Add a Quick Order

What is it?

A quick order is a faster way for clients to enter a Record Retrieval order in ROS when an order document already exists. A Quick Order is 4 steps as compared to an 8-step standard order. For a quick order to be submitted you must include a document that contains subject, facility, and scope information to be requested.

For any questions or feedback regarding ROS, Record Retrieval, or adding a quick order please reach out to your account manager.

1. After you **log in to ROS**, click the **Order Records** title within the sidebar menu and select **"Add Quick Order"**
2. Confirm the **Ordering Company** information, designate an **Ordering Attorney** and **Attorney For** selection, then enter the **Client Name**, choose an **Ordering Contact**, and enter a **Cause Number**, if available.
3. Still within Step 1 – **Ordering Party**, select or deselect what events the listed contacts will receive **email notifications** for in the Notifications table. If there is a contact not listed that should be notified by one or more events, use the link above the table to **Add Contact(s) for Notifications** and click **Next** when complete.
4. Within Step 2 – **Billing,** confirm or select the **Billing Company** and **Billing Contact**, then enter a claim number if you have one. Click **Next** when complete to move on.
5. In ROS Step 3 – **Documents** you will upload all request documents that should be used for record retrieval. This will include a document that contains the subject and subject's information, facilities with record types, along with date range and scope information. Any signed authorizations, letters of authority, death certificate, etc. also need to be uploaded to the documents step using the **Upload File(s)** button. Select the files from your computer then select a **Document Type** from the dropdown menu in the documents table that most closely reflects each uploaded document and press **Next** when complete.
6. In Step 4– **Summary,** review and edit any information where needed and enter any additional notes that need to be captured in the **Notes** field then click **Submit**!