



HealthSource Clarity Dashboards and Reports

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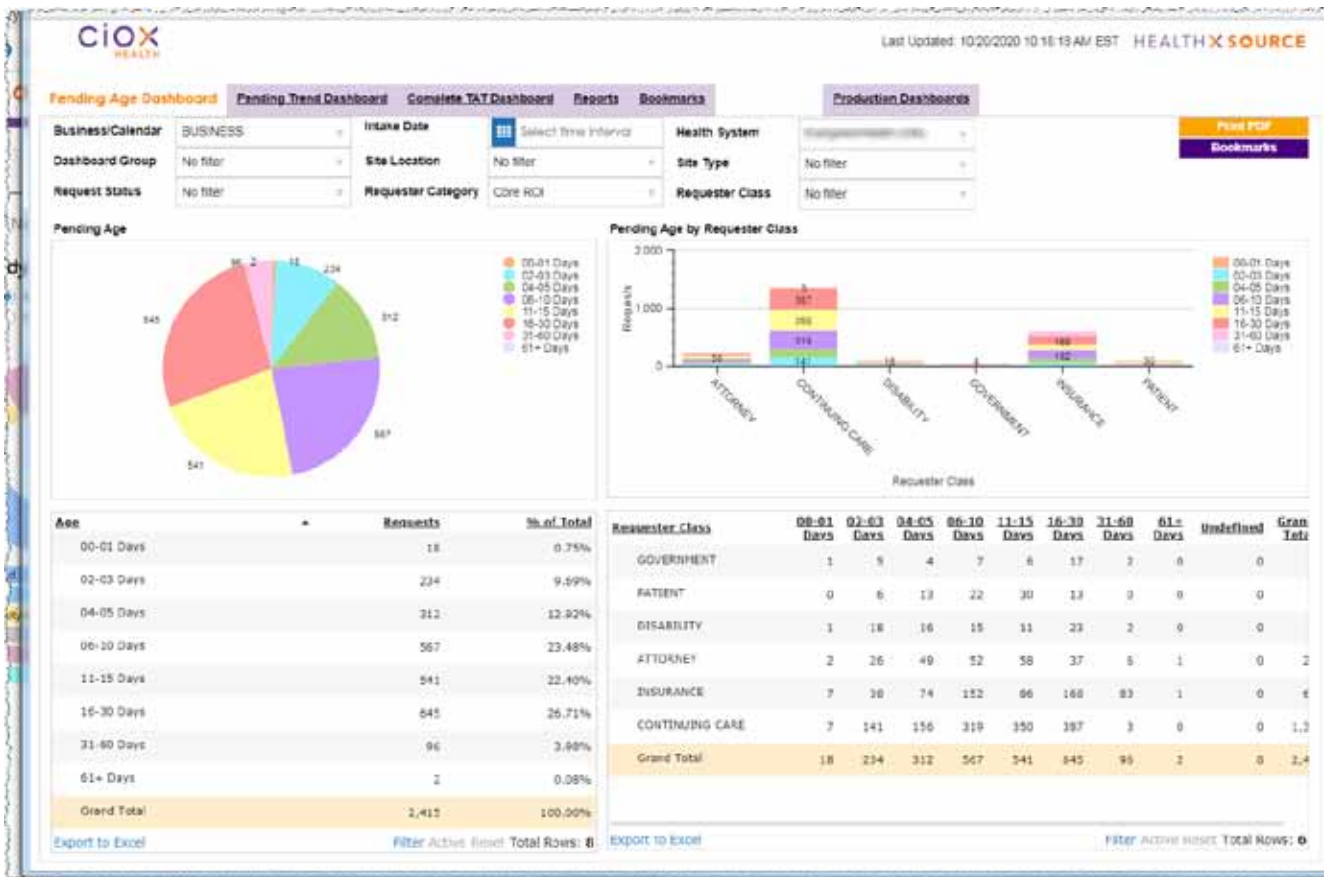
Introduction

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Understanding the Dashboard Reports

The **HealthSource Clarity Dashboards** provide critical information about the volume of ROI requests in your healthcare system and the speed at which they are processed. They provide a variety of views into this data so you can analyze it by:

- Requester Type
- Site
- Status (Logging versus Fulfillment)
- Outcome (Medical Records delivered, request cancelled as a duplicate, more information needed from requester).



Data updated hourly
Dashboard data refreshes every hour.

Time outs
The **Dashboard** window closes if your **HealthSource Clarity** session ends due to inactivity.
If you are doing a lot of work with the **Dashboards**, periodically return to **HealthSource Clarity** and do something — sort the **Search Results**, open the **Menu** — to keep your session alive.

Available Reports

Name	Description
Pending Age Dashboard	<p>How much time has it taken for requests to reach any of these conditions:</p> <ul style="list-style-type: none"> • Ready for delivery or Invoiced for Prepayment; • Completed by sending Correspondence to the requester; • Cancelled.
Pending Trend Dashboard	<p>Tracks changes in the volume of requests that have not yet reached any of these conditions:</p> <ul style="list-style-type: none"> • Ready for delivery or Invoiced for Prepayment; • Completed by sending Correspondence to the requester; • Cancelled.
Complete TAT Dashboard	<p>Turn Around Time (TAT) is measured by comparing the day a request reached the facility with the day it was:</p> <ul style="list-style-type: none"> • Ready for delivery or Invoiced for Prepayment; • Completed by sending Correspondence to the requester; • Cancelled. <p>This dashboard also shows the percentage of billable requests completed during the report period.</p>
Reports	Stand-alone reports for specific scenarios.
Production Dashboards	How many Client Service Representative tasks (Logging and Fulfilling) were performed during a specified time.

Filters

The **Filters** define what kinds of data will be captured in the individual reports. The

Business / Calendar	<p>Determines how Turn Around Time (TAT) is calculated:</p> <ul style="list-style-type: none"> Business — 5 days per week, excludes holidays and other closures. Calendar — 7 day per week, no exclusions. <p>For example, the TAT for a request created on Monday the 1st and Ready for Delivery on Tuesday the 9th would be:</p> <ul style="list-style-type: none"> Business — 6 days Calendar — 8 days 	Site ID	<p>Only data from selected sites will be shown.</p> <p>By default, the Dashboards show data from all sites.</p>
Dashboard Group	Some Health Systems can be divided into “sub-groups” for reporting purposes. These groups are set up by Ciox Health.	Requester Class	Limits results to specific kinds of requesters, such as Attorney or Insurance.
Requester Category	<p>Audit TAT — Indirect Payor (PAYI), Direct Payor (PAYD), Electronic Insurance Requests.</p> <p>Core ROI — All other requesters.</p>	Health System	If you have access to data from multiple healthcare organizations, you can limit the report data to specific choices.
Date	<p>Date range.</p> <p>Defaults to past two weeks, including the current day.</p>	Site Type	<ul style="list-style-type: none"> C — Clinic H — Hospital I — Insurance

Apply a filter

In this example, we'll use the **Requester Class** filter.

1. Click the **Filter** field (**Requester Class**).
2. The field "expands" so you can make your choice(s). If you're picking from a list (everything except the **Dates** filter), the **All / Clear** button lets you make "mass" choices.
3. Select your filtering options. Here we'll pick only **Disability** requests.
4. Click **OK**.
5. The report you're currently viewing is automatically updated to reflect your filter choices.



Multiple filters allowed

You can use more than one **Filter** at the same time.

Filter choices restricted by User Permissions

The **Site Name** and **Site ID** filters reflect your user permissions.

If you're not assigned to a specific Site, you won't be able to filter for it.

Filter choices retained during session

Any **Filter** you select will apply to all **Dashboards** — as long as the **Dashboards** stay open.

Filter choices are cleared when you close the **Dashboards**.

Saving Filter choices

Bookmark a report ([page 8](#)) to "save" your **Filter** choices.

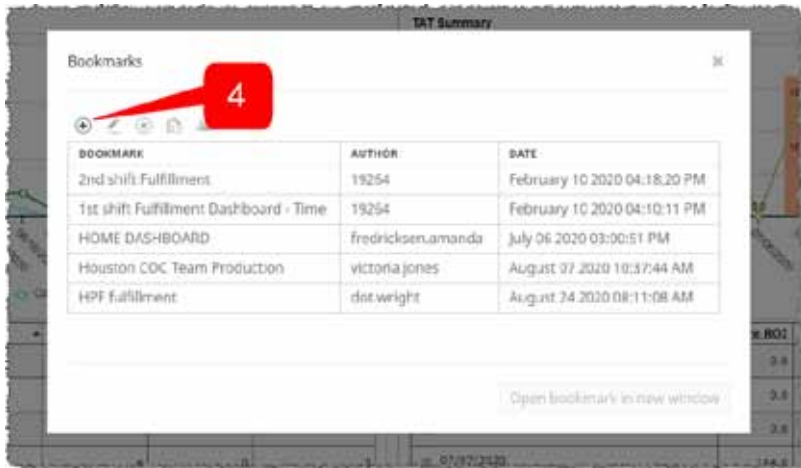
Bookmarks

Bookmarks save frequently used **Filter** settings. For example, you might want to look at all Patient requests for a hospital that wants to improve its Meaningful Use performance.

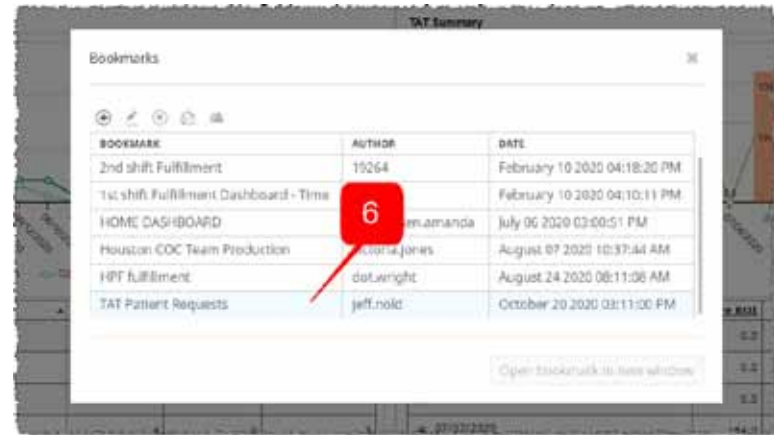
1. Launch the **Complete TAT Dashboard**.
2. Choose the appropriate **Filters**:
 - **Requester Class** — Patient
 - **Site Location** — Site in question
3. Click the **Bookmarks** button.

The screenshot shows the CIOX HEALTH dashboard interface. At the top, the logo and 'HEALTH X SOURCE' are visible, along with the text 'Last Updated: 10/20/2020 1:25:16 PM EST'. The dashboard has several tabs: 'Pending Age Dashboard', 'Pending Trend Dashboard', 'Complete TAT Dashboard' (which is highlighted in orange), 'Reports', 'Bookmarks', and 'Production Dashboards'. Below the tabs, there are filter sections for 'Business/Calendar' (set to BUSINESS), 'Date' (set to 06/06/2020 - 10/20/2020), 'Dashboard Group' (No filter), 'Site Location' (No filter), 'Requester Category' (No filter), and 'Requester Class' (set to PATIENT). A red callout box with the number '2' points to the 'Requester Class' dropdown menu. To the right, there are 'Production Dashboards' filters for 'Clinic, Test/Production' and 'No filter'. A red callout box with the number '3' points to a 'Print PDF' button and a 'Bookmarks' button. At the bottom, there are two summary sections: 'Production Summary' with values 30 and 2, and 'TAT Summary' with values 200.0 and 150.0.

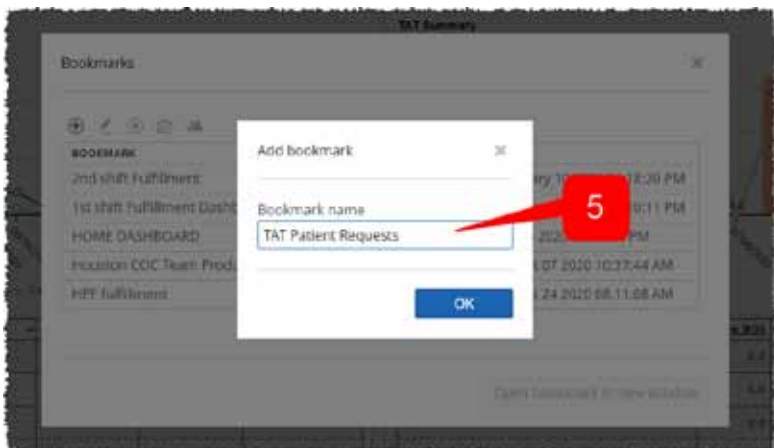
4. On the **Bookmarks** popup, click the button.



6. The next time you want to see the report, click the **Bookmarks** link and select it.



5. Give the "custom" report an appropriate name and click **OK**. In the example below, the name for the new bookmarked report is *TAT Patient Requests*.



Sorting

Many Dashboard Reports include tables. You can sort these tables by clicking a column header.

The diagram illustrates how to sort data in a table. A red callout box with the text "Click to sort" has arrows pointing to the column headers of two tables. The first table has columns for Date, Intake, Canceled, and Completed. The second table has columns for Date, Core ROI, Audits, and Total TAI. Both tables include a Grand Total row and interactive links for "Export to Excel", "Filter", "Active", "Reset", and "Total Records".

Date	Intake	Canceled	Completed
06/09/2020	0	0	3
06/10/2020	1	0	2
06/11/2020	0	0	2
06/12/2020	4	0	3
06/16/2020	4	0	1
06/17/2020	1	0	0
06/20/2020	20	1	0
Grand Total	129	3	17

Export to Excel Filter Active Reset Total Records: 36

Date	Core ROI	Audits	Total TAI
06/10/2020	0.0		0.0
06/12/2020	0.0		0.0
06/24/2020	0.0		0.0
07/07/2020	164.0		164.0
07/08/2020	0.0		0.0
10/01/2020	0.0		0.0
Grand Total	23.4		23.4

Export to Excel Filter Active Reset Total: 6

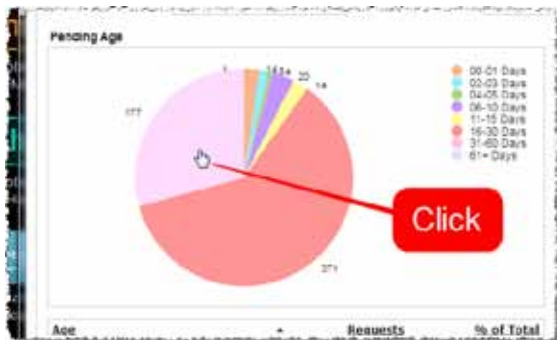
Drill down

To see more details about requests, click:

- Bar on a graph
- Slice on a pie chart
- Row in a table (not all table rows on a Dashboard link to a drill down report)

We'll show how this works using the **Pending Age** chart on the **Pending Age Dashboard**.

1. Click the light pink **31-60 Days** pie slice. You could click any other slice.



2. Choose your desired **Drill down** choices, which determine the type of detailed data to be shown.

3. The chart now shows requests that are between 31 and 60 days old, broken down by **Requester Class**.

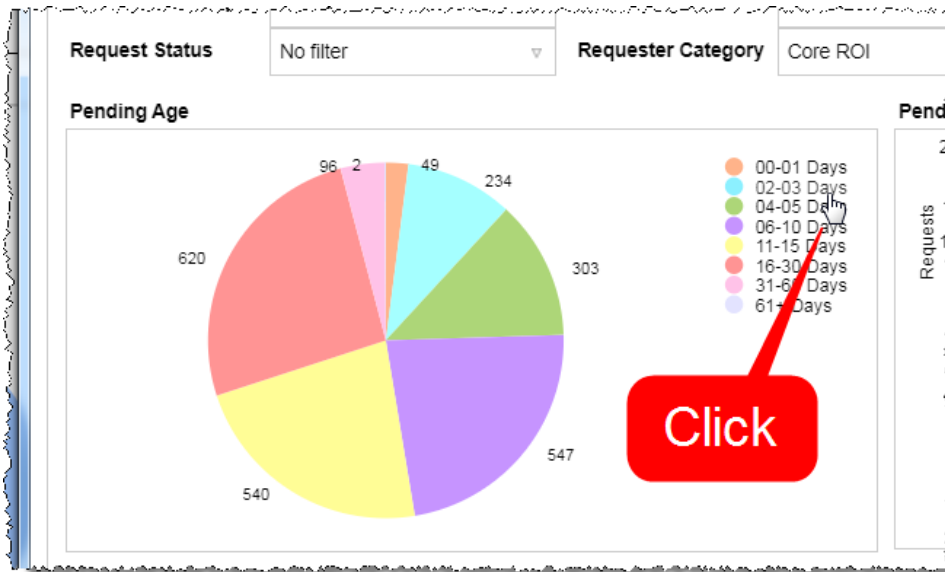


4. Click **Home / Back** to see the original chart.

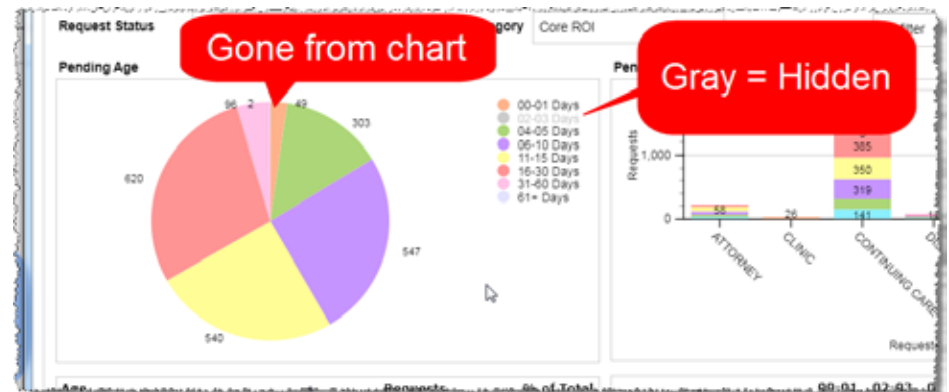
Exclude data from a graph or chart

The graphs and charts on the **Dashboards** show multiple categories of information. To hide a specific measurement, click the text label for that category.

1. Here's the default view of the **Pending Age** chart on the **Pending Age Dashboard**.
2. Note that there are 234 requests between 2 and 3 days old, shown in light blue.
3. Click the **02-03 Days** label.



4. The label is grayed out and the related slice of the pie chart is hidden.



5. Click the label again to restore the measurement to the graph or chart.

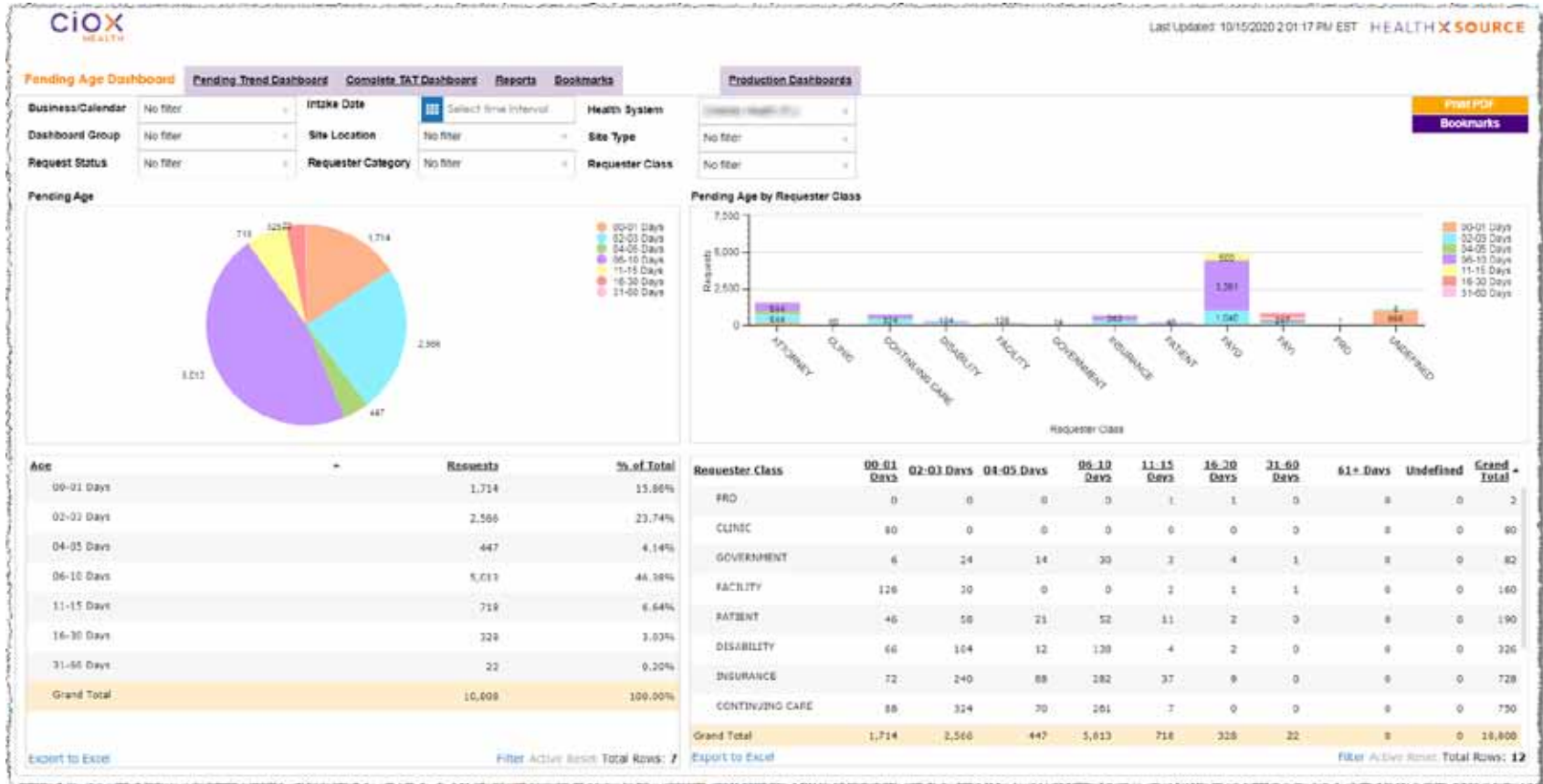
Pending Age Dashboard

What does it show?

How long requests have been open, based on the **Facility Received Date**.

Pending Age Dashboard

The **Pending Age Dashboard** shows how much time has elapsed between the receiving and closing of requests.



Definitions

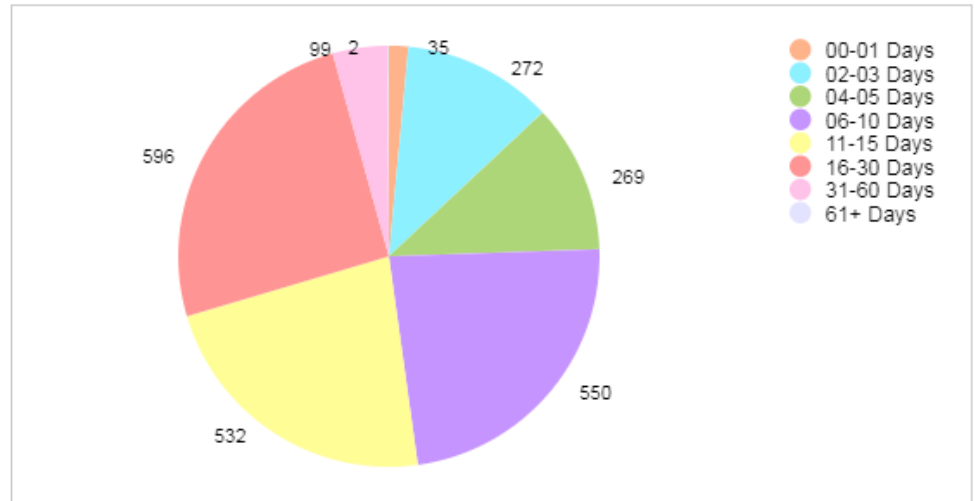
Term	Meaning
Age	<p>Difference, in days, between the Facility Received Date of a request and the current date.</p> <p>Days are “whole” units and are not calculated on a “rolling” 24 hour period. For example, a request received at 11pm on Tuesday will be 1 day old at 12:01 AM on Wednesday, even though it has only been in existence for 61 minutes.</p>
Pending (aka Open)	<p>A request has been received but has not yet reached any of these conditions:</p> <ul style="list-style-type: none"> • Ready for delivery or Invoiced for Prepayment; • Completed by sending Correspondence to the requester; • Cancelled. <p>It has NOTHING to do with the Fulfillment — Pending status, which Client Service Representatives and managers can assign to “problematic” requests.</p>
Received	<p>Request has a Facility Received Date.</p> <p>This date is used to calculate the age of the request.</p>

Pending Age chart and table

This section of the **Pending Age Dashboard** shows open requests by the elapsed time since the **Facility Received Date**. Both the pie chart and the table show the same information.

The default display is an overall view — the requests are not categorized by **Request Type**, **Requester**, etc.

Pending Age



<u>Age</u>	<u>Requests</u>	<u>% of Total</u>
00-01 Days	35	1.49%
02-03 Days	272	11.55%
04-05 Days	269	11.42%
06-10 Days	550	23.35%
11-15 Days	532	22.59%
16-30 Days	596	25.31%
31-60 Days	99	4.20%
61+ Days	2	0.08%
Grand Total	2,355	100.00%

[Export to Excel](#)

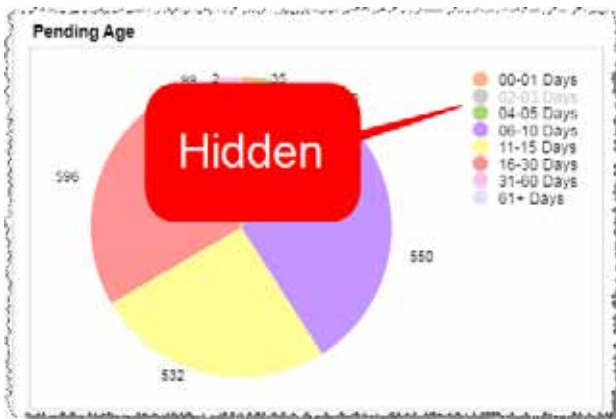
[Filter](#) Active Reset Total Rows: **8**

Hide data

Click a text label to the right of the pie chart to remove requests of that age from the chart.

The table is not affected,

For example, you can hide requests that are 0-1 days old, as in the picture below.

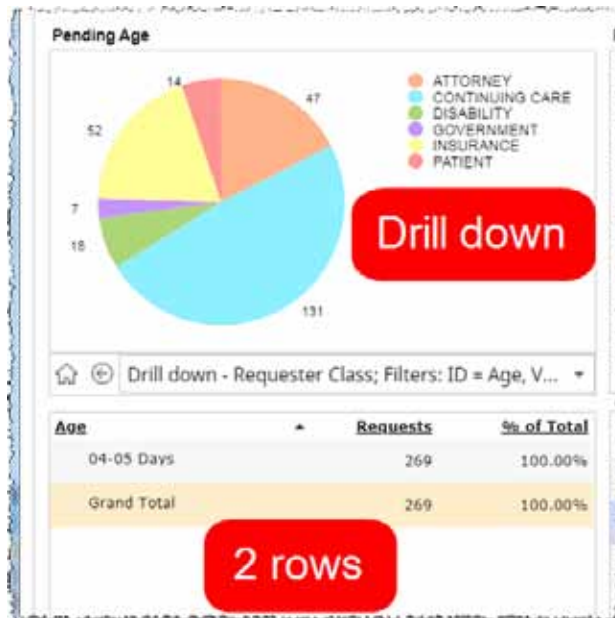


Click the label again to return the data to the chart,

Focus on a specific Age

Click a "slice" of the pie chart to show **ONLY** those requests.

- The resulting pie chart will reflect whatever choices you make on the **Drill down** popup (page 11). The picture below shows requests 4-5 days old, broken down by **Requester Type**.
- The table will be cut to only two rows — the **Age** category you clicked and **Grand Total**. These rows will be identical.



Sort

Sort the tabular data by clicking a column header.

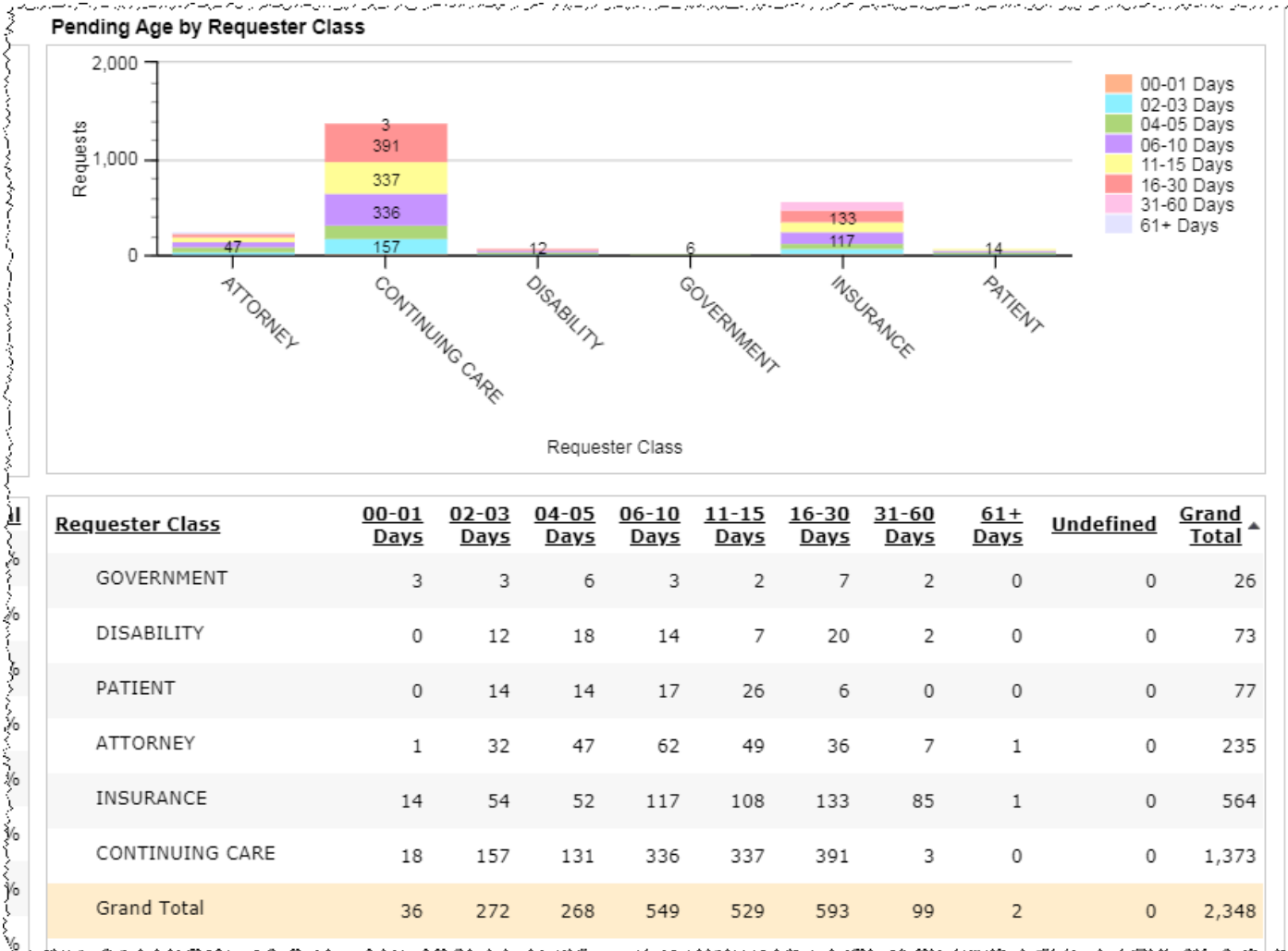
By default, the requests are listed in ascending **Age**. The picture below shows the table sorted by the # of requests in descending order.

A table showing requests sorted by the number of requests in descending order. A red callout box labeled "Descending sort" points to the table. The table includes a "Grand Total" row and an "Export to Excel" link.

Age	Requests	% of Total
16-30 Days	593	25.26%
06-10 Days	549	23.38%
11-15 Days	529	22.53%
02-03 Days	272	11.58%
04-05 Days	268	11.41%
31-60 Days	99	4.22%
00-01 Days	36	1.53%
61+ Days	2	0.09%
Grand Total	2,348	100.00%

Pending Age by Requester Class chart and table

This section of the **Pending Age Dashboard** shows the volume and age of open requests, broken down by **Requester Class**. Both the bar chart and the table show the same information.



What does Undefined mean?
 The request has not yet been associated with a **Requester Class**.

Hide data

Click a text label to the right of the bar chart to remove requests of that age from the chart for all **Requester Classes**.

The table is not affected,

For example, you can hide requests that are 11-15 days old, as in the picture below.



Click the label again to return the data to the chart,

Sort

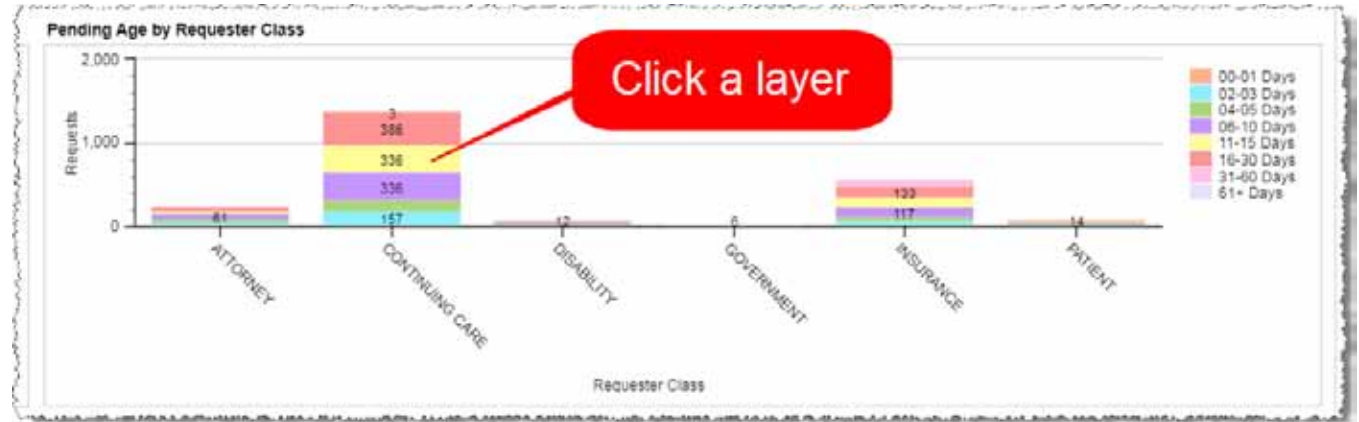
Sort the tabular data by clicking a column header.

By default, the table is sorted by the **Grand Total** column in ascending order. The picture below shows the table sorted by the **2-3 Days** column in descending order.

Requester Class	00-01 Days	02-03 Days	04-05 Days	06-10 Days	11-15 Days	16-30 Days	31-60 Days	61+ Days	Undefined	Grand Total
CONTINUING CARE	18	157	131	336	337	391	3	0	0	1,373
INSURANCE	14	54	52	117	108	133	85	1	0	564
ATTORNEY	1	32	0	0	0	0	7	1	0	235
PATIENT	0	14	0	0	0	0	0	0	0	77
DISABILITY	0	12	0	0	0	0	2	0	0	73
GOVERNMENT	3	3	0	0	0	0	2	0	0	26
Grand Total	36	272	268	549	529	593	99	2	0	2,348

Detail report

Click a "layer" of a bar on the **Pending Age by Requester Class** chart to open the detailed **Pending Age Reports** window.



Pending Age Reports

Detail - Selected Pending Age by Site - Selected Pending Age by Site - All Detail - All Pending Age by Requester - All

Last Updated Timestamp: 10/21/2020 12:05:18 PM EST

Bookmarks

eRequest ID	Log ID	Status	Location ID	Location	Request Type	Is Express ROI	Is Certified	Requester Type	Main Reason Description	Refine Reason Description	Patient Request Reason	Requester Class	Request
37437325	235411749	Fulfillment Transmission	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te
37437368	235411871	Fulfillment Transmission	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te
37435791	235407311	Fulfillment Transmission	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te
37433637	235403174	Fulfillment Transmission	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te
38356387	236276406	Fulfillment	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te
38356606	236276655	Fulfillment	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te
38357008	236277075	Fulfillment	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te
38356817	236276869	Fulfillment	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te
38356453	236276498	Fulfillment	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te
35853328	233865676	Fulfillment Pend	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Defense Attorney	Defense Attorney		ATTORNEY	Demo Te
37227406	235689987	Fulfillment	13270	HPT CASH APP TERM SITES	Standard	N	Y	Attorney	Subpoena	Subpoena		ATTORNEY	ATTORNE
43293251		Logging	13270	HPT CASH APP TERM SITES	Standard	N	N	Attorney	Attorney	Defense Attorney		ATTORNEY	DUNNIOF
35868446	233913451	Fulfillment	13270	HPT CASH APP TERM SITES	Standard	N	N	Attorney	Attorney	Defense Attorney		ATTORNEY	DUNNIOF
37433494	235402801	Fulfillment Transmission	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te
35853296	233885643	Fulfillment Transmission	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Defense Attorney	Defense Attorney		ATTORNEY	Demo Te
37436794	235410043	Fulfillment Transmission	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te
37434095	235404371	Fulfillment Transmission	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te
37436925	235410436	Fulfillment Transmission	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te
37435325	235406357	Fulfillment Transmission	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te
37437413	235412005	Fulfillment Transmission	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te
37435213	235406068	Fulfillment Transmission	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te
37436946	235410462	Fulfillment Transmission	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te
37435883	235407613	Fulfillment Transmission	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te
37435946	235407815	Fulfillment Transmission	13270	HPT CASH APP TERM SITES	Standard	Y	N	Attorney	Attorney	Defense Attorney		ATTORNEY	Demo Te

Export to Excel Filter: Attorney, Requester Type: All Rows: 7260

Detail Report	Description	Business Purpose
Detail — Selected	<p>Lists dozens of data values for the requests in the “bar segment” you clicked on the Pending Age by Requester Class chart (page 20).</p> <p>For example, if you clicked the segment for Attorney requests that are 2-3 days old, this report would show only those requests.</p> <p>This report can be contrasted to the Detail — All report, which shows the same data values but covers all the requests currently shown on the Pending Age Dashboard.</p>	Provides the information needed to find specific requests, rather than a population of requests that share a common “age.”
Detail — All	Lists dozens of data values for all requests currently captured on the Pending Age Dashboard .	
Pending Age by Site — Selected	Shows the number of requests in the “bar segment” you clicked on the Pending Age by Requester Class chart (page 20), broken down by site.	Compare request aging across multiple sites.
Pending Age by Site — All	Shows the number of requests currently captured on the Pending Age Dashboard , broken down by site.	
Pending Age by Requester — All	<p>Breaks down all the requests currently captured on the Pending Age Dashboard by site and Request Type.</p> <p>Does NOT show aging brackets. A request that is 1 day old cannot be distinguished on this report from a request that is 40 days old.</p>	<p>Can help identify possible bottlenecks for specific Request Types.</p> <p>To identify sites that may be struggling overall, the Pending Age by Site detail reports may be more useful, since they show the aging brackets.</p>

See [page 57](#) for descriptions of the columns in these reports.

Pending Trend Dashboard

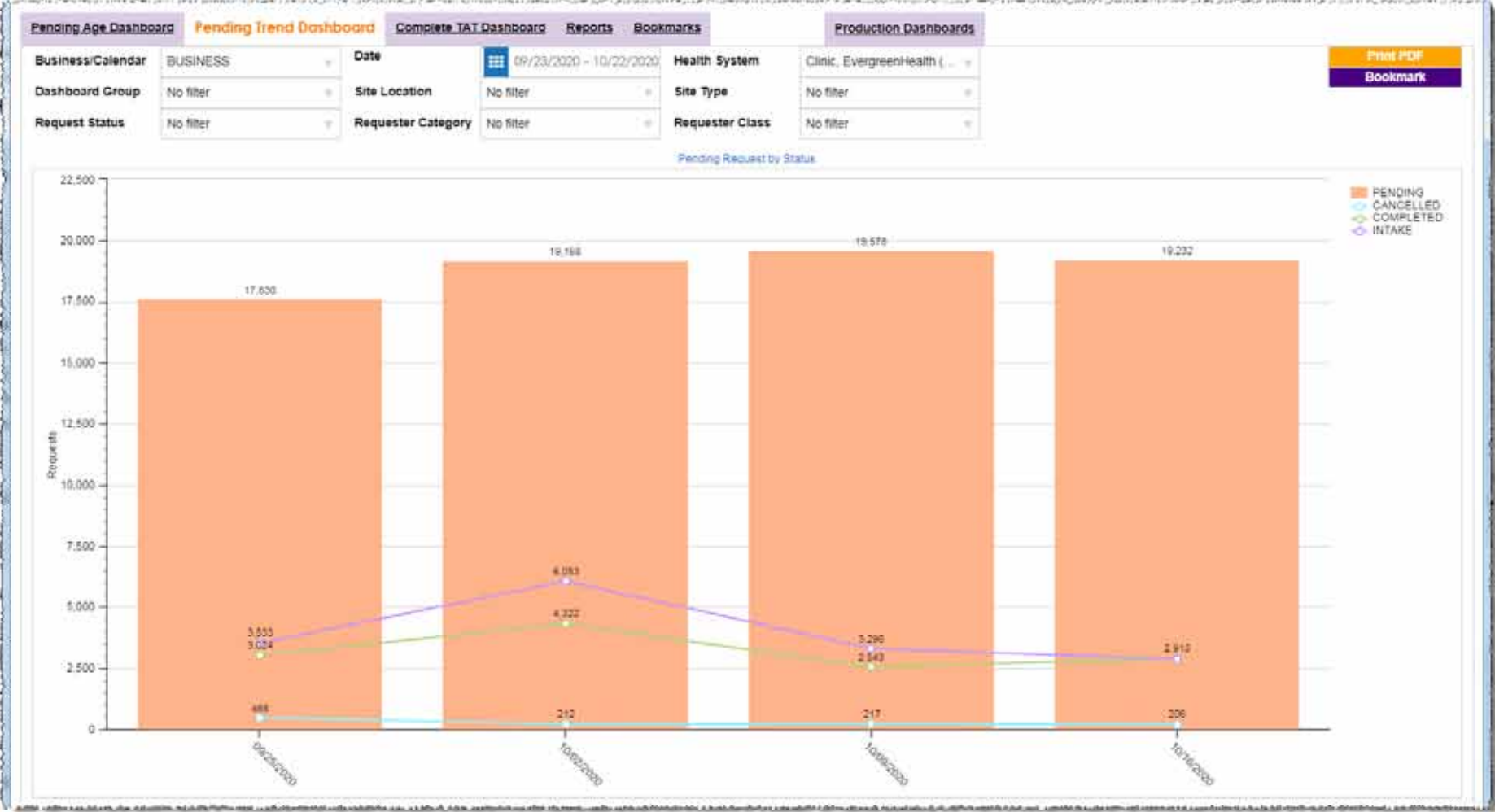
What does it show?

A weekly view of work volume, broken down by:

- Pending requests
- Completed requests
- Cancelled requests
- New requests (Intake)

Pending Trend Dashboard

The **Pending Trend Dashboard** shows the change in Pending request volume over time. You can use this Dashboard to track whether your backlog is shrinking, growing, or maintaining its size.



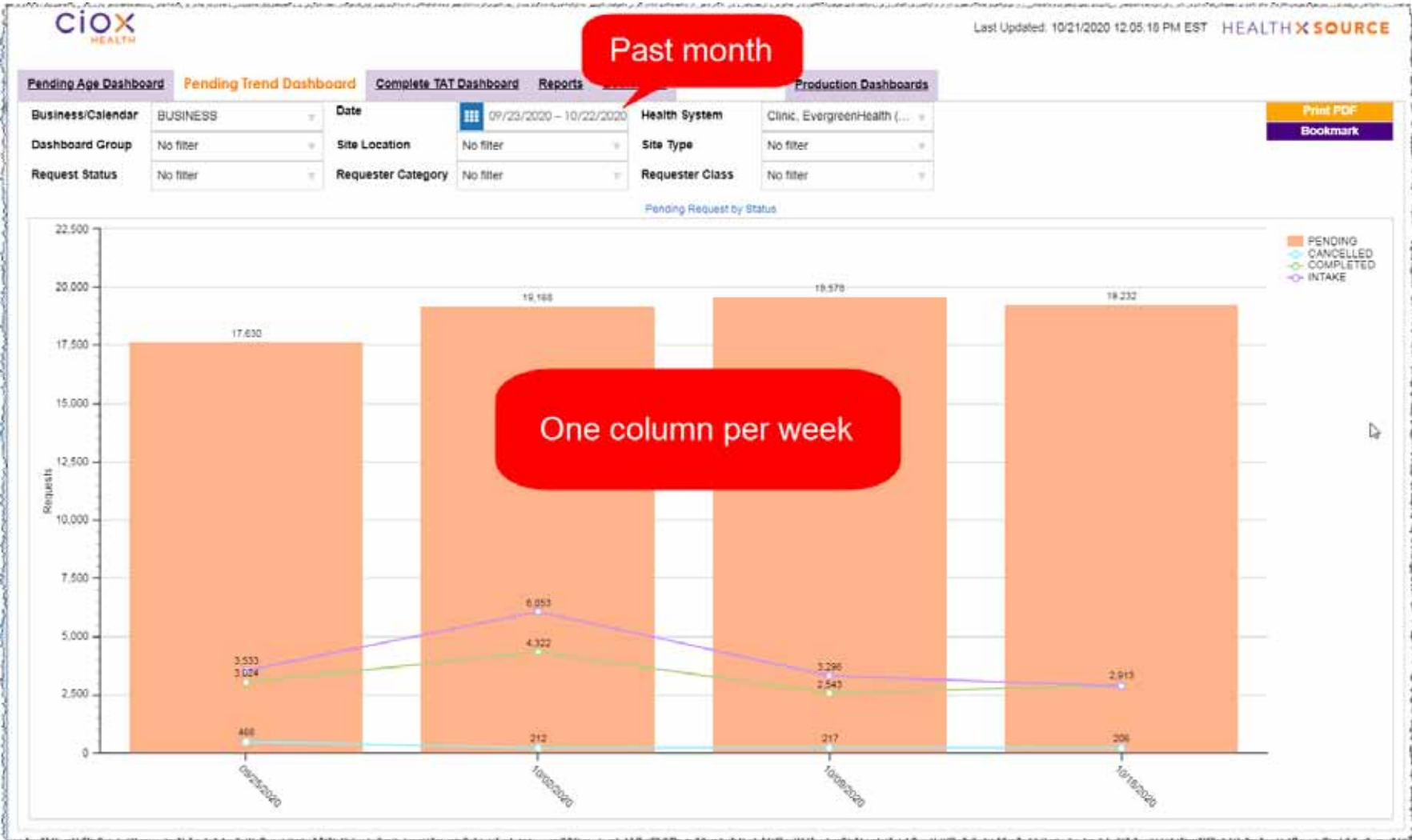
Definitions

Term	Meaning
Cancelled	<p>Request intentionally closed:</p> <ul style="list-style-type: none"> • by a Client Service Representative or Ciox Support; • Programatically through the API.
Completed	<p>Either:</p> <ul style="list-style-type: none"> • Request is at or beyond the <u>Ready for delivery</u> or <u>Invoiced for Prepayment</u> states; • Correspondence has been sent to the requester.
Pending (aka Open)	<p>A request has been received but has not yet reached any of these conditions:</p> <ul style="list-style-type: none"> • <u>Ready for delivery</u> or <u>Invoiced for Prepayment</u>; • <u>Completed</u> by sending Correspondence to the requester; • <u>Cancelled</u>. <p>It has NOTHING to do with the Fulfillment — Pending status, which Client Service Representatives and managers can assign to “problematic” requests.</p>
Intake	<p>Request was created during the report period.</p> <p>Intake requests may ALSO be counted in one of the other three categories (Cancelled, Completed, Pending). For example:</p> <ol style="list-style-type: none"> 1. Request was created on the third day of the report period; 2. Currently is <u>Ready to Fulfill</u>; 3. Counts in both the Intake and Pending categories.

Default date range

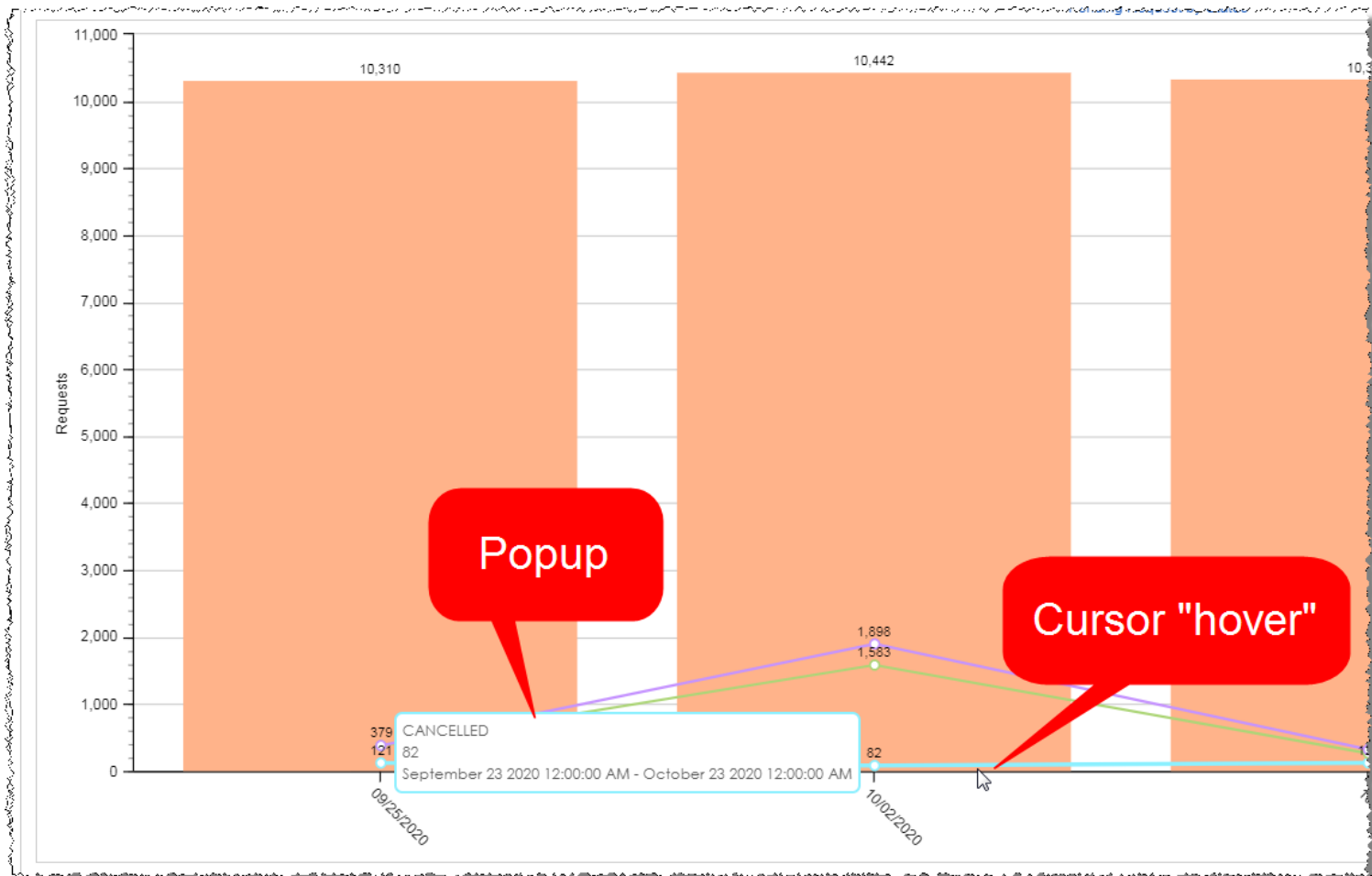
The **Date** filter for the **Pending Trend Dashboard** is set to the past month by default, which results in four columns of data, one for each week in the report period.

You can change the **Date** filter, but a longer date range may make the **Dashboard** hard to understand.



Hover cursor to "zoom"

"Hover" your cursor over a **Pending** column or a trend line (**Completed, Cancelled, Intake**) to see the request count and time period in a popup. It may be easier to view the data in this popup.

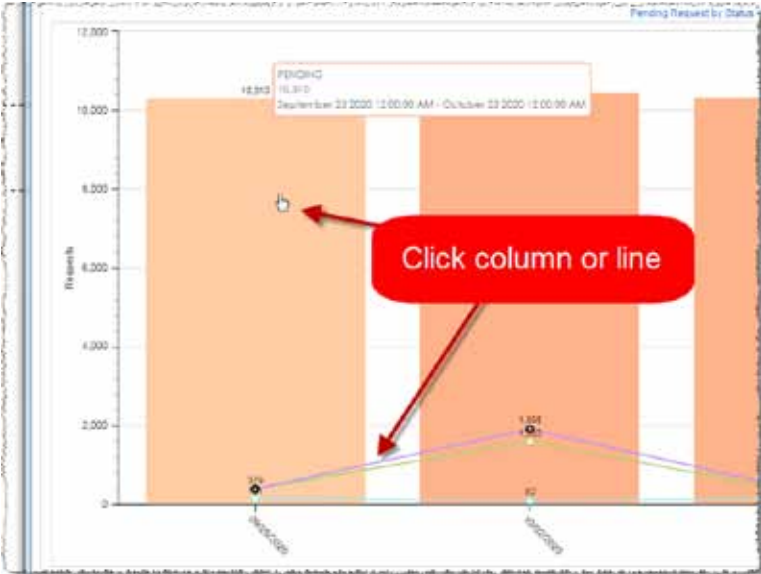


Detail report

Click a **Pending** column or a trend line (**Completed, Cancelled, Intake**) to open the detailed **Pending Trend Details** window.

The detail reports provide extremely granular data for every request in that week, broken down by the four statuses. All four detail reports are available no matter what you clicked on the **Dashboard**.

There are so many columns on these Detail Reports that you must scroll to the right to see all of the data.



The screenshot shows the 'Pending Trend Details - All' window. It features a table with the following columns: Request ID, Log ID, Status, Location, Request Type, Is Cancelled, Is Certified, Requester Type, Main Reason Description, Refine Reason Description, Patient Request Reason, and Requester Class. A red callout box labeled 'Scroll bar' points to the horizontal scroll bar at the bottom of the table.

Request ID	Log ID	Status	Location	Request Type	Is Cancelled	Is Certified	Requester Type	Main Reason Description	Refine Reason Description	Patient Request Reason	Requester Class
20,762,400	247,983,187	Fulfillment Cancelled	13270	13270 - HPT CASH APP TERM SITES	AuRE	N	N	Fac Requester	RAC-Recovery Audit Contractor	RAC Medicare	INSURANCE
50,827,130	248,695,373	Fulfillment Cancelled	13270	13270 - HPT CASH APP TERM SITES	Standard	N	N	Facility			FACILITY

Detail Report	Description	Business Purpose
Intake — All	<p>Lists dozens of data values for all requests with an Intake Date that falls in the report period for the Pending Trend Dashboard.</p> <p>As described on page 24, all Intake requests will also be counted in one of the other three Detail Reports:</p> <ul style="list-style-type: none"> • Completed • Cancelled • Pending 	Provides the information needed to find specific requests.
Completed — All	Lists dozens of data values for all requests that were completed during the report period for the Pending Trend Dashboard .	
Cancelled — All	Lists dozens of data values for all requests that were cancelled during the report period for the Pending Trend Dashboard .	
Pending — All	Lists dozens of data values for all requests that are open (pending) during the report period for the Pending Trend Dashboard .	

See [page 57](#) for descriptions of the columns in these reports.

Complete TAT Dashboard

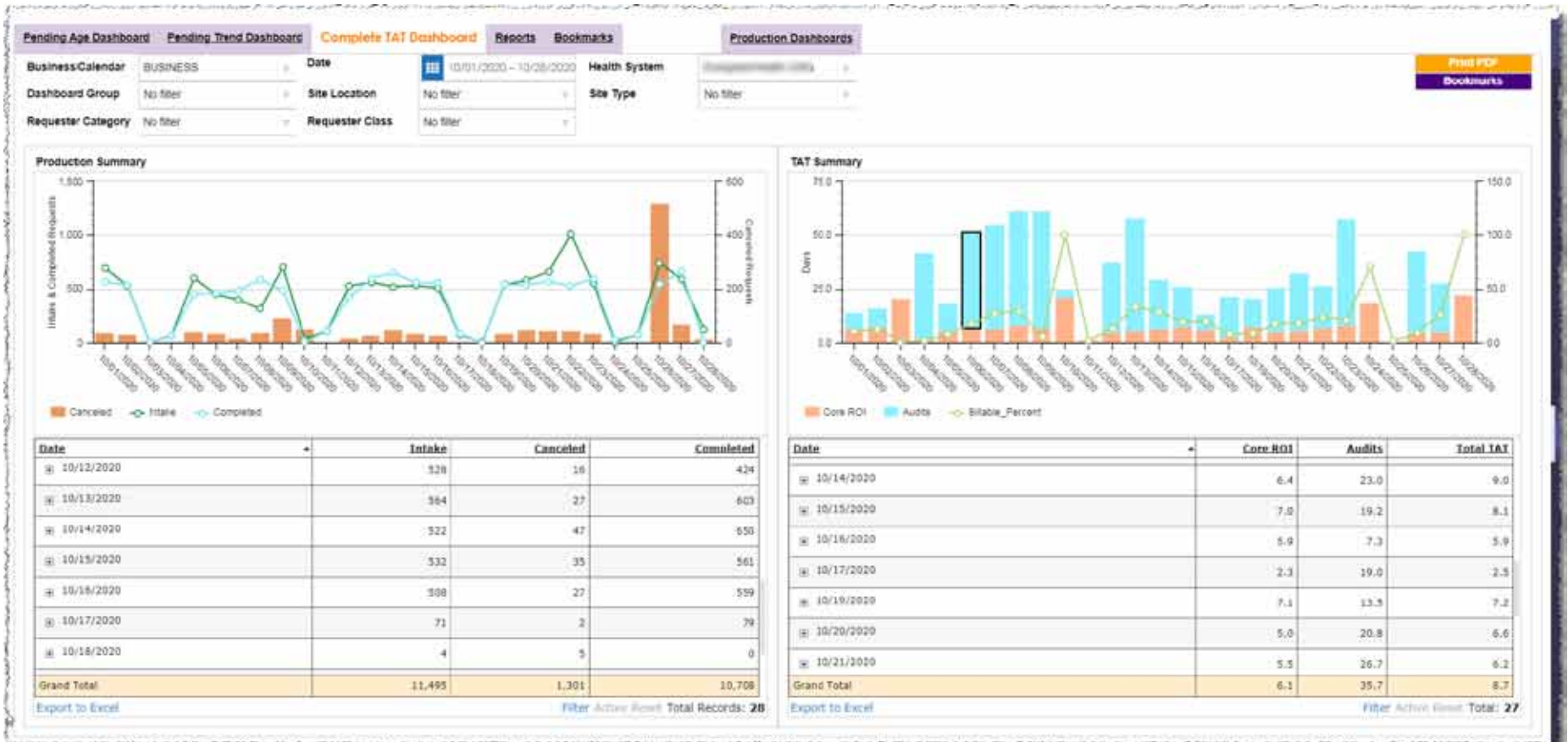
What does it show?

The time needed for requests to move from Received to Completed, known as Turn Around Time (TAT).

Use this Dashboard to track your overall production performance. The data is broken down by Status (Cancelled, Completed, Intake) and Request Category (Core ROI, Audits) and can be further segmented by Site.

Complete TAT Dashboard

The **Complete TAT Dashboard** summarizes the volume coming in (intake) and going out (completed or cancelled). The report also summarizes the total time (Turn Around Time, or TAT) it took requests to make it from **Facility Received** to **Completed**.



Definitions

Term	Meaning
Billable Percent	Billable requests divided by the total number of requests,
Cancelled	Request intentionally closed before the submission of Medical Records or Correspondence: <ul style="list-style-type: none"> • by a Client Service Representative or Ciox Support; • Programatically through the API.
Completed	Either: <ul style="list-style-type: none"> • Request is at or beyond the <u>Ready for delivery</u> or <u>Invoiced for Prepayment</u> states; • Correspondence has been sent to the requester.
Intake	Request was created during the report period. Intake requests may ALSO be counted in one of the other three categories (Cancelled, Completed, Pending). For example, a request that was created on the third day of the report period, and currently is <u>Ready to Fulfill</u> , would count in both the Intake and Pending categories.
Turn Around Time (TAT)	Calculated by comparing the Facility Received Date to either: <ul style="list-style-type: none"> • Invoiced Date (only for pre-bill requests, which require payment from requester before delivery); • Ready for Delivery date (all other requests).

Production Summary

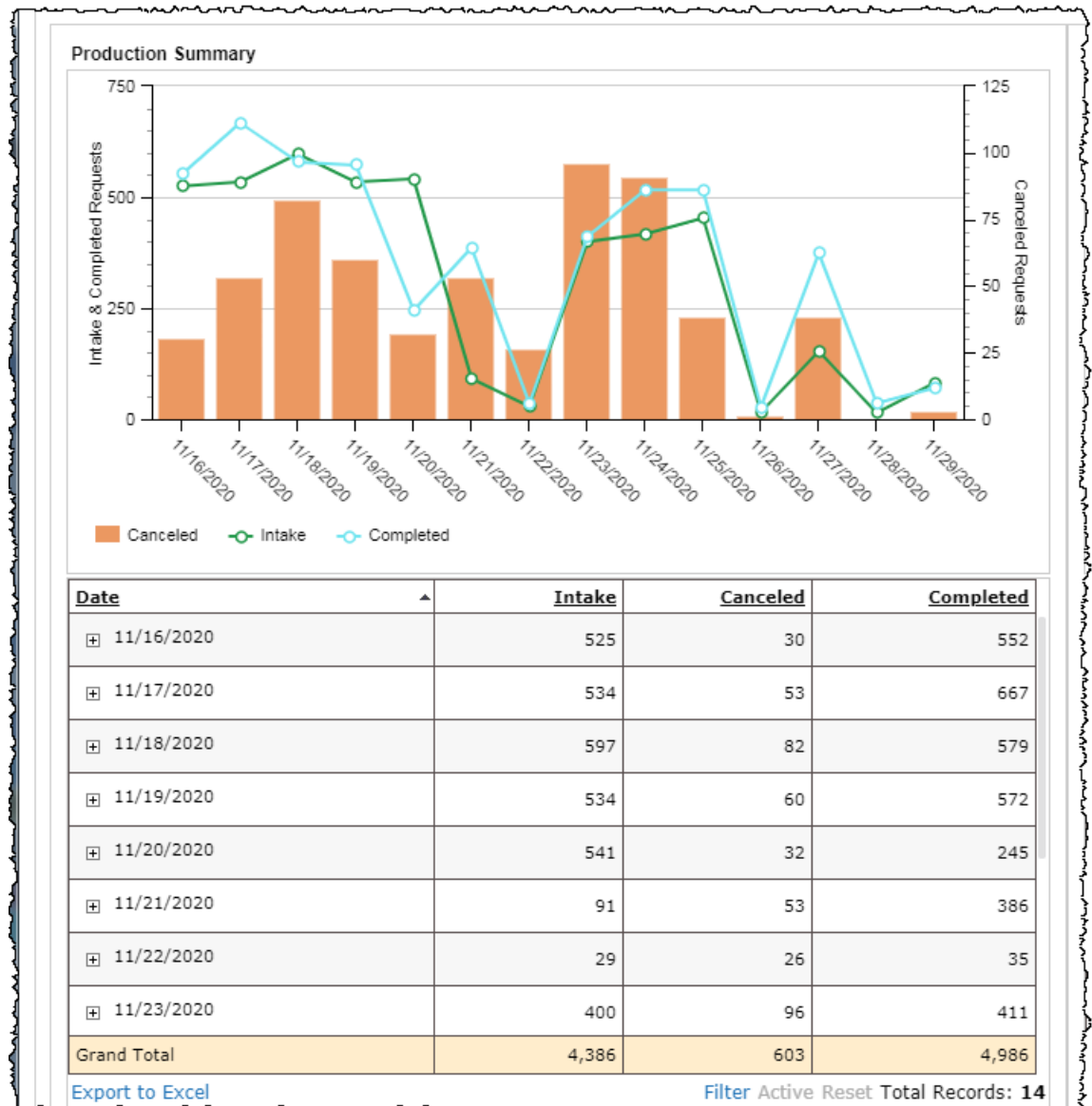
The **Production Summary** chart and table show how many requests reached a state of **Cancelled**, **Complete**, or **Intake** on each day.

To see the numbers broken down by site, expand the rows in the table section.

The scale on the **Production Summary** graph varies depending on the state of the requests being counted.

Using 11/23/2020 as an example, note that the bar representing **Cancelled** requests (96) is much “taller” than the trend lines for **Completed** (411) and **Intake** (400) requests.

- The left side of the graph shows the scale for **Completed & Intake Requests**.
- The right side shows the scale for **Cancelled Requests**.

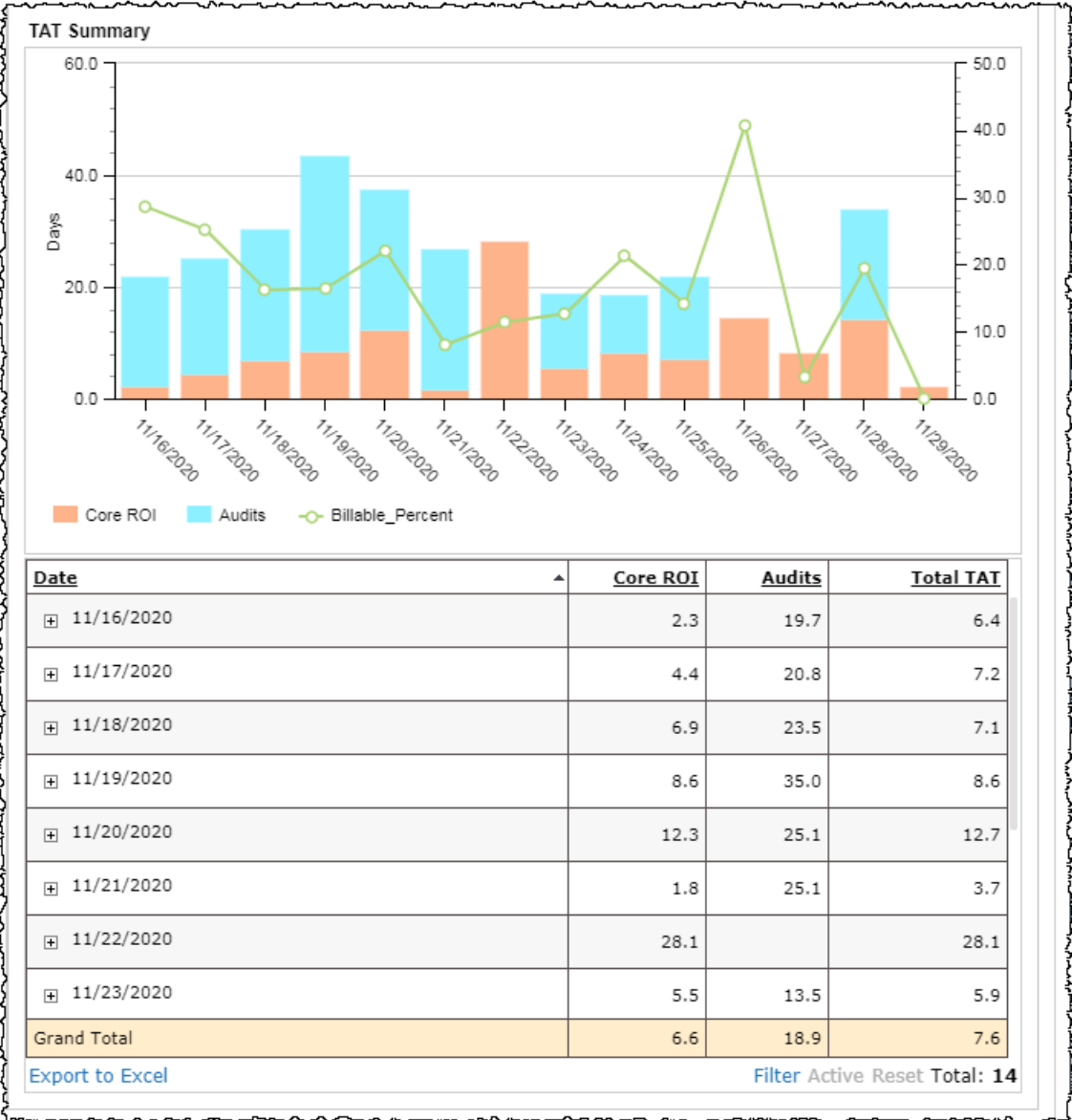


TAT Summary

The **TAT Summary** graph and chart show the Turn Around Time (TAT), in days, broken down by Requester Category (Core ROI or Audits).

It also tracks the percentage of those requests that were billable.

To see the numbers broken down by site, expand the rows in the table section.



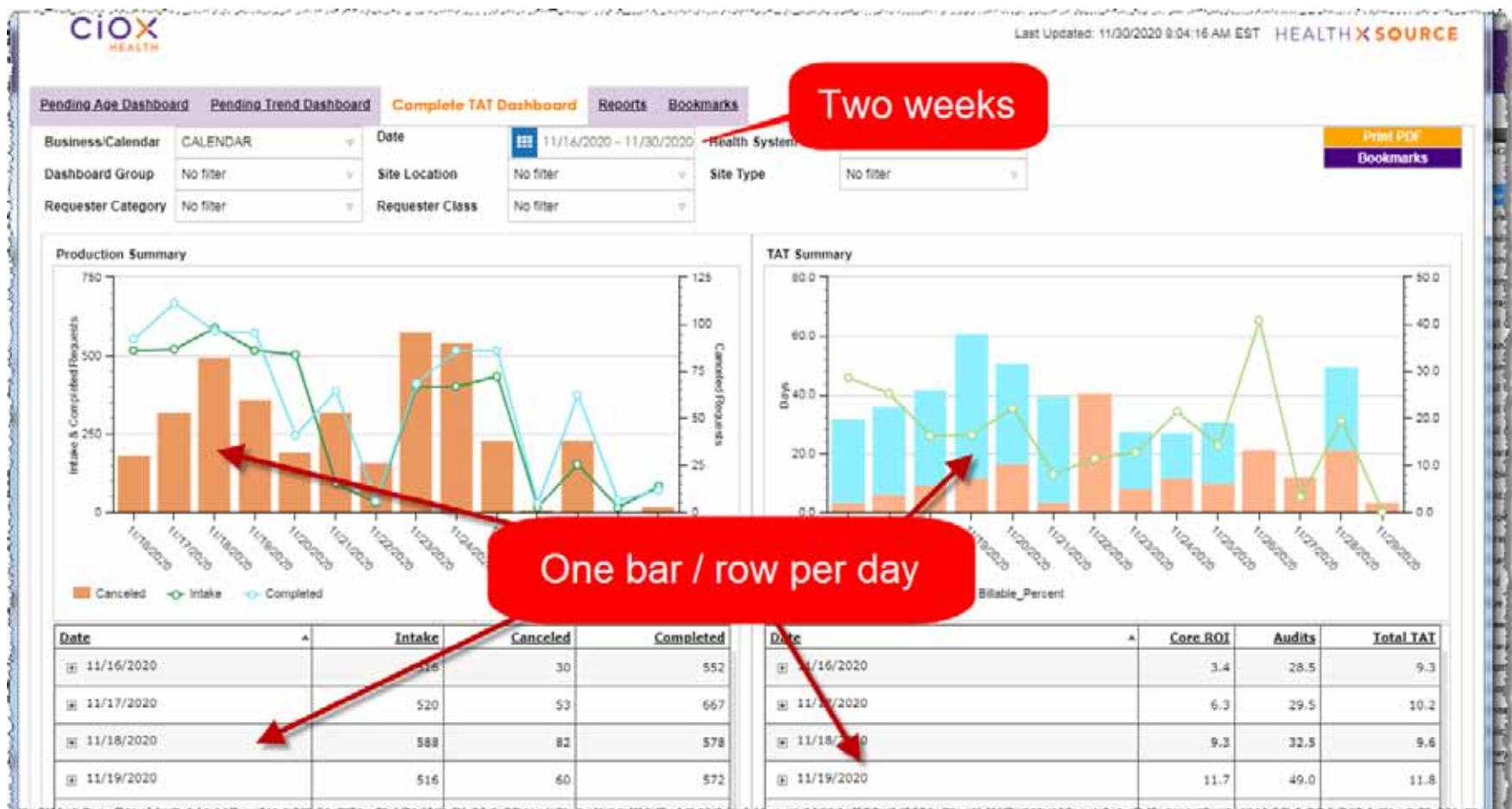
- The left side of the graph shows the scale for Turn Around Time in **Days**.
- The right side shows the scale for **Billable Percentage**.

Default date range

The **Date** filter for the **Complete TAT Dashboard** is set to the past two weeks by default. Each individual day in the report range is represented by:

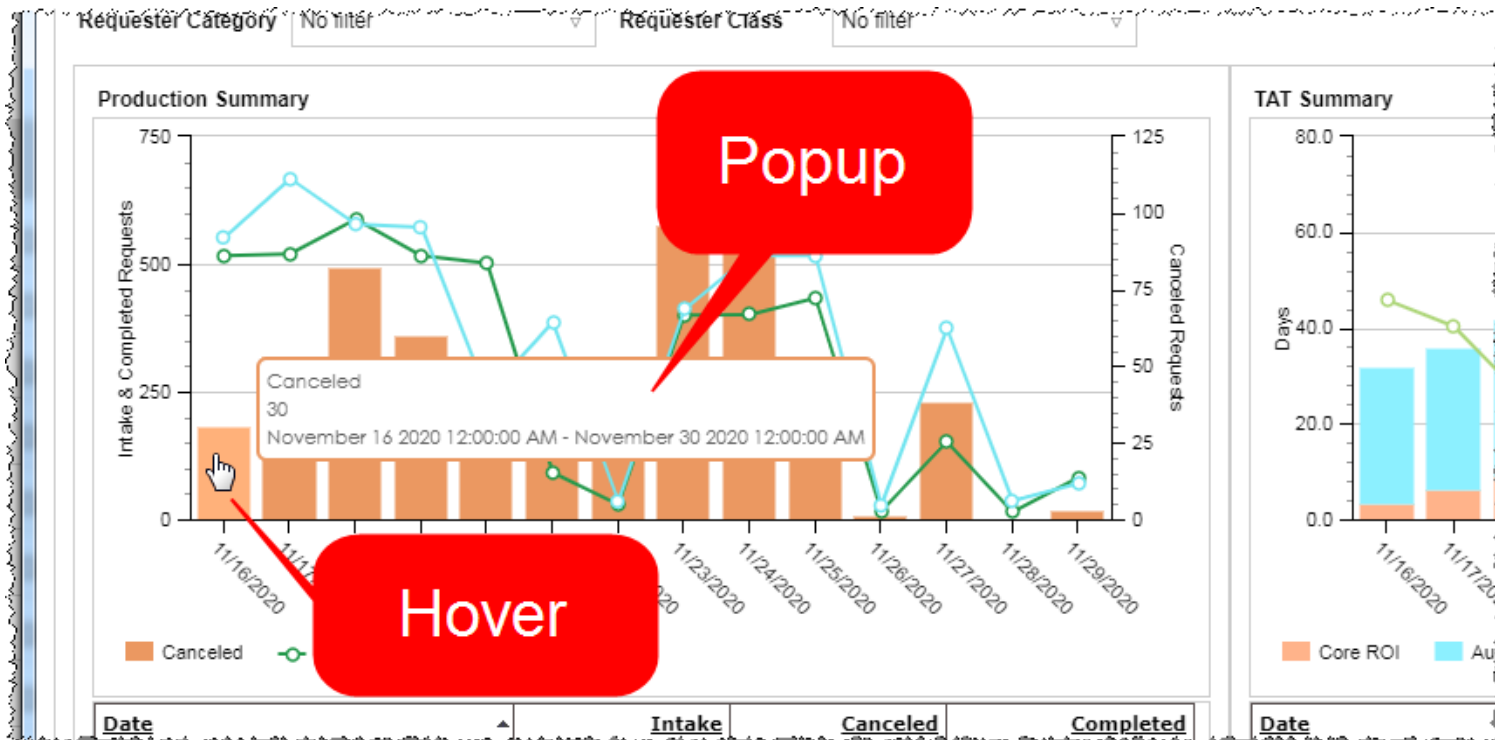
- a single bar in each graph;
- a single row in each table.

You can change the **Date** filter, but a longer date range may make the dashboard hard to understand.



Hover cursor to "zoom"

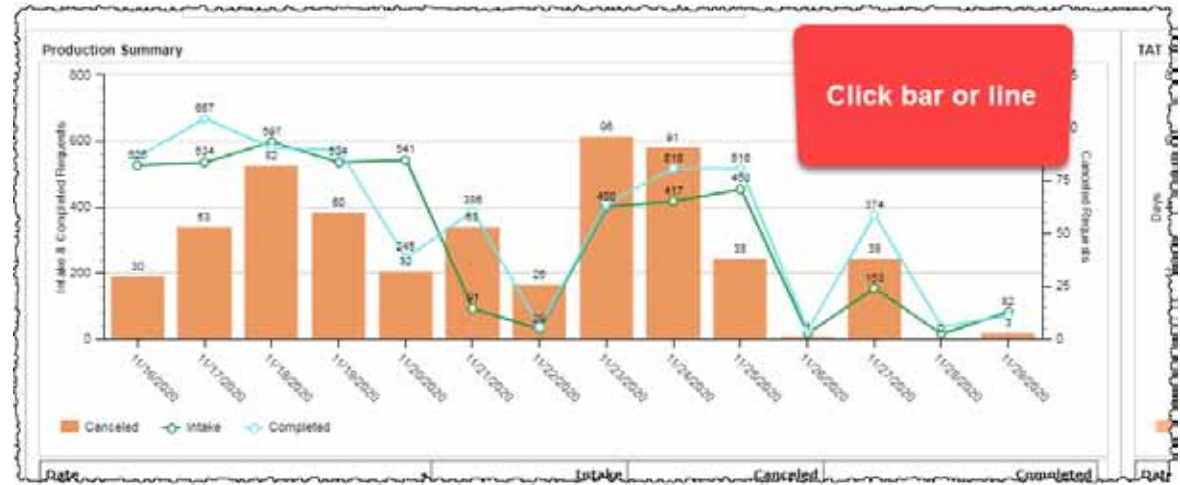
"Hover" your cursor over a column or a trend line to see the request count and time period in a popup. It may be easier to view the data in this popup.



Detail reports

Click a column or a trend line to open a **Detail Reports** popup. The name of the popup depends on how you launch it:

- Production Trend Reports
- Request Details TAT Holder



There are so many columns on these Detail Reports that you must often scroll to the right to see all of the data.

Production Trend Reports

Intake - Selected | Intake_All | Completed_Selected | Completed_All | Canceled_Selected | Canceled_All

Last Updated Timestamp: 11/03/2020 8:04:16 AM

Request ID	Loc ID	Status	Location ID	Location	Request Type	Is Express RUC	Is Certified	Reorder Type	Main Reason Description	Refile Reason Description	Patient Reason Reason
14934879	252063812	Fulfillment	25546	...	Standard	N	N	Insurance	Insurance	BC/BS Claim	
14934881	252063748	Fulfillment	25546	...	Standard	N	N	Insurance	Insurance	BC/BS Claim	
14934882	252063679	Fulfillment	25546	...	Standard	N	N	Insurance	Insurance	BC/BS Claim	
14934884	252063331	Fulfillment	25546	...	Standard	N	N	Insurance	Insurance	BC/BS Claim	
14935162	252063623	Delivered	25546	...	Concare	N	N	Continuing Care	Continuity of Care		
14935173	252063562	Delivered	25546	...	Concare	N	N	Continuing Care	Continuity of Care		
14935177	252063481	Delivered	25546	...	Concare	N	N	Continuing Care	Continuity of Care		
14935182	252063399	Delivered	25546	...	Concare	N	N	Continuing Care	Continuity of Care		
14935495	251950149	Delivered	61462	...	Standard	N	N	PAID	HSA-Medicare Risk Adjustment		
14936100	251951594	Delivered	40080	...	Standard	N	N	Insurance	Audit of Claims	DRG/Payment Integrity	
14936105	251951600	Delivered	40080	...	Standard	N	N	Insurance	Audit of Claims	DRG/Payment Integrity	
14936107	251951603	Delivered	40080	...	Standard	N	N	Insurance	Audit of Claims	DRG/Payment Integrity	
14936110	251951610	Delivered	40080	...	Standard	N	N	Insurance	Audit of Claims	DRG/Payment Integrity	
14936934	251932217	Delivered	59165	...	Standard	N	N	PAID	HSA-Medicare Risk Adjustment		
14938410	251955803	Fulfillment Canceled	59168	...	Standard	N	N	PAID	HSA-Medicare Risk Adjustment		
14938411	251955804	Fulfillment Canceled	59168	...	Standard	N	N	PAID	HSA-Medicare Risk Adjustment		
14938412	251955808	Fulfillment Canceled	59168	...	Standard	N	N	PAID	HSA-Medicare Risk Adjustment		
14938413	251955809	Fulfillment Canceled	59168	...	Standard	N	N	PAID	HSA-Medicare Risk Adjustment		
14938415	251955811	Fulfillment Canceled	59168	...	Standard	N	N	PAID	HSA-Medicare Risk Adjustment		
14938416	251955812	Fulfillment Canceled	59168	...	Standard	N	N	PAID	HSA-Medicare Risk Adjustment		

Expert to Excel | Filter Active Rows | Total Rows: 360

Detail Report	Description
Intake — Selected	Lists dozens of data values for requests that were created on the date that you clicked, even if you clicked a Completed trend line or the Cancelled bar.
Intake — All	Lists dozens of data values for all requests that were created during the report date range for the Complete TAT Dashboard , no matter what date you clicked to open the Detail Reports window.
Completed — Selected	Lists dozens of data values for requests that were completed on the date that you clicked, even if you clicked an Intake trend line or the Cancelled bar.
Completed — All	Lists dozens of data values for all requests that were completed during the report date range for the Complete TAT Dashboard , no matter what date you clicked to open the Detail Reports window.
Cancelled — Selected	Lists dozens of data values for requests that were cancelled on the date that you clicked, even if you clicked a Completed or Intake trend line.
Cancelled — All	Lists dozens of data values for all requests that were cancelled during the report date range for the Complete TAT Dashboard , no matter what date you clicked to open the Detail Reports window.
Detail — Selected	Lists dozens of data values for requests completed on the date you clicked to open the Detail Reports window.
TAT By Requester Class — All	Shows the Turn Around Time by Requester Type (not just Requester Category) for every day in the report range, no matter what date you clicked to open the Detail Reports window.
TAT By Site — All	Shows the Turn Around Time at every site for every day in the report range, no matter what date you clicked to open the Detail Reports window.
Detail — All	Lists dozens of data values for all requests completed in the report range, no matter what date you clicked to open the Detail Reports window.

See [page 57](#) for descriptions of the columns in these reports.

What do they show?

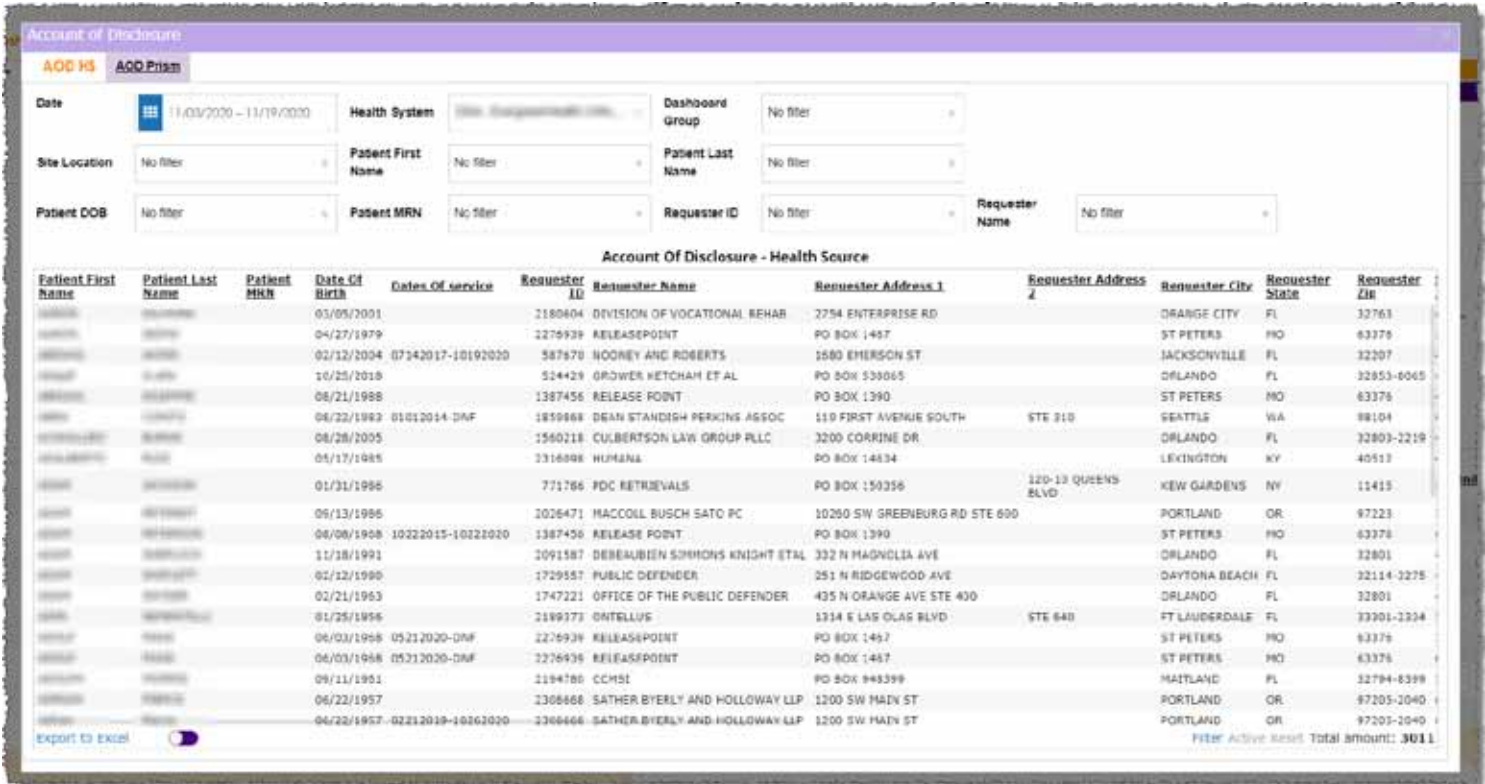
You can run specific reports for these areas of interest:

- AOD — Accounting of Disclosures.
- Metrics — request volume by workflow step.
- Customer Summary — productivity per Requester Type.
- Processed Summary — shows Completed and Pending requests by Requester Type and Request Type.
- Production By Milestone — trending volume of requests by workflow step.
- Request Details — extremely granular information on every request in the report range.
- STAT Summary — STAT vs. non-STAT request volume by HealthSource Clarity user.

AOD Report

Shows disclosures of patient health information made through HealthSource Clarity and Prism, a legacy ROI application.

This report provides Filters for focusing on specific patients. These filters may be cumbersome, because each choice is listed separately. For example, if your report captures 100 patients, there may be 100 unique choices in the **Patient MRN** filter.



Patient First Name	Dates of Service	Site ID	eRequest ID	Total Pages
Patient Last Name	Requester ID	Site Name	Request ID	Requested Record Types
Patient MRN	Requester Name	Requester Class	Facility Received Date	
Date of Birth	Requester Address	Reason for Request (Primary only)	Delivery Date	

Metrics Report

Shows the number of requests that have passed through specific steps in the HealthSource Clarity workflow.

This report offers a **Request Status** filter.

The screenshot shows the Metrics Report interface with the following filters: Business/Calendar: BUSINESS; Date: 11/01/2020 - 11/18/2020; Site Location: No filter; Dashboard Group: No filter; Health System: Clinic; Request Status: No filter; Core ROI; Requester Class: No filter; Site Type: No filter. The data table below shows metrics for site location 44746-ORTHOPEDIC SPORTS AND ENHANCE and a Grand Total row.

Site Location	Count	Billable	Non Billable	Facility Rcvd Cnt	Intake Cnt	Fulfillment Cnt	Indexing Cnt	Invoice Cnt	Delivered Cnt	Avo Days TAT Intake to Fulfillment	Avo Days TAT Fulfillment to Index	Avo Days TAT Index to Invoice	Avo Days TAT Invoice to Delivered	Avo Days TAT Total
44746-ORTHOPEDIC SPORTS AND ENHANCE	8	8		8	8	7	7	7	6	0.00	0.43	0.00	0.33	0.7
Grand Total	8	8		8	8	7	7	7	6	0.00	0.43	0.00	0.33	0.7

Detail Reports
Click a row to open a detail report.

Count	Intake Count	Delivered Count
Billable	Fulfillment Count	Average Turnaround Times between workflow steps
Non-Billable	Indexing Count	
Facility Received Count	Invoice Count	

Customer Summary Report

Shows five key measures of productivity, broken down by Requester Class Category. You can expand each "parent" Requester Class Category to see the measures for each "child" Requester Class.

Pending Age

How long requests have been open.

Production Summary

Number of requests that were created, cancelled, and completed.

Also shows the total number of medical record pages attached to the completed requests.

Completed

How long it took to complete requests that were finally delivered in the report range.

Billable

How many billable and non-billable requests and pages were completed in the report period.

Completed TAT

- Intake TAT = time between **Facility Received Date** and **Intake Date**.
- Fulfillment TAT = Time between **Ready to Fulfill** and **Packaging in Progress**.

The screenshot displays the CIOX Customer Summary Report interface. It features a navigation bar with tabs for Pending Age, Production Summary, Completed, Billable, and Completed TAT. Below the navigation bar are several data tables. The first table, 'Pending Age by Requester Class', shows data for categories like UNDEFINED, Core R01, and Audit. The second table, 'Production Summary', shows counts for Intake, Cancelled, and Completed requests. The third table, 'Completed', shows Intake TAT and Facility TAT. The fourth table, 'Billable', shows counts for Billable Requests, Billable Pages, Non-Billable Requests, and Non-Billable Pages. The fifth table, 'Completed TAT by Requester Class', shows Intake TAT and Facility TAT for different requester classes.

Detail Reports
Click a row to open a detail report.

Processed Summary

This reports shows **Completed** and **Pending** requests, broken down by **Requester Type** and **Request Type**.

This report offers a **Request Status** filter.

- Completed Requests = Time between **Facility Received Date** and **Ready for Delivery** or **Invoiced for Prepayment**.
- Pending Requests = How many days have elapsed from the **Facility Received Date** to now.

Requester Class	0-1 Days	2-3 Days	4-5 Days	6-10 Days	11-15 Days	16-30 Days	31-60 Days	>61 Days	Undefined	Grand Total	Facility Rec'd to Completed TAT
CLINIC	8,410	0	0	0	0	0	0	0	0	8,410	0.0
CONTINUING CARE	1,894	1,108	278	609	127	2	1	0	0	4,018	2.8
DISABILITY	132	1,087	354	223	16	2	1	0	0	1,817	3.5
PATIENT	333	215	393	132	30	4	0	0	0	895	3.8
FACILITY	14	130	44	11	4	4	3	0	0	214	4.4
GOVERNMENT	81	78	71	131	27	4	0	0	0	283	4.9
ATTORNEY	804	798	933	1,315	288	23	2	2	0	3,974	5.1
INSURANCE	87	219	267	702	268	40	19	0	0	1,612	7.6
Grand Total	11,854	2,590	2,471	4,085	1,672	1,040	156	2	0	25,361	3.9

Requester Class	0-1 Days	2-3 Days	4-5 Days	6-10 Days	11-15 Days	16-30 Days	31-60 Days	>61 Days	Undefined	Grand Total
CLINIC	1	0	0	0	0	0	0	0	0	1
GOVERNMENT	9	31	11	8	1	2	0	0	0	53
DISABILITY	24	30	0	2	0	0	0	0	0	56
PATIENT	21	27	9	12	4	0	0	0	0	73
FACILITY	21	35	27	1	1	1	1	0	0	117
CONTINUING CARE	69	88	88	14	2	0	0	0	0	211
INSURANCE	57	71	105	44	8	0	0	0	0	283
PRYI	0	44	88	61	137	71	3	0	0	369
Grand Total	1,500	532	660	400	240	84	53	0	0	3,569

You can currently open a Detail Report for Pending requests but not for Completed requests.
 Use the **Customer Summary** report or the **Complete TAT Dashboard** to see details about Completed requests.

Production by Milestone

This report illustrates the trending volume per milestone event, broken down by Major Class and Requester Type:

- Intake
- Logged
- Fulfilled
- Invoiced
- Ready for Delivery
- Canceled

Detail Reports
 Click a row to open a detail report.

This report offers a **Major Class** filter.

The screenshot shows a software interface with a navigation bar at the top containing 'Production Dashboard', 'Reports', and 'Dashboards'. Below the navigation bar are several filter sections: 'Data' (12/18/2020 - 1/18/2021), 'Dashboard Group' (No filter), 'Health System' (Cinc. Children's (CH), Grand Health (GL)), 'Requester Status' (No filter), 'Site Location' (No filter), 'Requester Category' (No filter), 'Requester Class' (No filter), and 'Site Type' (No filter). There are also buttons for 'Print PDF', 'Bookmarks', and 'Export to Excel'.

The main content area is divided into two sections: 'Completed' and 'Pending'.

Completed Table:

Requester Class	0-1 Days	2-3 Days	4-5 Days	6-10 Days	11-15 Days	16-30 Days	31-60 Days	>61 Days	Undeclared	Grand Total	Facility Used in Summated TAT
CLINIC	8,410	0	0	0	0	0	0	0	0	8,410	0.0
CONTINUING CARE	1,894	1,158	275	404	127	0	1	0	0	4,859	2.6
DISABILITY	132	1,387	266	223	16	2	1	0	0	3,017	2.8
PATIENT	333	215	281	132	30	4	0	0	0	885	2.8
FACILITY	19	130	44	11	4	9	3	0	0	214	4.4
GOVERNMENT	81	78	71	131	37	4	0	0	0	362	4.9
ATTORNEY	694	739	333	1,325	285	23	2	0	0	3,974	6.5
INSURANCE	87	229	267	702	265	42	19	0	0	1,612	7.6
Grand Total	11,954	3,989	2,471	4,985	1,872	1,346	259	1	0	29,391	3.9

Pending Table:

Requester Class	0-1 Days	2-3 Days	4-5 Days	6-10 Days	11-15 Days	16-30 Days	31-60 Days	>61 Days	Undeclared	Grand Total
CLINIC	1	0	0	0	0	0	0	0	0	1
GOVERNMENT	9	21	11	8	2	2	0	0	0	53
DISABILITY	24	30	8	2	0	0	0	0	0	64
PATIENT	21	27	9	12	4	0	0	0	0	73
FACILITY	21	95	37	1	1	1	0	0	0	157
CONTINUING CARE	88	88	58	24	2	0	0	0	0	259
INSURANCE	87	71	108	44	6	0	0	0	0	285
PAID	0	64	59	61	127	71	3	0	0	395
Grand Total	1,900	632	646	420	240	84	63	0	0	1,588

Request Details

This report shows comprehensive information about all the requests in the report range.

This report offers a **Request Status** filter.

The screenshot shows a web application interface for 'Request Details'. At the top, there are several filter controls: Date (11/17/2020 - 11/19/2020), Dashboard Group (No filter), Health System (dropdown), Request Status (No filter), Site (No filter), Requester Category (Core ROI), Requester Class (No filter), and Site Type (No filter). A 'Last Updated Timestamp' of 11/18/2020 10:24:17 AM EST is displayed on the right. Below the filters is a table with the following columns: Request ID, Loc ID, Status, Location ID, Location, Request Type, Is Express ROI, Is Certified, Requester Type, Main Reason Description, Refine Reason Description, Patient Request Reason, and Requester. The table contains 8 rows of data, all with a 'Delivered' status. At the bottom left, there is an 'Export to Excel' button with a toggle switch. At the bottom right, it says 'Filter Active Reset Total Rows: 119'.

Request ID	Loc ID	Status	Location ID	Location	Request Type	Is Express ROI	Is Certified	Requester Type	Main Reason Description	Refine Reason Description	Patient Request Reason	Requester
54834478	251866140	Delivered	33667	...		N		Pax-Continuing Care				CLINIC
54856974	251893329	Delivered	40080	...	Standard	N	N	Insurance	Insurance	Standard Insurance Claim Payment		INSURAN
54857497	251893664	Delivered	40080	...	Standard	N	N	Insurance	Insurance	Standard Insurance Claim Payment		INSURAN
54858638	251894519	Delivered	40080	...	Standard	N	N	Insurance	Insurance	Standard Insurance Claim Payment		INSURAN
54859056	251894871	Delivered	40080	...	Standard	Y	N	Insurance	Insurance	Standard Insurance Claim Payment		INSURAN
54860102	251895732	Delivered	40080	...	Standard	N	N	Insurance	Insurance	Standard Insurance Claim Payment		INSURAN
54861017	251896055	Delivered	40080	...	Standard	Y	N	Insurance	Insurance	Standard Insurance Claim Payment		INSURAN
54862142	251896959	Delivered	40080	...	Standard	Y	N	Insurance	Insurance	Standard Insurance Claim Payment		INSURAN

Do **NOT** use this report to see “true” volume or to calculate TAT. Because it is based on the Intake date, it may include requests that are not complete, have been cancelled, or were the “parent” or “child” or a Split request.

Column	Description
eRequest ID	HealthSource Clarity identification #.
Log ID	Ciox Health identification #.
Status	Current Status.
Location ID	Site number.
Location	Site name.
Request Type	As specified by the CSR or via the API.
Is Express ROI	Handled through the Submit and Fulfill (Express ROI) command.
Is Certified	Passed through the Certification process. Does not indicate that a request is still awaiting certification.
Requester Type	From customer database.
Reasons	As selected during Logging / Fulfillment or automatically through API.
Requester Class	From customer database.
Requester Name	
Requestor Fax Number	
Group ID	For Ciox Phoenix requests.
Chart Location	For future use.
Source	Intake Method.
Request Letter Date	Date letter created by requester.
Facility Received Date	Request Letter arrived at facility.
Intake Date	Request created in HealthSource Clarity.
Fulfillment Date	When Request Status = Ready to Fulfill.
Indexing Date	When Status = Indexing.
Invoicing Date	When Status = Invoicing.
Delivery Date	When Status = Delivery. Means ready for delivery, not delivered.
Cancelled Date	When Status = Cancelled.
Due Date	Calculated for some Request Types.

Column	Description
Completed Date	When Status = Completed.
Days calculations	How long the request spent in a specific workflow status.
Billable	Y unless Non-Billable Reason selected.
DDS State	State from which Disability request originated.
Delivered	If Delivery Method provides confirmation, Y and N indicate whether the package reached the requester. For USPS 1st class mail, Y = Sent.
Delivery Description	Delivery Method.
Page Counts	Source of pages.
Page Count is Known	Has the total captured # of Medical Record pages been entered?
STAT Request	Yes (Y) or No (N).
Total Requests	Always 1
Patient Information	Name, Account, MRN, DOB.
Dates of Service	From / To.
VPO	Vice President of Operations.
RMO	Regional Manager of Operations.
Zone	As defined in Member Admin.
Region	As defined in Lawson.
Request Volume Type	<ul style="list-style-type: none"> • Intake • Completed • Cancelled
Request Class Category	<ul style="list-style-type: none"> • Audit TAT — Indirect Payor (PAYI), Direct Payor (PAYD), Electronic Insurance Requests. • Core ROI — All other requesters.
Request ID	Identification value.
Health System	Health care group that received the request.

Column	Description
Dashboard Group	Some Health Systems can be divided into “sub-groups” for reporting purposes. These groups are set up by Ciox Health.
Site Type	<ul style="list-style-type: none"> • C — Clinic • H — Hospital • I — Insurance
Aging Bucket	“Bracket” for the elapsed time since the request was created.

STAT Summary

Shows the number and page count of STAT requests handled by Client Service Representatives at each facility captured in the report. Also shows the number of non-STAT requests processed by each CSR in the same period at those facilities.

This report offers a **User Name** filter.

STAT Summary

Last Updated Timestamp: 11/10/2020 11:39:19 AM [Bookmark](#)

Date: 11/11/2020 - 11/19/2020

Site: No filter

Dashboard Group: No filter

Req Class: Core ROI

Health System: No filter

Requester Class: No filter

User Name: No filter

Site Type: No filter

STAT Summary

Health System	STAT Request Count	STAT Request Page Count	Request Count
...	1,642	21,831	100
Undefined	1,642	21,831	100
...	1,059	10,441	69
andie...	160	3,314	2
ashley...	11	11	1
barbara...	22	608	1
chris...	12	12	2
christopher...	143	179	8
jennifer...	58	387	29
jessie...	52	52	2
jody...	4	900	1
julie...	20	20	4
michelle...	196	196	8
shabana...	43	188	3
sunira...	36	36	2

Export to Excel

Filter Active Reset Total amount: --

Detail Reports

Click a row to open a detail report.

Production Dashboards

What do they show?

Logging and Fulfillment tasks performed by individual HealthSource Clarity users.

Additional filters

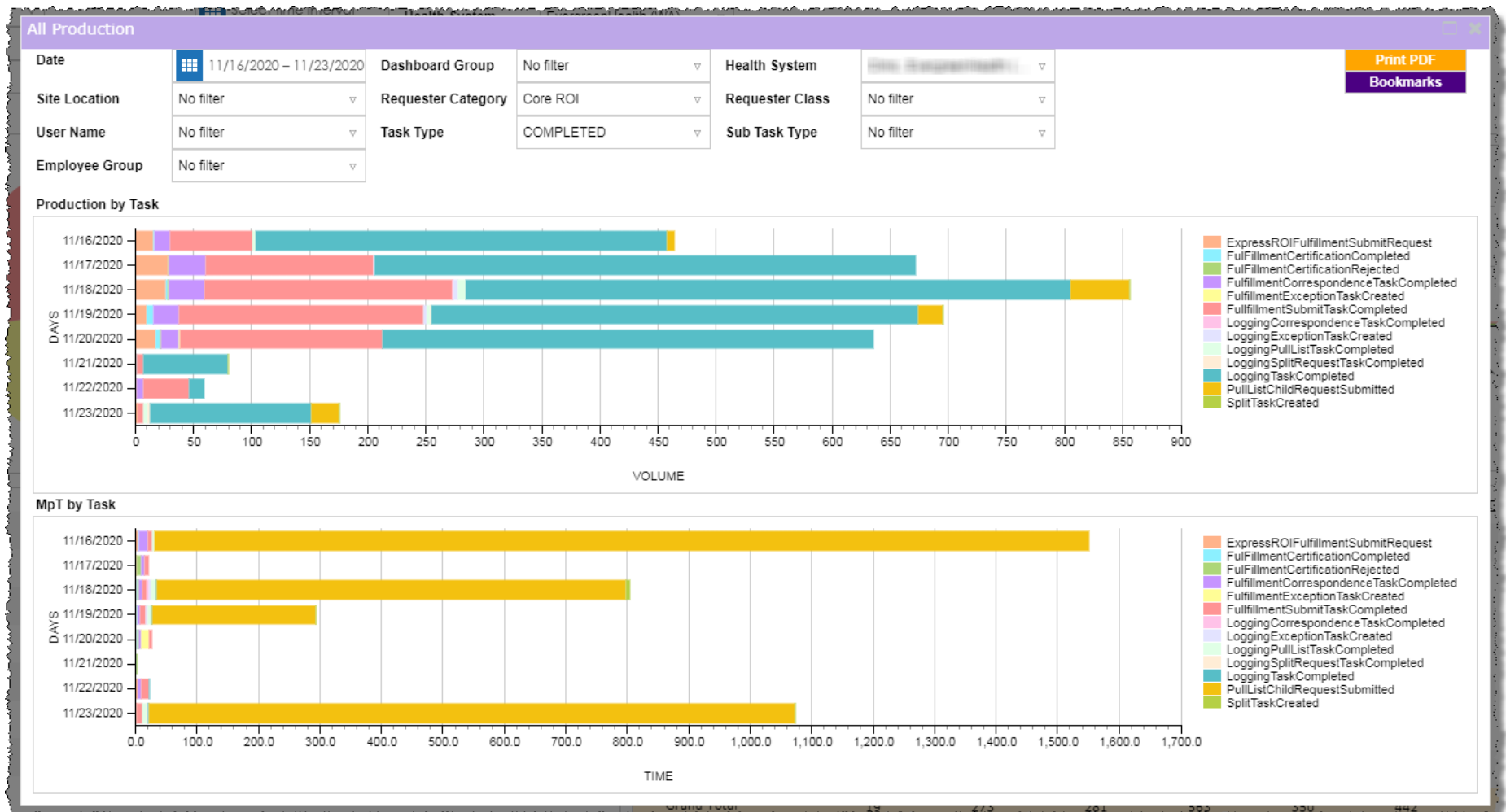
In addition to the normal filter options, the **Production Dashboards** offer these choices:

Filter	Available for			Purpose
	All Production	Fulfillment Production	Logging Production	
User Name	✓	✓	✓	Limits the report to specific user(s).
Employee Group	✓		✓	Focus on Centralized Logging or Non-Centralized Logging operations.
Task Type	✓	✓	✓	Limits the report to specific activities performed by HealthSource Clarity users.
Sub Task Type	✓	✓	✓	

All Production Dashboard

This dashboard shows:

- how many Logging and Fulfillment tasks were performed on each day in the report period;
- how many minutes (MpT) were spent performing Logging and Fulfillment tasks on each day in the report period.



Fulfillment Production Dashboard

This dashboard shows:

- how many Fulfillment tasks were performed on each day in the report period;
- how many minutes (MpT) were spent performing Fulfillment tasks on each day in the report period.



Logging Production Dashboard

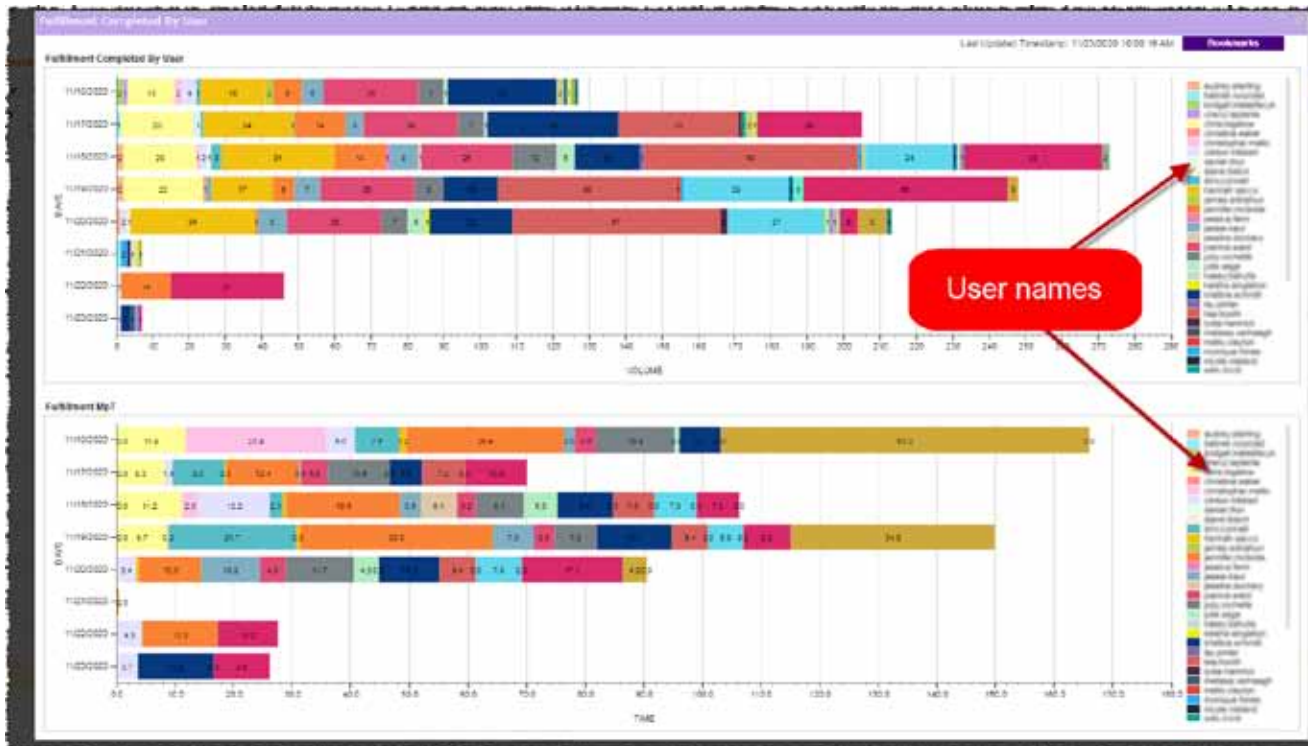
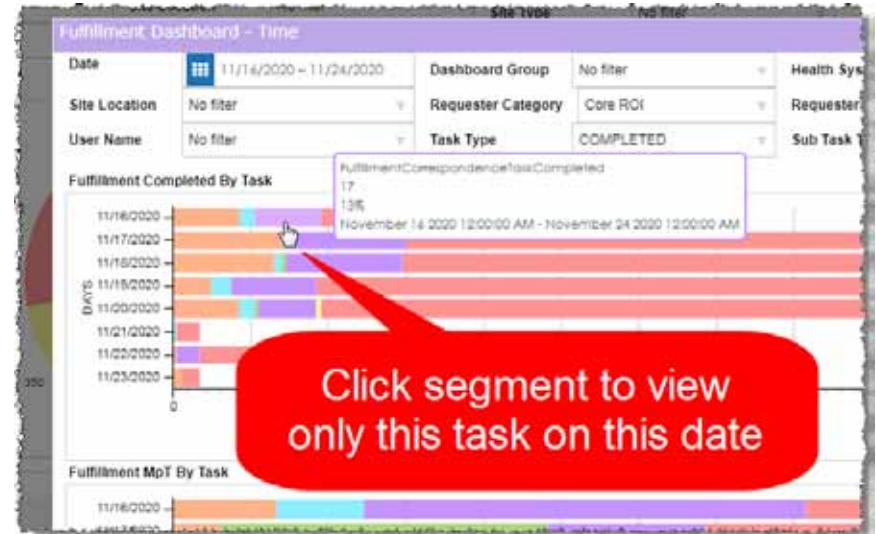
This dashboard shows:

- how many Logging tasks were performed on each day in the report period;
- how many minutes (MpT) were spent performing Logging tasks on each day in the report period.



Task by user reports

Click a segment of a horizontal bar on any **Production Dashboard** to see how many tasks of that type, on that day, were performed by individual users.



Detail reports

After opening a **Task by user** report ([page 54](#)), click any segment of a horizontal bar to see the **Detail Reports** window.

All of these reports show activity on a single day for a single user.

Detail Report	Purpose
Detail — Selected	Lists details about the requests for which the user performed the specific task.
Production by User — All	Summarizes the number of times the user performed the task on the selected day.
Production by Task, by Site and User — All	Only available for All Production dashboard. Shows the tasks performed by the user, broken down by site.
Production Task by Site and User — All	Available for Fulfillment Production and Logging Production dashboards. Shows the number of tasks of the selected type performed by the user, broken down by site.
Production by Task — All	Summarizes the number of times the user performed the task on the selected day. Unlike Production by User , this report shows the task name.
Detail — All	Largely indistinguishable from Detail — Selected .
Production by Requester — All	Shows the number of tasks of the selected type performed by the user, broken down by Requester Type.
MpT By User — All	Summarizes the time, in minutes, spent performing the task.
MpT by Task — All	Summarizes the time, in minutes, spent performing the task. Unlike MpT by User , this report shows the task name rather than the date.
MpT by Requester — All	Summarizes the time, in minutes, spent performing the task, broken down by Requester Type.

See [page 57](#) for descriptions of the columns in these reports.

Data Values

This section defines all the data values used in any of the HealthSource Clarity Dashboards and Reports.

Value	Definition
% Completed Under 24 Hrs	(# of requests logged in 24 hours or less from receipt) ÷ All requests received
Audit	Data and images for the request are ready to be evaluated by a specialist at Ciox Health's ROI processing center in Alpharetta, GA.
Average	(TAT for all requests in report) ÷ (# of requests).
Billable	Request for which the requester can be charged.
Billable	Y unless Non-Billable Reason selected
Chart Location	Where, at the facility, the Medical Records were physically stored.
Correspondence Sent	Requester notified of a problem with the Request Letter or an inability to locate the Medical Records.
Customer Creation	Logger sent the request to the New Requester Creation Team.
DDS State	State from which Disability request originated
Delivered	If Delivery Method provides confirmation, Y and N are true statements. For USPS 1st class mail, Y = Sent.
Delivery Date	Status = Delivery. Means Ready for Delivery or Invoiced for Prepayment, not Delivered
Delivery Method	How the Medical Records were sent to the requester. See page 39 for a list of values.
Delivery	Ciox Health has finished all work needed to send Medical Records to the requester. Does NOT mean that the requester received the Medical Records,
Due Date	HealthSource calculates this date for some Request Types
Electronic Pages	As entered by Fulfiller
eRequest ID	HealthSource identification #

Value	Definition
Exceptions	Request has been routed for special handling because it failed automatic validation or was manually routed for review by a specialist at the ROI Processing Center in Alpharetta, GA.
Fac Rcvd to Delivery	Facility Received Date TO Status = Delivery
Fac Rcvd to Fulfillment	Facility Received Date TO Status = Fulfillment
Fac Rcvd to Index	Facility Received Date TO Status = Indexing
Fac Rcvd to Intake	Facility Received Date TO Request created
Fac Rcvd to Intake	Facility Received Date TO Request Created Date
Fac Rcvd to Invoice	Facility Received Date TO Status = Invoicing
Facility Received Date	When the request was available for Logging
Facility Received Date	Request Letter arrived at facility
File Status	Applies when Source = Central Intake, shows the state of the NLP process for the Request Letter.
Fulfillment Date	Status = Fulfillment
Fulfillment on Hold	Fulfiller paused work on the request.
Fulfillment Processing	Status = Fulfillment TO Status = Indexing
Fulfillment to Delivery	Status = Fulfillment TO Status = Delivery
Fulfillment to Index	Status = Fulfillment TO Status = Indexing
Fulfillment to Index	Status = Fulfillment TO Status = Indexing
Fulfillment to Invoice	Status = Fulfillment TO Status = Invoicing

Value	Definition
Fulfillment	Logger has finished with request. Medical Records need to be captured.
Fulfillment TAT	Time between a request reaching Ready to Fulfill and Packaging in Progress.
Group ID	For Ciox Phoenix requests
Index to Delivery	Status = Indexing TO Status = Delivery
Index to Invoice	Status = Indexing TO Status = Invoicing
Indexing Date	Status = Indexing
Indexing to Invoice	Status = Indexing TO Status = Invoicing
Intake Date	Request created in HealthSource
Intake Processing	Status = Logging TO Status = Fulfillment
Intake TAT	Time between Facility Received Date and Intake Date.
Intake to Delivery	Request Created Date TO Status = Delivery
Intake to Delivery	Request created TO Status = Delivery
Intake to Fulfillment	Request Created Date TO Status = Fulfillment
Intake to Fulfillment	Request created TO Status = Fulfillment
Intake to Index	Request Created Date TO Status = Indexing
Intake to Invoice	Request Created Date TO Status = Invoicing
Inventory	Amount of requests that have not yet been completed.

Value	Definition
Invoice Processing	Status = Indexing TO Status = Delivery
Invoice to Delivered	Status = Invoicing TO Status = Delivered
Invoice to Delivery	Status = Invoicing TO Status = Delivery
Invoicing Date	Status = Invoicing
Invoicing	Bill (invoice) for request is being prepared. Includes Pre-Bill invoicing, in which payment must be received before we deliver the records.
Lawson Site Name	Name of site from customer database.
Location	Site name.
Location ID	Site number.
Logging on Hold	Logger paused work on the request.
Logging	Request needs to be logged.
Major Class	Over-arching category for requesters.
Max	Longest TAT for any request in report.
Micro Pages	As entered by Fulfiller
Min	Shortest TAT for any request in report.
MpT	Minutes per Task
New Requester	Requester not found in database and request routed to New Requester team.
Page Count is Known	Used when the request is paid for on-site.

Value	Definition
Paper Pages	As entered by Fulfiller
Pricing	Cost of request is being calculated.
Region	As defined in Lawson.
Request Cancelled	HealthSource user deleted the request.
Request Letter Date	Date letter created by requester
Request Type	Category of the request. Different Request Types have different data entry rules and workflows.
Request Type	As selected during Logging
Requester Type	Different Requester Types have different data entry rules and workflows.
Requestor Class	Major Class
Requestor Name	Name from customer database
Requestor Type	From customer database
Site Intake Processing	Request created TO Logging
Source	Central Intake: Faxed to central processing Payor: Ciox Phoenix
Split Completed	Single request has been divided into multiple requests, each with a Status of Logging.
Split	Single request needs to be divided into multiple requests.
Status	Current Status
StdDev	Standard Deviation of requests in report.

Value	Definition
TAT 24 Hours	Request logged in 24 hours or less from the time it was received.
TAT Over 24 Hours	More than 24 hours passed between the request being received and logging.
Turn Around Time (TAT)	How long a request spent moving from one status to another. Units of measure can be days or hours. Most commonly used to measure how much time elapsed between receiving a request (Intake Date) and delivering the Medical Records, but can use other start / stop points.
Undefined	Request has not yet been associated with a Requester Type and therefore cannot be categorized for reporting purposes.
Unknown Error	Indeterminate problem with request.
Work in Process	Requests that have not yet been completed.
Zone	As defined in Member Admin.