



User Guide
for attorneys, secretaries & paralegals

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Program Basics

Logging in

Sign in to check order status and account activity, download files, plus make online order requests.

1. In the Log-In screen, enter your assigned user name and password.

2. Click **Sign In** (or press the **Enter** key).

**TIP**

Our online offices are password-protected. To access them, you must use your user ID and password. If you have forgotten your password, click **Forgot Password**. Enter your user ID in the Reset your password pop-up and click **Submit**. We will send an email to the address we have on file for you with a link to the page where you can reset your password. If you do not have a user ID and password, or have forgotten your user ID, please contact us.

Program Basics

Resetting password for security reasons

For security reasons, your agency might require that you reset your MR Web password periodically before you can access your online office.

1. If the Reset Your Password pop-up appears after signing into the Log-In screen, enter a new password in both **New Password** and **Confirm Password**. Make note of your new password.

2. Click **Submit**.

**TIP**

Your agency might allow users to keep their current password. If so, you can enter your current password in **New Password** and **Confirm Password** before submitting your reset password.

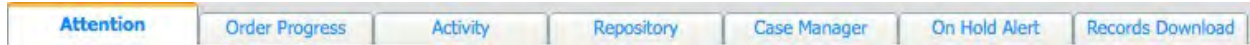
**NOTE**

The current version number of MR Web appears at the bottom left corner of every page. When reporting problems, please indicate the version number to speed up the support process.

Program Basics

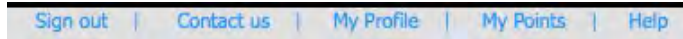
Navigating the site

Within MR Web, access the main areas, such as your order status, account activity, repository or online orders, by clicking the tabs in the navigation bar near the top of the screen.



NOTE

Access this manual online by clicking **Help** at the top right of the browser window.



Program Basics

Exiting the site

Whenever you are logged in and have not clicked anything for 20 minutes, you are automatically disconnected from the site. Instead of letting your time expire, log out when you have finished by either:

- Clicking **Sign Out** in the navigation bar to return to the Log-In screen, or
- Closing your browser window.

Program Basics

Downloading & reviewing files

MR Web includes several locations where you can download files. It also has a simple system so you can track which files you have downloaded and viewed.

1. In any list of files that includes the **Reviewed** column, click the highlighted file you want to download.
2. If a pop-up window appears asking if you want to mark the file as “Reviewed” before you download it:
 - Click **OK** to track the date and time that you downloaded and reviewed this file. The date and time replaces **Mark as Reviewed**.
 - Click **Cancel** to download the file without tracking date and time.

Part No.*	Order Date	Location	Record Type	Status			
1	10/16/2007	Memorial Herman Hospital Medical Records 7770 Southwest Freeway Houston, TX 77041 (Ordered As: Memorial Herman Hospital [Sector-A1])	Medical	No Records Detail Status: Contacting Custodian			
	Received	Record Type	Pages	File Name	File Description	Size(KB)	Reviewed
	10/18/2007	Medical	17	Hospital Records.pdf		218	11/20/2007 10:36 AM
2	10/16/2007	St. Luke's Episcopal Hospital Medical Records 6720 Bertner, Bldg 2-256 Houston, TX 77030	Radiology	Records Obtained Detail Status: Order Received			
	Received	Record Type	Pages	File Name	File Description	Size(KB)	Reviewed
	11/23/2007	Radiology	1	MRI.jpg	Brain scan dated 1/23/2004	96	Mark as Reviewed
	11/20/2007	Radiology	3				

Attention

Viewing orders that require your attention

The first screen you see when you sign into MR Web is the Attention screen. Under Attention, open orders that require your attention are listed. You can easily see what each open order's status is and what needs to be done. You can send the case coordinator a quick message instructing him or her how to proceed with the order.


- In the Attention screen, all open orders that require your attention are listed. To limit the orders shown, use one or more search filters in the **Search Criteria** pane:
 - Attorney** – Default is all of the attorneys who have been granted access to the case. Use the drop-down to select a single attorney.
 - Case Name** – To find orders for a specific case, enter part of the case name into the field.
 - Order Date From/To** – To find orders for a specific time period, enter beginning and/or end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
 - Order No.** – Enter the order number.
 - Patient** – To find orders for a specific patient, enter part of the patient's name.
- Click **Search**.
- Only orders that meet your search criteria appear.

Order-Part No.	Patient	Location	Record Type	Tracking Step
1004.001	Robert Yonger	Memorial Herman Hospital Medical Records 1000 Main Street Suite #211 Houston, TX 77041 (Ordered As: Memorial Hospital)	Medical	Waiting for Fee Approval
Tracking Step			Date	Remarks
Waiting for Fee Approval			9/10/2016 3:59:24 PM	
Records Received			9/10/2016 3:32:10 PM	

- Click the Send Message icon (pinned note) next to the contact's name to send a quick message to the case coordinator who is in charge of this order.

Contact
Jason Yee 

- In the Send Message pop-up, enter a **Subject** and your **Message**, then click **Send**.

 **Send Message**

Order-Part No.	1004.001	Case Name	Yonger vs. Merck
Patient	Robert Yonger	Record Type	Medical
Location	Memorial Herman Hospital Medical Records 1000 Main Street Suite #211 Houston, TX 77041 (Ordered As: Memorial Hospital)		

Subject:*

Message:*

(max: 3000 characters)



TIP

To change the order of the listings in the Attention screen, select a category in the **Sort By** drop-down, then click **Search**. For example, to sort a list by patient, choose Patient in the **Sort By** drop-down.

Order Progress

Viewing order status

You don't have to call us to check your order status. The information on our site is always the most complete and up to date available.

1. Click **Order Progress** in the navigation bar.
2. In the Order Progress screen, all orders placed within the last 45 days are listed automatically. To change the selection, use one or more search filters in the **Search Criteria** pane. Then click **Search**.
3. All orders that meet the search criteria are listed, along with their current status. Rush orders are noted by a checked **Rush** box. Click an **Order No.** (highlighted in blue) to view all of the locations for the order with their current status and records received.

Order Progress

Order No.	Order Date	Patient	Case Name	Client Matter No.	Rush	Status
1004	9/5/2007	Robert Yonger	Yonger vs. Merck	45-123	<input checked="" type="checkbox"/>	Completed
1005	9/5/2007	Brian Christopher	Johnson vs. Merck		<input type="checkbox"/>	New
1006	9/5/2007	Juan Perez	Perez vs. Merck		<input type="checkbox"/>	New
1008	9/5/2007	Jerry King	King vs. Merck	45-123	<input checked="" type="checkbox"/>	New
5002	10/16/2007	Yong B. Lee	Lee vs. Merck	45-123	<input checked="" type="checkbox"/>	New
5003	11/8/2007	Kathy Perales			<input type="checkbox"/>	New
5004	11/10/2007	James Smith	Smith vs. Merck		<input type="checkbox"/>	Active
5005	11/14/2007	Michael Jones			<input type="checkbox"/>	Completed
5006	11/15/2007	Larry Shoemaker	Smith vs. Pfizer		<input type="checkbox"/>	New

4. All locations for the order appear with their record type, current status, and all of the records received from each location. Click the **Detail Status** (highlighted in blue) to see more detailed tracking steps for the location.

Part No.	Order Date	Location	Record Type	Status
1	9/10/2007	Memorial Herman Hospital Medical Records 1000 Main Street Suite #211 Houston, TX 77041 (Ordered As: Memorial Hospital)	Medical	Records Obtained (12/10/2007 11:29:21 AM - Yong Lee) Spoke with [redacted] stated that the records that we received via fax at her, but our records will be mailed out tomorrow. Detail Status: Records Received
	Received	Record Type	Pages	File Name
	9/8/2007	Billing	10	ABS-0001-0019.pdf
	9/8/2007	Billing	10	Contract.pdf
	9/11/2007	Medical	23	Subpoena for Custodian.pdf
	9/21/2007	Medical	12	
	9/28/2007	Medical	0	
2	9/10/2007	Dr. Steven Jacobs 111 Forensic Avenue, Suite 500	Medical	Records Obtained Detail Status: Waiting for Fee Approval

Step	Date	Remarks
Out of Waiver		
Records Received	2/24/2008 3:57:00 PM	
Contacting Custodian	12/4/2007 10:35:00 AM	Note 3
Contacting Custodian	10/29/2007 3:58:00 PM	Note 2
Contacting Custodian	10/29/2007 3:58:00 PM	Note 1
Records Delivered	10/29/2007 3:58:00 PM	On hold for \$300 fee approval
Contacting Custodian	10/29/2007 3:55:00 PM	First call date is 9/11
Order Received	9/10/2007	

5. Click a **File Name** (highlighted in blue) to view or download the record.

Received	Record Type	Pages	File Name
11/28/2007	Other	11	ABS-0001-0019.pdf

6. Click **Back** (located at the bottom of the screen) to return to the Order Progress screen.

Activity

Viewing account activity

See at a glance which invoices have been paid and what you still owe. Filter invoices by invoice date, attorney, case name, order date and account status. Review the details of any invoice.

1. Click **Activity** in the navigation bar.
2. In the Activity screen, your current invoices (billed during the last 30 days) appear automatically. To change the selection, use one or more search filters in the **Search Criteria** pane. Then click **Search**.
3. To change the order of the invoices, click the heading of the column you want to sort the rows by. Click the column header again to reverse the sort order.
4. Click an invoice number (highlighted in blue) for more details.
5. In the Invoice Detail screen, if a **Files** section appears, you can download and view the original invoice by clicking the file name (highlighted in blue).



6. Click **Back** (located at the bottom of the screen) to return to the Activity screen.

**TIP**

Save time in all Search Criteria panes by pressing the Enter key after entering search criteria in a text box instead of clicking Search.

Repository

Reviewing case-wide documents

Using our secure online document repository, you can access all of your files for a particular case from anywhere you have Internet access.

1. Click **Repository** in the navigation bar.
2. In the Repository screen, search for a case by using one or more search filters in the **Search Criteria** pane:
 - **Case Name** – Enter part of the case name.
 - **Patient** – Enter part of the patient name.
 - **Case No.** – Enter the complete case number.
 - **Order No.** – Enter the complete order number.
3. Click **Search**. All potential matches to the information you entered appear. Click an order number (highlighted in blue) to see all of the associated files for the order.
4. In the Files screen, search for a file by using one or more search filters in the **Search Criteria** pane:
 - **File Type** – Select a file type in the drop-down list.
 - **File Name** – Enter part of the file name.
 - **File Description** – Enter part of the description.
5. Click **Search**.
6. Click the file name (highlighted in blue) to view or download.

File Name ↕	File Type	Description
ABS-0001-0019.pdf	Exhibit	Hospital discharge paper
Software Intract.pdf	Exhibit	Discharge record

7. Click **Back** (located at the bottom of the screen) to return to the Repository screen.

Case Manager

Entering new requests from scratch

If you are starting a new case, use Case Manager to make a request for records online. You do not have to enter all of your information at once. The program saves your information, so you can return to finish the request at your convenience.

Any fields labeled in red and marked with an asterisk are required information. Any other selections not relevant to your request can be left blank. If you are making a request on a continuing case, save time by copying and editing an existing request, instead of starting from scratch. (See “Creating new requests from old orders.”)

1. Click **Case Manager** in the navigation bar.
2. Click **New Case** (located at top right).
3. Under Case Information, enter the following applicable information:
 - **Style of Case** (required) – Enter the style of case as you wish it to appear on legal papers. If the style is longer than 50 characters by 7 lines, use the **Full Case Name** and **vs.** multi-line text fields.
 - **Case No.** – Enter the court-assigned cause number for this case.
 - **Rush** – If this is a rush order, select Yes in the drop-down.
 - **County** – If this is a *state* case, enter the county, such as “Harris.”
 - **Court** – If this is a *state* case, enter the judicial court information, such as “151st” or “County Court at Law Number Two.”
 - **Federal** – If this is a *federal* case, select Yes in the drop-down, then:
 - **District** – Enter the district, such as “Southern.”
 - **Division** – Enter the division, such as “Houston.”
 - **Trial Date** – Enter the scheduled trial date, or click the calendar button and select the date in the pop-up Date Navigator.
 - **Client Matter No.** – Enter your file (reference) number.
 - **State** – Select the state (where the case is filed) in the drop-down.
 - **Remarks** – Enter any additional relevant information in the text field.
4. Under Records Of, enter the following applicable information:
 - **Patient** (required) – Enter the patient’s name, including “aka” (also known as), if applicable.
 - **Patient Type** – Select a type in the drop-down, such as Plaintiff.
 - **SSN** – Enter the patient’s social security number.
 - **Date of Birth/Death** – Enter dates, if applicable, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
 - **Address** – If necessary, enter the home address of the patient. Do not include city, state or zip code here. Enter this information in the separate **City** field, **State** drop-down, and **Postal Code** field.
 - **Authorized By** – Specify whether the authorization is by Subpoena or by Patient. The default is Subpoena.
5. Under Scheduling Attorney, enter the following applicable information:
 - **Attorney** (required) – Select the attorney ordering records in the drop-down.
 - **Ordered By** – Enter your name here.

- **Attorney For** – Select which side the attorney represents in the drop-down, such as Defendant.
 - **Represents** – Enter the name of the person or group the attorney represents.
6. Under Billing Information, check the **Same as Ordering** box if invoices are to be sent to the attorney. Otherwise, leave the checkbox blank, and enter the third-party billing information, including the insurance claim number.
 7. Click **Save**. Four tabs—**Case**, **Attach Files**, **Attorneys of Record** and **Locations**—appear. The **Attach Files** tab is automatically selected. See “Attaching files to online orders,” “Adding attorneys of record” and “Adding locations.”

**TIP**

Click the **Case** tab if you want to review or change any of the information you’ve just entered.

Case Manager

Attaching files to online orders

If you have files that you would like to send in with your request (for example, a list of attorneys or locations that you would like us to enter for you), you can attach the files to your request.

1. On the **Attach Files** tab of a case in Case Manager, click **New**.
2. In the New File section, enter the following applicable information:
 - **File Name** (required) – Click **Browse** to locate the file you want to attach.
 - **File Type** (required)– Select a file type in the drop-down.
 - **Description** – Enter any comments about the file.
3. Click **Save**.
4. Repeat steps 1–3 to attach additional files.

**NOTE**

You can revise the information about a file by clicking the edit (pencil) button. Or delete a file by clicking the delete (X) button.



Case Manager

Adding attorneys of record

To prepare accurate legal papers, we need a complete list of parties on the case. If you already have the list as a file (e.g., a *Word* or *Excel* document), send us the file instead of typing the list in yourself. (See “Attaching files to online orders.”)

1. On the **Attorneys of Record** tab of a case in Case Manager, click **New**.
2. In the New Attorney section, enter the following applicable information:
 - **Firm** (required) – Enter the name of the law firm.
 - **Last Name** (required) – Enter the last name of the attorney.
 - **First Name** (required) – Enter the first name of the attorney.
 - **Initial** – Enter the first letter of the attorney’s middle name.
 - **Attorney For** – Select which side the attorney represents in the drop-down, such as Plaintiff.
 - **Address** – Enter the address of the firm. Do not include city, state or zip code here. Enter this information in the separate **City** field, **State** drop-down, and **Postal Code** field.
 - **Opposing Side** – Select Yes if the attorney is on the opposing side.
 - **Ordering Attorney** – Select Yes if the attorney is a co-counsel and will also sign the legal papers.
 - **Patient’s Attorney** – Select Yes if the attorney is the patient’s attorney.
 - **Represents** – Enter the name of the person or group the attorney represents.
3. Click **Save**.
4. Repeat steps 1–3 to add additional attorneys.



NOTE


You can revise the information about an attorney by clicking the edit (pencil) button. Or delete an attorney by clicking the delete (X) button.

Case Manager

Adding locations

The final stage of the order process is designating which locations (facilities) you want records from. Save time and reduce errors by looking up locations in our database instead of typing in the information yourself.

1. On the **Locations** tab of a case in Case Manager, click **New**.
2. In the New Location section, click **Lookup Location**. In the Search Location window, enter part of the name of the facility you want records from in **Name** (required) and click **Search**. If the facility appears in the results grid, click the name (highlighted in blue). The location fields will automatically populate in the New Location section.

 **Search Location**

Name:*

City: State:

Name +	Department	Address	City	State	Postal Code
Highland Hospital	Medical Records		Oakland	California	
Memorial Herman Hospital	Medical Records	1000 Main Street Suite #211	Houston	Texas	77041
Memorial Herman Hospital	Medical Records	7770 Southwest Freeway	Houston	Texas	77041
St. Luke's Episcopal Hospital	Medical Records	6720 Bertner, Bldg 2-256	Houston	Texas	77030
Texas Children's Hospital	Medical Records	6621 Fannin Street	Houston	Texas	77030
UNM Hospital	Medical Records	2211 Lomas Boulevard NE	Albuquerque	New Mexico	87106

3. If the location does not appear, click Close in the Search Location window and enter the facility information in the New Location section.

**NOTE**

Click **Reset** in the New Location section if you want to clear all the location fields and start over.

4. Enter the following applicable information:
 - **Record Type** – Select a type of records in the drop-down.
 - **Instructions** – Select a special instruction concerning evidence (e.g., admissible) in the drop-down.
 - **Remarks** – Enter any notes about this facility.
5. Click **Save**.
6. Repeat steps 1–4 to add additional locations.
7. Click **Close**.
8. Back at the Case Manager screen, click **Submit** to send the order to our office. (See “Submitting your orders.”) If you want to review the information you’ve entered, click the order number (highlighted in blue).

**NOTE**

You can revise the information about a location by clicking the edit (pencil) button. Or delete a location by clicking the delete (X) button.

Case Manager

Submitting your orders

Once you submit an order, you will receive an automatic email instantly confirming that we have received your order. After we verify and import the data, we will send you an actual order confirmation listing all of the details of the order.

1. In the Case Manager screen, click **Submit** next to the order you've just entered. If you want to review the information before you submit, click the order number (highlighted in blue).




Case Manager

Attorney	Order No.	Patient	Case Name	Client Matter No.	Rush	Status	Action
Daniel Berg	5134	Steward Richardson			<input type="checkbox"/>	Request New	Submit
Daniel Berg	5137	Yong Lee			<input type="checkbox"/>	Request New	Submit

Warning: There are order requests that have not been submitted yet. Please click Submit to send the requests to our office.

2. In the Submit window, enter email address(es) as explained, then click **Submit** once.



Case Manager > Submit

If you are finished with the order, click the **Submit** button once to send it to our office. Otherwise, click **Close** to return to Case Manager without submitting the order.
Once orders are submitted, no changes can be made.

I want an auto confirmation to be sent to the following email addresses. For multiple email addresses, enter with comma(,) separation.

Submit Close

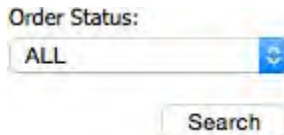
3. Once the order is submitted successfully, it is removed from the Case Manager screen.

Case Manager

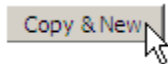
Creating new requests from old orders

If you are entering a new request on a continuing case (e.g., a new plaintiff on a class-action law suit), save time and reduce errors by copying an existing order and entering only the new information, instead of starting a request from scratch.

1. Click the **Case Manager** tab.
2. In the Search Criteria pane, enter part of the **Case Name**, **Client Matter No.** or **Patient** name in the appropriate field, and select ALL in the **Order Status** drop-down.



3. Click **Search**.
4. Locate a previous order on the same case, then click its order number (highlighted in blue) to display details.
5. In the detail window, click **Copy & New** (at the bottom of the screen).



6. Every field is copied from the selected order except the patient information, attached files and locations. Enter the new patient information, then click **Save**.
7. The **Attach Files** tab automatically appears if you have files to send in with your request. (See “Attaching files to online orders.”)
8. Click the **Attorneys of Record** tab to make any changes to the information copied from the selected order. (See “Adding attorneys of record.”)
9. Click the **Locations** tab to add facilities you want records from. (See “Adding locations.”)
10. Click **Close**.
11. Back at the Case Manager screen, click **Submit** to send the order to our office. (See “Submitting your orders.”)

Case Manager

Changing order requests

Once an order is submitted, you cannot change the information already sent. If you need to revise the order, please contact our office. However, you can still add new files, attorneys or locations to the orders already submitted. For example, it is common to discover more facilities to get records from after submitting the initial order.

1. Click the **Case Manager** tab.
2. In the Search Criteria pane, enter part of the **Case Name**, **Client Matter No.** or **Patient** name in the appropriate field, and select ALL in the **Order Status** drop-down.
3. Click **Search**.
4. Locate a previous order you need to add additional files, attorneys or locations to, then click its order number (highlighted in blue) to display details.
5. The information on the **Case** tab cannot be modified. If you need to revise any field in this tab, please contact our office.
6. Click the **Attach Files** tab if you have files to send. (See “Attaching files to online orders.”)
7. Click the **Attorneys of Record** tab to add additional attorneys. (See “Adding attorneys of record.”)
8. Click the **Locations** tab to add additional facilities you want records from. (See “Adding locations.”)
9. Click **Close**.
10. Back at the Case Manager screen, click **Submit** to send the additional information to our office. (See “Submitting your orders.”)