HEALTH SOURCE

10.1 Release Notes

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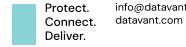
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Facility Internal (BOC) changes

Healthsource has had the BOC/Business office Centralized option for several years. In the past, you could only **mail** records to a 3rd party address and the option to deliver records electronically was unavailable. With this Healthsource Release, we'll now have the capability to select an electronic account for a 3rd party (if available) under the 'Ship to' section. If the requester is not found under the Ship to requester look up, there is no need to submit to the New Requester team for an addition. The capability to manually enter a 3rd party shipping address under the BOC request type has not changed.

The goal of this new feature is to speed up delivery times to customers that already **exist with electronic accounts.** For example the facility's legal counsel and Insurance companies often need records delivered electronically, and they have an established Electronic account.

Now, a 3rd party Requester can be selected from an additional requester search lookup on the Request screen, and a customer with an electronic preferred delivery method can be selected. The ability to use the Same as Customer Requester/Bill To checkbox exists as well as the ability to type a 3rd party address for mail delivery.

As a reminder, please don't change the Request Type to Standard and/or send it to the New Requester team, or return the request to logging.

Reminders
- The New Requester team does not create accounts for shipping purposes. They create for billing purposes only. (They can create only mail)
- If you can't find the 3rd party Requester in the new lookup, please *manually enter* the address in the Ship To fields and submit - Do not push to the New Requester Team

Primary Reason changes
In the past there has been only one primary reason for BOC requests. A new primary reason has been added to be used when the request is Financial services related (ex: Insurance)
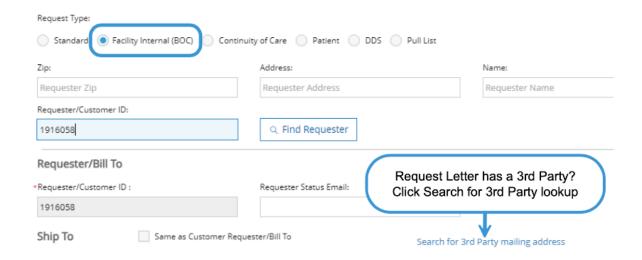
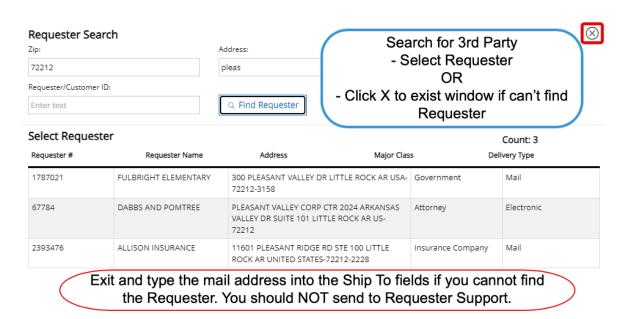| Primary Reason	Change type
Patient Financial Services Claims /Appeals and Denials	New reason
Business Office Copy/Risk Management	Changed name- Facility Operations – Internal Litigation/Risk Management
Special Projects	To be released soon

When a Request Letter directs the facility to deliver the MR to a 3rd Party (ex: legal counsel, insurance), perform the following steps after selecting the Site and Facility Requester as you always do.

Step 1 - Select the new link, Search for 3rd Party mailing address

Step 2 - Enter Zip and Address to search and select the 3rd Party. If you cannot find the Requester, close the window and enter the Ship To mail fields

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Step 3 - Enter the Requested By and Attention To fields

If you cannot find the 3rd Party Requester, you should enter the 3rd Party address from the Request Letter and it will be delivered via mail. If you edit the 3rd Party Ship To address fields, it will be delivered via the Bill To Requester's delivery method and is also dependent on Back Office settings.

User Experience & Technical Enhancements

User Type (End-User, Admin, Tech)	Area	Problem/Error Solution/New Behavior	Jira Unity Ref #
End-User ▾	BOC Improvements	See the previous pages for explanation.	71008
End-User ▾	MR attach- No TrayApp	A new method has been created to open requests that have Medical Records attached without using the TrayApp. This is not a replacement of the TrayApp, but in addition for certain scenarios. This feature is being rolled out to specific Sites for testing in the pilot phase	71877
Logging auto… ▾	STORK	When the Site is enabled for AutoFax, the AutoFax fax number will be auto populated	72485
Digital Fulfill… ▾	Priority	If a request has a priority value (ex: 1-5) on it, the value is passed in the create api for Digital Fulfillment.	72509