

10.4 Release Notes

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datavant

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Digital Partial Fulfillment - New!

The Fulfillment process and Record Type section on the Request screen has changed. Please see the information below.

What does digital partial fulfillment mean?

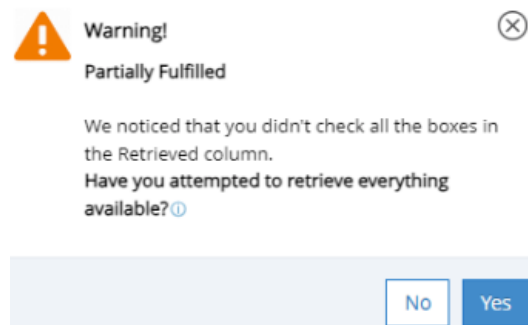
Digital Partial Fulfillment means *some* of the records were retrieved digitally, but not all of the requested records, therefore the request is only partially fulfilled. In the past the digital retrieval logic did not look for specific record types (ex: Discharge Summary) since it was always attempting to retrieve *all* records. Now the logic has changed so specific record types are digitally retrieved.

Has workflow changed for a CSR? Yes!


The CSR is responsible for attempting to manually fulfill the record(s) that were *not* digitally retrieved. When all of the records cannot be fulfilled manually or digitally, the request should be submitted to the Back Office as normal, or if applicable a correspondence letter can be sent.

There are several changes to the Record Type section including a new Warning popup as listed below.

- **Major** changes:
 - When a Fulfiller clicks Submit and Next or Submit and Close, a new popup window appears for the Fulfiller to *confirm* that not all of the requested records have been retrieved/attached. Click Yes if you are finished and ready to submit. Click No, or the “x” in the upper right, to return to the Request screen.




- A blue cloud image displays beside a specific record type that was digitally retrieved, for example ED Records.
 - the blue cloud image displays in the upper right to remind users what the image means

* Retrieved
 Digitally Retrieved

Retrieved All

Partial Fulfillment

Abstract

 ED Records

- A new Pending status reason, **Partially Fulfilled**, is applied when only part of the records are retrieved digitally. These requests are included in the Work Next workflow like the other Pending reasons. The CSR needs to attempt to manually fulfill the remainder of the records.

Request Progress

Milestone and Status:

All

Status Reason:

All

Pending

- Billing
- Clinic
- Cross-Coverage
- Digital Fulfillment Exception
- Digital Review
- EMR Logging
- EXPIRED HOLD
- Global Field Input Complete
- GLOBAL QC APPROVED
- GLOBAL QC FAILED
- Global QC Level 1
- GLOBAL QC LEVEL 2
- HIMD Review
- Internal Department
- Manual Quality Control
- Microfiche/Microfilm
- Motion to Quash
- Offsite Copy Service
- Partially Fulfilled**

- **Minor changes:**
 - A red required asterisk for both Requested and Retrieved labels
 - A label name revision to “Records Requested”
 - Re-alignment of requested record type name and retrieved checkbox to improve readability. The screen below shows the revised re-alignment & layout.
 - *Note: You will not see digitally partially retrieved requests until your Site(s)/Requests have been configured to use Digital Fulfillment.*


Record Types Requested & Retrieved

Include Sensitive Data AOD Tracking

***Date Range:** 08/01/2024 — 08/01/2024 [Clear](#)

From: Any & All Fulfiller Review Most Recent Visit
 Months prior to Request Letter Date

To: Fulfillment Date Facility Received Date Request Letter Date

* Records Requested	* Retrieved Digitally Retrieved
 Attorney_HospitalLien <ul style="list-style-type: none"> ✓ Abstract ✓ Admission Report ✓ Ambulance Report ✓ Cardiology Reports 	<input type="checkbox"/> Retrieved All <input type="checkbox"/> Partial Fulfillment <input checked="" type="checkbox"/> Abstract ☁ <input type="checkbox"/> Admission Report <input type="checkbox"/> Ambulance Report <input type="checkbox"/> Cardiology Reports Add Record Type: <input type="text"/>

[Add New Date Range](#)

- History events for the new Pending reason, Partially Fulfilled, are listed below.
 - *Note: More events will be added in the near future to show which Record Types were digitally retrieved and which were manually retrieved. When Record Types are removed or added, events display showing the record types that exist upon submitting/saving the request as in the past.*

Event description	Explanation
Request marked as Fulfillment Pend with reason: Partially Fulfilled	Request has been digitally retrieved and is pending manual fulfillment by a CSR
Request submitted with partially retrieved records.	Requests may have digitally and manually retrieved records. The new Partial Warning popup was

		displayed and the CSR clicked Yes to submit.										
<table border="1"> <tr> <td>Svc Bot Qa</td> <td>Request marked as Fulfillment Pend with reason: Partially Fulfilled and Comment: Test API With CDR Doc ID</td> </tr> <tr> <td>System Auto</td> <td>Request state changed from Processing-Digital Fulfillment to Processing-FulfillmentPend</td> </tr> <tr> <td>Svc Bot Qa</td> <td>Digital Fulfillment request fetched</td> </tr> <tr> <td>Svc Bot Qa</td> <td>Selected following record types as retrieved: A, FA for Dates of Service: 01/01/2013 - 06/01/2014</td> </tr> <tr> <td>Svc Bot Qa</td> <td>Medical Record 11 page(s) electronically attached</td> </tr> </table>	Svc Bot Qa	Request marked as Fulfillment Pend with reason: Partially Fulfilled and Comment: Test API With CDR Doc ID	System Auto	Request state changed from Processing-Digital Fulfillment to Processing-FulfillmentPend	Svc Bot Qa	Digital Fulfillment request fetched	Svc Bot Qa	Selected following record types as retrieved: A, FA for Dates of Service: 01/01/2013 - 06/01/2014	Svc Bot Qa	Medical Record 11 page(s) electronically attached		Events that are performed by the system electronically when partial digital retrieval is successful. (User Name will be something other than a person's name)
Svc Bot Qa	Request marked as Fulfillment Pend with reason: Partially Fulfilled and Comment: Test API With CDR Doc ID											
System Auto	Request state changed from Processing-Digital Fulfillment to Processing-FulfillmentPend											
Svc Bot Qa	Digital Fulfillment request fetched											
Svc Bot Qa	Selected following record types as retrieved: A, FA for Dates of Service: 01/01/2013 - 06/01/2014											
Svc Bot Qa	Medical Record 11 page(s) electronically attached											

Digital Partial Fulfillment - Frequently Asked Questions

Area	Changes Y/N	Explanation
Dates of Service (DOS)	Y	Actual dates are in bold font
Dates of Service From & To radio buttons	N	Can still be used
Digital Review Pending reason	N	Requests can be electronically marked Pending for Digital Review for the CSR to process
Digital Fulfillment Exception Pending reason	N	Requests can be electronically marked Pending for Digital Fulfillment Exception for the CSR to process
Export	Y	Search results export to file now includes the Pending reason, Partial Fulfilled
Gold set	N	Can still be used
History events	Y	Two new events representing the new Pending reason, Partially Fulfilled
Other record type	N	Can still be used
Page counts	Y	Total number of digitally retrieved <i>and</i> manually retrieved combined pages
PAYD requests	N	The partial fulfillment reasons can be optionally selected as in the past (ex: PAYD requests require)
Pend	N	Can still be used to place a request on Pend
Print 2Q	Y	Same screen changes & popup Warning as in

		Fulfillment screens
Reason for Request	N	When the RfR is changed, the Requested record types are removed/revise as in the past, and all the record types and checkboxes in the Retrieved area are removed. There is currently no ability to manually re-mark a Record Type as digitally retrieved.
Remove/delete MR page	N	Can still be used. A specific page(s) of the MR document can be deleted regardless if digitally or manually fulfilled. Remember to remove the checkmark by the Record Type when applicable.
Save and Close	N	Can still be used
Search requests filter	Y	Fulfillment Pending status has a new reason, Partially Fulfilled. When a request has been digitally partially fulfilled, the status changes to this awaiting Fulfillers to manual fulfill
Submit and Next, Submit and Close buttons	Y	Partially fulfilled requests that are submitted trigger a Warning popup



Digital Fulfillment Review status- name revised

The Digital Fulfillment Review status has had a name change to **Digital Auth Review** to reflect more specifically that the CSR needs to review the authorization. This change is seen in the following screens below

Request Search, Status filter option:

Request Progress
Milestone and Status:

- All
- ▼ Fulfillment
 - Ready to Fulfill
 - Pending
 - Fulfillment Exception
 - Fulfillment User Hold
 - Fulfillment Recall Hold
 - Fulfillment Quality Control
 - QC In Progress
 - Digital Fulfillment
 - HCA Digital Fulfillment
 - Digital Auth Review

Request screen- top right

Request Status: Digital Auth Review

History events*

Svc Bot Qa	Request routed to Digital Auth Review for the following reasons: Authorization Review
Kim King 1	Digital Auth Review request fetched
Kim King 1	Digital Auth Review returned

*There are two events that have not had the name change yet and will be changed in a future release.

User Experience & Technical Enhancements

User Type (End-User, Admin, Tech)	Area	Problem/Error Solution/New Behavior	Jira Unity Ref #
End-User ▾	Auto Fax	Pilot phase- The Delivery status of Auto Fax Failed has been removed since a new status, Auto Fax Exception, was introduced with Rel 10.3.	72598
End-User ▾ Digital Fulfillment ▾	Digital Fulfillment Review status	The Fulfillment milestone Status, Digital Fulfillment Review, has been re-named Digital Auth Review . This status still means the request needs manual review.	72628
End-User ▾ Digital Fulfillment ▾	Digital Partial Fulfillment	See previous pages for end user details. Added new property DigitallyRetrievedDocTypes to the Submit api and Create/Update api	71817 72657 72076
End-User ▾ Digital Fulfillment ▾	IEX Integration	For requests of sites that are using IEX ROI integration, when the patient is marked as "non-EMR" during the Logging process, the request will now be considered for Digital Fulfillment, and if appropriate will go to Digital Fulfillment Review for Auth Review. Changes to the Intake api and Create api (eip)	72629
End-User ▾ Logging autom... ▾	Logging Automation	HealthSource is overriding the Pt ID value that STORK sends so the identifier does not display on the Request screen. The Intake service api has been revised so it will not override. In addition the STORK team is revising to send 2 digits for all Pt Id 'codes'.	72642
End-User ▾	Search-Request	The Request Reason filter field was not filtering the requests correctly, including when	72576

	Reason	all Reasons were un-checked, requests would be returned. Now the Reason filter logic is corrected	
End-User ▾	Stuck-Packaging in Progress	Request with the check/money order details is not moving to the back office. Now the check_money_order flag fee_approval_limit column is selected in the latest AP code with RSP integration turned Off. (Release 10.3.1)	72647
Tech ▾	HCA Bot	Added logic so when the request is delivered, the Request Letter should be published to Rhapsody along with the invoice number/ request ID	72669
Tech ▾	OCR-HealthSource, Chart Finder & ARCH	Preparation for changing the OCR function from using OpenText to Textrack. Pre-release (off for sites)	72486 71993
Tech ▾	ASM- push requests	An update has been made for the ASM Team to push requests through to the Artifact Processor as a priority	68809