



HealthSource v1.1 Release Notes

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HealthSource v1.1 Release Notes

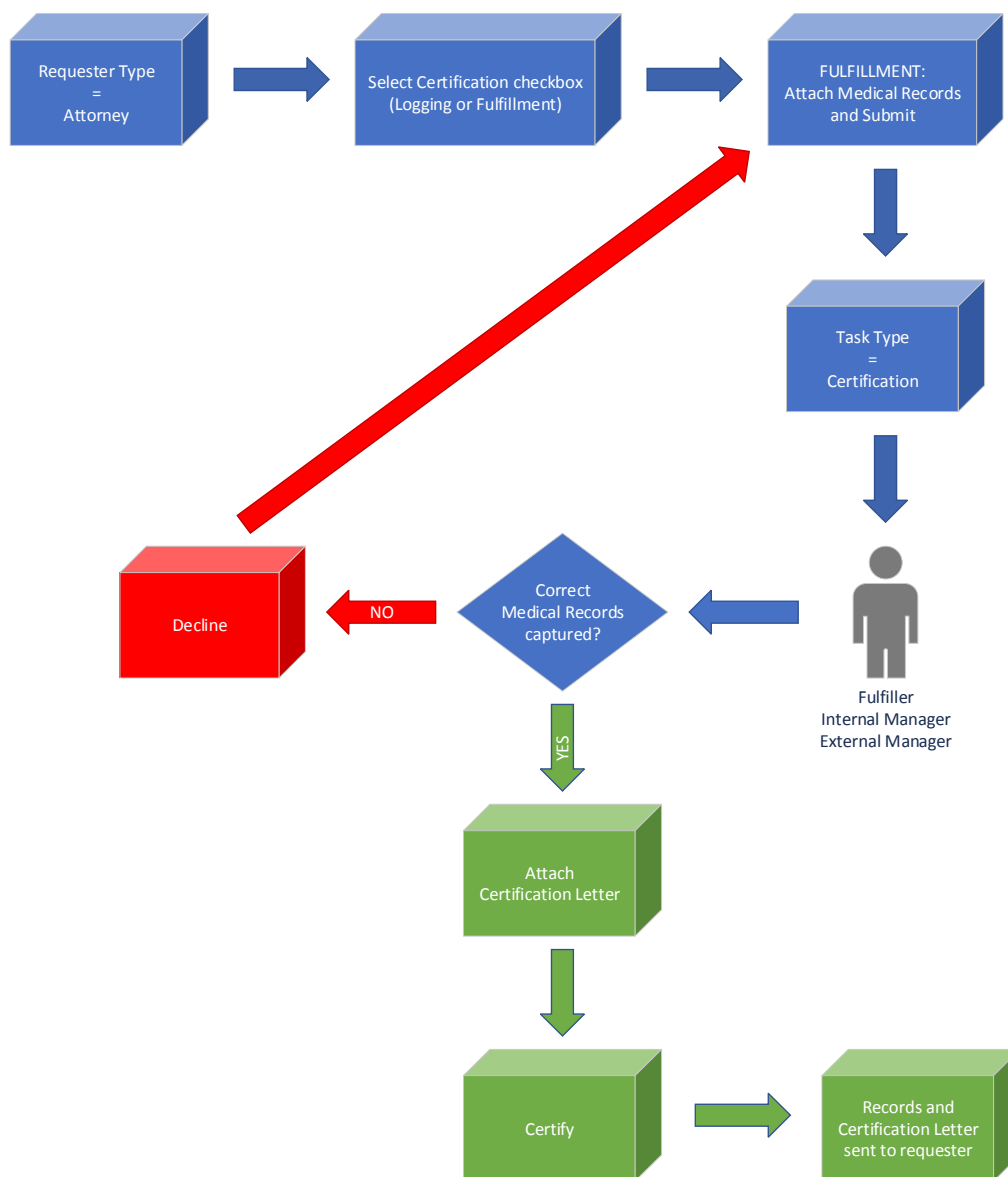
This document describes changes made in **HealthSource v1.1**.

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REQUEST CERTIFICATION

Certification means that a representative of Ciox Health or the health care facility has reviewed the Medical Records attached to a request and verified that those records match the criteria specified in the Request Letter.

The records must be accompanied by a **Certification Letter**, which acts as proof that the records were reviewed and verified.



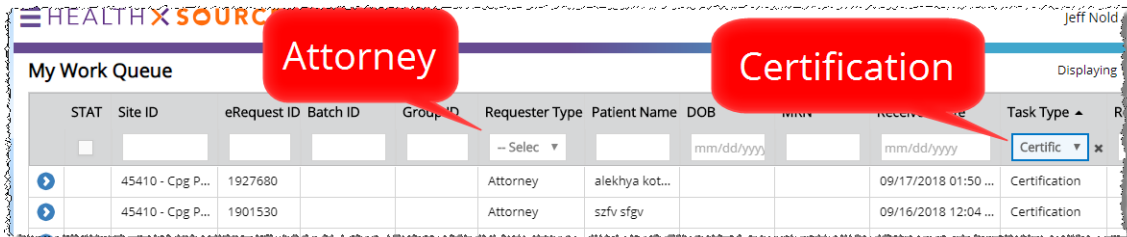
Certification process

1. Open a request for which the **Requester Type** is Attorney.
 - 1.1 **Certification** is not available for other requesters.
 - 1.2 Typically, the need for **Certification** is set during **Logging**, but it can also be selected during **Fulfillment**.
2. Select the **Is Certification required for this request?** checkbox.

The image shows a screenshot of a web form for creating a request. The form contains several fields with red asterisks indicating required information. Two red callout boxes are overlaid on the form: one pointing to the 'Attorney' value in the 'Requester Type' field, and another pointing to the 'Is Certification required for this request?' checkbox. The form fields are as follows:

*Country:	UNITED STATES				
*Requester Name:	JD Law	*Address:	21 MORENO ST	*City:	OCEANSIDE
*State:	CA	*Requester #:	2165978	*Major Class:	Attorney
*Requester Type:	Attorney	Request Letter Date:	09/17/2018	Phone:	
Fax:		*Facility Received Date:	09/17/2018	Request Notification Comments:	
Fax Date:	09/17/2018				
<input type="checkbox"/> Requested Electronic Delivery					
<input checked="" type="checkbox"/> Is Certification required for this request?					

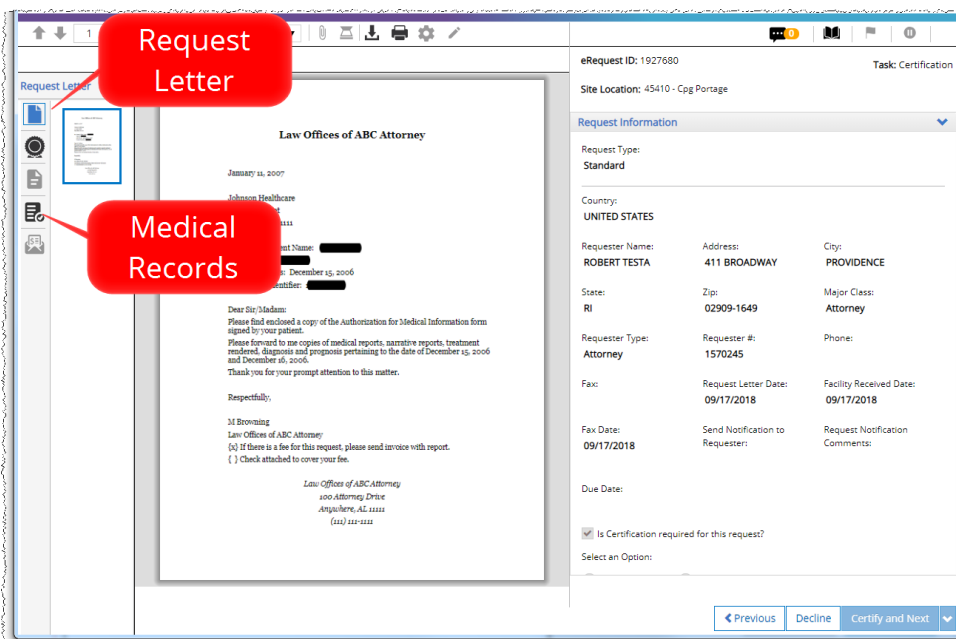
3. After the request has been submitted from **Fulfillment**, its **Task Type** = Certification.



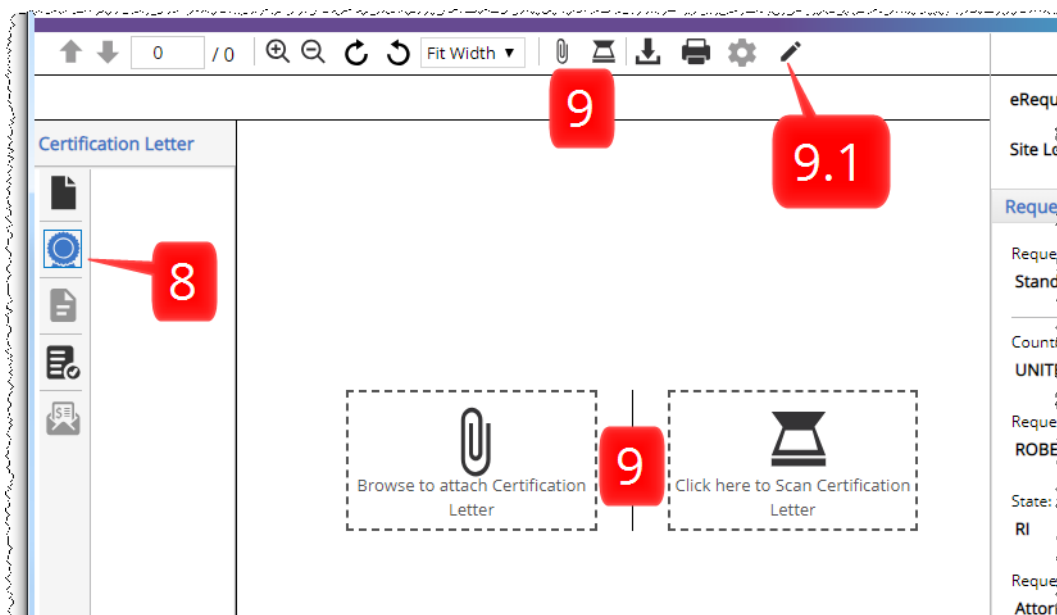
4. Open the request. Only users with these **Roles** (page 26) can **Certify** requests:

- 4.1 **Fulfiller**
- 4.2 **Fulfiller Supervisor**
- 4.3 **Internal Manager**
- 4.4 **External Manager**

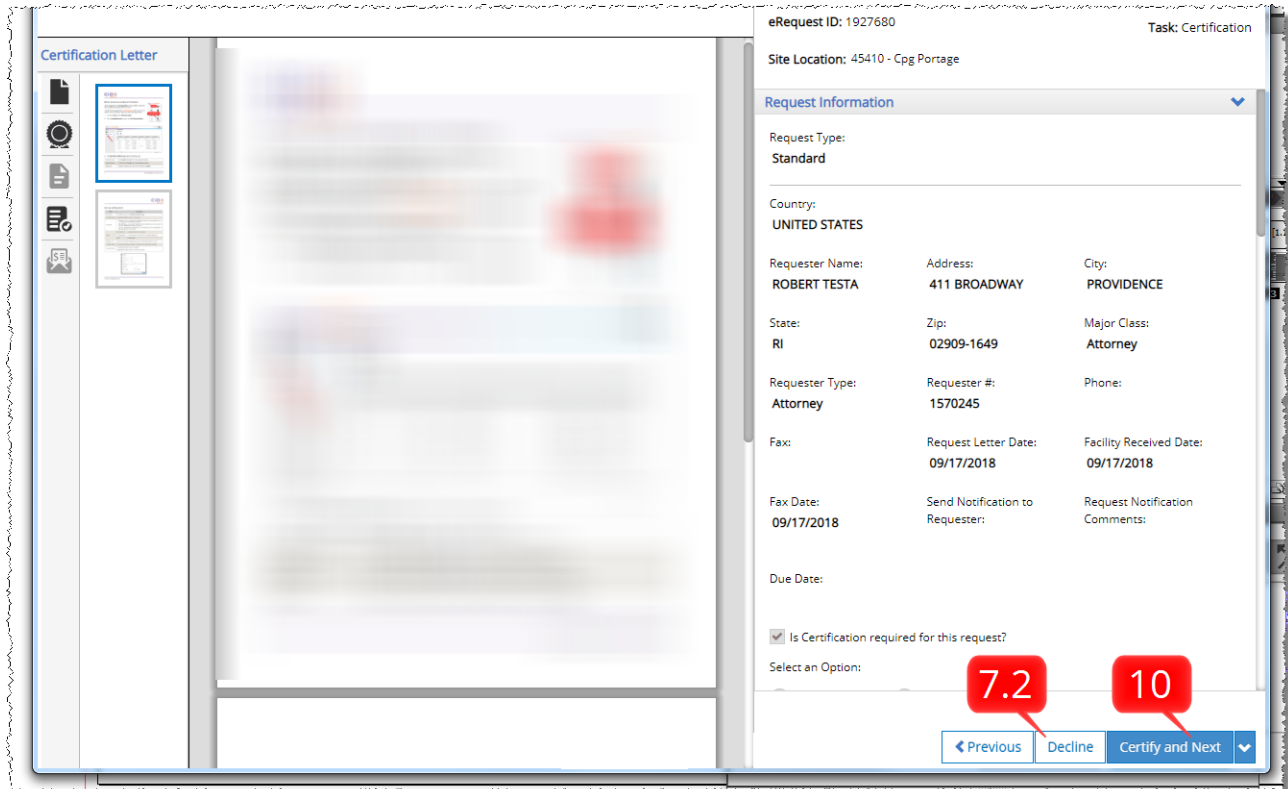
5. The request opens in the **Certification** screen. This screen allows you to see the Request Letter and Medical Records and to attach a **Certification Letter**.



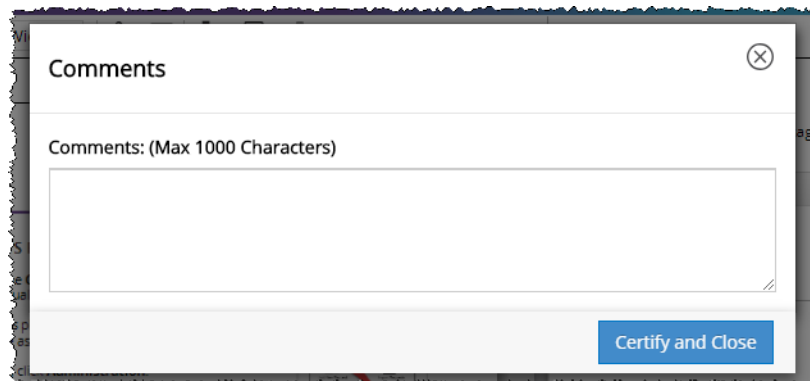
6. Review the Request Letter and Medical Records.
7. Do the captured Medical Records match the requirements stated in the Request Letter?
 - 7.1 **YES** — Proceed to [Step 8](#).
 - 7.2 **NO** — Click the **Decline** command in the bottom right corner of the **Certification** screen. You are prompted to explain your reason in a **Comment**. See [page 9](#) for information on what happens to a declined request.
8. Click the **Certification Letter** symbol.
9. Attach or scan the **Certification Letter**. You can only attach PDF files.
 - 9.1 If needed, use the **Edit** command to delete, add, or rotate pages.



10. Click the **Certify and Next** command at the bottom right of the **Certification** screen.



11. On the **Comments** popup, add any useful information and click the **Certify** button.



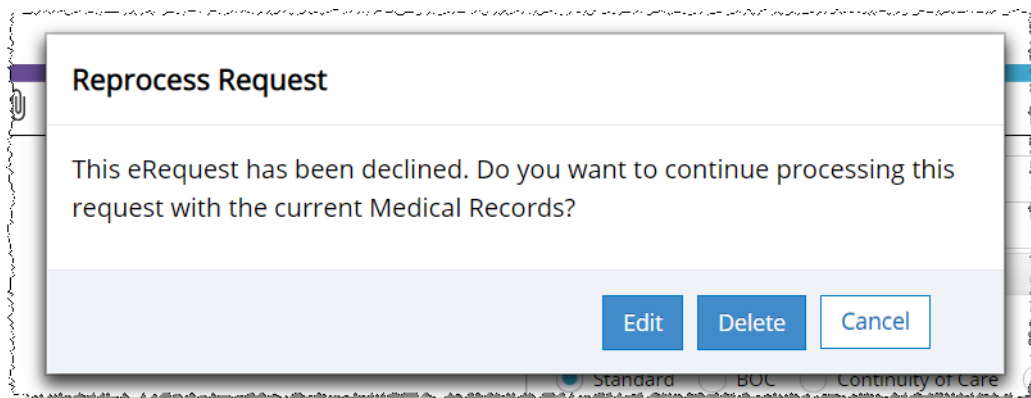
12. **HealthSource** sends the request to Ciox Alpharetta for ROI processing (pricing, indexing, invoicing, and delivery).

What if the Medical Records are wrong for a Certification request?

If the Medical Records for a **Certification** request are declined ([Step 7.2 on page 7](#)), then:

1. The request goes back to **Fulfillment** (Task Type = Fulfillment).
2. The next **Fulfiller** who opens the request is prompted to:

Edit	<p>Opens the request.</p> <p>Retains the Medical Records that have already been attached.</p> <p>You can add more pages and delete existing pages as needed.</p>
Delete	<p>Opens the request.</p> <p>Strips all attached Medical Records from the request.</p>
Cancel	<p>Closes the request.</p> <p>Makes no changes to the attached Medical Records.</p>

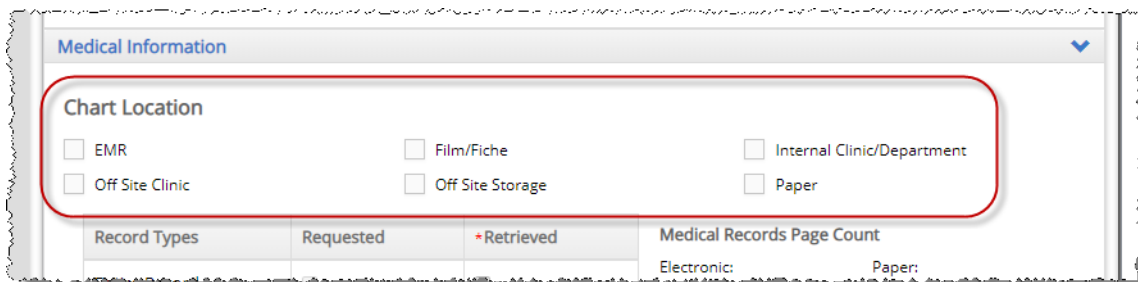


NEW CHART LOCATION FIELDS

The new **Chart Location** fields let **Fulfillers** specify how and/or where the facility stored the Medical Records for a request.

These fields are located in the **Medical Information** section of the **Fulfillment** screen.

They are not displayed during **Logging**.



The screenshot shows a software interface with a 'Medical Information' section. A red rounded rectangle highlights the 'Chart Location' area, which contains six checkboxes: EMR, Off Site Clinic, Film/Fiche, Off Site Storage, Internal Clinic/Department, and Paper. Below this section is a table with columns for 'Record Types', 'Requested', '*Retrieved', and 'Medical Records Page Count'. The 'Page Count' column is further divided into 'Electronic:' and 'Paper:'.

There are six **Chart Location** choices:

- EMR
- Film / Fiche (microfilm / microfiche)
- Internal Clinic / Department
- Off Site Clinic
- Off Site Storage
- Paper

Multiple choices allowed

You can select any number of **Chart Location** choices.

Report

The **Request Details** report includes a **Chart Location** column.

OTHER CAN BE SELECTED AS THE ONLY REQUESTED RECORD TYPE

Loggers can now use **Other Requested Record(s)** as the **ONLY** selection in the **Requested Record Type** section.

Previously, a **Logger** could enter as many **Other** choices as needed, but was also required to select one of the specific **Record Type** checkboxes.

The screenshot shows a form titled "Medical Information" with a dropdown arrow. Below the title is the section "*Select Requested Record Type". There are 15 checkboxes arranged in three columns, all of which are unchecked. A red callout box with the text "No checkboxes selected" points to this list. Below the checkboxes is the label "Other Requested Record(s):" followed by a text input field containing "Medical Questionnaire" and a plus sign icon. A second red callout box with the text "Other = only entry" points to this input field.

Loggers can still:

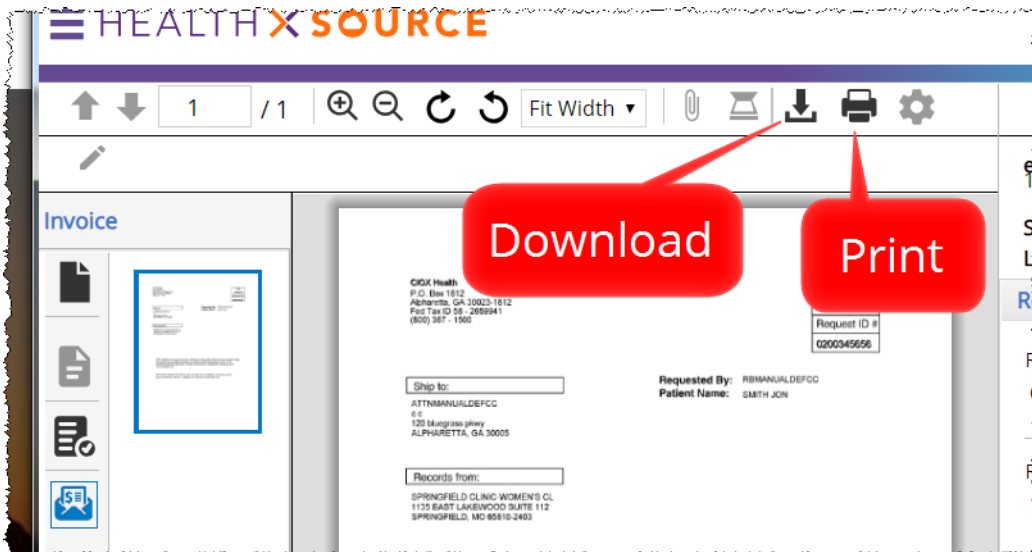
- use a combination of checkboxes and **Other** entries;
- Create multiple **Other** entries.

PRINT AND DOWNLOAD REQUEST FILES FROM REQUEST SEARCH

Fulfillers, Fulfiller Supervisors, and Customer Service users ([page 26](#)) who open a request from the **Request Search** results will now be able to print and / or download all files associated with that request.

Previously, the **Print** and **Download** commands were not available when a request was opened in this “read-only” view.

1. Run a **Request Search**.
2. Select the request from the **Search Results** and choose **View Request**.
3. Open the desired document type.
4. Note that the **Download** and **Print** buttons are available.



MORE INFORMATION IN REQUEST DETAILS SCREEN

The **Request Details** screen, which appears when you select **View Request** from the **Request Search** results, now provides more data:

Area / Site Information

Area/Site Information		Associate/Member Information	
Facility Type:	Clinic	Associate/Member Name:	Srini Chamala
Site Number:	01922	RMO Name:	Rmo Closed (124725)
Site Status:	Active	RDO Name:	Unassigned Rdo (124720)
Partner Site:		VPO Name:	Tandra Stephens (677778)
Site:	Springfield Clinic, Womens Cl (01922) 1135 East Lakewood Suite 112 Springfield, MO 65810-2403	SVPO Name:	Tandra Stephens (677778)

Request Information

Request Information			
Invoice Number:	20038363	Invoice Type:	Patient Directives (106)
eRequest ID:	1720704	Invoice Template:	Quickview Non-Billable (QVNB)
Request Type:	Standard	Facility Received Date:	06/01/2018
Requester:	Richard D Crites Atty At Law (2054060)	Logged Date:	
Job Type:	Nonbillable Project (NB)	Fulfilled Date:	06/18/2018
Delivery Date:		Billing Status:	N
Paper Page Count:	0	Requested By:	James
Micro Page Count:	0	Attention To:	1234
Electronic Page Count:	10	BOC Indicator:	N
Electronic Delivery:	N	Claim Number:	
Requested:		Case Number:	
		Date(s) Of Service:	12/12/2012 - 12/12/2012

Requester Information

Requester Information	
Pre-bill Fee Status:	Delivery Method: Mail
Special Pricing Information:	Restricted: Group ID:

Billing / Shipping Address Information

Billing Address Information		Shipping Address Information	
Name:	Richard D Crites Atty At Law	Name:	Richard D Crites Atty At Law
Attr:	1234	Attr:	1234
Address 1:	1736 E SUNSHINE ST	Address 1:	1736 E SUNSHINE ST
Address 2:	STE 219	Address 2:	STE 219
Address 3:		Address 3:	
Address 4:		Address 4:	
City:	Springfield	City:	Springfield
State:	MO	State:	MO
Zip:	65804-1328	Zip:	65804-1328
Country:	US	Country:	US

Patient Information

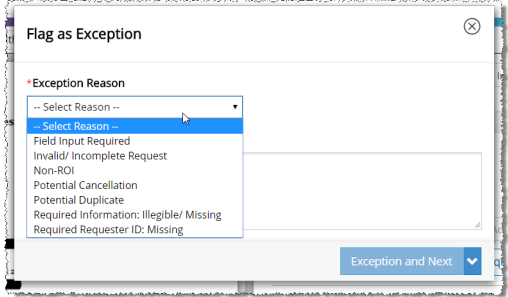
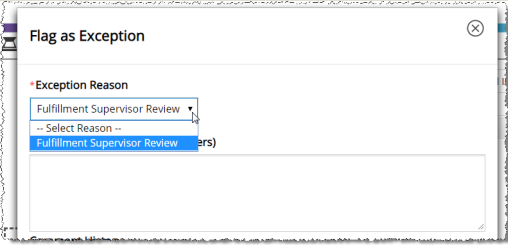
Patient Information			
Last Name:	Chamala	First Name:	Srini
DOB:	03/25/1945	Gender:	
MRN:		SSN:	
MBI:			

Financial Information

Financial Information			
Payment Information			
Check Received:	No	Check Amount:	
Check Number:		Check Payment Type:	
Check Date:			
Invoice Pricing Information			
Item	Quantity	Unit Cost	Total Cost
Basic Fee	0	\$0.00	\$21.33
Retrieval Fee	0	\$0.00	\$0.00
Per Page Copy (Paper) 1	5	\$1.44	\$7.20
Shipping	0	\$0.00	\$0.00
Subtotal	0	\$0.00	\$28.53
Sales Tax	0	\$0.00	\$0.00
Invoice Total	0	\$0.00	\$28.53
Balance Due	0	\$0.00	\$28.53

EXCEPTION CHANGES

Loggers and **Fulfillers** can now choose from these **Exception Reasons** when flagging a request as an **Exception**:

Role	New Exception Reasons	Example
<p>Logger</p>	<ul style="list-style-type: none"> Field Input Required Invalid / Incomplete Request Non-ROI Potential Cancellation Potential Duplicate Required Information: Illegible / Missing Required Requester ID: Missing 	
<p>Fulfiller</p>	<ul style="list-style-type: none"> Escalation * Fulfillment Supervisor Review 	

* if the **Escalation** preference ([page 4](#)) is enabled for the Site to which the request is assigned.

Old Exception Reasons mapped to new choices

Requests that used an **Exception Reason** which is no longer available as of **v1.1** will automatically be updated:

Role	Old Reason	Mapped to new reason
Logger	<ul style="list-style-type: none"> • Authorization: Missing / Incomplete • Pages Missing • Other 	Invalid / Incomplete Request
Fulfiller	<ul style="list-style-type: none"> • Other • Potential Duplicate • Supervisor Review • Unknown Site 	Fulfillment Supervisor Review

CORRESPONDENCE CHANGES

HealthSource v1.1 includes substantial changes to the **Correspondence** feature:

- Read-only Correspondence preference
- New Correspondence Reasons
- Correspondence content updated for better compliance

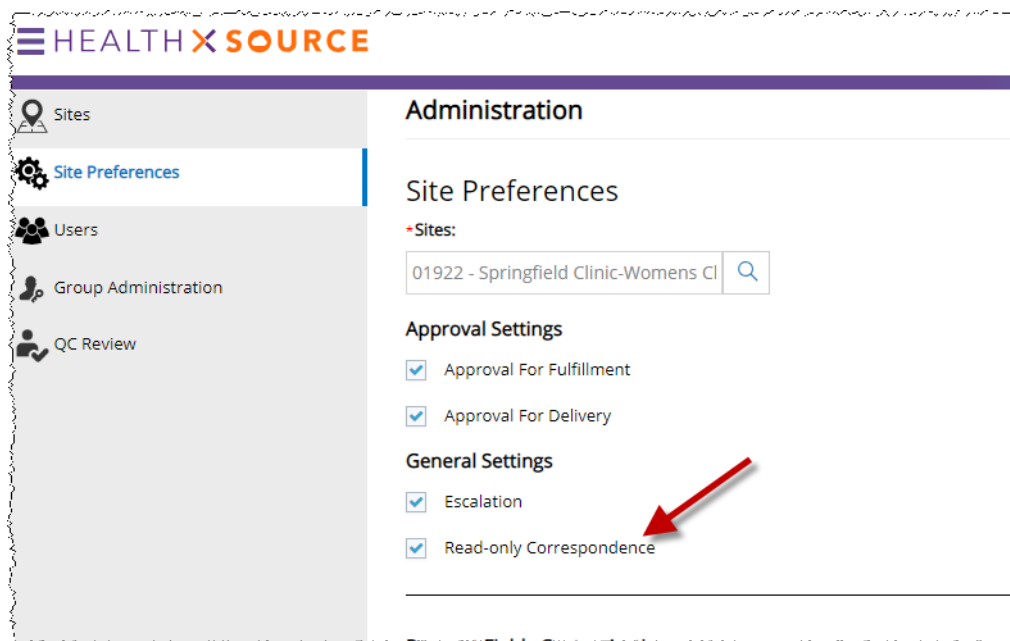
Read-only Correspondence preference



Site Preferences should **ONLY** be used for Sites in our Pilot program.
If your Site is not part of the Pilot, do **NOT** enable any **Preferences**.

If the **Read-only Correspondence** preference (page 4) is enabled for a Site:

- Users **CANNOT** edit the text of the **Correspondence**. Only the default text of the selected **Reason(s)** will be printed on the letter sent to the requester.
- **Other** is not available as a **Reason** for sending the **Correspondence**. There is no default text associated with **Other**, so it serves no purpose at sites that use the read-only option.



New Correspondence Reasons

v1.1 adds many new **Reason(s)** to the **Create Correspondence** screen. These reasons vary by the status of the request. The following table shows all available **Reason(s)**, not only the new choices:

Available Correspondence Reasons	Logging	Fulfillment
Authorization Missing	Yes	No
Authorization Sensitive Information Partial Records	No	Yes
Authorization missing TPO statement	Yes	No
Certification of Previously Released Records	Yes	No
Deceased Patient	No	Yes
Description of Disclosure Missing	Yes	No
Electronic Signature	Yes	No
Executor's Letter Naming Executor Missing	Yes	No
Faxed Request	Yes	No
Forms Completion	Yes	No
Health Care Power of Attorney Missing	Yes	No
Invalid Subpoena	Yes	Yes
Missing Hospital Name	Yes	No
Need More Information to Identify Patient	No	Yes
No Dates of Treatment as Requested	Yes	Yes
Notice of Delay: Incomplete Chart	No	Yes
Notice of Delay: Temporarily Unable to Locate Records	No	Yes
Out-Patient Records Only	No	Yes

Available Correspondence Reasons	Logging	Fulfillment
Out-of-State Subpoena	No	Yes
Patient Electronic Delivery Access Code	No	Yes
Patient Not Found	Yes	Yes
Person Authorized to Make Disclosure Missing	Yes	No
Poor Image Quality	No	Yes
Records Purged	No	Yes
Redislosure by Recipient Missing	Yes	No
Refusal Initiated	Yes	Yes
Request Expiration Date Missing	Yes	Yes
Requested documents not permitted to be released per facility policy	Yes	Yes
Right to Revoke Missing	Yes	No
Signature Discrepancy	Yes	No
State Required Notice of Delay Letter	Yes	No
Statement of Assurance	Yes	No
Written Consent Required (To Patient) Missing	Yes	No
Other *	Yes	Yes

* not available if the **Read-only Correspondence** preference ([page 17](#)) is enabled.

Correspondence content updated for better compliance

The Ciox Health Compliance team has updated the default text associated with all of the **Reason(s)** for **Correspondence** sent from both **Logging** and **Fulfillment**.

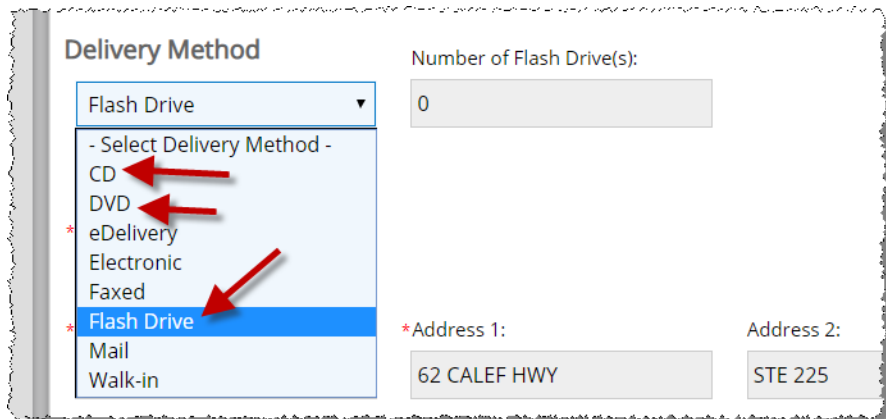
PASSWORD PROTECTION FOR DOWNLOADED REQUEST FILES

HealthSource now allows you to save request documents as a password-protected PDF which can be copied to a CD, DVD, or Flash Drive.

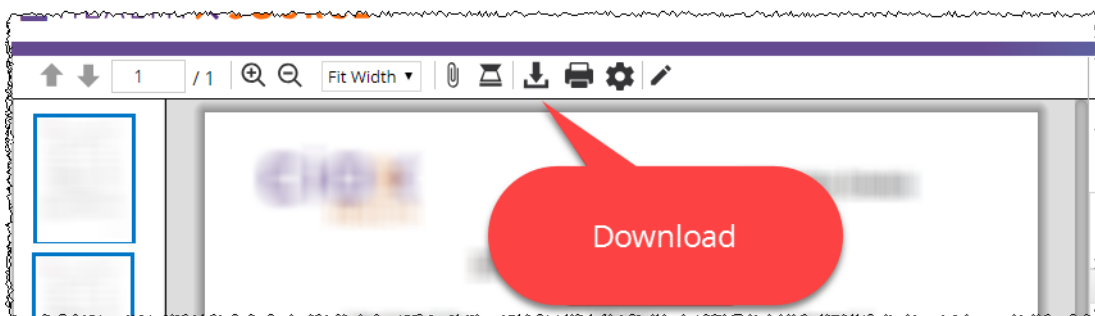
1. Open a request for **Fulfillment**
2. Add the Medical Record pages.
3. Set the **Delivery Method** to one of these options:

- 3.1 CD
- 3.2 DVD
- 3.3 Flash Drive

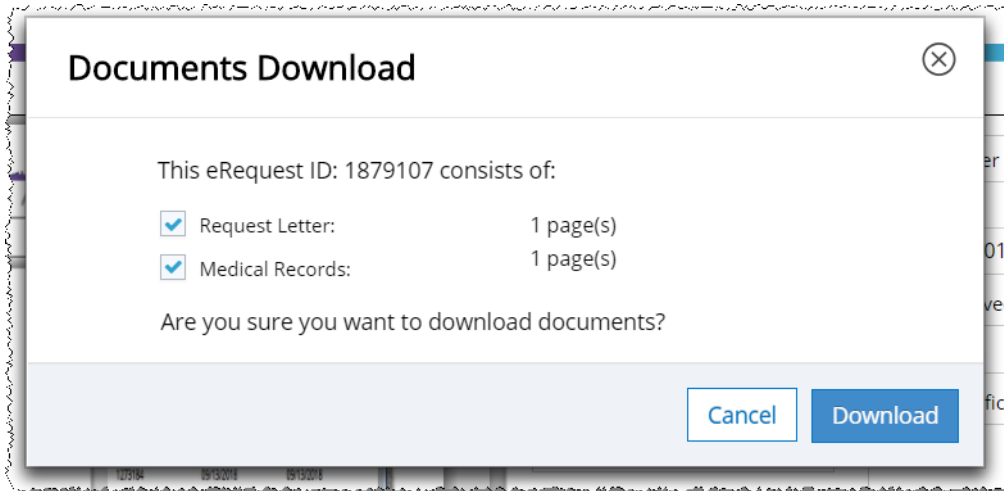
4. Fill out any required fields, such as the **Retrieved** checkbox.
5. Click the **Download Artifacts** button.



The screenshot shows a 'Delivery Method' dropdown menu with the following options: Flash Drive (selected), - Select Delivery Method -, CD, DVD, *eDelivery, Electronic, Faxed, *Flash Drive, Mail, and Walk-in. Red arrows point to the CD, DVD, and *Flash Drive options. To the right, there is a 'Number of Flash Drive(s):' input field with the value '0'. Below the dropdown, there are two address fields: '*Address 1:' with the value '62 CALEF HWY' and 'Address 2:' with the value 'STE 225'.

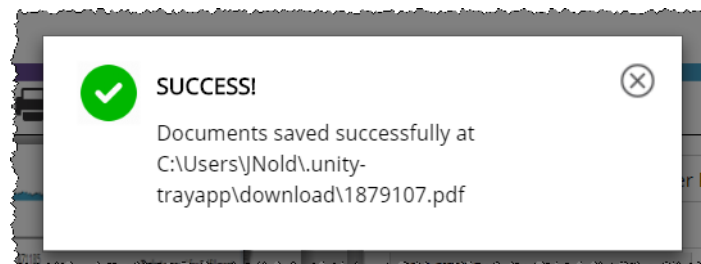


6. On the **Documents Download** window, select the documents to save to your local computer. You should always include the Request Letter and the Medical Records.



7. **HealthSource** saves the specified documents as a single password-protected PDF file to this folder:

C:\Users\



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

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

The screenshot shows a web form titled "Medical Information". Under the "Chart Location" section, there are several checkboxes: EMR, Off Site Clinic, Film/Fiche, Off Site Storage, Internal Clinic/Department, and Paper. Below this is a table of Record Types with columns for "Requested" and "*Retrieved". The "Consultation" row has a checked box in the "Requested" column. A red callout bubble with the text "Must = 0" points to the "Medical Records Page Count" section, which contains four input fields: "Electronic:", "Paper:", "Microfilm:", and "Total Pages:". All four fields contain the number "0".

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

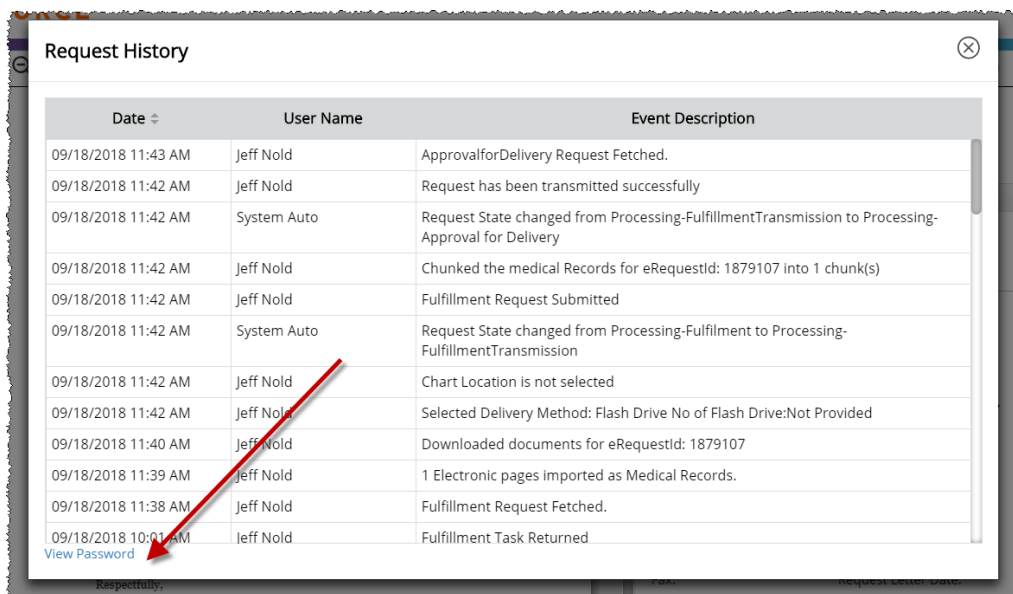
The screenshot shows a section of the form titled "*Select an Option:". There are two radio buttons: "Invoice Type" (selected) and "Reason for Request". Below this is a dropdown menu showing "01 SUBPOENA". Under the "Delivery Method" section, there is a dropdown menu showing "CD" and a text input field labeled "Number of CD(s):" containing the value "2". A red arrow points to the "2" in the input field. Below this is the "Bill To" section with a "*Country:" label.

11. Open the **Request History**.

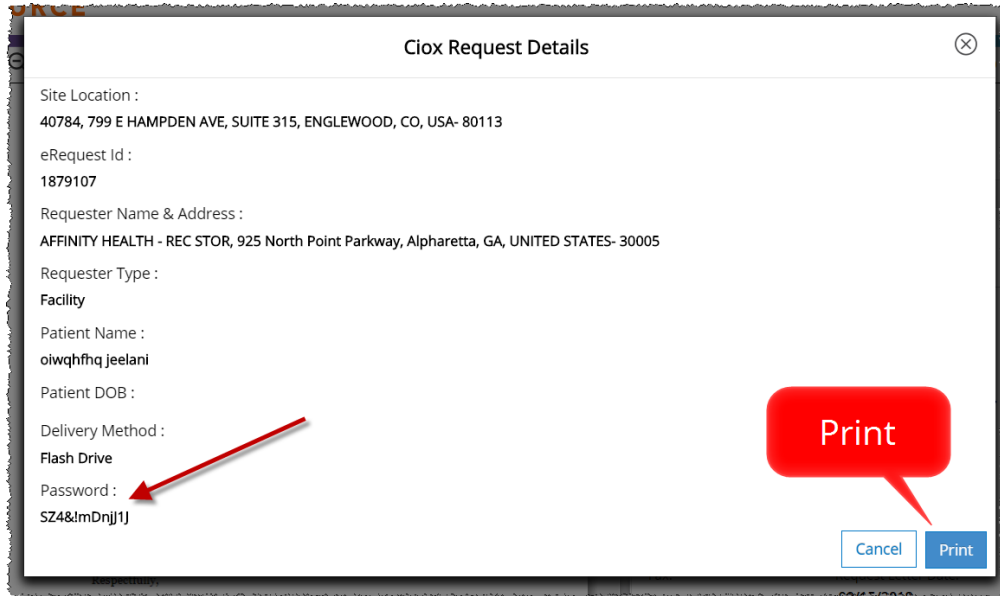


It's easiest to do this while the request is still open and hasn't been submitted, but you can also use the **Request Search** tool to open the **Request History** later

12. At the bottom left corner of the **Request History** window, click **View Password**.



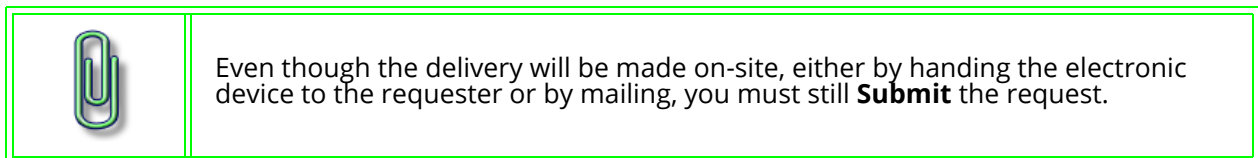
13. The **Request Details** window appears. The **Password** is displayed at the bottom of this window.



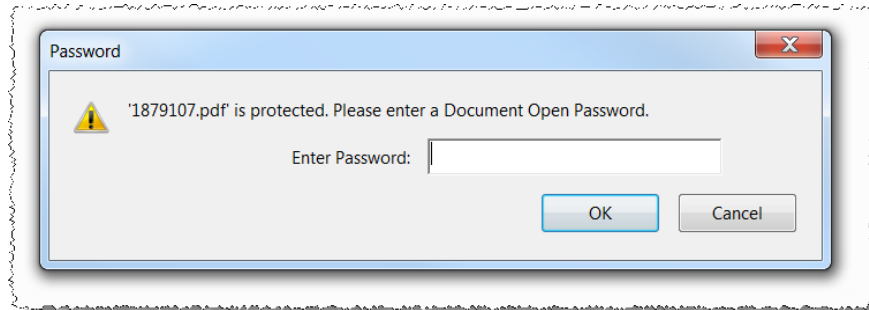
14. Provide the **Password** to the requester, verbally or by using the **Print** button on the **Request Details** screen.



15. **Submit** the request.



16. The requester must enter the **Password** to open the PDF:



USER MANAGEMENT

The new **Group Administration** tool assigns **Roles** to **HealthSource** users at specific Sites.

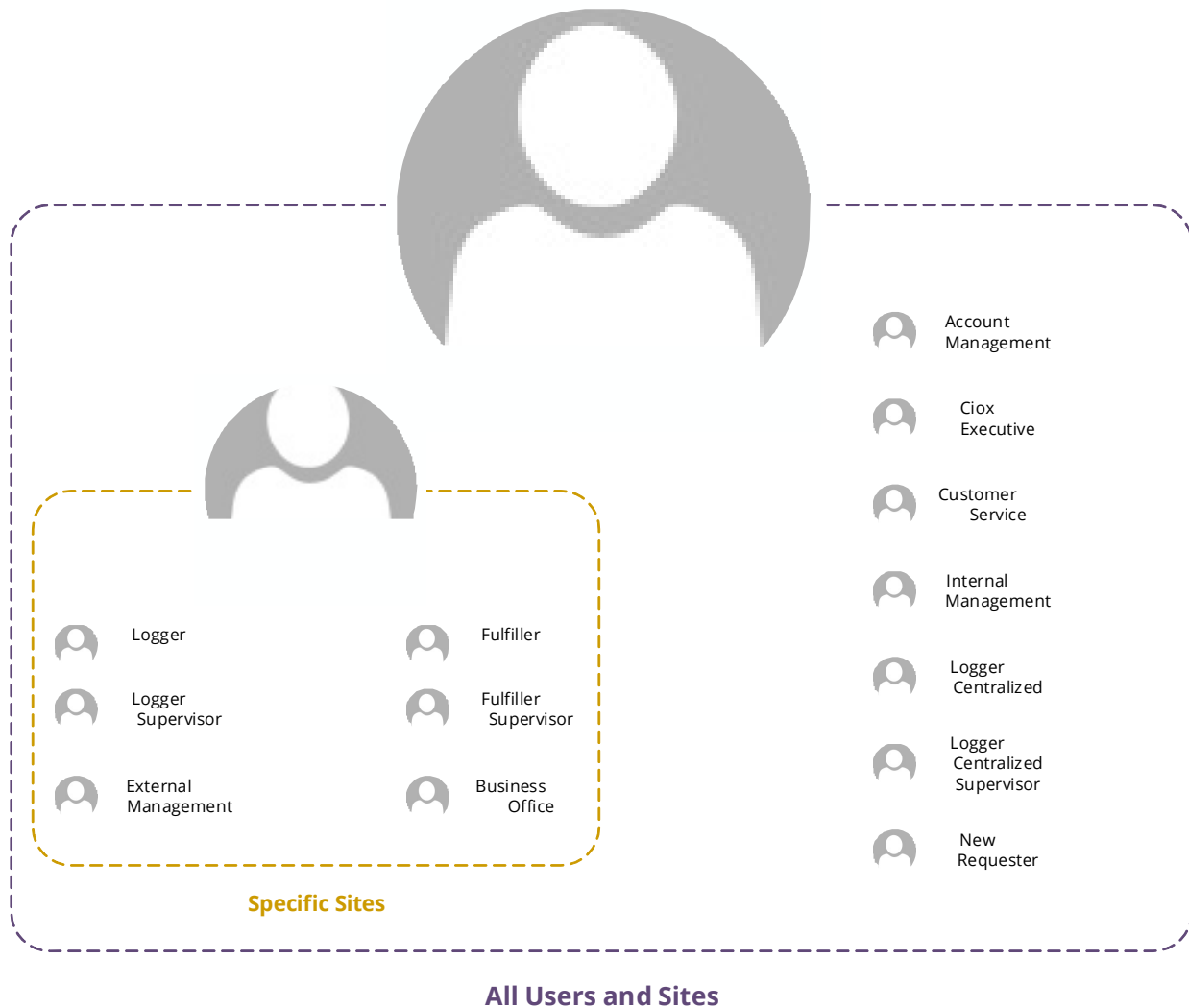
See these topics for detailed information:

- [Group Administration compared to Platform Administration](#)
- [User Roles and Permissions](#)
- [User roles not available to Group Administrators](#)
- [Permission descriptions](#)
- [User Roles and access to request documents](#)
- [Assign Roles and Sites to users](#)

Group Administration compared to Platform Administration

The responsibility for User Management in HealthSource is split between two types of administrators:

Group Administrator	Assign "field" Roles to users at a specific group of Sites. Typically be a Regional Manager of Operations or someone with similar responsibilities
Platform Administrator	Same rights as Group Administrators, but can also assign "broad" Roles that apply to most or all of the HealthSource system.



User Roles and Permissions

See [page 30](#) for a description of what the permissions allow a user to do.

Permissions	Logger	Fulfiller Supervisor	Fulfiller	Logger Supervisor	External Management	Business Office
Open requests with Task Type:						
• Logging	Y			Y	Y	
• Logging On Hold	Y			Y		
• Logging Exception				Y	Y	
• Logging QC	Y			Y		
• Fulfillment		Y	Y		Y	
• Fulfillment On Hold		Y	Y			
• Fulfillment Exception		Y	Y		Y	
• Fulfillment QC		Y	Y			
Approve for Fulfillment / Delivery		Y	Y		Y	
Certify request		Y	Y		Y	
Send request to New Requester team	Y	Y	Y	Y	Y	
Split request	Y			Y		
Run reports	Y	Y	Y	Y	Y	
Run Request Search	Y	Y	Y	Y	Y	Y
View Request Subway		Y		Y	Y	
View My Dashboard	Y	Y	Y	Y	Y	
Add new request	Y			Y	Y	
Enter STAT requests	Y	Y	Y	Y	Y	
Upload						
• Medical Records		Y	Y		Y	
• Request Letters	Y	Y	Y	Y	Y	

User roles not available to Group Administrators

The following **Roles** are assigned by Ciox Health implementation and operations experts through the **Platform Administration** tool. They cannot be assigned by **Group Administrators**:

- Account Manager
- Ciox Executive
- Customer Service
- Group Administrator
- Internal Management
- Logger Centralized
- Logger Centralized Supervisor
- New Requester

These roles can impact a large number of Sites and/or enjoy “special” privileges that could interfere with the overall efficiency of **HealthSource** if used improperly.

Permission descriptions

Role	Function
Open requests with Task Type	Open and work on requests with the specified Task Type .
Approve for Fulfillment / Delivery	Approve requests before Medical Records are captured / delivered. See page 43 for details on the Approval process, which is available only for Sites in our Pilot program.
Certify requests See page 4 for details.	<ul style="list-style-type: none"> • Open requests with a Task Type of <u>Certification</u>. • Attach Certification document, if appropriate. • Approve or Decline the Medical Records for delivery.
Send request to New Requester team	The Create New Requester command is available from the Logging and / or Fulfillment screen. Used when the request cannot be linked to an existing customer.
Split requests	Use the Split command to divide a multiple page Request Letter into separate individual requests.
Run reports	Access the Dashboard Reports tool from the Menu .
Run Request Search	Use the Request Search tool. Some options for handling requests returned by a search, such as approval for fulfillment and cancel, are limited by other permissions.
Subway	See the Request Subway view of request activity.
View My Dashboard	See My Dashboard , which includes a list of requests placed on hold by the user (My Holds) and user-level productivity measurements (My Statistics).
Add New Request	Manually create a new request using the Add New Request command in the Menu .
Add STAT Request	Capture the number of STAT requests using the STAT Request command in the Menu . Typically, this command is used to track requests for patient information received from providers and delivered in a short time via fax. These requests are not logged and fulfilled.
Upload	Access the specified tab on the Upload page, opened from the Menu .

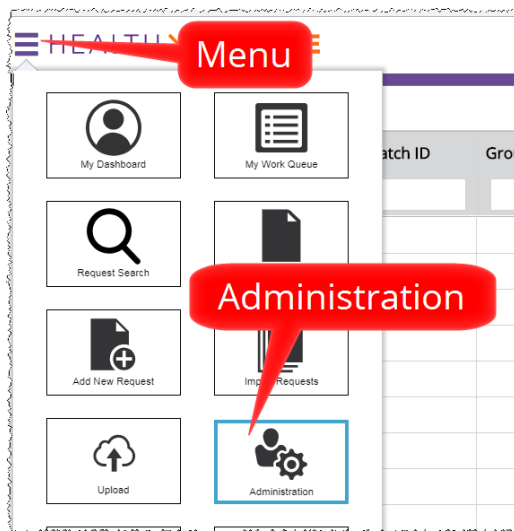
User Roles and access to request documents

When viewing a request from the **Request Search** tool, the documents that a user can see are limited by **Role**:

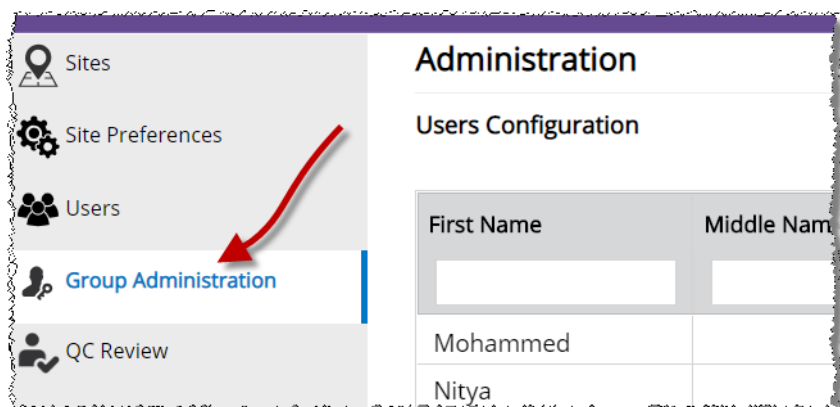
Role	Request Letter	Medical Records	Certification Letter	Correspondence	Invoice
Account Manager	Y	Y		Y	Y
Business Office	Y	Y	Y	Y	Y
Ciox Executive	Y	Y	Y	Y	Y
Customer Service	Y	Y	Y	Y	Y
External Management	Y	Y	Y	Y	Y
Fulfiller	Y	Y	Y	Y	Y
Fulfiller Supervisor	Y	Y	Y	Y	Y
Group Administrator	Y	Y	Y	Y	Y
Internal Management	Y	Y	Y	Y	Y
Logger	Y			Y	Y
Logger Centralized	Y			Y	Y
Logger Supervisor	Y			Y	Y
Logger Supervisor Centralized	Y			Y	Y
New Requester	Y				

Assign Roles and Sites to users

1. Log into **HealthSource** as a **Group Administrator**. You must be assigned to this role in order to configure the **Roles** for other users.
2. From the **Menu**, select **Administration**.



3. On the **Administration** screen, click **Group Administration**.



- The **User Configuration** table lists all users currently assigned to the Site(s) for which you are responsible. You can sort and filter this list.

Administration

Users Configuration

First Name	Middle Name	Last Name	Job Title	Email	Permissions
Albert		Arokiayasouridass		albert.arokiyasourida...	Fulfiller, Fulfiller Superv...
Alekhya		Kothapally		Alekhya.Kothapally@ci...	Fulfiller
Business		Office		business.office@gmail...	Business Office
Gym	Instructor	Student		InstructorStudent@gy...	Instructor, Logger, Log...
Health		Source21		health.source21@ciох...	Fulfiller
Internal		Management		internal.management...	Internal Management
Logger		LO		logger@gmail.com	Logger
Nitya		Pampari		Nitya.Pampari@ciохhe...	Fulfiller, Logger
Peter		Kang		peter.kang@ggggg.com	Fulfiller, Fulfiller Superv...
Qa		Instructor		Qa.Instructor@gym.com	Instructor
Qa		InstructorStudent		Qa.InstructorStudent@...	Instructor, Student
Qa		Student		Qa.Student@gym.com	Student

Page 1 of 2 Total items: 17

- Click the user's First Name to open the **User Configuration** screen.

Administration

Users Configuration

First Name	Middle Name	Last Name	Job Title	Email	Permissions
Albert		Arokiyasouridass		albert.arokiyasourida...	Fulfiller, Fu
Alekhya		Kothapally		Alekhya.Kothapally@ci...	Fulfiller
Business		Office		business.office@gmail...	Business C
Gym	In	Student		InstructorStudent@gy...	Instructor,
Health		Source21		health.source21@ciох...	Fulfiller...

Click to configure user

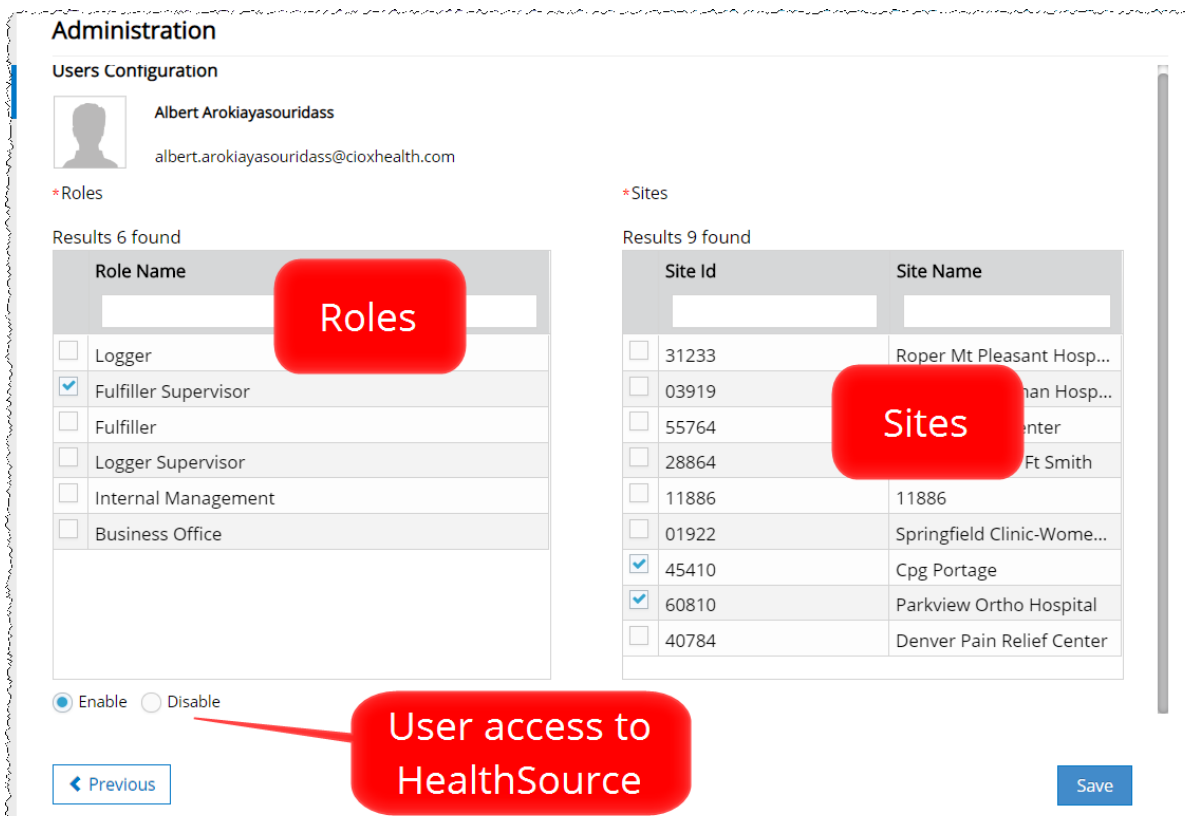
6. Specify the appropriate **Roles** and **Sites** on the **User Configuration** screen.
 - 6.1 See [page 28](#) for a description of the available **Roles**.
 - 6.2 The **Sites** table lists all facilities to which the user has been assigned. You cannot add new **Sites** to this list.



You cannot assign different **Roles** to the same user at different **Sites**.


For example, you cannot make Jane Doe a Logger at Site 13270 and a Fulfiller at Site 98765. She will have the same **Roles** at every **Site** to which she's assigned.

7. The **Enable** and **Disable** buttons allow or prevent the user from accessing **HealthSource**. Choosing **Disable** immediately clears any **Role** and **Site** selections.
8. Click **Save** when done. To leave the user un-changed, click **Previous**.



Administration

Users Configuration

 **Albert Arokiyasouridass**
albert.arokiyasouridass@ciouxhealth.com

***Roles**

Results 6 found

Role Name
<input type="checkbox"/> Logger
<input checked="" type="checkbox"/> Fulfiller Supervisor
<input type="checkbox"/> Fulfiller
<input type="checkbox"/> Logger Supervisor
<input type="checkbox"/> Internal Management
<input type="checkbox"/> Business Office

***Sites**

Results 9 found

Site Id	Site Name
<input type="checkbox"/> 31233	Roper Mt Pleasant Hosp...
<input type="checkbox"/> 03919	Man Hosp...
<input type="checkbox"/> 55764	Center
<input type="checkbox"/> 28864	Ft Smith
<input type="checkbox"/> 11886	11886
<input type="checkbox"/> 01922	Springfield Clinic-Wome...
<input checked="" type="checkbox"/> 45410	Cpg Portage
<input checked="" type="checkbox"/> 60810	Parkview Ortho Hospital
<input type="checkbox"/> 40784	Denver Pain Relief Center

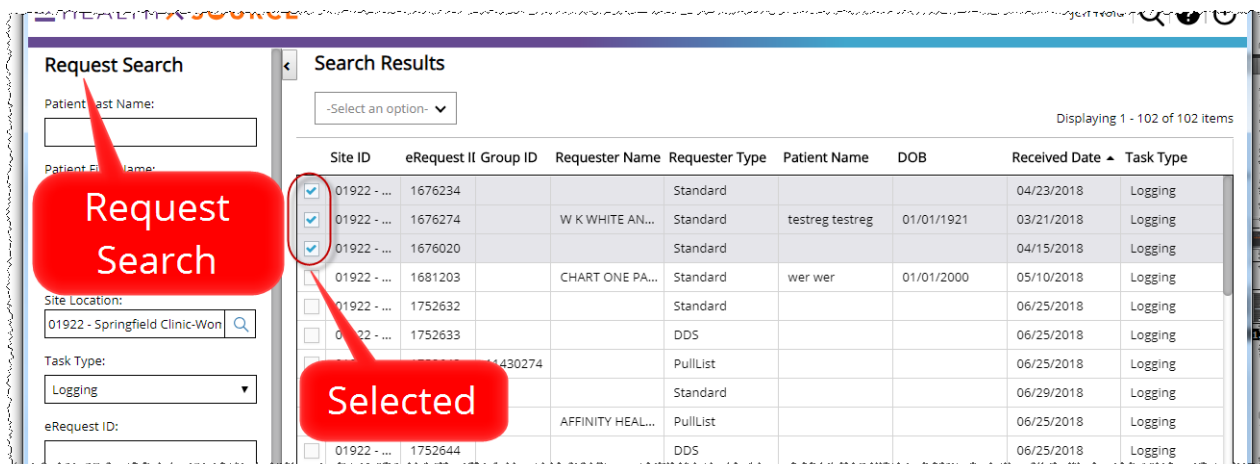
Enable Disable

[← Previous](#) [Save](#)

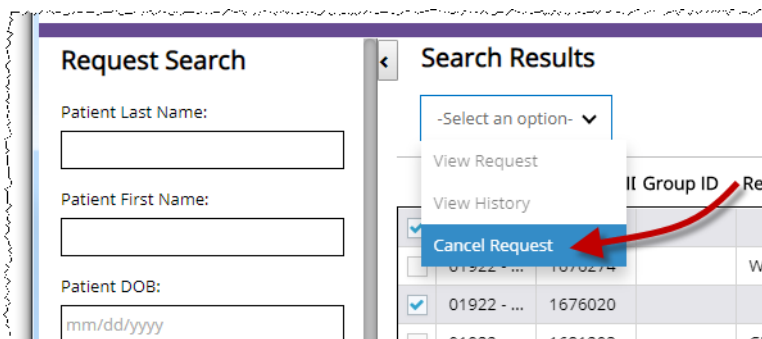
CANCEL REQUESTS VIA REQUEST SEARCH

Ciox Executives and **Account Managers** (page 29) can now **Cancel** multiple requests simultaneously through the **Request Search** tool. Previously, you could only delete a request by opening it individually.

1. Requests in any **Logging** or **Fulfillment** stage can be canceled. This stages include **Logging / Fulfillment On Hold, Exception, and QC**.
2. Locate the request(s) using the **Request Search** tool.
3. Select the request(s) by clicking the checkbox(es). You can select a single request or as many as five (5) requests.



4. From the **Select an option** list, choose Cancel Request.



5. On the **Cancel Request(s)** window:

5.1 Select a **Cancel Reason** (required);

5.2 A **Comment** is automatically added, based on the selected **Reason**. You can add more information if needed.

5.3 Click **Cancel Request(s)**.

SOURCE

Cancel Multiple Request(s) [X]

*Cancel Reason
Duplicate ▾

*Comments: (Max 1000 Characters)
September 17, 2018 4:43 PM, Jeff Nold cancelled Requests because of Duplicate. You can add more details.

Cancel Request(s)

6. The request(s) are canceled and cannot be retrieved.

NEW REQUESTER ENHANCEMENTS

Members of the **New Requester** team, who research requests that could not be matched with an existing customer during **Logging**, will see two major improvements in **HealthSource v1.1**:

- [Apply new requester to multiple requests](#)
- [Create new requester with same address as existing customer](#)

Membership on the **New Requester** team is assigned by the Ciox Health implementation and operations group ([page 29](#)), not by **Group Administrators**.

Apply new requester to multiple requests

HealthSource v1.1 can apply a newly-created requester to multiple requests, eliminating the need to open each request individually.

1. Open a request with a **Task Type** of New Requester.
2. Add a new requester and submit or save the request.

3. **HealthSource** searches the current inventory of **New Requester** items and displays possible matches.

HEALTH X SOURCE Jeff Nold 🔍 ? ⏻

Number of matching request(s): 2

eRequest ID	Requester found in the Request Letter		Recommended Requester				
	Requester Name	Address	Requester ID	Requester Name	Address	Major Class	Delivery type
1773350	GREEN BAY APPLICATIONS	925 NORTH POINT PKWY, ALPHARETTA, GA, USA- 30005	1946004	AFFINITY HEALTH - REC STOR	925 North Point Parkway, Alpharetta, GA, UNITED STATES- 30005	Facility	Mail
1676240	UNIDENTIFIED INVOICES	120 BLUEGRASS VALLEY PKWY, ALPHARETTA, GA, USA- 30005	1946004	AFFINITY HEALTH - REC STOR	925 North Point Parkway, Alpharetta, GA, UNITED STATES- 30005	Facility	Mail

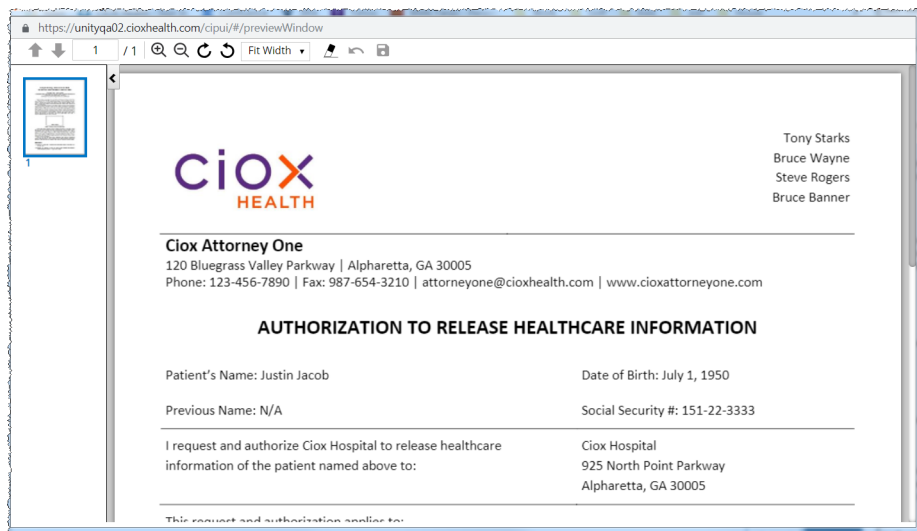
- Compare the requester name and address for the possible matches to the information for the newly-created requester.
- Click the **eRequest ID** link to see the Request Letter in a pop-up.

Number of matching request(s): 2

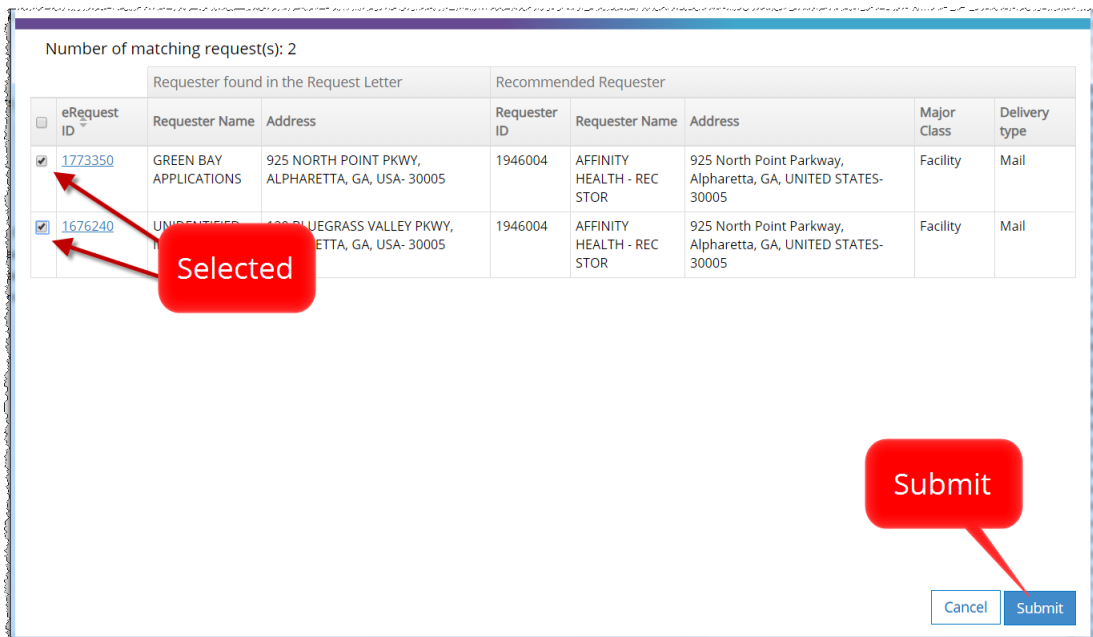
eRequest ID	Requester Name	Requester Address	Requested Requester	Requester Name
1773350	GREEN BAY APPLICATIONS	925 NORTH POINT PKWY, ALPHARETTA, GA, USA- 30005	1946004	AFFINITY HEALTH - REC STOR
1676240	UNIDENTIFIED INVOICES	120 BLUEGRASS VALLEY PKWY, ALPHARETTA, GA, USA- 30005	1946004	AFFINITY HEALTH - REC STOR

View Request Letter

- Review the letter to determine if it was sent by the newly-created requester.



7. Select the checkbox for each request that was sent by the newly-created requester.
8. Click **Submit**.



9. **HealthSource** automatically assigns the newly-created requester to the selected requests. The **Task Type** for the request(s) changes to Logging.

Create new requester with same address as existing customer

You can now add a new requester that has the same physical address as an existing requester, as long as the new customer:

- Has a different **Name**:
- Belongs to a different **Major Class**.

You'll still see the **Duplicate Requester(s) Results** message, but clicking **Save** at the bottom of the screen adds the new requester and assigns it to the request.

Requester Information

*Requester Name: PATIENT ADVOCACY NETWORK *Major Class: Indirect Payor


Billing Information

*Country: UNITED STATES

*Address 1: 1821 MORENO ST Address 2: Address 3:

*City: OCEANSIDE *State: CA *Zip: 92054-6020

Phone: Fax: Email:

 **Duplicate Requester(s) 2 Results found**
Please select the correct requester.

Requester ID	Requester Name	Address	Major Class	Delivery Type
2165978	JD Law	1821 MORENO ST, ...	Attorney	Mail
2166008	JEFF NOLD MEDICA...	1821 MORENO ST, ...	Peer Review Organi...	Mail

Add new requester

SITE PREFERENCES

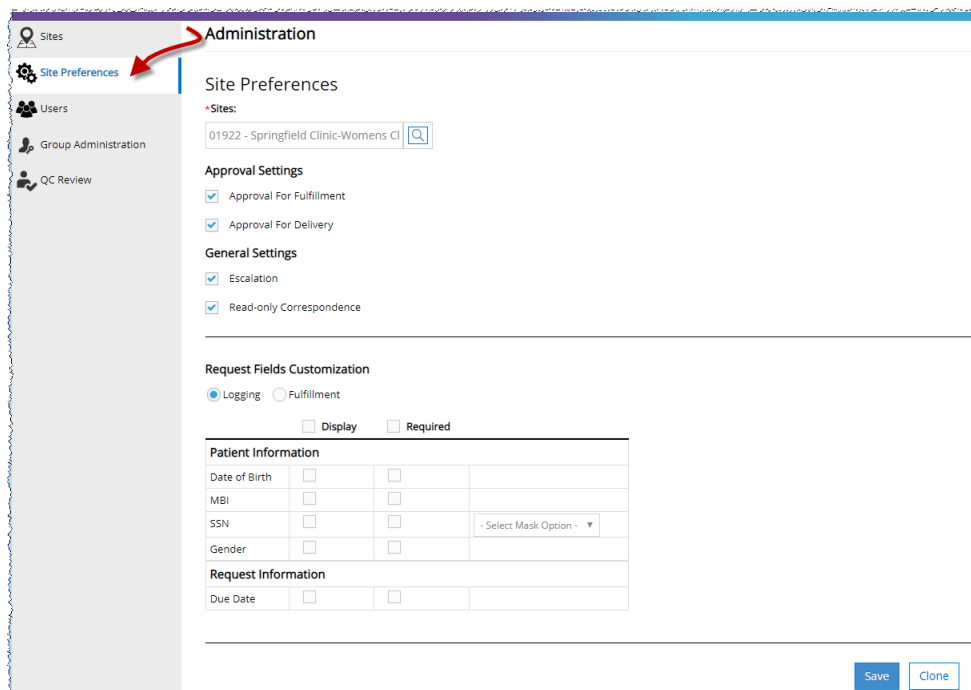


Site Preferences should **ONLY** be used for Sites in our Pilot program.
If your Site is not part of the Pilot, do **NOT** enable any **Preferences**.

Group Administrators can define site-level settings that determine if and how requests:

- Flow through an approval cycle;
- Can be escalated for closer attention by a supervisor;
- Allow editing of Correspondence;
- Use custom data entry fields.

These settings are made on the **Site Preferences** page, accessed from the **Administration** option on the **Menu**.



The screenshot shows the 'Site Preferences' page for the site '01922 - Springfield Clinic-Womens Cl'. The page is divided into several sections:

- Approval Settings:**
 - Approval For Fulfillment
 - Approval For Delivery
- General Settings:**
 - Escalation
 - Read-only Correspondence
- Request Fields Customization:**
 - Logging Fulfillment
 - Display Required
- Patient Information:**

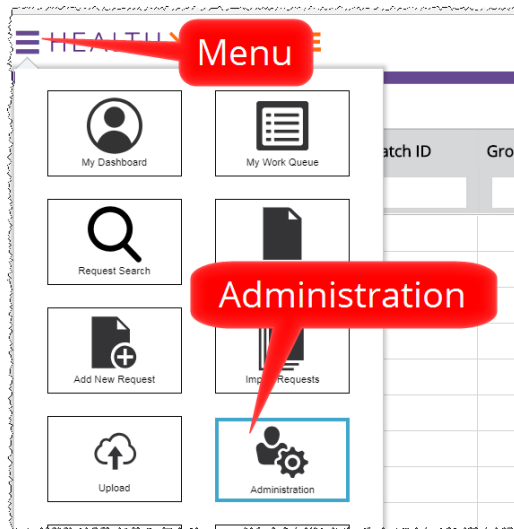
Field	Display	Required
Date of Birth	<input type="checkbox"/>	<input type="checkbox"/>
MBI	<input type="checkbox"/>	<input type="checkbox"/>
SSN	<input type="checkbox"/>	<input type="checkbox"/>
Gender	<input type="checkbox"/>	<input type="checkbox"/>
- Request Information:**

Field	Display	Required
Due Date	<input type="checkbox"/>	<input type="checkbox"/>

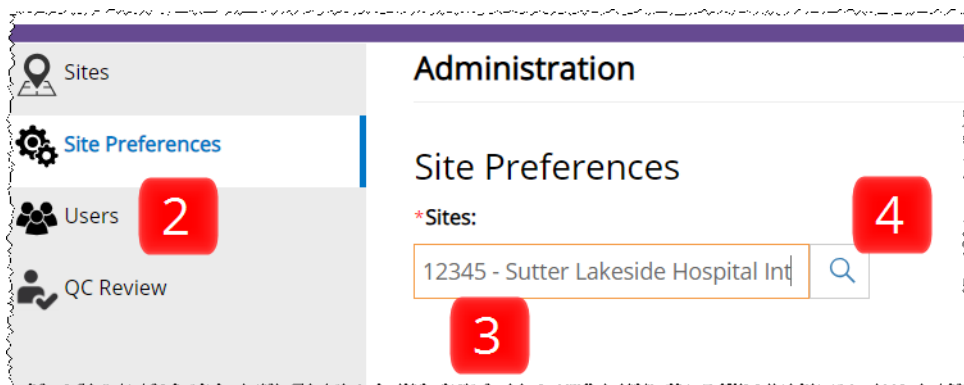
At the bottom right of the page, there are 'Save' and 'Clone' buttons.

Set Site Preferences

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



2. On the **Administration** screen, click **Site Preferences**.
3. Enter the Site Number in the **Sites** field.
4. Click the **Search** button.



5. Specify the settings as needed and click **Save**.

Setting	Description
Approval Settings These options should only be used by Sites in our Pilot program. Enabling them at other Sites could decrease productivity.	
General Settings	
Escalation	Adds <u>Escalations</u> as an Exception Reason for Fulfillment . See page 14 for more information.
Read-only Correspondence	Disables the Edit option for Correspondence . <u>Other</u> is NOT available as a Reason on the Create Correspondence screen. See page 37 for more details.
Request Fields Customization You CANNOT create new custom data entry fields in HealthSource v1.1 .	
Logging / Fulfillment	Where the data entry field(s) will be displayed. To show the same field on the Logging and Fulfillment screens, you must configure it separately for both.
Display	If selected, the field will be displayed on the data entry screen,.
Required	If selected, the Logger or Fulfiller must complete the field before the request can be submitted.

OTHER IMPROVEMENTS

In addition to the major changes described earlier in this document, **HealthSource v1.1** adds several smaller fixes to make ROI processing more efficient and accurate:

Removed default address for Continuity of Care requests	<p>HealthSource will no longer auto-populate the Ship To address with the Ciox corporate address for Continuity of Care requests.</p> <p>This change prevents the Medical Records from being accidentally shipped to Ciox Alpharetta through our automated process.</p>
Split requests now go through Automated Data Extraction	<p>Each Request Letter page added to a new request through the Split function will be automatically evaluated for requester and patient data. This change cuts down the manual data entry needed to log these requests.</p>
Patient directive requests delivered by electronic device retain the actual shipping address	<p>The original Ship To address is retained when the Special Processing option of <u>Electronic Device</u> is selected for a patient directive.</p> <p>Previously, choosing this option caused the Ship To address to switch to the patient's address, even if the electronic device was shipped somewhere else.</p>
View original Pull List document from child requests	<p>The original Request Letter for a Pull List, which acts as a "parent" and identifies multiple patients, can be viewed by Loggers and Fulfillers working on any "child" request.</p> <p>The original pages are attached after the Cover Sheet that HealthSource automatically creates for Pull List children.</p> <p>The original Pull List will be part of the request package sent to the requester.</p>
Employee ID accuracy	<p>All requests will be associated with the correct Employee ID number.</p> <p>This change supports more accurate productivity reporting and allows corporate personnel to communicate with HealthSource users through the RepOnline application.</p> <p>Previously, some requests were linked to a default Employee ID value of 13.</p>
RAC option for Insurance requests	<p>If the Major Class for a requester = <u>Insurance</u>, the Primary Reason for Request field now includes RAC as a choice.</p>
Improved HealthSource Plug In	<p>The HealthSource Plug In (Tray App) has been updated to support future enhancements.</p>
More reliable	<p>HealthSource now hashes Medical Records to increase overall application reliability.</p>