ChartRequest

Step-by-Step Patient Walkthrough

September 2021

Thank you for being a valued ChartRequest partner.

This guide provides a walkthrough of the patient requestor workflow. Please review and reference this document when assisting patients as they request their medical records.

As always, feel free to contact our support team with questions at support@chartrequest.com

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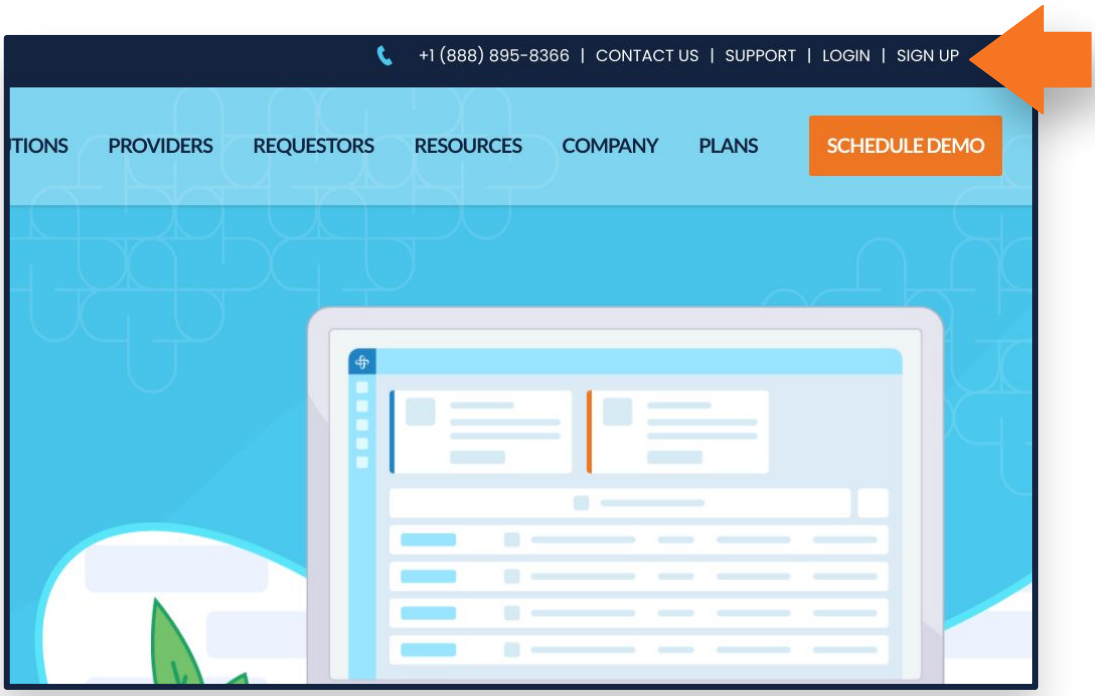
Step 1

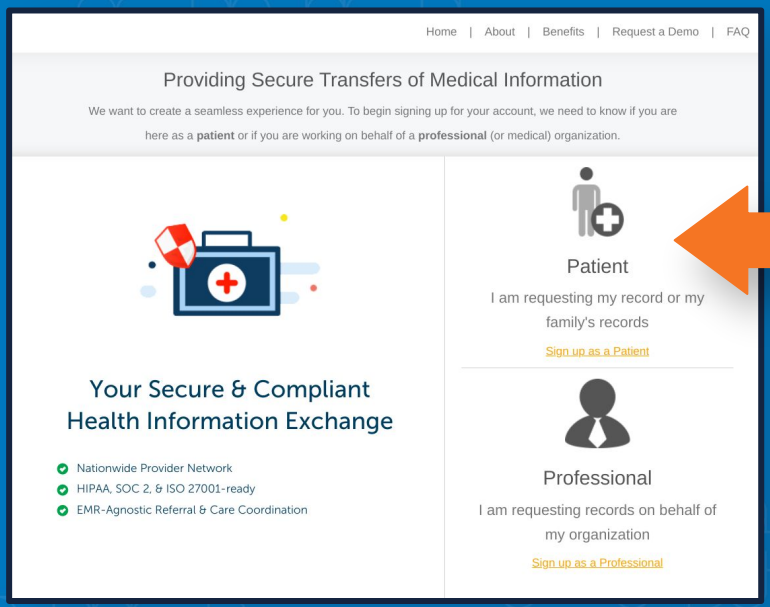
In your web browser, go to www.chartrequest.com.

Select “Sign Up” located in the top-right corner of the page.



Step 2

Click “Sign Up as a Patient” and complete your registration.



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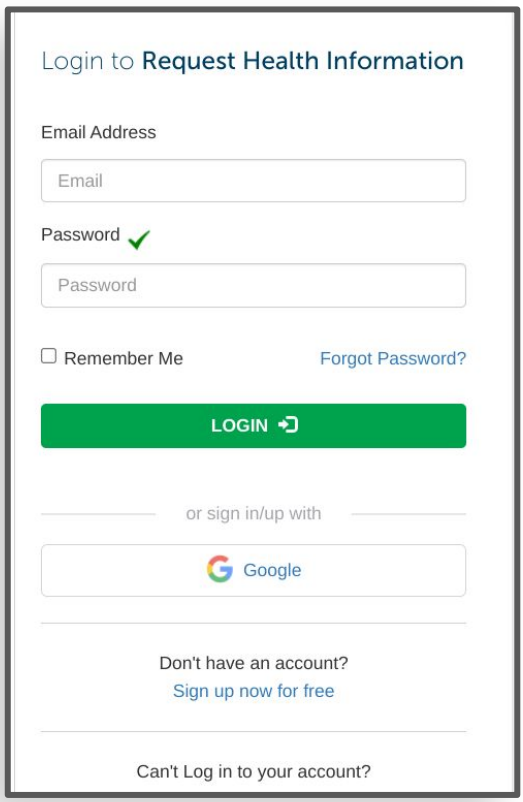
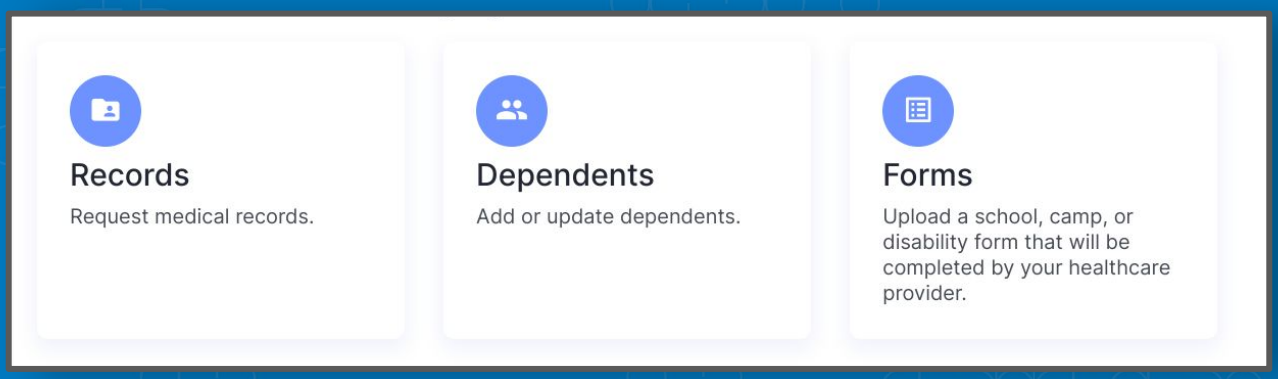


Step 3

Once registered, log in to ChartRequest by going to app.chartrequest.com/login and enter the username and password you've created.

Step 4



Once signed in, please select the type of request you would like to make - **Records, Dependents,** or **Forms**. This guide will walk through the Records Request workflow.

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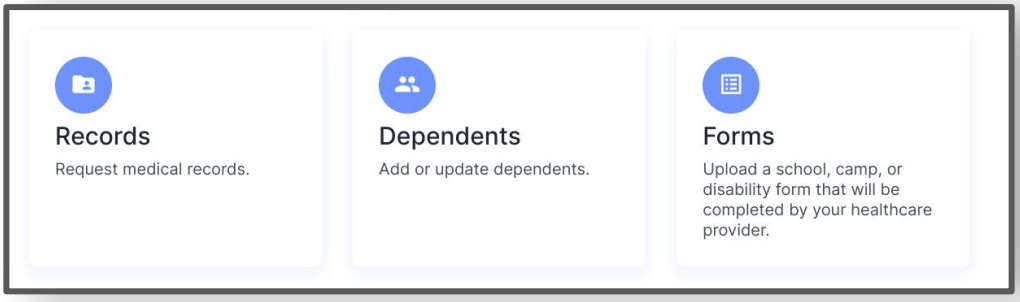
Step 4



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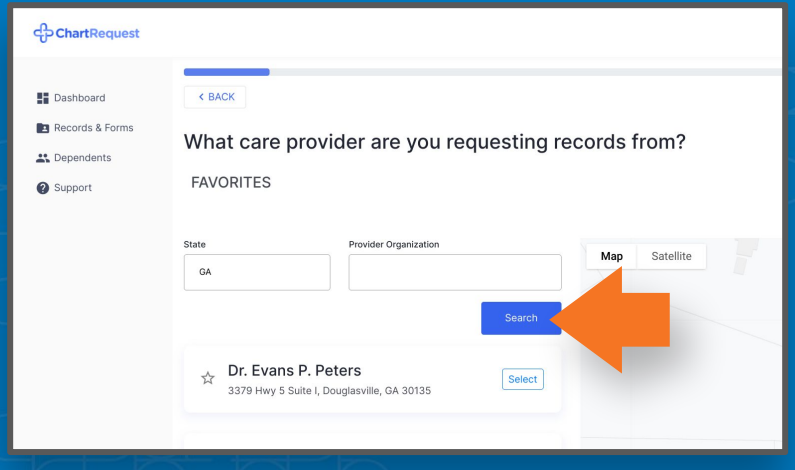
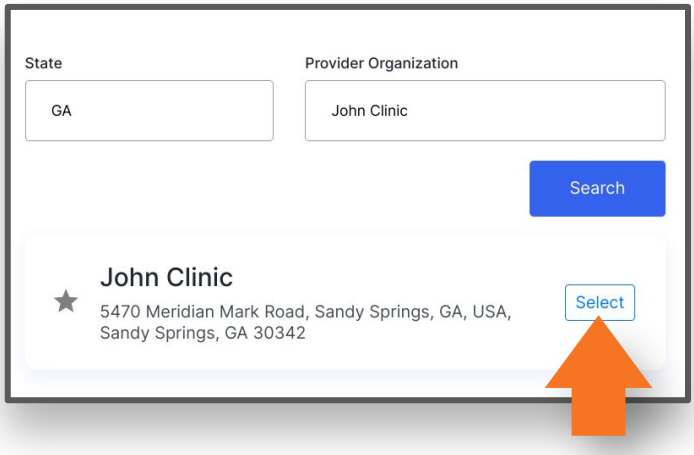


Step 5

Next, search for your provider. Type in the “State” and “Provider Organization” and click “Search”.

Step 6

Once you’ve located the intended provider, click “Select” to choose the Provider Organization.



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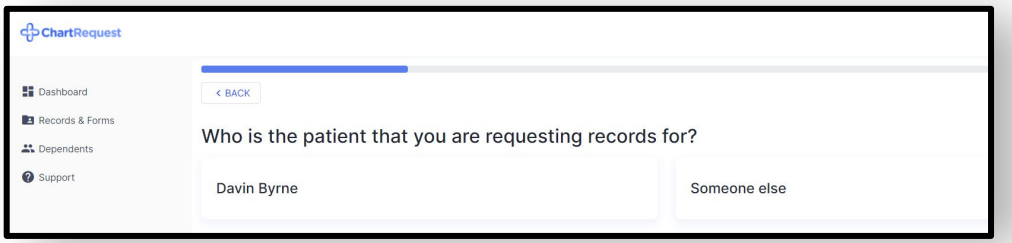
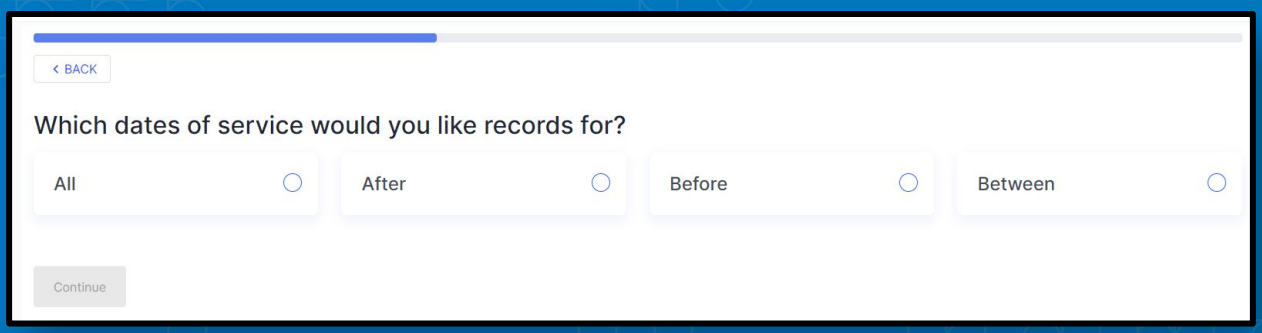
Step 7



Next, please select who you are requesting records for. You may choose yourself or someone else.

Step 8

Next, select the dates of service you would like to retrieve records from. There are 4 options, and a calendar will appear when you select any option except “All.” The options are as follows:



All - This will request all of the individual’s records from this provider.

After - This will select only the dates of service after the selected date

Before - This will select only the dates of service before the selected date

Between - This will select only the dates of service between two selected dates

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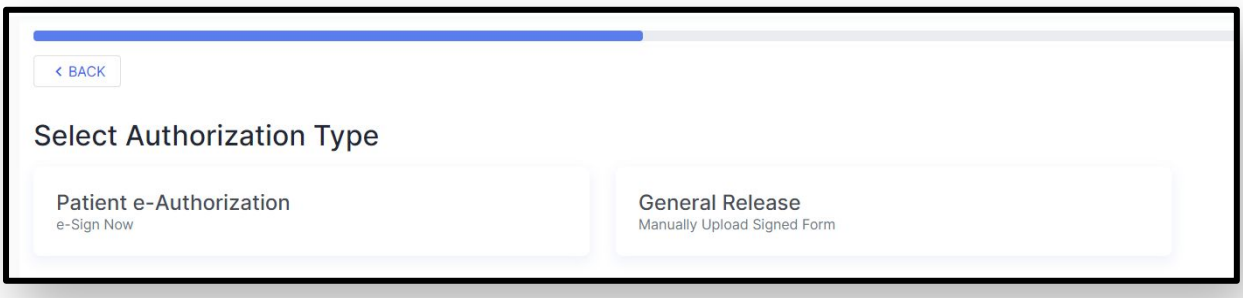
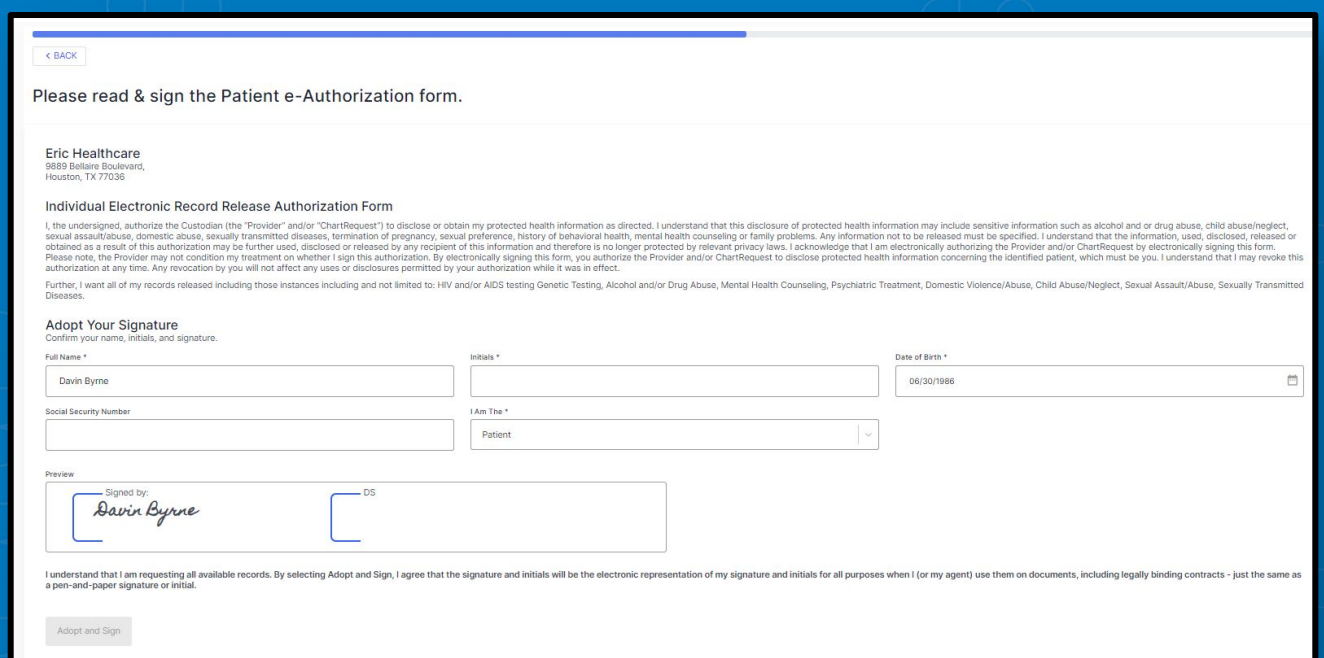
Step 9

Next, select an Authorization Type. The Patient e-Authorization is available to e-sign. You can also upload other types of forms by selecting “General Release.”



Step 10

If you choose “Patient e-Authorization,” you will be brought to this screen where the patient must fill out each field.



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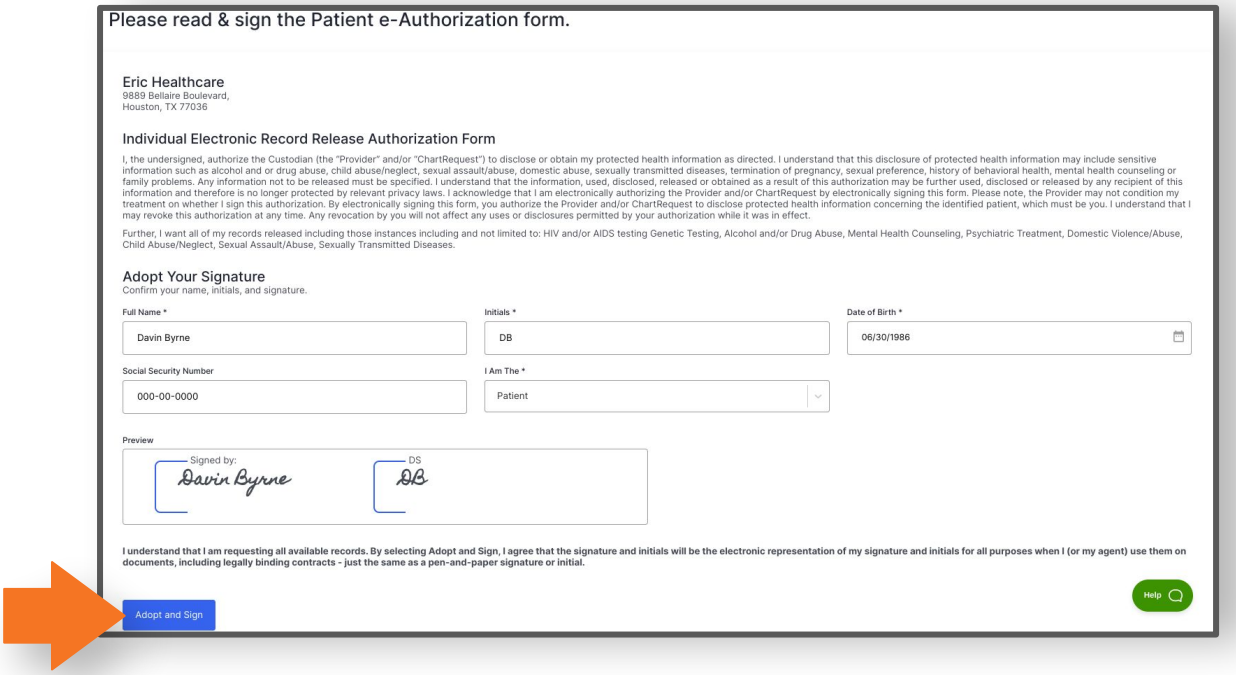
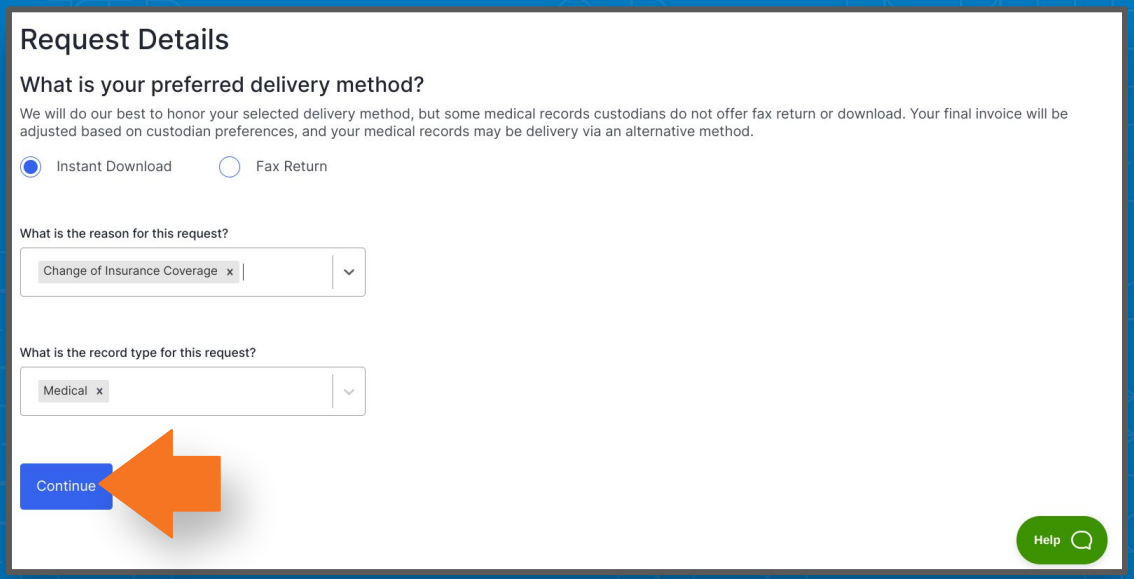
Step 11

Once you have signed the authorization, select “Adopt and Sign.”



Step 12

Next, choose the method of delivery for the request and the type of record (medical, billing, or images). Click “Continue”.



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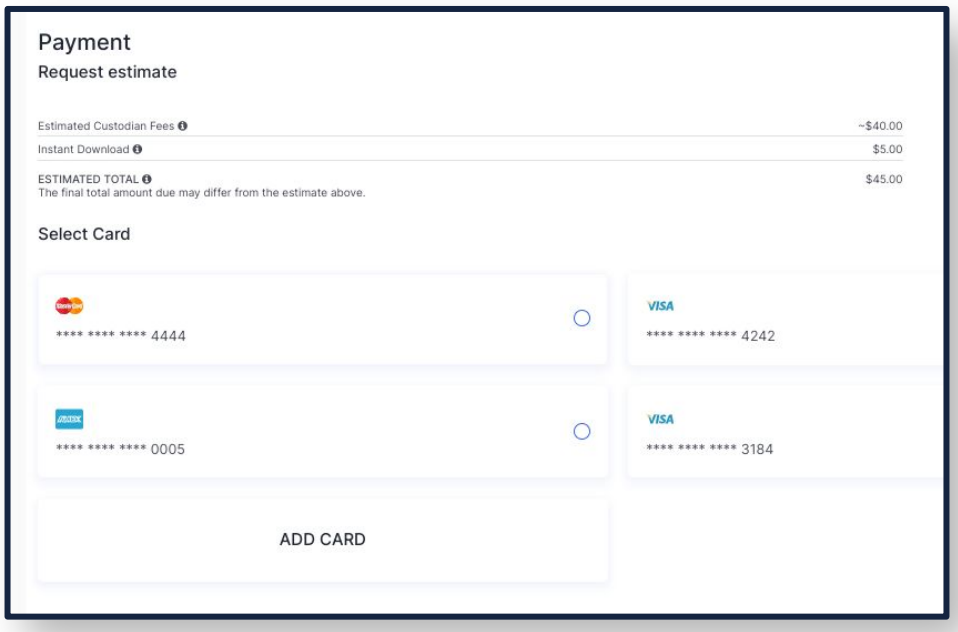
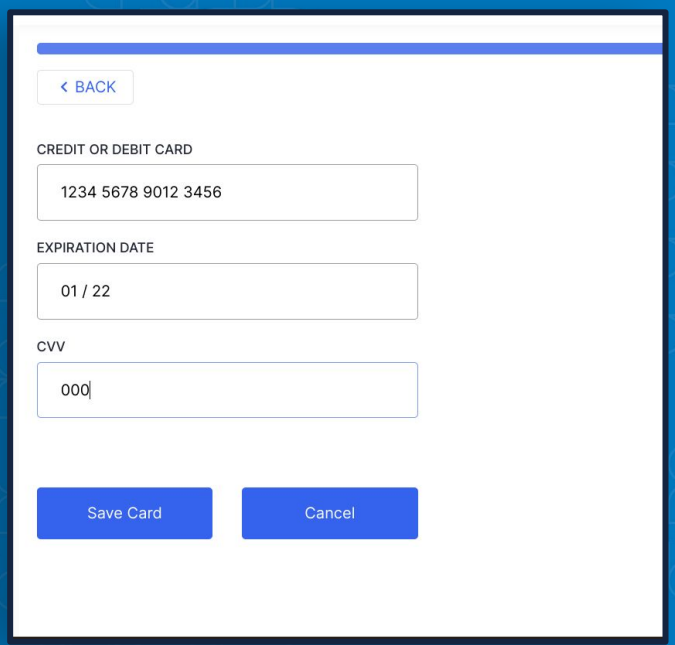
Step 13

ChartRequest will then request payment information. Select “Add Card”.





Step 14

Input your card information and select “Save Card”.

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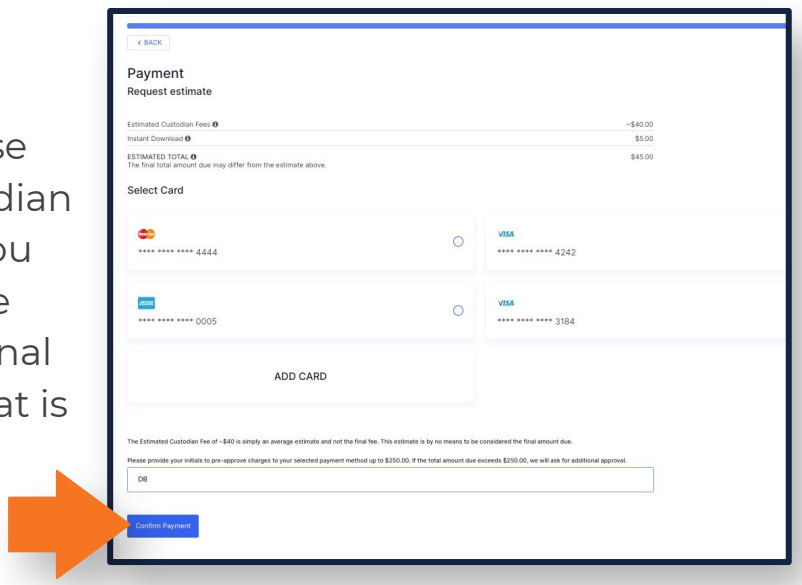
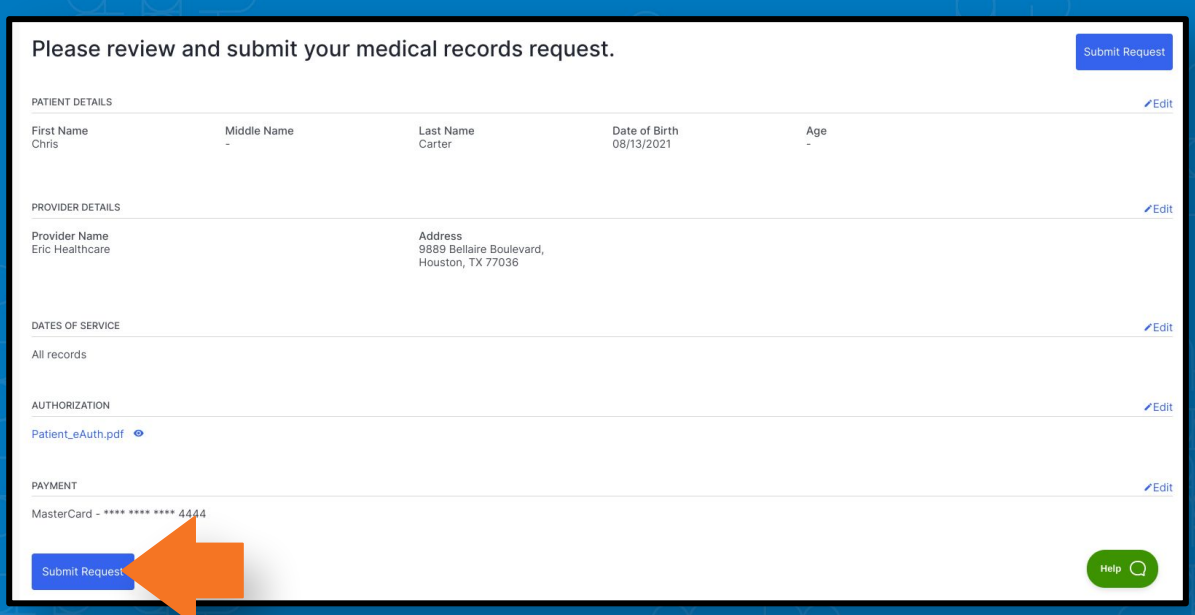
Step 15

Click “Confirm Payment”. Please note that the Estimated Custodian Fees are simply an estimate. You are not being charged until the record price is finalized. Your final price may be different that what is presented here.



Step 16

Review your record request information. You may make any changes to any section by selecting the “Edit” icon. If all of the information is correct, click “Submit Request”.



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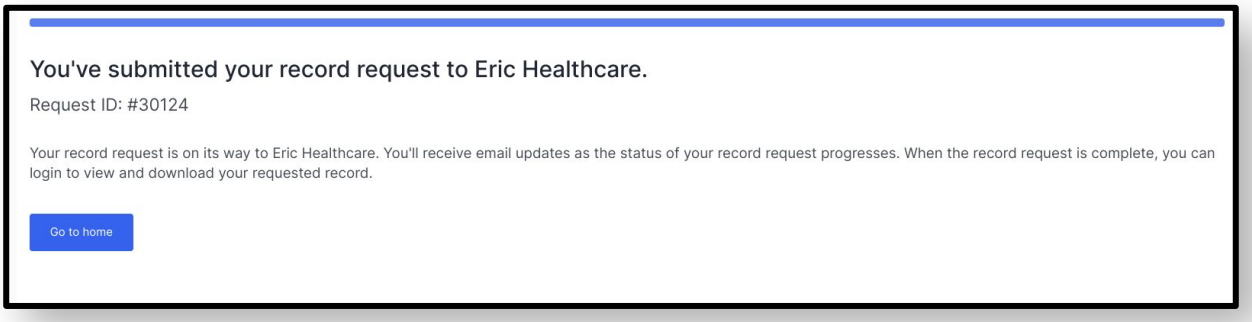
Step 17



Your record request is now being processed and you've been assigned a request ID number highlighted below. You will receive email updates on the status of your request. Once your record is available, you can login to your account to view and download your record.

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Thank you for using ChartRequest. If you have any questions or comments, please reach out to support@chartrequest.com

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