HealthSource Clarity

v4.0 Release Notes

July 2021

Document History

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Contact Information

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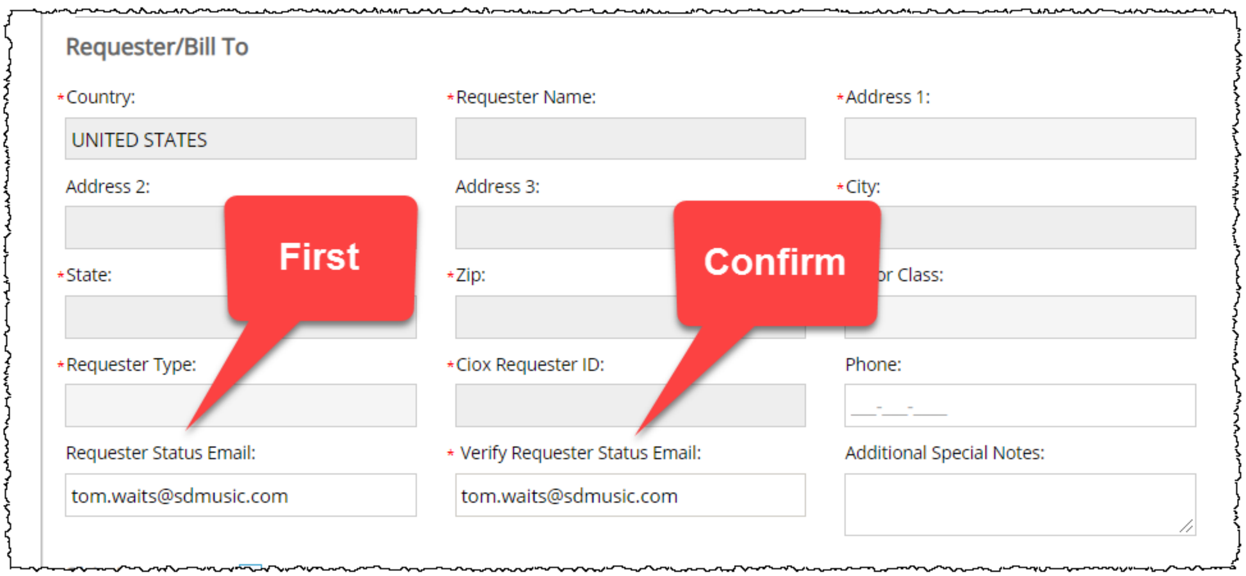
HealthSource Clarity v4.0 Release Notes

See the following sections for detailed information on the changes made in this release.

REQUESTER STATUS UPDATES BY EMAIL

You can now enter an email address at which the requester will receive status messages about the request. By providing automatic updates, we hope to cut down on the volume of "Where are my records?" calls to Customer Support.



After entering the **Requester Status Email**, you must confirm it by typing the same information again. You cannot paste a value into either field.

The value you enter is checked for proper email formatting (value@domain.com, .net, .gov, etc.) We do not check that the email is actually valid.

Availability

The **Requester Status Email** field can be filled out at these points in the workflow:

Request Status	Request Types
• Logging • Fulfillment • New Requester Setup	All

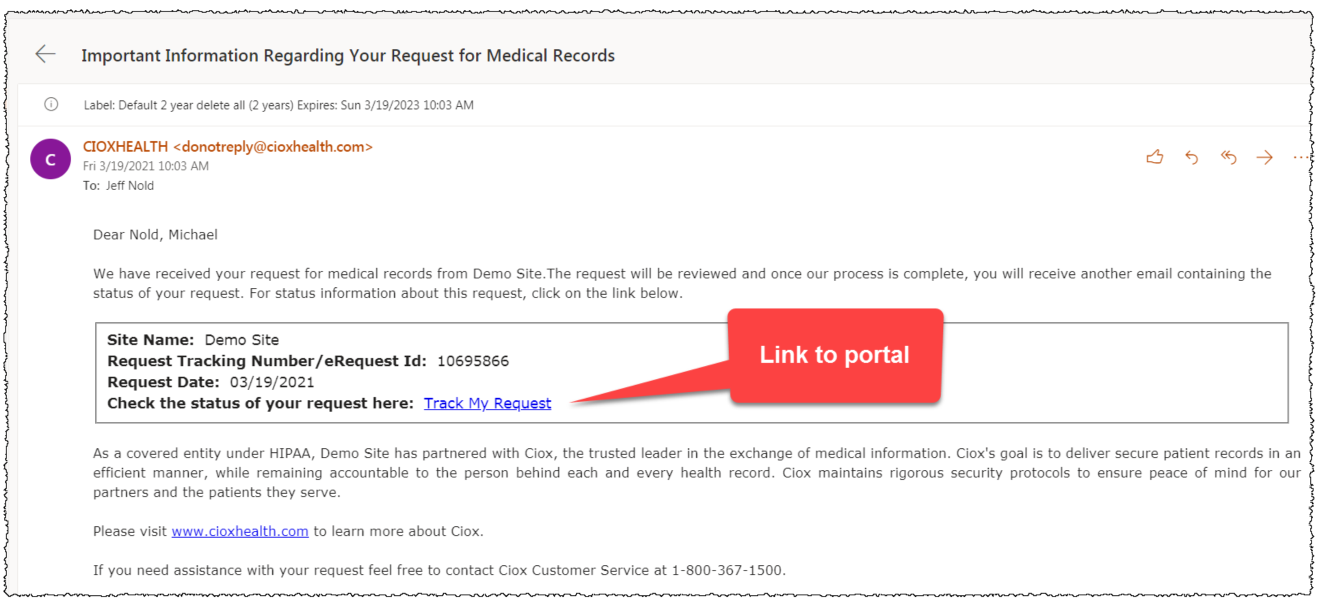
When are email messages sent?

The requester will receive an automatic email at these points:

- after the request is submitted from **Logging**;
- when the request is sent for **Delivery**;
- if **Correspondence** is sent to the requester, which closes the request;
- if the request is **Canceled**.

What does the email show?

All automated status emails use the same subject: *Important Information Regarding Your Request for Medical Records*. They identify the **Site**, **eRequest ID**, and **Request Date**. They also include a link to our new **SmartRequest** portal.


Important Information Regarding Your Request for Medical Records

Label: Default 2 year delete all (2 years) Expires: Sun 3/19/2023 10:03 AM

CIOXHEALTH <donotreply@cioxhealth.com>
Fri 3/19/2021 10:03 AM
To: Jeff Nold

Dear Nold, Michael

We have received your request for medical records from Demo Site.The request will be reviewed and once our process is complete, you will receive another email containing the status of your request. For status information about this request, click on the link below.

Site Name: Demo Site
Request Tracking Number/eRequest Id: 10695866
Request Date: 03/19/2021
Check the status of your request here: Track My Request

As a covered entity under HIPAA, Demo Site has partnered with Ciox, the trusted leader in the exchange of medical information. Ciox's goal is to deliver secure patient records in an efficient manner, while remaining accountable to the person behind each and every health record. Ciox maintains rigorous security protocols to ensure peace of mind for our partners and the patients they serve.

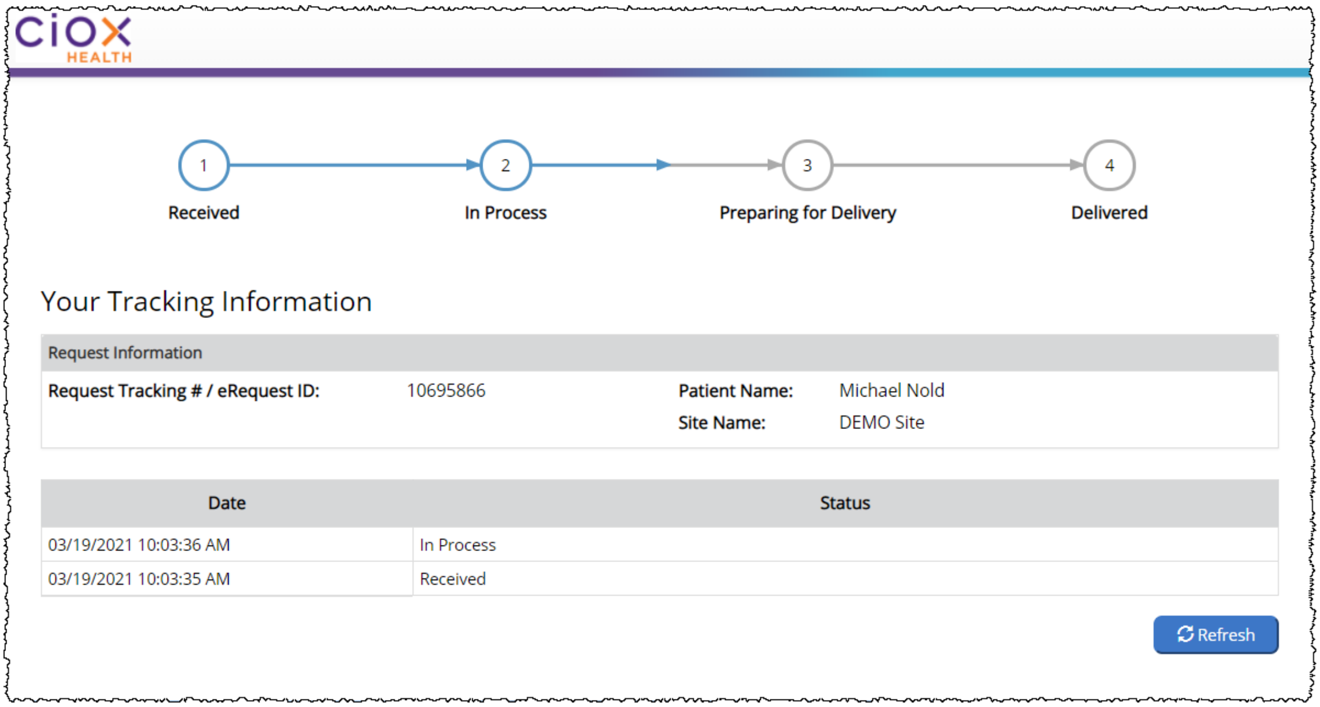
Please visit www.cioxhealth.com to learn more about Ciox.

If you need assistance with your request feel free to contact Ciox Customer Service at 1-800-367-1500.

The portal shows the requester the current and past status of their request. See page 6 for an example of the information shown on the portal.

SmartRequest portal example

The **SmartRequest** portal gives requesters an easy way to understand the current status of their request, without overwhelming them with details.

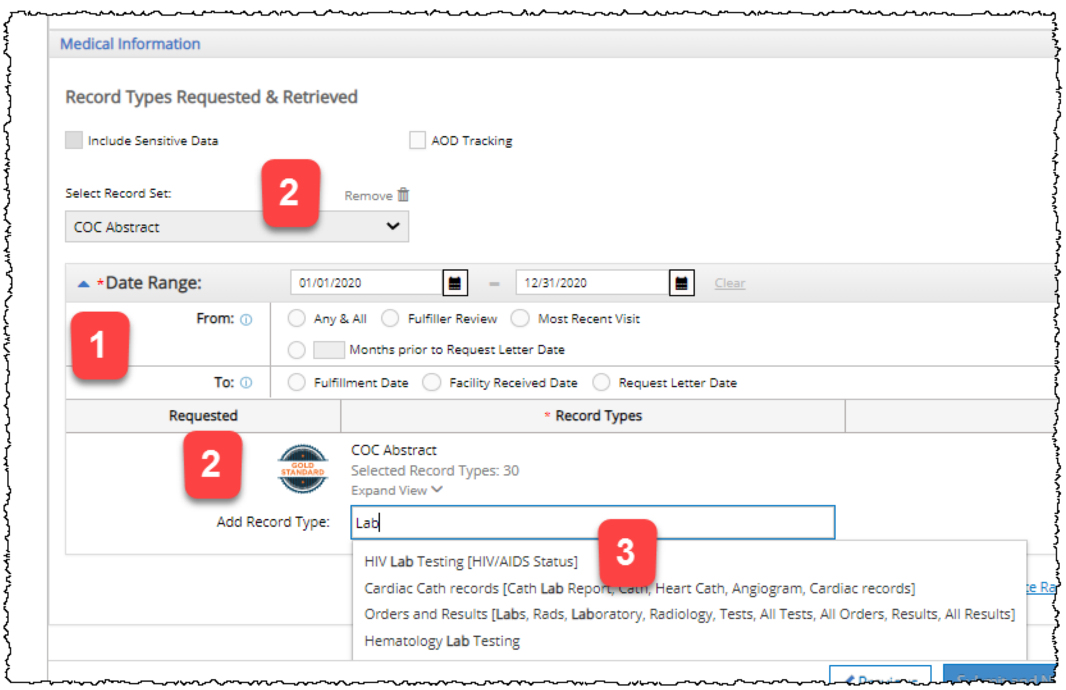


DATE RANGES, RECORD TYPES, AND RECORD SETS

We have made substantial changes to the way that you define the Medical Records to be captured. See the following sections for details:

Overview of Date Range, Record Types, and Record Sets

Date Ranges	• As many as 10 different **Date Range** entries allowed per request; • At least one **Date Range** must be defined during **Logging**; • **From** and **To** dates can be automatically calculated.
Record Types	• You add a **Record Type** to a request during **Logging** by typing a name and selecting the appropriate choice, rather than marking a checkbox; • The **Record Type Library** of predefined **Record Types** now includes more than 80 choices, compared to the 19 available before; • Standard **Record Types** are linked to "aliases" to reduce the need to enter non-standard choices; • You can add a **Record Type** that does not currently exist in the **Record Type Library**, much as you formerly used the **Other Requested Record(s)** option.
Record Sets	Some requesters ask for the same set of Medical Records over and over again. To better handle these requests, we created pre-defined groups of **Record Types** called **Record Sets**, which improve the speed and accuracy of specifying the requested Medical Records.

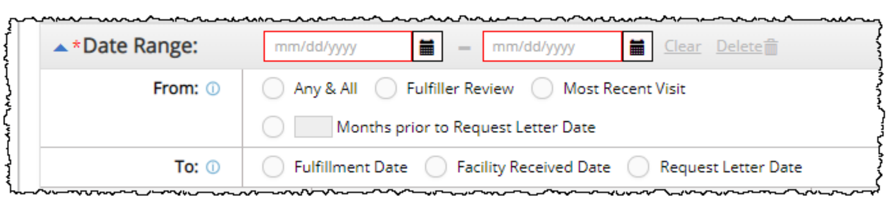


Date Ranges

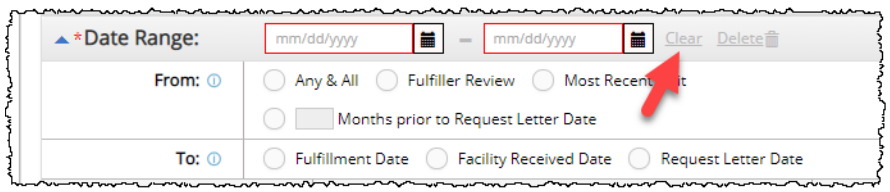
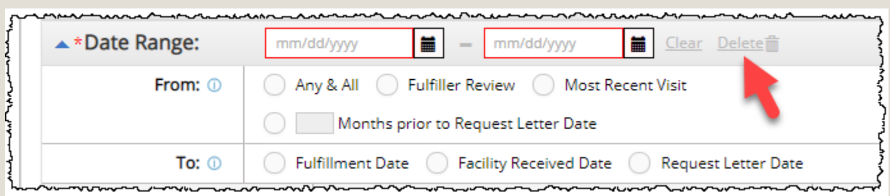
You **MUST** specify at least one **Date Range** before you can submit a request. The rules for acceptable **Date Range** values depend on the **Request Status**:

- **Logging** — “real” **From** and **To** dates or “fuzzy” choices, marked with an asterisk * below.
- **Fulfillment** — real **From** and **To** dates required.

From	
Date field	The “start” date for collecting the requested Medical Records.
Any & All *	All available records should be collected.
Fulfiller Review *	The **From** date cannot be determined by the user during **Logging**. It may be necessary to view the Medical Records to decide the correct date.
Most Recent Visit *	The Request Letter does not specify actual dates. The available Medical Records must be compared to the **Request Letter Date** to decide which records should be retrieved.
Months prior to Request Letter Date	Automatically calculates the **From** date by counting “backwards” from the **Request Letter Date**.
To	
Date field	The “end” date for collecting the requested Medical Records.
Fulfillment Date	Automatically fills the **To** field with the date on which the request is submitted from **Fulfillment**.
Facility Received Date	Automatically fills the **To** field with the **Facility Received Date**.
Request Letter Date	Automatically fills the **To** field with the **Request Letter Date**.



Other Date Range rules

Maximum number	Any request can have as many as 10 distinct **Date Ranges**.
Adding in Fulfillment	You can add a **Date Range** during **Fulfillment** if it was not created in **Logging**.
Clearing dates	The **Clear** link "resets" **Date Range** values to empty. If you have multiple **Date Ranges**, each one has a separate **Clear** link. 
Deleting	You can **Delete** a **Date Range** in **Logging** or **Fulfillment**, as long as one **Date Range** remains. 
Record Sets	If a **Record Set** is associated with the first **Date Range**, that set will also be associated with any additional **Date Ranges** for the request. You can add **Record Types** that are not in the **Record Set** to any of the **Date Ranges**. See page 16 for more information on **Record Sets**.
Pull Lists	The new **Date Range** fields do **NOT** appear when you log a **Pull List**. Dates of Service (**DOS**) are defined for each patient on the **Pull List** screen, which appears as part of the logging process. You can add **Date Ranges** to a **Pull List** "child" request during **Fulfillment**.

Date Ranges for existing requests

We will automatically handle requests created but not submitted before v4.0.

Request Status	Dates of Service present in the existing request?	Date Range after v4.0
Logging	No	**From** and **To** fields will be empty. You must choose one of the **Date Range** options (page 9) before you can submit the request.
	Yes	**Dates of Service** values will carry over to the **From** and **To** fields, so the request will include one **Date Range**. You can add more **Date Ranges** if needed.
Fulfillment	No	**Fulfiller Review** will be selected. You must enter at least one **From** and **To** range before you can submit the request.
	Yes	**Dates of Service** values will carry over to the **From** and **To** fields, so the request will include one **Date Range**. You can add more **Date Ranges** if needed.
Awaiting Fulfillment Approval	No	**From** and **To** fields will be empty. You must choose one of the **Date Range** options (page 9) before you can submit the request.
	Yes	**Dates of Service** values will carry over to the **From** and **To** fields, so the request will include one **Date Range**. You can add more **Date Ranges** if needed before submitting the request.
Awaiting Certification	No	**Fulfiller Review** will be selected. You must enter at least one **From** and **To** range before you can submit the request.
	Yes	**Dates of Service** values will carry over to the **From** and **To** fields, so the request will include one **Date Range**. You can add more **Date Ranges** if needed.

Viewing multiple Date Ranges in Fulfillment

IF

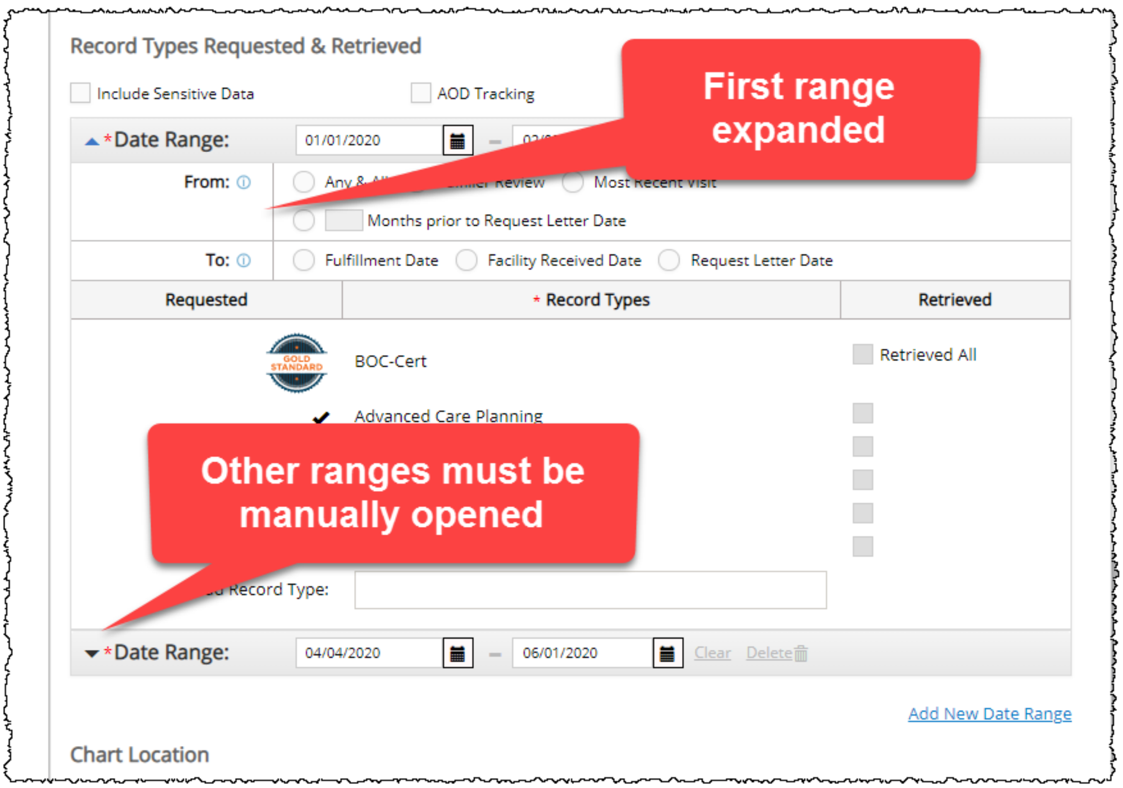
you open a request for **Fulfillment** that includes more than one **Date Range**;

ONLY

the first **Date Range** will be expanded so you can see the **Record Types** and **Record Sets** for that period of time;

BUT

you must open any other **Date Ranges** manually by clicking the arrow.



Record Type Library

This table lists the standard **Record Types** that will be available after the v4.0 release.

Abstract	Colonoscopy	HCFA	Patient Communication	Surgical Information
Admission Report	Consults	History and Physical	Patient Instructions	Telemedicine Notes
Advanced Care Planning	CT Scan	HIV Lab Testing	PET Scan	Telephone Encounter
After Visit Summary	Demographic	Immunization Record	Physical Imaging Films	Toxicology Reports
Allergies	Discharge Instructions	Implant Record	Physical Therapy Rehab Documents	Transfer Report
Ambulance Report	Discharge Summary	Infusion Record	Physician Orders	Transfusion Report
Anesthesia Report	ECG	Intraoperative Reports	Physician Progress Notes	Treatment Plan
Arteriogram	EEG	Itemized Billing	PostOp	UB-04
Assessment & Plan Note	EKG	Mammography	Problem List	Ultrasound
Audiology Report	EKG Tracing	Medication Information	Psychology Evaluations	Vitals (BMI, BP, O2)
Audiology Tracing	ED Records	Medication Orders	Psychotherapy Notes	Vocation Tests
Behavioral Assessment	EMG	MRI	Pulmonary Function Test	Work/School Excuse
Behavioral Health Treatment	Entire Record	Nuclear Med	Radiation Therapy	
Blood Type	Facesheet	Nursing Notes	Radiology Report	
Bone Density Scan	Fetal Monitor Strips	Occupational Therapy	Scanned Documents	
Cardiac Cath Records	Flowsheets	Operative Report	Sexual Assault Report	
Cardiac Rehab Records	Genetic Testing	Orders and Results	Sleep Studies	
Coding Summary	Growth Chart	Pathology Report	Speech Therapy	

Record Type Alternate Terms

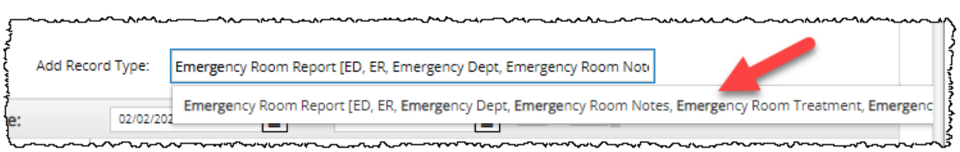
The same **Record Type** may be called different things by different requesters, providers, or facilities.

For example, the standard <u>Admission Report</u> document might be called:

- ED
- ER
- Emergency Dept
- Emergency Room Notes
- Emergency Room Treatment
- Emergency Room Summaries

The new **Record Type Library** includes some of these **Alternate Terms**. You could think of these terms as aliases.

When you add a **Record Type** to a request manually (page 21), possible matches will be found both among the standard name and any **Alternate Terms**. Those aliases are listed in parentheses after the standard name.



Record Types for in-process requests

We will convert **Record Types** for requests created but **NOT** submitted before v4.0:

Old Record Type was	Record Type will automatically change to
Abstract Summary	Abstract
Admission Sheet	Admission Report
Cardiology w/EKG Report	EKG
Consultation	Consults
Continuity of Care Document	Transfer Report
Discharge Summary	Discharge Summary
Emergency Room Report	ED Records
Entire Record	Entire Record
History / Physical Report	History and Physical
Immunization Report	Immunization Record
Itemized Billing Statements	Itemized Billing
Laboratory Report	Orders and Results
Nurse Notes	Nursing Notes
Operative / Procedure Report	Operative Report
Pathology Report	Pathology Report
Physician Orders Report	Physician Orders
Progress Notes	Physician Progress Notes
Radiology Report	Radiology Report
Therapy Notes	Physical Therapy Rehab Documents

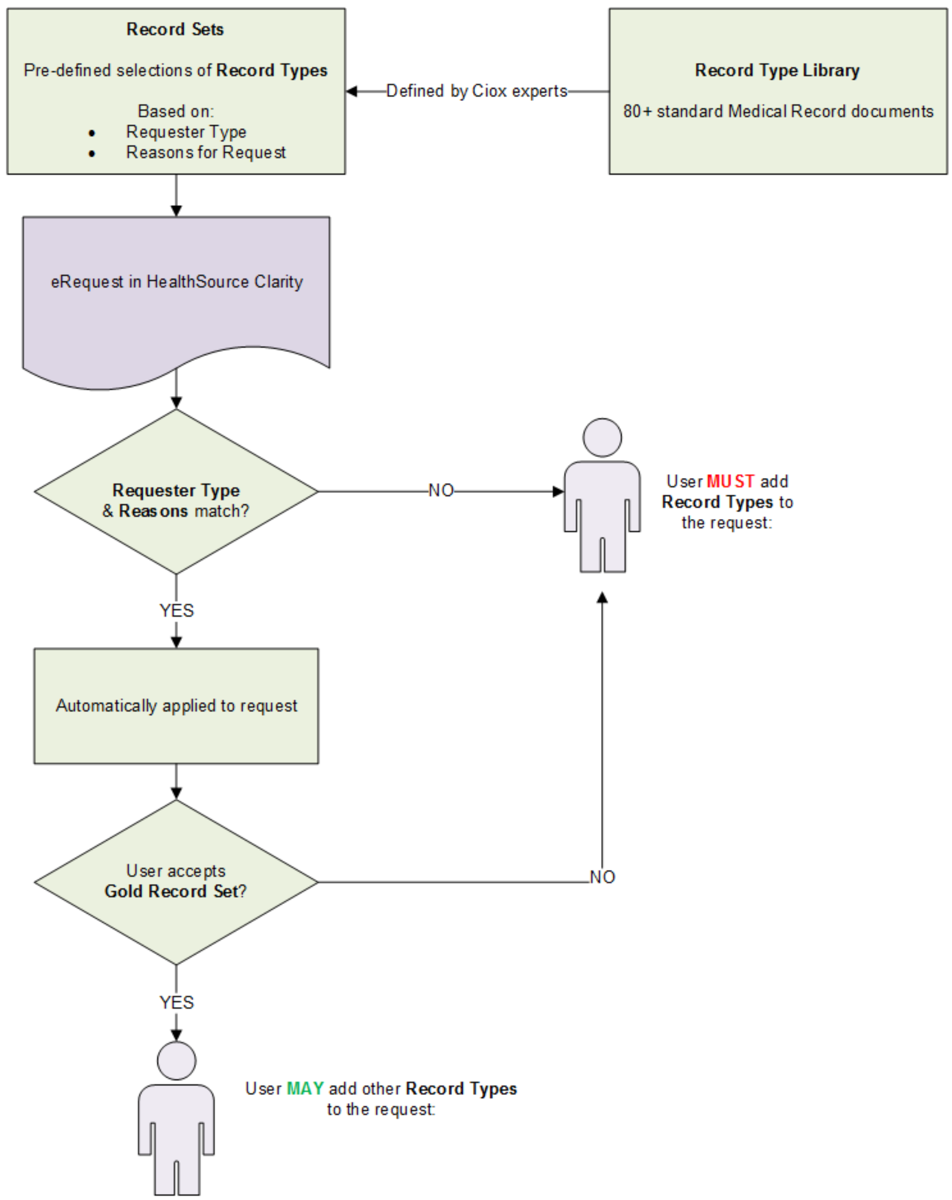
Record Sets

You can think of a **Record Set** as a standard list of **Record Types** that apply to requests with specific combinations of **Requester Type** and **Reasons for Request**.

You might think of them as a shortcut for adding "frequently requested documents."

If a **Record Set** is available for a request, it is automatically applied. All the **Record Types** in the set are marked as **Requested**.

You can choose to **Remove** a **Record Set** from a request and add **Record Types** individually.



Record Set Example

This example is simplified, but it helps explain the general process.

1. **Insurance** requesters typically want documents A, B, C, D, and E for Worker's Comp requests.

2. Ciox Health builds a **Record Set** called Worker's Comp that includes A, B, C, D, and E. It is configured to be available when:

    2.1 **Requester Type** = Insurance;

    2.2 **Primary Reason for Request** = Worker's Comp;

    2.3 **Secondary Reason for Request** = Standard Worker's Comp.

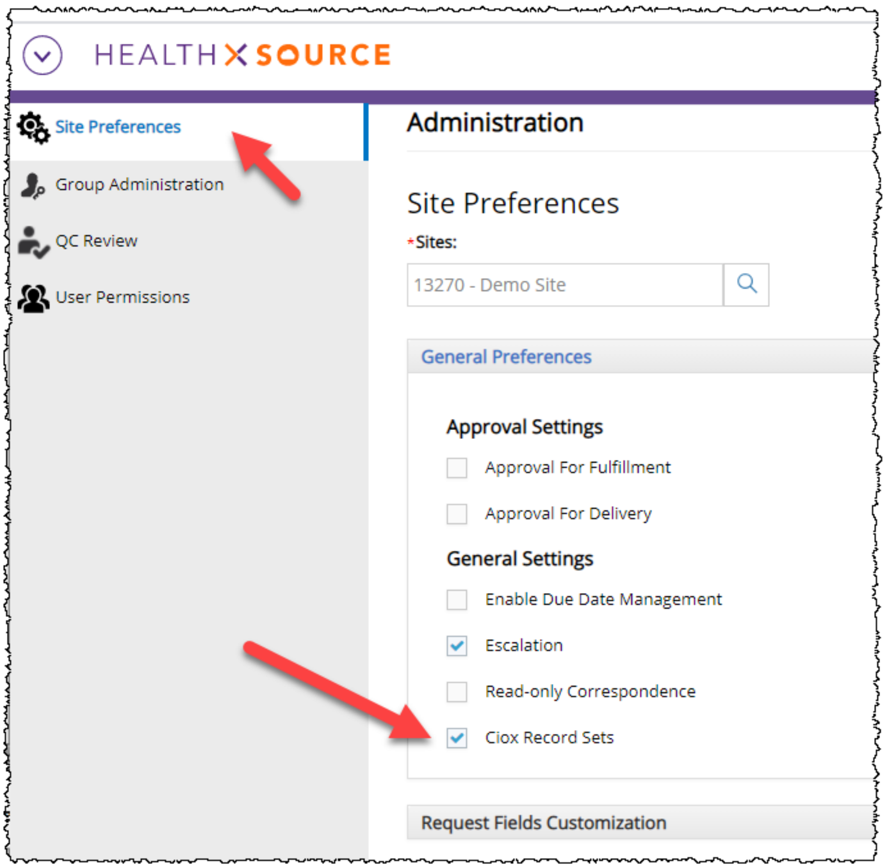
3. You log an **Insurance** request with Worker's Comp / Standard Worker's Comp as the **Reasons**.

4. The **Record Set** called Worker's Comp is automatically available for the request.

5. A, B, C, D, and E are listed in the **Record Types** section of the **Request** screen.

Record Set configuration

Group Administrators decide if individual sites will use **Record Sets** or not. This setting is available on the **User Management — Site Preferences — General Preferences** screen.



By default, all sites will use **Record Sets** initially.

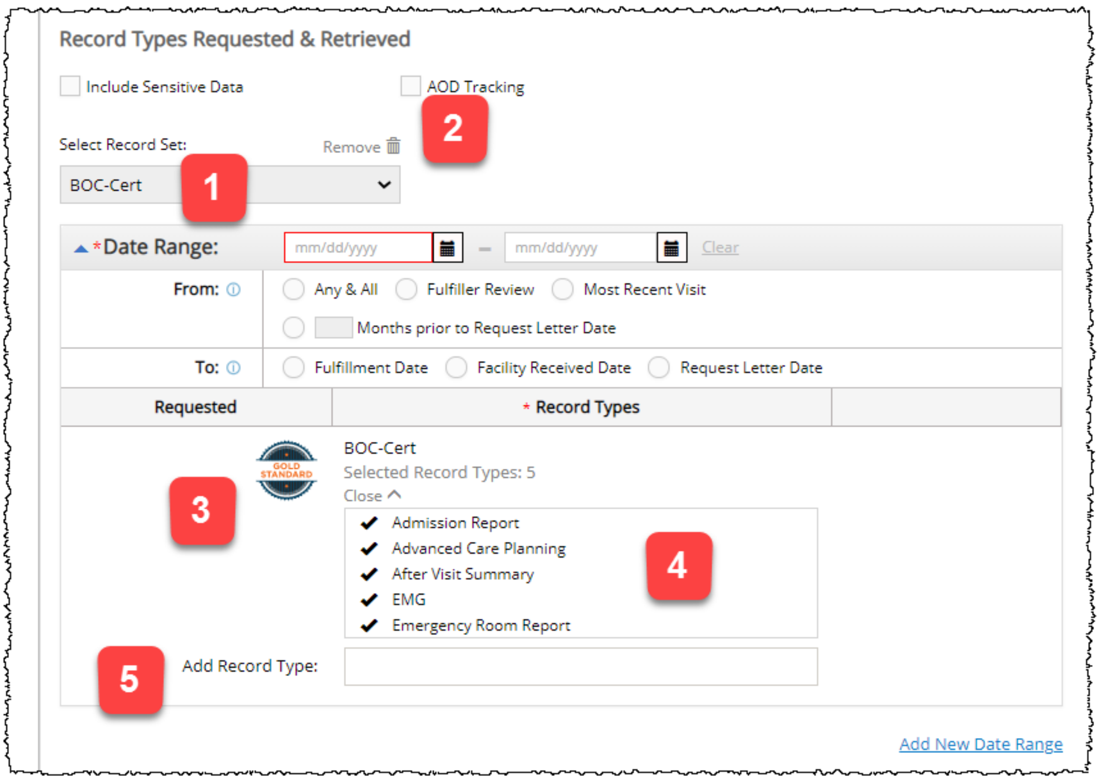
Record Sets are defined by Ciox experts in the **Platform Admin** application, not in **HealthSource Clarity**.

Adding Record Types to a request

There are two ways to specify the **Record Types** that a requester has asked for:

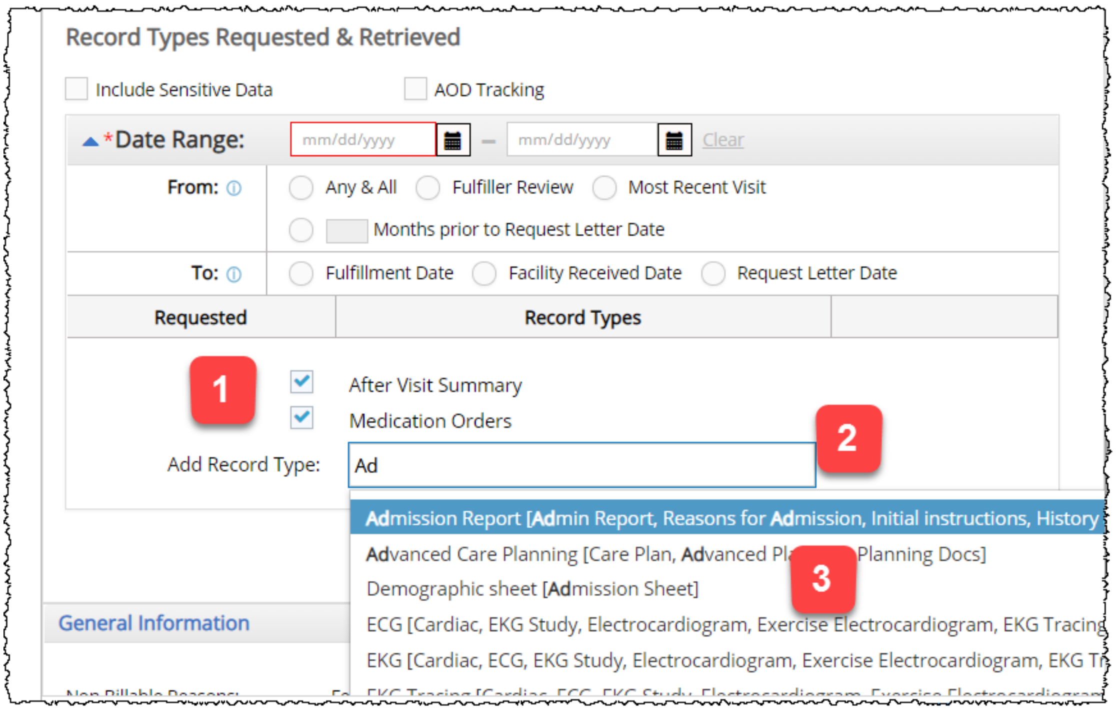
Method	Prerequisite	Can Record Types be marked as not requested?
Accept a **Record Set**	Set availability "triggered" by the **Requester Type** and **Reasons for Request**.	Not individually. You can **Remove** the entire **Record Set** from all the **Date Ranges**. The decision to do so is tracked in the **Request History**. You cannot de-select (clear) individual **Record Types** in the set.
Choose **Record Types** individually	Always available, even if you already accepted / applied a **Record Set**. You will be warned if you add **Record Types** when a **Record Set** has been applied, but you can still go ahead.	Yes. If you add a **Record Type** and then decide it is not appropriate, you can de-select (clear) the checkbox. The document will still appear on the **Request** screen but is not a requested document.

Record Set example



1	**Record Sets** are automatically applied to requests, based on **Requester Type** and **Reasons**. In the rare event that multiple **Record Sets** are valid, they are applied in alphabetical order.
2	The **Remove** command strips the **Record Set** from all **Date Ranges** in the request.
3	**Record Set** symbol and the name of the set (COC Abstract).
4	List of the **Record Types** in the set. They are already marked with black checkmarks indicating that they have been requested. By default this list is not displayed, but it is open in this example, as shown by the **Close** command.
5	You can manually add **Record Types** to a request (page 21) that already uses a **Record Set**. These added **Record Types** are specific to the request — they do not become "part" of the **Record Set** for future requests.

Choose Record Types individually example



1	**Record Types** that have already been manually added. Any **Record Types** you add are automatically checked as **Requested**. If you clear the **Requested** checkbox, the document is still listed, but won't actually be part of the request.
2	Type the name of the **Record Type** here.
3	Possible matches to your text are listed here. Matches are based on **Record Type** names and aliases that **INCLUDE** your text, not only those that **START** with your text. In the example above, several names and aliases are listed because they include the characters AD in that order. If there are no matches, press ENTER to add the **Record Type** anyway. This process is basically the same as the old **Other Requested Record(s)** field. We encourage you to choose items from the **Record Type Library** whenever possible.

Changing Record Types in Fulfillment

No matter what **Record Sets** or **Record Types** were applied to a request during **Logging**, they can be changed during **Fulfillment**.

- To totally remove the "logged" **Record Set**, change the **Requester Type** and / or **Reasons for Request**. You may need to change the **Request Type** in order to clear the requester information. Depending on your new choices, you may be able to apply a different **Record Set**.

- To add more **Record Types**, type in the **Add Record Type** field, just as you would during **Logging** (page 21).

Frequently Asked Questions

Check the following answers to commonly asked questions about **Date Ranges**, R**ecord Types**, and **Record Sets**:

- How many Date Ranges can a single request have?
- Can I use the same dates for more than one Date Range on the same request?
- Who manages the Record Type Library and Record Sets?
- What if none of the Record Type choices match what the Request Letter asks for?
- Do Record Types that I add to a request become part of the Record Type Library?
- What are the Record Type names in parentheses?
- How many Record Sets are there?
- Can I use different Record Sets in the same request?

How many Date Ranges can a single request have?

10.

Can I use the same dates for more than one Date Range on the same request?

No.

You cannot use the same **From** and **To** dates for more than one **Date Range**.

Who manages the Record Type Library and Record Sets?

The **Record Type Library** and **Record Sets** are configured by Ciox experts in the **Platform Admin** application, not through **HealthSource Clarity**.

What if none of the Record Type choices match what the Request Letter asks for?

You can add a document that is not part of the **Record Type Library** to a request, like you did previously with the **Other Requested Record(s)** option. You can do this even if the request is associated with a **Record Set**.

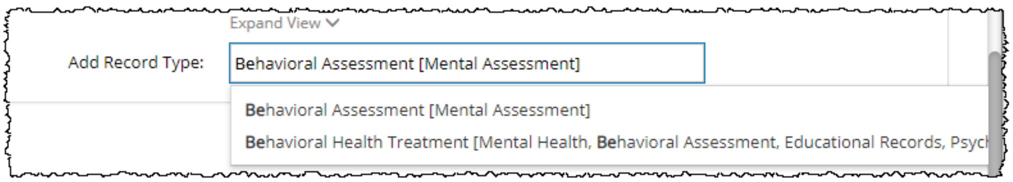
Do Record Types that I add to a request become part of the Record Type Library?

No.

Adding an "other" **Record Type** does **NOT** update the library. Tell your manager any suggestions you have about the standardized choices in the library.

What are the Record Type names in parentheses?

As you type a name in the **Record Type** field, you may notice that there is one "main" name followed by other names in parentheses. In the picture below, Behavioral Assessment is followed by (Mental Assessment).



The names in parentheses are **Alternate Terms** for the main name and they work in both directions — if you typed Mental, you'd see Behavioral Assessment as the top choice.

These **Alternate Terms** keep the number of "official" **Record Types** as low as possible while still letting you choose documents named in the Request Letter.

How many Record Sets are there?

Not all **Requester Types** and **Reasons** are linked to a **Record Set** — in fact, for the initial 4.0 release, we have built only a handful of sets.

Can I use different Record Sets in the same request?

No.

You can only apply one **Record Set** to all the **Date Ranges** in the same request.

If a **Record Set** applies to the first **Date Range**, it also applies to any additional **Date Ranges** in the request.

If you remove a **Record Set**, it is removed from all **Date Ranges** in the request to which it previously applied.

DEFINING WHY RECORDS WERE NOT RETRIEVED

IF

at least one requested **Record Type** is not marked as **Retrieved** in **Fulfillment**;

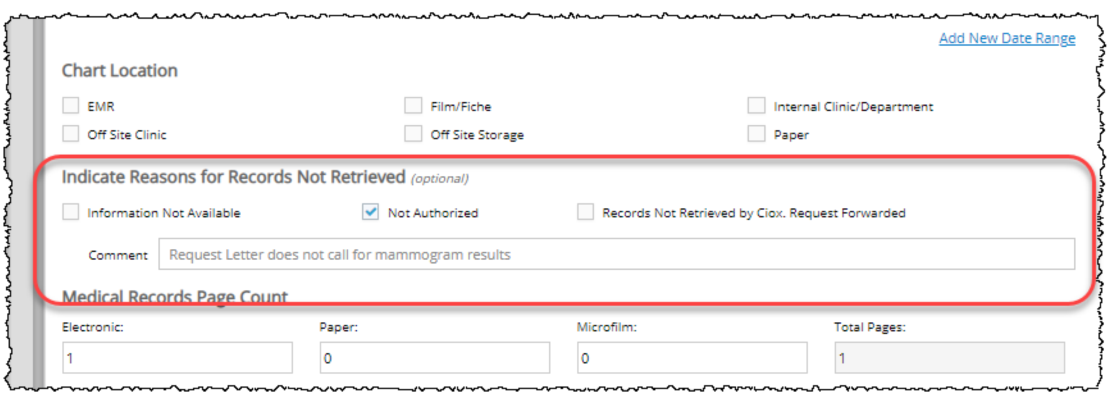
THEN

you can select one or more of the new **Indicate Reasons for Records Not Retrieved** choices:

Information Not Available	Specific requested records could not be found.
Not Authorized	Request Letter does not provide enough authorization.
Records Not Retrieved by Ciox. Request Forwarded	Ciox does not service the location / provider at which the records are located.

AND

You can also provide a **Comment** with detailed information.



You are not technically required to select one of these choices when one or more **Record Types** was not **Retrieved**. If at least one **Record Type** is retrieved, you can **Submit** the request from **Fulfillment**.

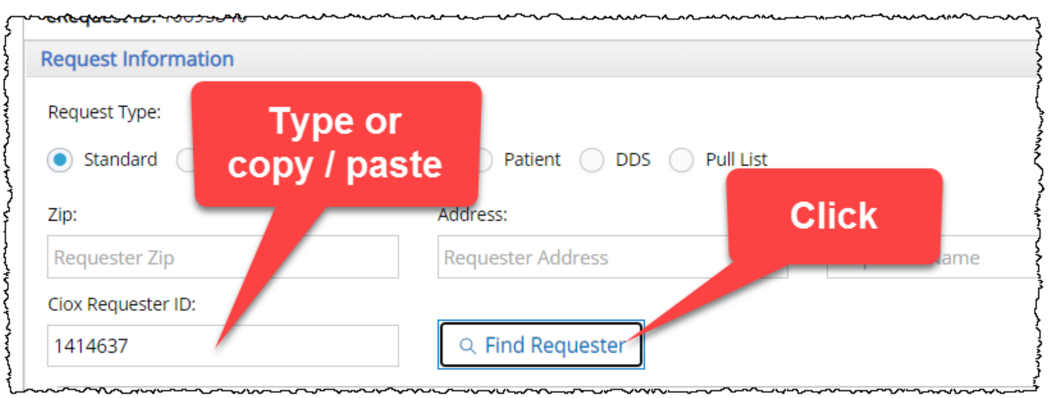
Other updated fields on the Request screen

- New Ciox Requester ID search field on page 28
- Changes to Delivery Method section and process on page 29
- New Request Dates section on page 33
- New Due Date section on page 34
- Renamed, deleted, and moved data entry fields on page 35

New Ciox Requester ID search field

If you already know the **Requester ID** value, you no longer need to search by the **Zip** + **Address** or **Name**. Simply type or copy / paste the ID value in the new field, click **Find Requester**, and you'll get either:

- a single match;
- a message stating the requester was not found.



The "old" **Zip** + **Address** or **Name** search method still works. It will often be the only way to locate a requester. The new method is noticeably faster for many high-volume repetitive requesters, since it never shows multiple possible matches.

Full matches only

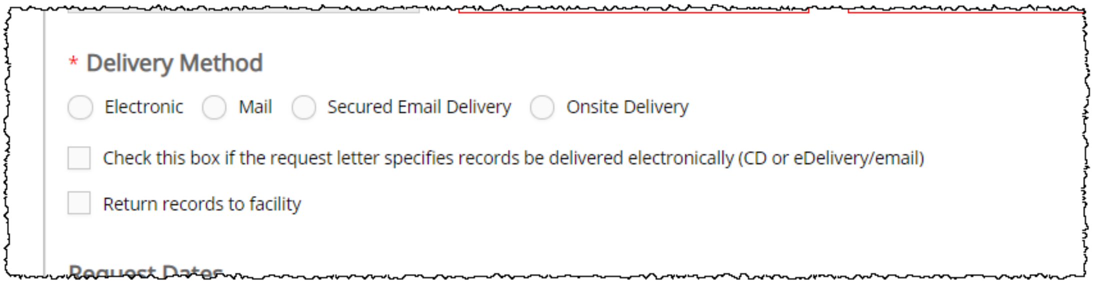
You must enter a complete **Requester ID** value. The new feature does **NOT** look for partial matches. For example, entering 141 would fail, but 1414637 would succeed.

Availability

Request Status	Request Types
• Logging • Fulfillment • New Requester Setup	• Standard • BOC • Pull List

Changes to Delivery Method section and process

The **Delivery Method** choices are now presented as buttons, rather than in a list.



<table>
<tr><th>Default Delivery Method</th><th>Request Type</th><th>Requester Type</th><th>Other Delivery Methods</th></tr>
<tr><td rowspan="5">Electronic</td><td>Standard</td><td>All</td><td>Onsite Delivery</td></tr>
<tr><td>BOC (True BOC)</td><td>Facility</td><td>Onsite Delivery</td></tr>
<tr><td>BOC (Stand Alone)</td><td>Facility</td><td>None</td></tr>
<tr><td>DDS</td><td>Disability</td><td>None</td></tr>
<tr><td>COC</td><td>COC</td><td>None</td></tr>
<tr><td rowspan="5">Mail</td><td>Standard</td><td>All</td><td>Onsite Delivery, Secured Email *</td></tr>
<tr><td>BOC (True BOC)</td><td>Facility</td><td>Onsite Delivery</td></tr>
<tr><td>BOC (Stand Alone)</td><td>Facility</td><td>Onsite Delivery, Secured Email</td></tr>
<tr><td>COC</td><td>COC</td><td>Onsite Delivery, Secured Email *</td></tr>
<tr><td>Patient</td><td>Patient</td><td>Onsite Delivery, Secured Email *</td></tr>
<tr><td>N/A</td><td>Pull List</td><td colspan="2">Inherits the Delivery Methods available for the requester.</td></tr>
</table>

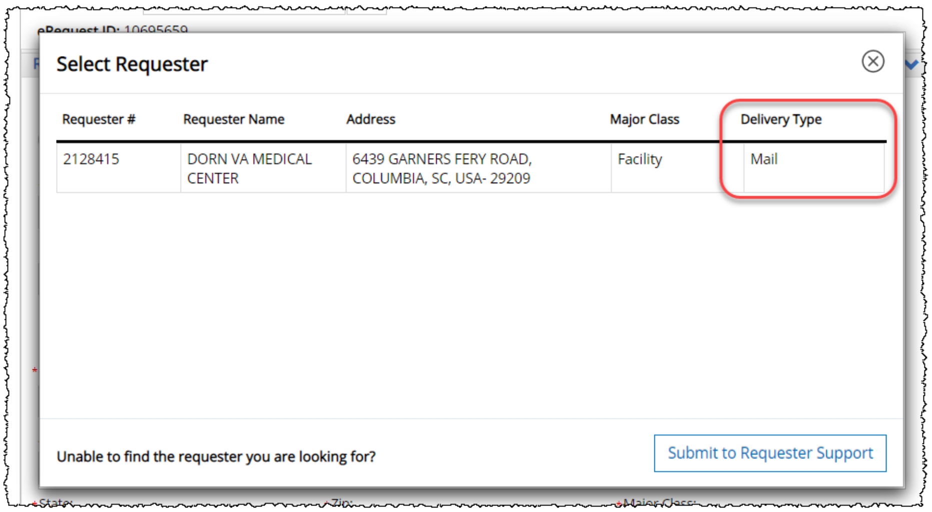
* only if the **Same as Customer Requester / Bill To** checkbox is selected.

Automatic selection of default Delivery Method

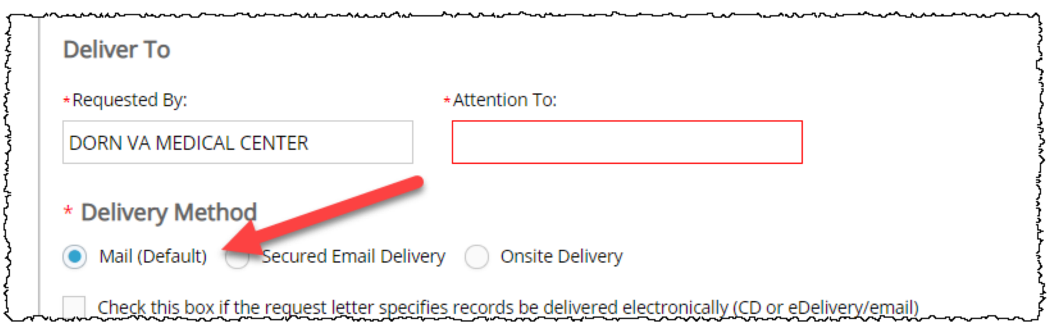
We automatically select the requester's default **Delivery Method** for you. This change eliminates the need to pick a method for every request.

For example:

1. Requester ID 2128415 is configured to receive records by mail.



2. If you select Requester 2128415, the **Delivery Method** = **Mail** automatically.



3. You could "switch" to **Secured Email Delivery** or **Onsite Delivery**. The available choices depend on the **Request Type** and **Requester Type** (page 29).

Secured Email Delivery replaces eDelivery

The former **eDelivery** option, which allowed requesters to retrieve medical records from a portal after receiving login / validation information through email, has been renamed **Secure Email Delivery**.

When you select this option, you must enter a properly formatted email address for the requester and confirm it. You can paste a value into the first field but not the confirmation.

The actual process of delivering these records to the portal, and the retrieval of the records by the requester, has not changed.

See page 29 for information on when the **Secured Email Delivery** option is available.

New Onsite Delivery choice for Patient requests

IF

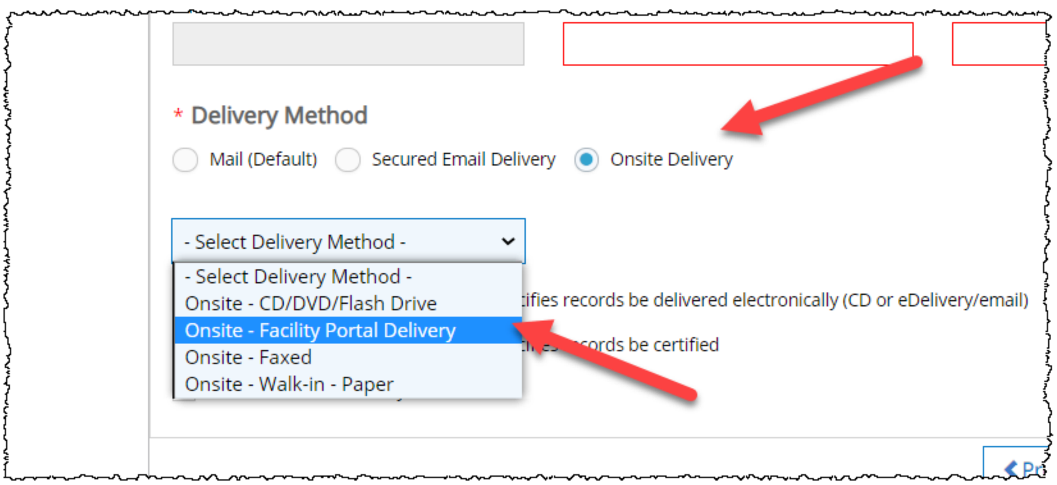
the **Request Type** = **Patient**;

AND

the **Delivery Method** = **Onsite Delivery**;

THEN

you can select a new Facility Portal Delivery option.



Facility Portal Delivery rules

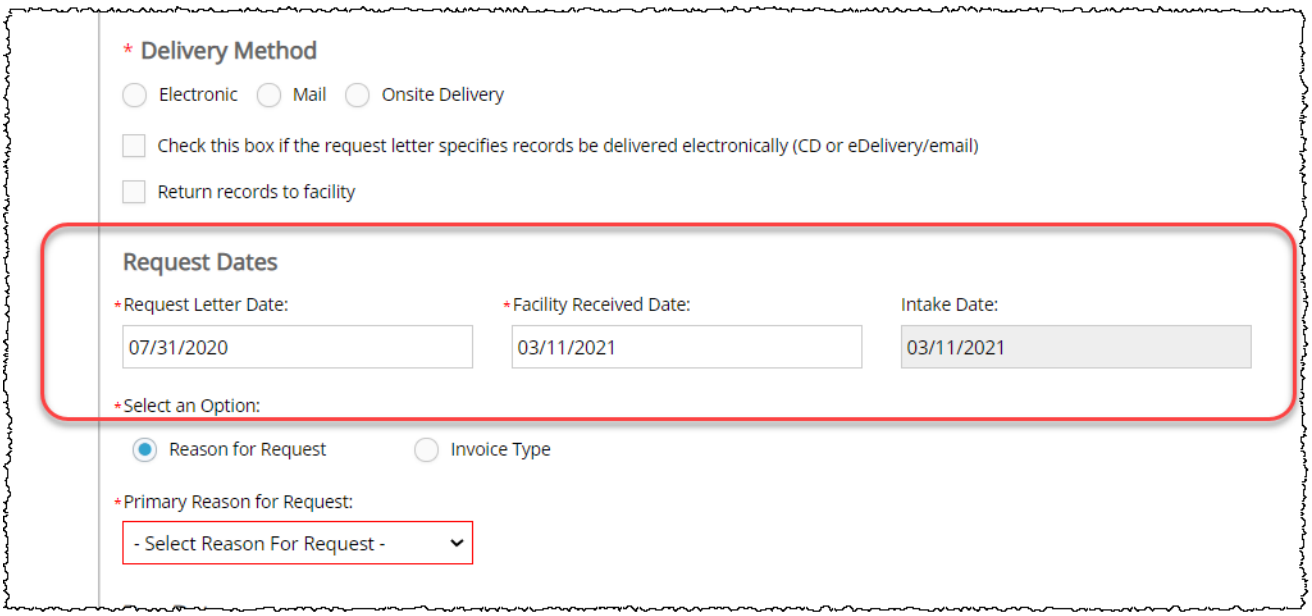
This option is subject to the same rules as the other **Onsite Delivery** choices:

- you are **NOT** required to attach Medical Records to the request in order to **Submit** it;
- you **MUST** provide a **Page Count** before you can **Submit** it.

New Request Dates section

We have moved these three fields to their own section of the **Request** screen, below **Delivery Method** and above **Reason for Request / Invoice Type**:

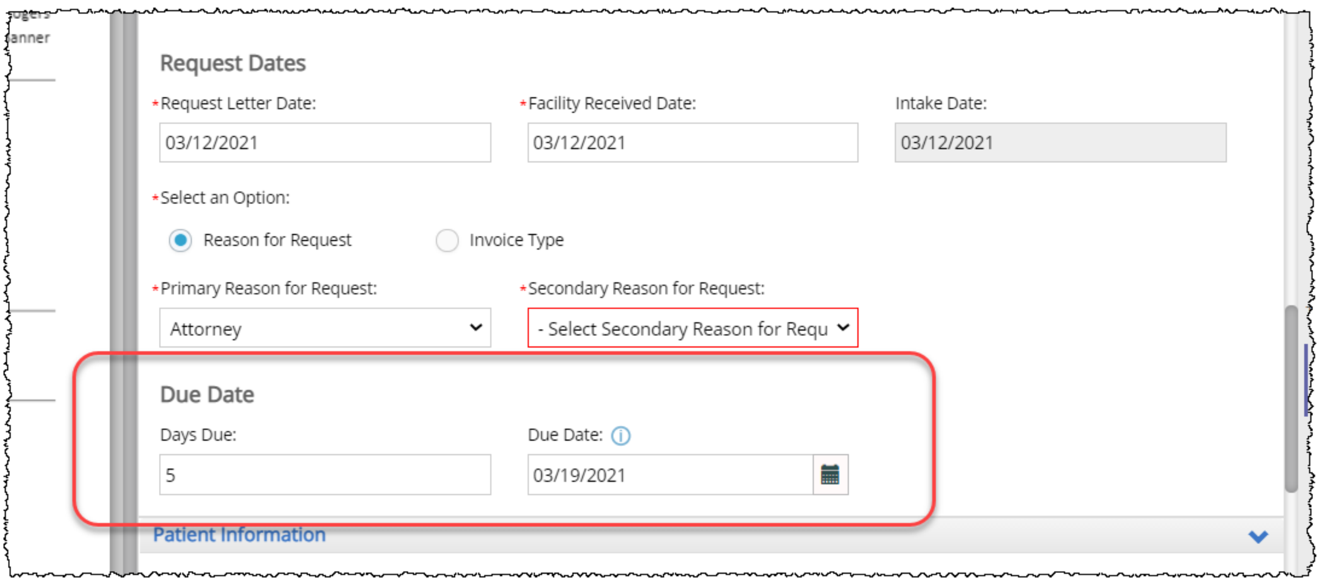
- **Request Letter Date**
- **Facility Received Date**
- **Intake Date**



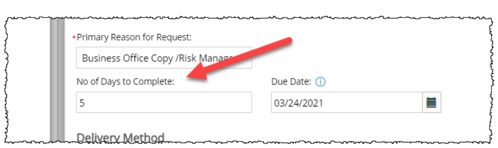
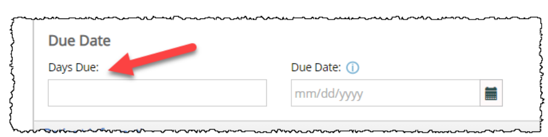
These fields were previously located near the top of the **Request** screen.

New Due Date section

To improve focus on timely delivery, we gave the **Due Date** fields their own section, located below the **Reason for Request / Invoice Type** fields.



Within this section, **Days Due** replaces the old field name **Number of Days to Complete**. The actual function of this field remains the same as it was before v4.0.

Was	Is Now
Number of Days to Complete 	Days Due 

Renamed, deleted, and moved data entry fields

Was	Is Now
Requester Fax	No longer displayed. This number was never actually used to transmit faxes. You can still send documents by fax as you did before.
Send Notification to Requester	No longer displayed.
Requester #	Ciox Requester ID
Request Notification Comments	Additional Special Notes
Same as Bill To	Same as Customer Requester / Bill To
Requested Electronic Delivery	Check this box if the request letter specifies records be delivered electronically
Certification Required	Check this box if the request letter specifies records be certified
Sensitive Data	Include Sensitive Data Moved to the **Medical Information** section.
HIPAA Reportable Disclosure	AOD Tracking Moved to the **Medical Information** section.
Years Searched	Moved to the **Medical Information** section. Only appears for some requests at Florida sites.
Number of CD/DVD/Flash Drive(s)	No longer displayed. Formerly appeared when the **Delivery Method** = Onsite — CD/DVD/Flash Drive. The old field required users to follow a complicated series of rules depending on whether Radiology images had been requested. We have removed the back-end business logic that led to those rules, and as such there is no longer a need to provide a media count.

Provider Lookup

HealthSource Clarity can be configured to search for the provider specified in the Request Letter.

If we find a match, the NPI (National Provider Identifier) is added to the request, which will help identify possible duplicates.

Search field	Function and format requirements
ZIP	ZIP only finds exact matches.
Address	Finds providers whose address starts with the search value. For example, a search value of 360 would find 360 Main Street, 3601 Main Street, 3608 Broadway, etc.
First Name	Finds providers with first names that start with values LIKE the search term. For example, A would find ADAM, ALLISON, ANDREA, etc. 1 alphabetic character required.
Last Name	Finds providers with last names that start with values LIKE the search term. For example, SMITH would find SMITH, SMITHERS, SMITHFIELD, etc. 1 alphabetic character required.
NPI	Exact match only. Full 10 digits required. If you enter an NPI, the other search fields are disabled.
Organization	Finds organizations with names that start with values LIKE the search term. For example, MED would find MEDICAL, MEDICINE, MEDIATOR, etc. 1 alphabetic character required.

Provider Lookup rules

NPI is the only search field that can (and must) be used by itself.

The table below shows the minimum rules. You can enter more search values if desired. For example, you could enter **ZIP** + **Street Address** + **First Name** + **Last Name** + **Organization Name**.

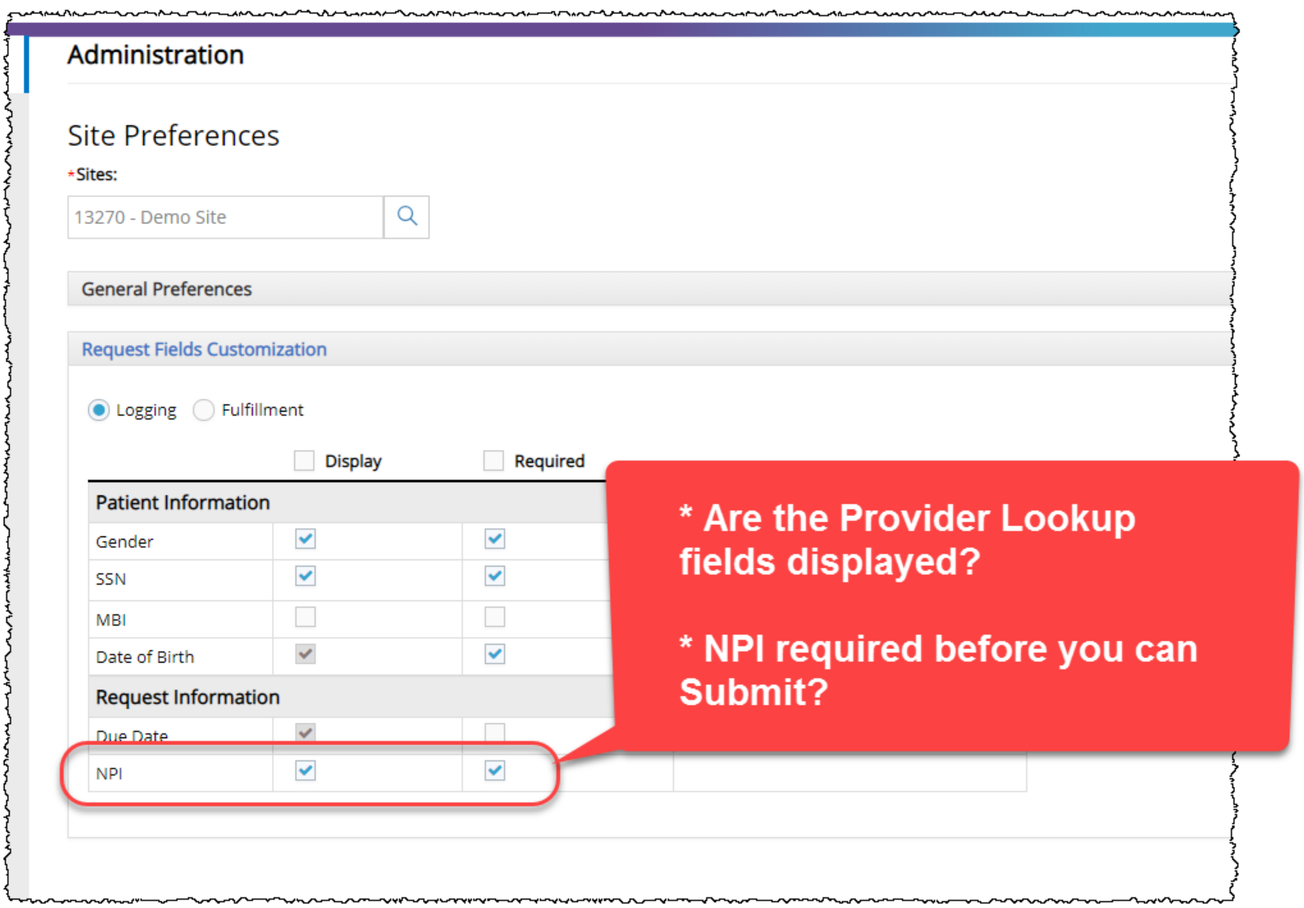
Search field	Minimum other search fields required
ZIP	Any 1 except NPI
Street Address	Any 1 except NPI
First Name	1 of: • ZIP • Street Address OR Last Name + Organization Name
Last Name	1 of: • ZIP • Street Address OR First Name + Organization Name
Organization Name	1 of: • ZIP • Street Address OR First Name + Last Name
NPI	None allowed

Site-level setting

Group Administrators control how the **Provider Lookup** fields work.

Setting	Purpose
Display	The **Provider Lookup** fields appear for **Logging** or **Fulfillment**.
Required	Before the request can be submitted: The **NPI** field must contain a value **OR** the **Provider Not Found** checkbox must be selected.

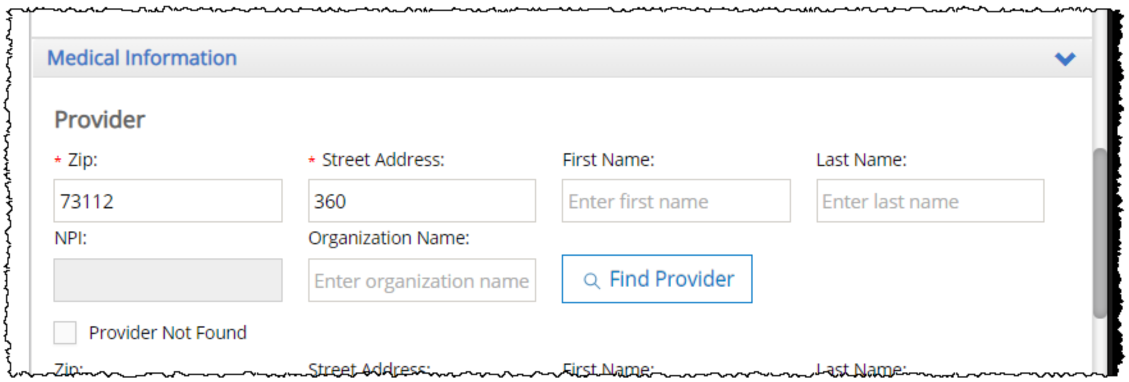
These settings are available from the **User Management** — **Site Preferences** — **Request Field Customization** screen.



Using the Provider Lookup function

These instructions assume that the **Provider Lookup** fields are enabled for the site and that the **NPI** value is required to submit requests from **Logging** (page 38).

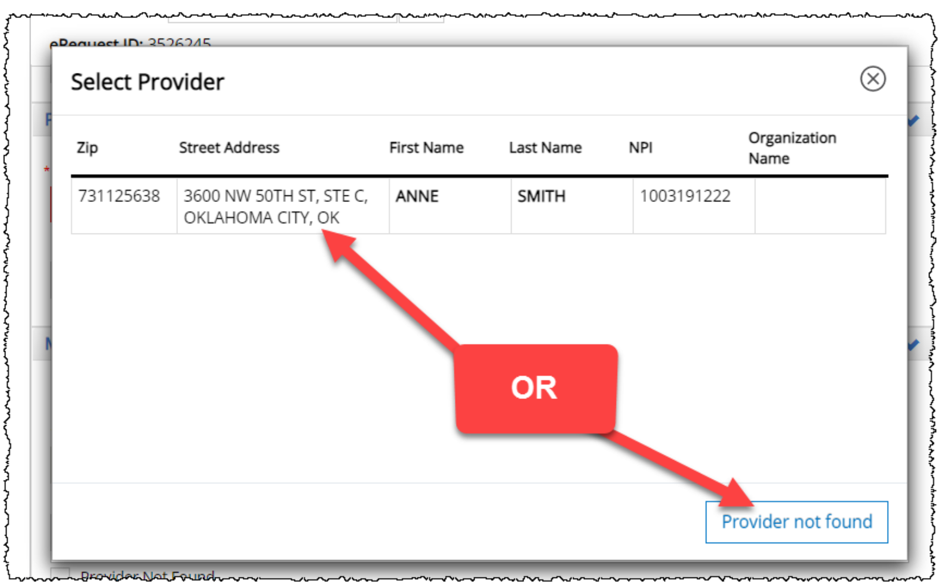
1. Enter the appropriate **Provider Lookup** values (page 36) and click **Find Provider**.



2. Does the **Select Provider** window show possible matches?

   2.1 **YES** — Click the provider. The window may list several choices.

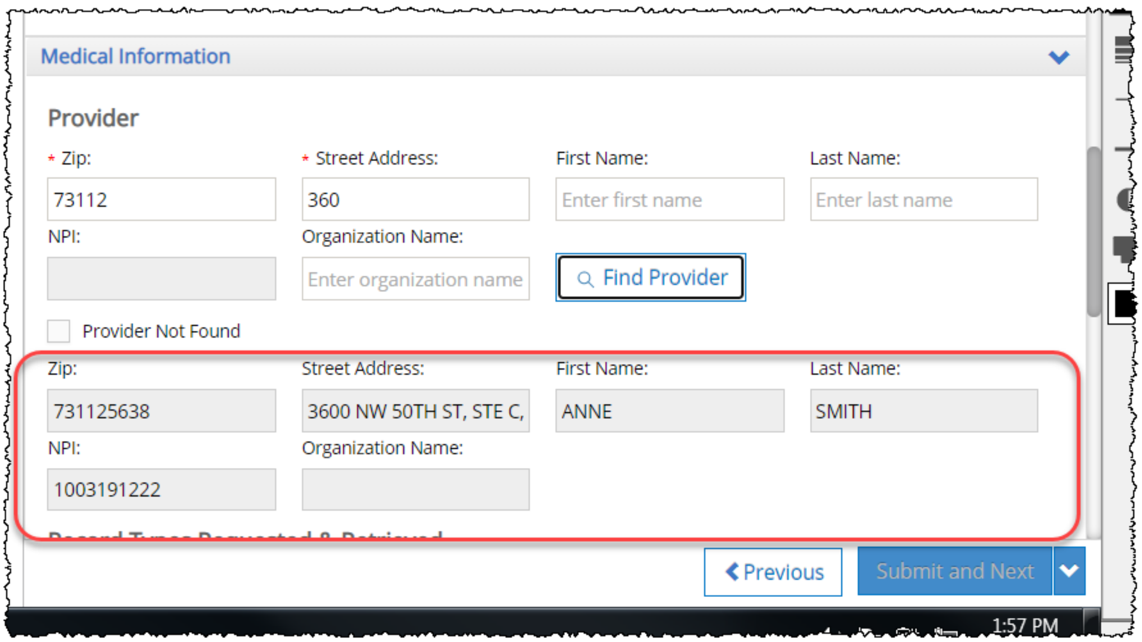
   2.2 **NO** — If you're sure you entered "good" search values, click **Provider not found**.



3. The read-only **Provider** fields are automatically filled with data.

   3.1 **Provider Not Found** will be checked if you picked that option in Step 2.2.

   3.2 You can also select **Provider Not Found** manually, which clears any data in the read-only fields.



BROWSERS USED DURING DEVELOPMENT

We used these browser versions during the development of **HealthSource Clarity v4.0**:

Browser	OS	Version / Build #
Chrome	Windows 7 or 10	89
Internet Explorer	Windows 7	11.0.9600.18617
Internet Explorer	Windows 10	11.356.18362.0
Edge	Windows 10	89

Check that your browser is up-to-date to avoid possible problems with the new release.

	Clear your browser cache daily for best performance.