# HEALTH SOURCE

# 9.2 Release Notes

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**Document Revision History**

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# eMDR Logging Automation – Pilot

Epic: UNITY-69118, AUDA-9815

As a Center for Medicare and Medicaid Services – Health Information Handler (CMS - HIH), Datavant receives Electronic Medical Documentation Request (eMDR) Letters for Medical Claim Audits. The new automatic logging feature intelligently captures and records relevant data of the eMDR letters. While the auto-logging happens, the application tries to recognize the Site Id from the National Provider Identification Number (NPI #) and if the Site Id is identified as an AudaPro Application's Site, a request will be routed to AudaPro for AudaPro Users to review and Approve.  When the request is Approved in AudaPro, a request gets created in AudaPro and will be routed to HealthSource with "Ready to Fulfill" status. The Requester information will be identified based on the Jurisdiction with which an eMDR is sent. If a Site Id is not identified or it doesn't exist, the Request will be moved to the "eMDR Request Review" queue in HealthSource.

## eMDR Request Review for Group Administrators

A new Menu option "eMDR Request Review" is added to view the parked requests that did not retrieve a Site Id. These requests will be reviewed by a HealthSource User and Site Id will be assigned. Currently, the access to view this page is assigned to Group Administrators only.

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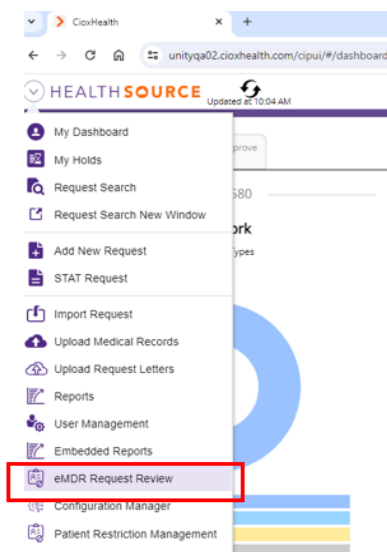
# Administrator Setup – eMDR Site Configuration in HealthSource Platform Admin

Step 1: CMS Site Id to Payer Id Mapping: Go to "Site Configuration" and select "CMS Site to Payer Mapping". Click ⊕ to Add new Site Id and NPI #.
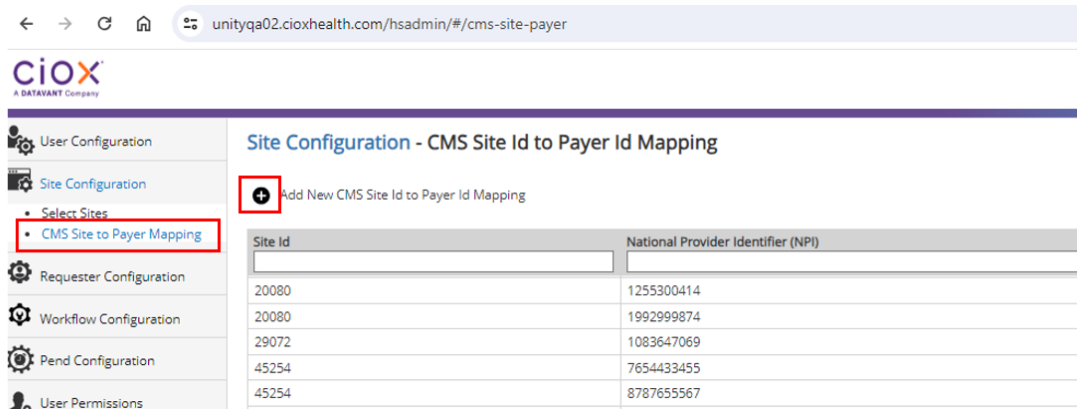


Step 2: eMDR Site Configuration in Platform Admin:  Go to Site Configuration > Select Sites, select a Site and click on "Edit Selected Items" to enable "AudaPro eMDR" for request creation in AudaPro.

NOTE: For "AudaPro eMDR" to be operational, "AudaPro" flag needs to be enabled as well.
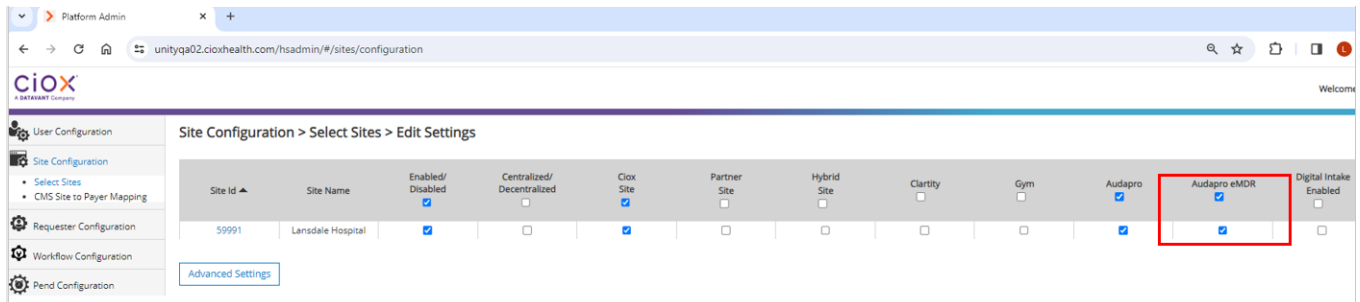
Step 3: eMDR Requester Configuration in Platform Admin: Go to Requester Configuration and select the tab "Jurisdiction to Requester Mapping". Click ⊕ to add New Jurisdiction and Requester values.



## Pilot Program Details:

The eMDR Logging Automation feature is currently in a pilot phase, with access limited to Jefferson Health group of users and Sites. This allows us to gather valuable feedback and make refinements for a broader release to all the eMDR registered Providers and Sites.

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# PAYD flow to Chart Finder for Correspondence & Cancel

Epic: Unity-70264

The HealthSource Release 9.0 on November 9, 2023, included an enhancement to the flow after fulfillment to send PAYD requests to ChartFinder for customer assignment validation prior to sending the request to the Back Office.  Now Corresponded requests will also be routed to ChartFinder in similar fashion.  The Pricing Review team has been able to manually edit requests and now they will also be able to cancel  requests (created after 11/30/23) when in the Match Exception status.

# STORK Request Logging

**What does STORK stand for?** Structured Text Outputting Request Knowledge.

**How does it work?** STORK leverages Computer Vision and AI to analyze record requests and populate HealthSource data entry fields. This means fewer manual data inputs for you!

**How does this help?** With STORK assisting with data entry, it allows our Loggers to redirect attention to the crucial aspects of Logging – validating requests and authorizations. It's like having a reliable assistant handling the heavy lifting.

**How is STORK's quality?** While STORK is a superhero, it's not flawless. There might be instances where a field needs correction. The Logger or Fulfiller will be able to edit/correct any incorrect information that may have been input incorrectly.

**Should I "return the request to Logging" if I see an error?** No need to return to logging or track errors. Simply review logged information and make updates directly. The product team will be tracking these changes for continuous STORK training.

**How do I know if something was logged by STORK?** Data entry fields completed by STORK happen prior to the request showing up in "ready to log". If you're looking at a request that "magically" has a Requester, Patient info, etc. and there is no user name in the history stating Requester selected, etc – it was STORK. Since this is the first step in the logging process, this information will be found at the beginning of the history chain.

**How do I make sure my site is taking advantage of STORK?** Request letters must be uploaded via "HS Upload Request Letter" or Faxed to the site for it to be STORK eligible. Using "Add New Request" will disqualify request letters from going through STORK and will create more manual work for you. See this Uploading Request letters tip video for additional instruction!

**How long does it take for an uploaded request to go through STORK and show up in my queue?** Requests are processed in order of receipt. TAT may vary based on volumes of requests. The majority of requests process in under 30 min, and will not exceed 4 hours.
Is my site already live with STORK? If Central Intake handles the logging for your site – STORK is live.

**Does the Fulfillers job change for requests that have gone through STORK?** No, a quick review of entered data is still required. If tweaks are needed, you should make the correction and move on to capturing the medical records.

# Add New Request Tool Tip [Pendo]

A new tooltip has been added to HealthSource guiding users on the correct usage of the *Add New Request* feature. This tooltip will be visible to all Datavant users that use the *Add New Request feature* to guide them into best practices.

## Adding a New Request?

Remember that that this feature is meant for *single requests only*, such as...

- Patient Walk-In
- Logging a single request for quick data entry
- Express ROI (Logging and fulfilling a single request)

**Do not use this feature for...**
- Batch entry requests
- Scanning requests and "saving" for logger later

Using it for those requests will bypass the OCR/NLP process and will require manual "splitting" of requests.

Instead, use **Upload Request Letters** (uses OCR/NLP and auto-splits requests).

- Uploading a pdf "batch" of request letters with divider sheets between request
- Uploading individual PDF request letters

Faxing and Emailing directly to HealthSource are also viable solutions for single request import.

For best practices on this process click here!

# User Experience & Technical Enhancements

| User Type (End-User, Admin, Tech) | Area | Problem/Error<br>Solution/New Behavior | Ref # |
|---|---|---|---|
| End-User ▾ | PAYD-CF Patient Identifiers | Patient Identifier Value is not removed from the DB when the customer got changed from the match process | 70360 |
| End-User ▾ | PAYD-CF | Requests are going to Match Exception when the Requester and Reason for Request are different when the customerid is not matched between CH and HS.<br><br>Add invoice type cd check to the match process so when the Invoice code is the same amongst the Reasons as it does not warrant an exception. | 70564 |
| Tech ▾ | Artifact Processor | Change the artifact processor to only push requests to the Back Office once, not twice. | 70675 |
| Tech ▾ | Artifact Processor | When the API fails, the metadata is now captured in the artifactprocess audit trail | 70528 |
| Tech ▾ | IDSB – Digital Fulfillment | The Digital Only flag is getting incorrectly removed after Digital Fulfillment Review.<br><br>The Digital Only flag remains in the erequest details table | 70812 |
| Tech ▾ | Interactive Voice Recognition (Amelia) | Reduce the current look back time period for Patient name & DOB searches from 180 days to 90 days for better performance | 70658 |

| Pick One ⌄ | Logging automation | Stork Part 5<br>● Add Fee Approval Limit to api<br>● Add Requester Ship To Address name to api<br>● Change to send the electronic_api_code for matching instead of Reason for Request<br>● Change logic when there is any error (ex: NLP_ERROR) from intakeservice to create a request with Ready To Log status<br>● Record Type support addition<br>● Remove Reasons for Request for matching | 70656<br>70660<br>70525 |
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