HealthSource Clarity

5.7 Release Notes
Release on December 3, 2021

Document History

Publication Date : 11/29/2021
Document Edition version : v 1.3

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See the following sections for detailed information on the changes for this release.

Features

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Request Search New Window (pop-out search)

You can now open another request when you are in a request. It's easy!

Just click the pop-out icon while you are in a request, or from the left menu, and a new window automatically opens.

You can…

- Drag the window and drag the border to resize

- Search for requests & view requests in read-only mode

- Add Comments

The new pop-out window will close when you log out or when the inactivity period has expired for HealthSource.

Subpoena Motion to Quash (MTQ) Auto Release

Subpoena requests have a Satisfactory Assurance period that must be honored before the request can be fulfilled.

Satisfactory assurance is a written statement from the requesting party that demonstrates that the requesting party made a good faith effort to give the patient or the patient's attorney written notice of the request for PHI. It must include sufficient information about the legal proceeding to permit the patient to raise objections and assure that the deadline for the patient's objections has passed without objections or any objections have been resolved.

Types of satisfactory assurance that can be accepted: letter, qualified protective order, valid authorization, certificate of service.

The MTQ Auto Release feature helps to reduce the manual steps of managing the request during the Satisfactory Assurance period. Using this feature ensures the records will not be released prior to the Satisfactory Assurance period (MTQ Hold period).

The new field is optional to use but recommended to minimize the manual reminders and tracking.

You can enter a date to automatically release Subpoena requests that have been processed. During logging use the new field, **MTQ Hold Date**, to type or pick a date in the future. The field will only show when there is a primary or secondary reason with the word "subpoena".

*Primary Reason for Request:	*Secondary Reason for Request:
Attorney ∨	Defense Subpoena ∨

MTQ Hold Date: ⓘ

mm/dd/yyyy 📅

What happens next?

- The request Days Due & Due Date fields are automatically updated with the MTQ Hold Date. If the Due Date is on a holiday or weekend, the next Ciox business day is selected. (You can override the Days Due and Due Date to any value.)

- Upon fulfillment submission, the request goes through the normal workflow steps where applicable (e.g., Fulfillment QA, Certification) and will eventually go to the new MTQ Hold status

- When the MTQ Hold Date is met, the request will be automatically released the next day at 8:00 pm ET.

- From the MTQ Hold state you can return to fulfillment or cancel the request

- You can search for requests using the new Milestone **MTQ Hold,** and/or the new **MTQ Hold Period** located in the expanded criteria screen.

Request Progress

Milestone and Status:

☑ All ▼

> ☐ Logging
> ☐ Fulfillment
> ☐ Requester Setup
> ☐ Awaiting Approval
> ☑ MTQ Hold
> ☐ Packaging
> ☐ Delivery

MTQ Hold Period:

☑ All

☑ 0-1 Days
☑ 2-3 Days
☑ 4-6 Days
☑ 7 Days +

The time periods above allow filtering for just the Requests that have a MTQ Hold Date in a specific time period. For example, if you want to see the Requests that have a MTQ Hold Date in the next 5 calendar days, select '4-6 Days'.

Note:

- The MTQ hold period is counted in calendar days.
- MTQ hold can be used for Requests for Production of Documents.

Marquee Zoom

You can now enlarge or zoom a specific portion of a document for a closer view on both the **main screen (viewer)** and on the Edit window.
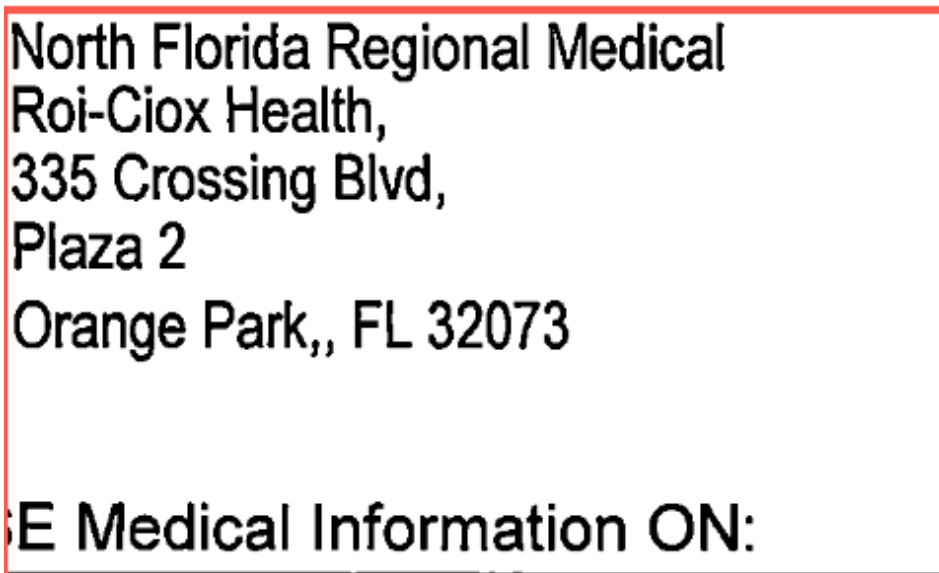
It's simple! Just click the Marquee Zoom icon for the Request Letter or Medical Record.

A magnifying glass appears on the document. Put your mouse near the section you want to enlarge. Left click and drag the mouse to select a section of text you want to zoom and then release the mouse.
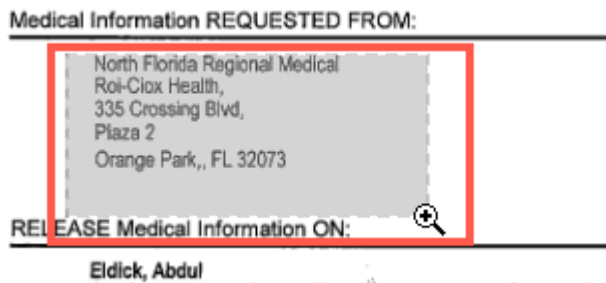
The selected section will now be enlarged.

The moment you click on the icon, the icon changes to a FIT Icon. The marquee zoom percentage increase will apply to all pages in the document. Once you are done with marquee zoom, you can click on the FIT Icon and return to the regular viewing mode.

Notes:

- When selecting a very wide horizontal area (from the left margin to the right margin) the system is not able to enlarge and will reduce the size instead. You can click on the right arrow to collapse the right panel and enlarge the viewing area and try again. This is a known issue.

- Marquee Zoom will not function using Internet Explorer browser for Ready to Log or Ready to Fulfill requests.