

HealthSource Clarity v1.3 Release Notes December 2018



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HealthSource Clarity v1.3 Release Notes

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You **DON'T** need to install an updated **TrayApp** to use v1.3.

An update will be required for the upcoming v1.3.1 release.



New Client Service Representative Role

The new **Client Service Representative** (CSR) role replaces four roles:

- Logger
- Fulfiller
- Logger Supervisor
- Fulfiller Supervisor

This change reflects feedback from the field. Most **HealthSource Clarity** users need to log requests **AND** capture Medical Records.





One role per user

With the release of v1.3, a user can only be assigned to one role.

Migration of existing users

Ciox Health will automatically switch users with the "obsolete" roles to the **CSR** role as part of the v1.3 deployment.

Users who were assigned to an obsolete role **AND** a higher-level role, such as **Account Manager**, will be migrated to the higher-level role **ONLY**.

Central Intake roles

The **Logger Centralized** and **Logger Centralized Supervisor** roles are still available. These roles are used exclusively at Ciox Health Central Intake facilities.



CSR Permissions

Permission	Allowed	Not allowed
Open requests with Task Type :		
• Logging	✓	
Logging On Hold	✓	
Logging Exception	✓	
Logging QC		X
• Fulfillment	✓	
Fulfillment On Hold	✓	
Fulfillment Exception	✓	
Fulfillment QC		X
Approve for Fulfillment / Delivery	✓	
Certify request	✓	
Send request to New Requester team	✓	
Split request	✓	
Run reports	✓	
Run Request Search	✓	
View Request Subway		X
View My Dashboard	✓	
View My Work Queue	✓	
Add new request	✓	
Enter STAT requests	✓	
Upload Request Letters	✓	
Upload Indirect Chase files		X
Add new requester		X
Administration menu		X
Process Motion to Quash (MTQ) requests	✓	



New LANDING PAGES

HealthSource Clarity now opens to landing pages that help you get to work more quickly.

Role	Landing Page	See page
Client Service Representative	My Dashboard	8
Logger Centralized	My Dashboard	11
Logger Centralized Supervisor	My Dashboard	12
Account Management		
Business Office		
Ciox Executive		N/A
Customer Service	Request Search	The Request Search page is blank for these users, since we can't
External Management		they need to find.
Group Administrator		
Internal Management		
New Requester	Request Search	16

This change cuts down the number of keystrokes and clicks needed to start working:

- Users who land on **My Dashboard** can simply load the next work item, without evaluating the data on **My Work Queue**.
- Users who don't normally process requests land on **Request Search**, since that's the tool they work with most often.

My Work Queue, which was the landing page before v1.3, is still available from the **Menu**.



My Dashboard — CSR

The **Dashboard** for a **Client Service Representative**:

- Allows the **CSR** to immediately log or fulfill the next available request;
- Shows the current inventory of **Pended** and **Exception** requests.



Log Request and Fulfill Request buttons

Fetches requests with a Task Type of					
Log Request	Fulfill Request				
	Fulfillment				
Logging	Approval for Fulfillment				
	Approval for Delivery				



Charts for CSR Dashboard

These charts provide a visual representation of two categories of request:

- **Requests In Pend**. Requests can only be pended from the **Fulfillment** step. See page 23 for more information on the new **Pend** option.
- **Requests In Exception**. Switch between **Logging Exception** and **Fulfillment Exception** requests by selecting the desired tab above the **Display By** options.

Time period

The charts show requests over the last 30 days.



Display By options

- **Reasons** the **Reason** selected when the request was **Pended** or flagged as an **Exception**. This option is selected by default.
- Request Types
- Due Date



View request details

To see more information about the requests captured in a chart:

1. Click the appropriate "pie slice." In the example below, we've clicked in the **Billing** category on the **Requests In Pend** chart.



2. The **Request Search** page opens, with the requests in the selected category listed on the **Search Results** table.

	-Select an opt	tion- 🗸						Disp	laying 1 - 2 of 2 iter
	Site ID	eRequest ID Group ID	Requester Name	Requester Type	Patient Name	DOB	Received Date 🔺	Days Due	 Task Type
	03919 - Pi	2517150	CONTINUING CA	Continuing Care	ananita na	10100110021	11/26/2018	2 Over	Fulfillment Pend
1	03919 - Pi	2522347	ALBANY MEDICA	Facility	Topics: Topic	1010011002	11/27/2018	9	Fulfillment Pend

- 3. Review the request details.
- 4. To open a request, click the **BLUE NUMBER** in the **eRequest ID** column.



My Dashboard — Centralized Logger

The **Dashboard** for a **Centralized Logger**:

- Allows the **Centralized Logger** to immediately log the next available request;
- Shows requests placed **On Hold** by the **Centralized Logger**.

	My Ho	ld(s)						
		STAT	Site ID	eRequest ID	Batch ID	Received Date	Task Type	Reason
						mm/dd/yyyy	Select Task 🔻	Select Reason 🔻
	0		13270 - Demo Site	1775241		07/07/2017 10:35 AM	Logging On Hold	Need Additional Infor
	Ð		13270 - Demo Site	2160299		09/26/2018 06:07 AM	Logging On Hold	Need Additional Infor
	Ð		03919 - Piedmont Newnan Hospital	2239923		09/29/2018 02:47 PM	Logging On Hold	Need Additional Infor
	0		13270 - Demo Site	2507308		11/14/2018 04:25 PM	Logging On Hold	Need Additional Infor
ggercentralized	O		13270 - Demo Site	2507596		11/15/2018 12:03 PM	Logging On Hold	Need Additional Infor
anual	Ð		03919 - Piedmont Newnan Hospital	2512905		10/09/2018 03:39 AM	Logging On Hold	Need Additional Infor
l Specialist	O		03919 - Piedmont Newnan Hospital	2513560		11/21/2018 09:47 AM	Logging On Hold	Need Additional Infor
Role(s)	0		03919 - Piedmont Newnan Hospital	2513620		11/21/2018 10:22 AM	Logging On Hold	Need Additional Infor
.ogger Centralized								
	14	A Dog						Total ita

Log Request button

When a **Centralized Logger** clicks the L**og Request** button in the lower right corner of the **Dashboard**, we automatically open the next available request with a **Task Type** of <u>Logging</u>.



My Dashboard — Centralized Logger Supervisor

The Dashboard for a Centralized Logger Supervisor:

- Allows the Centralized Logger Supervisor to immediately log the next available request;
- Shows a graphic view of **Exception** requests;
- Breaks down the current inventory of requests by **Due Date**.



Log Request button

When a **Centralized Logger Supervisor** clicks the **Log Request** button in the lower right corner of the **Dashboard**, we automatically open the next available request with a **Task Type** of <u>Logging</u>.



Requests in Exception chart

This chart shows all requests that have been flagged as **Exceptions**.



Time period

The chart shows requests over the last 30 days.

Display By options

- **Reasons** the **Reason** selected when the request was flagged as an **Exception**. This option is selected by default.
- Request Types



Requests — Days Until Due chart

This chart shows how many requests are due for delivery within five time periods:

- Overdue (Due Date has passed)
- Due within 0-3 days
- Due within 4-7 days
- Due in more than 7 days
- Not Available (no Due Date)



Time period

The chart shows requests over the last 30 days.



View request details

To see more information about the requests captured in a chart:

1. Click the appropriate "pie slice." In the example below, we've clicked in the **Field Input Required** category on the **Requests In Exception** chart.



2. The **Request Search** page opens, with the requests in the selected category listed on the **Search Results** table.

Reasons:	• •	S	earch Re	sults									
Field Input Required	·		-Select an op	tion- 🗸						\square		Discoving 1	16 of 16 itom
Request Type:												Displating	- To of To item
- Select Request Type -			Site ID	eRequest II	Group ID	Requester Name	Requester Ty	Patient Name	DOB	Received Dat	Days Due	 Task Type 	Reason
equester Type:			13270	2107223								Logging E	Field Inpu
- Select Requester Type -	ה		40784	1879293								Logging E	Field Inpu
	-		13270	2524326								Logging E	Field Inpu
equester Name:	- II I		03919	2386000		BAINBRIDGE D	Attorney	Johns Smi		05/02/2018	111 Over	Logging E	Field Inpu
			46815	1684667		HP NEWTON W	Facility	OFIN GM		06/01/2018		Logging E	Field Inpu
equester Number:			46815	1801893						07/27/2018		Logging E	Field Inpu
			13270	1856819						08/29/2018		Logging E	Field Inpu
iroup ID:			03919	1871761	11430274	TEST INTERME	Governme			09/14/2018	46 Over	Logging E	Field Inpu

- 3. Review the request details.
- 4. To open a request, click the **BLUE NUMBER** in the **eRequest ID** column.



Request Search — New Requester landing page

Users assigned to the **New Requester** role automatically land on the **Request Search** page after logging in.

We filter the **Search Results** to show **ONLY** requests with these **Task Types**:

- New Requester
- Fulfillment New Requester

equest Search <	Search	n Results						
itient Last Name:	-Select	an option- 🗸						Displaying 1 - 56 of 56 it
itient First Name:	Site ID	eRequest ID Gro	oup ID Requester Name	Requester Type	Patient Name	DOB	Received Date	Days Due 🔰 Task Type 🔺
	45410) - C 1684988					06/08/2018	New Requeste
	45410) - C 1685014					06/09/2018	New Request
tient DOB:	45410) - C 1685023					06/09/2018	New Request
m/dd/yyyyy	45410) - C 1685062					06/09/2018	New Request
e Lo	10) - C 1685086					06/09/2018	New Request
Task Type alread	dy 🛛) - C 1769519	auto	Attorney	kfkfkfk jjdjdjjd		07/17/2018	New Request
selected	Id) - C 1769523	test	Facility	tesing tesing		07/17/2018	New Reques
5ele	.70) - D 1773076					07/19/2018	New Reques
quest Status:	55764	4 - S 1773342	AFFINITY HEALT	Facility	FNAME_PERFT		07/23/2018	New Reques
ew Requester 🔻	45410) - C 1787971		Facility			07/24/2018	New Reques
wart Type:	45410) - C 1788495					07/25/2018	New Reques
clest Type:	55764	I - S 1788707	AFFINITY HEALT	Facility	FNAME_PERFT		07/23/2018	New Reques
select Request Type -	55764	I - S 1801835	AFFINITY HEALT	Facility	FNAME_PERFT		07/23/2018	New Reques
Q Search Clear			ACCINITY LICAL T		CHANG DEDET		07/00/0040	



BETTER LOADING OF "NEXT" REQUEST

We've improved how we "fetch" the next request when a **Client Service Representative** clicks one of the **... and Next** buttons:

- Submit and Next (for both Logging and Fulfillment)
- Hold and Next
- Exception and Next
- **Pend and Next** (new in v1.3)
- Escalate and Next (new in v1.3)

Task Type	Will be fetched for the CSR?
Logging	Yes, if the request isn't already open for another user.
Logging On Hold	No
Logging Exception	No
Logging Quality Control	No
Redo Logging	No
Fulfillment	Yes, if the request isn't already open for another user.
Fulfillment On Hold	No
Fulfillment Exception	No
Fulfillment Pend	No
Approval for Delivery	Yes, if the request isn't already open for another user.
Approval for Fulfillment	Yes, if the request isn't already open for another user.



REQUEST LETTER AUTOMATICALLY DISPLAYED FOR FULFILLMENT

When a request is opened for **Fulfillment**, the Request Letter now automatically appears in the **Documents** window.

To add Medical Records to the request, click the **Medical Records** button on the left side of the **Documents** window.



This change was made in response to feedback from field users, who told us that opening the Request Letter through the ... (**More Actions**) command took too much time.



EXPRESS ROI

A single **CSR** can now quickly create a new request and attach Medical Records to it. This new process supports the field's need to handle high-priority on-site requests.



Previously, a request was placed "at the back of the line" after **Logging**. Too much time might pass before the request would be automatically presented for **Fulfillment**.





Express ROI instructions

- 1. From the **Menu**, click **Add New Request**.
- 2. The **Logging** screen appears.
- 3. Attach the Request Letter and enter all required data.
- 4. Click the arrow to the right of the **Submit and Next** button.



5. Click Submit and Fulfill.



6. The **Fulfillment** screen opens, with the Request Letter automatically displayed (page 18).





- 7. Click the **Medical Records** button to the left of the **Document** window.
- 8. Attach the Medical Records.

ues	↑ ↓ 0 /0	ΦQ	Fit Width 🔻 🛛 🖉 👗	ļ
issu	Medical Records			7
issu				Į
ed re				1
ed r	E			1
ved				
ted	興			ł
) RITE			<u>M</u>	1
(mar		An dealer an article	<u>i Iui</u>	2

- 9. Select the appropriate onsite **Delivery Method**:
 - 9.1 CD
 - 9.2 DVD
 - 9.3 Faxed
 - 9.4 Flash Drive
 - 9.5 Walk-In
- 10. Fill out any other required data entry fields, then click **Submit and Next**.







REQUEST SEARCH CHANGES

We've changed the **Request Search** tool fields:

Request Search Facility Received Date: From 05/29/2018 To 11/29/2018 ID: eRequest ID Enter ID here Patient Last Name:	ID	 Choose one of three options: eRequest ID LogID Invoice A blank box appears below the ID field after you choose. Enter the "target" ID value in this box.
Patient DOB: mm//dd/yyyy Site Location: C Task Type Category:	Task Type Category	Lets you choose a "group" of Task Types , like <u>Logging</u> or <u>Fulfillment</u> . You MUST pick a Task Type Subcategory before you can click the Search button.
Logging Task Type Subcategory: Logging Request Type: - Select Request Type -	Task Type Subcategory	Actual Task Type values, based on the selected Task Type Category . If you choose a Task Type Category , you MUST pick a subcategory.
Requester Type:	Requester Type	Search by the Requester Type assigned to a request, like <u>Attorney</u> or <u>Insurance</u> .



PEND REQUESTS

The new **Put on Pend** command is available for requests with these **Task Types**:

- Fulfillment
- Fulfillment On Hold
- Fulfillment Exception

Purpose

We added the **Pend** command in response to feedback from field users, who told us that they needed something other than the **Hold** and **Exception** commands.

Command	Use when
Pond	• You can't capture the Medical Records because of issues beyond your control, such as their being located at another site, stored in a format that is not accessible to you, or because the patient is still being treated.
Pena	• You can capture the Medical Records, but the request should not be submitted until another step occurs. This step might be the approval of the HIM department or a physician, the expiration of a Motion To Quash period, or something similar.
Hold	You need to stop working temporarily and don't want anyone else to handle this request.
Excention	You can't decide how to process this request.
Exception	It needs to be handled by a specialist or a manager.



Pend instructions

1. Click the **Alarm Clock** at the top of the **Fulfillment** screen.



- 2. The **Place On Pend** popup appears.
 - 2.1 Select the appropriate **Pend Reason**. These reasons are defined by administrators. You cannot add a custom reason.
 - 2.2 Add Comment (OPTIONAL).
 - 2.3 Click **Pend And Next**.

Place On Pend	6
*Pend Reason	
Motion to Quash	
Comments: (Max 1000 Characters)	
MTQ expires December 15 2018.	
	Pend and Nevt

3. The request closes.

4. The **Task Type** of the request = **Fulfillment Pend**. You can locate requests with this **Task Type** using the **Request Search** tool or **My Work Queue**.

Request Search		s Se	arch Res	sults							
Patient Last Name:	_	-S	5elect an opti	ion- 🗸						Displaying	1 - 163 of 163 ite
Patient First Name:	-1	S	Site ID	eRequest ID Group ID	Requester Name	Requester Type	Patient Name	DOB	Received Date 🔺	Days Due 🔺	Task Type
			13270 - D	1769742	DUNNION LAW F	Attorney	AHMAD ALHAJI		07/18/2018		Fulfillment Pen
			13270 - D	1959502	DUNNION LAW F	Attorney	acce-d-cdfd a	10/10/1970	09/19/2018		Fulfillment Per
atient DOB:			13270 - D	2425845	ALLINA - REGINA	Facility	sdfdsfdsf dsfdsf		10/11/2018		Fulfillment Per
mm/dd/yyyy	- 1		13270 - D	2448563	APPALACHIAN R	Facility	dsfdsf dsfdsf		10/12/2018		Fulfillment Per
ite Location:	/		40784 - D	2448529	CONTINUING CA	Continuing Care	cgjlhcjl xdfghjxv	06/23/1989	10/12/2018		Fulfillment Per
			13270 - D	2445297	AFFINITY HEALT	Business Office	ytyt try		10/12/2018		Fulfillment Per
ask Type:			13270 - D	2449160	DUNNION LAW F	Attorney	caaedb-a dfb		10/15/2018	31 Over	Fulfillment Per
Fulfillment Pend	•		13270 - D	2497623	CONTINUING CA	Continuing Care	ee2b-a-4c-b6a-f	10/10/1970	10/31/2018		Fulfillment Per
Request ID:			45410 - C	2499965	ROBERT TESTA	Attorney	yadav kishore		11/01/2018		Fulfillment Per
1			40784 - D	2499948	ROBERT TESTA	Attorney	test test		11/01/2018		Fulfillment Pe
· · · · · · · · · · · · · · · · · · ·		Int.	40784 - D	2499968	ROBERT TESTA	Attorney	. test test		. 11/01/2018		. Fulfillment Per

ly١	Nork	Queue									Display	ing 1 - 1 of 3216 ite
	STAT	Site ID	eRequest ID	Group ID	Requester Type	Patient Name	DOB	MRN	Received Date	Due Date	Task Type	Reason
			2448529 ×		Select 🔻		mm/dd/yyyy		mm/dd/yyyy	mm/dd/yyyy	Select 🔻	Select R 🔻
>		40784 - Denver	2448529		Continuing Care	cgjlhcjl xdfgh	06/23/1989		10/12/2018 02:17 PM		Fulfillment Pend	Motion to Quash

5. When the request is opened again, the **Alarm Clock** is **ORANGE**.

	an di sense a su a serve da		, _, ~, ₀ , , 10 ⁻ ,	 × 2- 2 - 2	Jeff	f Nold	רו י €ו
			 2)	0	•••
h	*Site Location:	40784 - Denver Pain Relief Ce	• Q	/		Task: F	ulfillment Peno
I	eRequest ID: 24	48529			F	Reason: M	otion to Quasł
	Request Inform	ation					~
	Request Type:		and an and all a such	 ·		**************************************	

6. Click the **Alarm Clock** to un-pend the request.



ESCALATE REQUESTS

The new **Escalate** command is available for requests with these **Task Types**:

- Fulfillment
- Fulfillment Pend (new Task Type for v1.3)
- Fulfillment On Hold
- Fulfillment Exception



Purpose

The **Escalate** command is intended to identify "problematic" requests.

We expect that many **Escalated** requests will also be **Pended** (page 23) or flagged as **Exceptions**. These two conditions are normally used to ask for help from other **HealthSource Clarity** users. By contrast, **Escalation** is primarily meant to alert people who do **NOT** spend most of their day in the **HealthSource Clarity** application.



Site-level setting, disabled by default

The **Escalation** command is configured on a site-by-site basis.

It is **DISABLED** by default.

- 1. Log in to **HealthSource Clarity** as a **Group Administrator**.
- 2. From the **Menu**, click **Administration**.
- 3. On the **Administration** screen, click **Site Preferences**.
- 4. In the **Sites** field, enter and select the **Site Number**.
- 5. Enable the **Escalation** option in the **General Settings** section.
- 6. Click **Save**.

an a	مین برای در این با اور این با است میرواند و این این و در با هم میرود هم با این از این میرود. این است از ایر منا این این این این این این این این این این این
Site Preferences	Administration
🐊 Group Administration	Site Preferences
💫 QC Review	*Sites:
🔉 User Permissions	13270 - Demo Site
	General Preferences
	Approval Settings
	Approval For Fulfillment
	Approval For Delivery
	General Settings
	Enable Due Date Management
	Escalation
	Read-only Correspondence



Escalate instructions

1. Click the **Escalate** button at the top of the **Fulfillment** screen.



- 2. The **Add Escalation** popup appears.
 - 2.1 Select the appropriate **Escalation Reason** (page 30). You cannot add a custom reason.
 - 2.2 Add Comment (OPTIONAL).
 - 2.3 Click Escalate And Next.



3. The request closes.



- 4. The **Task Type** of the request does **NOT** change.
- 5. When the request is opened again, the **Escalation** symbol shows how many days have passed since it was escalated.

Number	Example	# of days since Escalation
1	4	2
2	4	4
3		6

- 6. Click the **Escalation** symbol.
- 7. On the **Remove Escalation** popup, add a **Comment (OPTIONAL)**, then click **Remove and Close**.





Escalation Reasons

Reason	Use when
Alternate Media	The Medical Records are stored in a format that cannot be attached to the request.
Certification TAT not met	The request requires Certification but the user responsible for certifying it has not yet done so.
Offsite Charts Not Located	The Medical Records are believed to be stored offsite but have not yet been found. Unlike the <u>Unable to Access</u> reason, <u>Not Located</u> means that you can access the offsite storage location but have not found the requested records.
Offsite Records / Unable to Access	The Medical Records are known to be stored offsite but cannot be attached to the request. Unlike the <u>Not Located</u> reason, <u>Unable to Access</u> means that there is a technical or physical obstacle.
Unable to Locate or Re-Creation	Insufficient data exists to re-create the Medical Records.



Escalation no longer a valid Exception Reason

You can no longer pick <u>Escalation</u> as an **Exception Reason**.

If you need to **Escalate** a request **AND** flag it as an **Exception**, use both commands.





PRICE DETAILS REPORT

Customer Service users can now open a **Price Details** report in **HealthSource Clarity**.

- 1. Run a **Request Search** and open a request.
- 2. On the **Request Details** screen, scroll down to the **Financial Information** section.
- 3. Click the **BLUE I BUTTON** next to **Price Details**.



4. The **Price Details** popup appears. You may need to scroll down using the scroll bar on the far right side of the window to see all the information in this popup.

Table Name	State	e Ma Cla	ijor Iss	H/C	Invoi Type	ce	Reg State	Star	t Date	Base Fee	Hand Fee	lling	Calc Act Post
SMSTATEBASETEST	GA				300		Y	2017 01 00:0	7-12- 0:00.0	25.88			Y
Table Name	ST	Maj Cl	H/C	lnv Typ	c M be Re	ed c	Start	Date	Start Page	Per Pg Base	Per Page Rate	Base Pg Cnt	Add Fee:
SMSTATEPAGETEST	GA			05			2005- 01 00:00	07-	1		0		
nvoice Breakdow	n:												П
ltem		Quar	ntity	Unit	Cost	Тс	otal Cos	st					
Basic Fee		0		\$.00		\$2	25.88						
Retrieval Fee		0		\$.00		\$.	00						
Per Page Copy (Pape	er) 1	18		\$.00		\$.	00						
Shipping		0		\$.00		\$1	1.84						
Subtotal		0		\$.00		\$2	27.72						
Sales Tax		0		\$.00		\$1	1.94						



BETTER DUPLICATE REQUEST DETECTION

HealthSource Clarity now does a better job of finding possible duplicate requests. By finding more possible duplicates "up front," we'll lose less time doing unnecessary logging and fulfillment.

For new requests, **HealthSource Clarity** checks these data values against requests made in the previous 90 days:

- Patient First Name
- Patient Last Name
- Requester



The upcoming v1.3.1 release will make additional improvements to the duplicate request check process.

Check before Submit command

We now check for duplicates after you "pass" the **Patient Last Name** field. You don't need to completely log and submit the request before we alert you to potential duplicates.

Requests excluded from duplicate search

We **DON'T** look for duplicates among older requests that were cancelled or that we responded to by sending **Correspondence**.

In these cases, the "new" request may still be a duplicate, but it's likely that the requester sent us a corrected Request Letter.



Duplicate detection in action

- 1. Start logging a new request.
- 2. As soon as you "pass" the **Patient Last Name** field, the duplicate check occurs.
- 3. If we find a possible duplicate, the screen "splits," with the new Request Letter shown on the left and **Potential Duplicates** on the right. This list can include multiple items.

			Potentia	l Duplicates			
Site ID: 03919	Request ID: 2532107	Patient Name: Test Test	Site ID	Request ID	Patient Name	Requestor Name DOB	Status
TESTINO	DOB:	Status: Logging	03919	2521052	TEST tEST	EDWARD TESTI	Approval for Ful
	Law Offices of A	Letter for			Cl Reque	ick to see est Letter for	
					possi	ole duplicate	

- 4. In the **Potential Duplicates** list, click the blue **REQUEST ID** number to see the Request Letter for the possible duplicate.
- 5. Compare the Request Letters and decide whether to continue logging the new request (**Back to Logging**) or abandon it (**Cancel Request**).

ent Request					Potential Duplic	ates			
ite ID: lequester Name:	03919 EDWARD TESTINO	Request ID: 2532107 DOB:	Patient Name: Status:	Test Test Logging	site iID:	03919 EDWARD TESTINO	Request ID: 2521052 DOB:	Patient Name: Status:	TEST tEST Approval for
▶ ₽ 1 / 2	€ Q (さむ				/1 € Q	৫৩	∢ ∢ Request	1 /1 >>
		Law Offices of ABC	Attorney				Law Offices of A	ABC Attorney	
		Johnson Healthcare ios Main Street Anywhere, AL sissi Re: Patient/Client Name:		Decio	le		Johnson Healthcare 101 Main Street Amywhere, AL 1111 Re: Patient/Client Name: Case No.	,	



CREATE MULTIPLE REQUESTS THROUGH UPLOAD AND EMAIL

You can use the **Ciox HealthSource Separator Page**, introduced in v1.2, to submit a single file containing multiple requests through the:

- Upload Request Letter command
- Email intake option

Previously, the separator was only supported for Central Intake Site faxing.

The sheet has the phrase **Ciox HealthSource Separator Page** printed on it three times, running in both directions vertically. This duplication ensures that **HealthSource Clarity** can read the words no matter how the page is oriented.

- 1. Create a PDF file containing multiple Request Letters.
- 2. Insert one **Ciox HealthSource Separator Page** between each Request Letter. Your manager can provide you with the separator page as a hard copy and an electronic file.
- 3. Submit the PDF:
 - 3.1 Use the **Upload Request Letters** command from the **Menu** in **HealthSource Clarity**.
 - 3.2 Send the PDF to <u>Intake@cioxhealth.com</u>. Use the five digit **Site #** as the **Subject**.
- 4. **HealthSource Clarity** uses the separator to identify the "break" between Request Letters and creates a new eRequest for each one.



USER CONFIGURATION CHANGES

The **User Configuration** page has been updated to reflect two new rules, as described on page 4:

- Any user can only be assigned to a single role;
- Client Service Representative has superseded four older roles.

Jsers Configuration	
Lakshmi Mapakshi	
lakshmi.mapakshi@cioxl	nealth.com
Roles	
) Business Office 💿 Client Service	Representative 🔵 External Management
Sites	
esults 8 found	
Site Id	Site Name
11886	Charleston Pain Management
11886 13270	Charleston Pain Management Demo Site
11886 13270 28864	Charleston Pain Management Demo Site Mercy Hospital Ft Smith
11886 13270 28864 31223	Charleston Pain Management Demo Site Mercy Hospital Ft Smith Roper Mt Pleasant Hospital
11886 13270 28864 31233 ✓	Charleston Pain Management Demo Site Mercy Hospital Ft Smith Roper Mt Pleasant Hospital Denver Bain Polief Conter

	You can choose one, and only one, of these options:
	Business Office
Roles	Client Service Representative
i i i i i i i i i i i i i i i i i i i	External Management
	All other roles are assigned through the Platform Administration tool, not by Group Administrators .
-	This table lists all the Sites in your group.
Sites	Select a checkbox to assign the user to a Site

Group Administrators can access the **User Configuration** page by clicking **Menu** — **Administration** — **Group Administration**.



AUDAPRO — HEALTHSOURCE CLARITY CHANGES

HealthSource Clarity v1.3 makes several important changes to the way it interacts with the **AudaPro** application:

- Delivery Method pushed from AudaPro to HealthSource Clarity
- Disapproval process changes
- Facility Received Date retained after AudaPro updates
- AudaPro requests sent to ROI more efficiently
- Re-submit ROI Update bug fixed
- No matching requester bug fixed

For information on changes made only to **AudaPro**, which do not affect **HealthSource Clarity**, see the latest *AudaPro Release Notes*.



Delivery Method pushed from AudaPro to HealthSource Clarity

The delivery selection in **AudaPro** is now automatically added to the eRequest in **HealthSource Clarity**.

The available delivery methods are not identical in the two applications. This table shows the mapping:

AudaPro Delivery Method	HealthSource Delivery Method
Electronic	Electronic
Direct Connect	Electronic
FedEx	Mail
OnSite Delivery	Walk-In Can be changed during Fulfillment.
USPS	Mail
No method selected	Mail

Disapproval process changes

- If an AudaPro user disapproves the Medical Records attached to an Audit Request, the user must now decide whether to send the request back to HealthSource Clarity to be fixed. Previously, the request was automatically resubmitted.
- When a disapproved request is sent back to be fixed, we now create a new eRequest ID, which is linked to the request's Unique ID in AudaPro. This change lets us push the revised records back to the same Audit Request.
- The **Disapproval Reason** selected in **AudaPro** can be viewed in **HealthSource Clarity** to make it easier to capture the appropriate Medical Records.



Facility Received Date retained after AudaPro updates

When a request is updated in **AudaPro** and resubmitted to **HealthSource Clarity**, the **Facility Received Date** for the eRequest now remains unchanged.

Previously, this date was changed to match the day on which the request was resubmitted, and the date that it was actually received at the facility was "lost" in **HealthSource Clarity**

AudaPro requests sent to ROI more efficiently

AudaPro will not send a request to HealthSource Clarity unless:

- A document has been uploaded to the **Pull List** folder;
- The request has been saved.

Previously, users had to repeat these actions two or more times because **AudaPro** was not properly updating the request. We have fixed this problem so users will not need to do the same work over again.



Re-submit ROI Update bug fixed

Some AudaPro users reported an error when clicking the **Re-Submit ROI Update** button.



ashboaru	<u>My Audits</u>	Administration	Reports	ROI	Add New Request	Create Batch Requests
		s	Error inserting phone System.Data System.Data.Or (String out	g/updating e, address a.OracleClie racleClient	g record: ORA-00936: m 1, address2, city, state, z ent.OracleConnection.Ch .OracleCommand.Prepar	issing expression SQL:Select name, requestor_type, tip from frequent_requestor where sno = at eckError(OciErrorHandle errorHandle, Int32 rc) at e() at HealthPort.Data.BaseDataClass.GetDataSetFor rev isExemptionations.is c() Cochamily and Port

This issue has been resolved.

No matching requester bug fixed

If an **AudaPro** request is not associated with a requester, it will still be sent to **HealthSource Clarity** with a **Task Type** of <u>Fulfillment</u>. This situation occurs when the **HealthSource Clarity** requester database does not have a match for the auditor associated with the request in **AudaPro**.

A **Client Service Representative** can then assign a requester and capture the Medical Records.

After the requester is added in **HealthSource Clarity**, the matching process will be automatic and manual action will be needed.