HealthSource v1.0 Release Notes

August 2018

Document History

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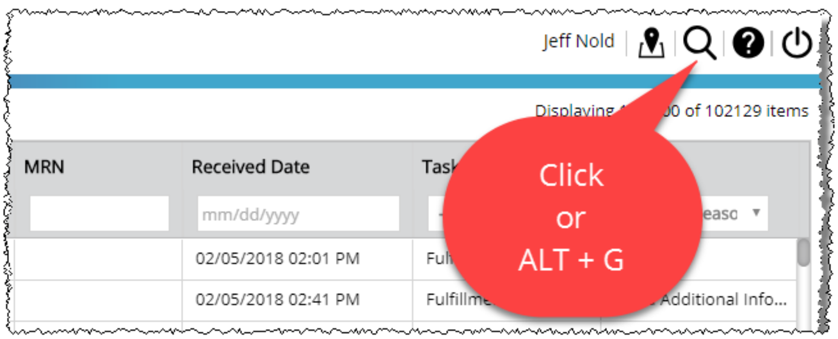
HealthSource Release Notes

This document describes changes made in **HealthSource v1.0**.

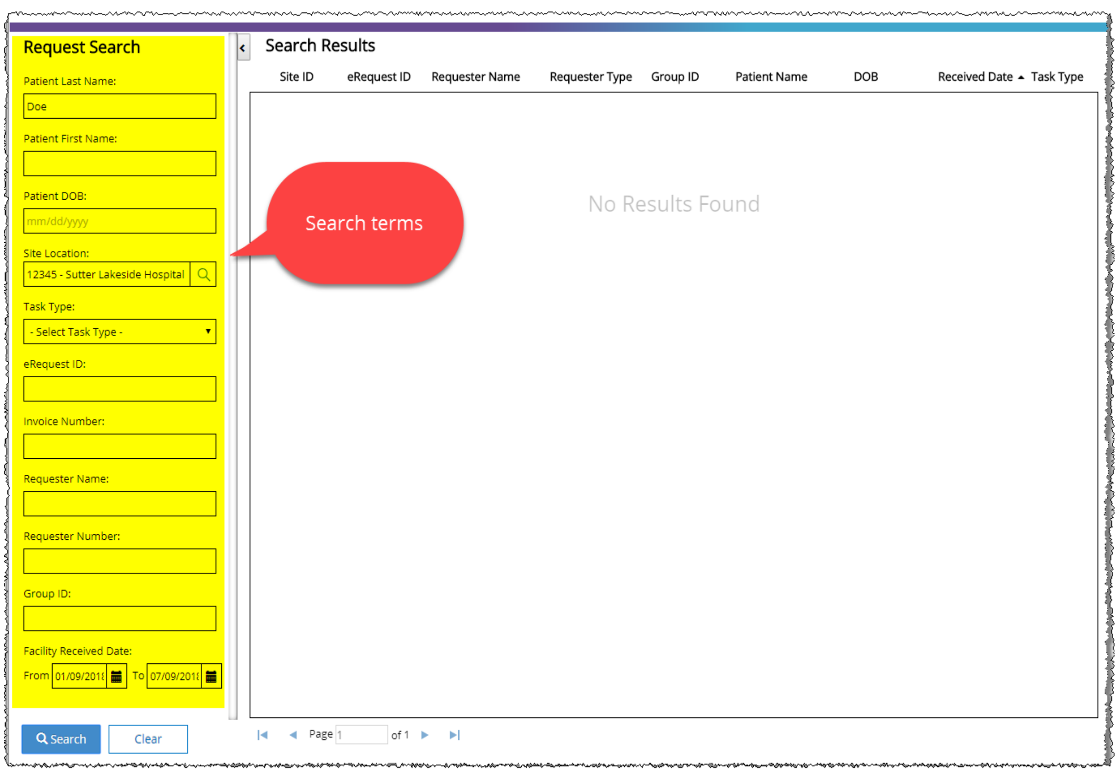
REQUEST SEARCH FOR ALL USERS

The new **Request Search** tool is available to all users. It offers many search fields and allows you to open a read-only version of requests, even after they have been fulfilled.

1. Click the **Request Search** button or press **ALT + G** on your keyboard.

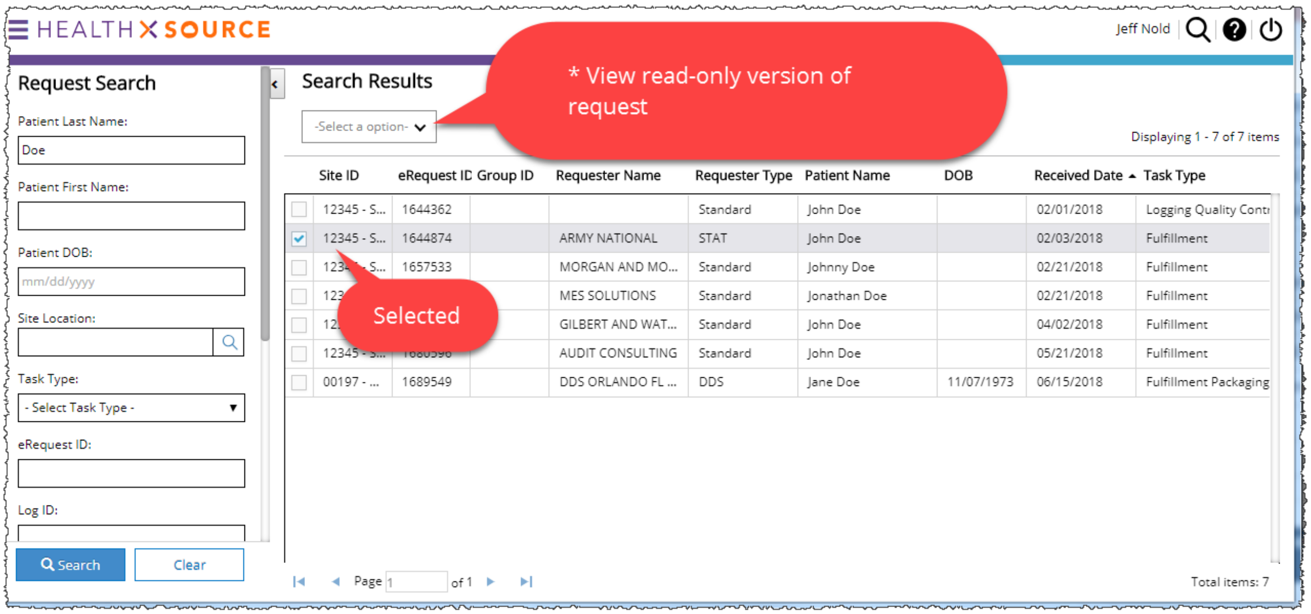


2. On the **Request Search** page, enter the appropriate search terms and click **Search** or press the **ENTER** key.



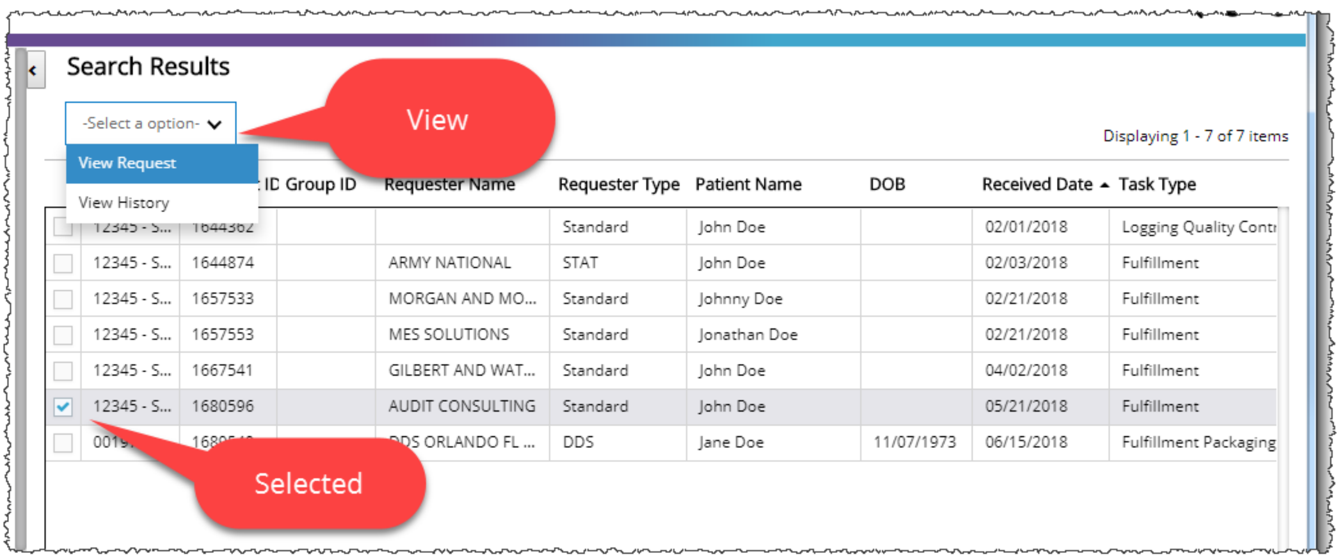
> The **Request Search** finds requests that match **ALL** of your search terms.
>
> Be specific enough to find what you're looking for, but not so specific that you accidentally exclude requests that you'd like to see.

3. The **Search Results** table shows matching requests. Sort by clicking a column label.

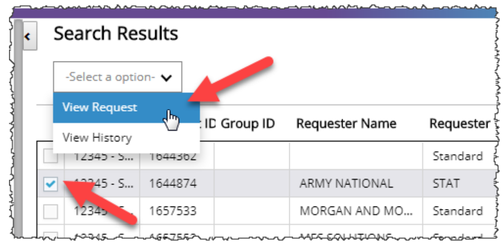


4. To see details about a specific request, select it and choose:

Option	See what?	More info
View Request	Read-only version of request, including available documents: • Request Letter • Medical Records • Correspondence • Invoice	Page 7
View History	Request History	Page 8



View read-only version of any request



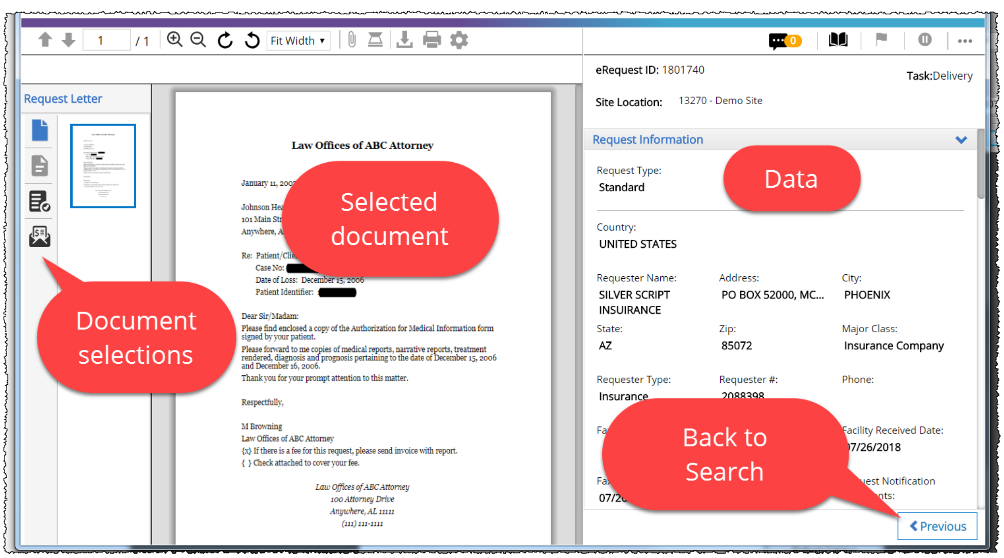
The new **Request Search** tool lets you see the request documents and data, even if it is being worked on by another user or has already left **HealthSource** for back-end processing.

1. Run a **Request Search** (page 4) and choose **View Request**.

2. On the far left side of the screen, select a document to view. By default, the Request Letter appears when you open a request.

Blue	Currently being displayed.	
Black	Available for viewing.	
Grey	Not part of the request.	

3. You cannot edit the request information.



4. To return to the **Search Results**, click the **Previous** button in the bottom right corner of the read-only screen.

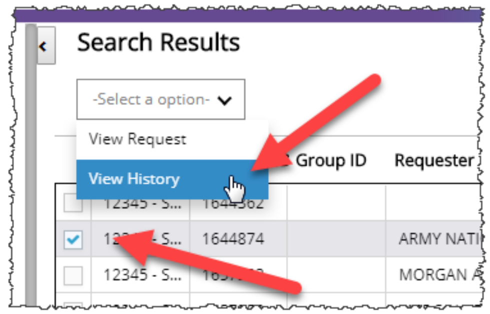
Request History

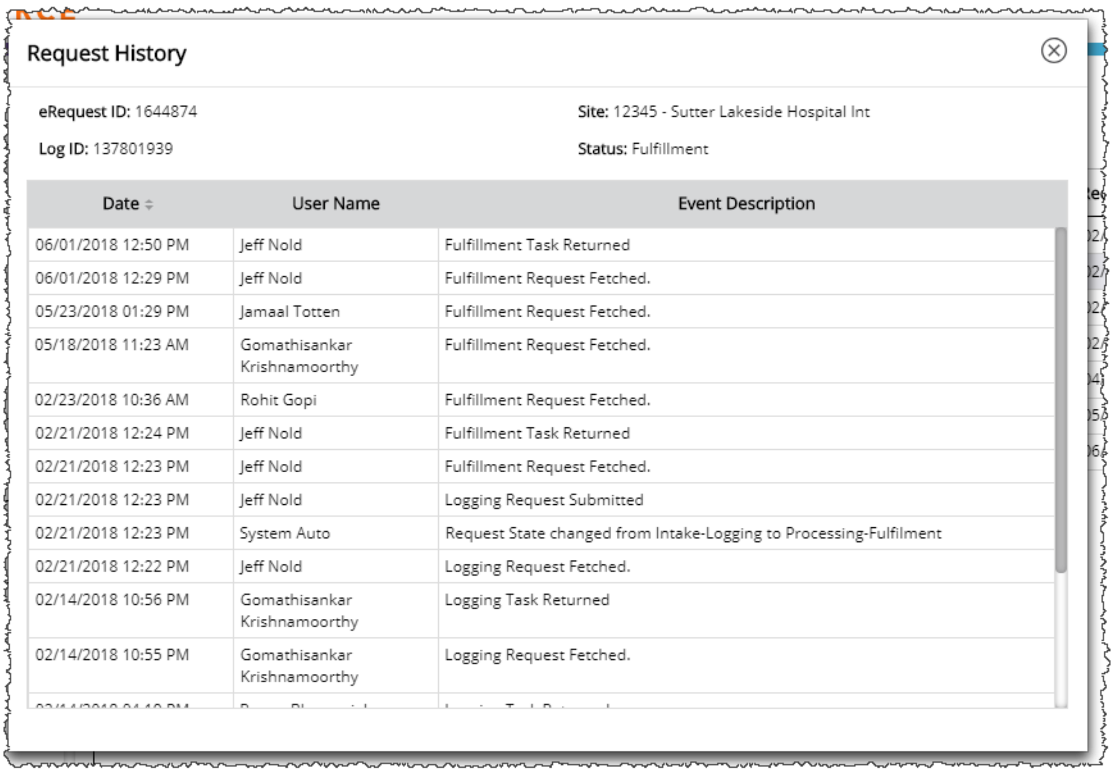
The new **Request Search** tool lets you check the history of a request.

1. Run a **Request Search** (page 4).

2. Select request and choose **View History**.

3. The **Request History** appears in a pop-up window, with events listed from most recent to oldest.




Request History

eRequest ID: 1644874
Site: 12345 - Sutter Lakeside Hospital Int
Log ID: 137801939
Status: Fulfillment

Date	User Name	Event Description
06/01/2018 12:50 PM	Jeff Nold	Fulfillment Task Returned
06/01/2018 12:29 PM	Jeff Nold	Fulfillment Request Fetched.
05/23/2018 01:29 PM	Jamaal Totten	Fulfillment Request Fetched.
05/18/2018 11:23 AM	Gomathisankar Krishnamoorthy	Fulfillment Request Fetched.
02/23/2018 10:36 AM	Rohit Gopi	Fulfillment Request Fetched.
02/21/2018 12:24 PM	Jeff Nold	Fulfillment Task Returned
02/21/2018 12:23 PM	Jeff Nold	Fulfillment Request Fetched.
02/21/2018 12:23 PM	Jeff Nold	Logging Request Submitted
02/21/2018 12:23 PM	System Auto	Request State changed from Intake-Logging to Processing-Fulfilment
02/21/2018 12:22 PM	Jeff Nold	Logging Request Fetched.
02/14/2018 10:56 PM	Gomathisankar Krishnamoorthy	Logging Task Returned
02/14/2018 10:55 PM	Gomathisankar Krishnamoorthy	Logging Request Fetched.

IMPROVED SCREENS AND COMMANDS

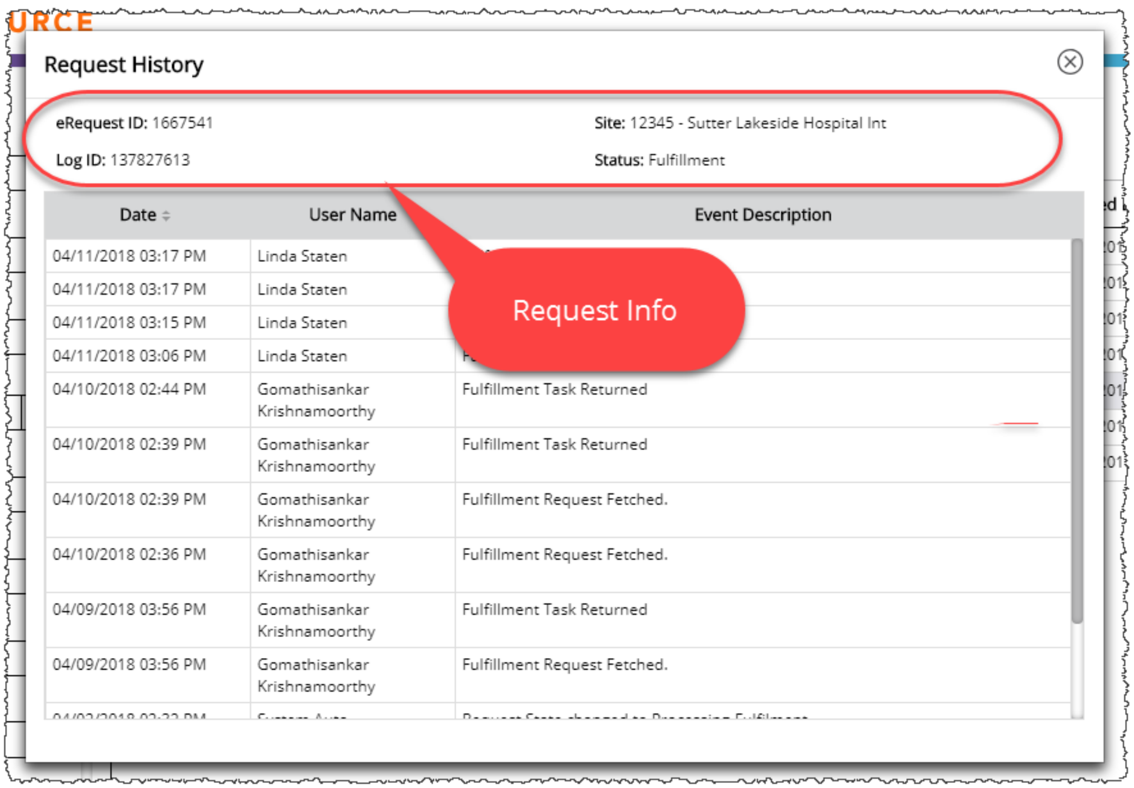
HealthSource v1.0 makes it easier to find key information and complete your tasks:

- More informative Request History
- Additional keyboard shortcuts
- Site, eRequest ID, and Task always visible
- Find requester by name instead of address
- Request commands available for Correspondence
- Medicare Beneficiary Identifier (MIB) field

More informative Request History

The top of the **Request History** window now lists four important details:

- **eRequest ID**
- **Site**
- **Log ID**
- **Status** (Task Type)

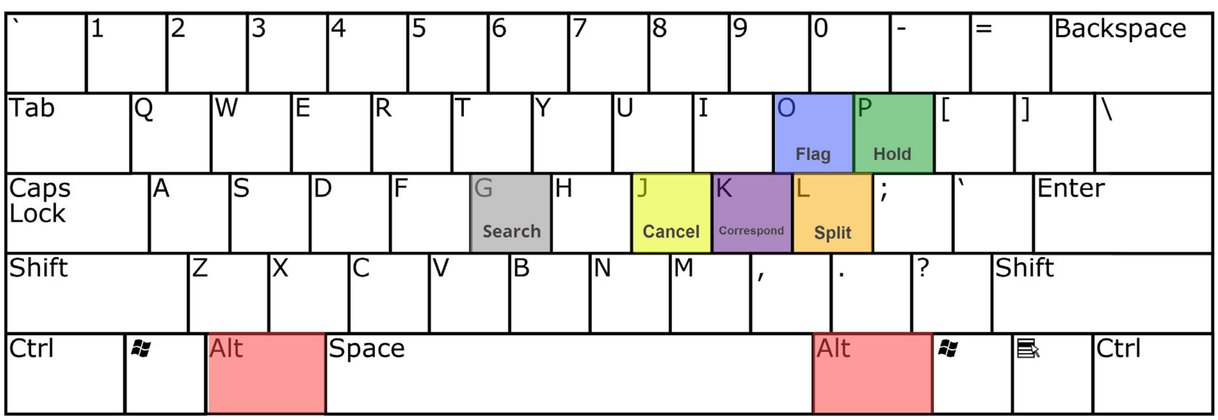


These facts appear no matter how you open the **Request History** — from within the request itself or from the new **Request Search** tool (page 8).

Additional keyboard shortcuts

We've added several new keyboard shortcuts to reduce the need for a mouse.

Command	Press
Put on Hold	ALT + P
Flag as Exception	ALT + O
Cancel request	ALT + J
Create Correspondence	ALT + K
Split request	ALT + L
Request Search (page 4)	ALT + G



Except for **Request Search**, these shortcuts are **NOT** available when:

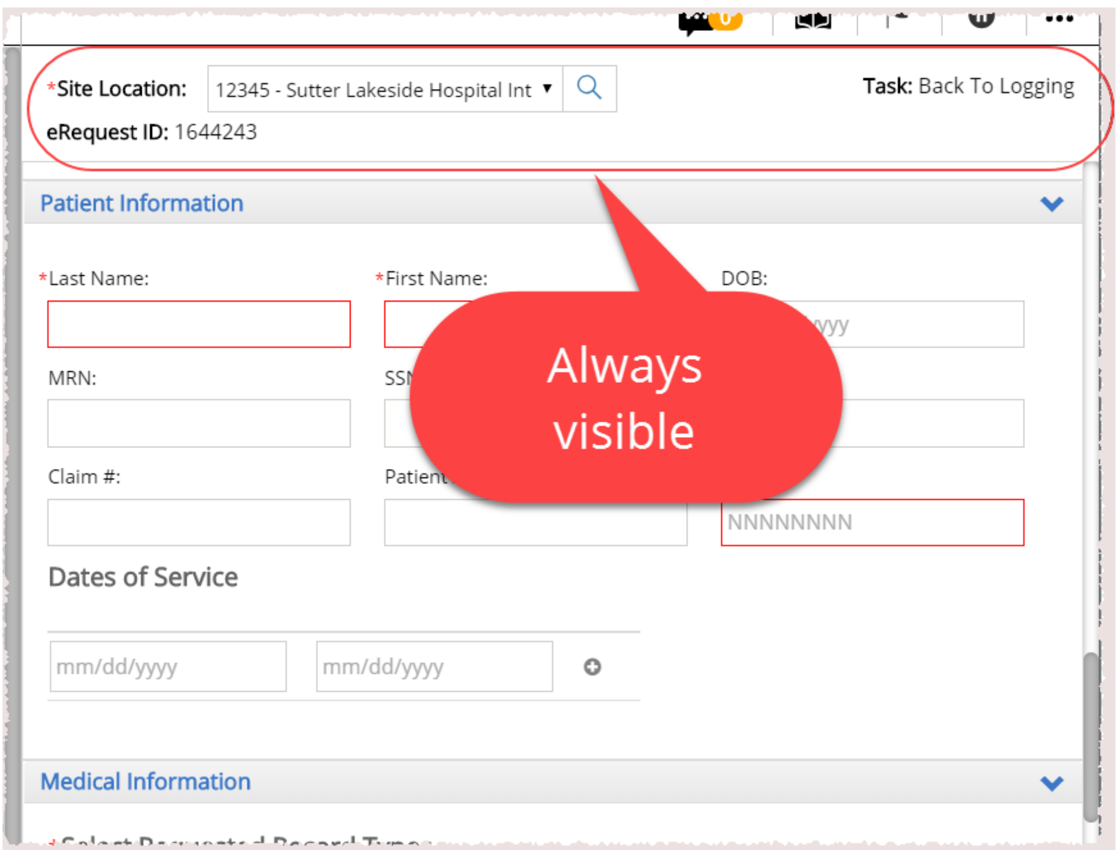
- you're viewing a request in **Read-Only** mode;
- the command doesn't make sense. For example, you can't use the **Put on Hold** command if a request is already **On Hold**;
- the request was created through the manual **Add New Request** command and has not yet been submitted or saved.

Site, eRequest ID, and Task always visible

The key information at the top of the **Data Entry** window is now “fixed” and always visible, even as you scroll down through the data entry fields. This change applies to all requests, whether opened for logging, fulfillment, or another task.

Previously, the **Site Location**, **eRequest ID**, and **Task** information “disappeared” as you moved lower on the screen.

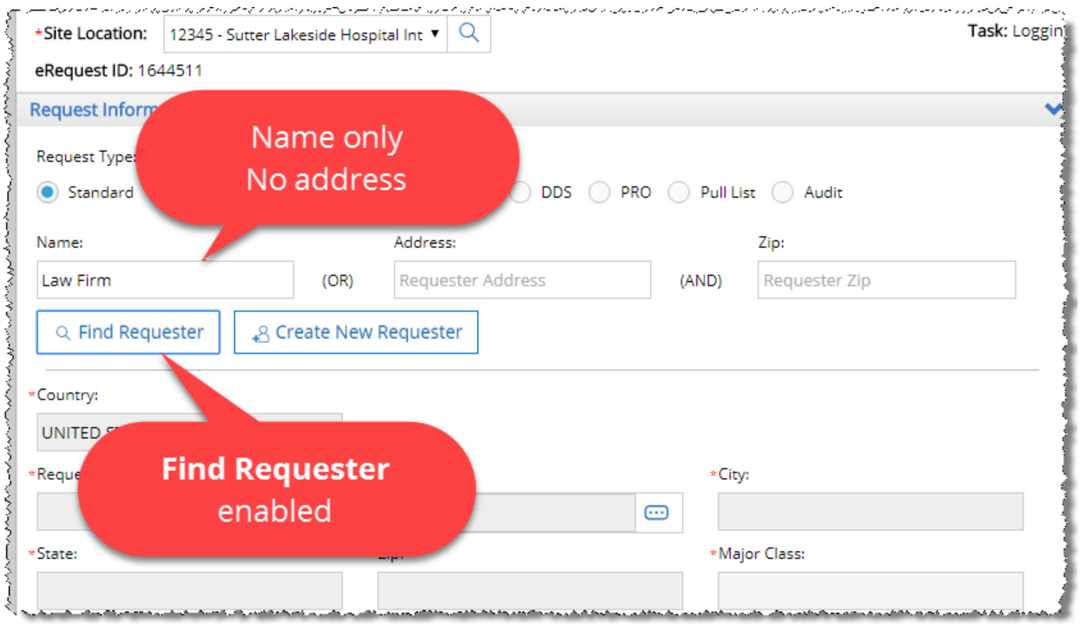
Note that these fields can be seen in the example below, even though the user has scrolled down to the **Patient Information** and **Medical Information** sections, found near the bottom of the **Data Entry** window.



Find requester by name instead of address

You can now search for a requester using only the **Name**, rather than the street **Address** and **Zip**.

Enter at least two (2) characters in the **Name** field to search.



The **Address** and **Zip** fields are no longer marked with a red asterisk, because they're no longer required.

Instead, the **Find Requester** button is enabled when you enter **EITHER** the **Name** **OR** the **Address** and **Zip**.

Request commands available for Correspondence

These commands are now available from the **Create Correspondence** and **Edit Correspondence** screens:

- Comments
- History
- Flag as Exception
- Put On Hold
- More Actions — Cancel Request
- More Actions — Resubmit to Logging *
- More Actions — View Request Letter *
- More Actions — Back to Logging **

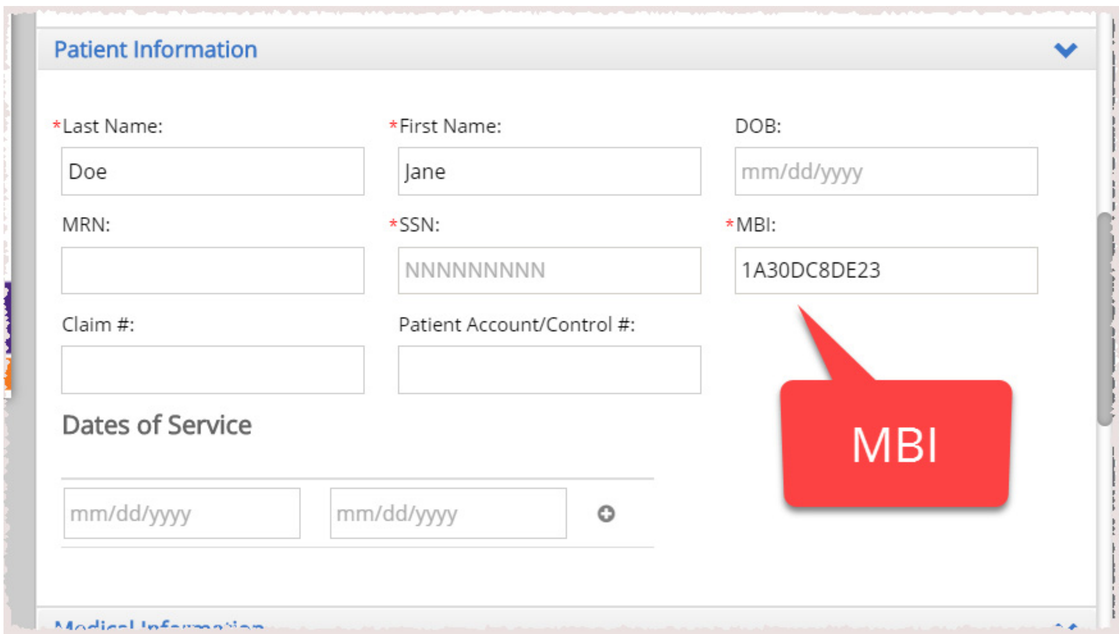
* only available during **Fulfillment**.

** only available when request has been pushed to the **New Requester** team.

Previously, you were forced to exit the **Correspondence** screens, losing any work you'd already done there, before you could use these commands.

Medicare Beneficiary Identifier (MIB) field

If the **Request Type** = **DDS**, you can now enter an **MBI** (Medicare Beneficiary Identifier) value during **Logging**.



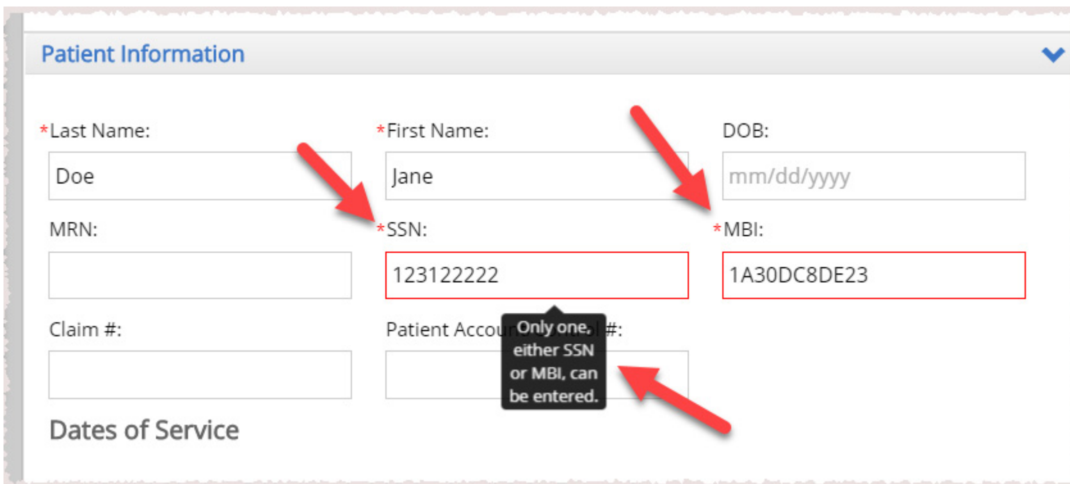
The Centers for Medicare Services (CMS) now identify patients with an **MBI** value instead of the Social Security Number.

Either SSN or MBI, not both

HealthSource still shows the **SSN** field for **DDS** requests.

You can enter **EITHER** the **SSN** or **MBI**, but **NOT** both., even though both fields are marked with a red asterisk *.

We kept both fields because there may be some older **DDS** requests, which identify the patient by **SSN**, that still need to be processed.



MBI Format

The **MBI** is always 11 characters long.

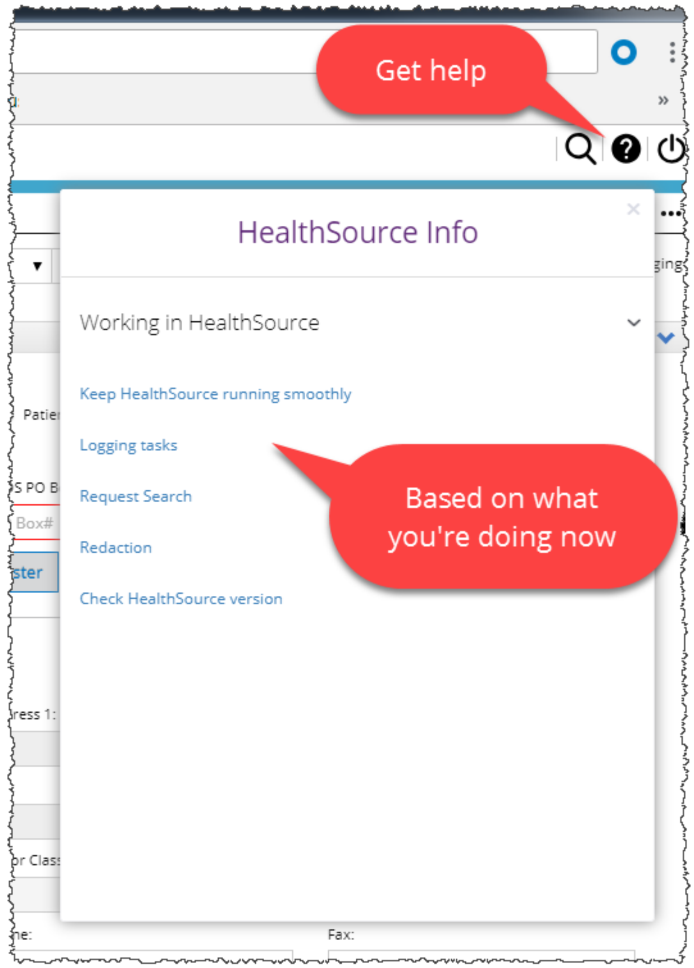
Character	Format
1	1 - 9
2	A - Z, but not S, L, O, I, B, Z
3	0 - 9, A - Z, but not S, L, O, I, B, Z
4	0 - 9
5	A - Z, but not S, L, O, I, B, Z
6	0 - 9, A - Z, but not S, L, O, I, B, Z
7	0 - 9
8	0 - 9, A - Z, but not S, L, O, I, B, Z
9	0 - 9, A - Z, but not S, L, O, I, B, Z
10	0 - 9
11	0 - 9

USER GUIDANCE AVAILABLE THROUGH THE HELP BUTTON

You can now find useful information about how to work in **HealthSource** by clicking the **Help** button.

The Help resources include work instructions, video demos, training material, and Release Notes. We display topics based on what you're doing, but you can also search the entire library.

Previously, the **Help** button launched the most current Release Notes.



Redact Tool

The **Redact** tool lets **Loggers** and **Fulfillers** “white out” information from a Request Letter.

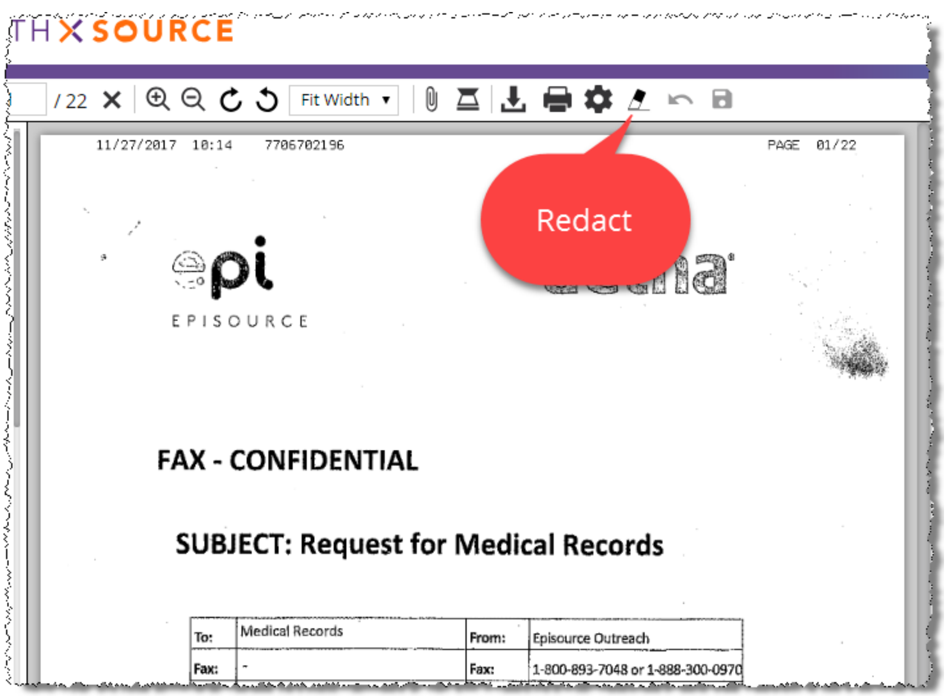
The redacted letter will be sent to the requester along with Medical Records, Invoice, and/ or Correspondence.

1. Check the Request Letter:

    1.1 **Logger**: Use the normal **Document** viewing area.

    1.2 **Fulfiller**: Click the **More Actions** button and select **View Request Letter**.

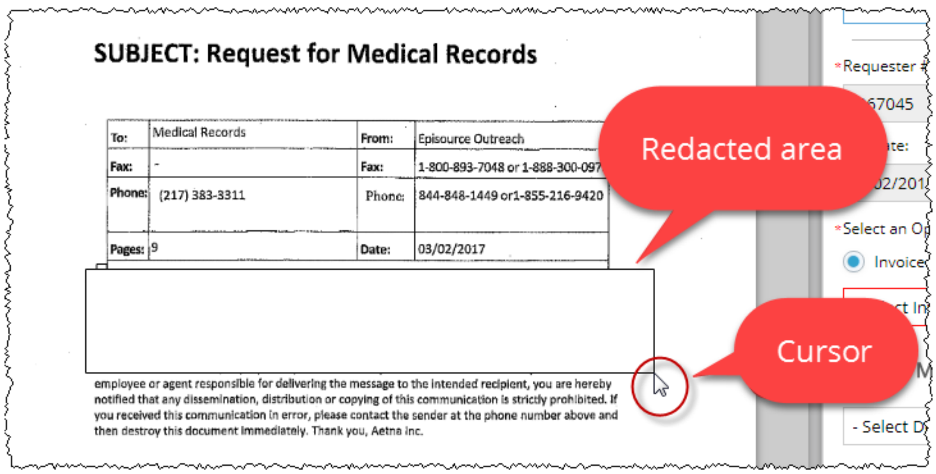
2. Click the **Redact** button, located to the right of the **Settings** button on the **Documents** toolbar.



3. Wait while **HealthSource** loads an editable version of the Request Letter. This step usually takes a few seconds.

4. Hold down the left mouse button and use the cursor to draw a box around the confidential information. White space replaces the area you cover.

5. Release the left mouse button.

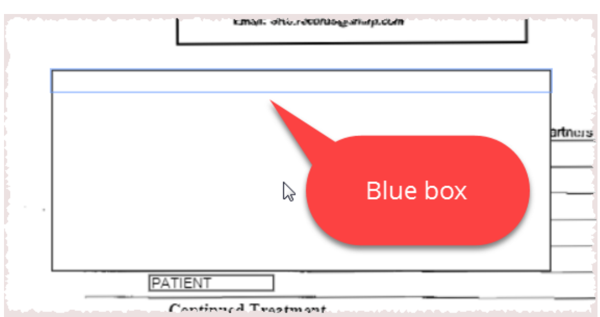


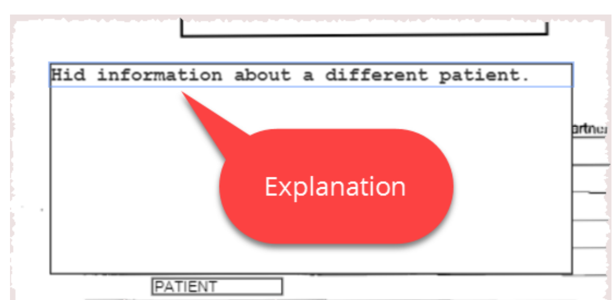
6. **OPTIONAL** — Explain why you redacted the information:

   6.1 Click inside the redacted area.

   6.2 A light blue box appears at the top of the redacted area.

   6.3 Type your explanation inside this box.





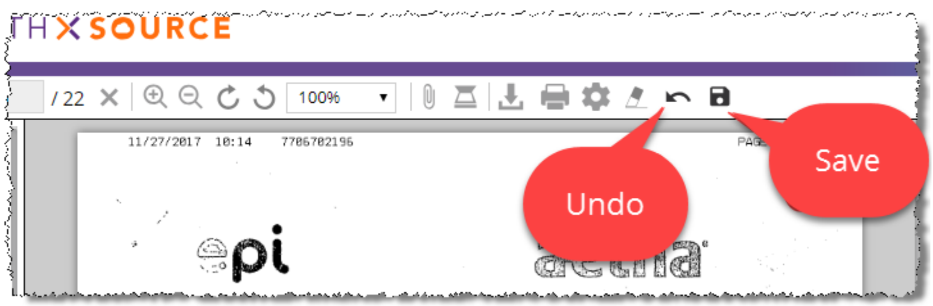
7. Redact more information on the page as needed.

8. Did you correctly redact the needed information?

   8.1 **NO** — Click the **Undo** button and try again. This button only affects redactions, not any data entry you've performed.

   8.2 **YES** — Click the **Save** button.

> After you **Save**, you cannot **Undo** your earlier redactions!



9. You can **Redact** sections on multiple pages of a Request Letter, but you must **Save** the pages as you go.

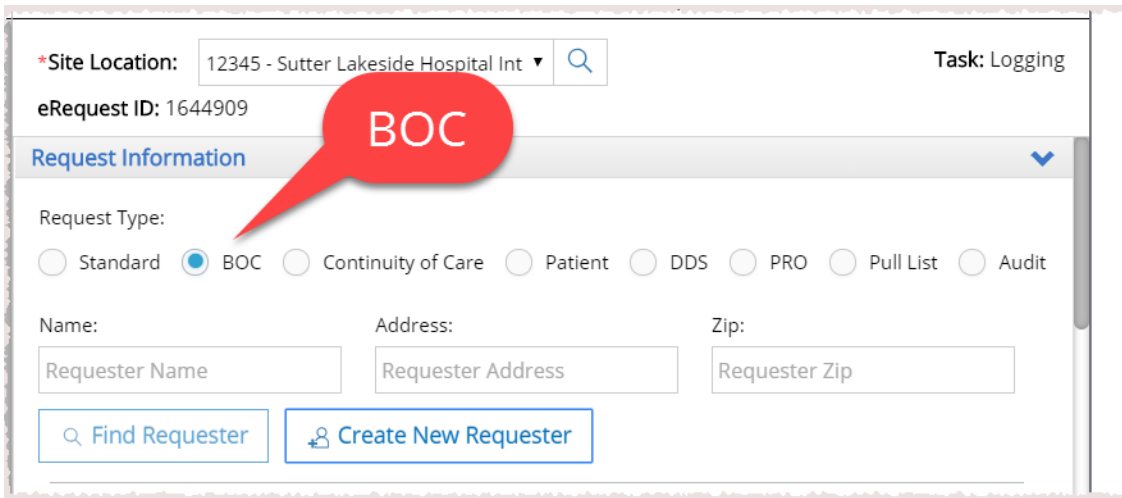
10. The redaction is tracked on the Request Letter and in the **Request History**:

Request History (eRequest ID: 1754950)

Date	User Name	
07/18/2018 12:11 PM	Jeff Nold	Redacted on page: 1
07/18/2018 12:03 PM	Jeff Nold	Logging Request Fetched.
07/18/2018 11:56 AM	Jeff Nold	Logging Task Returned

New Request Type: BOC

HealthSource now offers **BOC** (Business Office Copy) as a **Request Type**.



A Business Office is a group or department at a health care facility which needs access to Medical Records for non-medical reasons. For example, a Business Office might be responsible for reviewing charges or responding to legal claims.

All **BOC** requesters have a **Major Class** of Facility because they make requests on behalf of the health care provider that created the Medical Records.

Ciox Health uses special rules for handling this kind of "internal" request. The new **BOC** option lets us apply these rules at **HealthSource** facilities.

Automated processing for BOC requests

HealthSource automatically fills out some data entry fields if it detects a **BOC** cover sheet.

<table>
<tr><th rowspan="2">Field</th><th colspan="2">Site associated with a single BOC requester in Lawson</th></tr>
<tr><th>Yes</th><th>No</th></tr>
<tr><td>Request Type</td><td>BOC.</td><td>BOC.</td></tr>
<tr><td>Requester</td><td>Automatically selected.

Can override by using the Find Requester command, but should not be needed.</td><td>Use Find Requester command.

See page 24 for details.</td></tr>
<tr><td>Requester Details</td><td colspan="2">Hidden, except for:
•Requester #
•Request Letter Date
•Facility Received Date
•Fax Date
•Requester Notification
•No Of Days To Complete</td></tr>
<tr><td>Invoice Type

Reason for Request</td><td colspan="2">05 Business Office

Business Office Copy / Risk Management

You can switch between Invoice Type and Reason for Request, but you cannot change the selections themselves.</td></tr>
<tr><td>Bill To</td><td>Displayed, cannot be changed.</td><td>Hidden.</td></tr>
<tr><td>Ship To</td><td>Empty.

Can be filled out.</td><td>Hidden except:
• Requested By
• ATTN</td></tr>
<tr><td>Delivery Method</td><td>• Mail
• Electronic</td><td>Electronic.

Cannot be changed.</td></tr>
</table>

Site not assigned to a single BOC requester

Site not assigned to a single BOC requester

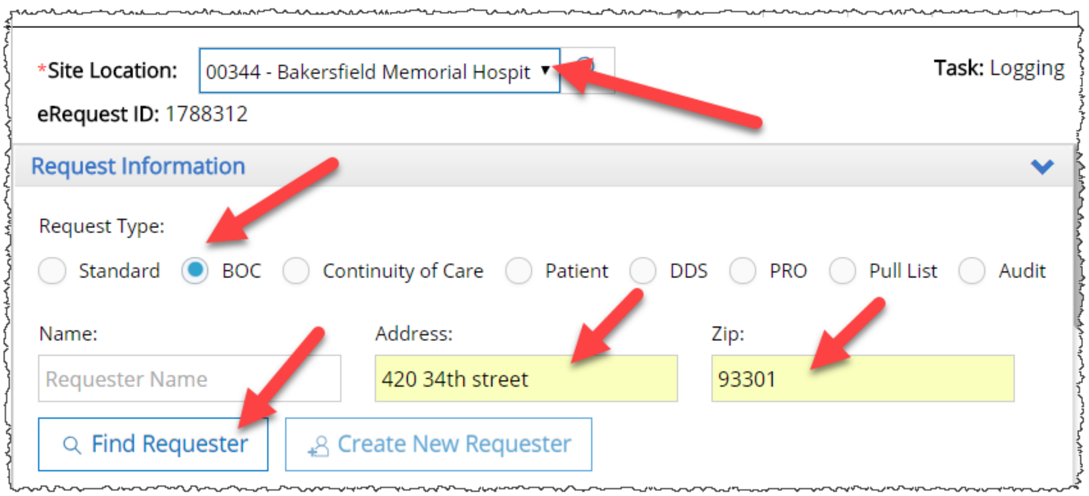
Some sites are not linked to a single **BOC** requester. The requests still include a **BOC** cover sheet, but **HealthSource** cannot pick the requester automatically.

In these cases, **Loggers** and **Fulfillers** must use the **Find Requester** command to identify the “right” BOC.

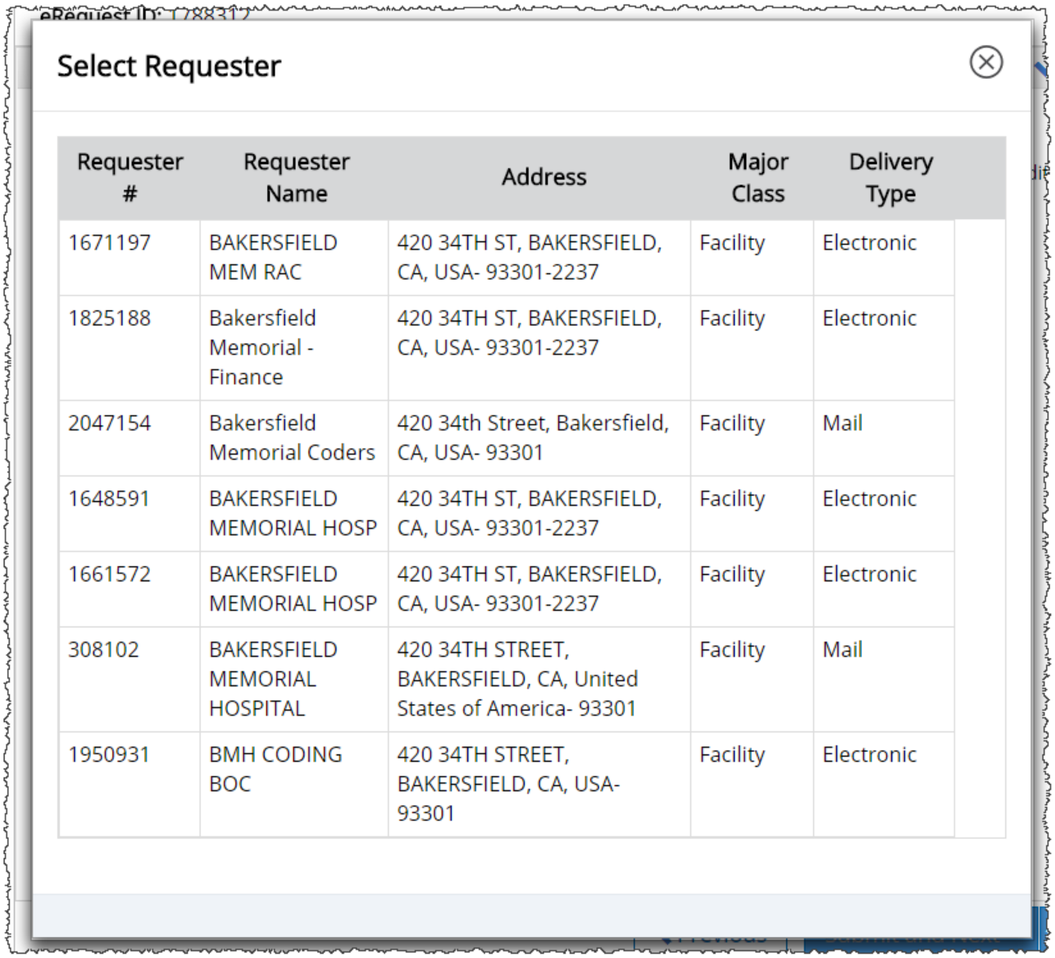
1. Select the **Site Location** for the request.

2. Make sure the **Request Type** = **BOC**.

3. Enter the **Name** or **Address / ZIP** and click **Find Requester**.



4. Pick the appropriate choice from the **Select Requester** list. This popup will not appear if there is only one match with a **Major Class** of Facility.

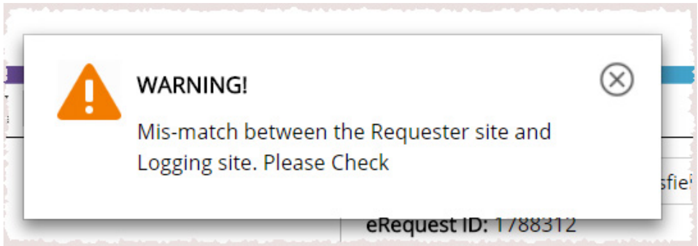

Select Requester

Requester #	Requester Name	Address	Major Class	Delivery Type
1671197	BAKERSFIELD MEM RAC	420 34TH ST, BAKERSFIELD, CA, USA- 93301-2237	Facility	Electronic
1825188	Bakersfield Memorial - Finance	420 34TH ST, BAKERSFIELD, CA, USA- 93301-2237	Facility	Electronic
2047154	Bakersfield Memorial Coders	420 34th Street, Bakersfield, CA, USA- 93301	Facility	Mail
1648591	BAKERSFIELD MEMORIAL HOSP	420 34TH ST, BAKERSFIELD, CA, USA- 93301-2237	Facility	Electronic
1661572	BAKERSFIELD MEMORIAL HOSP	420 34TH ST, BAKERSFIELD, CA, USA- 93301-2237	Facility	Electronic
308102	BAKERSFIELD MEMORIAL HOSPITAL	420 34TH STREET, BAKERSFIELD, CA, United States of America- 93301	Facility	Mail
1950931	BMH CODING BOC	420 34TH STREET, BAKERSFIELD, CA, USA- 93301	Facility	Electronic

5. Is the requester you selected valid for the site?

   5.1 **YES** — **HealthSource** fills out the data entry fields as described on page 23.

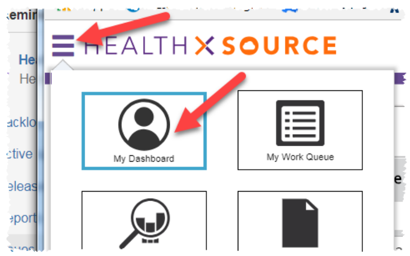
   5.2 **NO** — You're prompted to choose a different requester. You may need to change your search values and use **Find Requester** again.



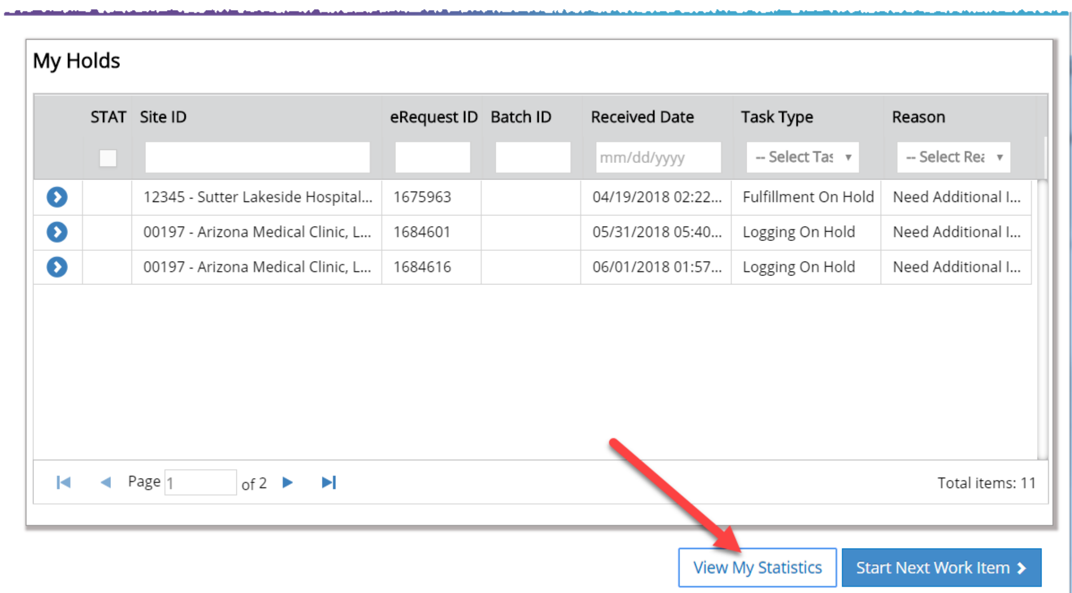
Track Logger performance

Loggers can now track their own productivity over the last seven (7) days.

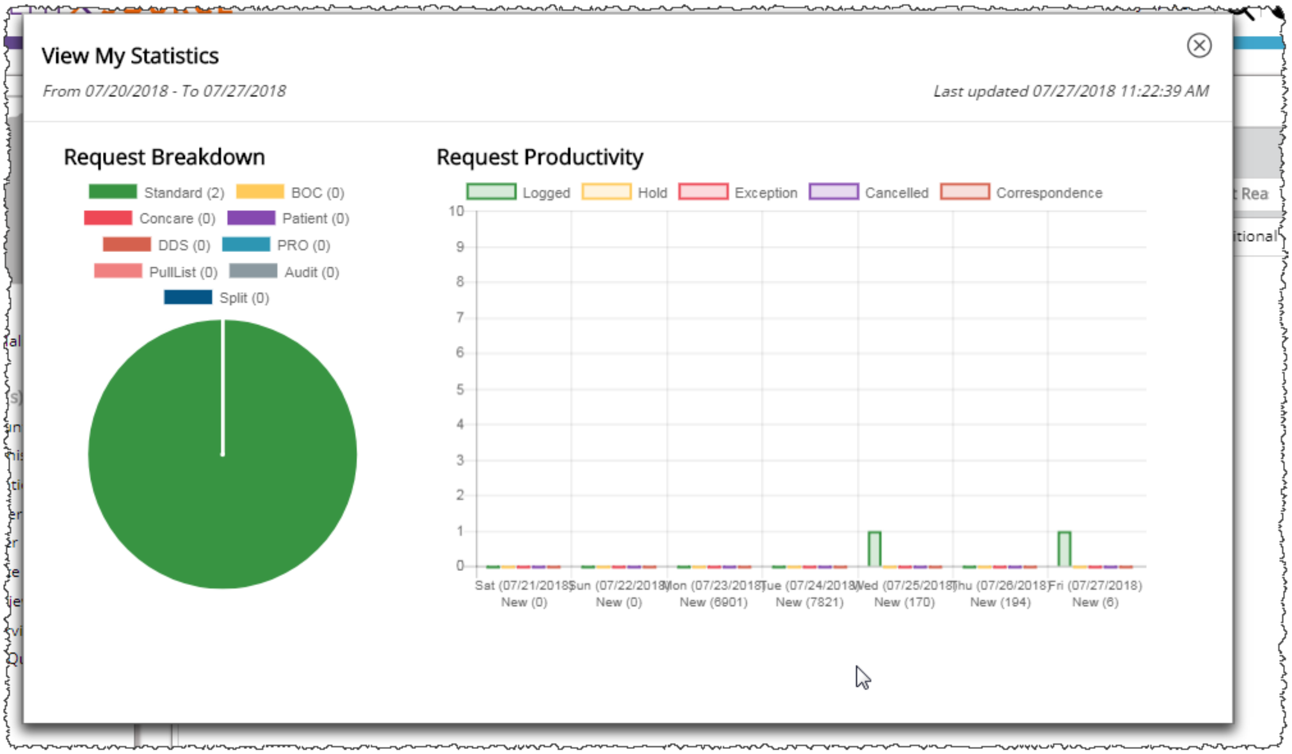
1. From the **Menu**, click **My Dashboard**.



2. On **My Dashboard**, click **View My Statistics**.



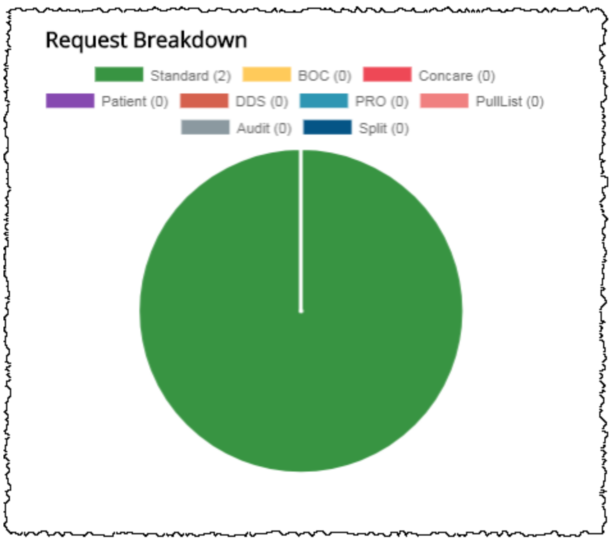
3. The **View My Statistics** screen appears.



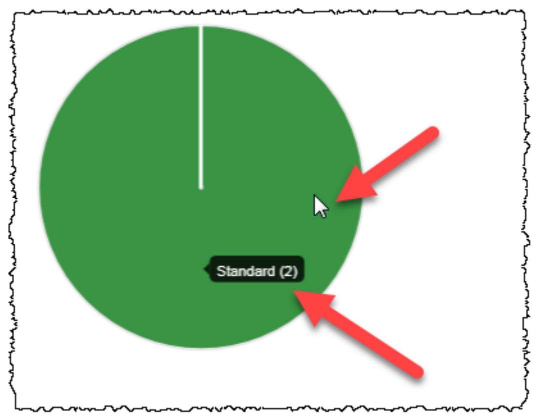
Request Breakdown Chart

This chart shows your logging activity over the last seven (7) days, broken down by **Request Type**.

Each **Request Type** logged in the past 7 days is represented by an individual slice in the pie chart.



To see the numeric count for a specific Request Type, "hover" your cursor over a "slice" of the pie chart.

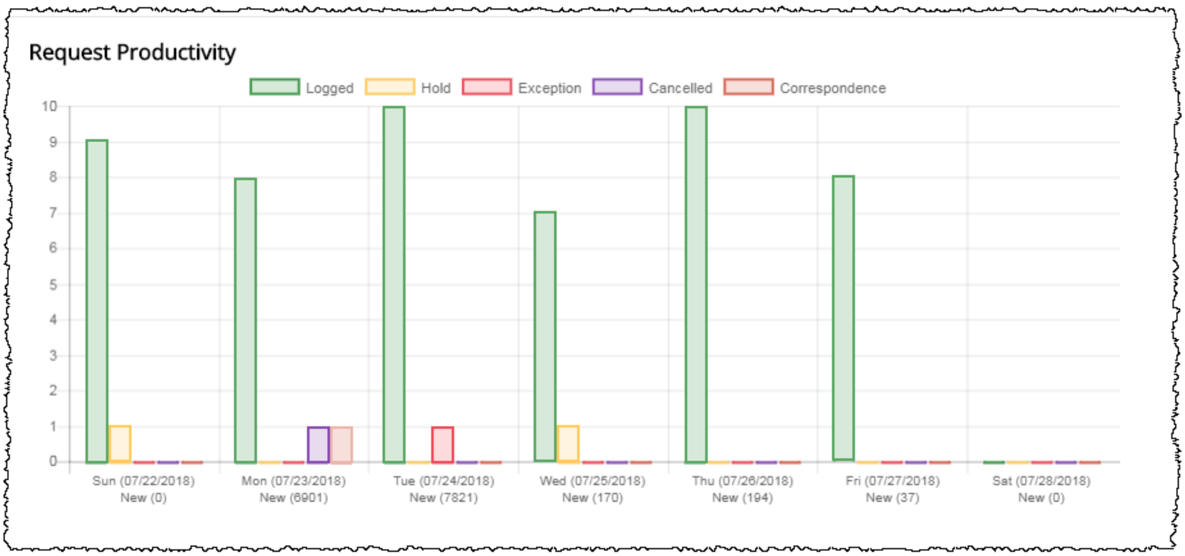


What counts?	For a request to be counted, you must have completed any one of these actions: • Submitted the request • Canceled (deleted) the request • Sent Correspondence
Pull Lists	Completing one (1) Pull List = 1 request, regardless of how many patients it contained.
Split	Splitting = 1 request, regardless of how many requests were created.

Request Productivity Chart

This chart measures your logging activity over the last seven (7) days, broken down by how you handled the requests:

- Logged (Submitted for Fulfillment)
- Hold
- Exception
- Cancelled
- Correspondence



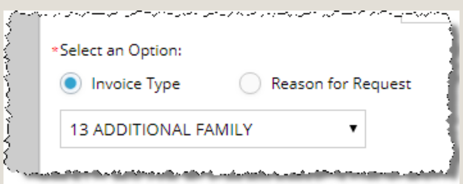
"Hover" your cursor over a day to see a count of your activity for that day:

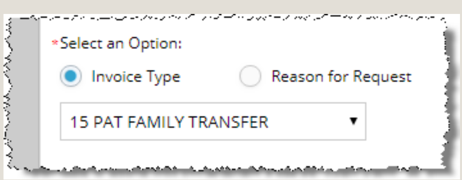
Better handling of Family requests

This change affects **Patient** requests that are made by a **Family** member.

The **Ship To** address is now linked to the “family” choice made in the **Invoice Type** or **Reason for Request** field(s).

<table>
<tr><th rowspan="2">Invoice Type</th><th colspan="2">Reason for Request</th><th rowspan="2">Ship To editable?</th></tr>
<tr><th>Primary</th><th>Secondary</th></tr>
<tr><td>13 Additional Family</td><td>Family</td><td>Family Personal</td><td>No

Requested By and ATTN can be entered or changed.</td></tr>
<tr><td>
</td><td colspan="3">
</td></tr>
<tr><td>15 PAT Family Transfer</td><td>Family</td><td>Family Transfer</td><td>Yes

Bill To address required.</td></tr>
<tr><td>
</td><td colspan="3">
</td></tr>
</table>

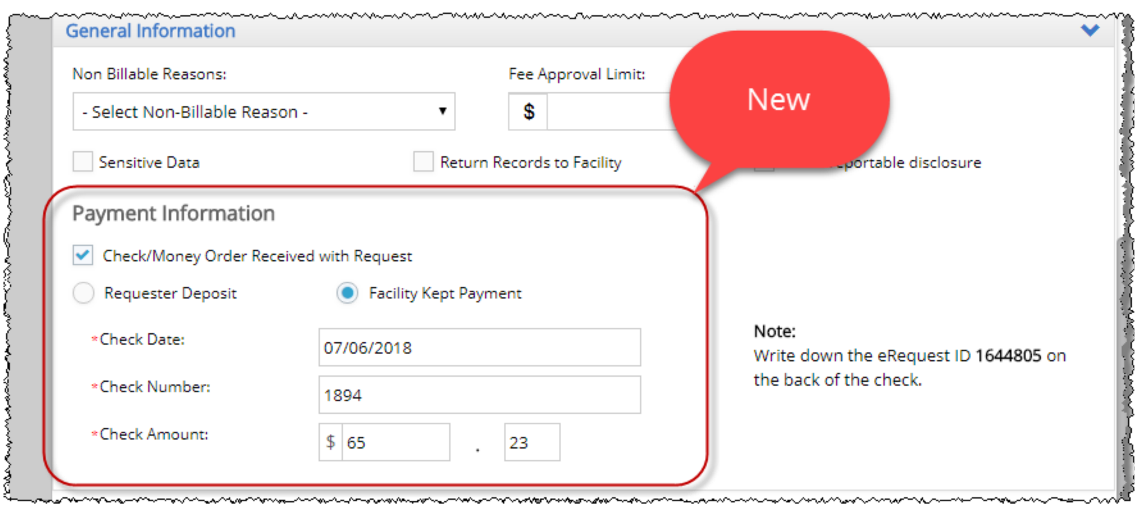
In previous versions, the **Ship To** fields for requests made on behalf of family members were never editable.

CAPTURE ON-SITE PAYMENT INFORMATION

The new **Payment Information** section, located at the bottom of the **Data Entry** window, lets you capture details about payments made by the requester at the facility.

These fields are not available if a **Non-Billable Reason** has been selected.

Check/Money Order Received with Request	Check this box to enabled the other **Payment Information** fields.
Requester Deposit	The requester provided a deposit, which may or may not cover all charges.
Facility Kept Payment	The payment was made to the facility, not Ciox Health.
Check Date	Date written on the check or money order.
Check Number	Identification number on check or money order.
Amount	Monetary value of the check or money order.



When accepting an onsite payment, write the **eRequest ID** number on the back of the check or money order.

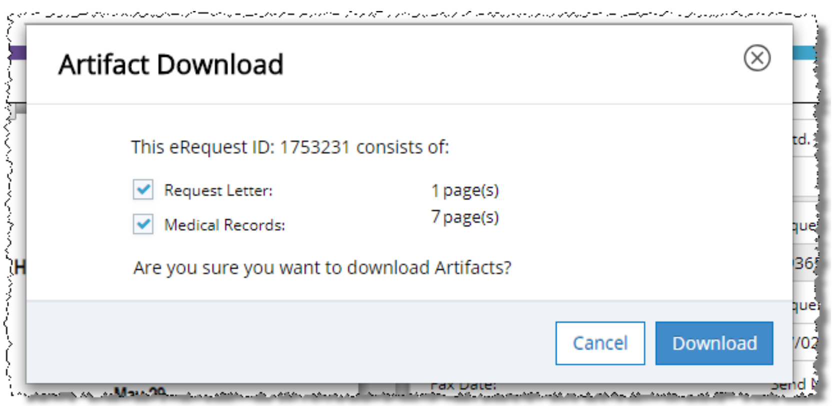
SUPPORT ON-SITE DELIVERY BY DISC OR FLASH DRIVE

HealthSource now allows you to track how many electronic storage devices (CD, DVD, or Flash Drive) were needed to save the Medical Records for an on-site delivery.

1. Open a request for **Fulfillment** and add the Medical Record pages.

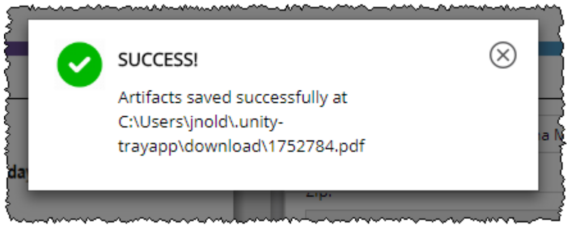
2. Click the **Download Artifacts** button.

3. On the **Artifact Download** window, select the documents to save to your local computer. A request **MUST** include the Request Letter.

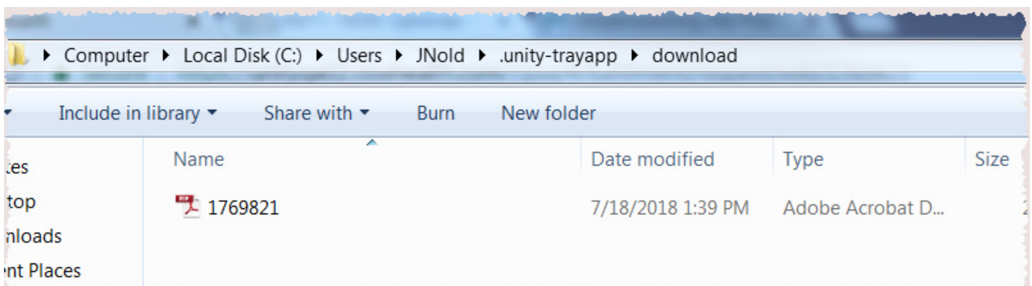


4. **HealthSource** saves the specified documents to this folder:

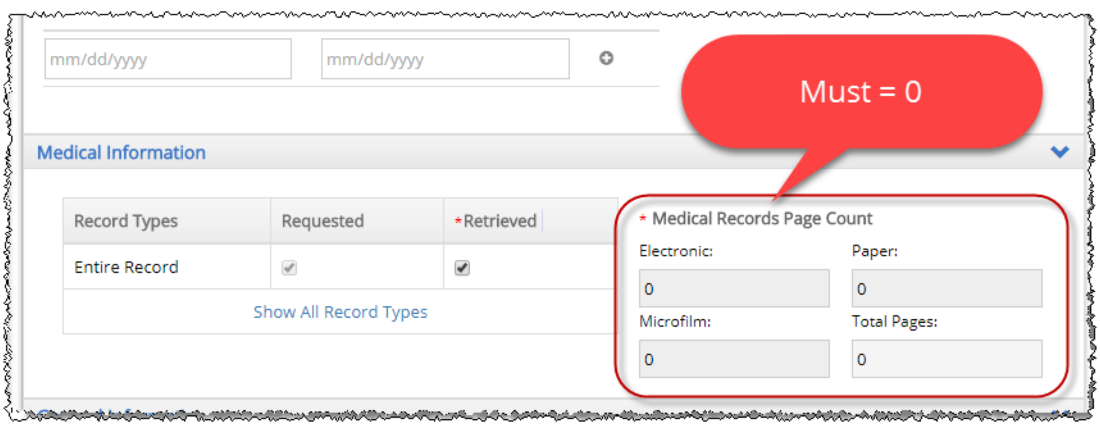
C:\Users\<username>\.unity-trayapp\download



5. Copy the PDF from your hard drive to the disc(s) or Flash Drive(s).



6. Clear the **Medical Records Page Count** fields. These fields **MUST** all show **0** pages before you can continue.



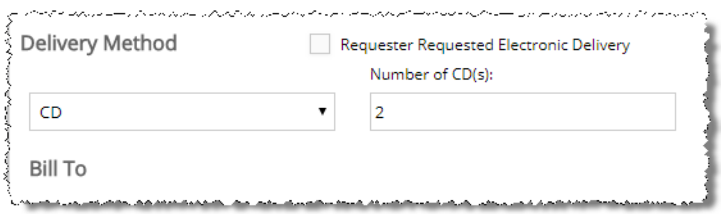
7. Select the correct **Delivery Method**:

    7.1 CD

    7.2 DVD

    7.3 Flash Drive

8. Fill out the **Number of (Media)** field. In the following example, 2 CDs were needed.



9. **Submit** the request.

NEW REQUESTER ENHANCEMENTS

HealthSource v1.0 adds two helpful tools for **New Requester** team members:

- Back to Logging / Back to Fulfillment commands
- Add New Requester directly in HealthSource

See pages 37 through 40 for details on these tools.

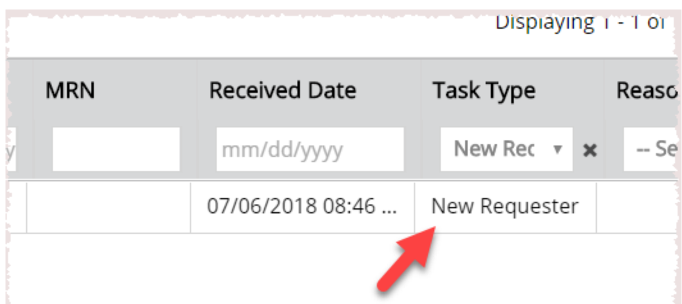
Back to Logging / Back to Fulfillment commands

New Requester users can now send a request **Back to Logging** or **Back to Fulfillment**, whether or not they:

- Assigned a requester;
- Filled out required data entry fields unrelated to the requester;
- Added required documents.

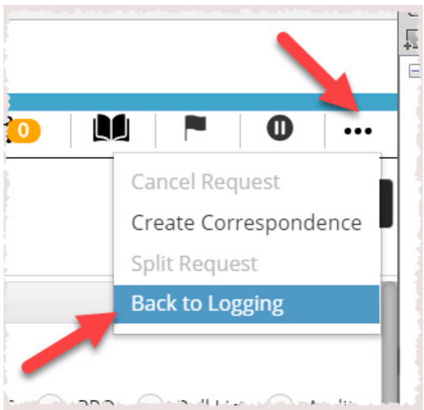
Previously, **New Requester** team members had to assign a requester **AND** complete any required data entry or document capture before they could **Submit** the request. Only then would the request move to the next step of the workflow.

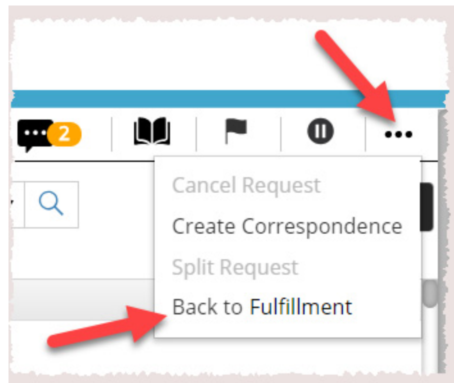
1. Open a request with a **Task Type** of New Requester. You must be assigned to the **New Requester** role to see these requests.



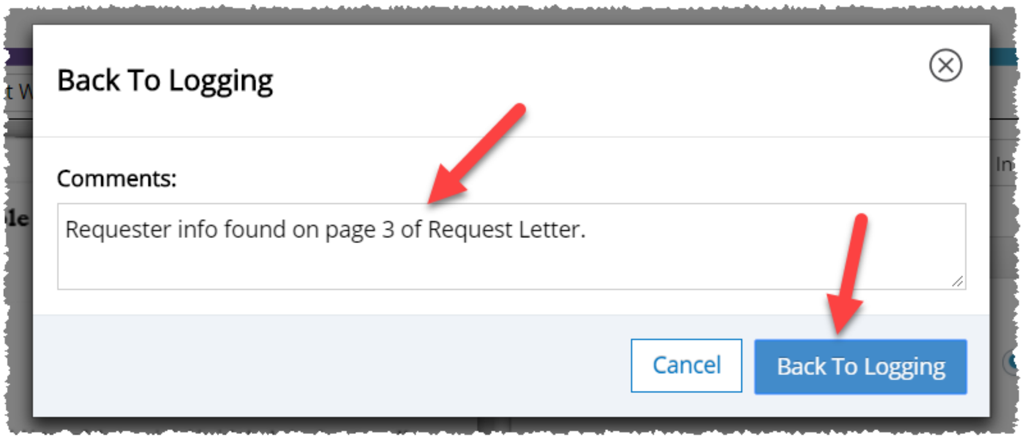
2. Evaluate the Request Letter and assign the correct requester. If the requester does not already exist, you can now add one directly in **HealthSource** (page 40).

3. Click the **More Actions** button and select the **Back to...** command. The name of this command depends on whether a **Logger** or **Fulfiller** sent the request to the **New Requester** team.





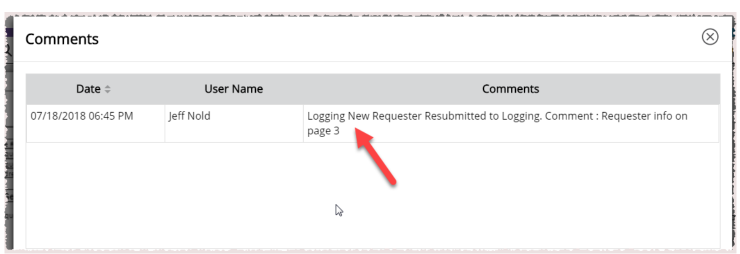
4. Add a **Comment** on the **Back To...** window, then click the **Back To...** button. A **Comment** is required.

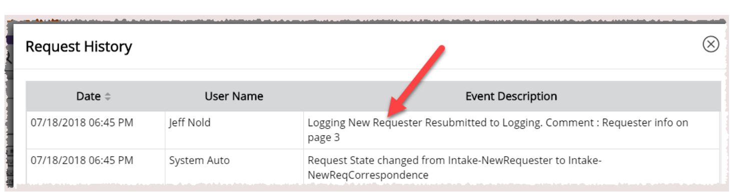


5. The request's **Task Type** changes to reflect the next step:

Sent to New Requester from....	Task Type after	Can be opened by
Logging	Back to Logging	Loggers
Fulfillment	Back to Fulfillment	Fulfillers

6. The **Comment** from Step 4 can be seen in the **Comments** and the **Request History**:



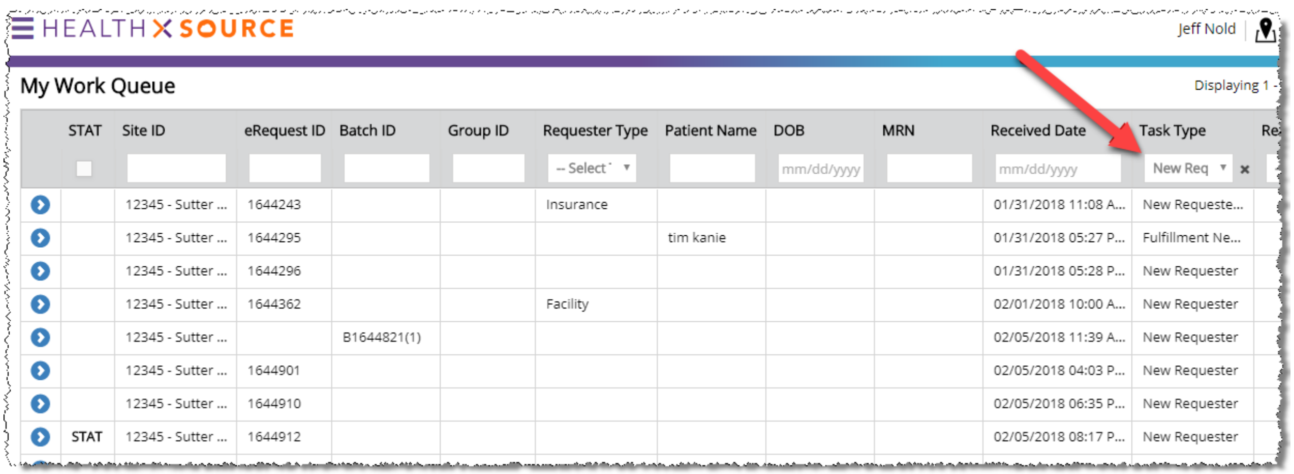


ciox HEALTH

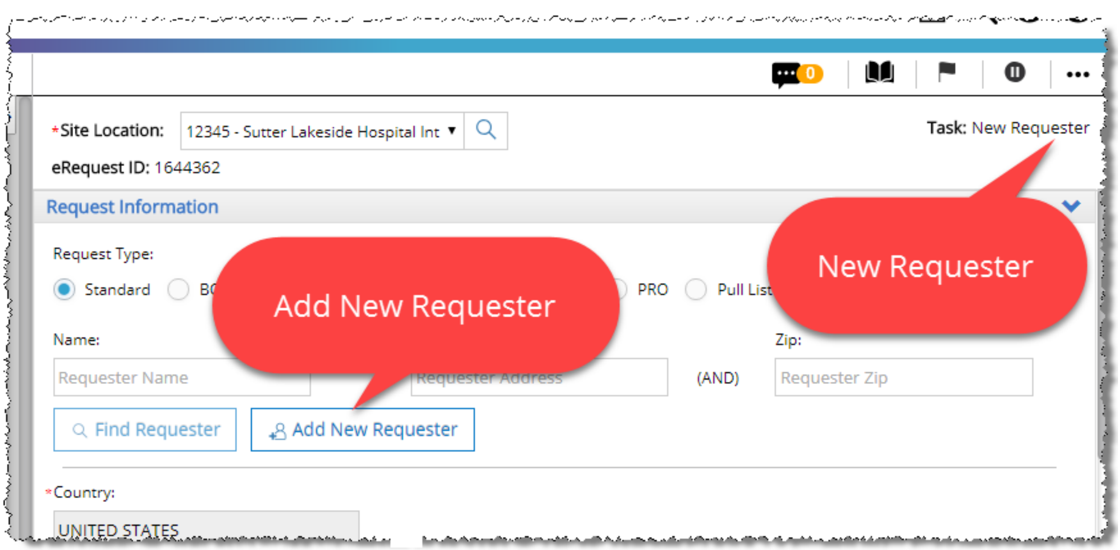
Add New Requester directly in HealthSource

Users assigned to the **New Requester** role can now create requesters directly in **HealthSource**, without using another Ciox Health application.

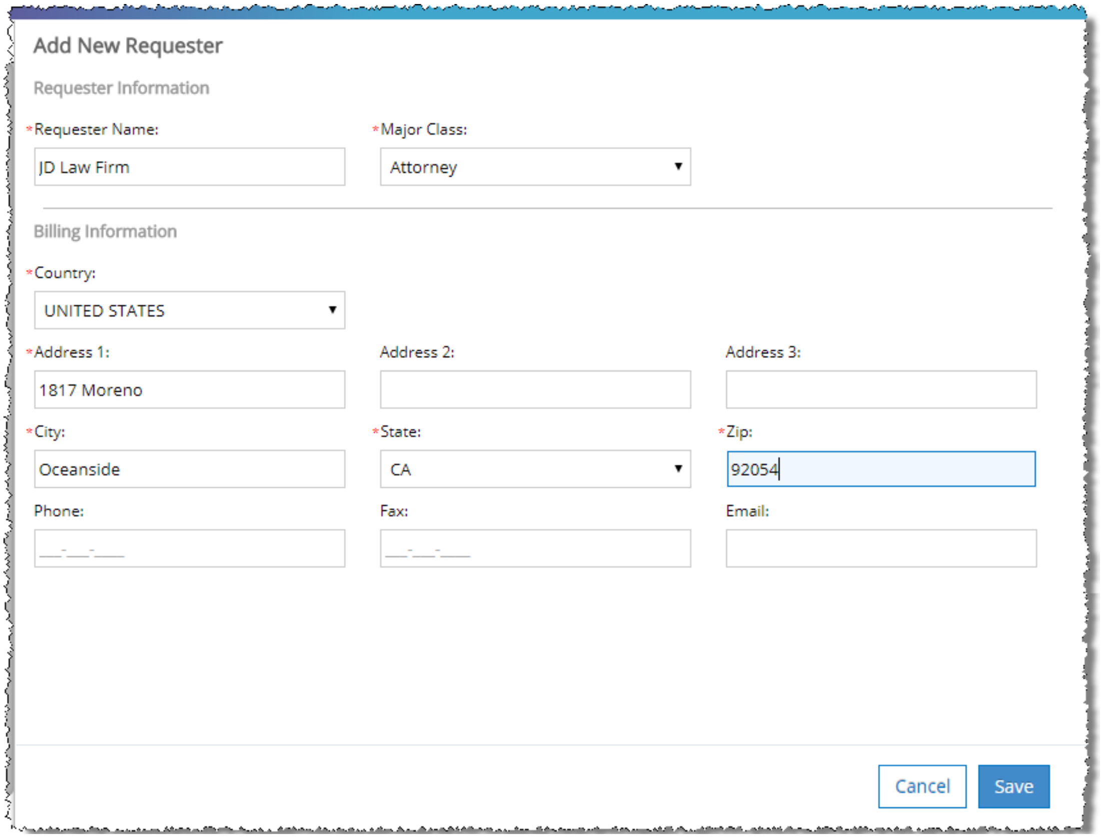
1. Open a request with a **Task Type** of New Requester.

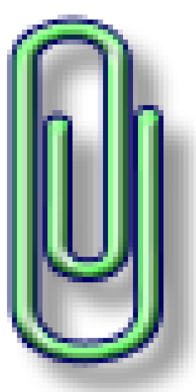


2. Click the **Add New Requester** button.

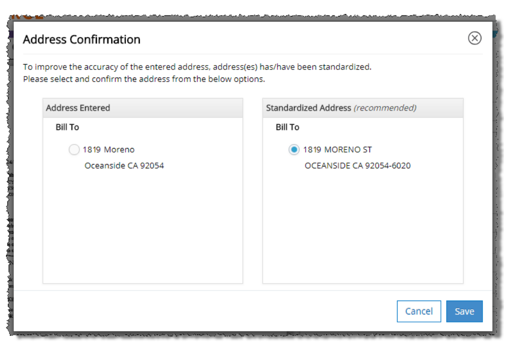


3. On the **Add New Requester** screen, fill out the required data entry fields and click **Save**.

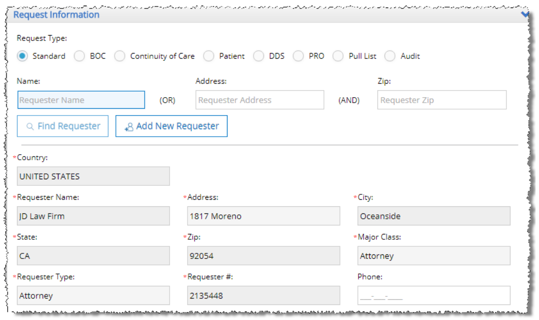
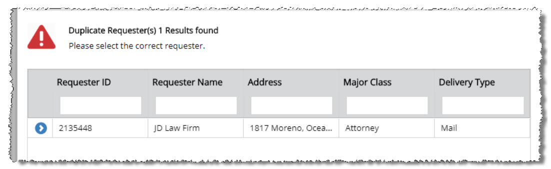




If a standardized version of the address is available, you'll be prompted to use it.



4. **HealthSource** checks for possible duplicate requesters:

<table>
<tr><th>No duplicates</th><th>Possible duplicates</th></tr>
<tr><td>
</td><td>
</td></tr>
<tr><td>1. Requester fields filled automatically.
2. Click Save and Close.</td><td>1. Review the list of possible duplicates.
2. Click the correct requester.
3. Requester fields filled automatically.
4. Click Save and Close.</td></tr>
<tr><td colspan="2">Use the appropriate Back To.... command (page 37).</td></tr>
</table>

CREATE SEARCHABLE REQUEST LETTERS FROM UPLOADS AND EMAILS

IF

you upload a PDF file using the **Upload Request Letters** command;

OR

send the Request Letter as a PDF via email to intake@cioxhealth.com;

THEN

the PDF will be readable during **Logging** and **Fulfillment**.

Before v1.0, these PDF files were "static" and the Request Letter text was not readable, which made the upload and email workflows less efficient.

INDIRECT CHASE UPLOAD TOOL

The **Indirect Chase** tool lets you create a batch of requests by uploading a properly formatted Excel XLSX file.

Advantages

- Every request created through **Indirect Chase** appears in **HealthSource** with a **Task Type** of Fulfillment.
- No manual **Logging** is needed.
- The single PDF file uploaded along with the XLSX file acts as the Request Letter for each request.

Overview

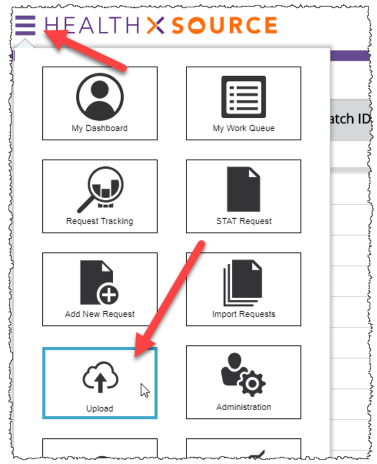
# of requests per file	There is no technical limit on how many requests can be contained in a single XLSX file. The process has been successfully tested with 30K requests per file.
Common Request Letter for all requests	You upload a single PDF file to act as a Request Letter for all the requests in the XLSX. The **Indirect Chase** tool validates that you've selected a PDF file, but does not check its formatting or information. Typically, this Request Letter is a generic document. It may refer to the XLSX file name and the site(s) at which the records are located, but it should **NOT** list patient information.
User roles	You must be assigned to the **Account Manager** role to access the **Indirect Chase** tool. You must also be assigned to the **Logger** and / or **Fulfiller** role so that you can log into **HealthSource** itself.

Formatting requirements for XLSX file

The XLSX file must include these column headers. The columns can be in any sequence, but no columns can be missing:

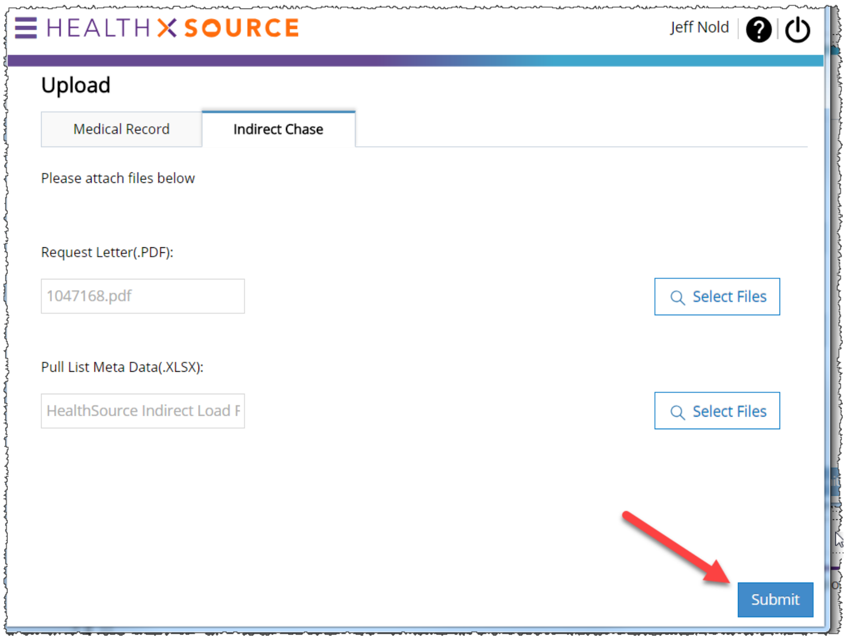
PULL_LIST_ID	MEMBER_FIRST_NAME
REQUESTOR	MEMBER_MI
SCHEDULED_DUE_DATE	MEMBER_LAST_NAME
PROCESSING_CUST_ID	MEMBER_DOB
DESTINATION_CUST_ID	DOS_START
OBO_REQUESTOR	DOS_END
INVOICE_TYPE	CHASE_NOTES
CIOX_SITE_ID	CHART_ELEMENTS
CIOX_SITE_NAME	MEASURE1
REQ_FACILITY_NAME	MEASURE1_CHART_ELEMENTS
REQ_FACILITY_ADDR1	MEASURE2
REQ_FACILITY_ADDR2	MEASURE2_CHART_ELEMENTS
REQ_FACILITY_CITY	MEASURE3
REQUESTOR_PROJ_NAME	MEASURE3_CHART_ELEMENTS
REQ_FACILITY_STATE	MEASURE4_CHART_ELEMENTS
REQ_FACILITY_ZIP	MEASURE4_CHART_ELEMENT
UNIQUE_CHASE_ID1	MEASURE5
UNIQUE_CHASE_ID2	MEASURE5_CHART_ELEMENT

Upload a XLSX file with Indirect Chase



1. From the **Menu**, select **Upload**.
2. On the **Upload** page, select **Indirect Chase**. If this tab isn't available, make sure you have the **Account Manager** user role (page 44).
3. Use the "top" **Select Files** button to upload the Request Letter PDF. You'll be warned if you try to upload a different file format.
4. Use the "bottom" **Select Files** button to upload the batch information XLSX file.

5. Click **Submit**.

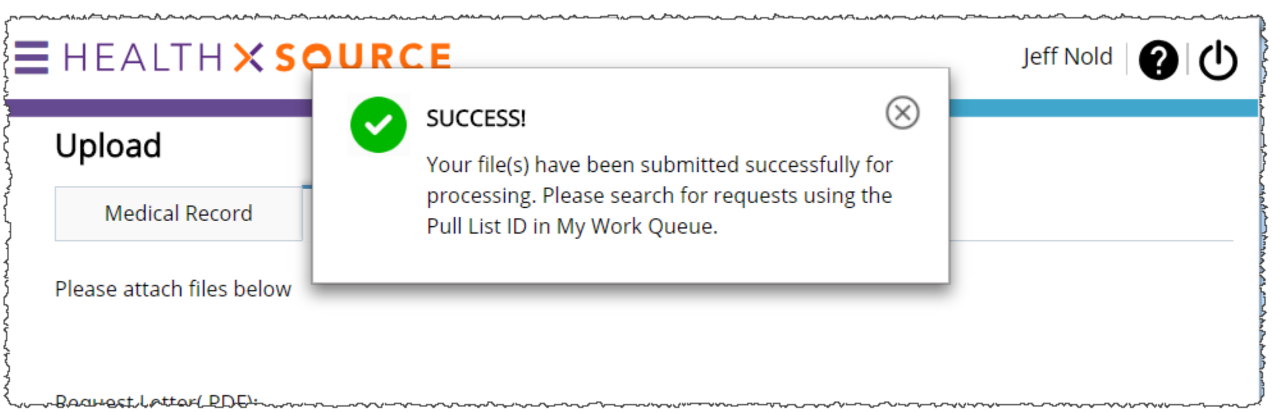


6. The **Indirect Chase** tool validates the XLSX file:

   6.1 **CANNOT** have the same name as a file that has been uploaded before.

   6.2 Must have the correct headers (page 45).

   6.3 Must include at least one row of data.



7. **HealthSource** sends you an appropriate email message, including a link to a modified version of the XLSX file:

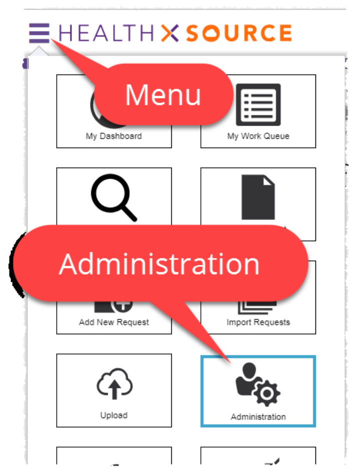
   7.1 **SUCCESS** — The modified XLSX “ends” with a new **eRequest ID** column. Every request created by **Indirect Chase** will have a unique **eRequest ID**.

   7.2 **FAILURE** — The email and XLSX provide troubleshooting guidance.

8. The requests created by **Indirect Chase** will have a **Task Type** of Fulfillment.

ROUTE REQUESTS FOR QUALITY CONTROL

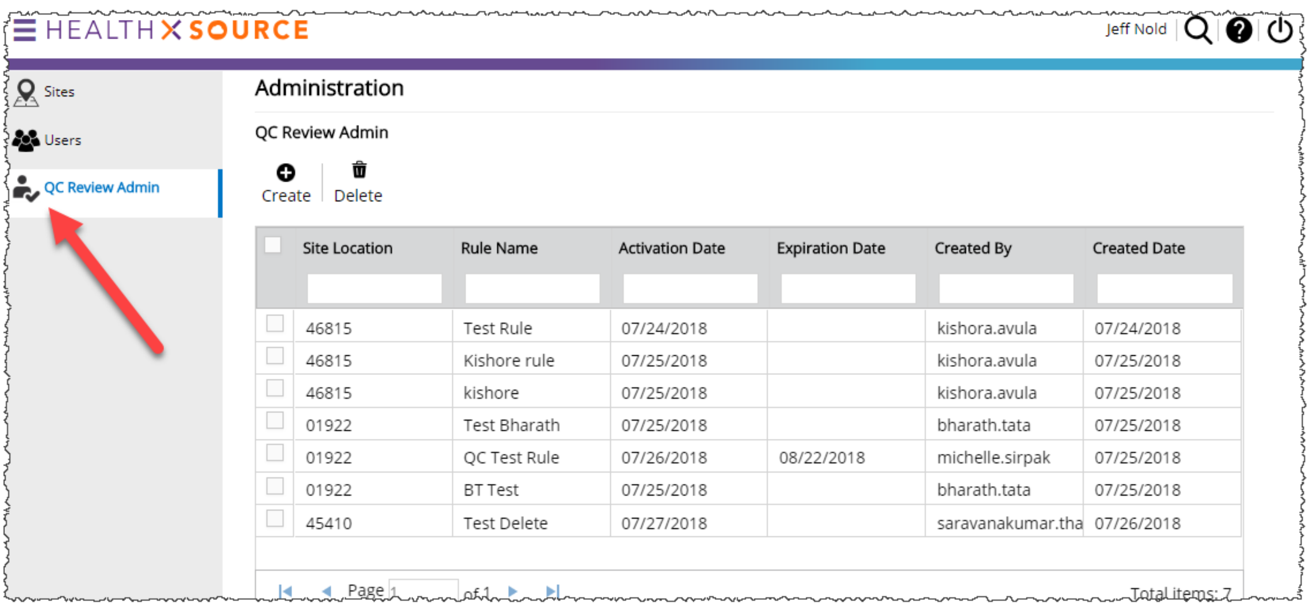
	This feature is available only to a Test Group for v1.0.



Users assigned to the **Group Admin** role can define rules that send requests for Quality Control review. This QC activity takes place in **HealthSource** itself, not at a Ciox Health central office as it does with older ROI applications.

1. From the **Menu**, click **Administration**.

2. On the **Administration** screen, click **QC Review Admin**.

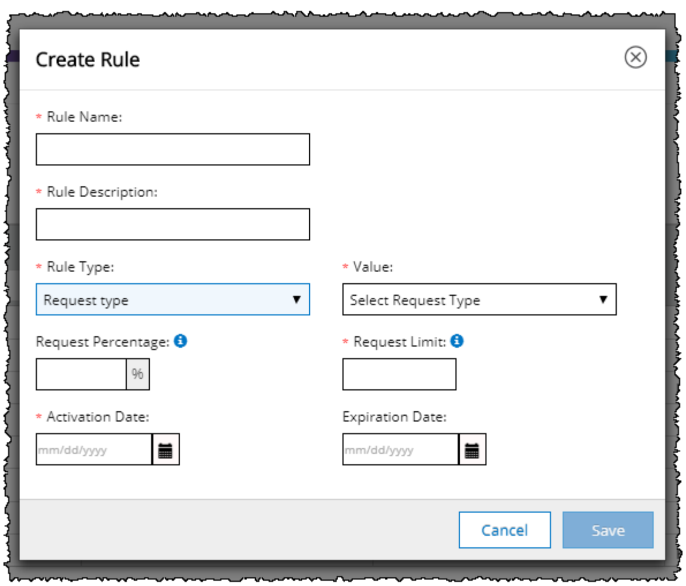


3. The **QC Review Admin** page lists any existing rules.

Create new rule	Click **Create**. See page 50 for rule building instructions.
Edit existing rule	Click the rule. See page 50 for rule building instructions.
Delete rule	Select the checkbox to the left of the rule and click **Delete**.

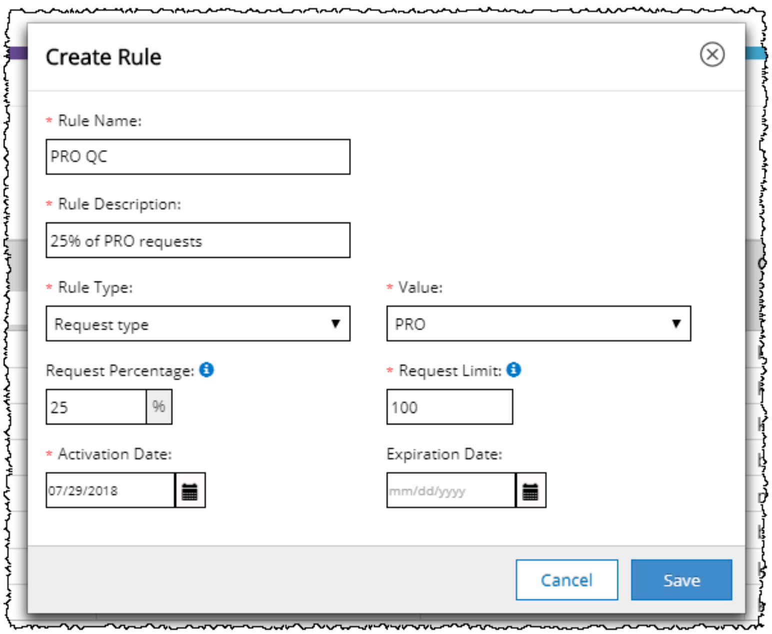
QC rule configuration

Rule Name	Identifies the rule on the **QC Review Admin** page.	
Rule Description	Detailed explanation of the rule's purpose.	
Rule Type	Rules can apply to a Request Type or a Representative (HealthSource user).	
Value	Request Type	Choose the **Invoice Type** from the list. **ALL** requests with this **Invoice Type** will be sent for QC, regardless of the **Site**.
	Representative	Email address used by rep to login to **HealthSource**. **ALL** requests logged by this **Representative** will be sent for QC, regardless of the **Site**.
	Site	Review a percentage of all requests at a site.
Request Percentage	How many requests out of 100 will be sent for Quality Control.	
Request Limit	Maximum # of requests per day that will be sent to Quality Control for this rule.	
Activation Date	We recommend that you start a rule on the next business day if possible.	
Expiration Date	Rule stops working on this date. Leave blank to allow it to work continuously.	



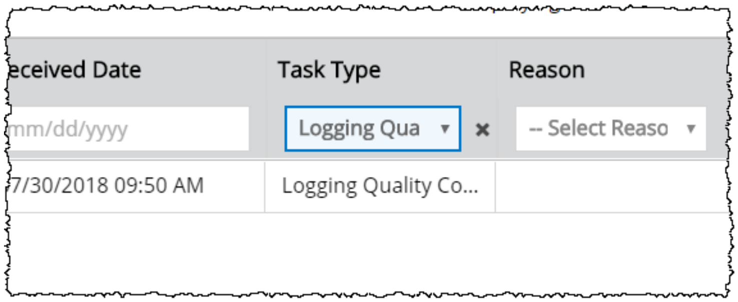
QC Rule example

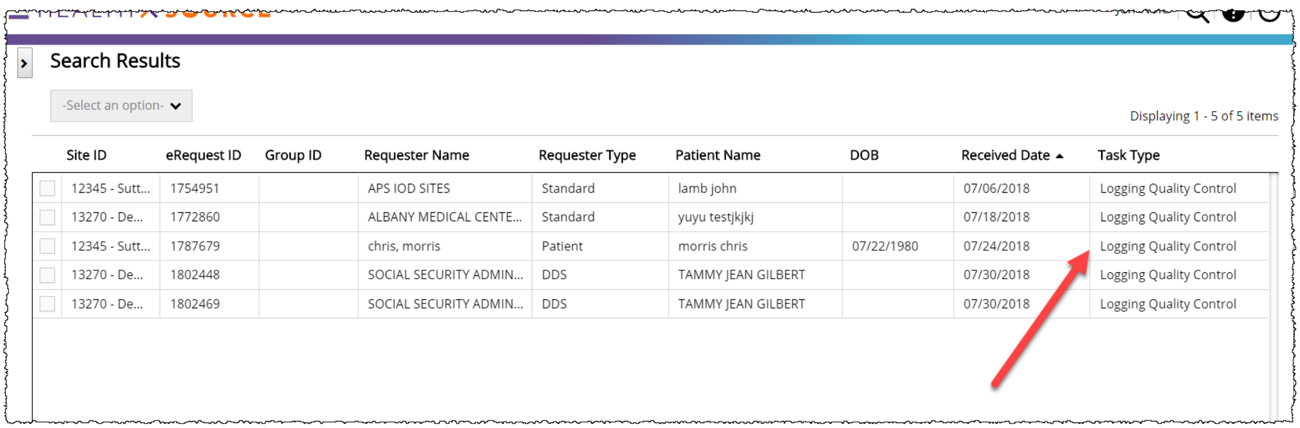
Affected requests	Invoice Type = PRO
% of requests	25%
Maximum # of requests routed to QC per day	100
Starts on	July 29, 2018
Ends on	No expiration



Working on QC requests

Requests “picked” by a QC rule have a **Task Type** of Logging Quality Control.





Site ID	eRequest ID	Group ID	Requester Name	Requester Type	Patient Name	DOB	Received Date	Task Type
12345 - Sutt...	1754951		APS IOD SITES	Standard	lamb john		07/06/2018	Logging Quality Control
13270 - De...	1772860		ALBANY MEDICAL CENTE...	Standard	yuyu testjkjkj		07/18/2018	Logging Quality Control
12345 - Sutt...	1787679		chris, morris	Patient	morris chris	07/22/1980	07/24/2018	Logging Quality Control
13270 - De...	1802448		SOCIAL SECURITY ADMIN...	DDS	TAMMY JEAN GILBERT		07/30/2018	Logging Quality Control
13270 - De...	1802469		SOCIAL SECURITY ADMIN...	DDS	TAMMY JEAN GILBERT		07/30/2018	Logging Quality Control

Future QC enhancements

HealthSource v1.0 offers “simple” QC rules with a single trigger.

In the near future, we’ll provide the ability to configure multiple triggers. For example, you’ll be able to make rules such as:

- Review 25% of **Disability** requests logged by **Representative Veronica Lake**;
- Review 30% of **RAC** requests at **Site 13270**.