



# HEALTH **SOURCE**

## 9.0 Release Notes

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### **Document Revision History**

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# HealthSource TrayApp Release Notes

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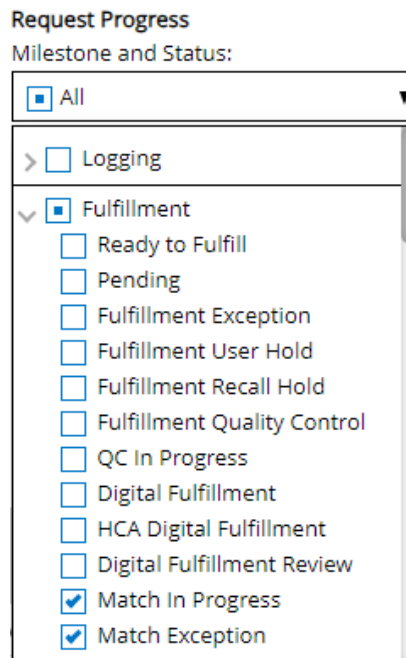
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## PAYD New Post-Fulfillment Exception Queue

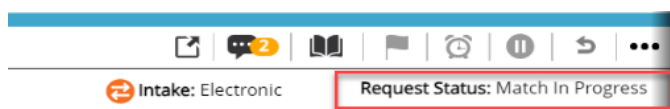
The request flow after fulfillment has been changed to send PAYD requests to ChartFinder for customer validation prior to sending the request to the Back Office. For most Users there is nothing to do differently. However, for the post-fulfillment Price Review team, there are changes to your workflow.

After Fulfillment submission and/or Fulfillment QC, now requests will be routed directly to ChartFinder to electronically match for accurate pairing of the chart ID and request ID. This process includes changing the Customer ID when appropriate and validating the Customer ID is correct *before* going to the Back Office. This will decrease the delay when sending to the Back Office first and then to ChartFinder. The Price Review team will use the **Match Exception** status to filter requests that need manual editing.

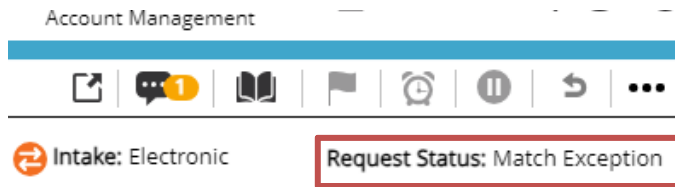
There are two new **Fulfillment statuses** in the Request Search screen for all Users. The statuses apply to only PAYD Major Class requests. Only the User role of *Account Management* is allowed to make edits to a request in the Match Exception status. No edits are allowed when in the Match in Progress status. The new Fulfillment statuses are below



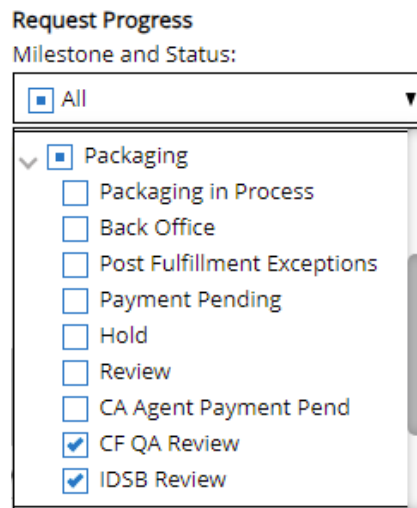
- Match in Progress (read-only)



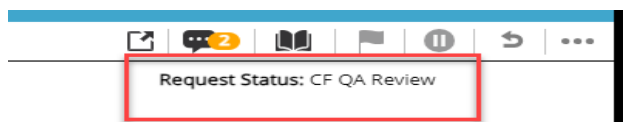
- Match Exception (edits by Account Management role only)



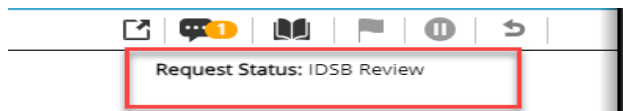
In addition, there are two new **Packaging** statuses to show the flow status of the request



- CF QA Review (read-only) - Requests move to CF QA Review status for ChartFinder QA process, upon successful match process



- IDSB Review (read-only)- The PAYD requests, set for an *IDSB delivery* will move to IDSB Review status



There are new History events to show the request flowing through the new process. An example of a successful 'match' is below

Date ↕	User Name	Event Description
10/27/2023 09:18 AM	System Auto	Request state changed from Processing-Match Inprogress to Processing-Workflow Completed
10/27/2023 09:18 AM	Svc Wf Unityqa	Match In Progress request fetched
10/27/2023 09:18 AM	System Auto	Match found. Request will be routed from Match In Progress to next status.
10/27/2023 09:18 AM	System Auto	Request state changed from Processing-QC In-Progress to Processing-Match Inprogress

An example of an unsuccessful match is below and needs to be processed by the Price Review team

Date ↕	User Name	Event Description
11/02/2023 12:34 PM	System Auto	Request state changed from Processing-Match Inprogress to Processing-Match Exception
11/02/2023 12:34 PM	Svc Wf Unityqa	Match In Progress request fetched
11/02/2023 12:34 PM	System Auto	No match was found and the request will be routed to the match exception for further review. Reason: Patient info or Chart id mismatched.
11/02/2023 12:34 PM	System Auto	Request state changed from Processing-QC In-Progress to Processing-Match Inprogress

## User Experience & Technical Enhancements

User Type (End-User, Administrator, Technical)	Area	Problem/Error Solution implemented/amended behavior	Reference #
End-User	esMD	Pull List requests for Performant RAC Region 1 and RAC Region 2 will now be delivered via esMD	69845
End-User	esMD	HealthSource enabled Requester 2416875, Performant Recovery RAC Region 5, and Requester 2315346, SMRC Noridian Healthcare Solutions for esMD delivery	70063
Technical	PAYD to CF to Back Office	Changes to PAYD flow for fulfilled requests to be sent to Chart Finder prior to going to Back Office to decrease turnaround time	65476
Technical	Logging Automation (Stork)	Phase 3	70192 69619 69435 69569 69931