Add a Record Insights Order

What is it?

A Record Insights order is a user-friendly chronological medical report that includes a summarized medical history and allows the user to search and filter information by medical condition, date, body system, and more.

For any questions or feedback regarding ROS, Record Insights, 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 the Service Selection "**Record Insights**" and click the orange **Next** button
3. In ROS Step 1 - 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 – **Case Information** you can enter the Client Matter Number, Date of Incident, Plaintiff Caption, and Defense Caption, if available. The fields for case information are not required if you do not have it. Click the **Next** button to move on to Step 4 – Subject(s).
7. **In the Subject(s)** step, enter the subject information by first clicking the orange **Add Subject** button above the table. In the popup window, you will enter at minimum the subject First Name and Last Name. You should also enter the subject DOB, SSN, and additional fields if available. Click **Next** after the subject(s) have been added.
8. In **Step 5- Record Insights,** first click the orange **Create Record Insights Summary** button at the top of the page. In the Step1 window, select the subject and then select the Record Insights Preferences from the dropdown menu and click next to move to Step2. In Step2 of Create Record Insights Summary you will click the **Upload Files** button to select and upload all documents to be included in the Record Insights medical summary. Once all documents for the Record Insights summary have been uploaded, click **Submit** in the Step2 window. Repeat the process for any additional subjects, if needed and click **Next** to move forward.
9. In Step 6 – **Summary,** review and edit any information where needed, enter any additional notes that need to be captured in the **Notes** field, and click **Submit**!