Add a Standard Order

What is it?

A standard order is the standard way for clients to enter a Record Retrieval order in ROS. The standard order is broken down into 8 main steps or categories of information to be entered for Lexitas to retrieve records.

For any questions or feedback regarding ROS, Record Retrieval, or adding an 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 Order"**
2. Choose or confirm the Service Selection is "**Record Retrieval**" and click the orange **Next** button
3. 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.
4. 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.
5. 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.
6. In ROS Step 3 – **Other Counsel** you can enter the counsel of record in the case by using the **Add Counsel** button and completing the information in the popup window. You can also add **Other Contacts** to include insurance adjusters, experts, or other interested parties to the case by using the **Add Contact** button above the contacts table on this step. Once complete or if other counsel/other contacts are not needed on this case, click the **Next** button to move forward.
7. Select if the case is a **Filed Case or Pre-Suit** which will prompt the next fields for entry in ROS- Step 4 Case Information. Enter the information accordingly and then move on to Step 5 by clicking the orange **Next** button.
8. Enter the **Subject/Request** information by first clicking the orange **Add Subject** button above the table. In Step 1 of the popup window, you will enter at minimum the Subject Type, First Name, and Last Name. You should also enter the subject DOB, DOD, SSN, and additional fields if available.
9. In Step 2 of Add Subject & Facilities you will first search for the facility to order records from using the orange **Search** button to locate the necessary facility and confirm the address. If the facility with the proper address does not exist in the database, you can add a new entry by clicking the **Add New Facility** link at the top of the Step 2 window. Once the facility is located, **click the checkbox in the Add column** and **select one or more record types** from the dropdown menu for that facility. Repeat until all facilities with record types have been added for each subject.
10. Still within Step 5 – Subject/Requests, select the **Request Type** and **Service Type** for each request # using the dropdown menus in the table then click **Next**.
11. In Step 6 **– Scope**, choose the Subject then select a Request # to define the scope to be used for record retrieval. Select a scope template, define a date range, and then customize the text being used for each scope, if needed. Press **Save Scope** when each scope entry has been completed until all Request #s have a green checkmark in the table. Click **Next** to move on to Step 7.
12. Upload any and all request documents in Step 7- **Documents** that should be used for record retrieval. This will include signed authorizations, letters of authority, death certificate, etc. Use the **Upload File(s)** button to select the files from your computer then select a **Document Type** from the dropdown menu that most closely reflects each uploaded document and press **Next** when complete.
13. In Step 8 – **Summary,** review and edit any information where needed, enter any additional notes that need to be captured in the **Notes** field and click **Submit**!

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