



HealthSource v1.2 Release Notes

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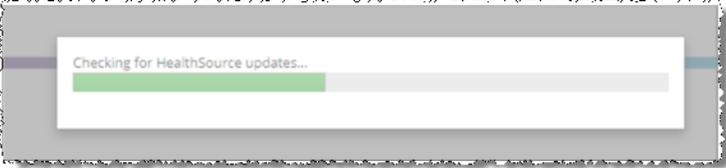
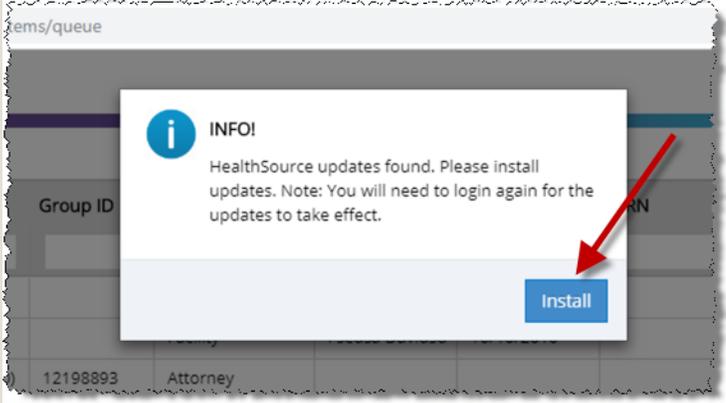
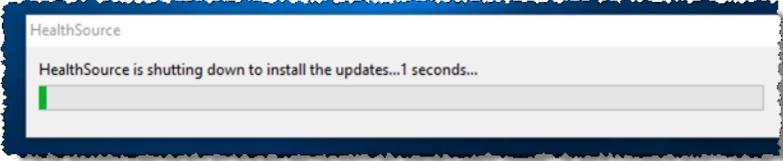
HealthSource Clarity v1.2 Release Notes

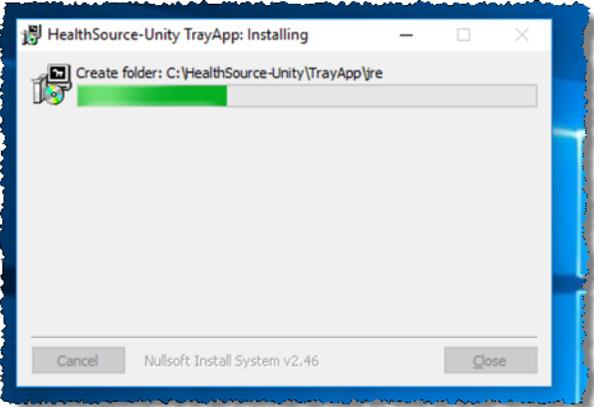
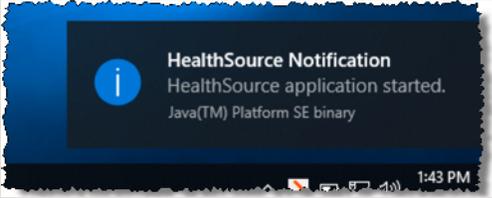
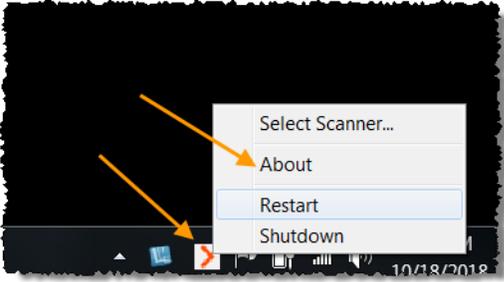
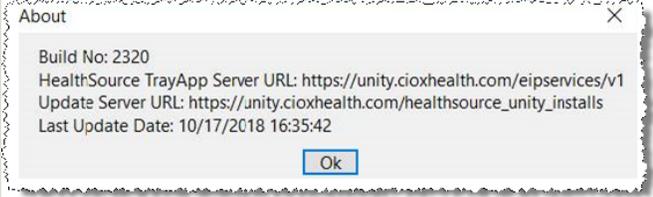
This document describes changes made in **HealthSource Clarity v1.2**.

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TRAYAPP UPDATE REQUIRED

To use **HealthSource Clarity v1.2**, you **MUST** update the **TrayApp**.

<p>Log into HealthSource Clarity and wait until the Update bar closes.</p>	
<p>Click Install on the Info box.</p>	
<p>HealthSource Clarity logs you out.</p>	
<p>Close your browser completely.</p>	
<p>The TrayApp shuts down automatically. This step happens so quickly you may not see the notice.</p>	
<p>HealthSource Clarity downloads and validates the new version of the TrayApp.</p>	

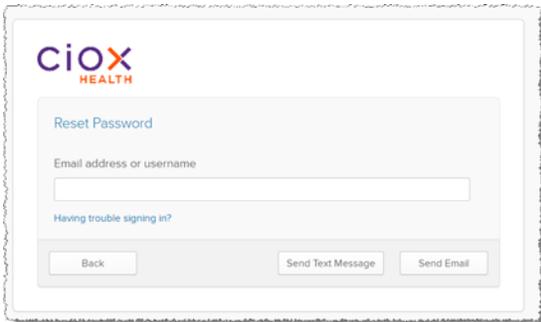
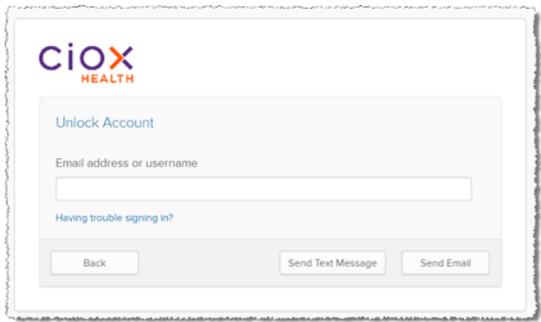
<p>The TrayApp update installs itself.</p>	
<p>The updated TrayApp starts itself.</p>	
<p>Right-click the TrayApp in your Windows Tray and select About.</p>	
<p>Does the Build No = 2320?</p> <ul style="list-style-type: none"> • YES — Click OK. • NO — Contact Customer Care at 877-358-6939. 	

RESET PASSWORDS AND UNLOCK ACCOUNTS

The **Login** page now includes two commands to help users regain access to **HealthSource** without contacting the Customer Care team:

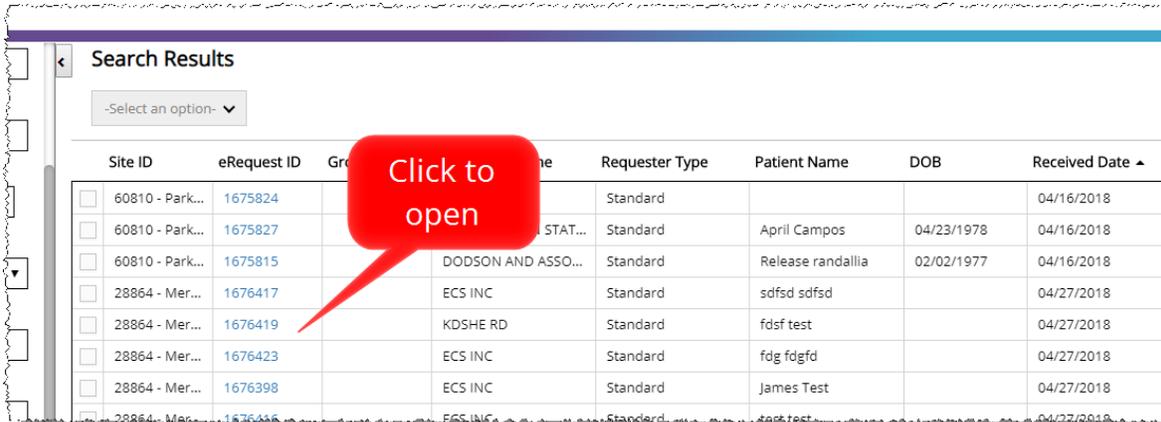
- Forgot password
- Unlock account



Forgot Password	Unlock Account
<p>1. Opens the Reset Password page.</p>  <p>2. Enter your User ID — the email address or name that you normally use to log in to HealthSource Clarity.</p> <p>3. Click Send Text Message or Send Email.</p> <ul style="list-style-type: none"> • Text Message: A code will be sent to the mobile number associated with your account. Enter this code on the Code sent! page. • Email: You'll receive an email with a link to reset your password. 	<p>1. Opens the Unlock Account page.</p>  <p>2. Enter your User ID — the email address or name that you normally use to log in to HealthSource Clarity.</p> <p>3. Click Send Text Message or Send Email.</p> <ul style="list-style-type: none"> • Text Message: A code will be sent to the mobile number associated with your account. Enter this code on the Code sent! page. • Email: You'll receive an email with a link to unlock your account.

REQUEST SEARCH IMPROVEMENTS

After you run a **Request Search**, you can now open a request directly from the **Search Results** by clicking the blue link in the **eRequest ID** column.



Site ID	eRequest ID	Gr...	ne	Requester Type	Patient Name	DOB	Received Date
60810 - Park...	1675824			Standard			04/16/2018
60810 - Park...	1675827		STAT...	Standard	April Campos	04/23/1978	04/16/2018
60810 - Park...	1675815		DODSON AND ASSO...	Standard	Release randallia	02/02/1977	04/16/2018
28864 - Mer...	1676417		ECS INC	Standard	sdfsd sdfsd		04/27/2018
28864 - Mer...	1676419		KDSHE RD	Standard	fdf test		04/27/2018
28864 - Mer...	1676423		ECS INC	Standard	fdg fdgfd		04/27/2018
28864 - Mer...	1676398		ECS INC	Standard	James Test		04/27/2018
28864 - Mer...	1676435		ECS INC	Standard	test test		04/27/2018

The request opens in either read-only or edit mode, depending on your **Role** and the **Task Type** of the request.

For example, a **Logger** who opens a **Fulfillment** request will see it in a read-only view, but would be able to edit a **Logging** request.

New Days Due search

The screenshot shows a search form with the following fields and filters:

- Empty search bar
- Patient DOB:
- Site Location:
- Task Type:
- eRequest ID:
- Log ID:
- Invoice Number:
- Requester Name:
- Requester Number:
- Group ID:
- Facility Received Date: From To
- Days Due:
- Number of Days:

Two red arrows point to the 'Days Due' dropdown and the 'Number of Days' input field.

You can now search for requests that are due within a specific time period.

The **Search Results** table includes a new **Days Due** column to display this information. This column may be empty for older requests. See [page 10](#) for more information on the new **Due Date** feature.

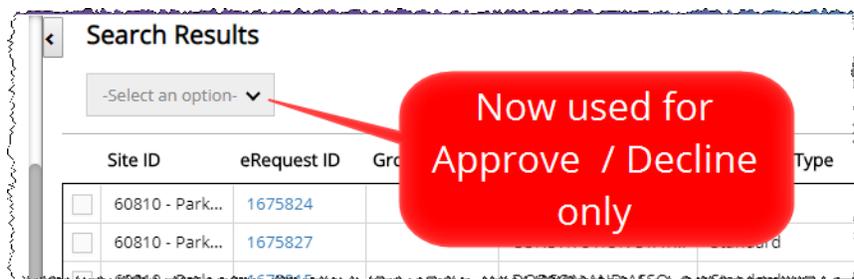
Command list changes

We've changed how the **Command** list at the top left corner of the Search Results page works.

Command list disabled except for Approval sites

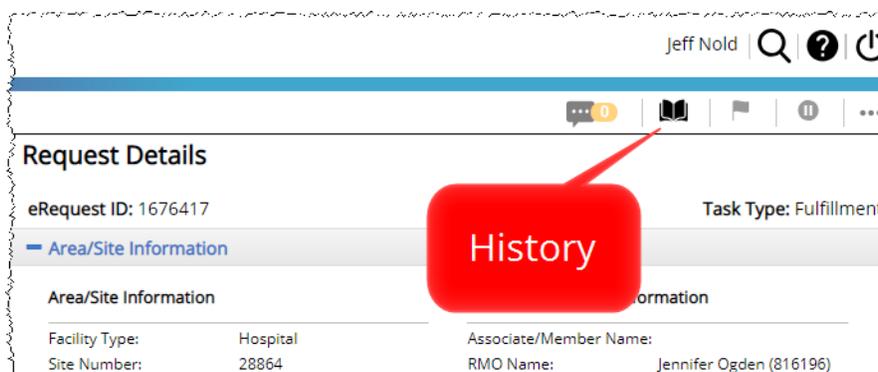
The **Command** list is disabled if:

- your Site does not use the **Approval for Fulfillment** feature;
- your Site does use the **Approval for Fulfillment** feature, but your **Role** does not allow you to approve / decline requests for **Fulfillment**.



View History

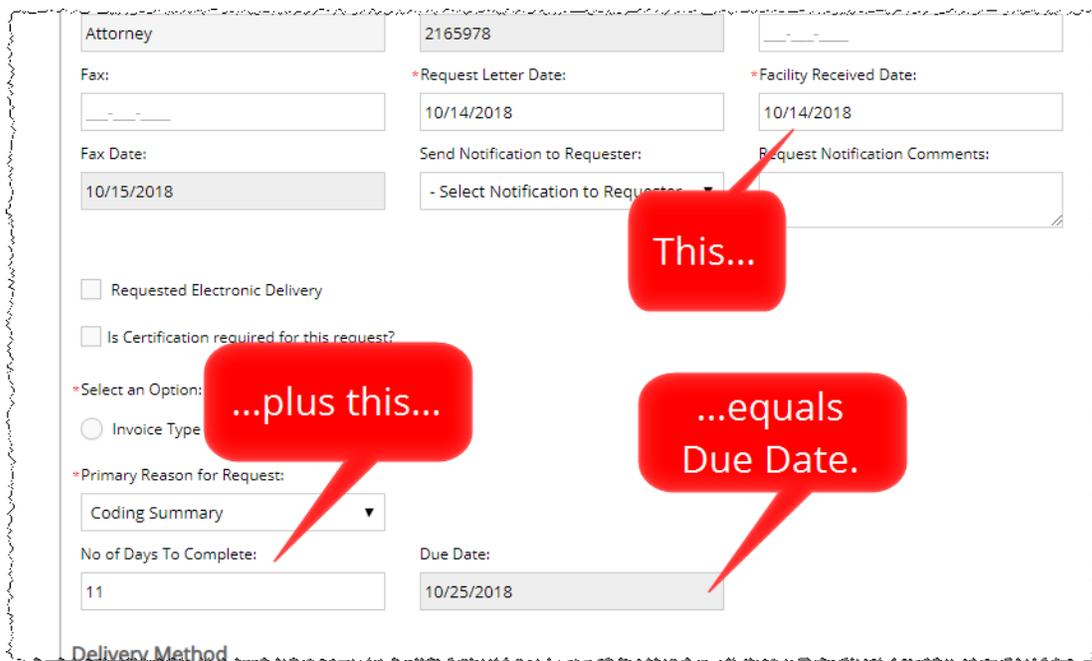
Instead of selecting the **View History** option from the **Command** list, you now open the request using the blue link and click the **History** option on the request itself.



DUE DATE FIELDS

The **Logging** and **Fulfillment** screens include two new data entry fields for all requests:

Field	Definition	Editable?
No of Days To Complete	How many days allowed to deliver Medical Records after receiving the Request Letter.	Yes, in both Logging and Fulfillment . Will be automatically filled if left blank by Logger and the Due Date Management (page 11) option is enabled.
Due Date	When Medical Records must be delivered to the requester.	Never. Calculated by adding No of Days To Complete to the Facility Received Date .



The screenshot shows a form with various fields. Two red callout boxes are present:

- A callout box labeled "This..." points to the "Facility Received Date" field, which contains the value "10/14/2018".
- A callout box labeled "...plus this..." points to the "No of Days To Complete" field, which contains the value "11".
- A callout box labeled "...equals Due Date." points to the "Due Date" field, which contains the value "10/25/2018".

The form also includes fields for "Attorney", "Request Letter Date" (10/14/2018), "Facility Received Date" (10/14/2018), "Fax Date" (10/15/2018), "Send Notification to Requester" (dropdown), "Request Notification Comments", "Requested Electronic Delivery" (checkbox), "Is Certification required for this request?" (checkbox), "Select an Option" (radio buttons for "Invoice Type"), "Primary Reason for Request" (dropdown menu with "Coding Summary" selected), and "Delivery Method".

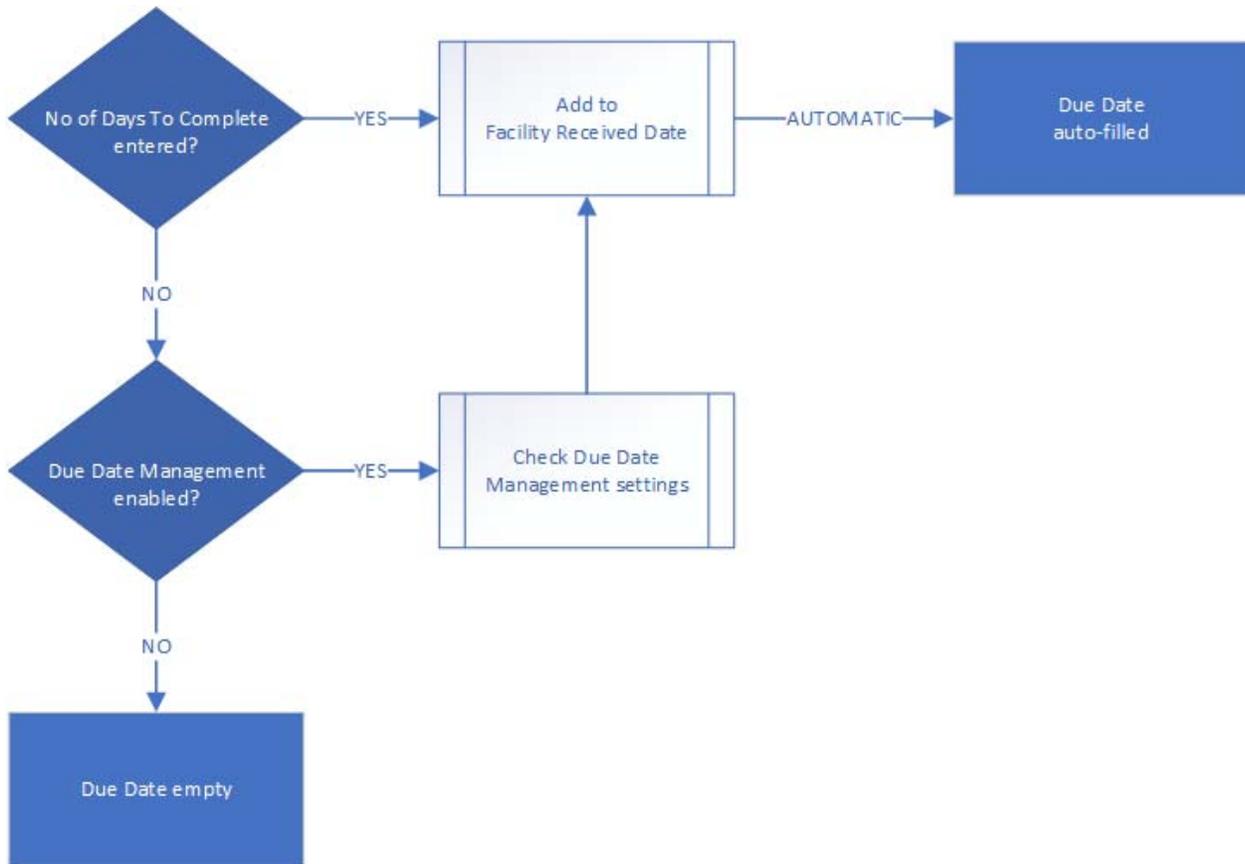
Not required except for PRO requests

The **No of Days To Complete** field is **OPTIONAL** for all **Request Types** except **PRO**.

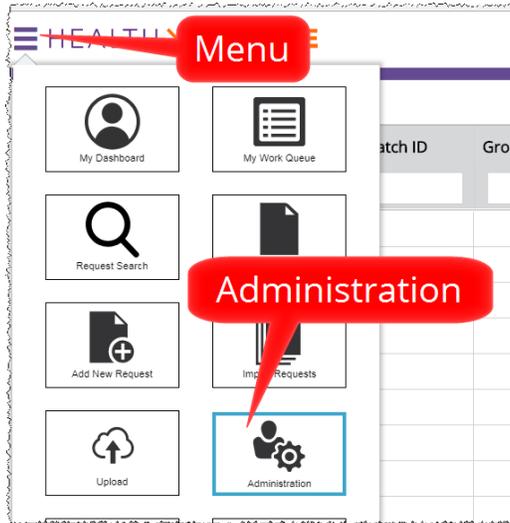
This field was already part of the **PRO** request workflow before v1.2.

Due Date Management option

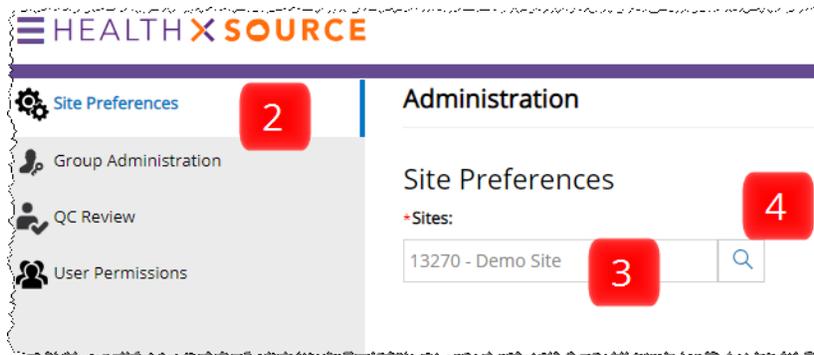
HealthSource Clarity can be configured to automatically determine the **Due Date** if **Loggers** and / or **Fulfillers** do **NOT** enter a value in the **No of Days To Complete** field.



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. Select the **Enable Due Date Management** option.
6. To see the default date values, open the **Due Date Management** section.

The screenshot shows the 'Administration' page with 'Site Preferences' for '13270 - Demo Site'. Under 'General Preferences', the 'Enable Due Date Management' checkbox is checked and highlighted with a red circle containing the number 5. Below it, the 'Due Date Management' section is expanded, also highlighted with a red circle containing the number 6. At the bottom right, there are 'Clone', 'Cancel', and 'Save' buttons.

7. Click the + sign to see the default date values for a specific **Major class** and **Requester** combination. You can't change these values.

Due Date Management

Major class	Requester Type	Reasons for Request
- Attorney	Attorney	Coding Summary, Defense Attorney, Disability Forms Completion, Hospital Lien, Patient Directive, Personal Injury, Scan for Coding, Social Security, State Attorney Office, Subpoena, Workers Comp

Reasons for Request	Number Of Calendar Days
Coding Summary	5
Defense Attorney	5
Disability Forms Completion	5
Hospital Lien	5
Patient Directive	5
Personal Injury	5
Scan for Coding	5
Social Security	5
State Attorney Office	5
Subpoena	5
Workers Comp	5

8. Click **Save** at the bottom of the **Site Preferences** page.
9. The **No of Days To Complete** field is auto-filled when:
 - 9.1 the **Logger** does not enter a value in the field;
 - 9.2 the request moves from **Logging** to **Fulfillment**.

Where can you see Due Date information?

My Work Queue

My Work Queue now includes a **Due Date** column.

This column replaces **Batch ID**, which was available in earlier versions.

HEALTH X SOURCE | Jeff Nold | Q ? | Power icon

My Work Queue | Displaying 1 - 1000 of 1072 items

STAT	Site ID	eRequest ID	Group ID	Requester Typ	Patient Nam	DOB	Received Date	Due Date	Task Type	Reason
	40784 - Den...	2420049		Attorney	kkdcj khsd		10/11/2018 01:...	10/21/2018	Fulfillment	
	45410 - Cpg...	2449300		Attorney	PETER PE...		10/15/2018 10:...	10/20/2018	Approval fo...	
	ST... 45410 - Cpg...	2450428		Continuing ...	test tse	01/02/1999	10/15/2018 03:...	10/18/2018	Redo Logging	
	ST... 31233 - Rop...	2404081		Continuing ...	ndnndnd ...	01/01/1950	10/10/2018 10:...	10/15/2018	Approval fo...	

Request Search

As described on [page 8](#), you can search by **Days Due**.

If the **Due Date** has passed, this value will show the number of days “over” — how late it is.

Search Results | -Select an option- | Displaying 1 - 1 of 1 items

Site ID	eRequest	Group ID	Requester Nam	Requester Typ	Patient Name	DOB	Received Date	Days Due	Task Type
36002 ...	1753104		JD Law	Standard	Jeff Nold		06/29/2018	79 Over	Fulfillment

My Holds

Not yet available.

Request Details Report

The **Request Details Report** includes a **Due Date** column.

AUTO-SELECT REQUESTER

If **HealthSource Clarity** finds an exact match for the requester during **Logging**, the **Create New Requester** button will be **DISABLED**.

This change will help stop the accidental routing of requests to the **New Requester Team**.

The screenshot shows a web form for creating a requester. At the top, there is a dropdown for 'Site Location' set to '13270 - Demo Site' and a search icon. Below that is the 'eRequest ID: 2130448'. The main section is titled 'Request Information' and contains a 'Request Type' section with radio buttons for 'Standard' (selected), 'Patient', 'DDS', 'PRO', and 'Pull List'. Below this are input fields for 'Name' (Requester Name), 'Address' (5 Saddlewood Ct), and 'Zip' (29926). There are two buttons: 'Find Requester' and 'Create New Requester'. A red callout bubble with the word 'Disabled' points to the 'Create New Requester' button. Below the form, there is a search result section with fields for 'Country' (UNITED STATES), 'Requester Name' (V1.2 TEST REQUESTER), 'Address' (5 SADDLEWOOD CT), 'State' (SC), 'Zip' (29926-2607), and 'Major Class' (Insurance Company). A red callout bubble with the text 'Exact match' points to the search result.

This rule applies whether:

- there was only one match;
- there were multiple possibilities, from which the **Logger** picked one.

What if the wrong requester gets selected?

Do **NOT** submit a request if you know that **HealthSource Clarity** assigned the wrong requester.

This problem can be caused by several issues, including but not limited to:

- Multiple requesters work out of the same building with different Suite numbers;
- An existing requester merged with or was bought out by another, so that the office is located at the same place but the name on the Request Letter is different;
- The requester has moved its office location but Ciox has not yet updated our information.

Possible solutions:

1. Search for the requester again, but change some of the search values. If you searched only by **Address** and **Zip** before, try including the **Name** as well.
2. Run another search with “nonsense, like an **Address** of “123 Anystreet” with a **Zip** of 00000. This search clears the “wrong” requester. You can then click **Create New Requester**.
3. Flag the request as an **Exception**.

NEW SEPARATOR SHEET FOR BULK FAXED REQUESTS

Centralized Logging Sites load Request Letters into **HealthSource Clarity** by sending them to a specific fax number. Multiple Request Letters can be faxed at the same time, and a new eRequest should be automatically created for each letter.

Originally, we believed that a blank sheet of paper would be enough to identify the break between Request Letters, but the blank page was often “missed” and requests had to be **Split** manually.

For v1.2, we’ve created a new separator sheet. This sheet has the phrase **Ciox HealthSource Separator Page** printed on it three times, running in both directions vertically. This duplication ensures that **HealthSource Clarity** can read the words no matter which direction the sheet is placed in the fax.

Testing suggests that this new sheet is effective at “triggering” the separation of Request Letters.

Supervisors at Centralized Logging Sites should receive electronic versions of the new separator sheet that can be printed locally.

QUALITY CONTROL CHANGES

No **Attorney** requests will be sent for **Quality Control** review.

Changes made during **Quality Control** review are indicated by a checkmark on a **GREEN CIRCLE**.

The **Errors** field at the top right corner of the **QC** screen show the total number of changes made during **Quality Control** review.

The screenshot shows a web form for "Task: Logging Quality Control". At the top right, it displays "Errors: 4". A red callout box labeled "Running total" points to this field. The form includes fields for "Site Location" (Alpharetta, GA), "Zip" (30005), "Requested By" (QC Test), and "ATTN" (Documentation). All these fields have a green checkmark. A second red callout box labeled "Changed during QC" points to these checkmarks. Below, the "Patient Information" section has fields for "Last Name" (DF), "MRN", and "Patient Account/Control #". The "Dates of Service" section has two date pickers. The "Medical Information" section has a field for "Select Requested Record Types" with a green checkmark and a radio button for "Entire Record".