HealthSource Clarity

v1.3.1 Release Notes

January 2019

Document History

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Contact Information

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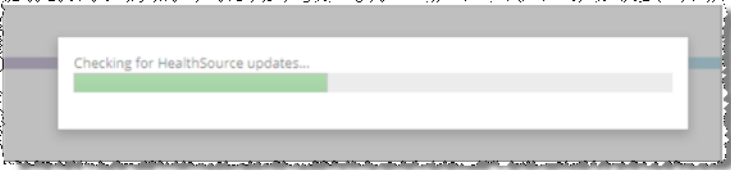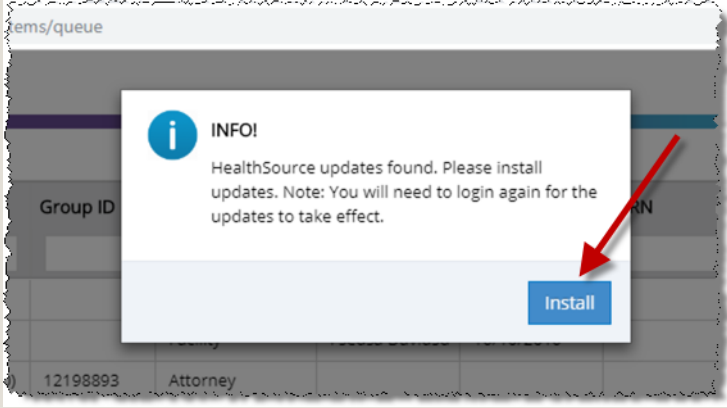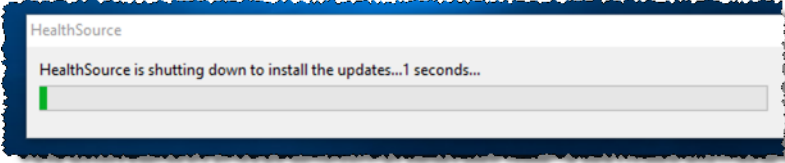Customer Care Phone Number: 877-358-6939

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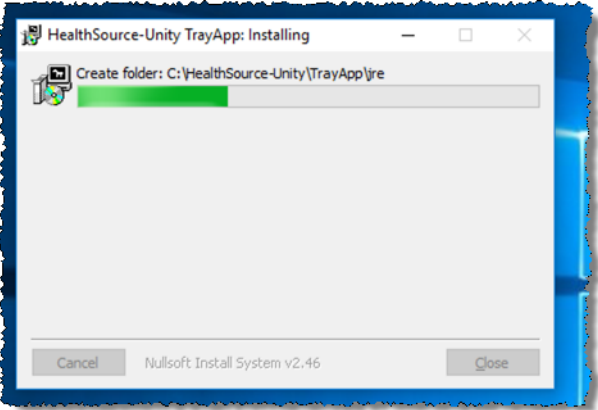
HealthSource Clarity v1.3.1 Release Notes
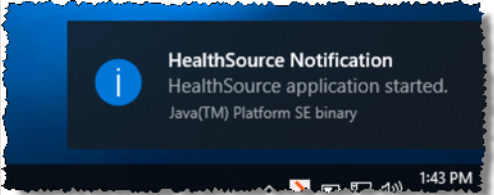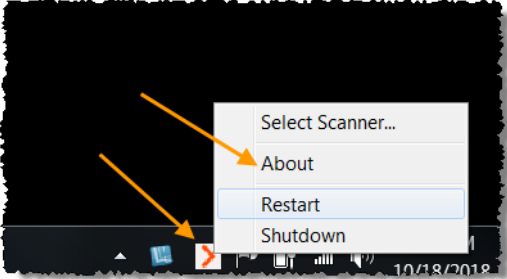
This document describes changes made in **HealthSource Clarity v1.3.1**.

TRAYAPP UPDATE REQUIRED

To use **HealthSource Clarity v1.3.1**, you **MUST** update the **TrayApp**.

Log into **HealthSource Clarity** and wait until the **Update** bar closes.	Checking for HealthSource updates...
Click **Install** on the **Info** box.	INFO! HealthSource updates found. Please install updates. Note: You will need to login again for the updates to take effect. Install
HealthSource Clarity logs you out.	
Close your browser completely.	
The **TrayApp** shuts down automatically. This step happens so quickly you may not see the popup window.	HealthSource HealthSource is shutting down to install the updates...1 seconds...
HealthSource Clarity downloads and validates the new version of the **TrayApp**.	HealthSource 59% complete Validating . .

The **TrayApp** update installs itself.	
The updated **TrayApp** starts itself.	
Right-click the **TrayApp** in your **Windows Tray** and select **About**.	
Does the **Build No** = 2400? • **YES** — Click **OK**. • **NO** — Contact Customer Care at 877-358-6939.	

MULTIPLE USERS CAN FULFILL A REQUEST

IF a **Client Service Representative** (**CSR**) adds Medical Records to a request;

AND saves the request using one of these commands:

- Save and Close

- Put On Hold

- Exception

- Pend

BUT the request is later opened by a different **CSR**;

THEN the original Medical Records are **RETAINED**;

AND the second **CSR** can add more Medical Records and edit any records that were attached to it by the original **CSR**.
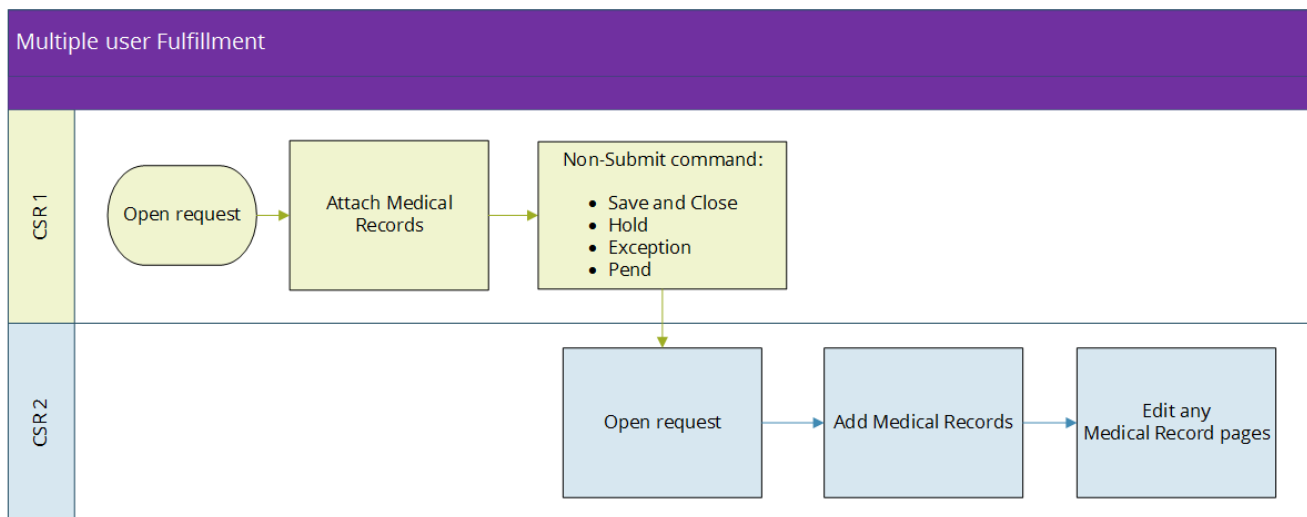
Previously, a **CSR** who opened a request which already included Medical Records could either delete those pages or close the request without working on it. There was no way to add more records to the request.

Frequently Asked Questions about multiple user Fulfillment

Can two users work on the same request at the same time?

No.

You cannot add or edit Medical Records to a request that is currently being worked on by another user. This new feature allows sequential, not concurrent, access.

Can more than two users fulfill the same request?

Yes.

The example on page 6 used two people to keep things simple, but there's no technical limit to how many people can add / edit Medical Records for the same request.

Can I edit Medical Records attached by someone else?

Yes.

After you open a request, you have full control over all of the Medical Record pages, no matter who attached them.

What about requests that had Medical Records before v1.3.1?

If you open a request to which another user attached records **BEFORE** the release of **v1.3.1**, you'll still be prompted to reset (delete existing pages) or close it.

Does the new feature let me edit requests put On Hold by someone else?

No.

Only the person who puts a request **On Hold** can open it for editing. After the **Hold** is removed, another user can add / edit Medical Records.

Can I modify Medical Records after the request is submitted?

No.

Once a request has been successfully submitted, no one can change the Medical Records associated with it.

UPLOAD OF MEDICAL RECORDS BEFORE REQUEST SUBMISSION

We now transmit any Medical Records attached to a request when a **CSR** uses these commands during **Fulfillment**:

- Save and Close

- Put On Hold

- Exception

- Pend

Previously, no Medical Record pages were transmitted until the request was submitted.

This change speeds up submission, since some pages have already been uploaded. It also reduces the chance of losing work due to a problem with a local workstation.
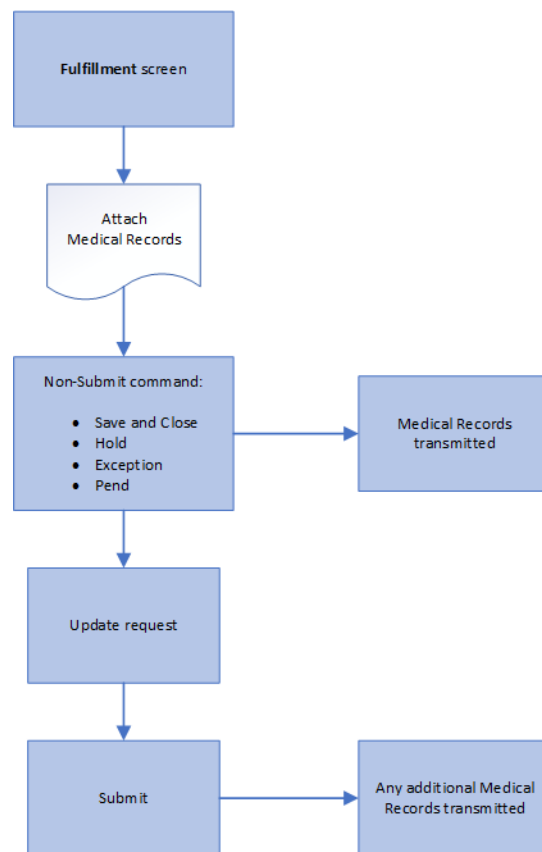
What about requests that weren't submitted before v1.3.1?

Any requests that included Medical Records before **v1.3.1**, but which had not yet been submitted, must be opened again so that the existing records can be transmitted.

The new "intermediate" upload will occur if you then use the **Save and Close**, **Hold**, **Exception**, or **Pend** commands. Of course, you can also open the request and **Submit** it, which will upload the original pages along with any new ones.

For example:

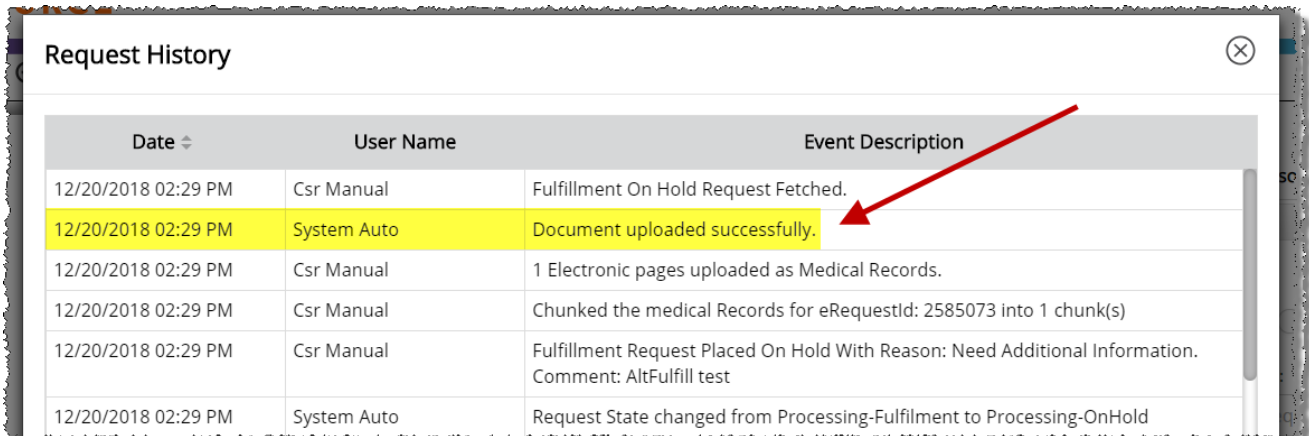1. You attached Medical Records to request 1234567 on December 29, 2018.

2. You place the request **On Hold**.

3. After **v1.3.1** goes live, the request remains in a status of <u>Fulfillment On Hold</u>. The Medical Records are **NOT** automatically transmitted.

4. You remove the **Hold**. It doesn't matter if you make any other changes to the request.

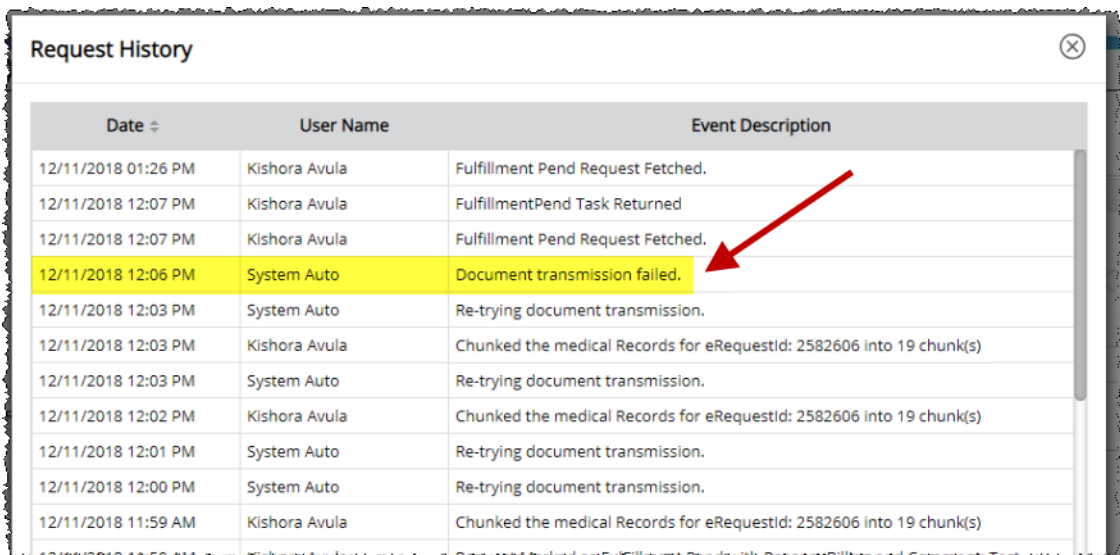5. The Medical Records are transmitted.
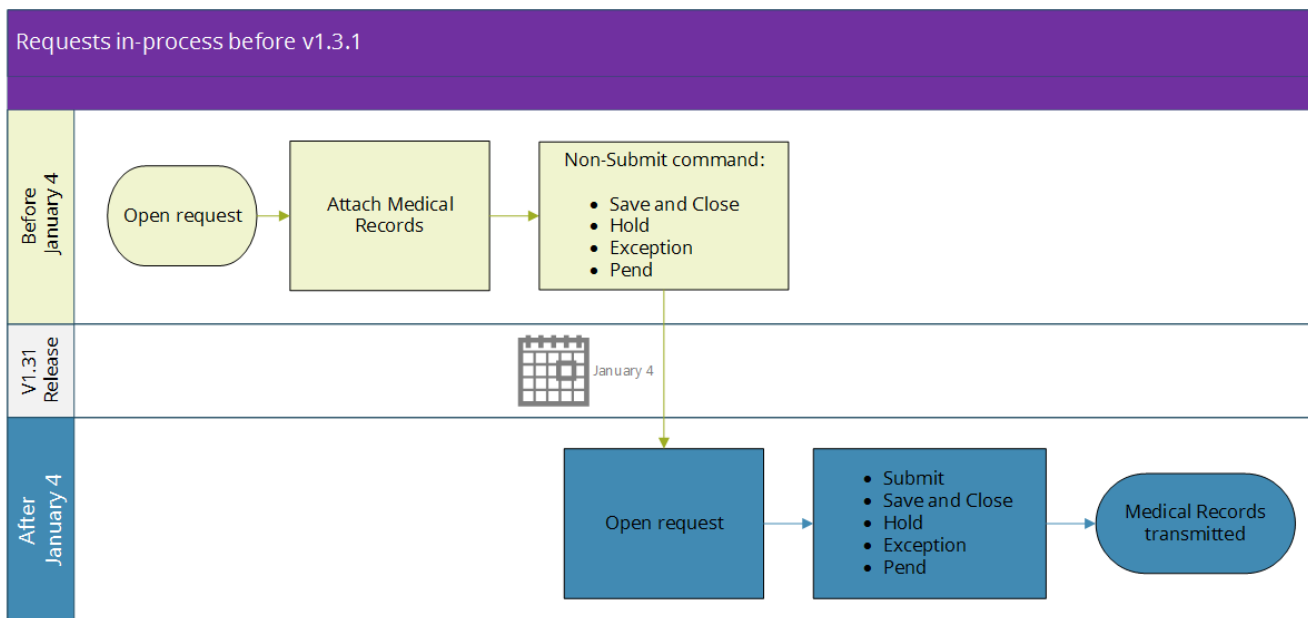
Track "intermediate" Medical Record transmissions

The **Request History** shows any Medical Records that were transmitted before the request was finally submitted. The **Event Description** = Document uploaded successfully.

Request History			⊗
Date ⇕	User Name	Event Description	
12/20/2018 02:29 PM	Csr Manual	Fulfillment On Hold Request Fetched.	
12/20/2018 02:29 PM	System Auto	Document uploaded successfully.	
12/20/2018 02:29 PM	Csr Manual	1 Electronic pages uploaded as Medical Records.	
12/20/2018 02:29 PM	Csr Manual	Chunked the medical Records for eRequestId: 2585073 into 1 chunk(s)	
12/20/2018 02:29 PM	Csr Manual	Fulfillment Request Placed On Hold With Reason: Need Additional Information. Comment: AltFulfill test	
12/20/2018 02:29 PM	System Auto	Request State changed from Processing-Fulfilment to Processing-OnHold	

If the "intermediate" upload was not successful, the **Event Description** = Document transmission failed.
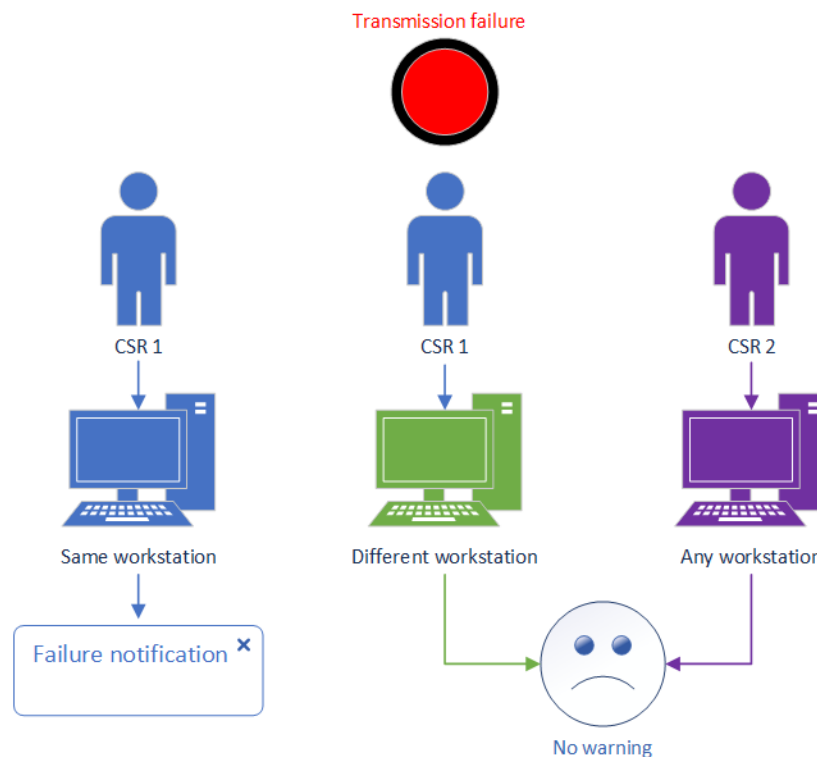

Request History			⊗
Date ⇕	User Name	Event Description	
12/11/2018 01:26 PM	Kishora Avula	Fulfillment Pend Request Fetched.	
12/11/2018 12:07 PM	Kishora Avula	FulfillmentPend Task Returned	
12/11/2018 12:07 PM	Kishora Avula	Fulfillment Pend Request Fetched.	
12/11/2018 12:06 PM	System Auto	Document transmission failed.	
12/11/2018 12:03 PM	System Auto	Re-trying document transmission.	
12/11/2018 12:03 PM	Kishora Avula	Chunked the medical Records for eRequestId: 2582606 into 19 chunk(s)	
12/11/2018 12:03 PM	System Auto	Re-trying document transmission.	
12/11/2018 12:02 PM	Kishora Avula	Chunked the medical Records for eRequestId: 2582606 into 19 chunk(s)	
12/11/2018 12:01 PM	System Auto	Re-trying document transmission.	
12/11/2018 12:00 PM	System Auto	Re-trying document transmission.	
12/11/2018 11:59 AM	Kishora Avula	Chunked the medical Records for eRequestId: 2582606 into 19 chunk(s)	

What if the transmission fails?

In some cases, the "intermediate" upload of Medical Records may fail. We make five (5) attempts before declaring a transmission failure.

If a transmission failure occurs, you **MAY** or **MAY NOT** be warned:

Who opens request	Opened on...	Warned of failure?
You	Same workstation	Yes
You	Different workstation.	No
Someone else	Doesn't matter.	No

You can see failures on the **Request History** (page 10). If you suspect that a failure occurred, check with the **CSR** who worked on the request before you. We plan to add notifications for all users, regardless of workstation, in the near future.

UPDATED MY WORK QUEUE

We've removed the blue and white arrow from **My Work Queue**.

New	Old
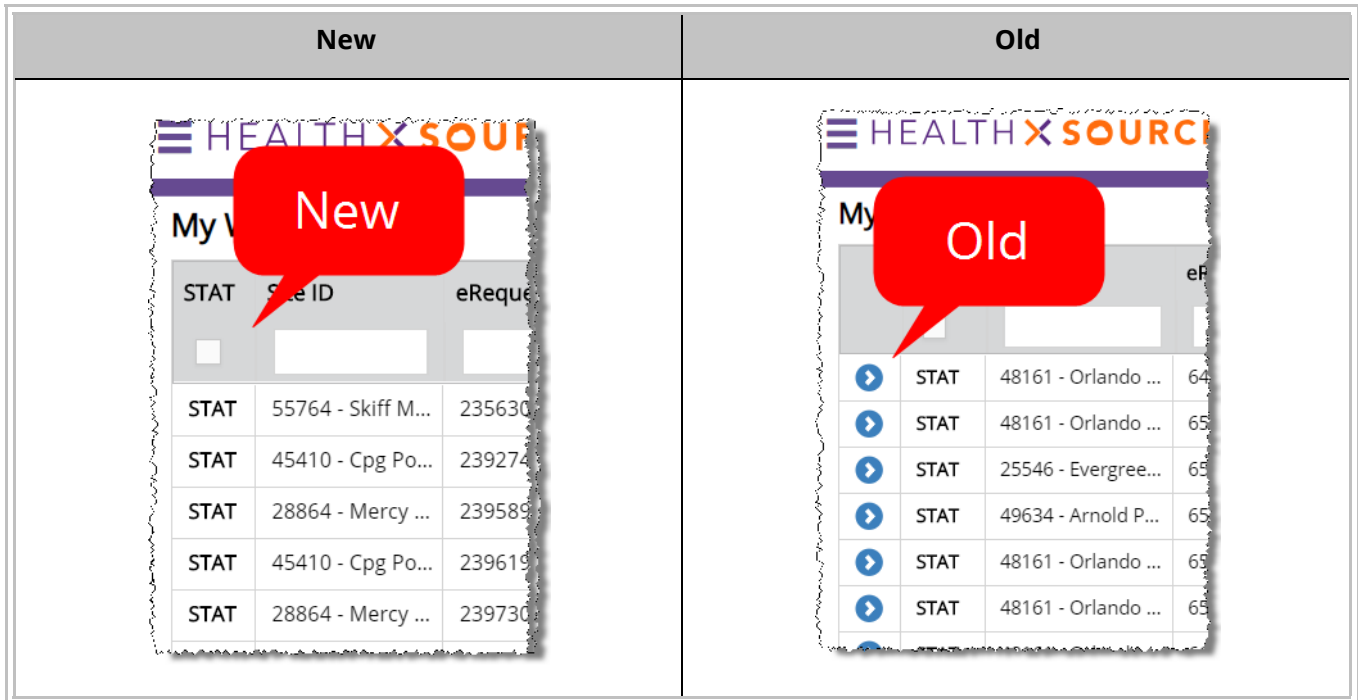
This arrow appeared in the first column of **My Work Queue** in previous versions of **HealthSource Clarity**.