



# HealthSource Clarity

## 5.9 Release Notes

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## **Contact Information**

Ciox Health

120 Bluegrass Valley Parkway

Alpharetta, GA 30005

Customer Care Phone Number: 877-358-6939

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# HealthSource Clarity 5.9 Release Notes

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

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## Recall Request

There are scenarios when a request is submitted and needs to be corrected to avoid an Unauthorized Disclosure (UAD). You are now able to Recall a fulfilled request immediately after it has been submitted so you can correct the problem.

The new Recall feature can be used within the 30 minute ‘window’ after the request is fulfilled. The system automatically holds all requests except Continuity of Care in a temporary hold queue to give you time to recall. If the request is not recalled, then the request moves to the next state in the workflow, i.e. Fulfillment QC, Back Office, etc.

A new icon displays beside the History icon on the Search results screen. Requests in the temporary Hold queue have a Status of Fulfillment Recall Hold.

STAT	Site ID	eRequest ID	Group ID	Requester Name	Requester Class	Patient Name	DOB	Intake Date	Facility Rcvd Date	Days Due	Request Status
<input checked="" type="checkbox"/>	35650 - Con...	3541816		HUPY AND ABRAH...	Attorney	kim king	01/01/1997	01/14/2022 ...	01/14/2022	5	Fulfillment Recall...

To recall click the box next to the request and then click the new icon. Or from inside the request, click the new icon in the upper right. The new Recall window allows free text comments and requires a reason.

Recall To Fulfillment Pending
⊗

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**\*Recall Reason**

-- Select Reason --

Comments: (Max 1000 Characters)

Recall Request

When you recall, select one of the four Pend reasons that most closely describes why you are recalling the request. For example, the request does not contain the proper Authorization needed to release medical records.

Recall Pend Reasons	Use this when...
Recall Authorization	Use this reason when there is no authorization, or the authorization provided does not allow for the attached records to be released. i.e. Any and all records were attached, and authorization permits only a date range, wrong person signed authorization, or required authorization not attached.
Recall Documents or DOS	Use this reason when a document or date of service (DOS) has been included that should not have been OR if you failed to attach a document or DOS that should be included
Recall Requester Info	Use this reason when the request may have been disclosed to an incorrect requester or address.
Recall Wrong Patient Info	Use this reason when the patient records scanned do not match the patient's records being requested

When the request is recalled, the Status is automatically changed to Pending with the reason selected. The request can be opened so you can change what needs to be corrected.

The History screen is updated when the submitted Request is sent to Recall Hold and when the request is recalled.

Date ↕	User Name	Event Description
01/14/2022 02:24 PM	System Auto	Request state changed from Processing-Fulfillment Recall Hold to Processing-FulfillmentPend
01/14/2022 02:24 PM	Kim King 1	Request marked as Fulfillment Pend with reason: Recall Requester Info and Comment: Fixing suite number
01/14/2022 02:24 PM	Kim King 1	Fulfillment Recall Hold request fetched
01/14/2022 02:15 PM	Kim King 1	Request sent to Fulfillment Recall Hold
01/14/2022 02:15 PM	System Auto	Request state changed from Processing-FulfillmentTransmission to Processing-Fulfillment Recall Hold
01/14/2022 02:15 PM	Kim King 1	Request submitted with 2 potential issue(s) found by Verify in Fulfillment
01/14/2022 02:15 PM	Kim King 1	Fulfillment request submitted

**Notes:**

- The Recall feature can be used for requests created after Release 5.9 has been deployed.
- Requests that are fulfilled by the BOT/Digital Fulfillment are not placed on Recall Hold and cannot be recalled.

## Correspondence – Unapproved Delivery Application Reasons/Letters

There are two new Correspondence reason/letters:

- Delivery to an Unapproved Application offering alternative method
- Delivery to an Unapproved Application offering alternative method declined

An increasing number of requesters are wanting their medical records delivered by alternative methods to print/mail, and email delivery via Ciox Health's portal, especially to 3rd party portals and applications. Not only does Ciox endeavor to deliver records timely, but also using only the most confidential methods possible. To ensure the confidentiality of medical records after they are released, Ciox will only release medical records in ways that are vetted, HIPAA compliant and approved by our customers. The ultimate decision to release records to alternative applications rests with our customers.

Please work with your manager if you have questions about when to use these new reasons.

The reasons display in the combined list of Correspondence reasons as seen below.

- Delivery to an Unapproved Application offering alternative method ⓘ
- Delivery to an Unapproved Application offering alternative method declined ⓘ



**Delivery to an Unapproved Application offering alternative method**

Our facility strives to process all requests for health information in a professional and timely manner. Additionally, we endeavor to deliver your record in the manner in which you requested it.

We are in receipt of your request for medical records and see that you requested records be delivered to an application which has been reviewed by our facility. We regret to inform you that we're unable to fulfill your request in the form/format requested due to one of the following reasons:

- API does not securely interface with our system.
- Our electronic medical record does not provide this information to portal(s).
- Our electronic medical record does not enable us to segregate out records for a certain provider from a treatment record.

We are pleased to offer an alternative method of delivery. We can release this information using the following media: USB or CD/DVD. Other options may be available, so please contact the Health Information Management department at the facility for further discussion.

Please re-submit your request to the facility with the requested information in order to have your request processed.

**Delivery to an Unapproved Application offering alternative method declined**

Our facility strives to process all requests for health information in a professional and timely manner. Additionally, we endeavor to deliver your record in the manner in which you requested it.

We are in receipt of your request for medical records and see that you requested records be delivered to an application which has been reviewed by our facility. We regret to inform you that we're unable to fulfill your request in the form/format requested due to one of the following reasons:

- API does not securely interface with our system.
- Our electronic medical record does not provide this information to portal(s).
- Our electronic medical record does not enable us to segregate out records for a certain provider from a treatment record.

Per our conversation, we understand that you do not want your records delivered through any other alternative delivery method; therefore, we are unable to fulfill your request at this time. Should you have any questions, please contact the Health Information Management department at the facility for further discussion.

Please re-submit your request to the facility with the requested information in order to have your request processed.



## Correspondence – Request Expiration Date reasons combined

The Reason, Request Expiration Date Missing, has been removed since you can use the existing Request Expiration Needed.

## Correspondence – Ciox blank Authorization form

The Authorization form that is automatically sent with certain Correspondence letters pertaining to inadequate Authorizations has been revised to include another type of highly sensitive information, Genetic testing.

## Marquee Zoom for IE browser

The Marquee Zoom feature has been added for enlarging sections of documents (Request Letter, Miscellaneous Documents, Medical Record) when using the Internet Explorer version 11 browser. This functionality was released in previous versions for Chrome, Edge, and Chromium.

## Digital Fulfillment Pend workflow

### **Digital Fulfillment Pend workflow for Digital Fulfillment submission failures**

Requests that fail submission from Digital Fulfillment will be routed to Fulfillment Pending by the system with a Pending Reason – Digital Fulfillment Exceptions. Requests landing into this queue will generally have Medical Records attached and will require a user to resolve the missing mandatory field to complete Fulfillment submission. Generally, this will be a single field but at times could be more.

## Fixes

- Due Dates are now being assigned for the Sites that weren't getting the Due Date automatically updated by the system. (49158)
- Delivered Requests that were stuck in "Sent for Processing" (108) has been fixed. (49537)
- When one User is logging a request, and another User has the same Request open using the Request Search New Window from the left menu, now only the first User will be able to edit. The second user will be in read-only mode. (53794)
- The "More" icon should not be enabled when using the Add New Request Search New Window when the request is in the Awaiting Delivery Approval status. (52984)