HealthSource Clarity

v1.4.1 Release Notes

May 2019

Document History

Publication Date: May 10, 2019
Document Edition: 1.0

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HealthSource Clarity v1.4.1 Release Notes

This document describes the changes made in **HealthSource Clarity v1.4.1**:

> You **DON'T** need to install an updated **TrayApp** to use **v1.4.1**.

DRAG DOCUMENTS INTO REQUESTS
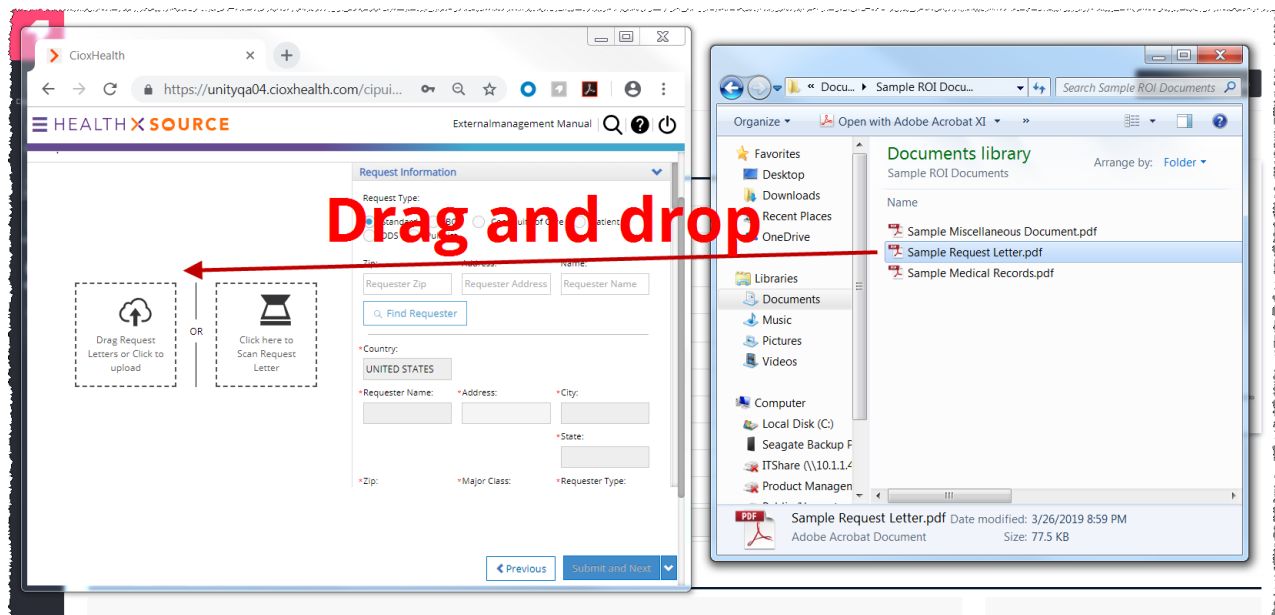
You can now drag and drop files into the **Documents** window for a request.

Document Type	Supported file types for drag / drop
Request Letter	PDF
Medical Records	• PDF
Miscellaneous Doc	• TIF • JPG

You **CANNOT** drag files to create **Correspondence** or an **Invoice**.

The **Documents** window has been updated to indicate that dragging is allowed:
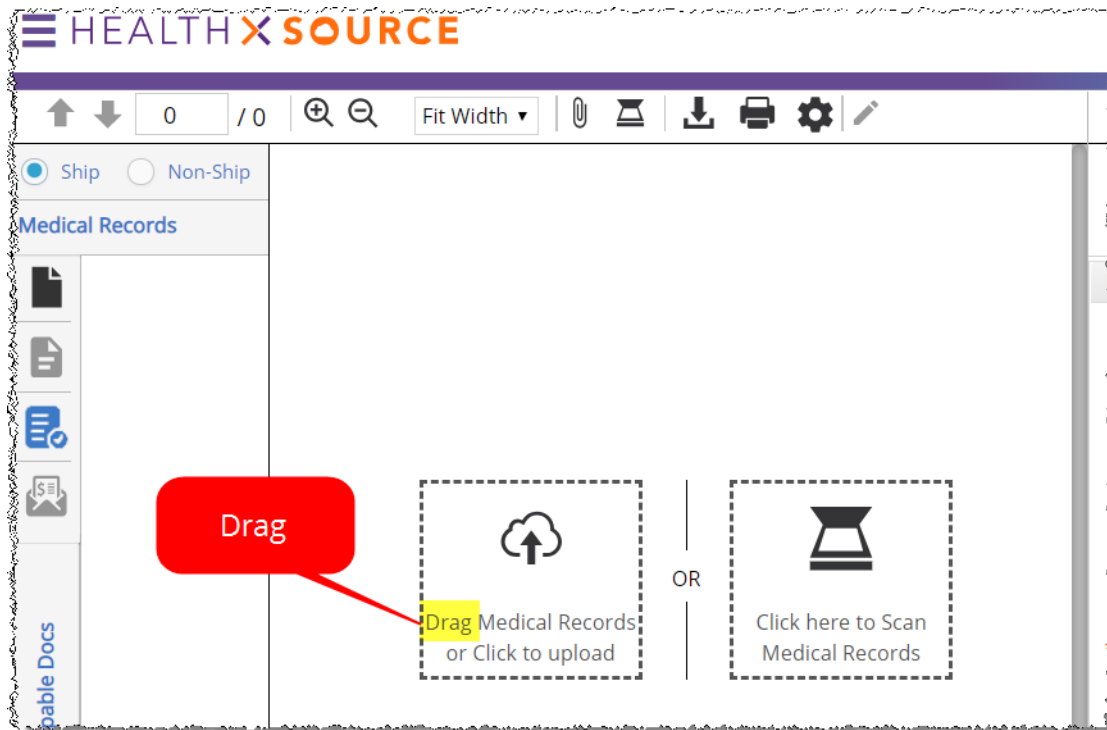
IMPROVED FIND REQUESTER FUNCTION

v1.4.1 makes many changes to the way you look for and select a requester:

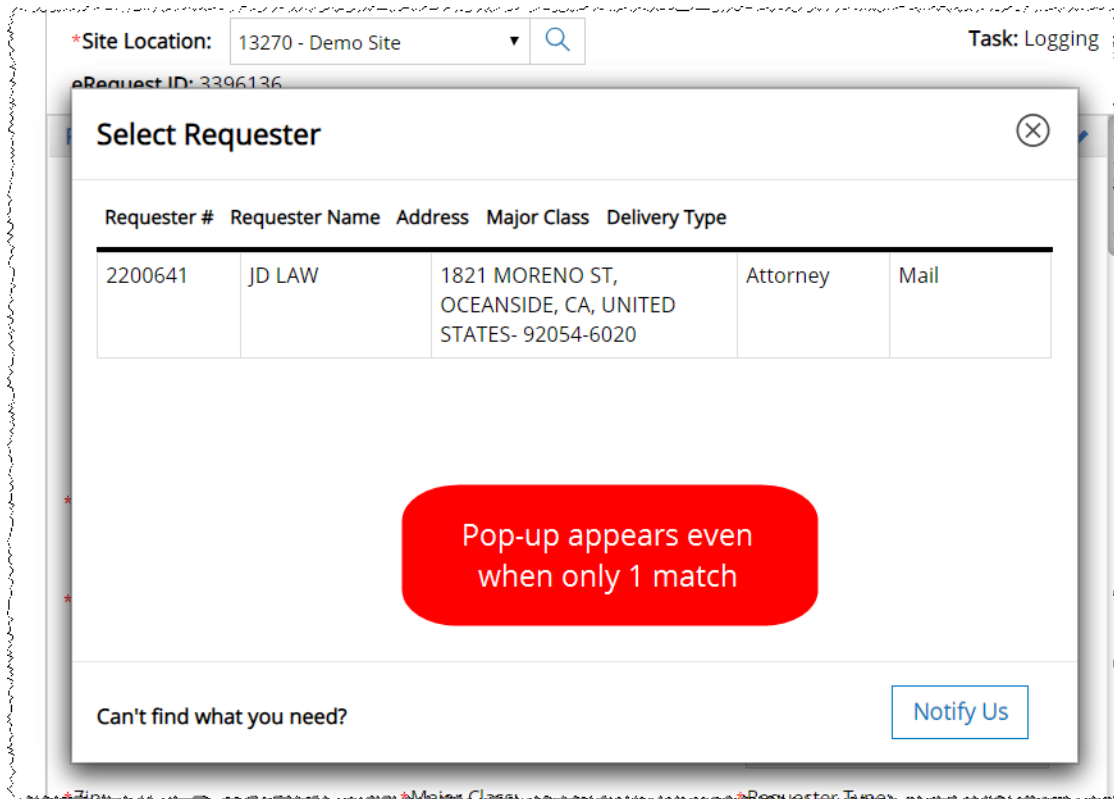| Change	See page
Requester Search fields ordered as Zip, Address, Name The new layout prioritizes location as a search value.	7
Select Requester pop-up appears even if only one match We no longer fill out the requester identification fields when a search finds only one match.	8
Electronic Delivery requesters listed first on Select Requester pop-up Sending Medical Records as electronic files is less expensive, faster, and more secure than sending hard copies.	9
Updated New Requester process • You no longer send work to the **New Requester** team from the regular **Request** screen; • A Request Letter is required before you can send work to the **New Requester** team; • It's easy to tell when the **New Requester** team has finished their work on a request.	10

Requester Search changes

The **Requester Search** fields are now ordered as **Zip**, **Address**, and **Name**.

The new layout prioritizes using location to lookup the requester, which improves your chances of finding and selecting the right match.

Select Requester pop-up appears even if only one match

The **Select Requester** pop-up now appears even when a search finds only one match. We no longer automatically fill out the requester identification fields in this situation.

| Site Location: | 13270 - Demo Site | | Task: Logging |

eRequest ID: 3396136

Select Requester

Requester #	Requester Name	Address	Major Class	Delivery Type
2200641	JD LAW	1821 MORENO ST, OCEANSIDE, CA, UNITED STATES- 92054-6020	Attorney	Mail

Pop-up appears even when only 1 match

Can't find what you need?   Notify Us

We made this change to reduce the chances of sending Medical Records to the wrong recipient (breach). The auto-fill process could pick a requester that did not match the Request Letter, either because the search values were wrong or because the requester database was outdated.

Electronic Delivery requesters listed first

The **Select Requester** pop-up now lists requesters that support **Electronic** delivery before any hard-copy choices.
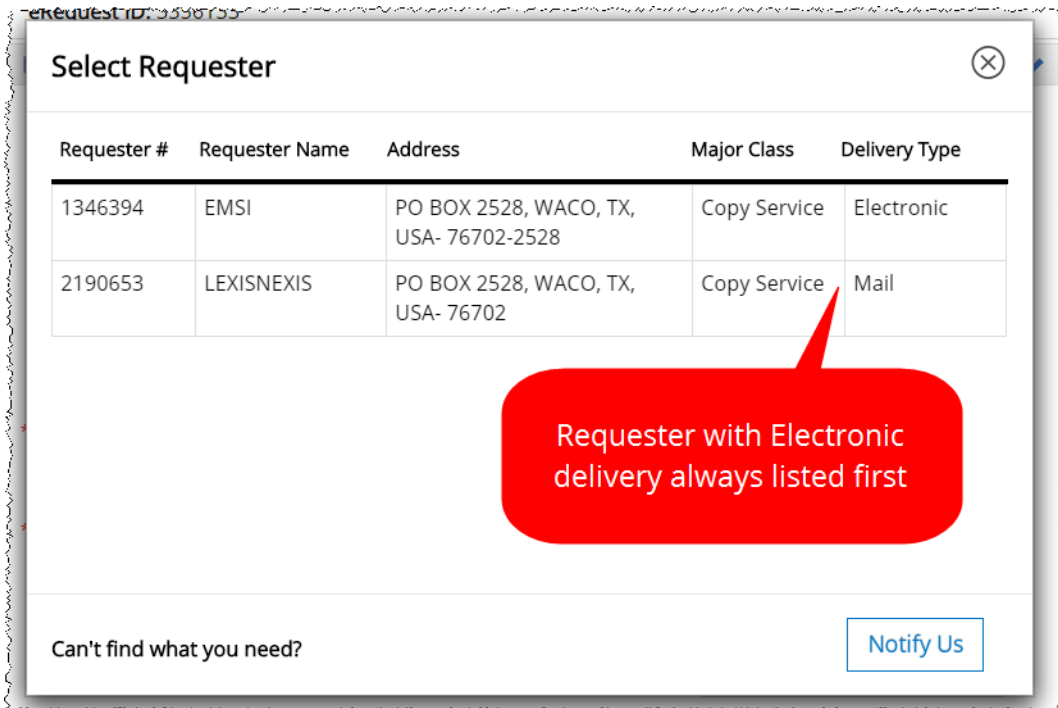
Sending Medical Records as electronic files is less expensive, faster, and more secure than sending hard copies. You should select **Electronic** delivery whenever possible.

Updated New Requester process

The regular **Request** screen used during **Logging** and **Fulfillment** no longer includes a **Create New Requester** button.

1. Use the **Find Requester** tool to look for the requester.

2. If no matches are found, click the **Submit to Requester Support** button on the **Select Requester** pop-up window.
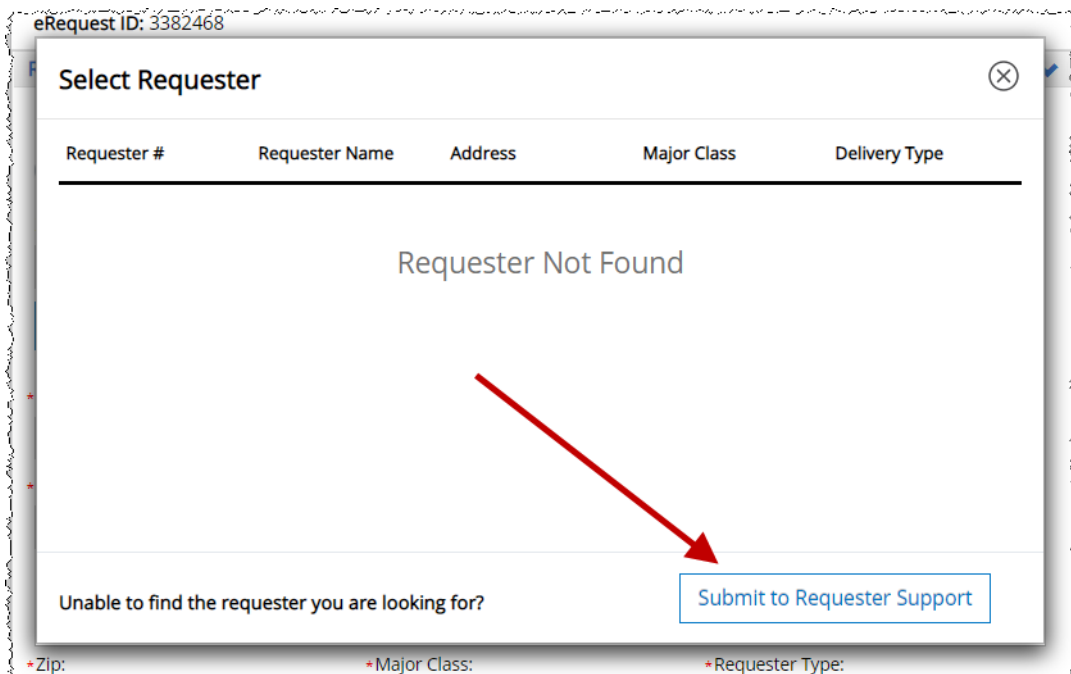
3. If there's no Request Letter attached, you're notified to add one before you can continue:
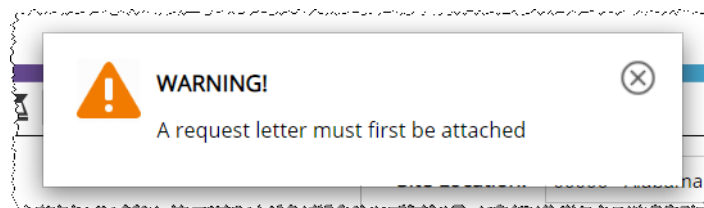
4. The **New Requester** team handles the request as usual — assigning an existing requester or creating a new one.

5. After the **New Requester** team saves the request, it returns to logging or fulfillment.

6. The **Data Entry** screen shows an **Approved** flag.

7. You **CANNOT** change the requester assigned by the **New Requester** team. This assignment is "locked." If you believe this assignment to be incorrect, you can:

   7.1 Change the **Request Type**, which clears the assigned requester;

   7.2 Flag the request as an **Exception**;

   7.3 Send **Correspondence** to the requester asking for more information;

   7.4 **Cancel** the request.

8. You're also prompted to verify the **Ship To** address:
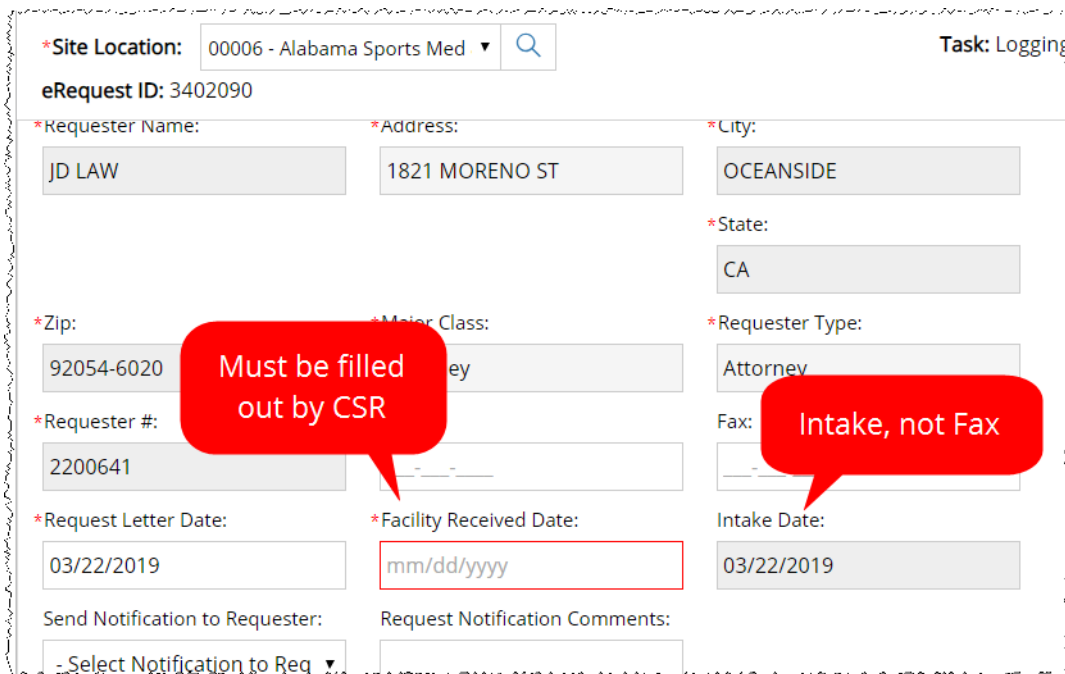
CHANGES TO DATE FIELDS

Intake Date replaces **Fax Date**	We've replaced the **Fax Date** field with **Intake Date**. This change reflects the fact that many requests enter the workflow through methods other than faxing. The purpose of the field remains the same — capturing when a request "entered" the **HealthSource Clarity** workflow.
Facility Received Date now blank for all requests	As of **v1.4.1**, the **Facility Received Date** field is **NOT** filled out automatically, no matter how the request was created. This date must be entered during **Logging**. It can be changed, if needed, during **Fulfillment**.

Date field changes and My Work Queue

My Work Queue now:

- includes a new **Intake Date** column;

- shows **Facility Rcvd Date** instead of **Received Date**. This column will now **ONLY** show the date, **NOT** a date and time stamp.

Date field changes and Request Search

The **Search Results** table now uses **Facility Rcvd Date** instead of **Received Date**.

BETTER DUPLICATE REQUEST DETECTION

Duplicate requests current make up almost 10% of Ciox Health's total volume. **Client Service Representatives** get no credit for that work and the company can't bill for it.

To reduce the impact of this problem, we're now:

• finding possible duplicates earlier;

• making our findings more obvious.

The table below summarizes the duplicate request process changes. You'll find more detailed information on pages 16 through 18.

Change	See page
The **Logging** screen now includes a **Potential Duplicate Request** indicator that shows: • Whether duplicate checking has occurred yet; • The # of possible duplicates.	15
Real-world checking of patient **First Name** values.	16
The **Potential Duplicates** grid now shows **MRN** and **Dates of Service**. This information may help eliminate "coincidental" matches without opening the request for comparison.	17
We check for duplicates when you log a **Pull List**.	18
Ignore requests that were cancelled or for which **Correspondence** was sent.	19

New Potential Duplicate Request indicator

The **Logging** screen now includes a **Potential Duplicate Request** indicator to the left of the **Comments** button.

The appearance of the indicator shows what has happened so far:

Duplicate check not run yet	Duplicate check run No duplicates found	Possible duplicates found (# of)
Typically appears before you enter **Patient Information**.	Appears after you enter **Patient Information** and no duplicates were found.	The number = how many possible duplicates were found. We found 1 possible match in the example. Click this "numbered" indicator to open the **Potential Duplicates** grid.

Real-world checking of First Name values

We now compare the first letter of the patient's **First Name**, rather than the entire value:

```
┌──────────────────┐        ◇                    ◇
│ Last Name matches│──Yes──▶ Match 1st character ──Yes──▶ DOB or SSN match ──Yes──▶ ┌──────────────────┐
│ existing request │        in First Name?              in existing request?       │ Notify of        │
└──────────────────┘                                                                │ potential        │
                             │ No          │ No                                     │ duplicates       │
                             └─────────────┘                                        └──────────────────┘
                                    │
                                    ▼
                             ┌──────────────────┐
                             │ No               │
                             │ potential        │
                             │ duplicates found │
                             └──────────────────┘
```
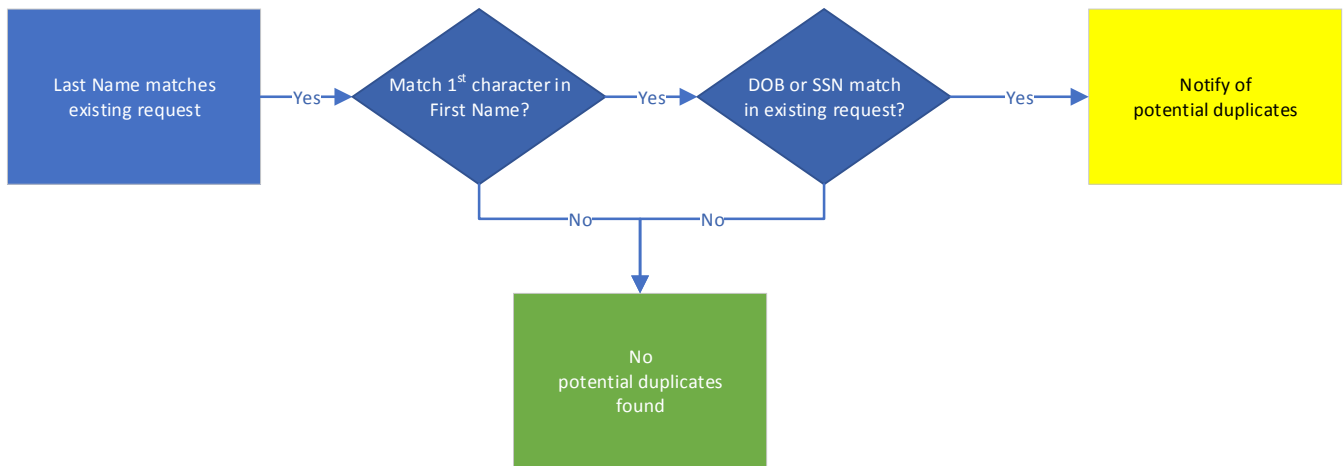
As always, we only compare the new request to existing requests:

• Logged at the same site;

• From the same requester.

This change lets us find matches when a Request Letter provides an initial, a shortened version of a name, a nickname, or a misspelling:

Full Name	Entered in First Name field	Explanation
Michael Dodge	Michael	Complete first name, no issues
	M	Initial instead of name
	Mike	Shortened version of name
	Mickey	Nickname
	Micheal	Misspelling

Potential Duplicate grid shows more information

We added three columns to the **Potential Duplicates** grid:

- MRN

- Service Start Date

- Service End Date

These columns will be blank if the matching data entry fields weren't filled out.

Potential Duplicates								
eRequest ID	Patient Name	DOB	SSN	MRN	Status	Facility Received Date	Service Start Date	Service End Date
3365349	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
3364150	Williams1 Derk1	08/11/1948			Fulfillment	01/25/2019	01/01/2017	12/31/2017
3363747	Williams1 Derk1	08/11/1948			Fulfillment	01/24/2019	01/01/2017	12/31/2017
3365766	Williams1 Derk1	08/11/1948			Fulfillment	01/28/2019	01/01/2017	12/31/2017
3364534	Williams1 Derk1	08/11/1948			Fulfillment	01/25/2019	01/01/2017	12/31/2017
3364920	Williams1 Derk1	08/11/1948			Fulfillment	01/25/2019	01/01/2017	12/31/2017
3368821	Williams1 Derk1	08/11/1948			Fulfillment	02/05/2019	01/01/2017	12/31/2017
3366179	Williams1 Derk1	08/11/1948			Fulfillment	01/29/2019	01/01/2017	12/31/2017
3361577	Williams1 Derk1	08/11/1948			Fulfillment	01/23/2019	01/01/2017	12/31/2017
3362351	Williams1 Derk1	08/11/1948			Fulfillment	01/23/2019	01/01/2017	12/31/2017
3364237	Williams1 Derk1	08/11/1948			Fulfillment	01/25/2019	01/01/2017	12/31/2017
3365043	Williams1 Derk1	08/11/1948			Fulfillment	01/25/2019	01/01/2017	12/31/2017
3361878	Williams1 Derk1	08/11/1948			Fulfillment	01/23/2019	01/01/2017	12/31/2017
3363554	Williams1 Derk1	08/11/1948			Fulfillment	01/24/2019	01/01/2017	12/31/2017
3363631	Williams1 Derk1	08/11/1948			Fulfillment	01/24/2019	01/01/2017	12/31/2017
3367771	Williams1 Derk1	08/11/1948			Fulfillment	01/31/2019	01/01/2017	12/31/2017
3364357	Williams1 Derk1	08/11/1948			Fulfillment	01/25/2019	01/01/2017	12/31/2017
3365596	Williams1 Derk1	08/11/1948			Fulfillment	01/28/2019	01/01/2017	12/31/2017
3364664	Williams1 Derk1	08/11/1948			Fulfillment	01/25/2019	01/01/2017	12/31/2017

This change helps 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 they're really separate, valid requests. For example:

Patient	DOB	SSN	MRN	Service Start Date	Service End Date
Honus Wagner	05/01/1948	123-45-6789	987654321	02/19/2018	02/21/2018
Honus Wagner	05/01/1948	123-45-6789	135798642	10/08/2018	10/12/2018

In the above example, the different **MRN** and **Dates of Service** show that the requests apply to two different encounters and are therefore **NOT** duplicates of each other. You wouldn't need to compare the requests side-by-side to figure that out.

Potential Duplicate Request indicator on Pull List screen

We now check for possible duplicates as you log a Pull List.

The check takes place after you enter the **Last Name** and **First Name** values for a patient on the **Pull List** screen.

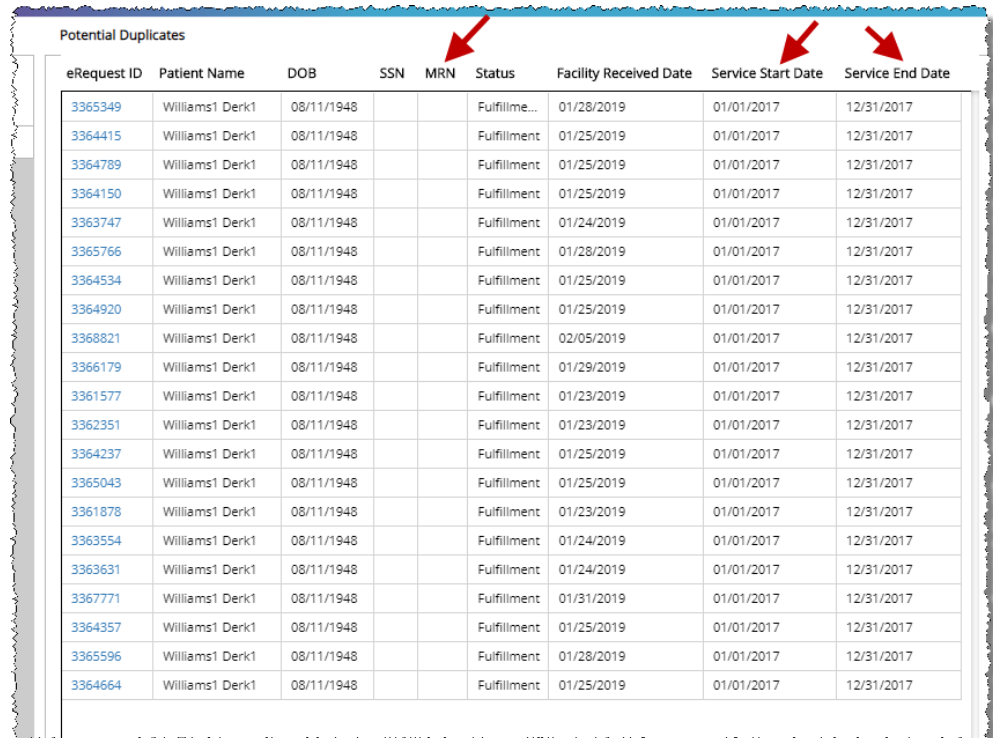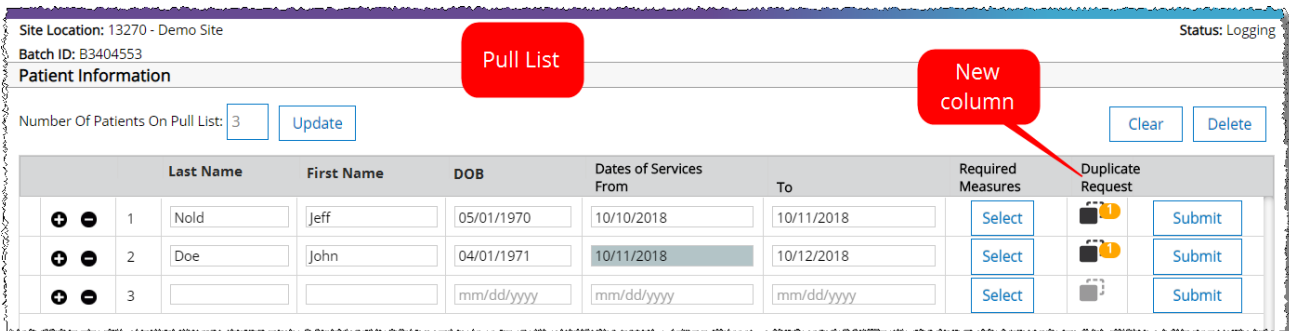The symbol in the new **Duplicate Request** column shows what has happened so far in the duplicate checking process:

Duplicate check not run yet	Duplicate check run No duplicates found	Possible duplicates found (# of)
You haven't entered the **Last Name** and **First Name** yet.	You entered the **Last Name** and **First Name** and we found no potential duplicates.	The number = how many possible duplicates were found. We found 1 possible match in the example. Click this "numbered" indicator to open the **Potential Duplicates** grid.

This symbol works the same way as the new **Potential Duplicate Request** indicator on the **Logging** screen (page 15).

Canceled and Correspondence requests not checked

We no longer check for duplicates among two "populations" of requests:

- Canceled (deleted);

- Closed because we sent **Correspondence** to the requester.

We don't capture and deliver Medical Records for these kinds of requests. Since a duplicate request is defined as one for which we've already captured Medical Records, it's impossible to duplicate those for which we did **NOT** capture records. There's no reason to look for possible duplicates among those items.

This change will speed up the duplicate checking process.

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. See the tables on the next several pages for details on geographic limits.

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: • 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: • 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

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	

Invoice Types for updated Reasons for Requests

Major Class	Requester Type	Reason for Request (Primary — Secondary)	Change	Invoice
Attorney	Attorney	Represent Indigent — N/A	Add	114
		SSA Appeal Representative Form 1696 — N/A	Add	113
		Patient Social Security Appeal — N/A	Add	112
		Coding Summary — N/A	Delete	107
		Patient Social Security for WA Appeal — N/A	Delete	112
		Personal Injury — Non Profit	Delete	89
		Scan for Coding — N/A	Delete	87
ConCare	ConCare	Hospice — N/A	Delete	54
Copy Service	Attorney	Represent Indigent — N/A	Add	114
		SSA Appeal Representative Form 1696 — N/A	Add	113
		Patient Social Security Appeal — N/A	Add	112
		Coding Summary — N/A	Delete	107
		Patient Social Security for WA Appeal — N/A	Delete	112
		Personal Injury — Non Profit	Delete	89
		Scan for Coding — N/A	Delete	87
		State Attorney Office — N/A	Delete	47

Major Class	Requester Type	Reason for Request (Primary — Secondary)	Change	Invoice
Copy Service	Insurance	Audits — Non-Billable Audits	Delete	104
		Hospital Lien	Add	30
		Non-Bill Correspondence — N/A	Delete	89
		Pre Employment — N/A	Delete	08
		Insurance— Non Medical Insurance Claim	Delete	77
Facility	Facility	PFS — N/A	Delete	05
Government	Government	Agency — OMAP	Delete	17
Insurance	Insurance	APS — N/A	Add	110
		Hospital Lien	Add	30
		Non-Bill Correspondence — N/A	Delete	89
		Pre Employment — N/A	Delete	08
		Insurance — Non Medical Insurance Claim	Delete	77
		Scan for Coding — N/A	Delete	87
Indirect Payor	PAYI	Insurance Claim — N/A	Add	24
		CMS Audits (Non RAC) — N/A	Delete	94
		Non-Billable — N/A	Delete	89
		Non-Billable Audit Project — N/A	Delete	104
Patient	Patient	Family — Family Transfer	Delete	15

Major Class	Requester Type	Reason for Request (Primary — Secondary)	Change	Invoice
PAYD	PAYD	Ciox Audit — N/A	Add	300
		DRG — N/A	Delete	95
		HEDIS — N/A	Delete	39
		HIX Audit — N/A	Delete	105
		RADV Audit — N/A	Delete	106
		MRA Audit — N/A	Delete	50
		CMS Audits — Non RAC	Delete	94
		Non-Billable	Delete	89
		Non-Billable Audit Project	Delete	104

What about requests that used Reasons that have been deleted?

If an in-progress request used one of the **Reasons for Request** that have been deleted (page 21), we'll either clear the **Reason for Request** value or leave it as-is, depending on the **Task Type**.

Reason for Request cleared out

IF

the request's **Task Type** is:

Logging	Returned to Logging	Fulfillment On Hold
Logging Correspondence	Split	Fulfillment Pend
Logging Exception	Fulfillment	Back to Fulfillment
Logging On Hold	Fulfillment Correspondence	Fulfillment New Requester
Logging QC	Fulfillment Exception	New Requester

THEN

we'll clear out the deleted **Reason for Request** value;

AND

a "replacement" **Reason for Request** will need to be assigned when the request is opened again.

Reason for Request retained

For requests that are "finished" in **HealthSource Clarity**, we'll leave the **Reason for Request** value alone, even if the **Reason** is no longer available:

Acknowledgment (Failure or Received)	Exceptions	Ready (Delivery or Indexing)
Approval for (Fulfillment or Delivery) *	FACC (Accepted or Failure)	Sent for Processing
Batch Completed	Indexing	Split Completed
Canceled (Logging or Fulfillment)	Invoicing	Submitted
Certification *	Package Error	Transmitted
Delivered	Pricing	Sent for Processing

* if the request is not approved or not certified, it will go back to **Logging** or **Fulfillment** and we will automatically clear the **Reason for Request** field(s).

DEFECTS FIXED

These known issues have been addressed in **HealthSource Clarity v1.4.1**:

The **DDS Ship to State** field lists states in alphabetical order for easier searching.

The **Log Request** command on **My Dashboard** now works regardless of the number of pending requests.

Previously, if there were no **Logging** requests among the first 1,000 requests in the work queue, the **Log Request** command returned an error.

The **Fulfill Request** command on **My Dashboard** now works regardless of the number of pending requests.

Previously, if there were no **Fulfillment** requests among the first 1,000 requests in the work queue, the **Fulfill Request** command returned an error.

The **Save and Next** command on the **Logging** page now works regardless of the number of pending requests.

Previously, if there were no **Logging** requests among the first 1,000 requests in the work queue, the **Save and Next** command returned an error.

The **Save and Next** command on the **Fulfillment** page now works regardless of the number of pending requests.

Previously, if there were no **Fulfillment** requests among the first 1,000 requests in the work queue, the **Save and Next** command returned an error.

The **Requester Information** (Name, Address, Major Class, etc.) will no longer be cleared if a user clicks the **Request Type** option that was already selected.

While choosing a different **Request Type** should clear the **Requester Information**, re-selecting the same option should not and no longer will do so.

The display of the **DOB** field can no longer be controlled through the **Site Preferences**. This option caused the **DOB** field to be replaced with **Gender** at some Sites.

Slow performance on **My Dashboard** has been improved.

The **Medical Record Page Count** numbers from a **Fulfillment** request are no longer being "carried over" to the next **Logging** request opened by the same user.

Bill To fields will no longer editable for a **Pull List** after at least one "child" request has been submitted.

If you log a **Pull List** request, you can now click **Continue** and immediately begin adding "child" requests rather than saving the "parent" and then reopening it.

Requests can no longer be put **On Hold** or flagged as **Exceptions** when the **Task Type** =

• Certification
• Approval for Fulfillment
• Approval for Delivery

Miscellaneous Documents (non-shippable) can now be viewed after a request has been submitted from **Fulfillment**.

These requests were not being displayed properly after entering the back-end ROI workflow (indexing, invoicing, billing, delivery, etc.).

The **Request History** is now properly updated when **Correspondence** is created. Previously:

• the **User Name** value for these events was "1" instead of the user's actual name;
• the document was described as a **Medical Record** (MR) instead of **Correspondence**.

Indirect Chase requests for requesters who do not require a specific patient identifier will no longer fail during upload.

Redacting a Request Letter no longer results in an error.

When Continuing Care (fax) requests are migrated from **eSmartLog** to **HealthSource Clarity**, an **eRequest ID** will be created to support reconciliation and reporting.

When a request is **Split** and the "parent" request moved to **Fulfillment**, we will automatically add a **Scan Date** to the matching request in **eSmartLog** so that it does not remain Pending indefinitely.

If a **Request Type** is changed to **Pull List** or **Split** during **Fulfillment** and then sent back to **Logging**, we will delete the matching **Request ID** in **eSmartLog**.

Site matching has been improved between **eSmartLog** and **HealthSource Clarity** for non-payor requests.