

9.3 Release Notes

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datavant

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Patient Restriction in Correspondence

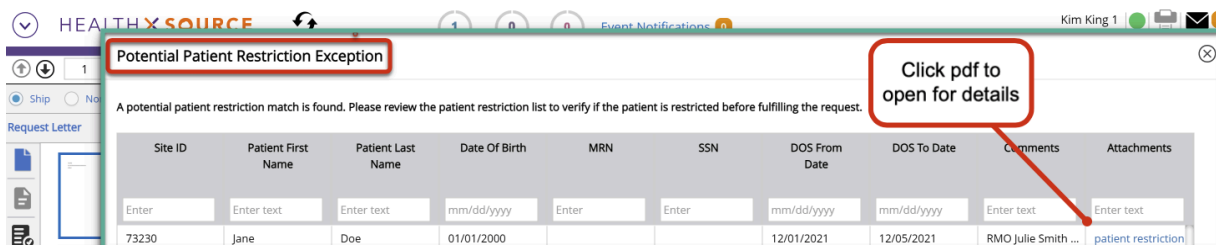
Epic: 70387

The Patient Restriction popup notification has been incorporated into the Create Correspondence workflow for CSRs. The Restriction workflow was originally released in June, 2022, in HealthSource but it did not apply when the Create Correspondence function was used.

When a User selects Create Correspondence, now the system automatically compares the following three attributes on the request to see if there is an existing restriction defined::

- Site
- Patient Last Name
- Date of Birth (Date of Birth field on request must be completed to apply restriction logic)

If there is a restriction built with the same Site, Patient Last Name (entire), and DOB, a potential patient restriction exception screen displays upon the request being opened, and now also upon clicking the **Create Correspondence** function. The CSR should follow the Site's procedures which is typically to notify the HIMD to determine if the request should be canceled.



In addition, requests that have a potential patient restriction have an icon image in the top right banner as seen below in red.



Reminder– Under HIPAA, covered entities (CE) must allow individuals an opportunity to request a restriction on the use or disclosure of their PHI. The CE is not required to agree to the requested restriction because often the disclosure of a patient's PHI is necessary for treatment, payment and healthcare operations. If the CE agrees to the restriction, the CE must comply with the exception of emergency treatment. A common example of a patient restriction is a patient pays for a procedure or diagnostic test out of pocket and wants to restrict the release of the medical records pertaining to the procedure or test to their health plan.

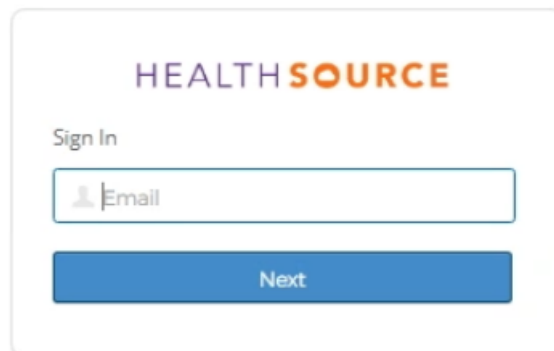
A patient restriction can be set-up by any of the following three HealthSource user roles using the menu option, *Patient Restriction Management*.

- Customer Service Representative
- Internal Management
- Group Administrator

Datavant logo

The Ciox company purple and orange logo on the HealthSource login page and Admin login page have been replaced with the black Datavant logo. More company name changes will be completed in a future release.

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HEALTHSOURCE

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User Experience & Technical Enhancements

User Type (End-User, Admin, Tech)	Area	Problem/Error Solution/New Behavior	Jira Ref #
End-User ▾	Document Purge- DRDP	When the Request Letter meets the expiration date and gets purged from the Common Document Repository (CDR), the other documents could not be viewed as the icons on the screen did not exist. Now the document icons (MR, Certification, Misc, Certification) icons display and can be used.	71023
End-User ▾	History screen	The History events are for the wrong request upon clicking the Search button when the request has already been searched and displayed in the search results screen. The issue has been corrected so the History screen is accurate.	70370
End-User ▾	IDSB - Digital Fulfillment	Hotfix 9.2.1 released 12/22/23. Changes to support OMAP reporting for the PAYD newer workflow to close/end the request workflow upon HS sending PAYD requests to Chart Finder; and remove the Days Due value on the Request Search screen	70910
Admin ▾	esMD/eMDR	Allina Health has been configured to receive electronic Document Requests (eMDRs), and create eMDR requests from AudaPro	70892
Admin ▾	Logging Automation (STORK)	Optimizations Part 6 (STORK): <ul style="list-style-type: none"> New Site Configuration setting, STORK Parse Allowed Enabled, to enable/disable 	

		<p>logging automation per Site. Default is enabled</p> <ul style="list-style-type: none"> The service account, svc_EipAsync, has been replaced with a new STORK Account, svc_nlp_stork@cioxapps-dev.com, so end Users know that a person did not create the request 	70220
Admin ▾	Platform Admin, User Config- Global Vendor	The Vendor logic has been enhanced with a new flag to capture if the Vendor is considered "global". Also, the existing vendor names have been updated to CorroHealth Onshore, CorroHealth Offshore, WIPRO Onshore, and WIPRO Offshore	71009
Tech ▾	DRDP- PAYD Purge	The Delivery Date needs to be sent to the CDR via the Update metadata API so an exact expiration date can be calculated for purging documents..	70727
Tech ▾	IDSB - Digital Fulfillment	Hotfix 9.2.1 released 12/22/23. Change to remove the ChartID as a requirement to push requests to IDSB, when the fulfillment Digital Only flag is true	70912
Tech ▾	IDSB- Digital Only	When the fulfillment Digital Only flag is True, the request is now canceled if the request status changes to a manual state	70931
Tech ▾	RSP service	Turn on RSP Dependency Removal flag so requests can be logged (includes Auda Pro) and fulfilled; and move to Back Office after the RSP servers are back online	70934