CiOX
HEALTH

HealthSource Clarity

v1.3 Release Notes

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Document History

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HealthSource Clarity v1.3 Release Notes

> 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.
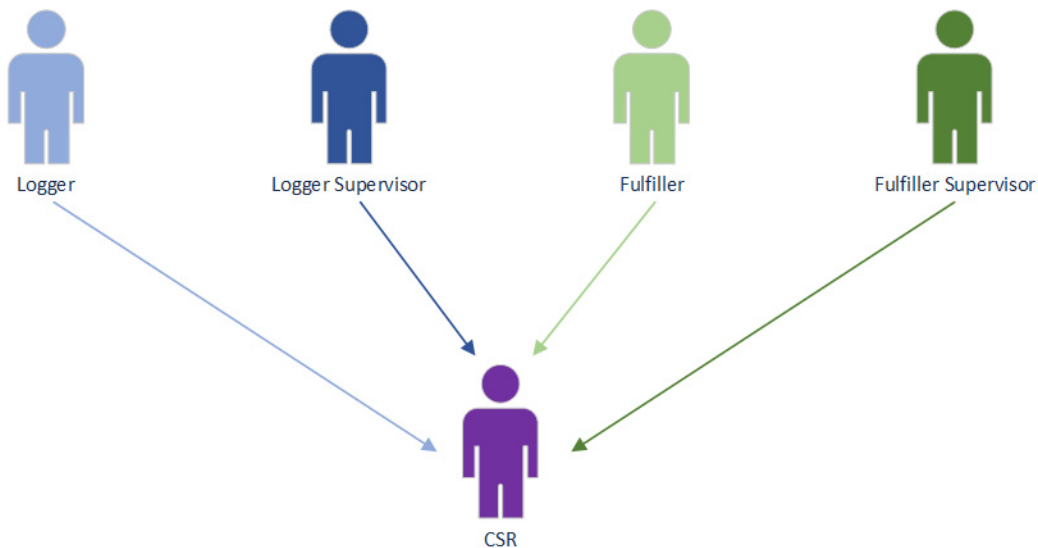
One role per user

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		☒
• Fulfillment	✔	
• Fulfillment On Hold	✔	
• Fulfillment Exception	✔	
• Fulfillment QC		☒
Approve for Fulfillment / Delivery	✔	
Certify request	✔	
Send request to New Requester team	✔	
Split request	✔	
Run reports	✔	
Run Request Search	✔	
View Request Subway		☒
View My Dashboard	✔	
View My Work Queue	✔	
Add new request	✔	
Enter STAT requests	✔	
Upload Request Letters	✔	
Upload Indirect Chase files		☒
Add new requester		☒
Administration menu		☒
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	Request Search	N/A The **Request Search** page is blank for these users, since we can't anticipate what kind of requests they need to find.
Business Office		
Ciox Executive		
Customer Service		
External Management		
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.
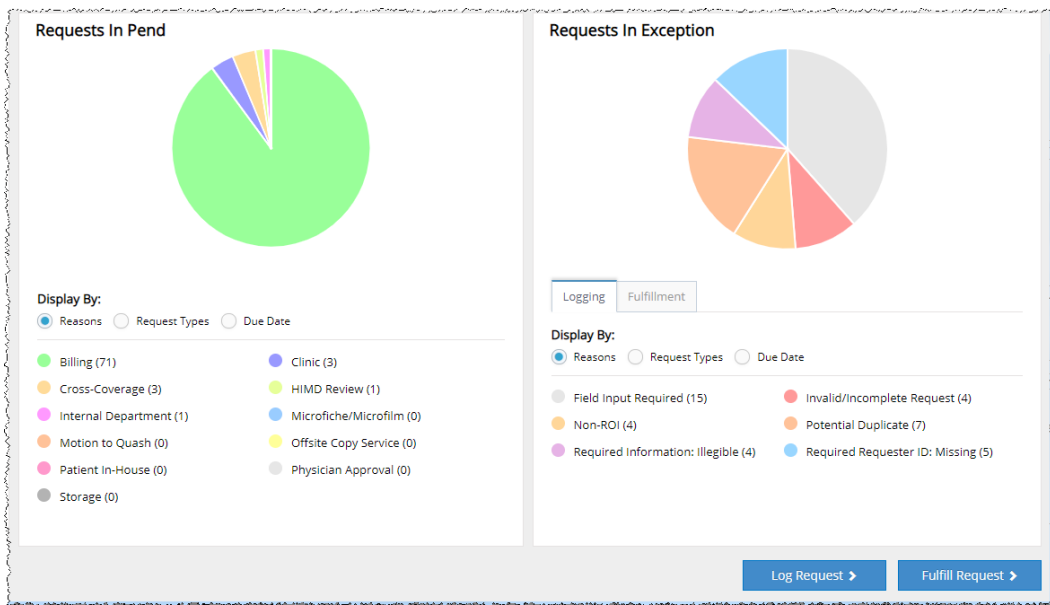
Log Request and Fulfill Request buttons

Fetches requests with a Task Type of	
Log Request	**Fulfill Request**
Logging	Fulfillment
	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 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.

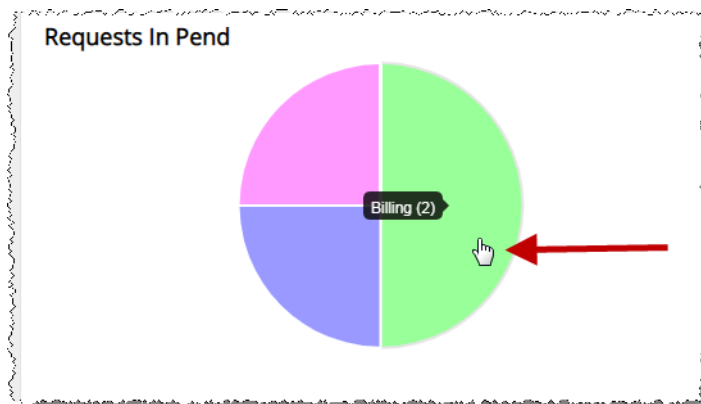**Time period**

The charts show requests over the last 30 days.
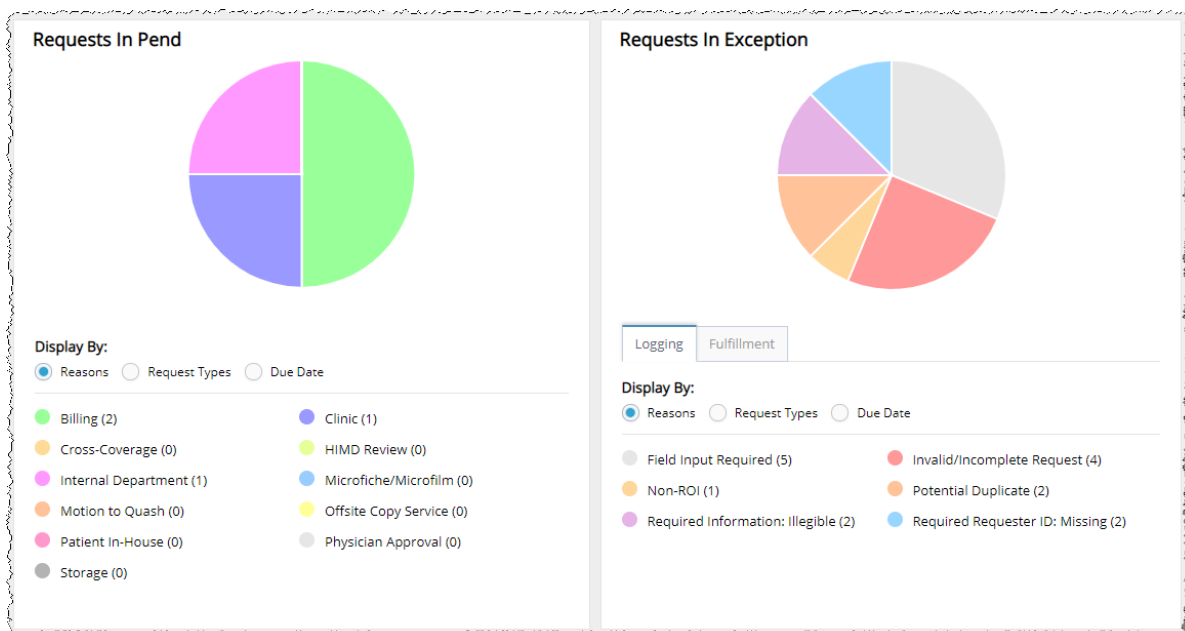
Display By options

- **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.
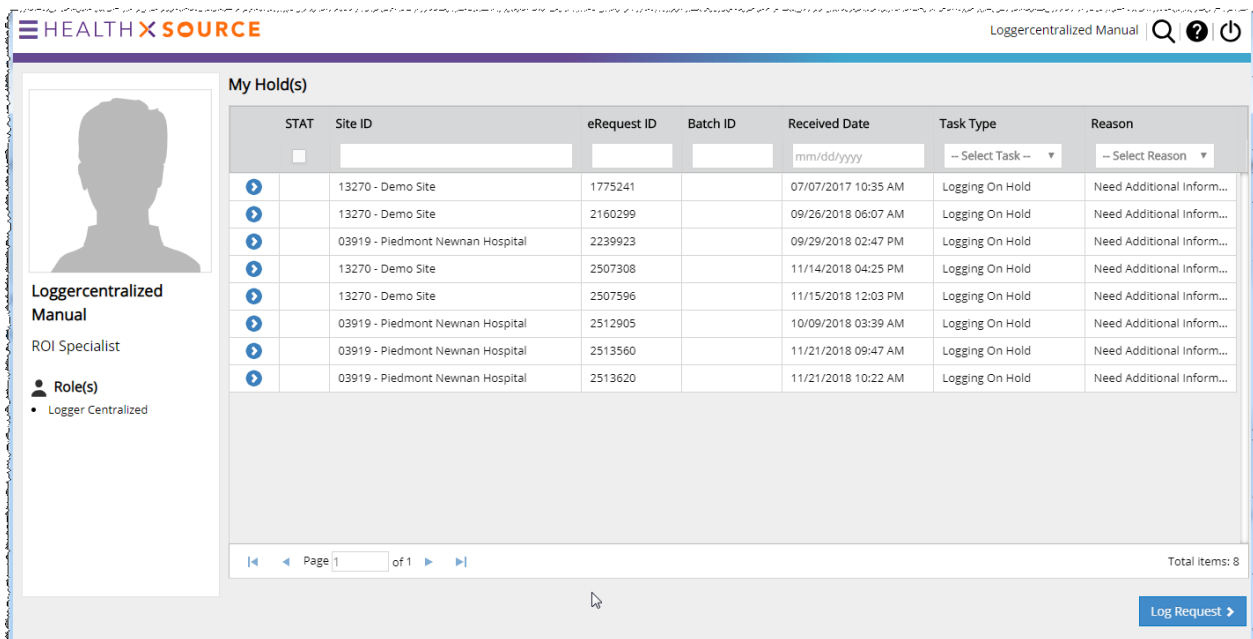

3. Review the request details.

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**.
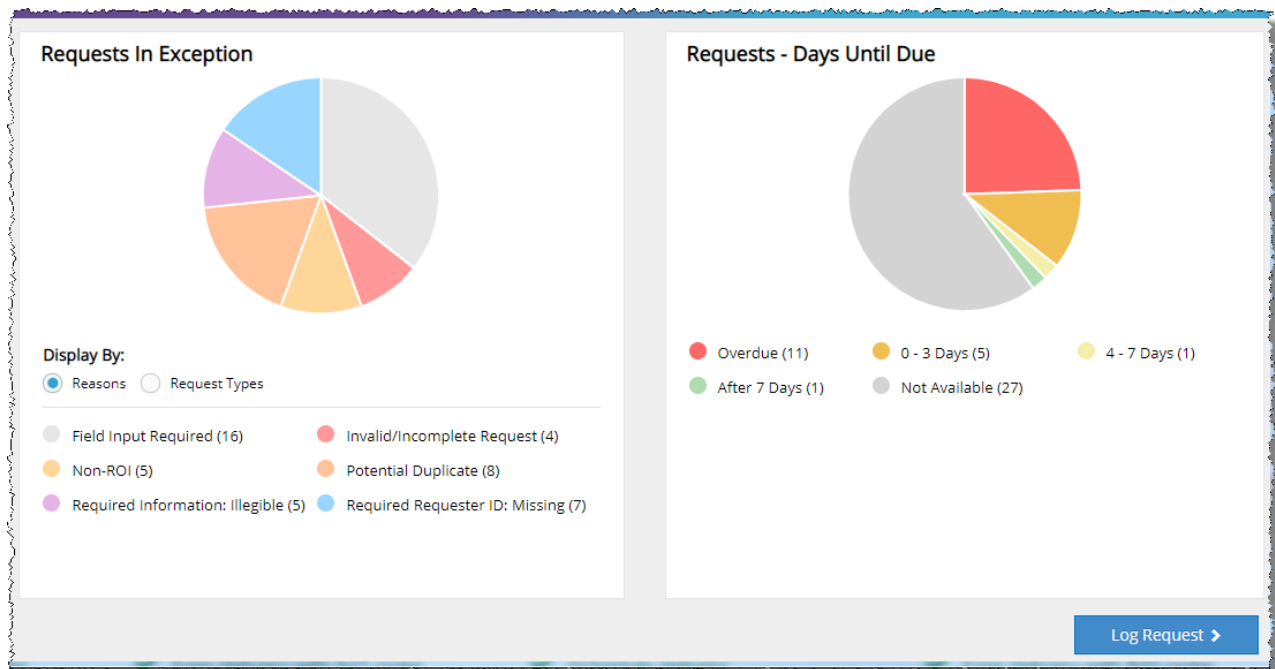

Log Request button

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 Logging.

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;

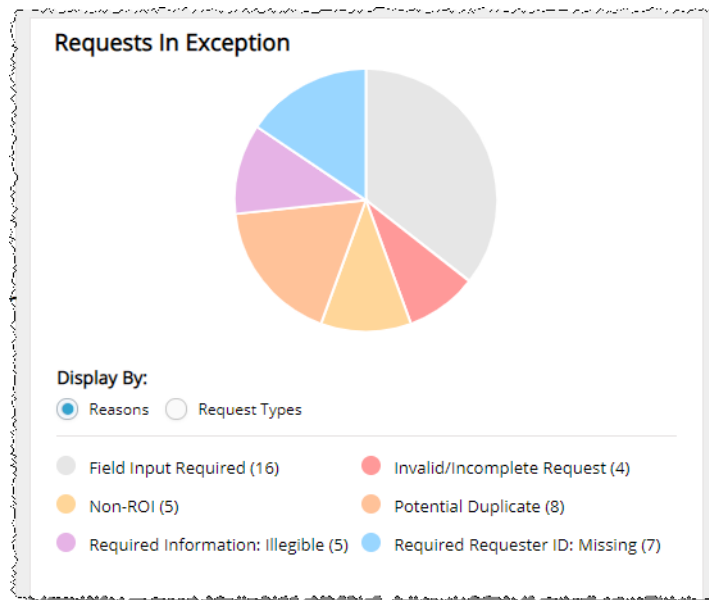- Breaks down the current inventory of requests by **Due Date**.

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 Logging.

Requests in Exception chart

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

Time period

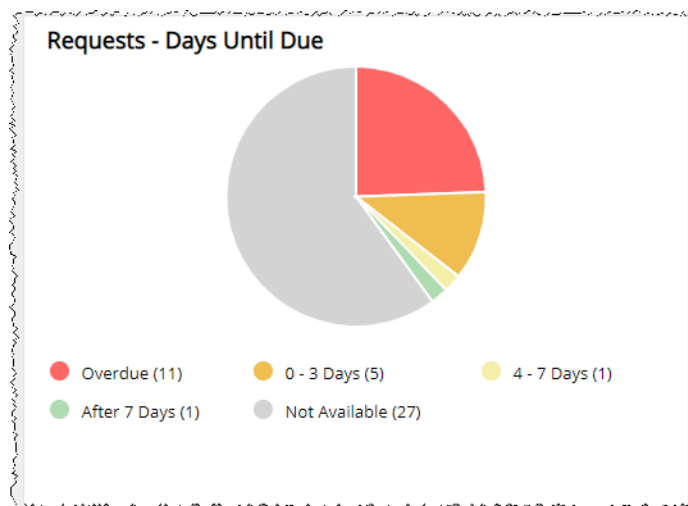The chart shows requests over the last 30 days.

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
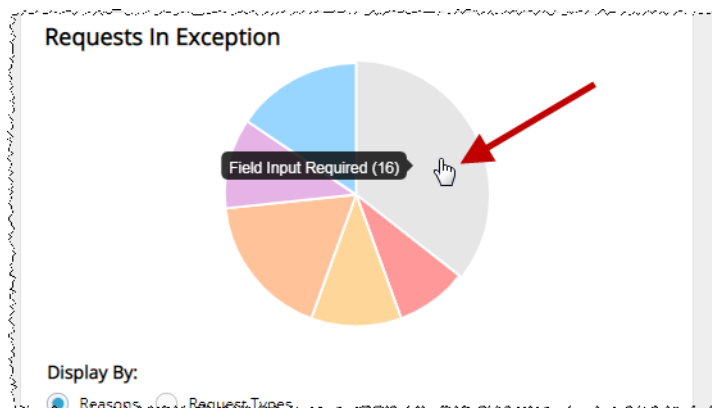
- Due in more than 7 days

- Not Available (no Due Date)

Time period

The chart shows requests over the last 30 days.
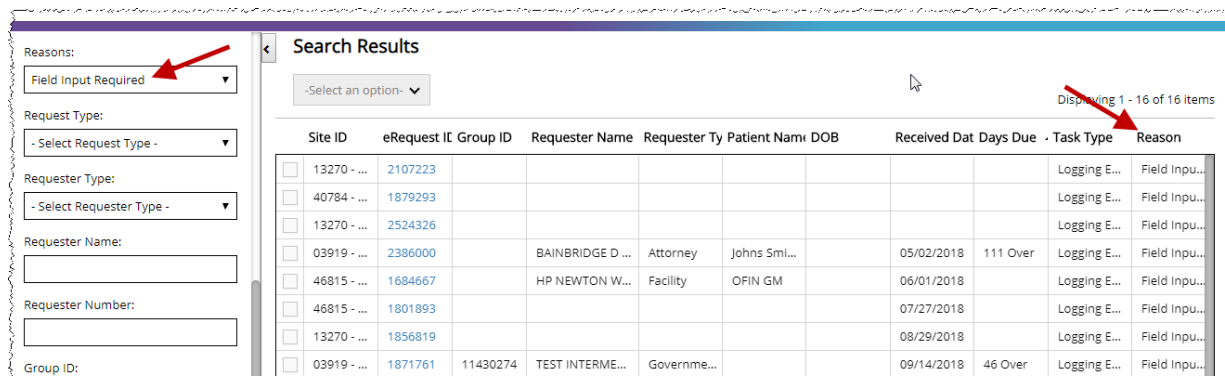
View request details

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.

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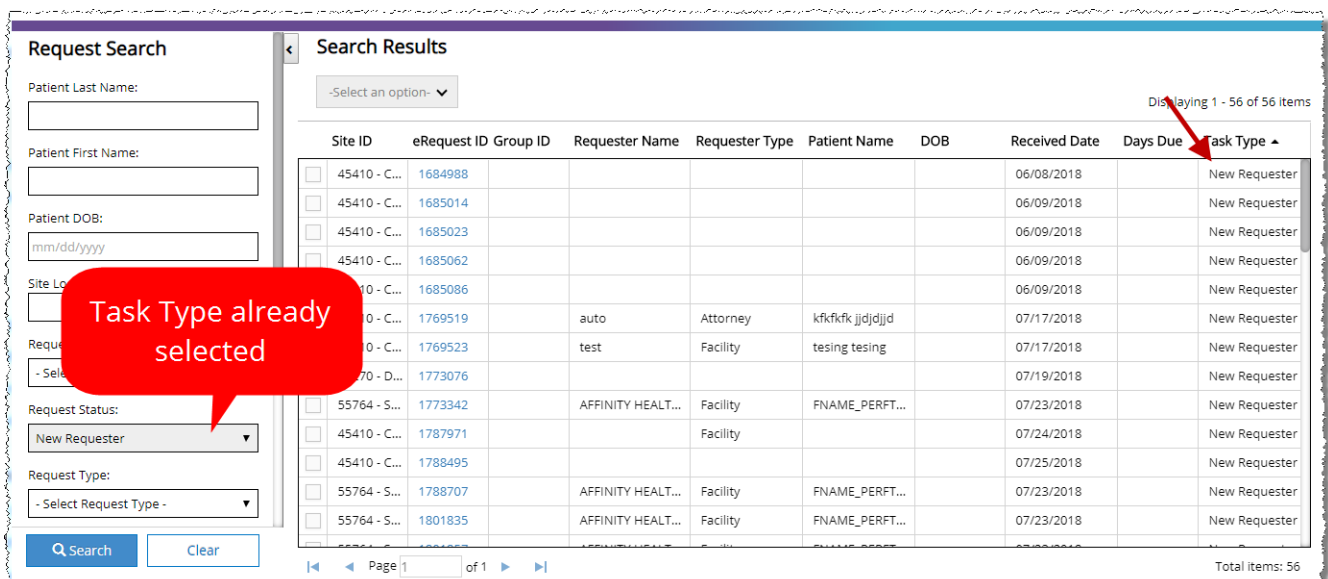
Users assigned to the **New Requester** role automatically land on the **Request Search** page after logging in.

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

- New Requester

- Fulfillment New Requester

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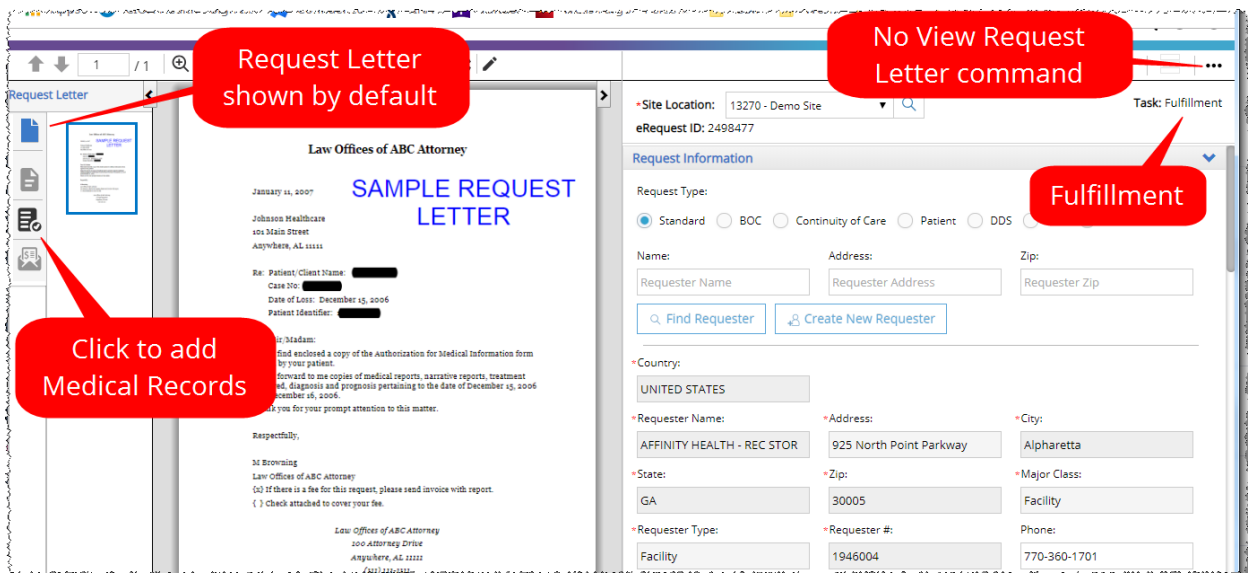
This change was made in response to feedback from field users, who told us that opening the Request Letter through the ... (**More Actions)** command took too much time.

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.

> This process should **ONLY** be used for high-priority in-person requests.
>
> For other requests, use the normal **Submit and Next** procedure to finish **Logging**.

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**.
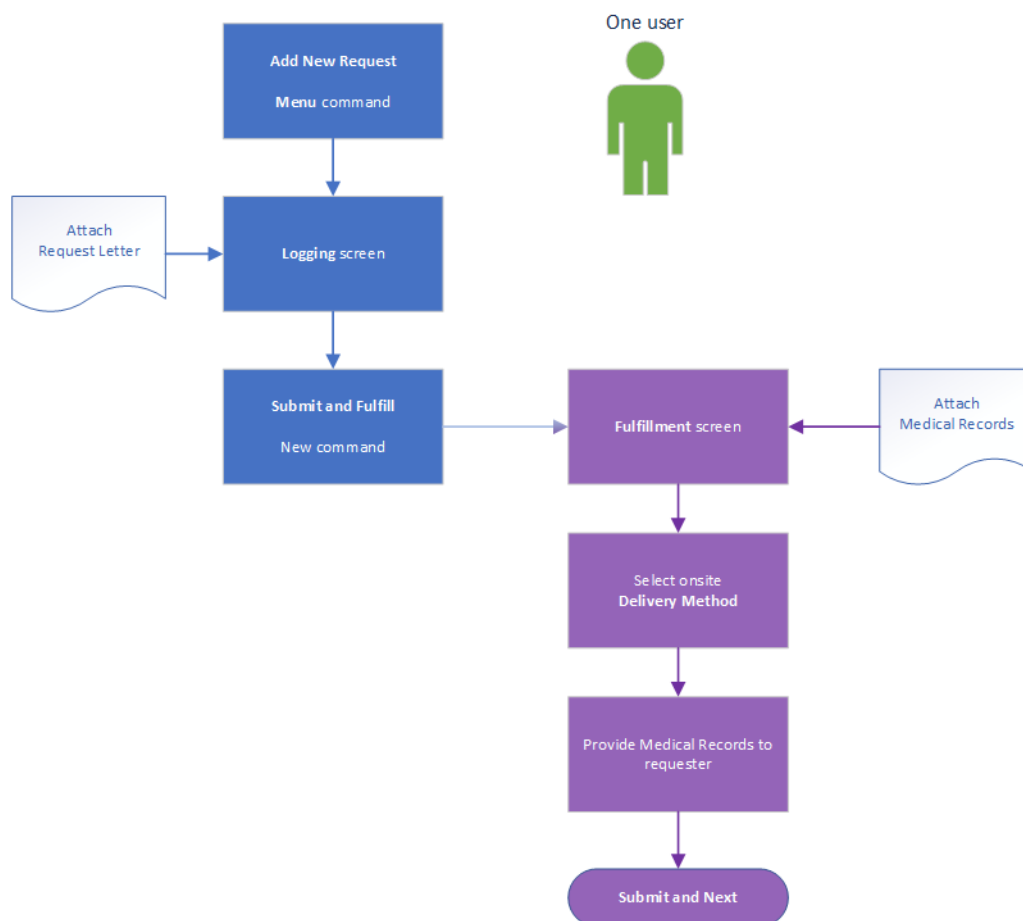
Express ROI instructions

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.
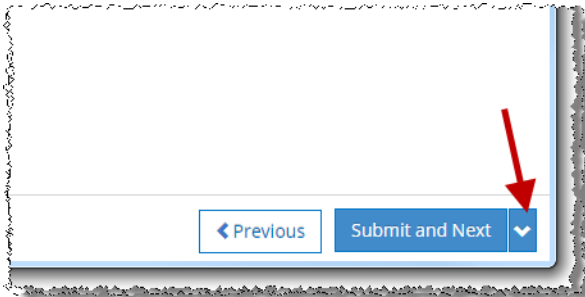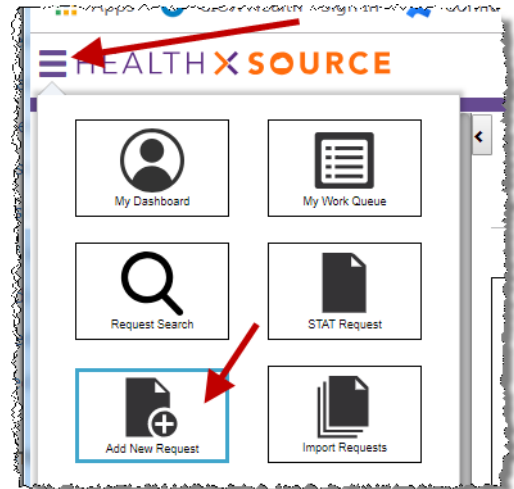
5. Click **Submit and Fulfill**.
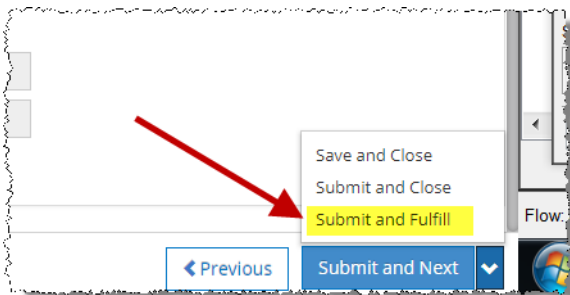
6. The **Fulfillment** screen opens, with the Request Letter automatically displayed (page 18).

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

8. Attach the Medical Records.
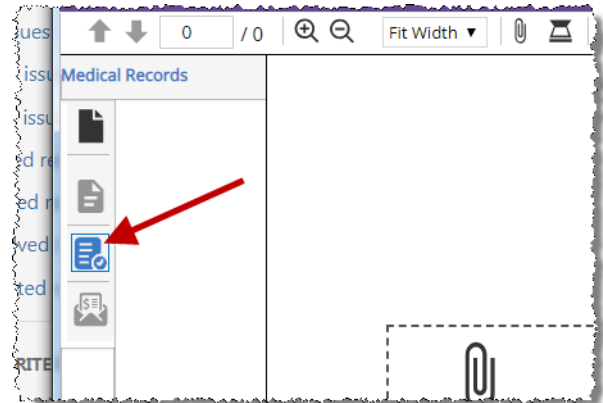
9. Select the appropriate onsite **Delivery Method**:

    9.1 CD

    9.2 DVD

    9.3 Faxed

    9.4 Flash Drive

    9.5 Walk-In
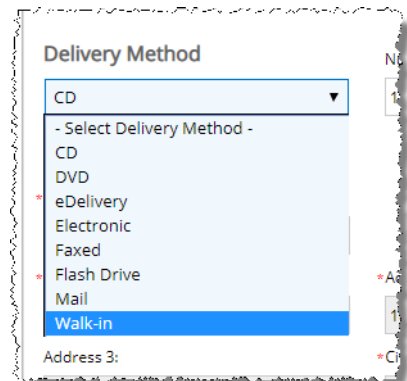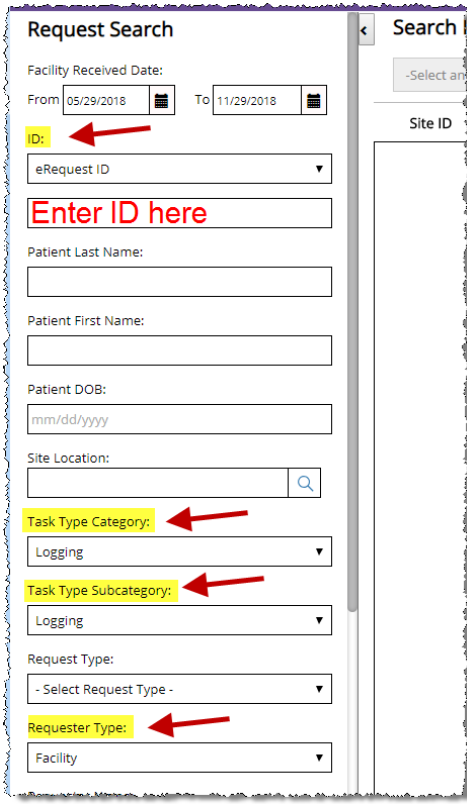
10. Fill out any other required data entry fields, then click **Submit and Next**.

REQUEST SEARCH CHANGES

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

	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.
	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.
	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	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
Pend	• 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. • 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.
Exception	You can't decide how to process this request. 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.
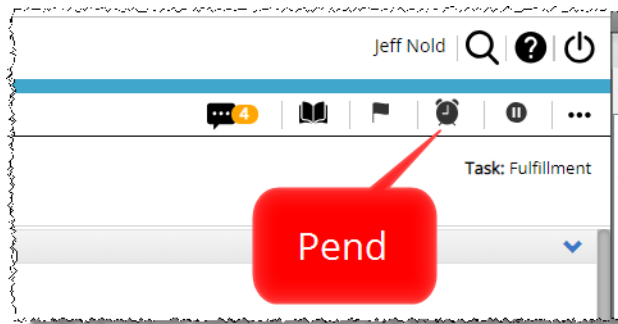
2. The **Place On Pend** popup appears.

    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**.
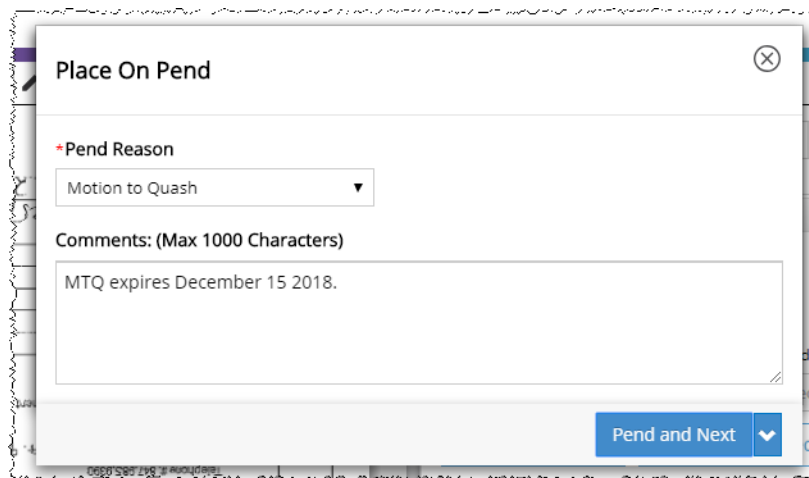
3. The request closes.

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**.
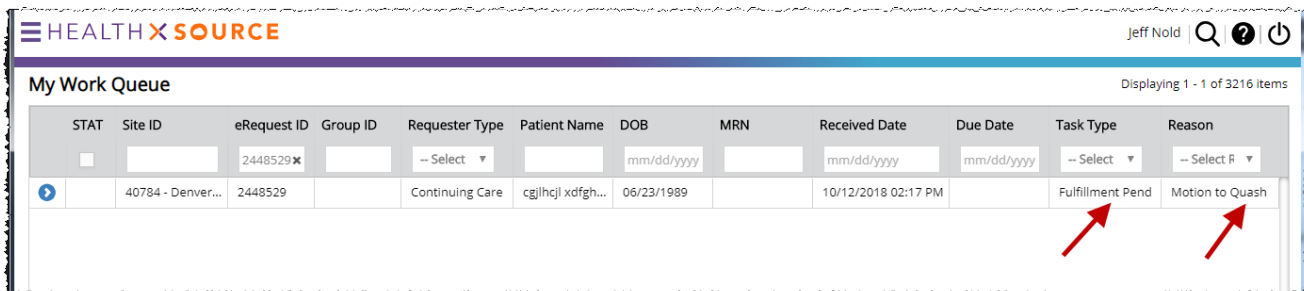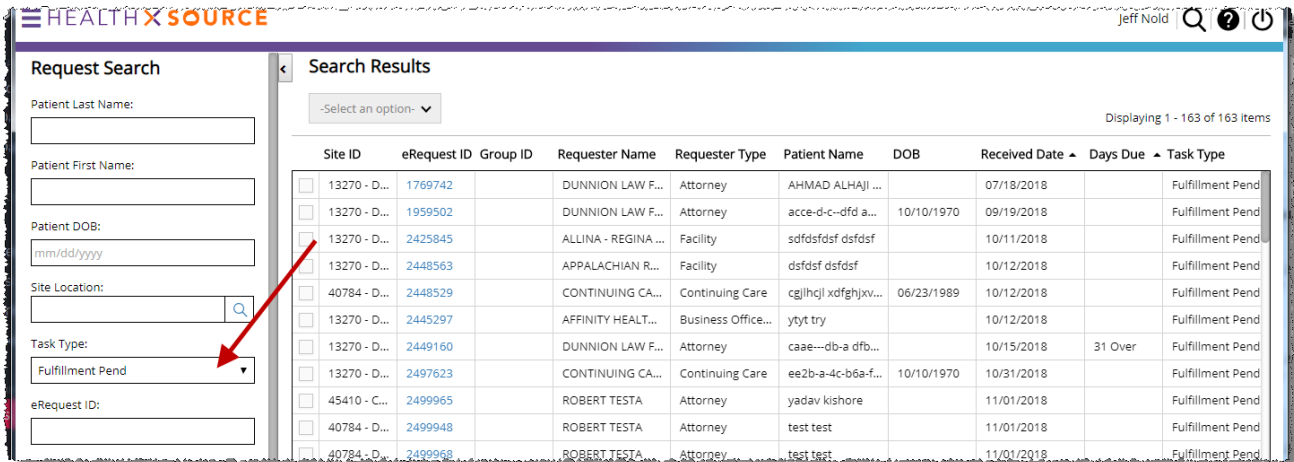
5. When the request is opened again, the **Alarm Clock** is **ORANGE**.
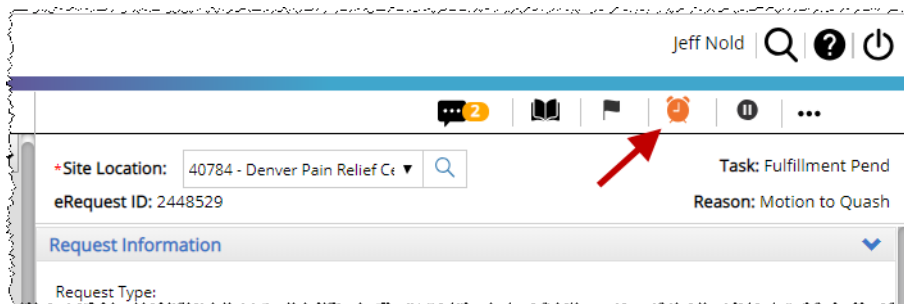
6. Click the **Alarm Clock** to un-pend the request.

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
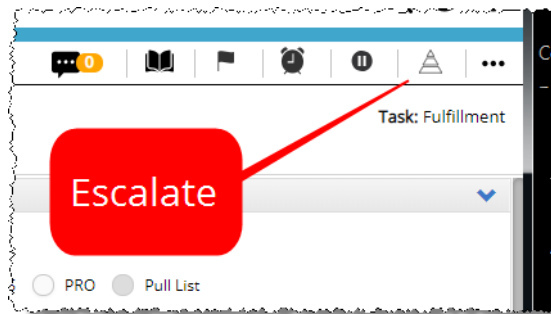
Purpose

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

We expect that many **Escalated** requests will also be **Pended** () 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**.
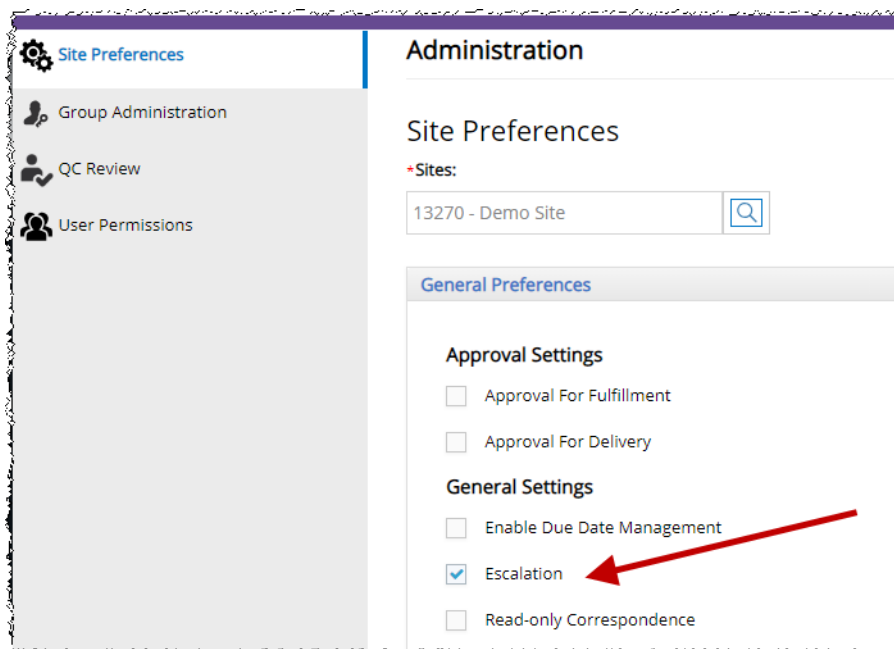
Escalate instructions

1. Click the **Escalate** button at the top of the **Fulfillment** screen.
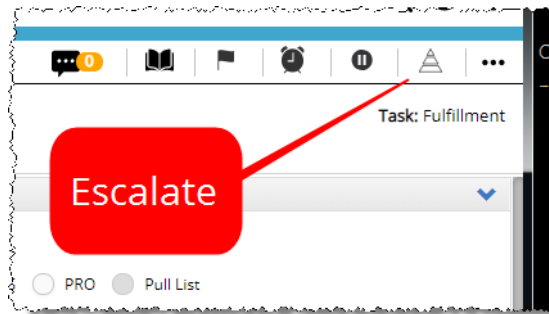
2. The **Add Escalation** popup appears.

   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**.
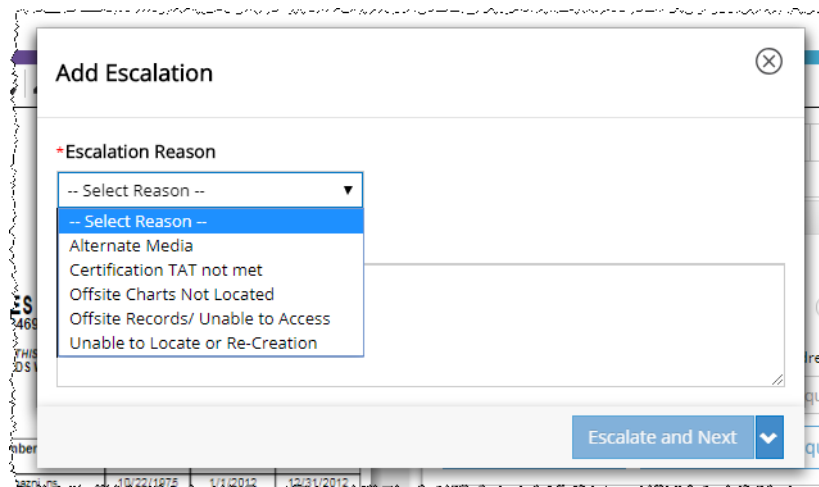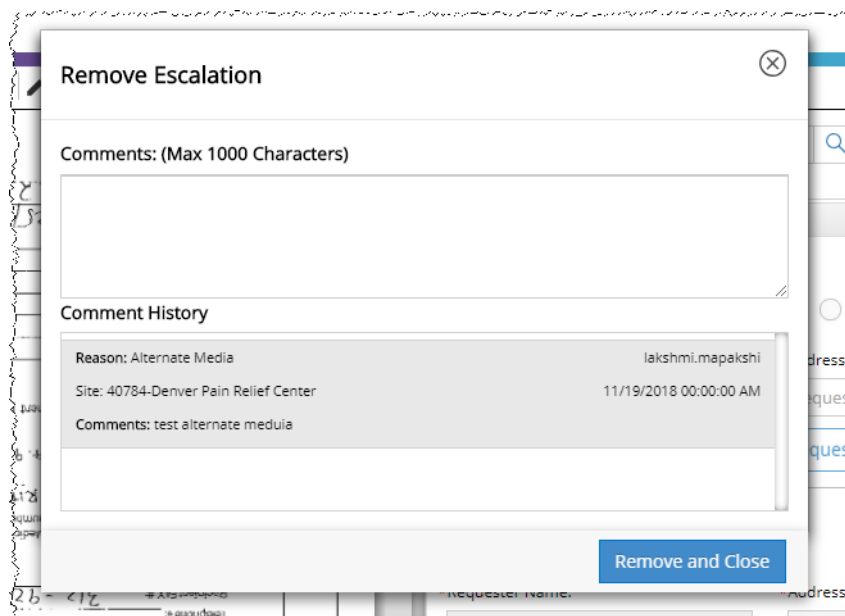
3. The request closes.

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		2
2		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 Unable to Access reason, Not Located 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 Not Located reason, Unable to Access 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 Escalation as an **Exception Reason**.

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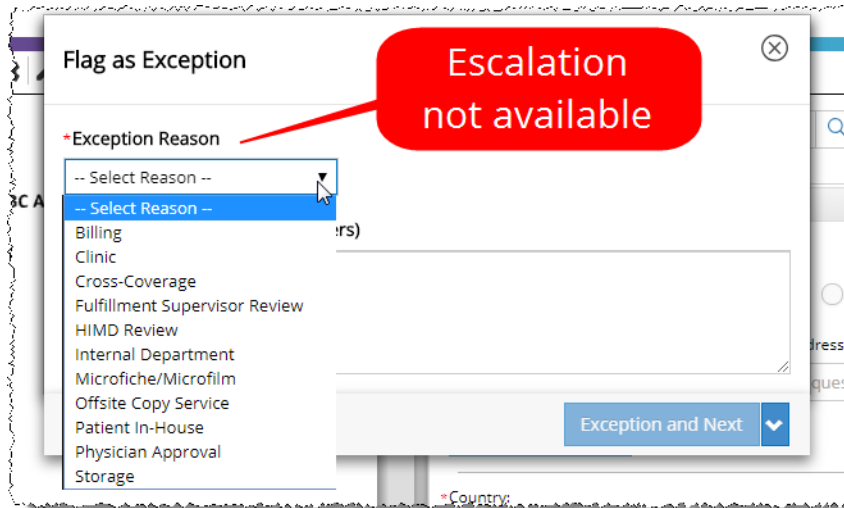
PRICE DETAILS REPORT

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**.

Request Details

eRequest ID: 2845676   Task Type: Delivery

+ Area/Site Information

+ Request Information

+ Requester Information

+ Billing/Shipping Address Inform

+ Patient Information

Financial Information section

− Financial Information

Payment Information

Check Received: No
Check Number:
Check Date:

Price Details

Invoice Pricing Information   Price Details ⓘ

Item	Quantity	Unit Cost	Total Cost
Basic Fee	0	$.00	$25.88
Retrieval Fee	0	$.00	$.00
Per Page Copy (Paper) 1	18	$.00	$.00

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.

Price Details   ⊗

Table Name	State	Major Class	H/C	Invoice Type	Reg State	Start Date	Base Fee	Handling Fee	Calc Act Post
SMSTATEBASETEST	GA			300	Y	2017-12-01 00:00:00.0	25.88		Y

Table Name	ST	Maj Cl	H/C	Invc Type	Med Rec	Start Date	Start Page	Per Pg Base	Per Page Rate	Base Pg Cnt	Add Fees
SMSTATEPAGETEST	GA			05		2005-07-01 00:00:00.0	1		0		

Invoice Breakdown:

Item	Quantity	Unit Cost	Total Cost
Basic Fee	0	$.00	$25.88
Retrieval Fee	0	$.00	$.00
Per Page Copy (Paper) 1	18	$.00	$.00
Shipping	0	$.00	$1.84
Subtotal	0	$.00	$27.72
Sales Tax	0	$.00	$1.94
Invoice Total	0	$.00	$29.66

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.
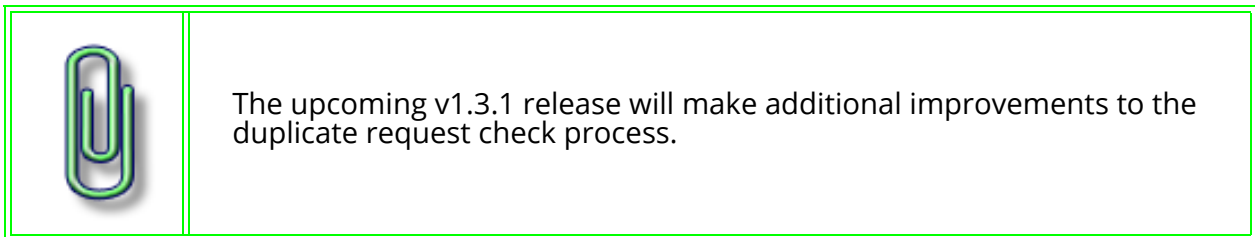
Check before Submit command

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.
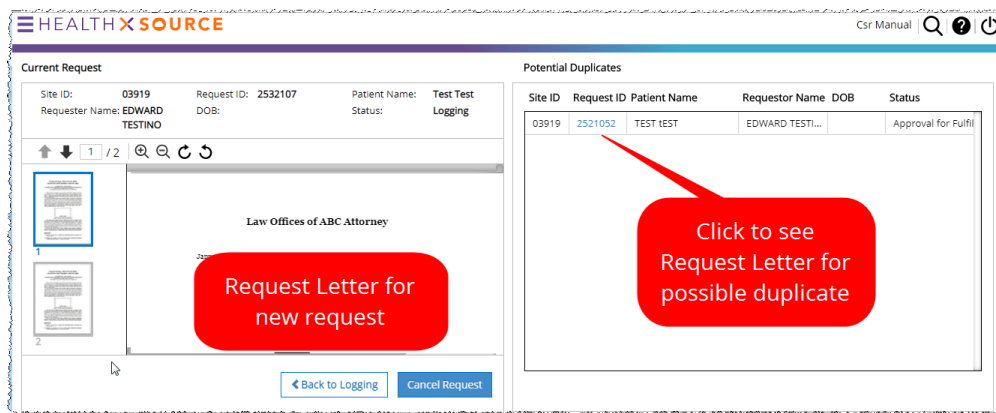
4. In the **Potential Duplicates** list, click the blue **REQUEST ID** number to see the Request Letter for the possible duplicate.

5. Compare the Request Letters and decide whether to continue logging the new request (**Back to Logging**) or abandon it (**Cancel Request**).
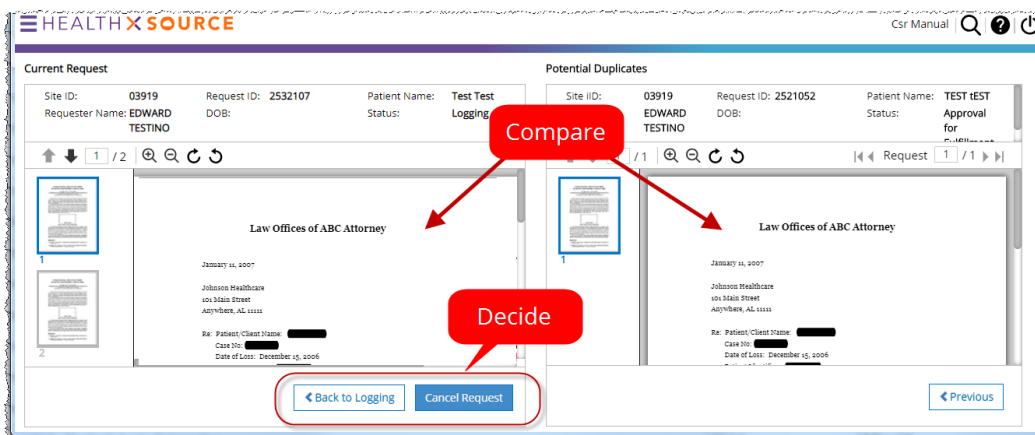
CREATE MULTIPLE REQUESTS THROUGH UPLOAD AND EMAIL

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

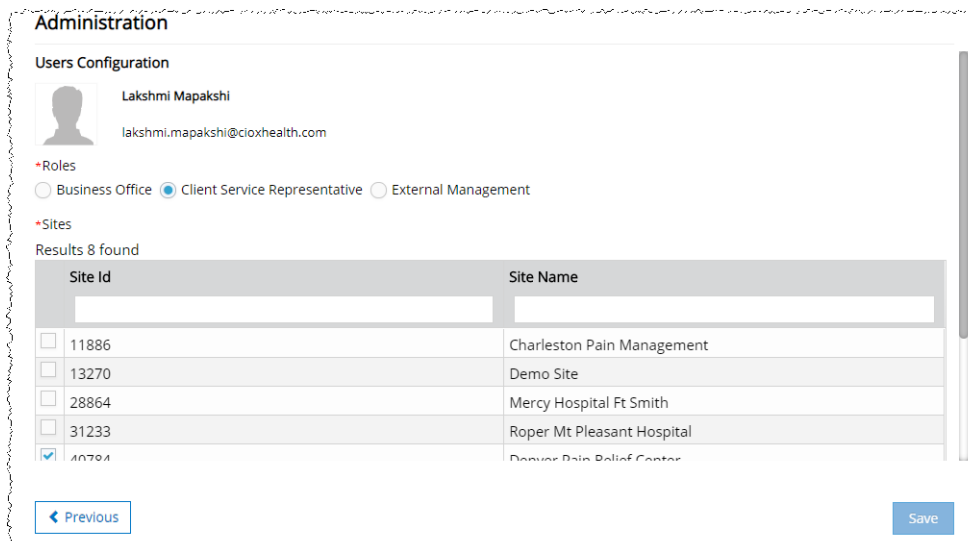Previously, the separator was only supported for Central Intake Site faxing.

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 Intake@cioxhealth.com. 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.

Roles	You can choose one, and only one, of these options: • Business Office • Client Service Representative • External Management All other roles are assigned through the **Platform Administration** tool, not by **Group Administrators**.
Sites	This table lists all the Sites in your group. 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.
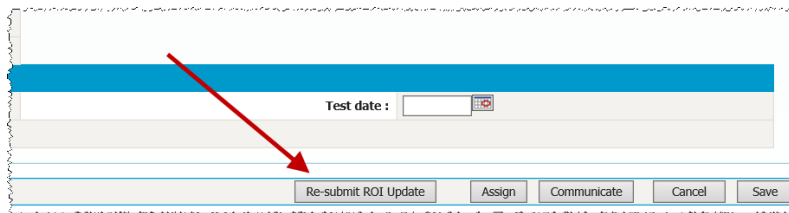
This issue has been resolved.

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.