



HealthSource

5.12 Release Notes

Release Date: April 8, 2022



Document revision history

Publication Date: 04/01/2022

Document Edition version: 1.1

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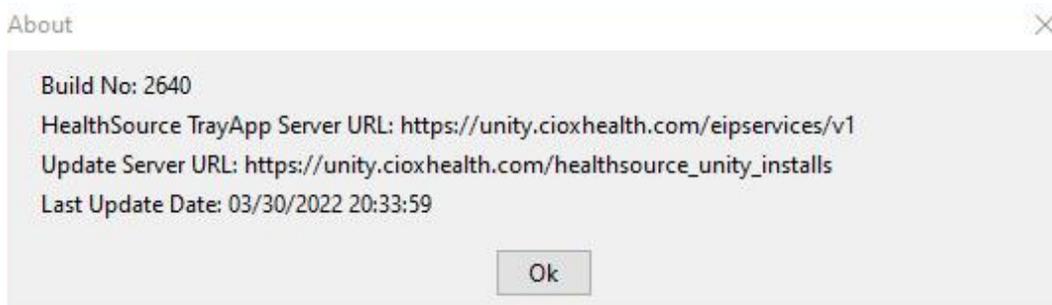
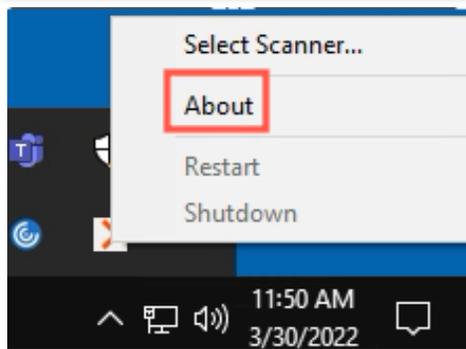
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TrayApp Auto Update v2640

A new TrayApp is available for Release 5.12 and contains an update to the SSL Certification. This TrayApp is a required step for the Print2Q (asynchronous printing) feature that will be available soon.

The TrayApp will automatically update upon HealthSource login for most users, with or without Administrator access/permissions. Users can continue to use the prior TrayApp, version 2630, temporarily if the auto update fails.

A successful TrayApp auto update will have the following in the Microsoft Windows Taskbar System Tray when clicking on the Trayapp icon.



For instructions for users to continue working with the current TrayApp, and how to manually update the TrayApp, refer to the Healthsource 5.12 TrayApp Job Aid.



Important: Installation of the TrayApp will be required by **April 22, 2022**. Please work with the Ciox Solutions Center, or your IT department to have the new TrayApp installed.

Frequently Asked Questions – TrayApp Auto Update

Q: Do we need to uninstall all components of the HS TrayApp?

A: No. Do not uninstall the prerequisites. There are no changes to this file. The files that are being updated are located at C:\HealthSource-Unity

Q: What is the best way to uninstall the current TrayApp?

A: Navigate to and double click on C:\HealthSource-Unity\HealthSource-Unity-TrayApp-uninstall

Q: How many files are needed to be installed?

A: Only one. Using IE or Edge go to download.cioxhealth.com/unity.html You will only be using file #2 - HealthSource TrayApp Installation. Do NOT use the MSI package.

Q: After the Trayapp re-install, user is having issues staying connected to the TrayApp. What can we do?

A: Have user log out of HealthSource. Shutdown the TrayApp. Navigate to and delete folder C:\Users\[user name]\.unity-trayapp Clear history, cache, and cookies for 'all time'. Restart computer. If further assistance needed, please contact Ciox IT, 877-358-6939.

Q: How much time do we have to complete the update?

A: 2 weeks- April 21, 2022. Users will still be able to use HealthSource if the automated update fails.

Q: Does the master image need to be updated for VDI users?

A: Yes, unless there are persistent VDI connections.

Q: Can the TrayApp update be pushed to computers?

A: Yes.

Performance Trending (Phase 1)

HealthSource is introducing a new feature for you to see your productivity. This feature automatically counts your logging, fulfillment and correspondence submissions performed during the day, so you know how many you have completed at any point in the day. You can see your and your team’s productivity numbers in a trend chart for the previous eight calendar days.

For loggers in Phase 1, the daily goal is an additional 10%.

For fulfillers in Phase 1, the daily goal is a standardized, forecasted 10% increase in your MAP (Mixed Adjustment Production) over your actuals for the past 90 days. This value comes from historical trends where we see a correlated uptick in MAP to audit output.

MAP factors and new visuals are explained below.

Three donut charts (ring with colored shading) display in the top ‘header’ of the HealthSource screens for the following HealthSource User Roles

- Logger Centralized
- Logger Centralized Supervisor
- Client Service Representative
- Group Administrator

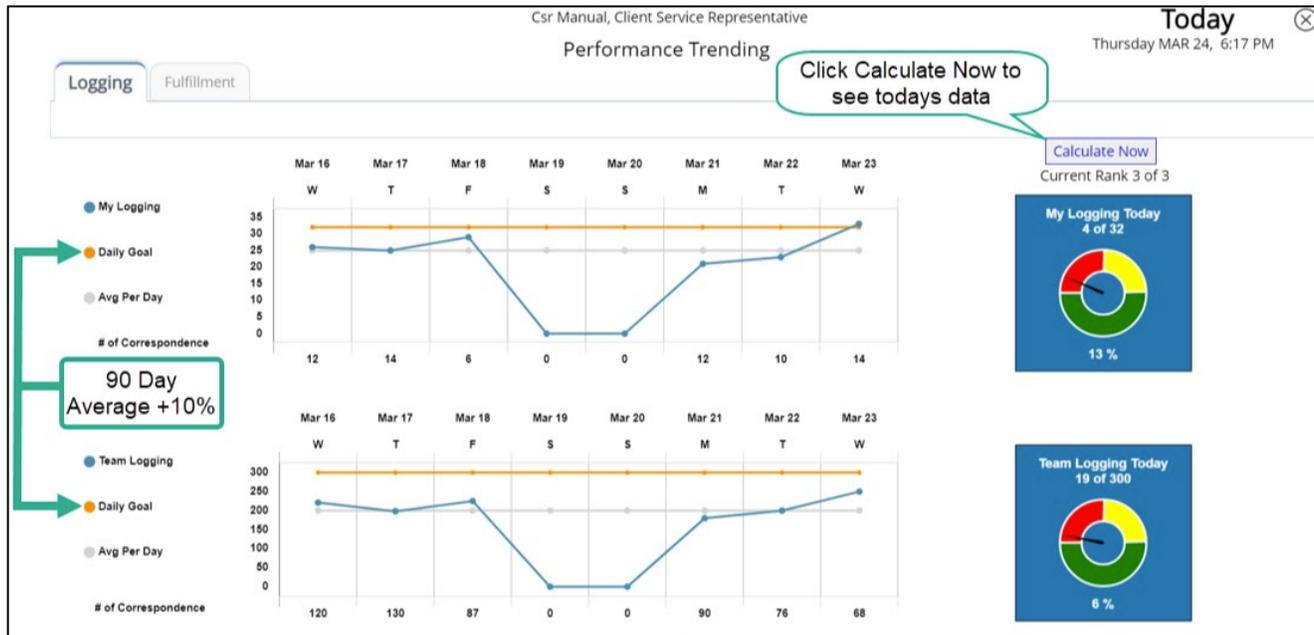


- These tasks update the logging performance numbers:
 - Logged requests
 - Corresponded requests
 - STAT bulk requests
- These tasks update the fulfillment performance numbers:
 - Fulfilled requests
 - Corresponded requests
 - ‘Express ROI’ requests (Submit and Fulfill from the Submit button dropdown)
 - STAT bulk requests

Click a donut to open the new Performance Trending window.

The Performance Trending window opens with two tabs - Logging and Fulfillment. The Logging tab automatically opens when the Logging donut is clicked.

The Fulfillment tab automatically opens when the Fulfillment donut is clicked.



Trend charts

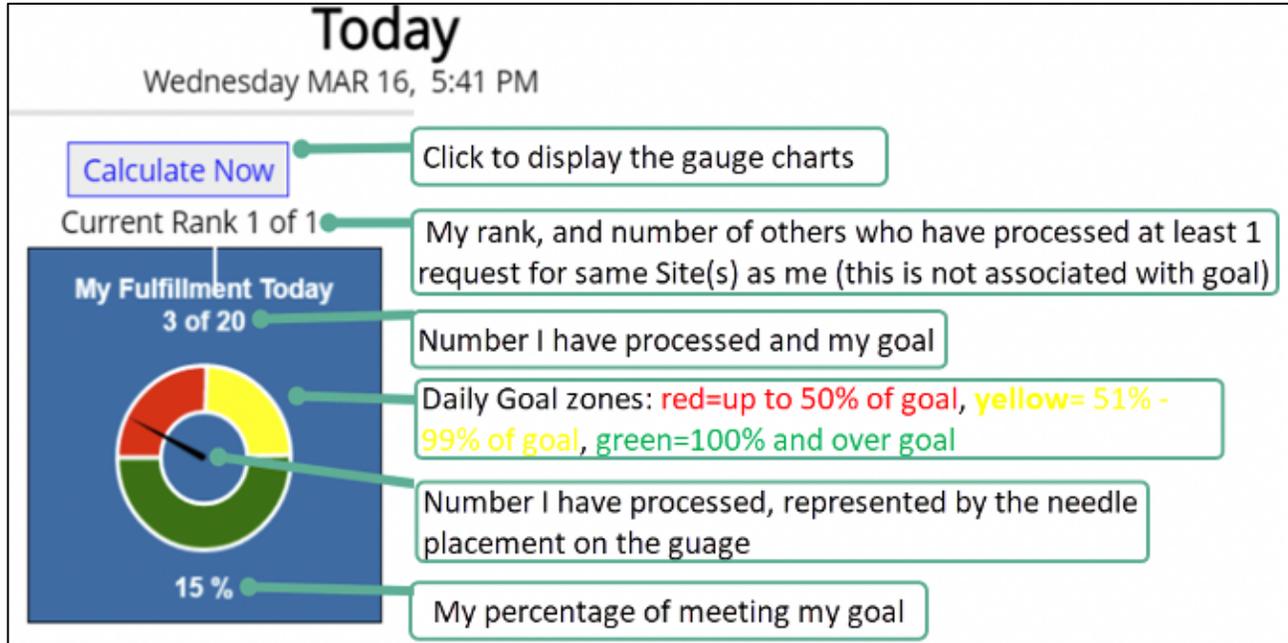
Two trend charts display for your and your team’s completed work for the previous 8 calendar days. When you move the cursor over the point on the line, the number represented displays.

The ‘team’ consists of users who have *site access* to site(s) that you also have *site access* to. This is called ‘like site access’ or ‘shared sites’. For example, if you and another person are the only users who log for Site 12345, then you two are in the team together. If another person starts logging for Site 12345, then the three of you are in the team together.

- ‘My Logging’ and ‘Team Logging’ lines represent the **total number of requests completed** by you and your team
- “Daily Goal” lines represent the **average number of requests completed** within the past 90 days *plus* a 10% increase by you and your team. For example, if the average number of requests completed in the last 90 days is 30 requests, add 10% of 30 to get a goal of 33 requests per day.
- *Avg Per Day* lines represent the sum of all the requests completed by you divided by the number of ‘active’ days within the past 90 days. For the Team Graph, the sum of all requests completed by users that have ‘like site access’ divided by the number of ‘active’ days within the past 90 days.

Gauge charts

Click the **Calculate Now** button to see **today's** data in the blue gauge charts, one for you and one for your team.



MAP (Mixed Adjusted Performance factors)

For CSRs and Processors, for each request completed, the table below is used based on the Major Class/Requester Class for the request.

Major Class/Requester Class...	is multiplied by...
ATTY/Attorney	4
CLIN/Continuing Care	1.5
COPY/Attorney	2
COPY/Insurance	2
DVNT/Datavant	1.5
FAC/Facility	1.5
GOV/Government	1.5
INS/Insurance	1.5
PAT/Patient	2
PAYD/PAYD	1
PAYI/PAYI	1
PRO/PRO	2

Performance Trending Frequently Asked Questions

Question: I do not see the entire visual and part of it does not display (donuts, charts, button)

Answer: *The best display resolution is the standard HDMI 1920 x 1080 with scaling of 150%.*

Question: I upload Radiology images all day because I am the only one who has access to the Radiology system. I do not fulfil requests. Will I see my donut count increase?

Answer: *In a future phase this will be added.*

Question: Floaters work on various sites and on various tasks where help is needed. The daily goal will not be realistic for me since I do not do the same tasks daily. Will the goal change?

Answer: *In a future phase this will be modified.*

Question: Certifications are not included in my donut counts. Why not?

Answer: *In a future phase this will be added.*

Question: Supervisors need to see the team's current and trend performance data during the day. How do I see?

Answer: *You will not be able to see the data unless you have performed one of the tasks that are used to update the data for the sites you want to see. There will be reports for Supervisors and Managers in a future phase. If you have performed a task, click a donut. The trend data for the previous 8 days is displayed in the bottom graph chart. Click the Calculate Now button. Current up-to-date data displays on the right side of the screen. The Team Logging Today chart shows the count logged for the team, and the daily goal number.*

Question: Logging donut count did not increase after I logged and submitted a request.

Answer: *The Logging donut number is **not** increased when a request is logged and fulfilled using the (Submit and Fulfill option from the Submit button dropdown) (aka express roi). Only the Fulfillment donut is increased.*

Question: Pull List did not increase my Logging donut, why not?

Answer: *Pull List parent requests do not update the Logging donut. Pull List child requests logged increase the Logging donut. Pull List parent requests that are logged and/or fulfilled do not increase the donuts.*

Question: I only log. Why do I have a Fulfillment and MAP donuts when I only log?

Answer: *In a future phase this will be adjusted.*

Question: I only fulfill/process. Why do I have a Logging donut when I only process?

Answer: *In a future phase this may be adjusted.*

Question: MAP and OMAP. What are they?

Answer: *These are abbreviations of specific metrics that we use for Fulfillers/Processers.*

MAP, Mixed Adjusted Production

OMAP, Operation Mixed Adjusted Production

The new feature uses MAP only currently. OMAP is a metric that includes your hours worked, combined with your productivity- it is not used currently. Continue to use the Daily OMAP report and the OMAP tracker.

Question: Rank. What does it mean?

Answer: The first number represents the 'position' of your work today (your donut count) compared to other's work done today. This number is based on the requests you have done today, AND requests that others have done today on the same site(s) that you have worked on.

The second number represents the position and total number of users who have worked on the same sites as you today. Note: The other users must have worked at least one request today to be included in the calculation.

Question: Transmission failed- Medical Record was not transmitted. Is my donut count updated for the submission?

Answer: Yes, the fulfillment count is increased even when a failure occurs.

Question: How are logging and fulfillment counts calculated?

Answer:

1. My Logging:
 - a. Logging submit task
 - b. Logging correspondence submit task
 - c. Stat batch submit task
2. My Fulfillment:
 - a. Fulfillment submit task
 - b. Express ROI submit task
 - c. Fulfillment correspondence submit task
 - d. Stat batch submit task

Question: How often are the volumes updated?

Answer:

1. Donuts on HealthSource screens
 - a. Each time a user completes the tasks from above, the respective donut volume will be updated
 - b. User can click the refresh button if the updated timestamp is not the current time
2. Performance Trend Graph
 - a. The Performance Trend graph is updated daily (left side)
 - b. Today's gauge chart is updated anytime "calculate now" is clicked (right side)

Question: How are the daily average & goal calculated?

Answer:

1. My daily average:
 - a. We sum all requests completed over the last 90 days and divide by the number of active days within the 90-day period.
2. Team daily average:
 - a. We sum all requests completed for all users that have like site access over the last 90 days and divide by the number of active days within the 90-day period.
3. My daily goal:
 - a. Daily average with a 10% increase
4. Team daily goal:

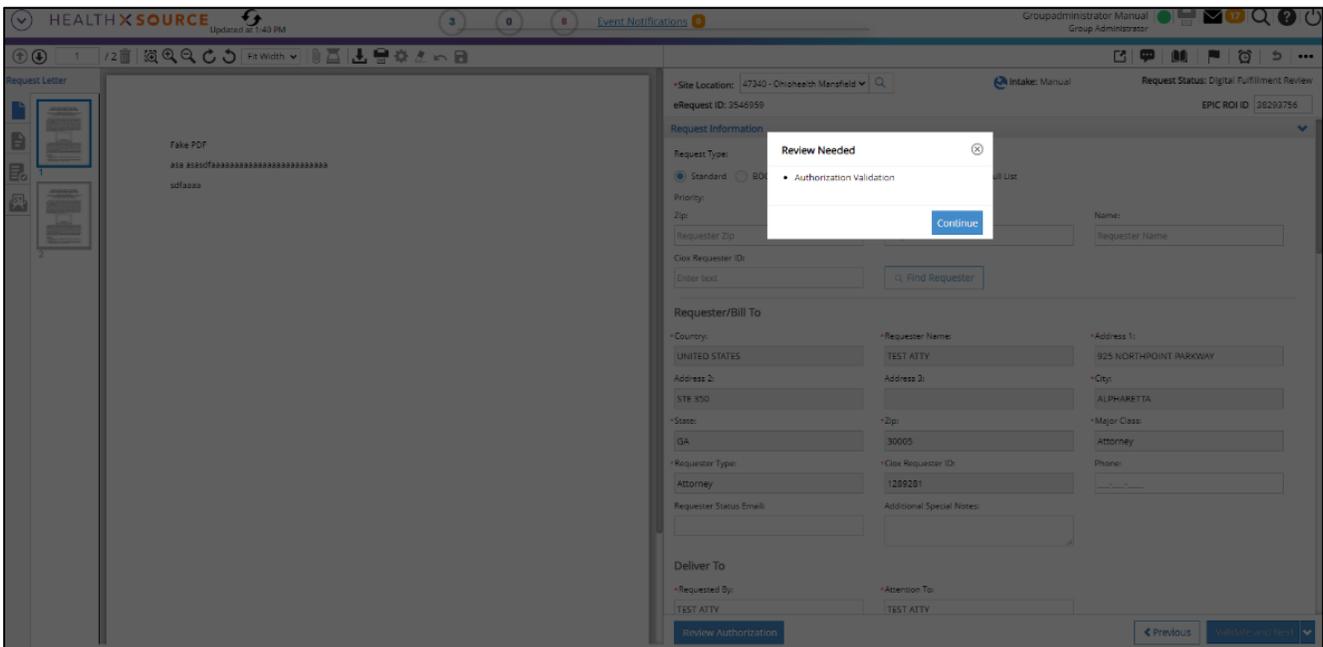
a. Team daily average with a 10% increase

Question: How can the daily goal be adjusted? **Answer:** A phase in the future will allow us to scale goal adjustments. For now, we will use the goal provided and take time to process the data and feedback we have. We will not allow goal adjustments until we have a process to intake the changes and process them quickly.

Authorization Validation for Digital Fulfillment

Healthsource is introducing a new workflow status called ‘Digital Fulfillment Review’ that will be available for Digital Fulfillment eligible requests. This request status will be leveraged to allow for a manual validation that an authorization has been provided by the patient to release their records.

When a user opens a request in Digital Fulfillment Review, they will be notified that an Authorization Validation is required.



Upon clicking ‘Continue’, user will need to validate that the request letter provides the patient authorization to release their records. Once the user has reviewed, user will need to click the ‘Review Authorization’ button in the bottom ribbon of the screen and a validation popup will appear.

Site Location: 47340 - Ohiohealth Mansfield Intake: Manual Request Status: Digital Fulfillment Review
 eRequest ID: 3546959 EPIC ROI ID: 38293756

Request Information

Request Type:
 Standard BOC Continuity of Care Patient DDS Pull List

Priority:
 Zip: Address: Name:
 Requester Zip Requester Address Requester Name

Ciox Requester ID:

Requester/Bill To

*Country: <input type="text" value="UNITED STATES"/>	*Requester Name: <input type="text" value="TEST ATTY"/>	*Address 1: <input type="text" value="925 NORTHPOINT PARKWAY"/>
Address 2: <input type="text" value="STE 350"/>	Address 3: <input type="text"/>	*City: <input type="text" value="ALPHARETTA"/>
*State: <input type="text" value="GA"/>	*Zip: <input type="text" value="30005"/>	*Major Class: <input type="text" value="Attorney"/>
*Requester Type: <input type="text" value="Attorney"/>	*Ciox Requester ID: <input type="text" value="1289281"/>	Phone: <input type="text"/>
Requester Status Email: <input type="text"/>	Additional Special Notes: <input type="text"/>	

Deliver To

*Requested By: *Attention To:

Authorization Validation ✕

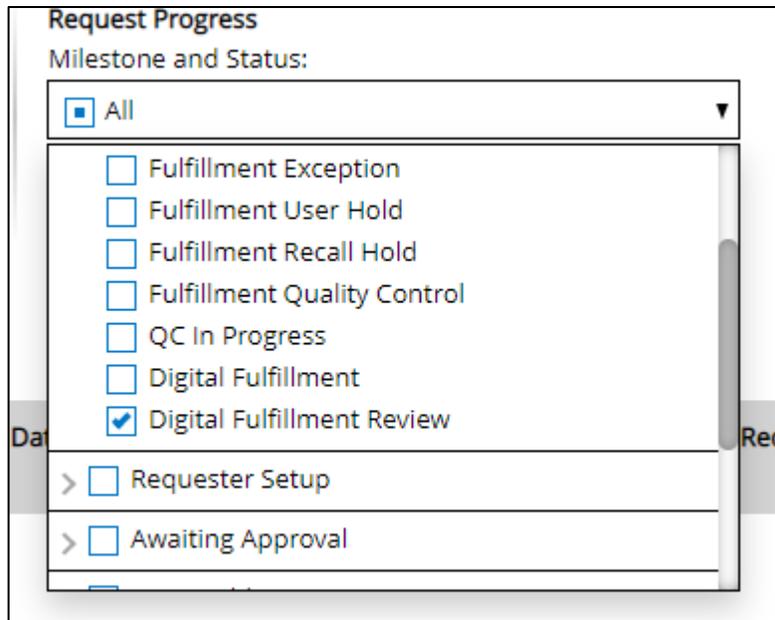
By clicking Approve option below, I validate that the information captured is authorized and correct.

Add Initials

User will be required to either Deny or Approve that the authorization has been provided. In order to approve, user will need to input their initials. User may also deny that an authorization has been provided.

Once, the approve or deny decision has been provided, the ‘Validate and Next/Close’ button will become enabled. If authorization was not provided and denied, the request will be routed to Ready to Fulfill for manual fulfillment. If authorization was validated and approved, the request will be routed to the Digital Fulfillment rules engine to check once more for Digital Fulfillment eligibility.

Users will also have the ability to search and Work Next from this workflow state by searching in the search screen for the Digital Fulfillment Review workflow status.



Datavant Major Class added

A new Major Class Code (DVNT) and description (Datavant), and Requester Type (Datavant), have been added to HealthSource, back office, Lawson, and reporting. The new Major Class is used for requests submitted on behalf of the Datavant team. These requests are sent to HealthSource electronically through the standard API that is already used by ChartFinder.

These requests have a Ready to Fulfill status and are processed like other electronic requests that request the entire record, except for the following:

- you cannot change the Requester
- you cannot resubmit to logging

These requests will have a Primary Reason for Request of “Life Sciences”. There is no corresponding secondary reason.

The Due Date is typically sent with the electronic request, however, if it is not sent then 10 business days will be applied.

Note: Existing active Datavant requests (entered before this release, and before back office) will be automatically changed from the Major Class of PAYD to DVNT (Datavant) and the Reason of Request of “Ciox Real World Data” to “Life Sciences”.

See the screens below for changes to accommodate the new major class

Request Characteristics
Type and Requester Class:

All

Standard

- Attorney
- Datavant
- Facility
- Government
- Insurance
- PAYD
- PAYI
- PRO

Request Reason:

All

Datavant

- Life Sciences

Unassigned

STAT/ Priority	Site ID	eRequest ID	Group ID	Requester Name	Requester Class
<input type="checkbox"/>	20080 - Dmc Ou...	11112076		ECS MMRF ONDEMAND	Datavant

Requester/Bill To

*Country: UNITED STATES

*Requester Name: ECS MMRF ONDEMAND

*Address 1: 15458 N 28TH AVENUE

Address 2:

Address 3:

*City: PHOENIX

*State: AZ

*Zip: 85053

*Major Class: **Datavant**

Requester Type: **Datavant**

*Ciox Requester ID: 2041833

Phone:

*Major Class field displays the description, Datavant, associated with DVNT Major Class Code.

Request History

eRequest ID: 11111920 Site: 20080

Log ID: 139602375 Request Status: Ready to Fulfill

Date	User Name	Event Description
	Automation	
03/24/2022 03:16 AM	Electronicinteg Automation	Electronic Intake-Due date provided: 03/27/2022.
03/24/2022 03:16 AM	Electronicinteg Automation	Electronic Intake-Reason for Request provided : LIFE_SCIENCES
03/24/2022 03:16 AM	Electronicinteg Automation	Customer Lookup done. Bill Address: 15458 N 28TH AVENUE, PHOENIX, AZ, USA-85053. Requester Found. Selected requester: ECS MMRF ONDEMAND. Requester ID: 2041833. Preferred Delivery Method for the Requester: Electronic
03/24/2022 03:16 AM	Electronicinteg Automation	Provided Record Set is not available
03/24/2022 03:16 AM	Electronicinteg Automation	Electronic Intake. Patient Information: First Name: fnaLCFq, Last name: Inzosej, DOB: 01/01/2001. PatientIdentifiers: chartid - 123456789, Chart Id - 1234567, mrn - 123456789
03/24/2022 03:16 AM	Electronicinteg Automation	Electronic Intake. Requester Information: Customer ID: 2041833. Shipping Address: 15458 N 28TH AVENUE, PHOENIX, AZ, UNITED STATES- 85053. Attention-To: AutomatedTest. Requested By: ECS MMRF ONDEMAND.

Priority Level (Phase 1)

HealthSource is introducing a new feature ‘Priority’ to process requests in the order of the priority level assigned to the requests. This assignment is available only to certain escalated users of HealthSource.

Only specific projects will use this in phase 1.

Priority cannot be used by Partner sites.

Set Priority

Total items displayed - 1000

All	STAT/	Site ID	eRequest ID	Group ID	Requester Name	Requester Class	Patient Name	DOB	Intake Date
<input checked="" type="checkbox"/>	Priority	13565 - Mmpg Ur...	3538982		SILVER SCRIPT INSUIRA...	Insurance	Kim tray app large fil...	01/01/2000	09/21/202
<input type="checkbox"/>		39750 - Hoopesto...	3539002		Demo Test	Attorney	Chris Evans	02/03/1983	10/13/202

The requests assigned a priority level will get processed after STATs, but before the Due Date. Priority level can be set up with values of 1-5, with 1 being the highest priority. The work next button will show the requests according to the new priority sort order of STAT, Priority 1, Priority 2, Priority 3, Priority 4, Priority 5, Due Date, and FIFO.

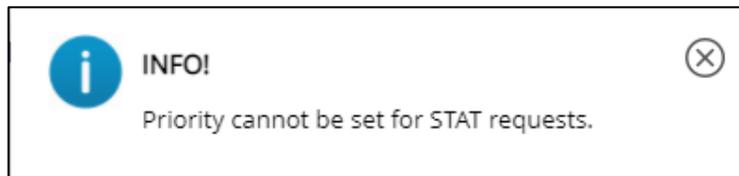
A Priority filter field has been added to the Search Criteria in the expanded field section.

Priority Level:

All

None
 1
 2
 3
 4
 5

STAT requests cannot be assigned a priority, but a prioritized Continuity of Care, COC, request can be changed to a STAT. The request *cannot* be a STAT *and* have a Priority at the same time. The system will show a warning pop when attempting to assign a priority for a STAT request.



The Pull List parent’s priority transfers the priority assigned to the child requests if the child requests are in an active state. A priority cannot be assigned for individual child requests.

Request Audit history displays all changes made to priority values.

Request History		
Date ↕	User Name	Event Description
03/19/2022 09:29 AM	Kim King 1	Priority level set as 2 Comments :set prioirty level to 2 on sat 3/19.

Production Defect Resolutions

- **Indirect Chase Upload Is Creating Duplicate eRequest IDs**

Sometimes, the same file is being processed by multiple pods in the backend and creating new erequests for records. Additional logic was added to check whether erequests are created for the same file already and thereby preventing duplicate request creation.

- **Pull List parent creating duplicate requests by allowing 2 users to work on the same request**

The Pull List parent request was getting opened and worked by 2 different users, thereby generating lot of duplicate Pull List Child erequest_ids. Now, when clicking on the 'Continue' button, the request is assigned to the first user therefore the second user cannot edit the same parent request, via work next or the request search.

- **Humana – Pull List continue button**

The 'Continue' button on the Pull List Parent request was disabled for Humana upon Save and Close. This prevented the competition of Pull Lists. Now, the Pull List Continue works.