



HealthSource

5.15 Release Notes

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Patient Restriction

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 new function is available to set up a patient restriction that will display a notification when a request is opened that matches the restriction patient information set up. The system automatically compares the following three attributes of a request

- 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 new potential restriction exception match screen displays upon the request being opened. The CSR should follow the procedures for the site to determine if the medical records should be released.




Patient Restriction Set-Up



A patient restriction can be set-up by any of the following three HealthSource User Roles using the new menu option, Patient Restriction Management.



- Customer Service Representative
- Internal Management
- Group Administrator

The screens below show the steps to set up a new patient restriction.

-  My Dashboard
-  My Holds
-  Request Search
-  Request Search New Window

-  Add New Request
-  STAT Request
-  Import Request

-  Upload Medical Records
-  Upload Request Letters

-  Reports
-  Patient Restriction Management

Patient Restriction Management

Search and Select Site(s) to Manage

Select Site or Health System Group

All	Site ID	Health System Group	Site Name	Site Address	City	ST	Zip
<input type="checkbox"/>	73230	Enter text	Enter text	Enter text	Enter text	Enter text	Enter text
<input type="checkbox"/>	73230	WellStar (GA)	Wellstar Digestive Willeo	9420 Willeo Rd	Roswell	GA	30075-6773

Patient Restriction List

Enter text to search

+ Add New Patient Restriction Export

Site ID	Patient First Name	Patient Last Name	Date Of Birth	MRN	SSN	DOS From Date	DOS To Date	Comments	Attachments	Active (ON/OFF)	Actions
Enter	Enter text	Enter text	mm/dd/yyyy	Enter	Enter	mm/dd/yyyy	mm/dd/yyyy	Enter text	Enter text	All	

Patient Restriction Information ⊗

Site Name : **Enter the required fields**

* Patient First Name :

* Patient Last Name :

* Date of Birth :

MRN :

SSN :

* DOS From Date :

DOS To Date :

* Attachments : [Browse files to attach](#)

Enter comments & date, name, etc

Comments :

Warning! ⊗

You cannot make changes to the required fields after they are saved. If you need to change, deactivate this restriction and add a new restriction.

Site ID	Patient First Name	Patient Last Name	Date Of Birth	MRN	SSN	DOS From	DOS To Date	Comments	Attachments	Active (ON/OFF)	Actions
<input type="text" value="73230"/>	<input type="text" value="Jane"/>	<input type="text" value="Doe"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="Enter"/>	<input type="text" value="Enter"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="Enter text"/>	<input type="text" value="patient restriction.g"/>	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>

Additional information can be added after the restriction has been added by clicking on Edit.

Workflow

After the patient restriction is set up, the system will automatically compare the request’s Site, Patient Last Name, and DOB to the Patient Restrictions. If there is a match on the Site, Patient Last Name, and DOB (all three), the following screen displays. The user reviews the potential patient restriction(s) and the attachment(s) for details on the patient’s restriction. Follow your site’s patient restriction procedures to determine what to do next.

Potential Patient Restriction Exception

A potential patient restriction match is found. Please review the patient restriction list to verify if the patient is restricted before fulfilling the request.

Site ID	Patient First Name	Patient Last Name	Date Of Birth	MRN	SSN	DOS From Date	DOS To Date	Comments	Attachments
Enter	Enter text	Enter text	mm/dd/yyyy	Enter	Enter	mm/dd/yyyy	mm/dd/yyyy	Enter text	Enter text
73230	Jane	Doe	01/01/2000			12/01/2021	12/05/2021	RMO Julie Smith ...	patient restriction

A new icon displays in the upper right ribbon for all requests that have a potential patient restriction.



The History screen displays the following event when a potential patient restriction match is found.

Request History

Date	User Name	Event Description
05/31/2022 09:55 AM	System Auto	Request flagged as a potential restricted patient. Patient restriction list presented for user review
05/31/2022 09:55 AM	Kim King 1	Fulfillment Pend request fetched

Performance Trending Changes

The Performance Trending feature has a change.

Request submissions in Awaiting Certification, Fulfillment QC, Recalled Pend, and View & Approve-Awaiting Delivery will NOT be counted anymore since these tasks do not have a MAP (Mixed Adjusted Production) value

- The Fulfillment donut will not increase upon performing Fulfillment QC
- The Fulfillment donut will not increase upon performing a Certification
- The Fulfillment donut will not increase upon performing an Awaiting Delivery
- The MAP donut will not increase upon performing any of the above
- The graph is expected to be updated in June 2022. The figures logged within it are expected to be out of sync until that time.

PAYD & Duplicate Check Changes

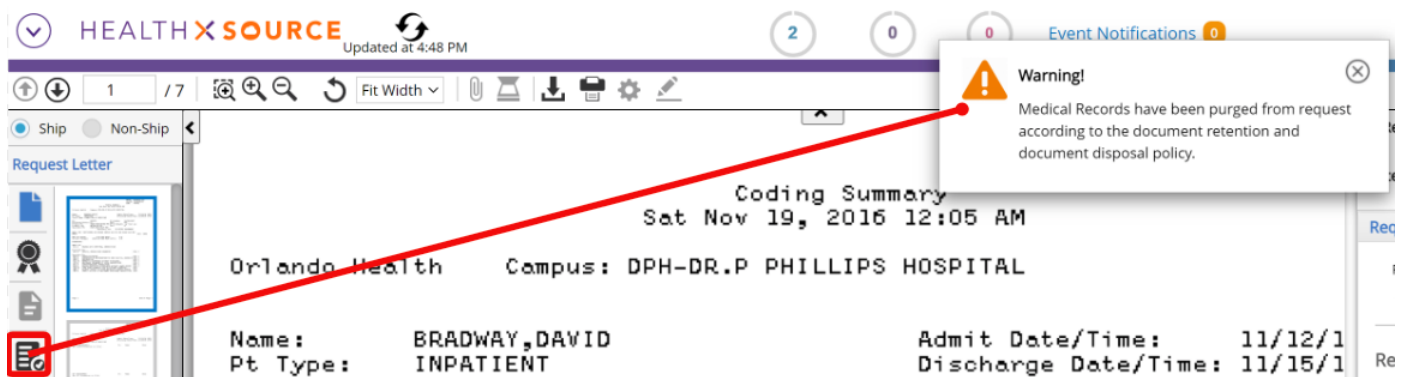
PAYD requests will no longer have the duplicate request logic applied.

Medical Record Automatic Purge (configuration required)

A new feature has been created to enable delivered Medical Records to be purged/removed from their respective request based on the DRDP (Document Retention and Document Disposal) configuration. The new purge process has the following highlights:

- The DRDP team controls which medical records are purged based on several levels
 - Patient Name/DOB, Request ID, Site ID, Customer ID, Employee Number
 - Contractual holds
 - HealthSource default hold is 1 year unless specified as an exception above
- Audit History is updated with a purge event
- The medical record is no longer retrievable

When a request is opened that no longer has the medical record because it was purged, a Warning message displays when the Medical Record icon is clicked.



The following event displays in History when the medical record has been purged from the system.

Date	User Name	Event Description
05/16/2022 04:42 PM	ROI	Request State changed from EPRINT to DRD_WIPED

User Experience Enhancements

User Type (End-User, Administrator, Technical)	Area	Issue description	Reference #
End-User	Correspondence	Correspondence Letter does not display suite number from the Address 2 field	57928
End-User	Work Next- Due Date	Some faxed and STAT requests not getting Days Due & Due Date populated and therefore the requests don't display in the Work Next flow	59614
End-User	Duplicate Check	Request Letter label doesn't display under the up & down page navigation arrows on the left upper side on the Potential Dup screen	59714
End-User	Duplicate Check	Potential Dup Request Letter gives "Error! Request Letter not found" when attempting to open Request Letter for a potential request that has been delivered	55370
End-User	Fulfillment Quality Control	Work Next is not working for the Fulfillment Quality Control requests for some CSRs due to their role and privileges	58908
End-User	New Requester Team	Unable to filter by just Site	59282
End-User	New Requester Team	History missing customer ID # (shows % sign) after multiple Requesters are selected from matching screen	58970
End-User	Pop-up Search	Opening for a second time does not open window	59384
End-User	Recall Hold	Recall Hold expiration delay and won't move request to next Status: FQC, etc. Takes too much time to move to next status	57696
End-User	Rep Message	Rep Messages does not allow User to reply	47658
End-User	Request Letter	Request Letter PDF format making requests fail to move to BackOffice	56677
End-User	Request Letter	Request Letter that has had a redaction is not carried to the split child request	57165
End-User	Requester Search	Requester info displays for the previous requester not the current requester.	59412
End-User	Request Search	When searching for eID that is more than 2 billion, system, get Invalid Error	59200
End-User	Awaiting Certification	Two users can edit the same request that is in Certification, and in Approval for Delivery	51727
End-User	Customer Support	Displaying Popup error after clicking on comment icon	59016

Technical	Address cleansing	Address Cleansing by API instead of using Lawson stored proc	59514
Technical	Digital Intake performance	“Create” API divided into two components- url change: intakeServices (used to consume the Create API) and requestWorker components	59786

Appendix - Login Changes

The authentication software used to login to HealthSource changed from Okta to Microsoft Azure on 05/24/22 for Ciox users. A few highlights are listed below.

For details on login changes, see the **HealthSource Azure Changes** document and the **User Guide Azure Multi Factor Authentication (MFA) and Self-Service Password reset (SSPR)** document (reach out to Ciox IT for detailed instructions on setting up).

- You will not be able to use a security question for your second authentication method. You must use one of the following:
 - Call my authentication phone
 - Text code to my authentication phone
 - Call my office phone
 - Notify me through app
 - Use verification code from app or token.
- When you login to Microsoft first, you will not need to enter your password again when logging into HealthSource.
- You can access the HealthSource application via the app on the Microsoft My Apps page

Frequently Asked Questions

Question: Will I have to enter my email address twice to get into HealthSource?

Answer: Yes,

Question: Will I have to enter my password twice?

Answer: No, if you have authenticated on Microsoft first (Office/Teams, Outlook, etc.)

Question: Can I use a Security question as my authentication/identify method?

Answer: No, Microsoft does not offer this method

Question: I login with an email address that does not end with @cioxhealth.com. What do I do?

Answer: You can access HealthSource via <https://unity.cioxhealth.com/cipui/prelogin.html> and may login directly.