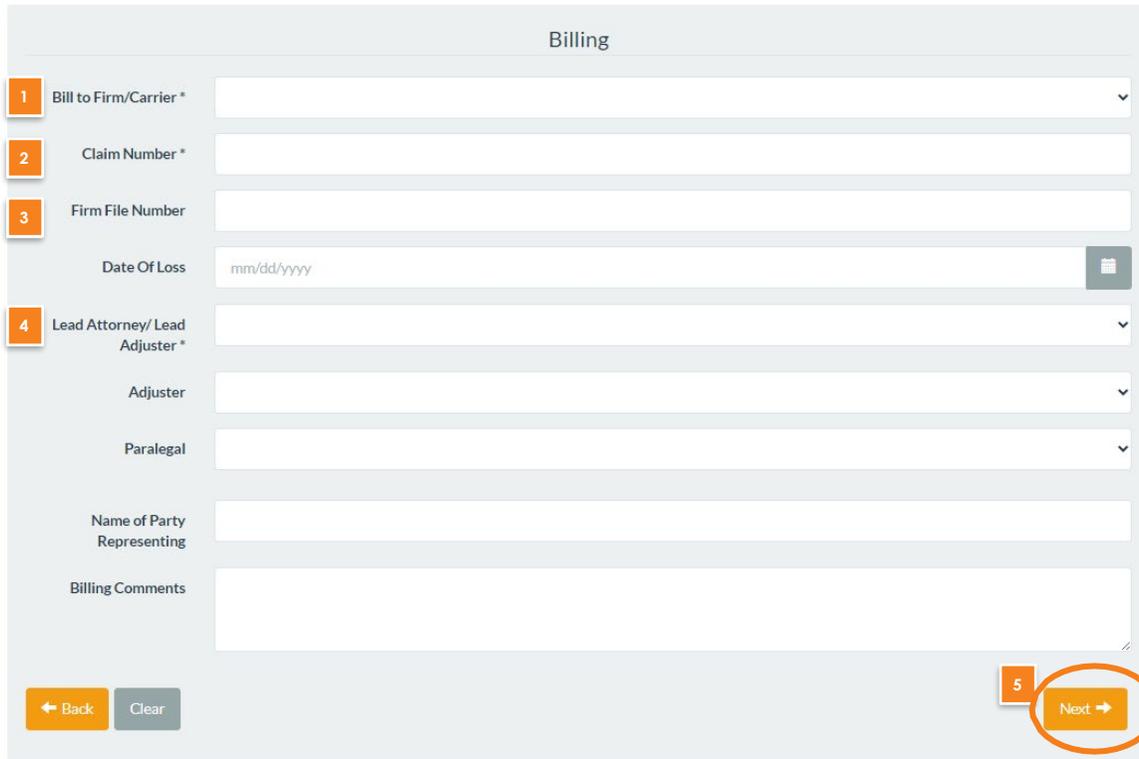
Please click on Upload File to select one set of records to be submitted with the location selected.

#	Name	Document type	Progress
4	Upload File	Add To Cart	Clear

5

7 Next →

1. In the Facility field, type “**demand**”.
2. Select “**Demand Packet**” location.
3. Select a “**Record Type**” for the type of document you will be uploading from the provider.
4. Upload the records file by clicking the “**Upload File**” button and locating the file on your computer. This is just like attaching a file to an email.
  - Once the file has been uploaded, you will see **Complete** next to the file name.
5. Once complete, click “**Add to Cart**” to add this location to your My.SmartOrg order.
6. To remove a location, click the “**X**”.
7. Once the final location is added to the cart, click “**Next**” at the bottom of the screen.



Billing

1 Bill to Firm/Carrier \*

2 Claim Number \*

3 Firm File Number

Date Of Loss mm/dd/yyyy

4 Lead Attorney/ Lead Adjuster \*

Adjuster

Paralegal

Name of Party Representing

Billing Comments

← Back Clear

5 Next →

Complete the Billing Information.

1. **“Firm/Carrier”** name is required and can be selected from the dropdown.
2. **“Claim Number”** is required for cases being billed to a carrier.
  - It's suggested to copy & paste the Claim Number to ensure an accurate Claim Number
3. **“Firm File Number”** enables you to enter a number that is specific to their firm so orders can be easily searched in the My.Ontellus portal.
4. Select the **“Lead Attorney”** or main contact ordering on the case/claim.
5. Click **“Next”** to continue.

**Confirm Order Information**

Please review the information below for completeness & accuracy.  
Revisions after submission may result in order delay & additional charges.

<u>Records Subject Information:</u>	
Business Records:	No
Subject Name:	Ronald McDonald
DOB:	
SSN:	***-**-6789
Address:	
City:	
State:	
Zip Code:	
Case Style:	vs
Remarks:	
Trial Date:	
Rush:	No
<u>Locations Information:</u>	
Facility Name:	Rush Copley Medical Center
Department:	Medical Records
Street Address:	2000 Ogden Avenue
City:	Aurora
State:	Illinois
Zip Code:	60504
Phone Number:	630-978-4958
Fax Number:	630-978-6858
Record Type:	Medical & Billing and Diagnostic
File Attached:	Imaging Documents.pdf
<u>Billing:</u>	
Firm/Carrier:	Bill My Firm - NA Rates - 6852
Claim Number:	1234
Firm File Number:	
Name of Party Representing:	
Adjuster Name/Billing Comments:	
Date Of Loss:	
Lead Attorney:	Larry Lawyer
Additional Attorney:	
Attorney For:	
<u>Authorization to Insert Facility Name(s):</u>	
Authorized:	No

← BackThe Ontellus [Privacy Policy](#) and [Terms & Conditions](#) applySubmit Order

- Review the information entered on the order.
  - You will notice that if you entered an SSN, Full or Partial, the Order Confirmation page only shows the last 4 digits for privacy and confidentially purposes.
  
- Scroll down to the bottom of the page to click “**Submit Order**” for My.SmartOrg Organization.

DOCUMENT SHARING TOOL

---



# My.SmartShare

## Securely Share Records with 3<sup>rd</sup> Party Experts



My.SmartShare is a secure environment that allows for the distribution of claims files to third-party medical experts, including IME's. Enabling users to distribute records along with other documents, My.SmartShare provides insight into the viewing activity of your sensitive PHI.



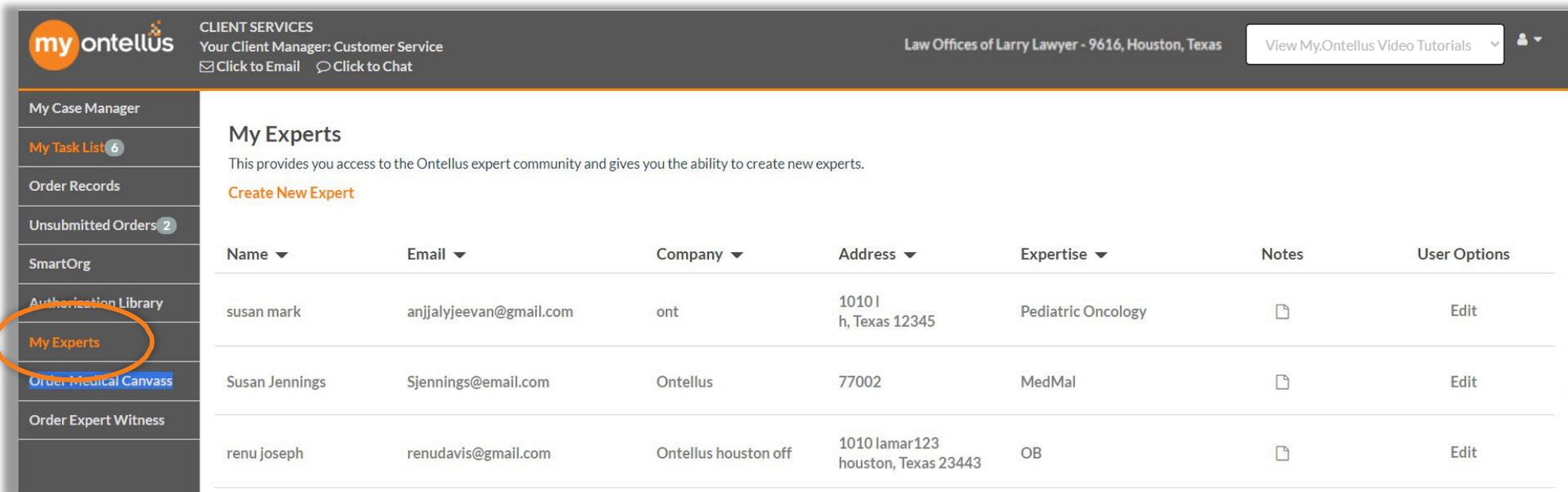
### Features and Functionality

- A secure and protected environment in a HIPAA-compliant, web-based portal.
- Intuitive, user-friendly dashboard that allows for easy and quick adoption.
- Flexibility to share records obtained by Ontellus and documents in your possession (i.e. deposition transcripts).
- The ability to apply “Expiration Dates” to your distribution to limit the length of time sensitive PHI is available for viewing.
- Comprehensive “Viewing Reports” to allow insight into the activity of your third-party Experts.

View How  
[My.SmartShare](#) Works

To share records, go to [My.Ontellus.com](https://My.Ontellus.com) and login with your credentials.

- Navigate to **“My Experts”** on the left Navigation pane.
  - My Experts is an address book to add & manage expert contact information.
- Select **“My Experts”** to:
  - View your firm’s Expert Address Book
  - Create New Experts
  - Manage Expert Contact Information



CLIENT SERVICES  
Your Client Manager: Customer Service  
Click to Email Click to Chat

Law Offices of Larry Lawyer - 9616, Houston, Texas

View My.Ontellus Video Tutorials

My Case Manager

My Task List 6

Order Records

Unsubmitted Orders 2

SmartOrg

Authentication Library

**My Experts**

Order Medical Canvass

Order Expert Witness

### My Experts

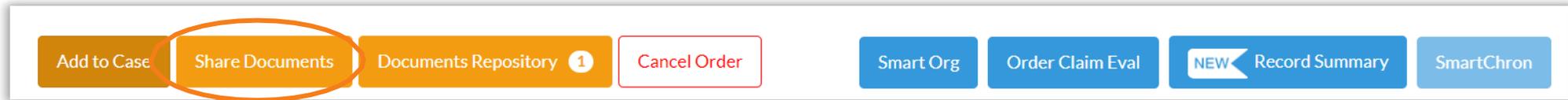
This provides you access to the Ontellus expert community and gives you the ability to create new experts.

[Create New Expert](#)

Name ▼	Email ▼	Company ▼	Address ▼	Expertise ▼	Notes	User Options
susan mark	anjalyjeevan@gmail.com	ont	10101 h, Texas 12345	Pediatric Oncology		Edit
Susan Jennings	Sjennings@email.com	Ontellus	77002	MedMal		Edit
renu joseph	renudavis@gmail.com	Ontellus houston off	1010 lamar123 houston, Texas 23443	OB		Edit

To share records on a case or claim, go to [My.Ontellus.com](https://My.Ontellus.com) and login with your credentials.

- Navigate to **“My Case Manager”** on the left Navigation pane to locate your order/case.
  - Search and view your cases by Order Number, Records Of, Claim Number or Firm File Number to more easily locate your order.
  - Access the My.SmartShare Dashboard by selecting **“Share Documents”** in the Case.



My.SmartShare Dashboard enables users to quickly select:

1. Experts
2. Records to Share
3. DICOM Studies to Share
4. Additional Case Documents to Share

Select “**Submit**” to share the documents to the experts that were chosen.

Ontellus also provides a summary of the documents to be shared and a customizable expiration date.

**Document Sharing**  
Order# 209318 [View Journal Log](#)

**All Contacts**

Name	Address	Email	Company	Expertise
<input type="checkbox"/> Adam Brents	25319 Cheshire Knoll St Katy, Texas 77493	adam.brents1@gmail.com	Brents	ENT
<input type="checkbox"/> Alexis Geiger	60647	alexis.geiger@ontellus.com	AG Company	Know It All
<input checked="" type="checkbox"/> Amanda Jensen	77002	amanda.jensen@ontellus.com	Ontellus	OB/GYN
<input type="checkbox"/> Annette Hernandez	77002	annette.hernandez@ontellus.com	Ontellus	IME
<input type="checkbox"/> Becky Wagoner	77002	rebecca.saur@ontellus.com	Medical Experts Review	Medical expert!

**Records**

Location Name	Address	Document Type	Record Type	Pages
<input type="checkbox"/> Select All Documents				
<input checked="" type="checkbox"/> Advocate Good Samaritan Hospital	3815 Highland Avenue, Downers Grove, Illinois 60515	Records	Medical and Diagnostic Imaging Update	
<input type="checkbox"/> Advocate Good Samaritan Hospital	3815 Highland Avenue, Downers Grove, Illinois 60515	Completed Records	Medical and Diagnostic Imaging Update	27
<input checked="" type="checkbox"/> Alameda Hospital	2070 Clinton Avenue, Alameda, California 94501	Completed Records	Billing Records	260
<input type="checkbox"/> Alameda Hospital	2070 Clinton Avenue, Alameda, California 94501	Completed Records	Medical Records	4

**DICOM Studies**

Location Name	Location Address	Study Description	Study Date	Uploaded Date
No data available in table				

**Case Documents**

Document Name	Description	Document Type	Upload Date
<input type="checkbox"/> Select All Documents			
<input checked="" type="checkbox"/> 1SAMPLE AUTH Single Location.pdf		Authorization	03/01/2022
<input type="checkbox"/> 1SAMPLE AUTH Single Location.pdf		Authorization	03/04/2022
<input type="checkbox"/> 1SAMPLE AUTH Single Location.pdf		Authorization	02/22/2022
<input type="checkbox"/> 1SAMPLE AUTH Single Location.pdf		Authorization	02/22/2022
<input type="checkbox"/> MA Johnson HIPAA release.pdf		Authorization	11/16/2021

Sharing Summary

Sharing  
**1 Contacts**

Documents Sharing  
**4 Documents**

Set Expiration Date  
**09/08/2022**

5 Submit

Ontellus provides a Journal Log, a dashboard of experts accessing documents, and provides this information to clients in real-time.

To view the Journal Log, go to [My.Ontellus.com](https://My.Ontellus.com) and login with your credentials.

- Navigate to **“My Case Manager”** on the left Navigation pane to locate your order/case.
  - Search and view your cases by Order Number, Records Of, Claim Number or Firm File Number to more easily locate your order.
  - Access the My.SmartShare Dashboard by selecting **“Share Documents”** in the Case.
  - Click on **View Journal Log**

Users can also change or revoke access through this dashboard.

- Select **“Change/Revoke”** under *Action* to Change an Expiration Date or Revoke Access.

Journal Log Print

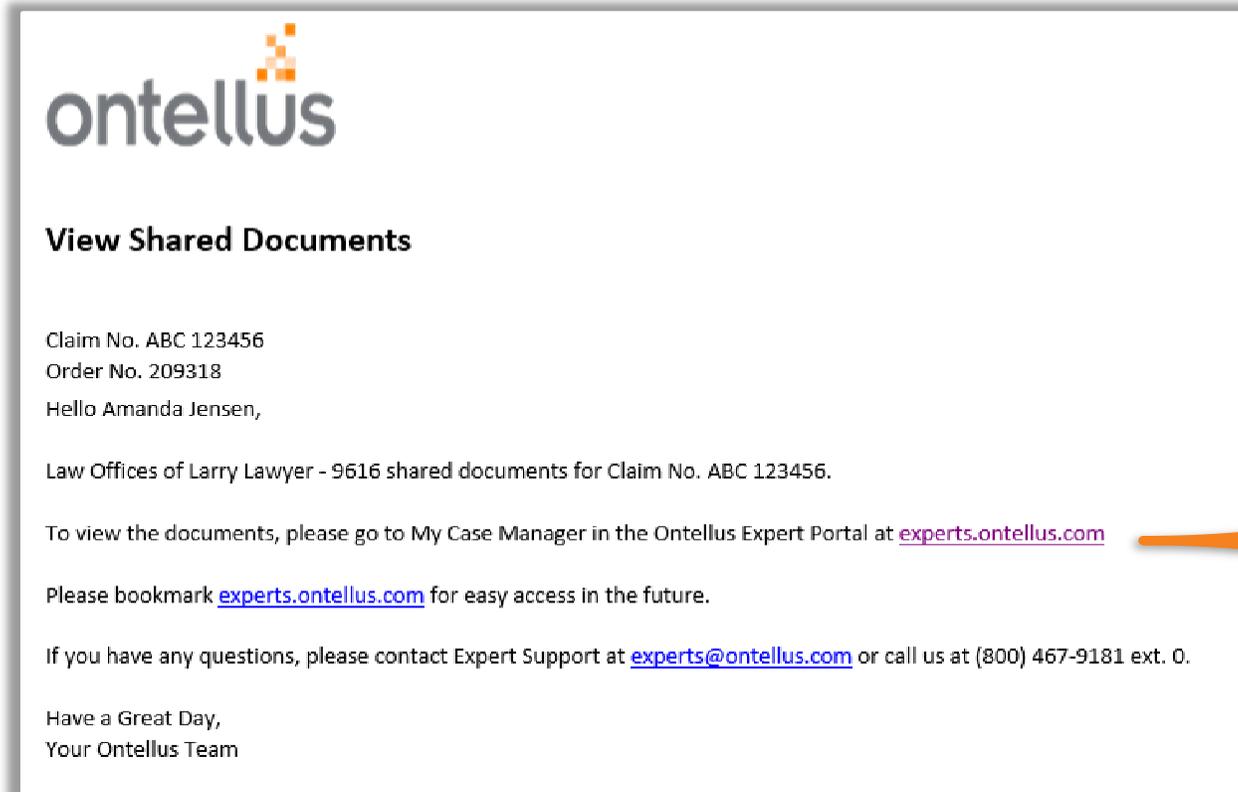
Order Number: 209318 Case Name: Mary Anne Johnson vs. Company X

Records

Expert	Location Name	Address	Record Type	Shared Date	Shared By	Expiration Date	Last Reviewed	Action
Adam Brents	Advocate Good Samaritan Hospital	3815 Highland Avenue, Downers Grove, Illinois 60515	Medical Records	07/14/2020	Larry Lawyer	01/21/2021		Change/Revoke
Adam Brents	Albracht Orthopedic Surgery	8 Medical Drive, Amarillo, Texas 79106	Medical Records	06/16/2020	Larry Lawyer	01/21/2021	06/16/2020	Change/Revoke
Adam Brents	Dr. Paullus / Southwest Neuroscience & Spine Center	11 Medical Dr, Amarillo, Texas 79106	Medical and Billing Records	06/16/2020	Larry Lawyer		06/16/2020	Change/Revoke
Adam Brents	BSA Health System	1600 Health Systems, Amarillo, Texas 79106	Medical Records	06/16/2020	Larry Lawyer		06/16/2020	Change/Revoke

An Expert will receive an email, similar to the below, and a link to login to view the documents.

- An Expert can click the link provided to access the documents.
- The Expert will need to setup their own Ontellus Login to access the documents.



The screenshot shows an email notification from Ontellus. It includes the Ontellus logo, a subject line 'View Shared Documents', and a personalized message to Amanda Jensen. The message provides claim and order numbers, a greeting, and information about shared documents. It includes a link to the expert portal and a note to bookmark the site. Contact information for expert support is also provided.

**ontellus**

### View Shared Documents

Claim No. ABC 123456  
Order No. 209318  
Hello Amanda Jensen,

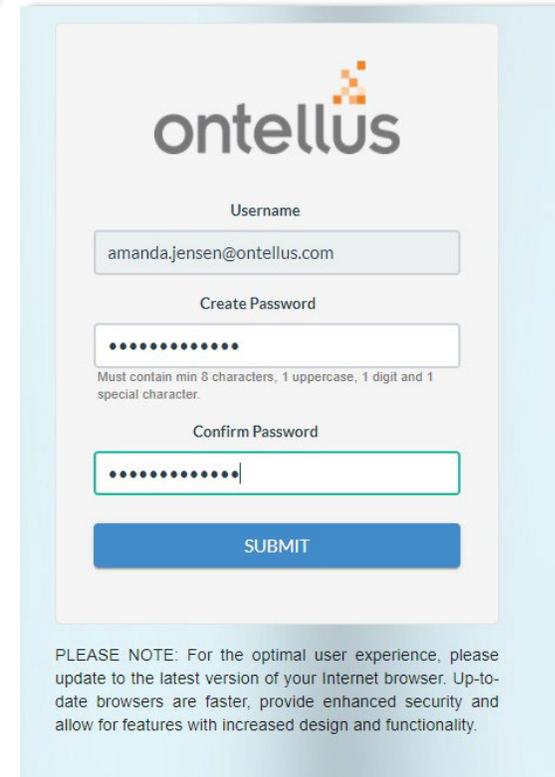
Law Offices of Larry Lawyer - 9616 shared documents for Claim No. ABC 123456.

To view the documents, please go to My Case Manager in the Ontellus Expert Portal at [experts.ontellus.com](https://experts.ontellus.com)

Please bookmark [experts.ontellus.com](https://experts.ontellus.com) for easy access in the future.

If you have any questions, please contact Expert Support at [experts@ontellus.com](mailto:experts@ontellus.com) or call us at (800) 467-9181 ext. 0.

Have a Great Day,  
Your Ontellus Team



The screenshot shows the Ontellus login form. It includes the Ontellus logo, a 'Username' field with the email 'amanda.jensen@ontellus.com', a 'Create Password' field with a password strength indicator, and a 'Confirm Password' field. A 'SUBMIT' button is at the bottom. A note at the bottom of the form provides instructions for optimal user experience.

**ontellus**

Username  
amanda.jensen@ontellus.com

Create Password  
.....  
Must contain min 8 characters, 1 uppercase, 1 digit and 1 special character.

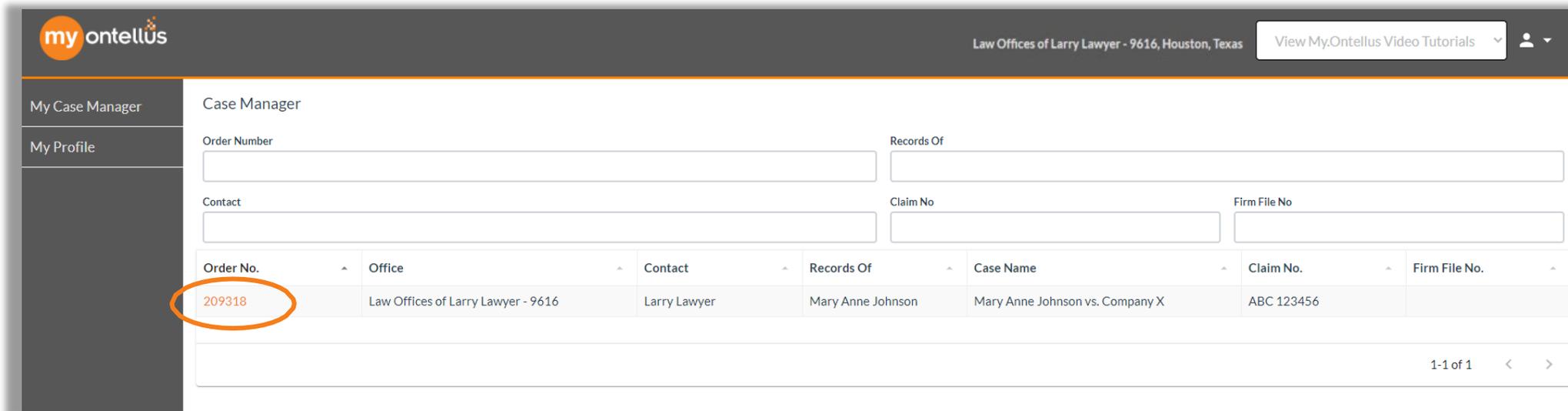
Confirm Password  
.....|

**SUBMIT**

PLEASE NOTE: For the optimal user experience, please update to the latest version of your Internet browser. Up-to-date browsers are faster, provide enhanced security and allow for features with increased design and functionality.

An Expert will be routed to the Case Manager screen.

They will be able to click on the Order No. to view the documents.



Order No.	Office	Contact	Records Of	Case Name	Claim No.	Firm File No.
209318	Law Offices of Larry Lawyer - 9616	Larry Lawyer	Mary Anne Johnson	Mary Anne Johnson vs. Company X	ABC 123456	

An Expert can click on “View” to review any records.

my ontellus Law Offices of Larry Lawyer - 9616, Houston, Texas View My.Ontellus Video Tutorials

My Case Manager  
My Profile

Shared Documents

Order Number 209318 Claim Number ABC 123456

Records Of Mary Anne Johnson Firm File Number

Records

Location Name	Address	Record Type	Upload Date	Shared By	Expiration Date	Last Reviewed	Records
Advocate Good Samaritan Hospital	3815 Highland Avenue,Downers Grove,Illinois,60515	Medical Records	06/18/2020	Larry Lawyer			<a href="#">View</a>
Advocate Good Samaritan Hospital	3815 Highland Avenue,Downers Grove,Illinois,60515	Medical Records	06/18/2020	Larry Lawyer			<a href="#">View</a>
Albracht Orthopedic Surgery	8 Medical Drive,Amarillo,Texas,79106	Medical Records	06/28/2019	Larry Lawyer	02/21/2021		<a href="#">View</a>

1-3 of 3

Case Documents

Document Name	Description	Document Type	Upload Date	Shared By	Expiration Date	Last Reviewed	Records
Ontellus_LOR FAQ draft.doc	Med Records - hospital abc	Other	07/14/2020	Larry Lawyer			<a href="#">View</a>

IMAGE VIEWER TOOL

---



Ontellus' My.SmartView Image Viewer allows the capability of viewing, managing, and distributing radiology diagnostic images from within My.Ontellus.

## Features and Functionality

- Unlimited Secure Access to Diagnostic Images within My.Ontellus portal
- Radiology Standards with advanced capabilities such as:
  - Magnification
  - Windows Leveling
  - Vertical/Horizontal Rotation
  - Measuring
  - Annotation
- Ability to share all or specific images with experts within the My.Ontellus portal via My.SmartShare.

## Radiology Standards Supported in My.SmartView

- Cut cost and storage associated with hard copy films/CD
- Reduce time and expense of shipping films
- Receive instant and secure distribution – allowing for cross-team collaboration, streamlined workflow and alignment of what is being viewed between you and the expert
- View diagnostic quality images without download of software.

1. To view images, navigate to **“My Case Manager”** and locate your order.
  - Search and view your cases by Order Number, Records Of, Claim Number or Firm File Number to more easily locate your order.
2. Click 'View' for the location with the Record Type that contains Diagnostic Imaging.

CLIENT SERVICES  
Your Client Manager: Katherine Werner  
Click to Email Click to Chat

Law Offices of Larry Lawyer - 9616, Houston, Texas

View My.Ontellus Video Tutorials

1 My Case Manager

My Task List 7

Order Records

Unsubmitted Orders 44

SmartOrg

Authorization Library

My Experts

Order Medical Canvass

Order Expert Witness

Order Details

Print

Order Number 477959

Claim Number y098t

Records Of John Doe

Firm File Number

Office Law Offices of Larry Lawyer - 9616

Add to Case Share Documents Documents Repository 1 Cancel Order

Smart Org Order Claim Eval NEW Record Summary SmartChron

Record Orders Smart Map

Locations ↓ Z A Status × Record Type × Expand

Part No.	Order Date	Location	Record Type	Status	Records
2	09/16/2021	Daughdrill General Contracting and Roofing (Westlake, Louisiana) - 303 Mims Rd	Workers' Compensation	Records in Production	View 1
1	09/16/2021	Dallas Radiology (Dallas, Texas) - 4230 LBJ Freeway	Medical Records and Diagnostic Imaging	Records in Production	View 8

2

## RECORDS OBTAINED ✕

<b>Part: 1</b>				
<b>Records Of:</b> John R Smith				
<b>Location:</b> Dallas Radiology				
<b>Record Type:</b> Medical Records and Diagnostic Imaging				
Records	Document Type	Pages	Upload Date	Review Date
 Medical Records	Completed Records	172	09/17/2021	
Study Description	Study Date	Date Uploaded	Date Viewed	
MRI BRAIN WWO CONTRAST	10/30/2015	11/17/2021	11/17/2021	
CT BRAIN W/O CONTRAST	10/30/2015	11/17/2021	11/17/2021	
ANGIO/CAROTID/CEREBRAL/BIL	10/06/2014	11/17/2021	N/A	
US DUPLEX ARM VEIN LEFT	10/04/2014	11/17/2021	N/A	

1. Each image is uploaded as an individual study and shows the following:
  - Study Date – The date the study was performed
  - Date Uploaded – The date that the image was uploaded as a study into My.Ontellus
  - Date Viewed – The last date a user reviewed the study
2. Radiology Standards are supported in My.SmartView including:
  - Film Magnification
  - Windows Leveling
  - Vertical/Horizontal Rotation
  - Measuring
  - And more
3. Open a Study by clicking on the “View DICOM” button.

View the *My.SmartView Image Viewer Tutorial Video* on the My.Ontellus portal to learn about the features and functionality.

ORDER A MEDICAL OR SOCIAL CANVASS

---



# Medical and Social Canvassing

## Uncover and Verify Medical Treatment History For Injury Claims



For over 25 years, INTERTEL has been the nationally recognized leader in medical canvassing. INTERTEL provides the most secure, consistent, and accurate information to the insurance and claims defense industry.

Discover Historical Treatment Data & Social Media Profiles With The Industry's Best-In-Class Service Partner.

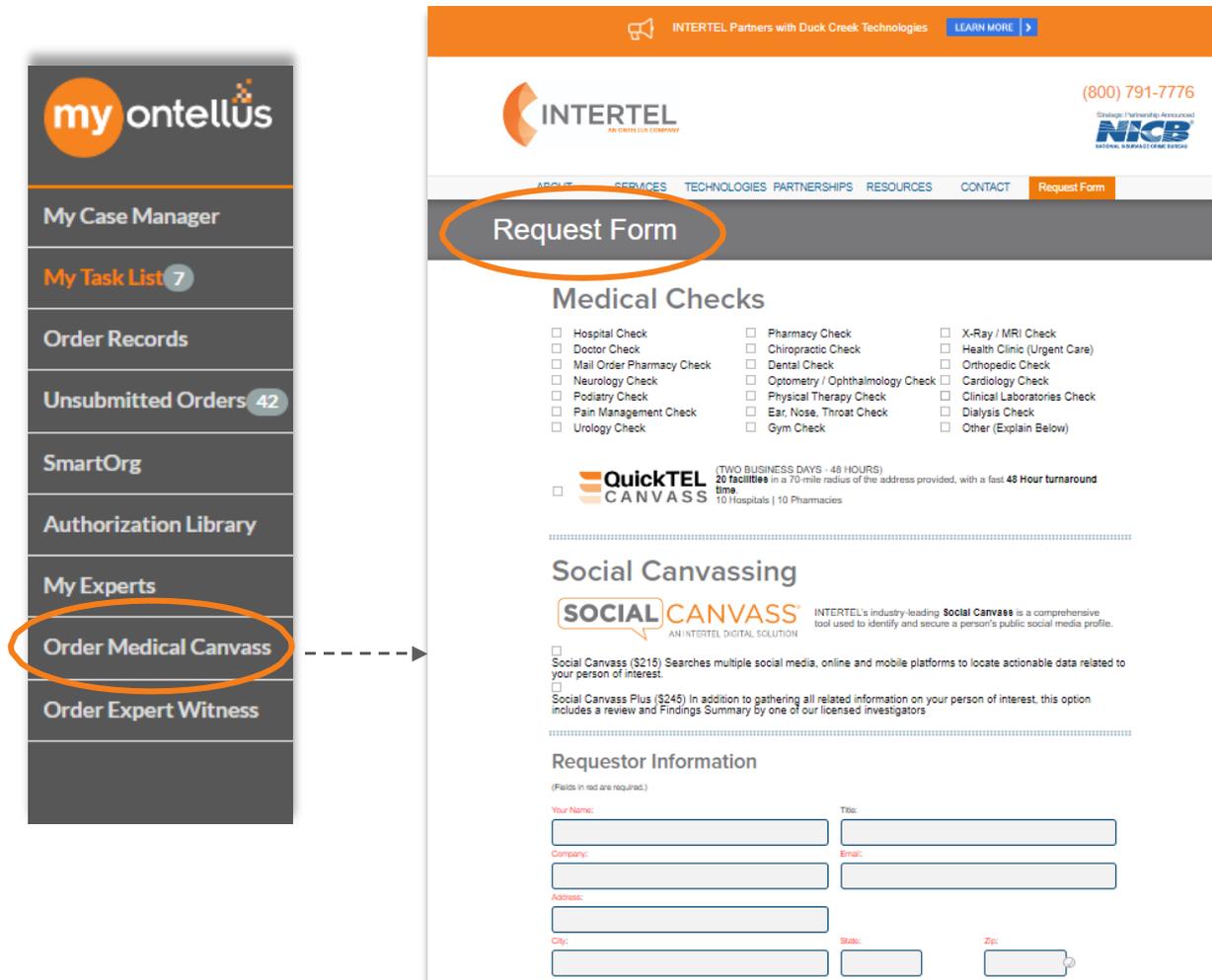
INTERTEL's InsurTech approach collects and analyzes vast amounts of intelligence to deliver actionable medical canvass data with speed and precision.

Learn More About  
[Medical and Social Canvassing](#)



[\*\*A PARTNER YOU CAN TRUST.\*\*](#)

You can easily order medical canvassing and social media intelligence from the My.Ontellus portal.

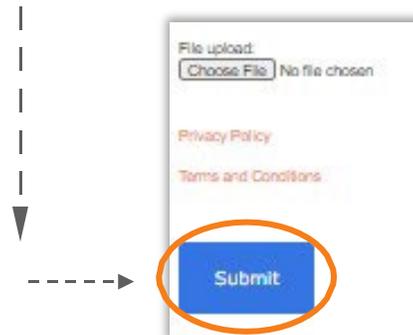


The screenshot shows the My.Ontellus portal interface. On the left is a vertical navigation menu with the following items: My Case Manager, My Task List (7), Order Records, Unsubmitted Orders (42), SmartOrg, Authorization Library, My Experts, Order Medical Canvass (highlighted with an orange circle), and Order Expert Witness. A dashed arrow points from the 'Order Medical Canvass' menu item to the main content area. The main content area is the 'Request Form' page, which is also highlighted with an orange circle. The page header includes the Intertel logo, contact information (800) 791-7776, and a NICB logo. The navigation bar contains links for ABOUT, SERVICES, TECHNOLOGIES, PARTNERSHIPS, RESOURCES, CONTACT, and Request Form. The 'Request Form' page is divided into three sections: 'Medical Checks' with a grid of checkboxes for various services (Hospital, Doctor, Mail Order Pharmacy, Neurology, Podiatry, Pain Management, Urology, Pharmacy, Chiropractic, Dental, Optometry/Ophthalmology, Physical Therapy, Ear, Nose, Throat, Gym, X-Ray/MRI, Health Clinic, Orthopedic, Cardiology, Clinical Laboratories, Dialysis, and Other); 'QuickTEL CANVASS' (TWO BUSINESS DAYS - 48 HOURS) with 20 facilities in a 70-mile radius and a 48-hour turnaround time; and 'Social Canvassing' with a description of the 'SOCIAL CANVASS' solution and two options: 'Social Canvass (\$215)' and 'Social Canvass Plus (\$245)'. At the bottom is the 'Requestor Information' section with fields for Name, Title, Company, Email, Address, City, State, and Zip.

- From the My.Ontellus portal, select **"Order Medical Canvass"** from the left Navigation pane.
- You will be automatically routed to the medical / social canvass request form on Intertel's, an Ontellus Company, website.
- Enter the requested information into the form to request a canvass.

Complete the **Request Form** with the information required.

- Select the appropriate items within the form:
  - Medical Checks
  - Request Records
  - Social Media Canvass
- Complete the Client Information and Claimant Information
  - Fields in **red** are required.
- Click “**Choose File**” to select a file to attach or upload to the request form.
- Click “**Submit**” when complete.



## ORDER A MEDICAL EXPERT WITNESS

---



# Medical Witness Expert

Trust Experience



American Medical Forensic Specialists (AMFS) is the trusted partner for the nation's leading attorneys and medical expert witnesses. After pioneering the field three decades ago, AMFS is continuing to raise the benchmark for expert witness services. Our unparalleled expertise and unmatched support provide our clients with value a referral alone could never deliver.

Request Your Free  
Case Consult [Here.](#)



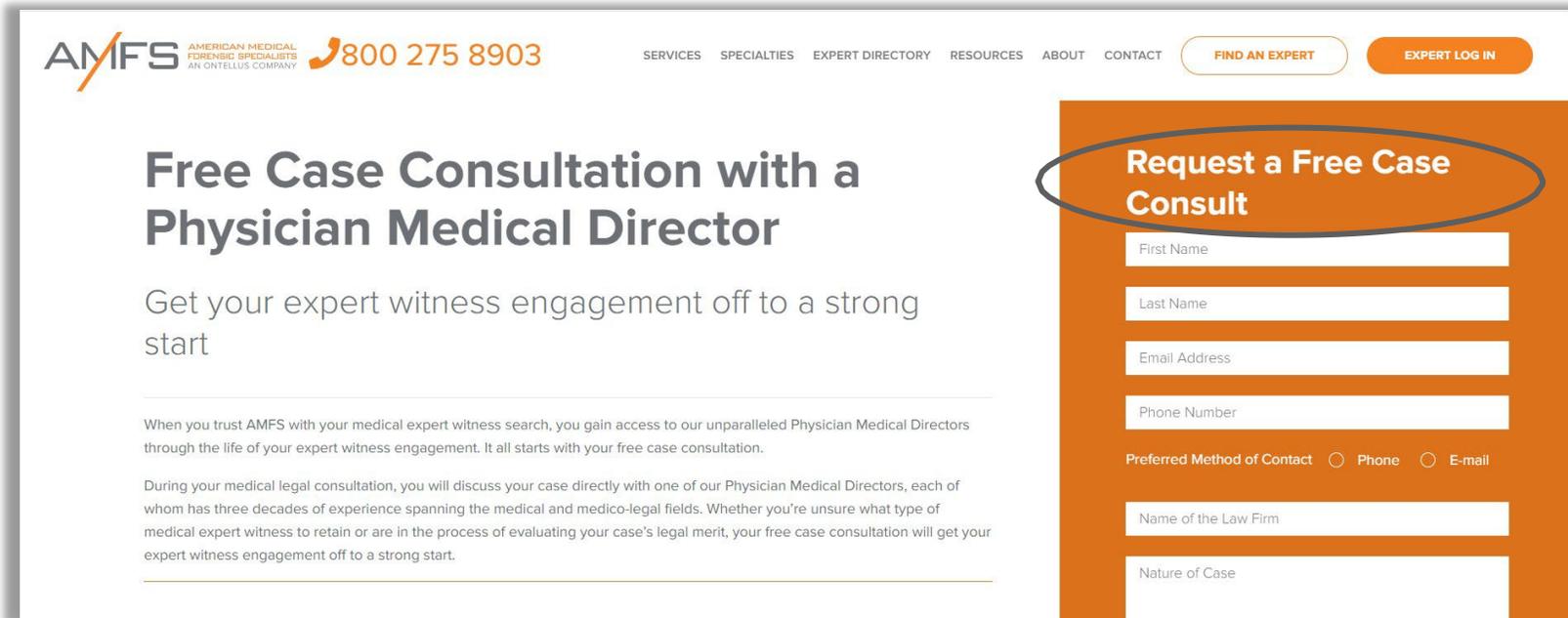
# Ordering Medical Expert Witness



- From the My.Ontellus portal, select “**Order Expert Witness**” from the left Navigation pane.
- You will be automatically routed to AMFS’s, an Ontellus Company, website.
- Click on “**Find An Expert**”.



- Complete the “Request a Free Case Consult”.

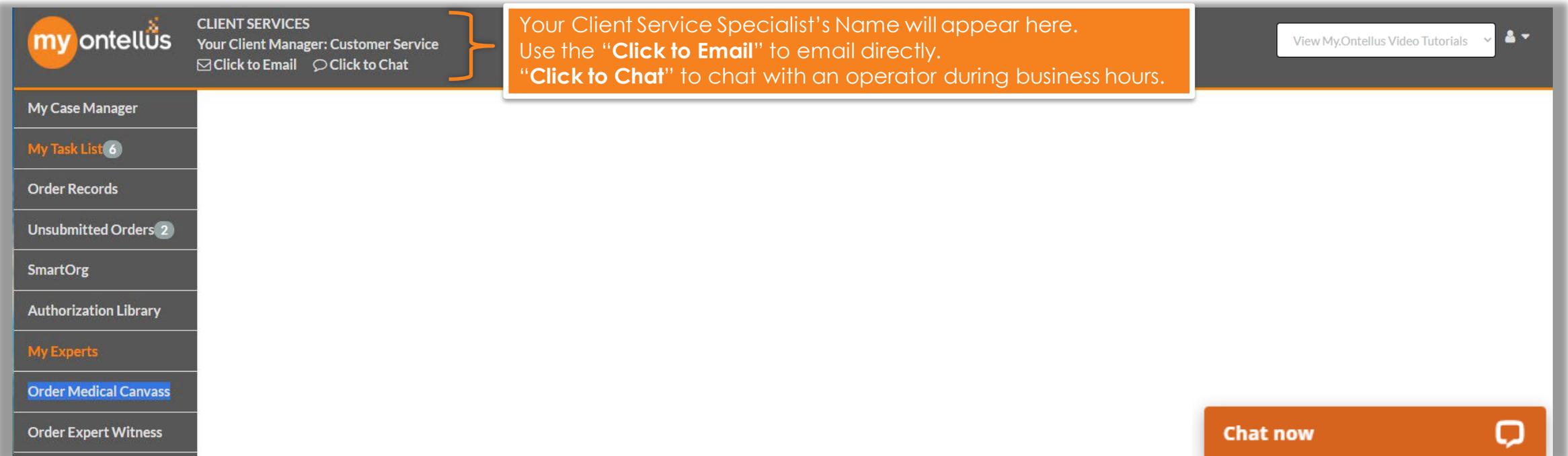


The screenshot shows the AMFS website interface. The header includes the AMFS logo (American Medical Forensic Specialists, an Ontellus company), the phone number 800 275 8903, and navigation links for SERVICES, SPECIALTIES, EXPERT DIRECTORY, RESOURCES, ABOUT, and CONTACT. There are buttons for 'FIND AN EXPERT' and 'EXPERT LOG IN'. The main content area features a large heading: 'Free Case Consultation with a Physician Medical Director'. Below this is a sub-heading: 'Get your expert witness engagement off to a strong start'. Two paragraphs of text describe the service. On the right side, there is a prominent orange box containing the heading 'Request a Free Case Consult' (circled in blue) and a form with the following fields: First Name, Last Name, Email Address, Phone Number, Preferred Method of Contact (with radio buttons for Phone and E-mail), Name of the Law Firm, and Nature of Case.

MY.ONTELLUS PORTAL

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# Customer Service / Help



The screenshot shows the 'myontellus' client services interface. The top navigation bar includes the 'myontellus' logo, 'CLIENT SERVICES', and 'Your Client Manager: Customer Service'. Below this are links for 'Click to Email' and 'Click to Chat'. A left sidebar contains menu items: 'My Case Manager', 'My Task List 6', 'Order Records', 'Unsubmitted Orders 2', 'SmartOrg', 'Authorization Library', 'My Experts', 'Order Medical Canvass', and 'Order Expert Witness'. The main content area is mostly blank. In the top right corner, there is a dropdown menu for 'View My.Ontellus Video Tutorials' and a user profile icon. A 'Chat now' button with a chat icon is located in the bottom right of the main content area.

Your Client Service Specialist's Name will appear here.  
Use the **“Click to Email”** to email directly.  
**“Click to Chat”** to chat with an operator during business hours.

Chat now 

**“Click to Chat”** to chat with an operator during business hours.

# Records Retrieval Tools

Your One Ultimate Solution For Records Retrieval And Document Management



Simple & Secure Records Retrieval Portal.

[Learn more here.](#)



Simplify Records Organization & Accelerate Records Review & Analysis with My.SmartChron.

[Learn more here.](#)



Get Your Records Intelligently Organized with My.SmartOrg.

[Learn more here.](#)



Securely Share Records with My.SmartShare.

[Learn more here.](#)



Easily Access, View and Download Radiology Diagnostic Images.

[Learn more here.](#)



Streamline Your Records Retrieval & Claims Integration with AddOntellus.

[Learn more here.](#)

# Records Retrieval Tools

Your One Ultimate Solution For Records Retrieval And Document Management



## foreign subpoenas

What is a Foreign Subpoena?

[Learn more here.](#)

## Summary & Analysis

Record Summary & Claim Evaluation Tools

[Learn more here.](#)

## AMFS American Medical Forensic Specialist

The nation's leading attorneys and medical expert witness services

[Learn more here.](#)

## INTERTEL Medical and Social Canvassing

Medical and Social canvassing is one of the few ways to uncover and verify medical treatment information for a claim.

[Learn more here.](#)

## Frequently Asked Questions

Answers to the most frequently asked questions by carriers and internal users.

[FAQ's](#)