



## HEALTH SOURCE

### 8.17 Release Notes

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## New History Event for New Requester

A new History event has been created to show Users that a brand-new Requester was created by the Requester Support Team. The event includes the Requester ID.

08/17/2023 04:23 AM	Newrequester Manual	New Requester created and certified by Ciox Requester team. Requester ID: 2455052
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## New 'Unassigned' option for Requester Support

A new option has been added to the Search Requests screen, mainly for the Requester Support team, to filter for requests that have been sent to them with "Unknown" as the Requester Type.

Request Characteristics  
Type and Requester Class:

All

Standard
 

- Attorney
- Datavant
- Facility
- Government
- Insurance
- PAYD
- PAYI
- PRO
- Unassigned

Request Characteristics  
Type and Requester Class:

All

Pull List
 

- Attorney
- Facility
- Government
- Insurance
- PAYD
- PAYI
- PRO
- Unassigned



As a reminder, Loggers and Fulfillers must select a Requester Type, or Unknown when the User doesn't know the type, before sending to Requester Support (see screen below).

Unable to find the requester you are looking for? **Select a Type or 'Unknown' before Submitting**

\* Requester Type: - Select a Requester Type -

- Select a Requester Type -
- Attorney
- Government
- Insurance
- PAYI
- PRO
- Unknown



## Datavant Requests New Workflow - Ciox Certified Requester

Currently, requests coming from Datavant present additional address information in the Request Letter that causes confusion with Users as to who the requester actually is and where the records need to be delivered. Healthsource now has the ability to configure the 'Ciox Certified Requester' user interface (like the existing DDS behavior) for requests with electronic intake and electronic delivery based on the Requester Type and Reason for Request.

With this release, HealthSource will configure Datavant requester types with **Life Sciences** reason for request with this new behavior. This implementation is configurable for all Requester Type & Reason for Request combinations to support future use cases. You will only be able to see and edit specific fields in the Requester/Bill To section. The chart directly below lists the field changes, and the Request screen capture shows the changes in red.

Fields displayed	Fields no longer displayed
Ciox Requester ID	Requester Name
Requester Status Email	Address 1 ,2 & 3
Additional Special Notes	City, State, Zip
	Major Class, Requester Type, Phone

The screenshot shows the 'Requester/Bill To' section of the Ciox Requester interface, which is highlighted with a red border. The section is titled 'Approved Requester Name and Address' and includes the following fields:

- Requester/Bill To**
  - Ciox Requester ID: 2041833
  - Requester Status Email: [Empty]
  - Additional Special Notes: [Empty]
- Deliver To**
  - Message from Ciox Requester Support: Please validate Ship To and Attention To
  - Requested By: ECS MMRF ONDEMAND
  - Attention To: AutomatedTest

Other visible fields in the interface include Site Location, Intake: Electronic, Request Status: Ready to Fulfill, eRequest ID: 11502514, Request Type (Standard selected), Priority, Zip, Address, Name, and Ciox Requester ID.

## User Experience & Technical Enhancements

User Type (End-User, Administrator, Technical)	Area	Problem/Error Solution implemented/amended behavior	Reference #
End-User	esMD	Additional Requester, Performant Recovery RAC Region 2 (San Angelo Tx), created	69337
End- User	Patient Name Search	When searching for requests using All Sites, and Patient Name and DOB, regardless of the number of Sites the User has, the response is very slow.  When Users who have less than 1000 Sites assigned to them, a new, quicker query is now applied when using 'All Sites' so the performance will be better. There will be a future item for selecting just one Site.	67936
End-User	Requester Type-Requester Support	A new Requester Class option, Unassigned, has been added to filter Standard and Pull List Requests that have been sent to Requester Support without a bona fide Requester Type.	69334 69274
End-User	Requester Type-Requester Support	After selecting a Requester Type and then attempting to select a Requester, the User cannot select a Requester, so the User must close the window, enter search criteria, and re-open the lookup window and then select the Requester.  The Requester Lookup window now enables the User to select an existing Requester, after a Requester Type was chosen, to send to Requester Support.	69404
Technical	CDR- DRDP	New contract, docClassification, added to enable DRDP to compute the expiration date of documents (MR, Misc, Request letter, etc.)	69453
Technical	Helm chart template	Bulk import and other templates have been updated	69265