HealthSource v1.2 Release Notes

October 2018

Document History

Publication Date: October 18, 2018
Document Edition: 1.0

Contact Information

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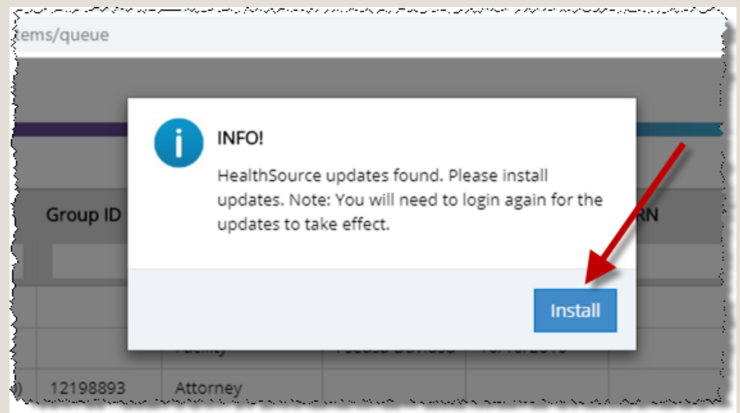
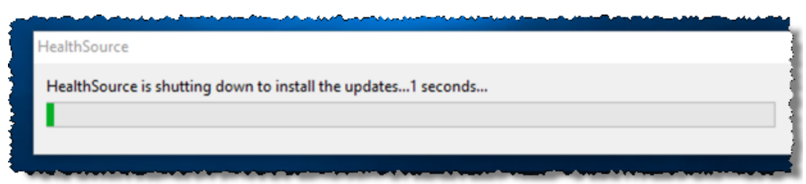
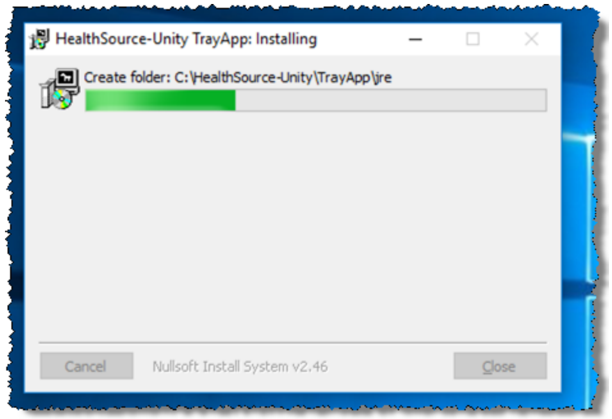
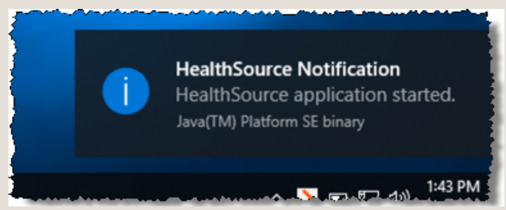
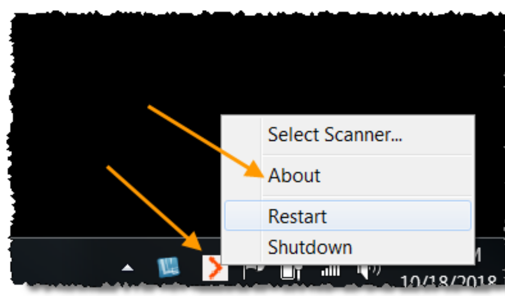
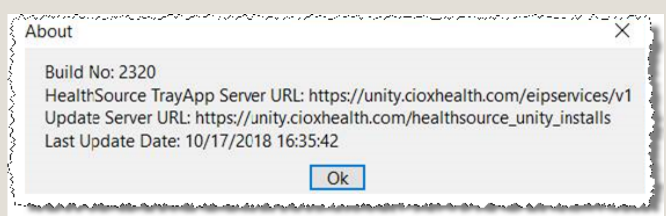
HealthSource Clarity v1.2 Release Notes

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

TrayApp update required

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

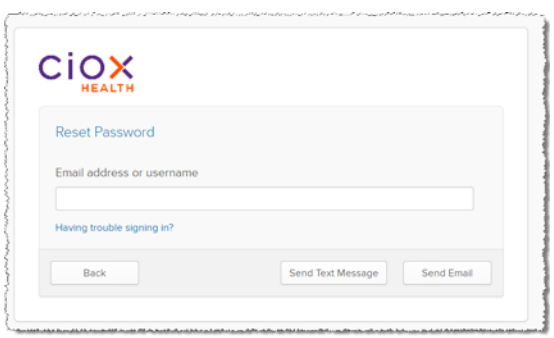
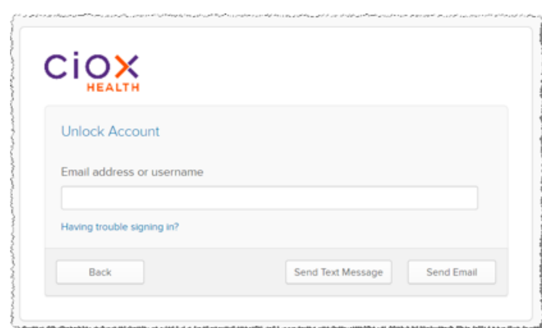
Log into **HealthSource Clarity** and wait until the **Update** bar closes.	
Click **Install** on the **Info** box.	
HealthSource Clarity logs you out.	
Close your browser completely.	
The **TrayApp** shuts down automatically. This step happens so quickly you may not see the notice.	
HealthSource Clarity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

The **TrayApp** update installs itself.	
The updated **TrayApp** starts itself.	
Right-click the **TrayApp** in your **Windows Tray** and select **About**.	
Does the **Build No** = 2320?	
• **YES** — Click **OK**.	
• **NO** — Contact Customer Care at 877-358-6939.	

Reset passwords and unlock accounts

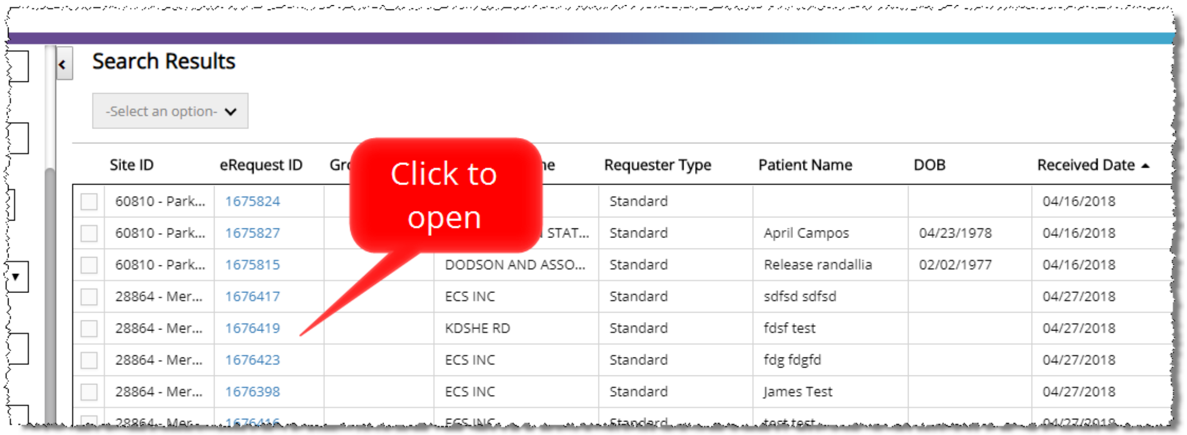
The **Login** page now includes two commands to help users regain access to **HealthSource** without contacting the Customer Care team:

- Forgot password
- Unlock account

Forgot Password	Unlock Account
1. Opens the **Reset Password** page.	1. Opens the **Unlock Account** page.
	
2. Enter your **User ID** — the email address or name that you normally use to log in to **HealthSource Clarity**.	2. Enter your **User ID** — the email address or name that you normally use to log in to **HealthSource Clarity**.
3. Click **Send Text Message** or **Send Email**. • 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.	3. Click **Send Text Message** or **Send Email**. • 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

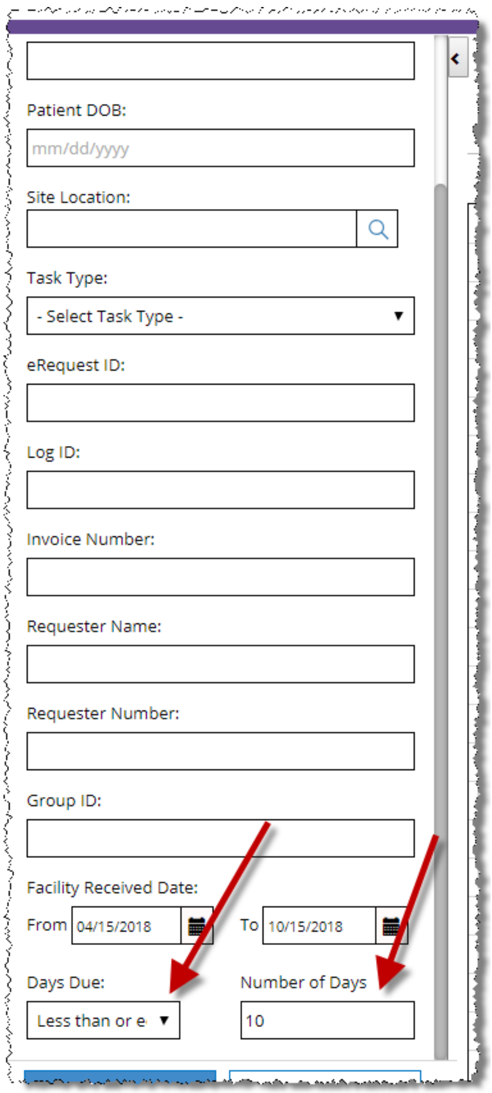
After you run a **Request Search**, you can now open a request directly from the **Search Results** by clicking the blue link in the **eRequest ID** column.



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



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.

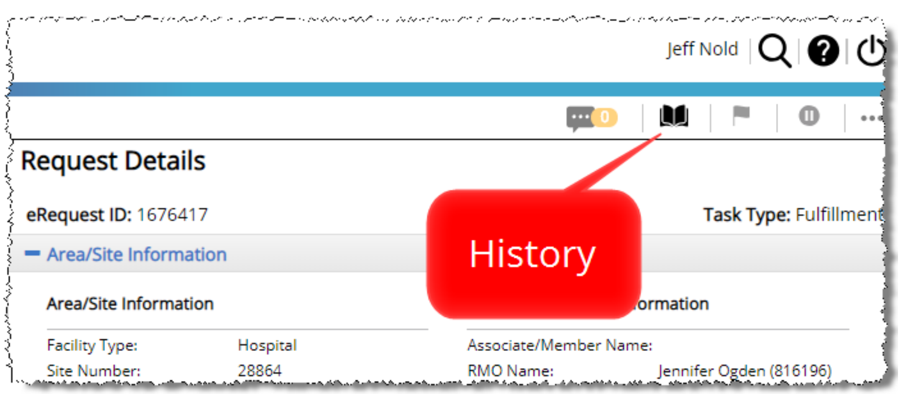
Command list disabled except for Approval sites

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

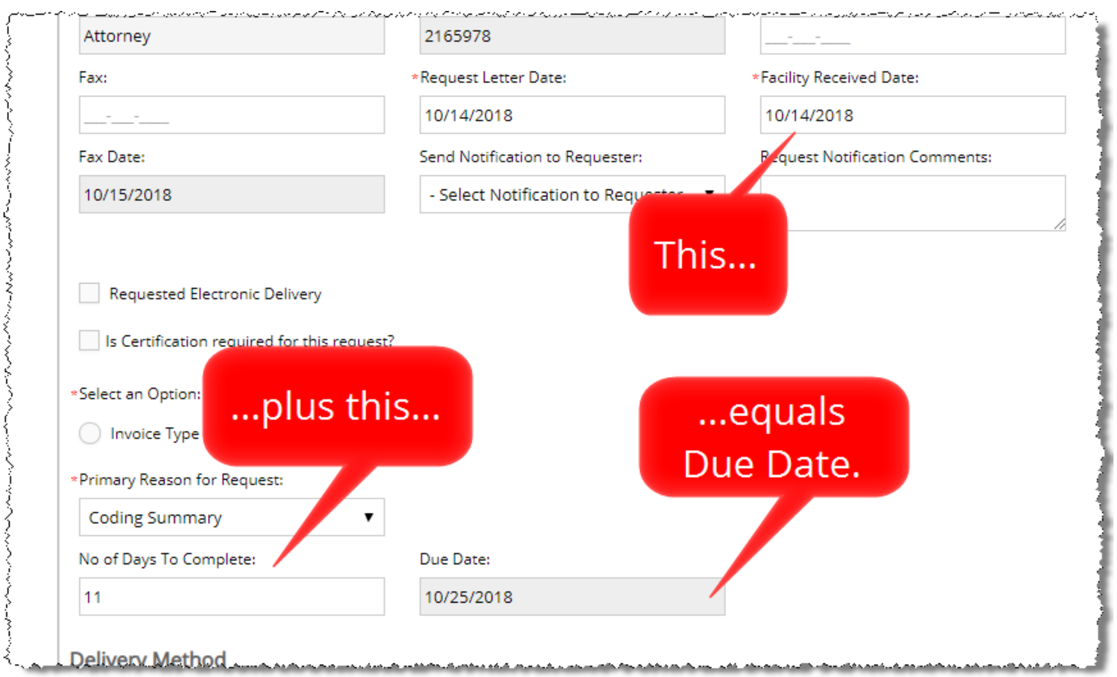
Instead of selecting the **View History** option from the **Command** list, you now open the request using the blue link and click the **History** option on the request itself.



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**.



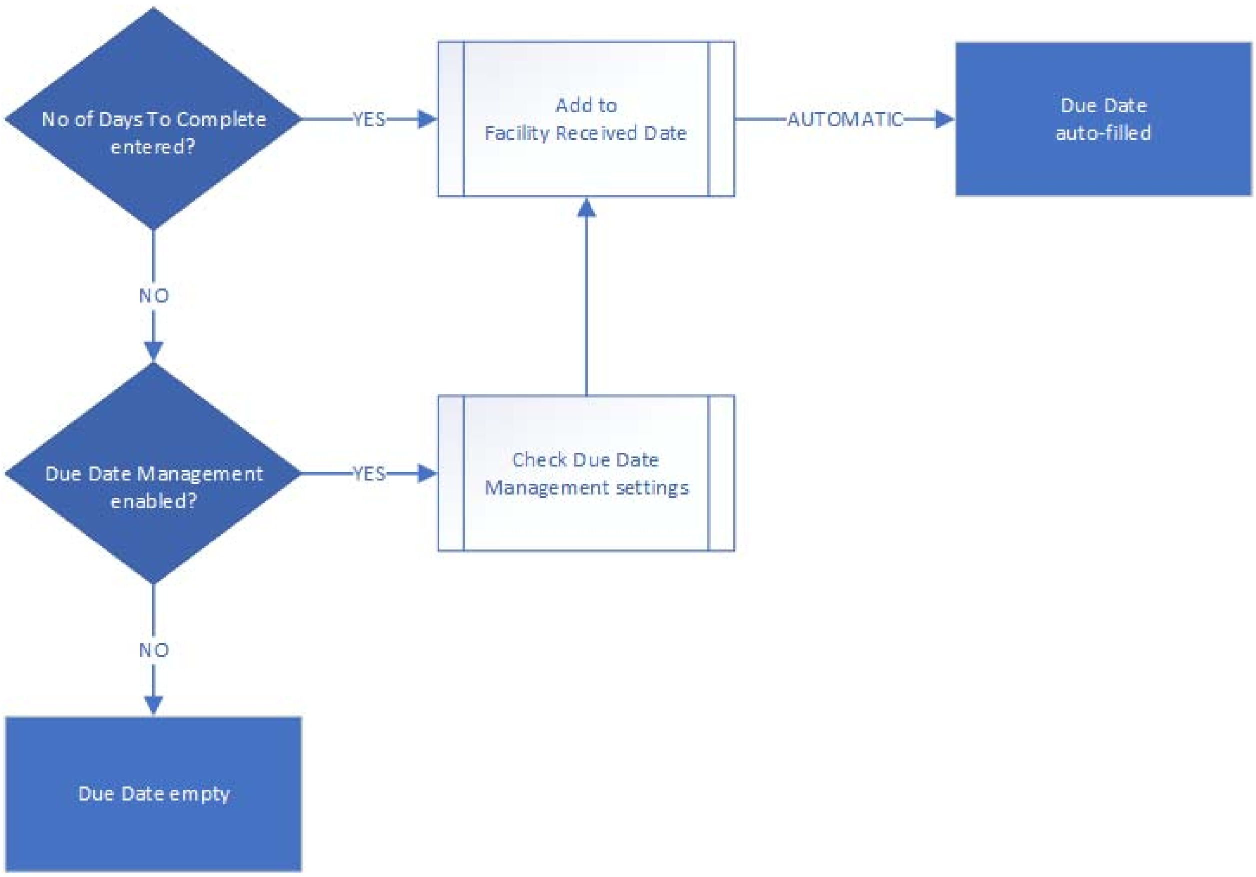
Not required except for PRO requests

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

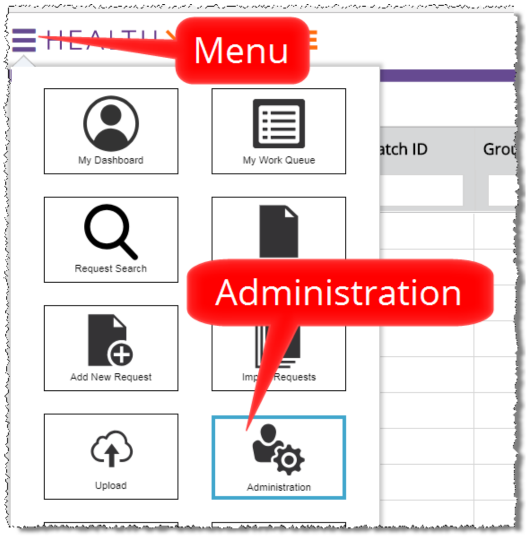
This field was already part of the **PRO** request workflow before v1.2.

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.



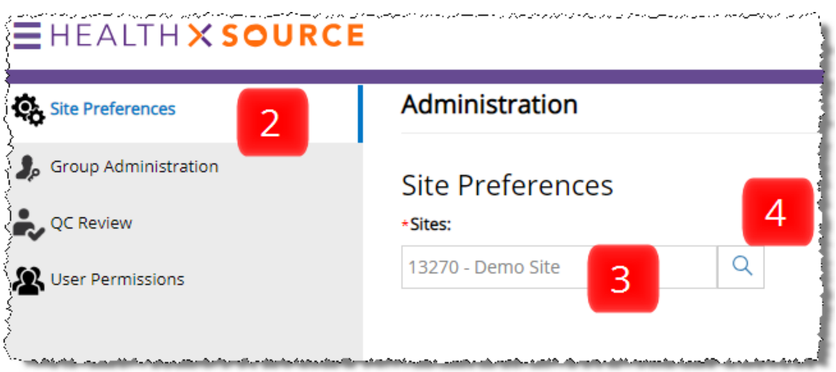
1. From the **Menu**, select **Administration**.



2. On the **Administration** screen, click **Site Preferences**.

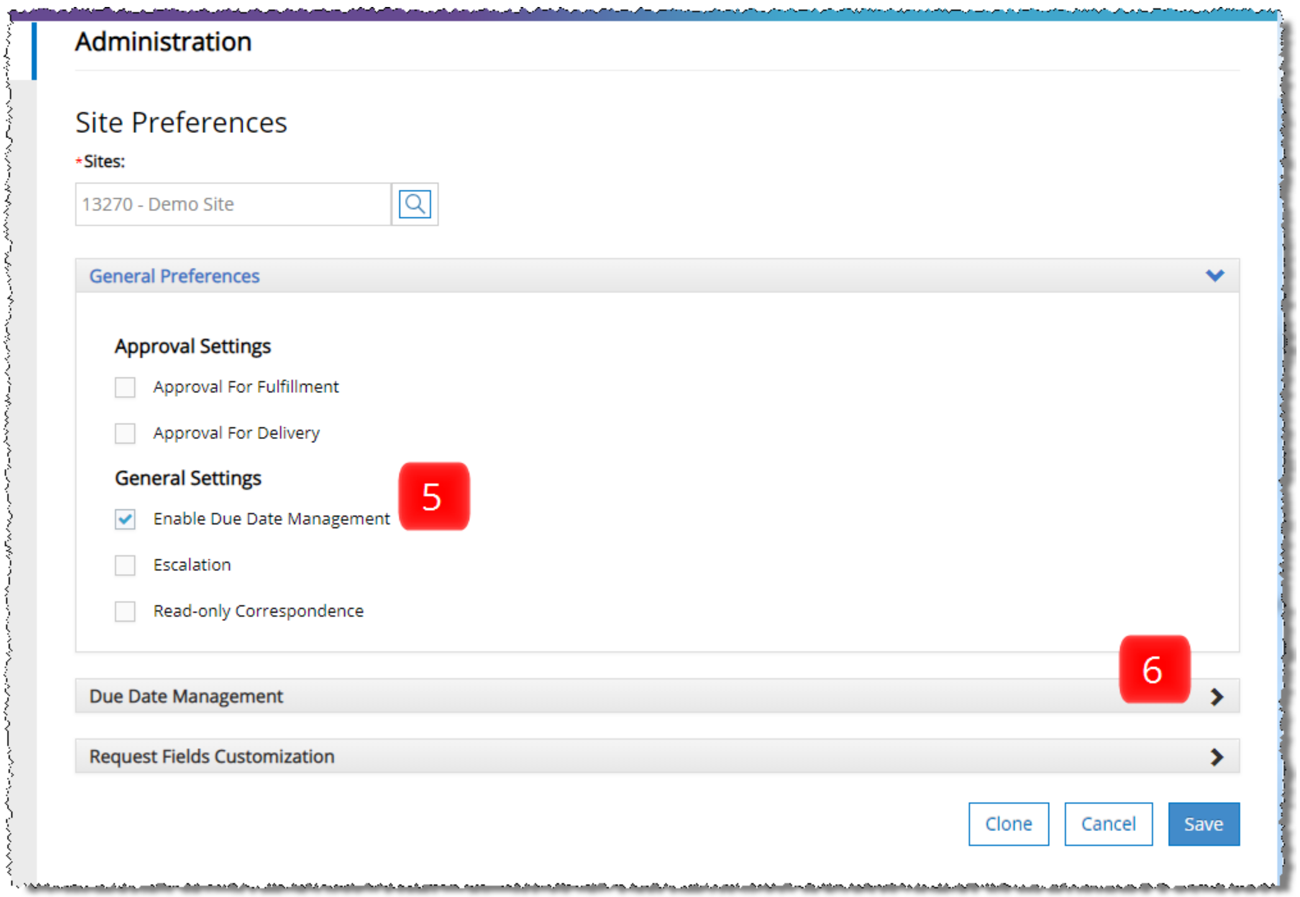
3. Enter the Site Number in the **Sites** field.

4. Click the **Search** button.

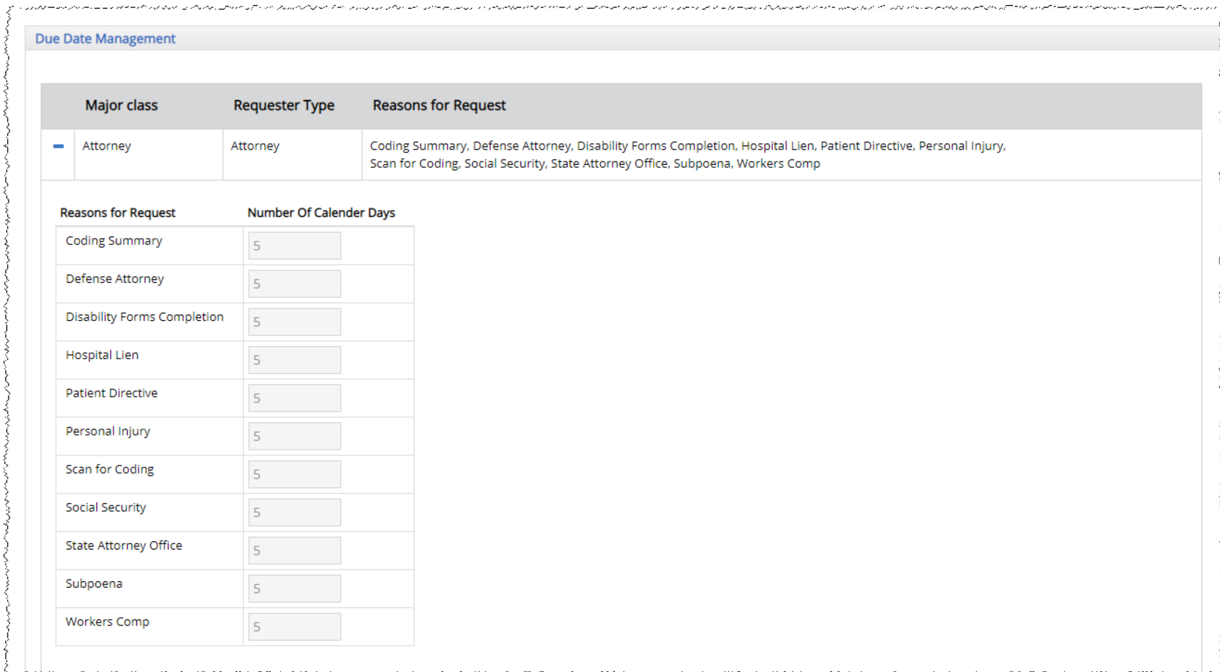


5. Select the **Enable Due Date Management** option.

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



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 Calender 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:

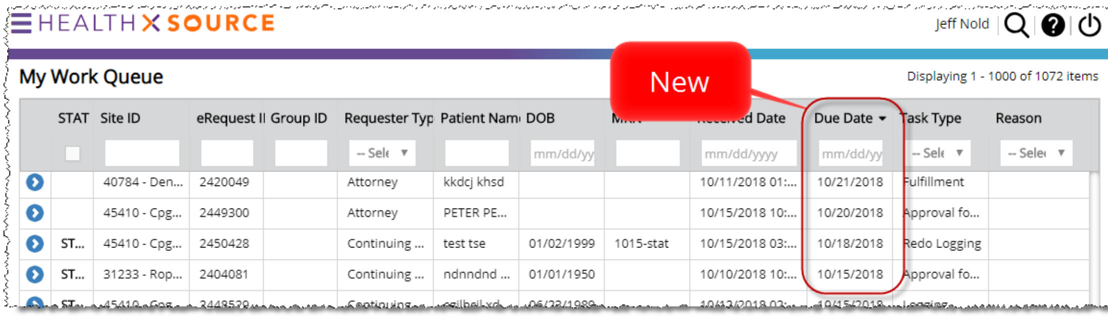
   9.1 the **Logger** does not enter a value in the field;

   9.2 the request moves from **Logging** to **Fulfillment**.

Where can you see Due Date information?

My Work Queue

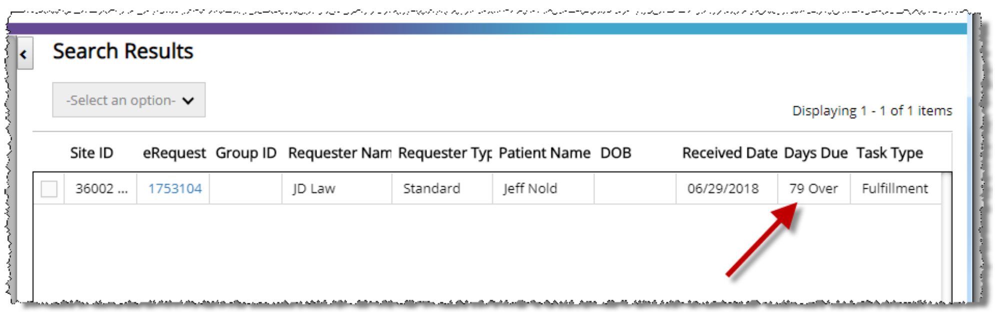
My Work Queue now includes a **Due Date** column.



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

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.

My Holds

Not yet available.

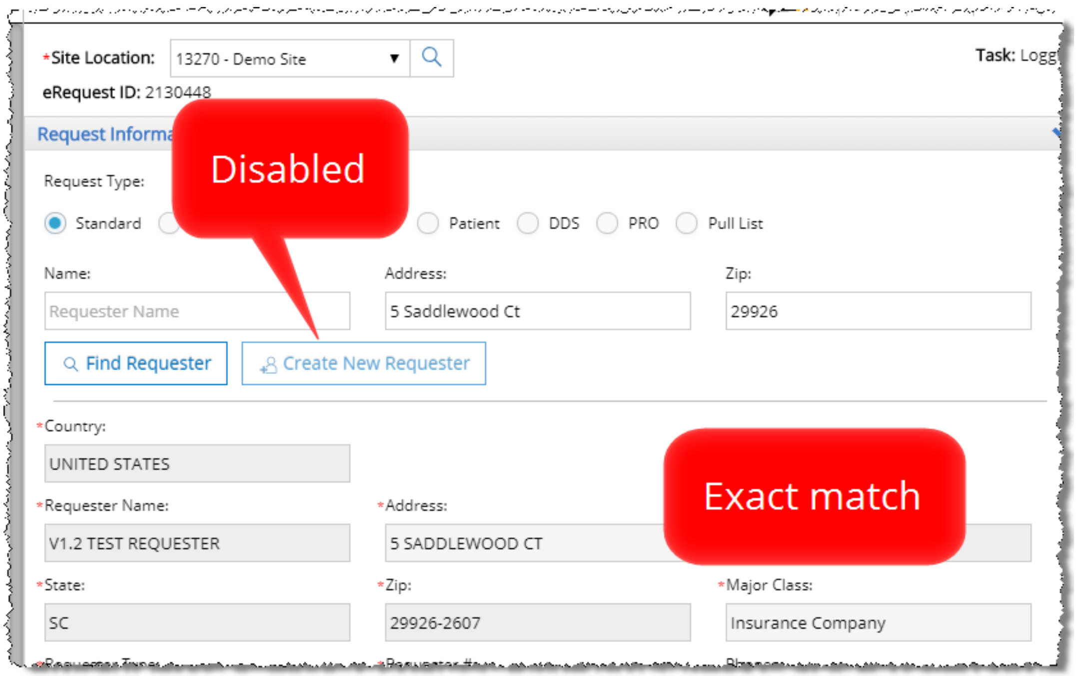
Request Details Report

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**.



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.