



# HealthSource

## 5.11 Release Notes

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## Default to Request Letter in Fulfillment

### Previous Behavior

When the Request is in a fulfillment state, the view defaults to the Medical Record section which results in users manually selecting the Request Letter section to review the request.

### New Behavior

When the Request is in a fulfillment state, the Request Letter will automatically display as the default view when the request is opened.

## Invoice Type Selection removed

Every request logged in HealthSource should utilize the *Reason for Request* option. Each Reason for Request has an Invoice Type associated with it for appropriate pricing. The *Invoice Type* option was found to be redundant and has been removed from all screens.

If you have questions about which *Reason for Request* to use, please refer to the [Invoice Types list](#) at the bottom of this document or ask your manager.

• Select an Option:

Reason for Request       Invoice Type

• Primary Reason for Request:

- Select Reason For Request -

## Notice of Delay Correspondence Workflow changes

The Federal Privacy Rule 45 CFR 164.524 (b)(2) mandates we inform the patient that there is a delay in processing their request within 30 calendar days of the Facility Receive Date, and the request must be processed within 60 days of the Facility Receive Date. It is our obligation to advise the patient as to what date they will receive the records. This process is audited and monitored by the Ciox Compliance department.

A Notice of Delay correspondence should be sent to the customer whenever a request is not able to be completed based on Federal and State regulations. Failing to send the Notice of Delay correspondence in a timely manner places Ciox out of Federal and State regulated compliance. To help assist HealthSource users maintain compliance, the following enhancements have been made:

- Notice of Delay request workflow update

- When a Notice of Delay correspondence is sent, the request will no longer go to Delivered status and will remain open in the same workflow state from where the Notice of Delay correspondence was generated (e.g., request will remain in Ready to Fulfill if Notice of Delay correspondence was sent while request was in Ready to Fulfill)
- A “child” request will be automatically generated behind the scenes and the Notice of Delay correspondence letter will be sent to the customer
- Both the original request and the “child” request history events will provide the *eRequestIDs* that link the requests together

Date	User Name	Event Description
03/01/2022 01:58 PM	Kim King 1	Notice of Delay correspondence letter generated for child request (eRequest ID: 3544131).

Date	User Name	Event Description
03/01/2022 01:58 PM	ROI	Request State changed to DATA_ENTRY
03/01/2022 01:58 PM	Kim King 1	Notice of Delay correspondence request (eRequest ID: 3544131) created from parent request (eRequest ID: 3544013).

- In-request reminder notifications when approaching state or federally regulated Notice of Delay deadline
  - When a request is within 5 business days of the deadline to send out a Notice of Delay correspondence letter, the system will display a pop-up window each time the request is opened notifying the user of the deadline date.
  - **NOTE: This popup will continue to display when the deadline has passed.**



- Visual indicator (red highlight) in Search screen denotes the requests that have had a Notice of Delay correspondence sent to the Requester and is therefore now within a 30-day timeframe to

resolve the delay for the request.

STAT	Site ID	eRequest ID	Group ID	Requester Name	Requester Class	Patient Name	DOB	Intake Date	Facility Rcvd Date	Days Due	Request Status
<input type="checkbox"/>	35650 - Co...	3543638		king, kim patient	Patient	kim patient ki...	01/01/2000	02/28/2022 ...	02/28/2022	3	Pending
<input type="checkbox"/>	13558 - M...	3543649		king, patient per...	Patient	patient perso...	01/01/2000	02/28/2022 ...	02/28/2022	3	Ready to Fulfill
<input checked="" type="checkbox"/>	35650 - Co...	3543650		king, kim	Patient	kim king	01/01/2000	02/28/2022 ...	02/28/2022	3	Ready to Fulfill
<input type="checkbox"/>	35650 - Co...	3544118		king, Kim patien...	Patient	Kim patient c...	01/01/2000	02/28/2022 ...	02/28/2022	3	Ready to Fulfill

- Search criteria field added to filter requests that have had a Notice of Delay correspondence sent to manage daily work queue

**Request Progress**

Milestone and Status:

All
 ▼

Status Reason:

All
 ▼

**Request Characteristics**

Type and Requester Class:

All
 ▼

Request Reason:

All
 ▼

Additional Request Details

---

Certification Required:

All
▼

STAT Required:

All
▼

Notice Of Delay:

All
▼

All

Yes

No

Requester Name/Number:

Requester Name or Number
▼

Request Intake Type:

All
 ▼

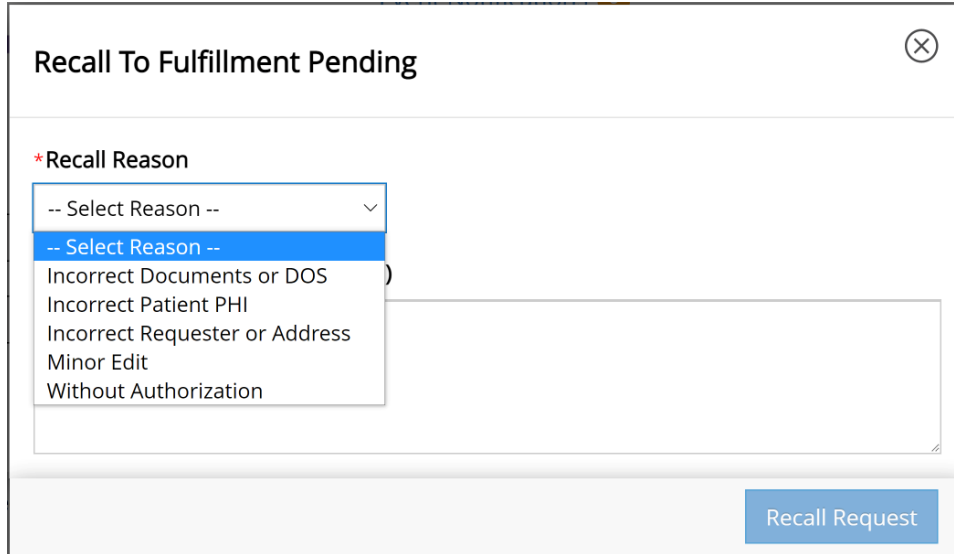
MTQ Hold Period:

All
 ▼

Export

## Recall Pend Reason changes

The Recall Pend Reasons have been revised to match the terminology of the UAD categories. In addition, a new Reason has been added named Minor Edits. The Minor Edit reason is used when the item to correct is not as severe as a UAD reason, however you want to correct the data in the request.

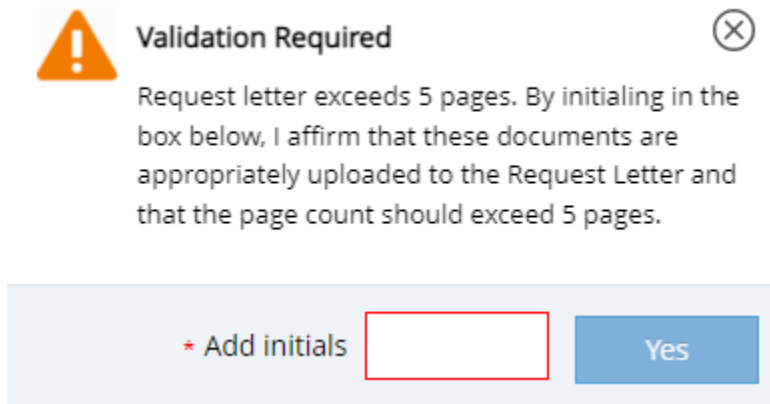


<b>Recall Pend Reasons</b>	<b>Use this when...</b>
Incorrect Documents or DOS	Use this reason when a document or date of service (DOS) has been included that should not have been OR if you failed to attach a document or DOS that should be included
Incorrect Requester or Address	Use this reason when the request may have been disclosed to an incorrect requester or address
Incorrect Patient PHI	Use this reason when the patient records scanned do not match the patient's records being requested
Minor Edit	Use this reason when there is data in a field that you want to change that is minor and does not cause a UAD
Without Authorization	Use this reason when there is no authorization, or the authorization provided does not allow for the attached records to be released. i.e. Any and all records were attached, and authorization permits only a date range, wrong person signed authorization, or required authorization not attached

## Request Letter Warning

A Warning pop-up window displays when the Request Letter is updated (pages added/removed) to exceed 5 pages.

You should review the Request Letter and authorization documents attached in the Request Letter section for accuracy and affirm it is correct to have more than 5 pages by entering your initials in the pop-up. This will help to reduce UADs.



**Validation Required** ⊗

Request letter exceeds 5 pages. By initialing in the box below, I affirm that these documents are appropriately uploaded to the Request Letter and that the page count should exceed 5 pages.

\* Add initials

## Verify Assist change

Verify Assist (also known as Assisted QC) is a detailed post fulfillment check on medical records. The automated Verify Assist technology compares the Patient's Name and Date of Birth (DOB) entered in HealthSource with the medical records attached. This process takes place after the request has been submitted from fulfillment. The maximum page count for Verify Assist to be used on the medical records has been increased from the current setting of 1,500 to 2,500 pages. This will help find errors and reduce UADs.

## Production Fixes

- Pull List child requests have the correct coversheet instead of the parent's full coversheet.
- Site search lookup finds matches after deselecting sites when greater than 13,000 sites exist.
- With the Internet Explorer (IE) browser, medical records load instead of receiving an error when in read-only mode.



## Reference: Invoice Types

Invoice Type	Request Type	Primary Reason	Secondary Reason	Special Processing Reasons - Available in Fulfillment
1	Attorney	Subpoena	Subpoena	
1	Government	Subpoena		
2	Insurance	Workers Comp	Standard Workers Comp	
2	Attorney	Workers Comp	Workers Comp	
3	Government	State DDS		
4	Government	Social Security/Disability	Social Security Application	
4	Attorney	Social Security/Disability	Social Security Claim/Application	
5	Facility	Business Office Copy /Risk Management		
6	Patient	Patient Personal		
7	Attorney	Attorney	Personal Injury	
10	Patient	Patient Transfer		
11	Attorney	2nd Request		
11	Insurance	Insurance	2nd Request Insurance	
11	Patient	2nd Request Not Work Comp	2nd Request Not Work Comp	
12	Insurance	Utilization Review		
12	PAYI	Utilization Review		
14	Government	Workers Comp Board		
16	Attorney	Court Issued	Court Issued	
16	Attorney	Court Issued	Court Issued	
17	Government	Agency	OMAP	
18	Insurance	Workers Comp	2nd Request Workers Comp	
18	Attorney	Attorney	Workers Comp 2nd Request	
19	Government	Agency	Dept Of Health Human Services	
20	Attorney	Workers Comp	Workers Comp Subpoena	
22	Attorney	Attorney	Defense Attorney	
23	Attorney	Attorney	Defense Subpoena	
23	Attorney	Attorney	Defense Subpoena	
24	Insurance	Disability	Short Term/Long Term Claim	
24	Insurance	Insurance	Standard Insurance Claim Payment	
24	PAYI	Standard Insurance Claim Payment		
25	Attorney	Attorney	<b>Choose appropriate secondary reason</b>	Radiology Physical (Silver) Films
25	Continuing Care	Continuing Care		Radiology Physical (Silver) Films
25	Hospital	Hospital		Radiology Physical (Silver) Films
25	Insurance	Insurance		Radiology Physical (Silver) Films
25	Patient	Patient		Radiology Physical (Silver) Films
26	Facility	Special Project		
27	Insurance	Insurance	Underwriting	
29	Insurance	Insurance	BC BS Claim	
30	Attorney	Attorney	Hospital Lien	
30	Attorney	Attorney	Hospital Lien	
30	Insurance	Insurance		
31	Government	Agency	Voc Rehab	
32	Government	Agency	MI Family	
35	Insurance	Medicare/Medicaid	Medicare Medicaid Utl Review	
35	Government	Government Audit	Utilization Review Medicare & Medicaid	
36	Attorney	Attorney	<b>Choose appropriate secondary reason</b>	Special Rate
36	Insurance	Insurance		Special Rate
36	Patient	Patient		Special Rate
39	Insurance	Audit of Claims	HEDIS Audit	
39	PAYI	HEDIS Audit		
40	Government	Dept of Welfare	Dept of Welfare	
41	Government	Agency	County	
42	Government	Agency	Family and Child	
47	Government	Attorney	State Attorney	
47	Attorney	Attorney	State Attorney Office	
47	Attorney	Attorney	State Attorney Office	
48	Government	Attorney	Attorney General	
49	Government	Agency	Probation	

Invoice Type	Request Type	Primary Reason	Secondary Reason	Special Processing Reasons - Available in Fulfillment
50	Insurance	MRA-Medicare Risk Adjustment	MRA-Medicare Risk Adjustment	
50	PAYI	MRA-Medicare Risk Adjustment		
51	Attorney	Subpoena	Criminal	
52	Continuing Care	Continuity of Care		
52	Continuing Care	Continuity of Care		
52	Hospital	Continuity of Care		
53	Government	Veterans Affairs		
53	Attorney	Veterans Disability		
54	Hospital	Hospice	Hospice	
55	Attorney	Social Security Appeal	Social Security Appeal	
55	Attorney	Social Security Appeal	Social Security Appeal	
56	Government	NC Prison	NC Prison	
57	Government	Public Schools	Public Schools	
58	Attorney	Attorney		
63	Attorney	Attorney	<b>Choose appropriate secondary reason</b>	Itemized Billing
63	Insurance	Insurance		Itemized Billing
65	Attorney	Subpoena	Subpoena	
66	Attorney	Workers Comp	Workers Comp	
67	Attorney	2nd Request	2nd Request	
68	Attorney	Attorney	Personal Injury	
69	Attorney	Workers Comp 2nd Request	Workers Comp 2nd Request	
70	Attorney	Attorney	Defense Attorney	
70	Attorney	Subpoena	Defense Subpoena	
71	Attorney	Subpoena	Criminal	
72	Attorney	Social Security Claim/Application	Social Security Claim/Application	
73	Attorney	Attorney	Workers Comp Subpoena	
77	Insurance	Insurance	Non Medical Insurance Claim	
80	PRO	Standard Pro		
81	PRO	Pro Medicaid		
85	Insurance	Insurance	RAC Medicare	
89	Government	Non Profit/Non Bill		
91	Attorney	Attorney	Workers Comp Self Insured	
91	Attorney	Attorney	Workers Comp Self Insured	
91	Insurance	Insurance	Workers Comp Self Insured	
93	Government	Government	RAC Medicaid	
93	Insurance	Insurance	RAC Medicaid	
95	Insurance	Insurance		
95	PAYI	DRG/Payment Integrity		
100	Attorney	Attorney	<b>Choose appropriate secondary reason</b>	Radiology Physical (Silver) Films
105	Insurance	HIX-Health Insurance Exchange		
105	PAYI	HIX-Health Insurance Exchange		
106	Insurance	RADV-Risk Adjustment Data Validation		
106	PAYI	RADV-Risk Adjustment Data Validation		
108	Attorney	Patient Directive		
108	Attorney	Patient Directive		
108	Government	Patient Directive		
108	Insurance	Patient Directive		
109	Attorney	Forms Completion by Provider		
109	Attorney	Forms Completion by Provider		
109	Insurance	Forms Completion by Provider		
109	Patient	Forms Completion by Provider		
110	Insurance	Insurance	APS	
112	Attorney	Patient Social Security Appeal		
112	Attorney	Patient Social Security Appeal		
112	Attorney	Patient Social Security Appeal		
112	Attorney	Patient Social Security Appeal		
112	Patient	Patient Social Security Appeal		
113	Attorney	SSA Appeal Representative Form 1696		

Invoice Type	Request Type	Primary Reason	Secondary Reason	Special Processing Reasons - Available in Fulfillment
113	Attorney	SSA Appeal Representative Form 1696		
113	Patient	SSA Appeal Representative Form 1696		
114	Attorney	Attorney	Represent Indigent	
114	Attorney	Attorney	Represent Indigent	
115	Attorney	Attorney	Hospital Per Admission	
115	Attorney	Attorney	Hospital Per Admission	
116	Government	Clinical Research		
116	Insurance	Clinical Research		
117	Attorney	Attorney	Subpoena 2nd Request	
118	Attorney	Attorney	Social Security Claim/Appeal 2nd	
118	Attorney	Attorney	SSI Claim 2nd Request	
121	Insurance	Insurance	Pharmacy	
122	Attorney	Attorney	<b>Choose appropriate secondary reason</b>	X-Ray Workers Comp
122	Insurance	Insurance		X-Ray Workers Comp
123	Government	Attorney	Federal Public Defender	
125	Attorney	Attorney	Disability Gov Benefits	
125	Attorney	Attorney	Disability Gov Benefits	
125	Government	Attorney	Disability Gov Benefits	
125	Patient	Patient	Disability Gov Benefits	
127	Attorney	Attorney	Subpoena 2nd Request	
128	Attorney	Attorney	Social Security Claim/Appeal 2nd	
128	Attorney	Attorney	SSI Claim 2nd Request	
129	Insurance	Insurance	Medicare Medicaid Eligibility	
130	Insurance	Revenue Cycle Management		
131	Attorney	Attorney	<b>Choose appropriate secondary reason</b>	Itemized Billing
131	Attorney	Attorney		Radiology Physical (Silver) Films
131	Attorney	Attorney		Special Rate
131	Attorney	Attorney		Subpoena-deposition/trial testimony with records
201	Attorney	Attorney	<b>Choose appropriate secondary reason</b>	Radiology Digital Images on CD/DVD/Flash Drive
201	Government	Government		Radiology Digital Images on CD/DVD/Flash Drive
201	Insurance	Insurance		Radiology Digital Images on CD/DVD/Flash Drive
207	Attorney	Attorney	Attorney REP PAT	
300	PAYD	ACA HIX-Health Insurance Exchange		
300	PAYD	Ciox Audit		
300	PAYD	CIOX Real-World Data Team Request		
300	PAYD	Claim		
300	PAYD	DRG		
300	PAYD	General Attorney		
300	PAYD	General Attorney Subpoena		
300	PAYD	HEDIS Audit		
300	PAYD	MRA-Medicare Risk Adjustment		
300	PAYD	RADV-Risk Adjustment Data Validation		
300	PAYD	SSA Appeal		
300	PAYD	Underwriting		
300	PAYD	Workers Comp		
300	PAYD	Workers Comp Subpoena		
766	Attorney	Requested by Attorney	Requested by Attorney	
766	Attorney	Requested by Attorney	Requested by Attorney	
866	Attorney	Requested by Patient	Requested by Patient	
866	Attorney	Requested by Patient	Requested by Patient	