Cora Health Access to Records Subject Access Portal Guide

Contents

Introduction

Cora Health's Access to Records department request portal enables patients or their authorised representatives to request and receive health records.

The portal is a secure and simple way to request and receive health records.

This guide is to help requesters use the portal, which can be found at https://corahealth.ams-sar.com/ It will show you how to:

1. Create a new account, log in and navigate the portal.
2. Submit and manage health record requests.
3. Download the disclosed records.

How to create an account

Click "Get Started Online"

You only need an email address and password to set up the account.

— **Summary**
— **How to make a request**
— **Get Started Online**

If you do have an account with us already click "Login"

If you do not already have an account click "Don't have an account? Sign up"

➜ **Login**

➜ **Don't have an account? Sign up**

Enter your email address and then enter it again to confirm it.

Click "Register Now!"

Email address
[Enter your email]

Confirm Email address
[Confirm your email]

Already have an account? Login

Register Now!

Register for a new account

✔ Submit online
✔ Track Progress
✔ Secure Communication
✔ Instant Reference
✔ Download Requested Files

➜ Don't want to sign up? Continue as a guest

✅

You have successfully requested an account. A verification link has been sent to the email address you entered. Please use the embedded link to verify your identity and to finish creating your account.

A confirmation will appear that a link

has been sent to your email address
to allow you to complete the set up.

Log in to your email account and open the email from "Sars No reply". In the email you will see a
"Login" link. Click this and it will take you to the portal login page.

Enter a password for your account and then enter it a second time to confirm it then click "Set
password"

You will get a message that your registration is complete.

Click the "Login to your account" link; enter your email address and password.

How to log into your account

Once you have an account you can
use the login link on the portal home
page or go directly to
https://corahealth.ams-
sar.com/Account/Login

Enter your email address and
password then click "Sign In".

If you have forgotten your password,
click the "Forgotten your password?"
link.

You will be taken to your home page
where you can submit a new
request, manage and view existing
requests and manage your profile.

Email

Enter your email address

Password

Enter your password

Forgotten your password?

☐ Keep me logged in

Sign in

Managing Your Profile

This page allows you to change your
password or add two factor
authentication to your account.

You can access it by clicking either
of the two "My Profile" links on the
page.

In order to change your password,
click the "Password" button.

Your Profile

Mange you profile settings including changing password
and enabling two factor authentication.

On the page that opens click the "Change password" button.

Enter your existing password.

Enter your new password and confirm by re-entering it in the confirmation box.

Click the "Set Password" button.

Change Your Password

Current Password

New Password

Password

Re-enter password

Confirm Password

Re-enter password

SET PASSWORD

Click "Two Factor" to enable a second level of authentication when logging into the SAR web portal.

Once enabled you will be required to enter a unique pin code that will be sent to the registered mobile phone.

Enter a mobile phone number and click "Get code" to confirm the number.

Enable Two Factor Authentication

Mobile Number
Whenever you login, along with your username and password, you will have to enter a unique 6 digit code sent to your mobile. Please enter in the mobile number you want this code to be sent to. We will send a code to this device now to register it.

mobile number

GET CODE

How to submit a new subject access request

Click "New Request" on your home page.

New Request

Submit a new subject access request online.

Click on the application type relevant to your request. There are six to choose from.

1. **Request – Organisation for records with consent** – This form is to be used by organisations, such as solicitors, police, private health companies, insurers etc. to request health records. A consent form signed by the patient will be required.

2. **Request – Non-executor for deceased patient records** – Application by an individual for deceased patient records where the requester is not an Executor of the estate.

3. **Request – My own health records** – Application for your own health records.

4. **Request – Organisation for records when no consent is required** – Application from an organisation for patient health records which do not require consent, such as courts, coroner etc.

5. **Request – 3rd party individual for living patient records** – Application from a 3rd party individual, such as a relative, for the health records of a living patient.

6. **Request – Executor for deceased patient health records** – Application by an Executor

of an estate for the health records of a deceased patient.

Complete each field listed, fields marked with a red * are mandatory.

Click "Continue" at the end of each step.

To upload documents, click the square to browse your computer, and select the relevant document(s).

Please note, the following file types are accepted when providing your documents -

.pdf, .tiff, .tif, .png, .bmp, .jpg, .jpeg, .doc, .docx

If you receive this message from the webpage, please   try an alternative file type.

Message from webpage ✕

⚠ Invalid file type

OK

Click "Submit" to send in your request.

Once you have completed your application, a confirmation page will appear which will include your reference number. You will also receive an email to confirm your application, also with your reference number.

How to view the status of your request

The Manage Requests section allows you to see the status of your requests.

Manage Requests

Manage and view the status of your existing requests.

When you click the 'Manage Requests' link, you will see a list of your requests and, if you have more than one, you will be able to search for a request.

Requests are listed in columns, which are; the **Type** of application form used, the application **Reference** number, the **Name** of the patient, the date the request was **Submitted** and the current **Status** of the request, for example, if it has been completed or is currently active.
If you have more than one request you will see these two buttons at the top of the listing. The first refreshes the list of applications and their status so you have the most up to date list.

The second opens and closes the full screen view.

A question mark next to a request means there is a message related to that request which you need to read and which, possibly, requires a reply. Please answer these questions as quickly as possible so as not to delay your request.

You will also receive an email if Cora Health has sent you a message regarding your request. The sender will be "Sars No Reply". We will never ask you for your password in any of these emails.

You can either log in to your portal area or, after going to the request,

respond to the message or click the link in the email, then click "Login".

Enter the email address and password that you created for your account.

Click "Sign in".

An alert will appear, stating there is a question that needs your attention.

Click "Click here".

The message will be displayed at the bottom of the page.

If the message is also asking you to upload a document, a square will appear. Click the square to browse your computer and select the relevant document(s).

Type your response in the box.

Click "Save" and your message will be sent to Cora Health.

How to retrieve your documents after disclosure

When Cora Health has completed your request, you will receive an email. Follow the instructions as for when you receive a message.

An alert will appear, stating your request has been completed and a message will be displayed at the bottom of the page.

Click the message which will provide you with details regarding your request and any files that are attached.

To download the files individually, click "Download". If there are multiple files you can also download them as a single "Zip" file'. To do this, click "Download all files in a Zip".

Cora Health advises that you download, save and store locally within 1 month.

Once downloaded you are responsible for the confidential, secure storage of the records, and, when they are no longer required, their secure disposal.