CiOX
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HEALTHSOURCE

8.2 Release Notes

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View Requests for Inactive Sites

The ability to view requests and documents for inactive sites has been added to HealthSource. There are various reasons why a site is deactivated including…

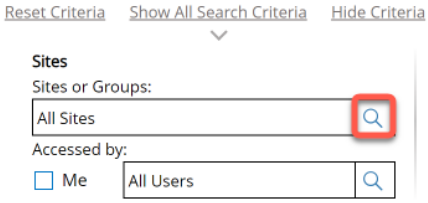
- Facility/Site merge scenarios
- Facility/Site no longer using our services

Feature Highlights

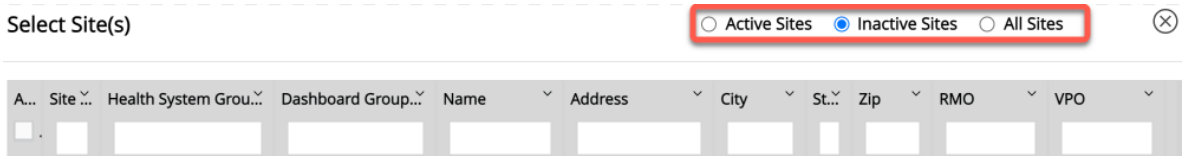
- Inactive Site requests for all request statuses within the last 365 days are available in *view-only* mode
- Site assignment/access per User continues to apply when a site is deactivated
- Rows will be highlighted in purple within the Search results and on the request screen
- Each view-request event for inactive sites is recorded within the Request History
- When documents are downloaded/printed, a generic History event is created.
- Comments can be added to the request

Steps to find an 'inactive'request

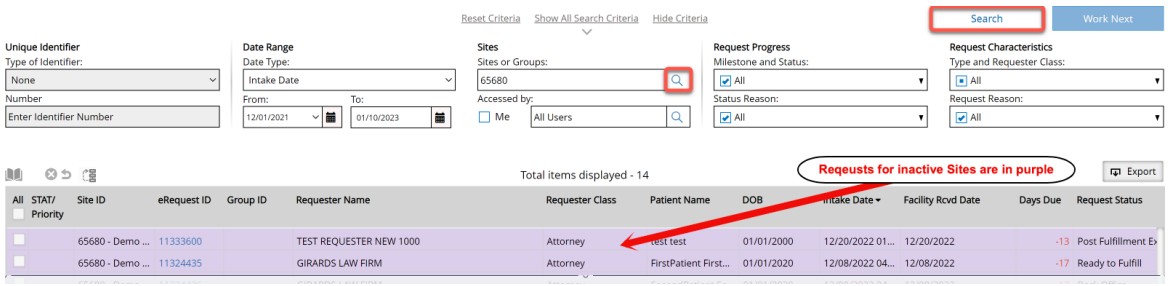
1. Click the Search icon (magnifying glass) on the Request Search screen



2. Click the new *Inactive Sites* radio button in the Site lookup screen



3. Find and select the Inactive Site(s). Then click the Search button on the Search screen to initiate



When you click on an eID, the request opens in view-only mode and while changes cannot be made, comments can be added

Before and After…

Description	Before	After
Request Search screen Site Lookup filter/selection (magnifying glass)	Only active sites were available to be filtered/selected	Inactive, Active, or Both types of sites can be filtered
User must select the inactive Site first to then filter the requests	Could not filter/select inactive Sites	Inactive Sites radio button displays for filter/selection
Search screen, system defaults (All Sites)	Active Sites only	Same, Active Sites only
View/download documents	Only documents for active Sites could be viewed/downloaded	Documents for inactive sites can be viewed/downloaded

Medical Record Automatic Purge (DRDP)

A new feature has been created to enable delivered Medical Records to be purged/removed from their respective request based on the new Document Retention and Document Disposal(DRDP) configuration. Beginning in 2023, Medical Records are being purged for some sites. The new purge process has the following highlights:

- The DRDP team controls which medical records are purged based on several levels
  - Patient Name/DOB, Request ID, Site ID, Customer ID, Employee Number
  - Contractual holds
  - HealthSource default hold is 1 year unless specified as an exception
- Audit History is updated with a purge event
- The medical record is no longer retrievable

When a request is opened that no longer contains the Medical Record because it was purged, a warning message will display when the Medical Record icon is clicked.

The following event displays in History when the medical record has been purged from the system.

User Experience & Technical Enhancements

User Type (End-User, Administrator, Technical)	Area	Problem/Error Solution implemented/amended behavior	Reference #
End-User	Datavant- Life Sciences	User can change the Request Type from Standard to another type and ultimately remove the original Requester/Major Class and add another Requester when intake is electronic User cannot change the Request Type from Standard thereby the Requester cannot be changed for Datavant electronic requests.	66443
End-User	Digital Fulfillment	Additional logic has been added to consider the secondary Reason for Request to determine when a request should be routed to DF. Also, History is updated with the rules evaluation.	64554
End-User	Digital Fulfillment-HCA	Requests are now automatically routed to *Ready to Fulfill* (manual) after 120 hours instead of 48 hours.	66011 66012
End-User	Due Date	Electronic requests sent with a Due Date do not display the Due Date on the screens. Also, there is an erroneous History event, "Not able to derive due date". Electronic Requests received via the API that have a Due Date sent, now display the Due Date and a History Event is no longer created.	65915
End-User	Fulfillment QC	The Internal Management role has been revised to enable the Fulfillment QC permission.	66271
End-User	History	A Record Type event displays for the User who uploads the Request Letter instead of the User who logged the request with the record types and end date An event is no longer logged for the User who only uploads the MR; an event is logged for the User who selects the Record Types and the end date.	66217
End-User	Print2Q – Bulk Fulfillment	The Date Picker is not selecting the month correctly and causes a page refresh in Bulk Fulfillment and goes to the HealthSource main screen. The Date Picker month arrow no longer causes a refresh. It also displays the Dates of Service in the header.	65862
End-User	Requests stuck in Read-Only	When request is stuck in read-only mode causing the inability to upload the Medical Record, the Request	63474

User Type (End-User, Administrator, Technical)	Area	Problem/Error Solution implemented/amended behavior	Reference #
		will automatically be “released” to Ready to Fulfill after 2 hours.	
End-User	Record Gold Set	The Patient Transfer record set record types are now arranged in alphabetical order.	64991
Administrator	Digital Fulfillment – Authorization Validation	The Authorization Validation workflow can now be configured and used for Requester Type, Disability.	65881
Administrator	Fulfillment QC	The Fulfillment QC workflow can now be configured and used for Requester Type, Disability.	65881
Administrator	Provisioning- Bulk	The csv import file process times out when there is a large amount of Users and Sites. The processing of the file is now done with 30 users at a time, then the next 30, etc. to prevent time outs.	63028
Technical	Digital Fulfillment	Components use the Intake Services API instead of the EIP services now.	66352
Technical	Digital Fulfillment	Created new API to upload MR when request is in Fulfillment Pend status to be used internally in special situations.	65919
Technical	EPIC Batch/Prisma	Add Status and Cancel Reason to the Prisma Epic Batch Back File.	65847
Technical	Fulfillment QC	As part of HS 7.0, the threshold for the page count split was set to 2000 and is now revised to 3000 pages in the database to support 2500 pages for Assisted QC.	66658
Technical	Mount path	January 2023 update artifact_tiff_location.	66872
Technical	Record Hub	Increase Request Search results to 5000 from 1000.	66350
Technical	Security	Security changes applied.	66640
Technical	Workload	KEDA rescaling.	65972