

HealthSource Clarity v1.4.1



ciOX
HEALTH **SOURCE**

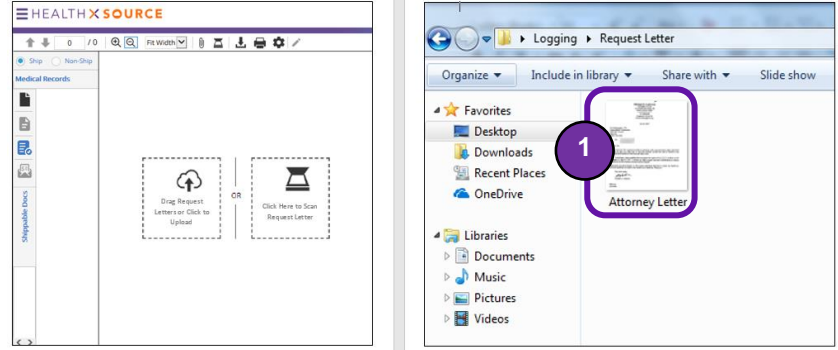
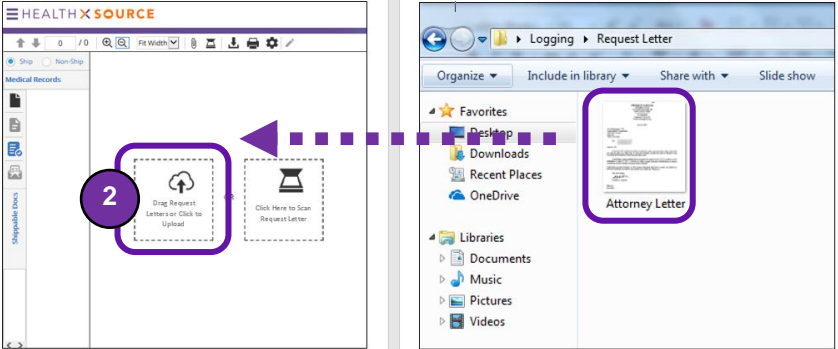
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Drag Documents into a Request

Add documents to a Request by using a drag and drop feature.

Step	Action
1	<p>Select document from your computer.</p>  <p>The screenshot shows the HealthSource interface with two options: 'Drag Request Letters or Click to Upload' and 'Click Here to Scan Request Letter'. A separate window shows a file explorer with 'Attorney Letter' selected, indicated by a purple circle with the number 1.</p>
2	<p>Using your mouse, drag and drop the file into Documents window for a Request.</p> <p>Logging: Request Letter can be added.</p> <p>Fulfillment: Medical Records can be added.</p> <p>Note: You cannot drag files to create Correspondence Letters or Invoices.</p>  <p>The screenshot shows the 'Attorney Letter' file being dragged from the file explorer into the 'Medical Records' window. A purple circle with the number 2 highlights the 'Medical Records' window, and a dashed arrow indicates the drag action.</p>



Requester Search

The Requester Search fields are displayed as Zip, Address, and Name. The new layout utilizes the requester location improving the chances of finding and selecting the correct match.

Step	Action	
1	Enter: <ul style="list-style-type: none"> Zip with Address or Name 	
2	Select Find Requester .	

Select Requester Pop-Up Window


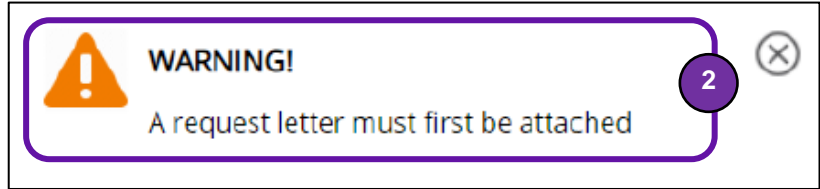
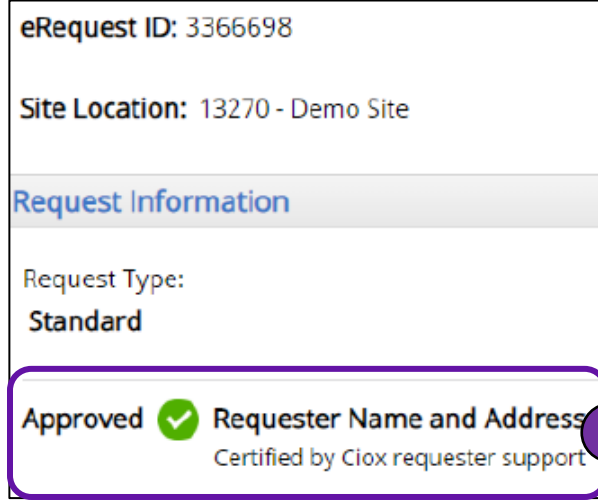

The Select Requester pop-up window appears even with one match. The requester identification field are no longer automatically completed.

Step	Action																															
1	Select Requester . <p>Note: The Select Requester pop-up window sorts by Delivery Type, with Electronic appearing first.</p>	<table border="1"> <thead> <tr> <th>Requester #</th> <th>Requester Name</th> <th>Address</th> <th>Major Class</th> <th>Delivery Type</th> </tr> </thead> <tbody> <tr> <td>1416877</td> <td>EMSI</td> <td>PO BOX 2526, WACO, TX, USA- 76702</td> <td>Indirect Payor</td> <td>Electronic</td> </tr> <tr> <td>218452</td> <td>EMSI</td> <td>PO BOX 2505, WACO, TX, USA- 76702</td> <td>Copy Service</td> <td>Electronic</td> </tr> <tr> <td>1346394</td> <td>EMSI</td> <td>PO BOX 2528, WACO, TX, USA- 76702-2528</td> <td>Copy Service</td> <td>Electronic</td> </tr> <tr> <td>1629854</td> <td>AMERICAN AMICABLE LIFE INS</td> <td>PO BOX 2549, WACO, TX, USA- 76702-2549</td> <td>Insurance Company</td> <td>Mail</td> </tr> <tr> <td>2182819</td> <td>AMERICAN GENERAL LIFE</td> <td>PO BOX 2505, WACO, TX, UNITED STATES- 76702-2505</td> <td>Insurance Company</td> <td>Mail</td> </tr> </tbody> </table>	Requester #	Requester Name	Address	Major Class	Delivery Type	1416877	EMSI	PO BOX 2526, WACO, TX, USA- 76702	Indirect Payor	Electronic	218452	EMSI	PO BOX 2505, WACO, TX, USA- 76702	Copy Service	Electronic	1346394	EMSI	PO BOX 2528, WACO, TX, USA- 76702-2528	Copy Service	Electronic	1629854	AMERICAN AMICABLE LIFE INS	PO BOX 2549, WACO, TX, USA- 76702-2549	Insurance Company	Mail	2182819	AMERICAN GENERAL LIFE	PO BOX 2505, WACO, TX, UNITED STATES- 76702-2505	Insurance Company	Mail
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Submit to Requester Support

The **Create New Requester** button has been replaced with **Submit to Requester Support** button.

Step	Action
1	<p>If Requester is not found, select the Submit to Requester Support button.</p> 
2	<p>A warning appears if a request letter is not attached.</p> 
3	<p>After the Requester Support team completes their process, the request returns to previous status.</p> <p>The screen shows an Approved flag.</p> 
4	<p>A prompt appears to verify the Ship To address.</p> 







Date Field Changes

Step	Action																								
<p>1</p> <p>In the Request Information section, Fax Date field has been replaced with Intake Date field.</p>	<p>*Country: UNITED STATES</p> <p>*Requester Name: [] *Address: [] *City: []</p> <p>*State: [] *Zip: [] *Major Class: []</p> <p>*Requester Type: [] *Requester #: [] Phone: []</p> <p>Fax: [] *Request Letter Date: 03/29/2019 *Facility Received Date: 03/29/2019</p> <p>Intake Date: 03/29/2019 (1) Send Notification to Requester: [] Request Notification Comments: []</p>																								
<p>2</p> <p>In the Request Information section, Facility Received Date field is no longer completed automatically.</p> <p>This date must be entered during Logging but can be change during Fulfillment.</p>	<p>*Country: UNITED STATES</p> <p>*Requester Name: [] *Address: [] *City: []</p> <p>*State: [] *Zip: [] *Major Class: []</p> <p>*Requester Type: [] *Requester #: [] Phone: []</p> <p>Fax: [] *Request Letter Date: 03/29/2019 (2) *Facility Received Date: 03/29/2019</p> <p>Intake Date: 03/29/2019 Send Notification to Requester: [] Request Notification Comments: []</p>																								
<p>3</p> <p>In My Work Queue section, Intake Date has been added. Received Date has been replaced with Facility Rcvd Date.</p>	<p>My Work Queue</p> <table border="1"> <thead> <tr> <th>STAT</th> <th>Site ID</th> <th>eRequest ID</th> <th>Group ID</th> <th>Requester Type</th> <th>Patient Name</th> <th>DOB</th> <th>MF</th> <th>(3)</th> <th>Intake Date</th> <th>Facility Rcvd Date</th> <th>Due Date</th> </tr> </thead> <tbody> <tr> <td>[]</td> <td>[]</td> <td>[]</td> <td>[]</td> <td>-- Select --</td> <td>[]</td> <td>mm/dd/yyyy</td> <td>[]</td> <td>[]</td> <td>mm/dd/yyyy</td> <td>mm/dd/yyyy</td> <td>mm/dd/yyyy</td> </tr> </tbody> </table>	STAT	Site ID	eRequest ID	Group ID	Requester Type	Patient Name	DOB	MF	(3)	Intake Date	Facility Rcvd Date	Due Date	[]	[]	[]	[]	-- Select --	[]	mm/dd/yyyy	[]	[]	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy
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<p>4</p> <p>In the Search Results section, Received Date has been replaced with Facility Rcvd Date.</p>	<p>Search Results</p> <p>Displaying 1 - 1 of 1 items</p> <table border="1"> <thead> <tr> <th>STAT</th> <th>Site ID</th> <th>eRequest ID</th> <th>Group ID</th> <th>Requester Name</th> <th>Requester Type</th> <th>Patient Name</th> <th>DOB</th> <th>MF</th> <th>(4)</th> <th>Days Du</th> <th>Task Type</th> </tr> </thead> <tbody> <tr> <td>[]</td> <td>13270 - D...</td> <td>10001366</td> <td>[]</td> <td>LITSTER FROS...</td> <td>Attorney</td> <td>Jane Doe</td> <td>[]</td> <td>[]</td> <td>03/28/2019 12:...</td> <td>[]</td> <td>Logging</td> </tr> </tbody> </table>	STAT	Site ID	eRequest ID	Group ID	Requester Name	Requester Type	Patient Name	DOB	MF	(4)	Days Du	Task Type	[]	13270 - D...	10001366	[]	LITSTER FROS...	Attorney	Jane Doe	[]	[]	03/28/2019 12:...	[]	Logging
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Enhanced Duplicate Request Detection

Duplicate requests are approximately 10% of Ciox Health's total volume. Client Service Representatives do not receive credit for duplicates and Ciox cannot bill for them.

Step	Action	
1	<p>The Request screen now includes a Potential Duplicate Request indicator to the left of the Comments button.</p>	
2	<p>When does the indicator appear?</p>	<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">  <p>2a</p> </div> <div style="text-align: center;">  <p>2b</p> </div> <div style="text-align: center;">  <p>2c</p> </div> </div> <ul style="list-style-type: none"> a) Typically appears during Logging, before entering Patient Information. b) After entering Patient Information in Logging and no duplicates were found. c) The number = how many possible duplicates were found. Click the numbered indicator to open the Potential Duplicates grid.



More Information in the Potential Duplicate Grid

Three columns have been added to the Potential Duplicates grid. These additions help identify requests for the **same** patient but for **different** encounters. These requests might appear to be duplicates based on the Patient Name or SSN but are separate and valid requests.

Step	Action
1	<p>The following fields have been added:</p> <ul style="list-style-type: none">a) MRNb) Service Start Datec) Service End Date

eRequest ID	Patient Name	DOB	SSN	MRN	Status	Facility Received Date	Service Start Date	Service End Date
3362349	Williams1 Derk1	08/11/1948			Fulfillme...	01/28/2019	01/01/2017	12/31/2017
3364415	Williams1 Derk1	08/11/1948			Fulfillment	01/25/2019	01/01/2017	12/31/2017
3364789	Williams1 Derk1	08/11/1948			Fulfillment	01/25/2019	01/01/2017	12/31/2017

Diagram annotations: A purple box labeled '1a' highlights the MRN column. A purple box labeled '1b' highlights the Service Start Date column. A purple box labeled '1c' highlights the Service End Date column.



Updated Reasons for Request

We **added** new Primary Reason for Request choices and **deleted** several others that are not appropriate for certain Requester Types. Some of the changes apply only to sites in specific states.

New Reasons for Request

Major Class	Requester Type	New Primary Reason for Request	State limit?
Attorney	Attorney	Represent Indigent	Available for all sites
		SSA Appeal Representative Form 1696	Only available in Washington state
		Patient Social Security Appeal	Only available in: <ul style="list-style-type: none"> • Tennessee • West Virginia
Copy Service	Attorney	Represent Indigent	Available for all sites
		SSA Appeal Representative Form 1696	Only available in Washington state
		Patient Social Security Appeal	Only available in: <ul style="list-style-type: none"> • Tennessee • West Virginia
Copy Service	Insurance	Hospital Lien	Available for all sites
Insurance	Insurance	APS	Available for all sites
		Hospital Lien	
PAYI	Indirect Payor	Insurance Claim	Available for all sites
PAYD	Direct Payor	Ciox Audit	Available for all sites



Deleted Reasons for Request

Major Class	Requester Type	Reason for Request		State limit?
		Primary	Secondary	
Attorney	Attorney	Coding Summary	N/A	Deleted for all sites
		Patient Social Security for Washington Appeal	N/A	
		Personal Injury	Non Profit	
		Scan for Coding	N/A	
ConCare	ConCare	Hospice	N/A	Deleted for all sites
Copy Service	Attorney	Coding Summary	N/A	Deleted for all sites
		Patient Social Security for Washington Appeal	N/A	
		Personal Injury	Non Profit	
		Scan for Coding	N/A	
		State Attorney Office	N/A	
Copy Service	Insurance	Audits	Non-Billable Audits	Deleted for all sites
		Non-Bill Correspondence	N/A	
		Pre Employment	N/A	
		Insurance	Non Medical Insurance Claim	Deleted EXCEPT for sites in Pennsylvania
Facility	Facility	PFS	N/A	Deleted for all sites
Government	Government	Agency	OMAP	Deleted EXCEPT for sites in Oregon



Deleted Reasons for Request (Continued)

Major Class	Requester Type	Reason for Request		State limit?
		Primary	Secondary	
Insurance	Insurance	Non-Bill Correspondence	N/A	Deleted for all sites
		Pre Employment	N/A	
		Scan for Coding	N/A	
		Insurance	Non Medical Insurance Claim	Deleted EXCEPT for sites in Pennsylvania
Patient	Patient	Family	Family Transfer	Deleted for all sites
Direct Payor	PAYD	DRG	N/A	Deleted for all sites
		HEDIS	N/A	
		HIX Audit	N/A	
		RADV Audit	N/A	
		MRA Audit	N/A	
		CMS Audits — Non RAC	N/A	
		Non-Billable	N/A	
		Non-Billable Audit Project	N/A	
Indirect Payor	PAYI	CMS Audits — Non RAC	N/A	Deleted for all sites
		Non-Billable	N/A	
		Non-Billable Audit Project	N/A	



Enhancements and Fixes

Description	Enhancement or Fix
HealthSource now captures Stat Fax entries for alignment to Volume Counts/Status.	Enhancement
When Logging or Fulfilling a Request, the DOB field will be present the entire time and the field will not disappear.	Fix
After the user submits one patient on the Pull List and selects Previous , the Bill To fields will become non-editable.	Fix
For a Pull List Request type, after Logging, the user will be able to select Continue to input the patient information on the next screen.	Fix
When a Request status of Certification , Approval for Fulfillment , or Approval for Delivery , the user will not be able to put the Request On Hold (ALT+P) or Exception (ALT+O) using the shortcut keys.	Fix
When Logging or Fulfilling a DDS Request Type and the user checks the DDS Barcode Available box, the DDS Ship to State drop-down menu will list the states in alphabetical order.	Fix
When completing a Requester Search in Logging and Fulfillment, the Requester Search will not auto-populate based on the search. It will provide a list of the results to select from. The results will be displayed with Electronic delivery options first. If no requester is found, the verbiage will be displayed indicating the Requester was not found.	Fix

