

Requestor Portal User Guide – 2023

Overview

The Enhanced Requestor Portal allows requestors to track the status of all requests, make payment and download all active and non-archived requests.

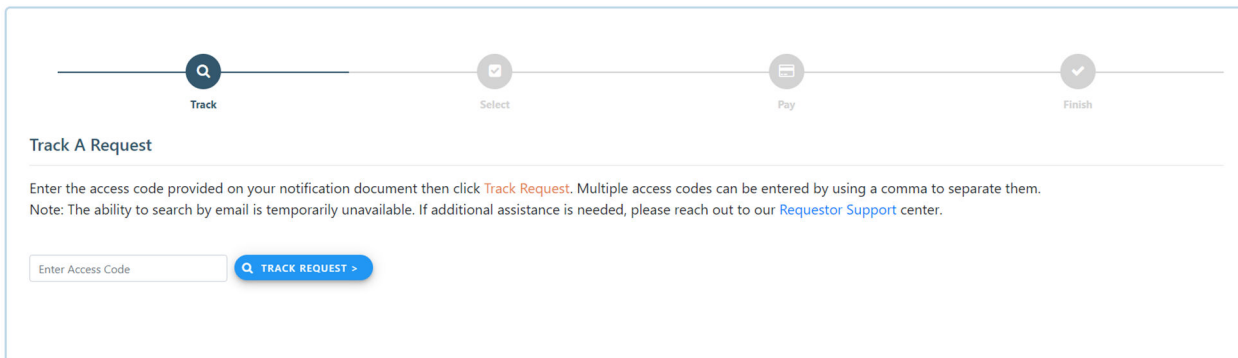
The Enhanced Requestor Portal is divided into four sections:

Track
Select
Pay
Finish

Track

To access the Requestor Portal, users should enter track.verisma.com into their browsers. It works best with Windows 11 and Edge, but other browsers and operating systems are also supported.

Landing Page



The screenshot shows a progress bar with four steps: Track, Select, Pay, and Finish. The 'Track' step is active, indicated by a magnifying glass icon. Below the progress bar, there is a section titled 'Track A Request' with instructions and a form to enter an access code.

Track A Request

Enter the access code provided on your notification document then click **Track Request**. Multiple access codes can be entered by using a comma to separate them.
Note: The ability to search by email is temporarily unavailable. If additional assistance is needed, please reach out to our [Requestor Support](#) center.

Enter Access Code

On the landing page, the user may enter an Access Code from one of their current requests.

1. Access Codes can be found on Verisma's invoices and other notification documents.
2. Multiple Access Codes can be entered using commas to separate them.

When an Access Code is entered, the user will be taken directly to the Select screen.

Select

Navigation Tabs

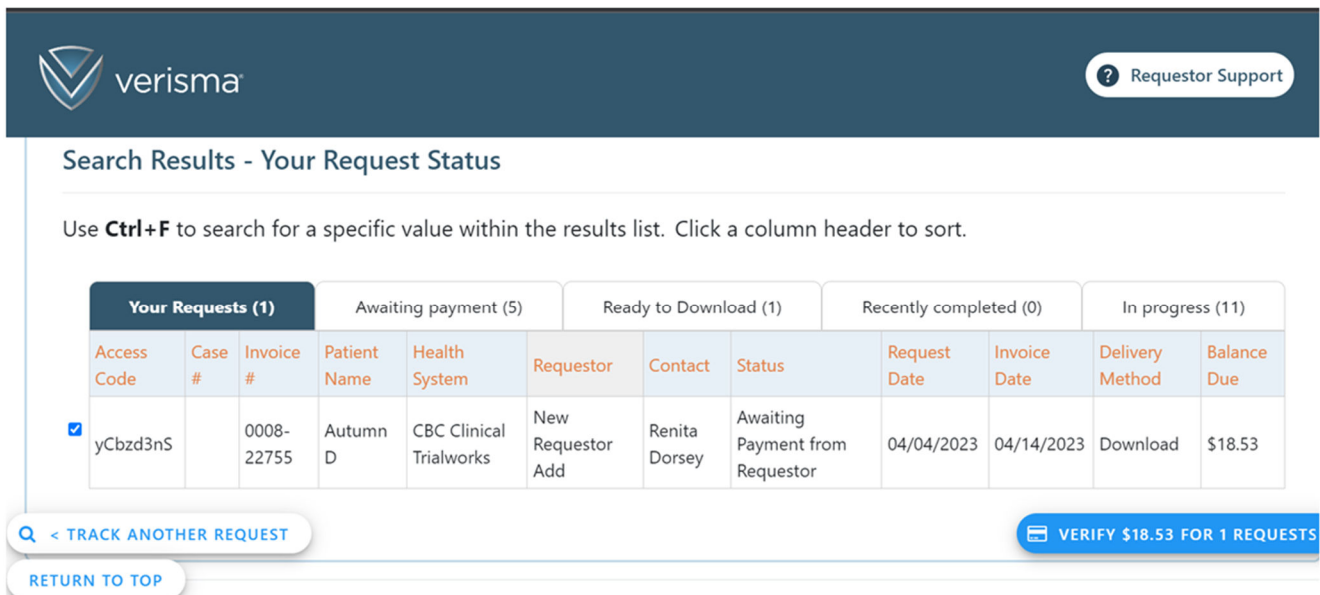
The Select screen provides five navigation tabs:

1. Your Requests
2. Awaiting Payment
3. Ready to Download
4. Recently completed
5. In progress

The number in parentheses after each tab heading shows the number of requests in each tab. Switching tabs causes the selected requests to clear.

Select one of the tabs to navigate to that section.

The “Track Another Request” button at the bottom-left corner allows navigation to the previous screen.



Search Results - Your Request Status

Use **Ctrl+F** to search for a specific value within the results list. Click a column header to sort.

Your Requests (1)			Awaiting payment (5)		Ready to Download (1)		Recently completed (0)		In progress (11)		
Access Code	Case #	Invoice #	Patient Name	Health System	Requestor	Contact	Status	Request Date	Invoice Date	Delivery Method	Balance Due
<input checked="" type="checkbox"/>	yCbzd3nS	0008-22755	Autumn D	CBC Clinical Trialworks	New Requestor Add	Renita Dorsey	Awaiting Payment from Requestor	04/04/2023	04/14/2023	Download	\$18.53

[Q < TRACK ANOTHER REQUEST](#)
[VERIFY \\$18.53 FOR 1 REQUESTS](#)

[RETURN TO TOP](#)

Columns

The information contained in each of the tabs is divided into multiple columns, including:

1. Access Code – Unique code assigned to each request
2. Case # - Unique identifier supplied by the requestor
3. Invoice # - Verisma’s unique identifier for each request
4. Patient Name – Patient’s first name and last initial
5. Health System – Facility from where records were requested
6. Requestor – Entity requesting the records

7. Contact – Contact at the requestor’s office who submitted the request
8. Status – Labels used by Verisma to signify in which stage the request is currently residing
9. Request Date – Date on the request letter
10. Invoice Date – Date when the invoice was generated
11. Delivery Method – How the request will be sent to the requestor
 - a. Print & Mail
 - b. CD/DVD
 - c. Download – If there is a download icon in this column, the request is available for immediate download by clicking on the icon
 - d. Digital Fax
 - e. Etransfer
 - f. In-Person Pick-Up at Facility
12. Balance Due – Outstanding invoice amount
13. Rejected Reason – Reason a request is cancelled by Verisma

All columns can be sorted by clicking on the column header.


If the invoice number in the third column is blue and underlined, clicking on the invoice number will allow the user to preview a pdf of the invoice, and then download or print it.

Requests that have been distributed within the past 14 days can be download by selecting the row’s checkbox.

Your Requests

This tab contains only the request(s) corresponding to the Access Code(s) that were entered.

If the request(s) corresponding to the Access Code(s) entered are available for immediate download, click on the “Download” link(s) located in the Delivery Method column:

Contact	Status	Request Date	Invoice Date	Delivery Method	Balance Due
Test Contact	Released To Requestor	01/11/2023		 Download	

If a balance is due on a single request:

- The checkbox to the left of the row is preselected
- The amount due is included in the “Verify” button on the bottom-right of the screen

Awaiting payment

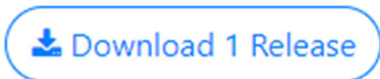
This tab contains all requests that are ready for payment. A checkbox to the left of each row is preselected. The header row also has a checkbox that functions as a Select All/Deselect All option.

After selecting the requests to be paid, click on the “Verify” button toward the bottom-right corner to advance to the Pay screen.

Ready to Download

This tab contains all requests that are ready to download. A checkbox to the left of each row is preselected. The header row also has a checkbox that functions as a Select All/Deselect All option.

After the selections have been made, click the download button located on the bottom right. The button totals the number of requests selected for immediate download:



In order to Download, the user must authenticate by using a One-Time Password (OTP) process. After entering their email address, the user can obtain an OTP to be delivered to their email account by clicking on the “GET OTP” button.

Verify Your Identity ✕

To change the delivery method, please provide your **Email** address and we'll send you a one time password.



After entering the OTP and clicking the “PROCEED” button, the download process will activate for the selected requests.

Verify Your Identity

We sent you a **One Time Password**

Didn't receive the OTP? [Resend](#)

PROCEED

The download button changes to “Preparing Download” and has a progress spinner while the downloads are being prepared.

 Preparing download

Recently Completed

This tab provides a list of all requests that were completed recently (within the last 14 days), including those requests that were cancelled. The reason for cancellation is shown in the far-right column.

Status	Request Date	Delivery Method	Rejected Reason
Release Cancelled	04/10/2021	Download	Reason Shows Here
Request Cancelled	03/03/2021	Print & Mail	Test Cancellation

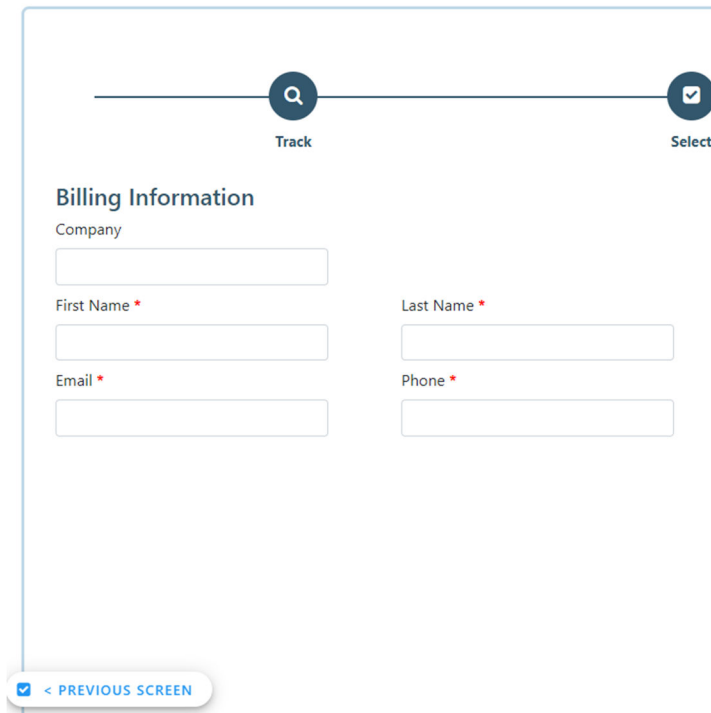
In Progress

This tab provides a list of all requests that have been received but are not yet ready to be released to the requestor.

Pay

Billing Information

Selecting the Verify button on the previous screen will navigate to the Pay screen. The billing information section must be completed by the person making the payment. A red asterisk (*) indicates the field is required.



Track Select

Billing Information

Company

First Name * Last Name *

Email * Phone *

< PREVIOUS SCREEN

Verify Transaction(s)



The Verify Transaction(s) section provides a listing of the individual requests that were selected for payment on the previous screen. The total number of selected requests is listed at the top right.

If any of the requests selected are assigned a delivery method of Print & Mail or CD/DVD, there will be a Save button allowing the user to save money on postage by updating the delivery method to Download.

If this option is selected, the “Pay” button will also update to reflect the new amount due.

The user will need to authenticate through a One-Time Password (OTP) process when the delivery method is changed.

The option to pay the full amount for the requests, and not make any updates, is still available by clicking the blue “PAY” button.

 **Pay**  **Finish**


Verify Transaction(s) 3





Access Code	Invoice	Delivery Method	Requestor Name	Status	
MbpR4J2w	0008-486251	Print & Mail	Test Requestor	Ready to Distribute	\$128.71
4USfRYxR	0008-486253	Print & Mail	Test Requestor	Ready to Distribute	\$338.02
sDCqDMY	0008-486252	Print & Mail	Test Requestor	Ready to Distribute	\$69.50
Total (USD)					\$536.23

Save \$143.09 by switching 3 delivery methods to Download.

 **PAY \$536.23 FOR 3 REQUESTS >**

Selecting the Pay button will trigger the credit card entry window.



Card Number is required

Process 41.25 USD

After all required fields are entered, select the Process button.

Finish

After payment has processed, the Finish screen provides a confirmation for the requests paid.

Paid Transaction(s)

3

Access Code 9ZdDgzVY	Invoice 0008-21988	Delivery Method Download	Requestor Name Test Requestor	Status Released To Requestor	\$26.25
Access Code GXnCymN9	Invoice 0008-21997	Delivery Method Download	Requestor Name Test Requestor	Status Released To Requestor	\$7.50
Access Code PVpPyRat	Invoice 0008-21987	Delivery Method Download	Requestor Name Test Requestor	Status Released To Requestor	\$7.50
Total (USD)					\$41.25

The “Receipt” section provides an Auth Approval Code for your records. Selecting the receipt link provides the ability to view, download, and/or print the receipt.

Receipt

[Print this receipt for your records](#)

Company:

First Name: Test

Last Name: Contact

Email: lhawley@verisma.com

Phone: 719-252-7245

Verisma Invoice number: 0008-21988,0008-21997,0008-21987

Credit Card Number: 37*****2008

Date of payment: 01/24/2023 11:22:31 AM

Amount: \$41.25

Auth Approval Code: 269564

 [Download 3 Releases](#)

A receipt will also be emailed.

**\$41.25 USD**01/24/2023 11:22:31 AM
VERISMA SYSTEMS INC

Your payment has been approved

Payment AMEX 37*****2008
Transaction ID 240123C2B-01A78C55-ECAF-4F9D-AA9D-66277082DE46
Approval Code 269564
ECI
Verisma Invoice Number 0008-21988,0008-21997,0008-21987

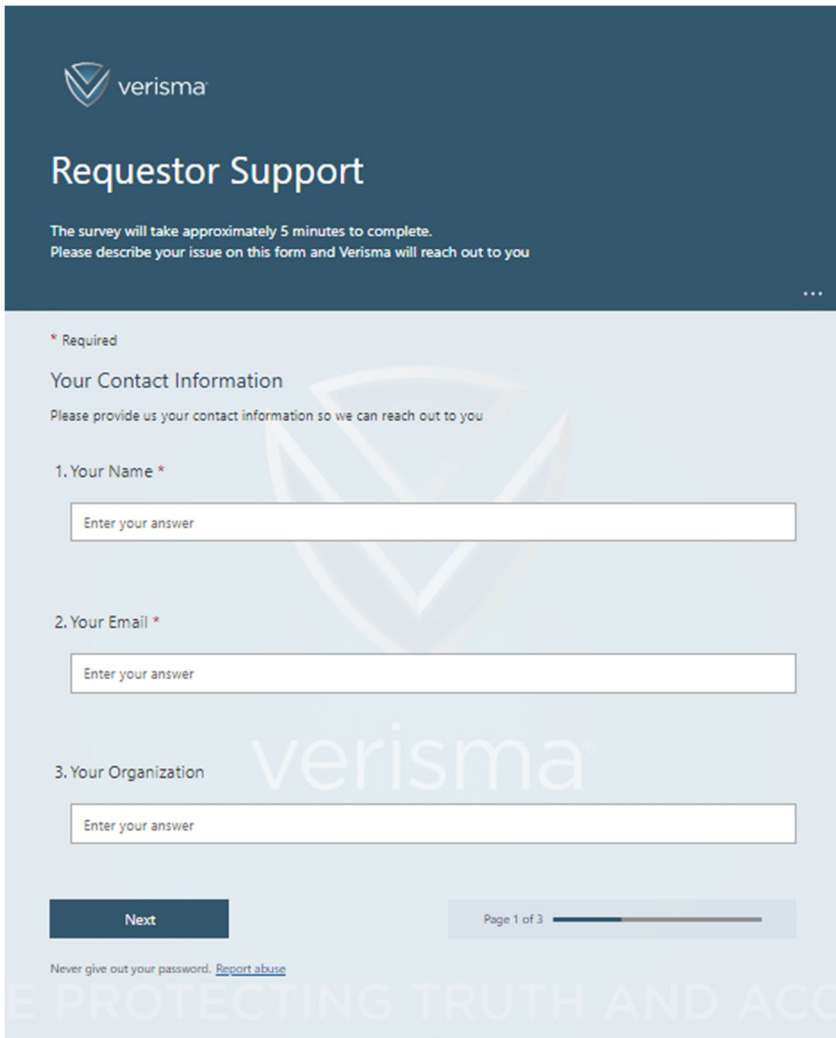
Sales Tax	\$0.00
Discount Amount	\$0.00
Duty Amount	\$0.00
Freight Amount	\$41.25
Total	\$41.25 USD

Frequently Asked Questions (FAQs)

What happens if I receive an error?

If the system displays an error message, the user will be provided with an opportunity to complete a form where they can request assistance. This form can be used to submit any other issue as well.

The form asks for the information needed to assist the user.



The screenshot shows a survey titled "Requestor Support" on a dark blue header. Below the header, there is a Verisma logo and the text "Requestor Support". A sub-header indicates the survey duration and purpose: "The survey will take approximately 5 minutes to complete. Please describe your issue on this form and Verisma will reach out to you". The main content area is light blue and contains a "Your Contact Information" section with three required fields: "1. Your Name", "2. Your Email", and "3. Your Organization". Each field has a placeholder "Enter your answer". A "Next" button is located at the bottom left, and a progress indicator shows "Page 1 of 3". A footer note says "Never give out your password. [Report abuse](#)".

*** Required**

Your Contact Information

Please provide us your contact information so we can reach out to you

1. Your Name *

2. Your Email *

3. Your Organization

Next Page 1 of 3

Never give out your password. [Report abuse](#)

* Required

Your Issue Details

Please provide details of the issue you encountered so we can effectively resolve the issue

4. Issue Type *

5. Facility (from which records were requested) *

6. Invoice Number (if available)

7. Access Code (if available)

[Back](#) [Next](#) Page 2 of 3

Never give out your password. [Report abuse](#)

Additional Information

Please provide any additional information you may have

8. Additional Information


You can print a copy of your answer after you submit

[Back](#) [Submit](#) Page 3 of 3

Never give out your password. [Report abuse](#)



This content is created by the owner of the form. The data you submit will be sent to the form owner. Microsoft is not responsible for the privacy or security practices of its customers, including those of this form owner. Never give out your password.

Powered by Microsoft Forms | The owner of this form has not provided a privacy statement as to how they will use your response data. Do not provide personal or sensitive information. | [Terms of use](#)



What if the Save button doesn't contain a dollar amount?


If postage was not originally included for the selected requests, the “Save” button will show as an Update button (outlined in blue). This offers the user a chance to change the Release Method of the requests to Download. In the example below, none of the requests have postage applied.


Pay

Finish

Verify Transaction(s) 4

Access Code	Invoice	Delivery Method	Requestor Name	Status	
dnuBmdbA	0008-486240	Print & Mail	Test Requestor	Released to Requestor	\$0.12
43heB2H7	0008-486241	Print & Mail	Test Requestor	Released to Requestor	\$1.20
JhHkz2pQ	0008-486242	Print & Mail	Test Requestor	Released to Requestor	\$4.20
V9BrbTtK	0008-485912	Print & Mail	Test Requestor	Ready to Distribute	\$0.12
Total (USD)					\$5.64

Update the delivery method to download.

 **PAY \$5.64 FOR 4 REQUESTS >**