



HEALTH **SOURCE**

7.0 Release Notes

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Requester Matching and New Requester Team Changes

Note: This change will be available on Friday, November 18, 2022

There are two main areas of the Requester changes enhancement. These areas are below:

Loggers and Fulfillers – The Requester Search now uses “fuzzy search” logic instead of “like search”. The Search results now include Requesters that have multiple names, but have the same address, delivery type, and Requester ID. You should select the name and address that is a 100% **exact match** to the Request Letter. If you cannot find the exact match, submit a request to New Requester Support.

New Requester Team – The ability to manage Requesters by linking an ‘alias’ name to a ‘primary’ Requester.

Requester Search Changes

The *previous* search logic was performing a “like search”.

For example, when you entered “3005”, when you intended to enter “30005”, as the Zip Code along with address “925 North Point Parkway”, no results were found since the exact value entered was not found. Similarly, if you didn’t enter the address exactly correct, no results were found.

Zip entered:	Address entered:	Search results:
3005 (not 30005)	925 North Point Parkway	None found

Now the search logic uses a “fuzzy search”. A “fuzzy search” returns a list of results based on likely relevance. The “fuzzy search” compensates for typos and misspelled terms in the search criteria fields. The logic scans terms that have a similar composition which covers near-matches when the discrepancy is just a few misplaced characters. See the examples below for more explanation.

When you enter “3005”, when you intended to enter “30005”, in the zip code and the address "North Point Parkway", the results now include the closest matches to “3005”. The more specific data you enter in the search criteria fields, the more data will be filtered and the matches that are closest display.

Zip entered:	Address entered:	Search results:
3005 (not 30005)	North Point Parkway	Requesters with the closest match to 30005

Address example

You want to search for

Zip: 08103 Address: 2 A

You enter 08103 in the zip code and the address 2 A. The closest match to zip code 08103 and 2 A are at the top of the list; and the last 2 rows are a close match as one has 18503 and another has 1873, so as 03 and 87 are the closest match to 08103.



Select Requester

Requester #	Requester Name	Address	Major Class	Delivery Type
2216910	HUDSON TACTICS	2 AQUARIUM DR STE 300 CAMDEN NJ US-08103-1000	Insurance Company	Mail
2216910	HUDSON TACTIX	2 AQUARIUM DR STE 300 CAMDEN NJ US-08103-1000	Insurance Company	Mail
481602	SWIF INSURANCE	100 LACKAWANNA AVE SCRANTON PA US-18503	Insurance Company	Mail
2214123	GWC LAW FIRM	1 E WACKER DR STE 3800 CHICAGO IL US-60601-1813	Attorney	Mail

Alphanumeric address example

You want to search for

Zip: 08103 Address: 2 Aquarium

You enter 08103 in the zip code and the address 2 Aquarium. The closes match to zip code 08103 and 2 Aquarium are listed

Select Requester

Requester #	Requester Name	Address	Major Class	Delivery Type
2216910	HUDSON TACTICS	2 AQUARIUM DR STE 300 CAMDEN NJ US-08103-1000	Insurance Company	Mail
2216910	HUDSON TACTIX	2 AQUARIUM DR STE 300 CAMDEN NJ US-08103-1000	Insurance Company	Mail

PO Box alphanumeric

You want to search for

Zip: 60690 Address: PO BOX A3386

You enter zip code 60690 and address PO BOX A3386. The alphanumeric value will be considered, and the search results will include the closest requester which is below.

CLEARCOVER
PO BOX A3386, CHICAGO, IL, UNITED STATES
60690-3386

Note: The logic for the Ciox Requester ID field is the same and has not changed.



New Requester Team Changes

In addition to the Requester Search changes described in the previous pages, the New Requester Team users also have the following enhancements:

In the Requester Search results area, a new column, *Aliasing*, displays next to Delivery Type column. The column has either “Primary” or “Alias” to identify whether the requester is a Primary Requester or an Alias Requester as determined by the New Requester Team. Alias requesters will have the same Requester ID, Address, and Delivery Type as the Primary Requester.

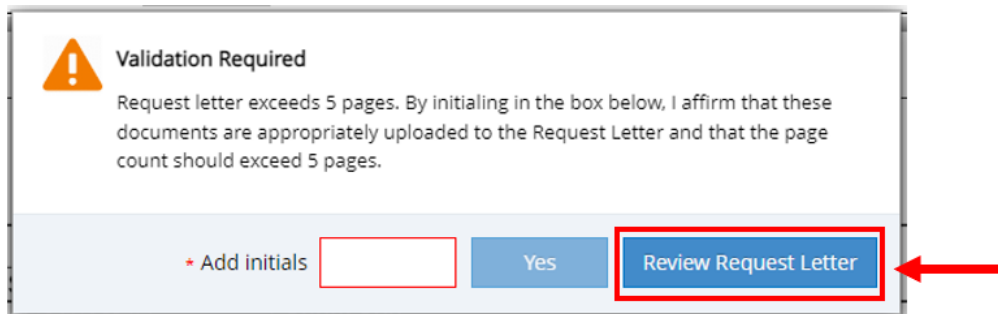
There are four new functions via the new Edit Requester button to help manage Requesters with multiple names when working a request. The New Requester Team User can...

- Mark as Primary- An Alias Requester can be marked as Primary. This does not automatically update Lawson, requires Lawson manual update by the New Requester Team
- Link to Primary- An Alias can be linked to another Primary. Lawson does not contain an alias, so no updates are done for the alias.
- Add Alias/Child- An Alias can be added to a Primary. Lawson does not contain an alias, so no updates are done for the alias.
- Remove Alias/Child- Added/Existing Alias can be deleted/removed. Lawson does not contain an alias, so no updates are done for the alias.

Note: The Edit Requester and Add New Requester function can also be accessed via the main menu.

Request Letter 5-Page Validation Change

The Request Letter “Validation Required” pop up message is modified to remove the “(X)” icon in the top right corner and add a “Review Request Letter” button at the bottom. This gives the User the ability to return to the Request Letter for analysis.



Partial Retrieval Reasons for PAYD Requests

HealthSource now displays nine additional partial retrieval reasons in fulfillment. The new reasons are mainly intended for PAYD requests and are mandatory. For non-PAYD Requests, the new reasons will be disabled. The changes are shown below.

Requested	+ Record Types	Retrieved
	<input checked="" type="checkbox"/> Allergies <input checked="" type="checkbox"/> Entire Record Add Record Type: <input type="text"/>	<input type="checkbox"/> Retrieved All <input checked="" type="checkbox"/> <input type="checkbox"/>

+ Indicate Reasons for Records Not Retrieved

- | | |
|---|---|
| <input type="checkbox"/> All Available Information Provided | <input type="checkbox"/> Not Authorized |
| <input type="checkbox"/> Retrieved by Ciox. Request Forwarded | <input type="checkbox"/> No Face to Face Visits |
| <input type="checkbox"/> Outpatient Visit Only | <input type="checkbox"/> H&P from Outside Facility |
| <input type="checkbox"/> Discharge Not Yet Available | <input type="checkbox"/> Inpatient Visit less than 48 hours |
| <input type="checkbox"/> ER Visit Only | <input type="checkbox"/> Patient Left without Being Seen |
| <input type="checkbox"/> Records under Different Name | <input type="checkbox"/> Records under Different DOB |

Comment



Note: For PAYD Partial Retrievals, it is currently still required to update the *PAYD Partial Retrieval Reasons Form* so the QA Team can accurately conduct their review. In the near-future, this manual form will no longer be required.

ATTENTION QA TEAM:

Please note that the attached medical records are EVERYTHING that are available for the **patient and date range requested**. While we found the patient,

- This was all that was available for the requested HEDIS measures.
- The records for the correct patient appear under a different name (for example: the admitting team entered the patient incorrectly in EMR; it was a trauma patient; or married name).
Patient is also known as _____.
- There are no office visits or face to face encounters.
- This was an ER visit only.
- This was an Outpatient visit only e.g. lab/radiology oncology.
- This was Inpatient visit less than 48 hours.
- H&P from outside facility.
- A discharge is not yet available (14 days from discharge for state of CA).
- The Patient left without being seen.

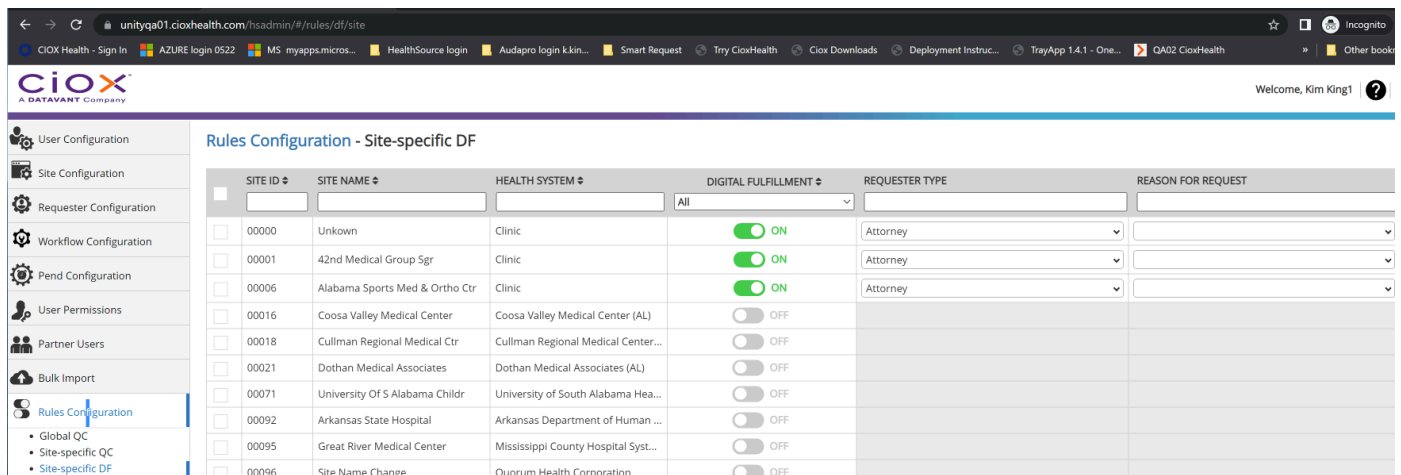
These records are hospital records. Please send this Request directly to the hospital to obtain records.

Parent Request Letter to Back Office

The pull list Parent Request Letter is now sent with the child’s Coversheet/Request Letter to the Back Office so Corpweb users can view the parent’s original Request Letter. And the Parent Request Letter is now included with the child’s Request Letter in the package delivered to the Requester.

Platform Admin - Digital Fulfillment Rules Configuration

Platform Admin Users will now be able to configure Sites for Digital Fulfillment based on Requester Type and Reason for Request.



SITE ID	SITE NAME	HEALTH SYSTEM	DIGITAL FULFILLMENT	REQUESTER TYPE	REASON FOR REQUEST
00000	Unkown	Clinic	ON	Attorney	
00001	42nd Medical Group Sgr	Clinic	ON	Attorney	
00006	Alabama Sports Med & Ortho Ctr	Clinic	ON	Attorney	
00016	Coosa Valley Medical Center	Coosa Valley Medical Center (AL)	OFF		
00018	Cullman Regional Medical Ctr	Cullman Regional Medical Center...	OFF		
00021	Dothan Medical Associates	Dothan Medical Associates (AL)	OFF		
00071	University Of S Alabama Childr	University of South Alabama Hea...	OFF		
00092	Arkansas State Hospital	Arkansas Department of Human ...	OFF		
00095	Great River Medical Center	Mississippi County Hospital Syst...	OFF		
00096	Site Name Change	Quorum Health Corporation	OFF		

Platform Admin - User Configuration Changes

Platform Admin Users will now be able to view the User’s HealthSource Role and Activity Status in the search results screen. Also, now a User can be disabled, from the default search screen instead of having to ‘open’ the User’s account. When an Inactive User is being enabled, the system directs the User to the main User account screen to assign the necessary Sites and save the information.

Before:



User Configuration

Search by First Name, Last Name, Email

Displaying 1-1 of 1

First Name	Middle Name	Last Name	Job Title	Email
Csr		Manual		csr.manual@cioxhealth.com

After:



User Configuration

Displaying 1-6 of 6

First Name	Middle Name	Last Name	HealthSource Role	Email	Status
csr		manual	CIOX Executive	csr.manual@cioxhealth.com	<input checked="" type="checkbox"/> Enabled
csr		corpsolution	CIOX Executive	csr.corpsolution@cioxhealth.com	<input checked="" type="checkbox"/> Enabled
sequence		csr	Electronic Integration	sequence.csr@cioxhealth.com	<input checked="" type="checkbox"/> Enabled
csr		Automation	Client Service Representative	csr.automation@cioxhealth.com	<input checked="" type="checkbox"/> Enabled
CSR		AutomationCamunda	Client Service Representative	csr.automationcamunda@cioxhealth.com	<input checked="" type="checkbox"/> Enabled
svc		csr	Client Service Representative	svc_csr_qa@cioxapps-dev.com	<input checked="" type="checkbox"/> Enabled

User Experience & Technical Enhancements

User Type (End-User, Administrator, Technical)	Area	Problem/Error Solution implemented/amended behavior	Reference #
End-User	HCA - Escalation	Remove Escalation button is disabled in the pop out Search when the request is in 'Awaiting Delivery Approval', or 'Certification' and the request has been escalated	63983
End- User	History events	Event description needs to wrap so it won't cause horizontal scrolling for the User	60956
End-User	MTQ & Cert	Certification on the requests after the MTQ period will now move to back office without being stuck	55952
End-User	Pop-out Search, Work Next	Request Search was not clearing the information of the previous request opened.	64520
End-User	Record Types Retrieved	De-selection of 'Retrieve All ' now updates upon Save & Close on the Request screen	63684
End-User	Request submission with no documents	Cache clearing process has been modified to prevent the User to submit requests without documents	64704
Administrator	Platform Admin, Digital Fulfillment Rules Configuration	New function for Sites to be configured for Digital Fulfillment per Requester Type and Reason for Requester	64591
Administrator	Platform Admin, User Configuration	Additional columns, Status and email, and the ability to change the User's Status have been added to the User search results.	64220
Administrator	User Management, Group Admin function	User provisioning failures are now resolved when using Edge when adding User from HS User Management, Group Admin	63226
Technical	Medical Record Page Count	Page Count mismatch when a second file is attached: large files greater than 100 MB and less than 5000 pages are experiencing incorrect split issues. The threshold for the page count split is now revised from 5000 pages to 2000 pages in the database.	64465
Technical	Record Hub	Existing Invoice RSP Service query is modified to include the Invoice Date attribute in the Invoice API.	64185
Technical	Open request flag	Open request flag will update now correctly for Pull list complete/split complete & stat fax requests	63659
Technical	Swellbox & Chart Finder	Swellbox patient requests are not going to HealthSource when the Digital Flag is off; and Chart Finder needs Swellbox to be an "Internal" User. Changed Swellbox to be an internal application, "Patient Portal".	64553