



HealthSource Clarity

v1.4 Release Notes

February 2019



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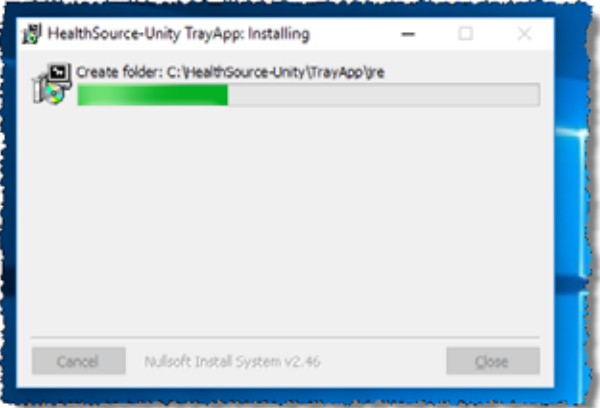
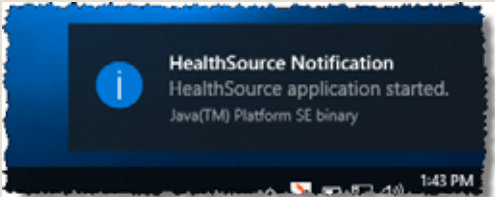
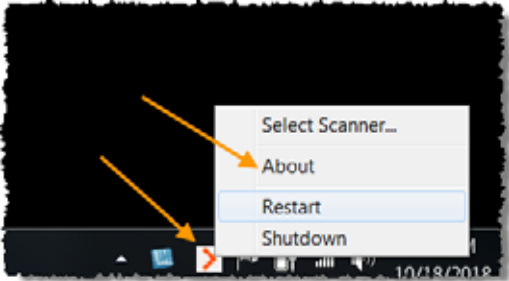
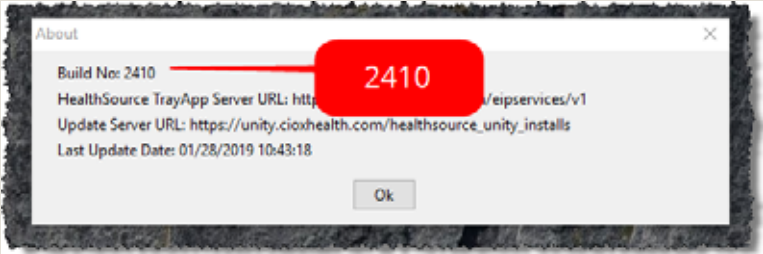
HealthSource Clarity v1.4 Release Notes

Topic	See page
TrayApp update required	4
Add Miscellaneous Documents to a request	6
Enhancements to Request Search	9
Improved Dashboard	14
Requested By field automatically filled out	17
Changes to Due Dates	18
Make Account Number a required field for specific Sites	19
Identify requests related to Two Midnight rule	21
Improved duplicate request detection	24
Support for HEDIS Pull Lists	25
Certification allowed for more requests	28

TRAYAPP UPDATE REQUIRED

To use **HealthSource Clarity v1.4**, you **MUST** update the **TrayApp**.

<p>Log into HealthSource Clarity and wait until the Update bar closes.</p>	
<p>Click Install on the Info box.</p>	
<p>HealthSource Clarity logs you out.</p>	
<p>Close your browser completely.</p>	
<p>The TrayApp shuts down automatically. This step happens so quickly you may not see the popup window.</p>	
<p>HealthSource Clarity downloads and validates the new version of the TrayApp.</p>	

<p>The TrayApp update installs itself.</p>	
<p>The updated TrayApp starts itself.</p>	
<p>Right-click the TrayApp in your Windows Tray and select About.</p>	
<p>Does the Build No = 2410 ?</p>	
<ul style="list-style-type: none"> • YES — Click OK. 	
<ul style="list-style-type: none"> • NO — Contact Customer Care at 877-358-6939. 	

ADD MISCELLANEOUS DOCUMENTS TO A REQUEST

You can now attach **Miscellaneous Documents** to a request.

We do **NOT**:

- Deliver these documents to the requester;
- Bill the requester for them, regardless of page count.

What's it for?

The most common **Miscellaneous Document** is a checklist that must be filled out as part of the Release of Information process for specific facilities or customers. Not all facilities / customers require this kind of checklist.

Do **NOT** use the **Miscellaneous Documents** option to capture:

- Medical Records beyond those identified in the Request Letter. The **Miscellaneous Document** option must **NOT** be used as a "storage" option for possible future requests.
- Modifications to the Request Letter. Anything that defines **WHO** is asking for the Medical Records and **WHAT** records should be captured **MUST** be attached as part of the Request Letter.

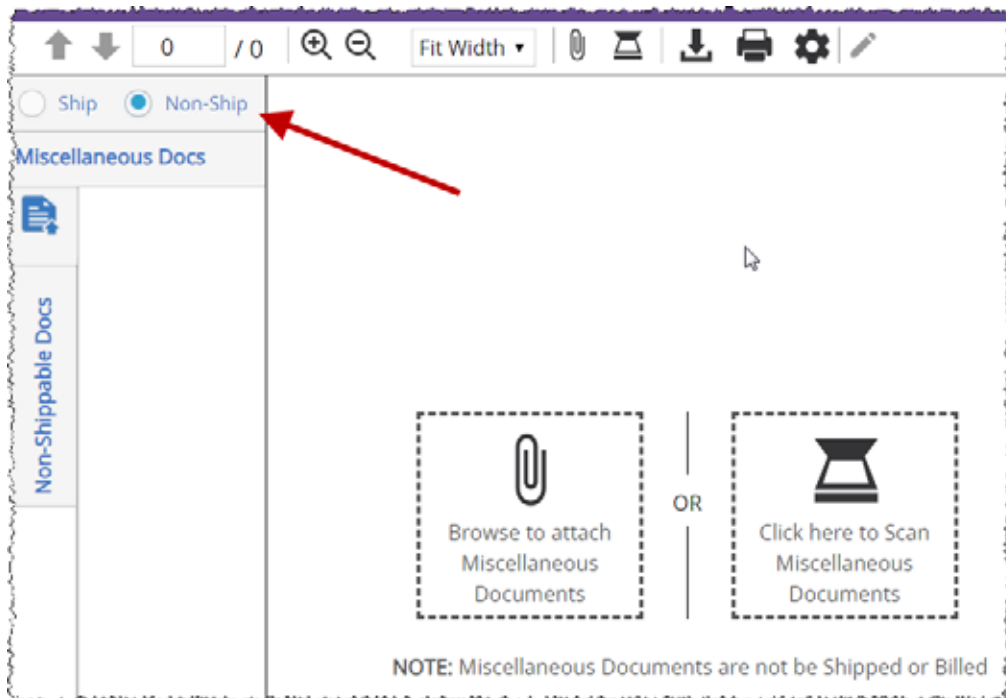
Can other users see the Miscellaneous Documents?

Yes, **Miscellaneous Documents** can be viewed by other **HealthSource Clarity** users.


They are **NOT** visible in other Ciox Health applications, such as **eSmartLog**, **CorpWeb**, or **AudaPro**.

Attach a Miscellaneous Document

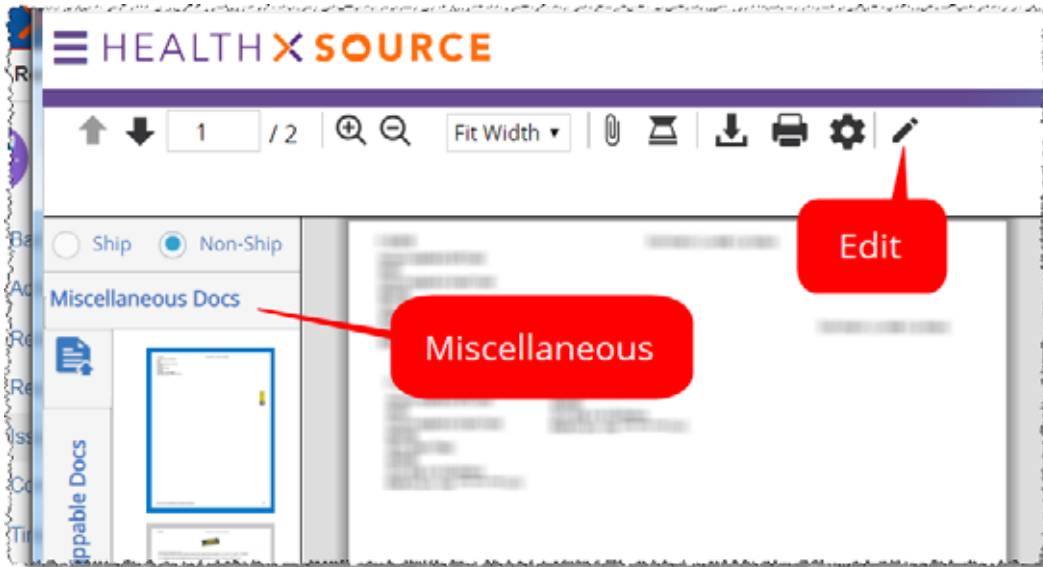
1. Open a request for **Fulfillment** (includes those that are **Pending**, **On Hold**, or flagged as **Exceptions**).
2. Select the **Non-Ship** button in the **Documents** window.



3. Attach or scan the document.

	<p>You can attach these file types:</p> <ul style="list-style-type: none">• PDF• JPG• TIF
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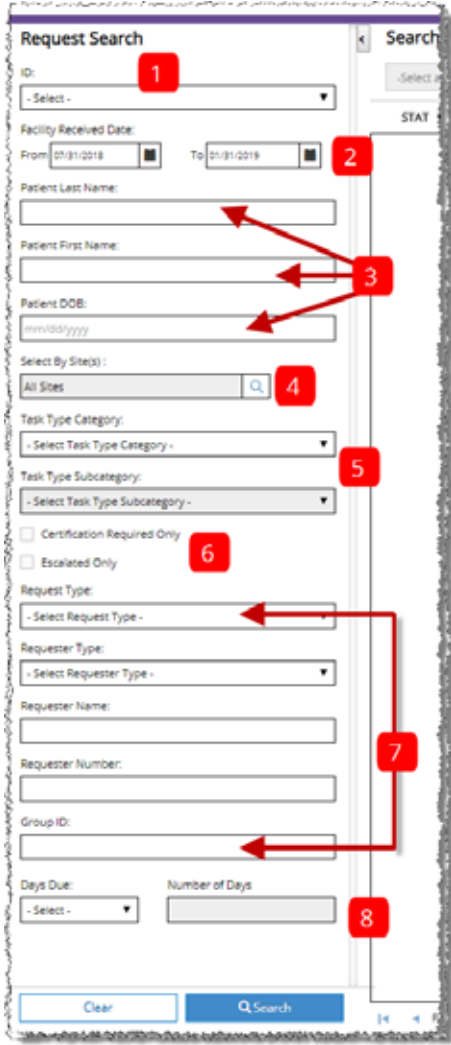
4. You can **Edit** (rotate, reorder, delete) the pages of a miscellaneous document in the same way as Medical Records.



5. Finish fulfillment of the request as usual.

ENHANCEMENTS TO REQUEST SEARCH

We've reorganized the **Request Search** page and added two new helpful search options. The new layout groups similar search fields together and prioritizes those that are used most often.

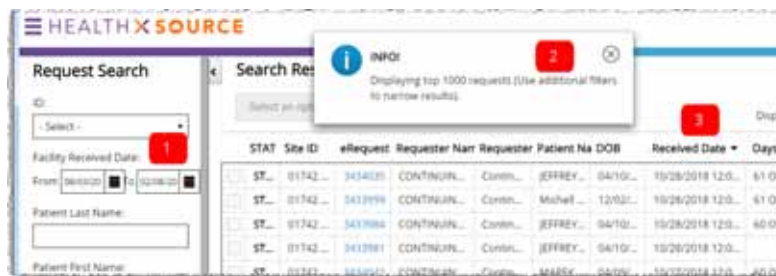
 <p>The screenshot shows the 'Request Search' form with the following fields and callouts:</p> <ul style="list-style-type: none"> 1: ID dropdown menu 2: Facility Received Date range (From/To) 3: Patient Last Name and Patient First Name text boxes 4: Patient DOB text box 5: Select By Site(s) dropdown menu 6: Certification Required Only and Escalated Only checkboxes 7: Request Type, Requester Type, Requester Name, and Requester Number text boxes 8: Days Due dropdown menu and Number of Days text box 	<p>Search by a specific request identification value:</p> <ul style="list-style-type: none"> eRequest ID Log ID Invoice <p>Find requests in a specific date range.</p> <p>Search by patient identification values.</p> <p>Search requests at a specific site or sites.</p> <p>Search by the current status of the request.</p> <p>NEW options that limit the Search Results to include:</p> <ul style="list-style-type: none"> Requests that require Certification; Requests that have been Escalated. <p>Escalation is an optional site-level setting. See page 11 for more information on using these options.</p> <p>Search by requester identification values.</p> <p>Search by Due Date / how many days a request is overdue.</p>
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Search results limits

The **Request Search** is now limited to the oldest 1,000 requests that meet your search criteria. The age of the requests is measured by the **Received Date**.

You'll be notified if the search results have been "cut off." Change your search criteria to find the requests that you really need to see. For example:

1. Search for all requests received between 08/03/2018 and 02/08/2019.
2. You're notified that only the top 1,000 results are being displayed.
3. Sort by **Received Date**. Note that the newest request was received on 10/28/ 2018.



4. Change the search to find requests received between 12/02/2018 and 02/08/2019.
5. The "1,000 results" notifications appears again.
6. The most recent request in the revised **Search Results** was received on 12/18/2018.

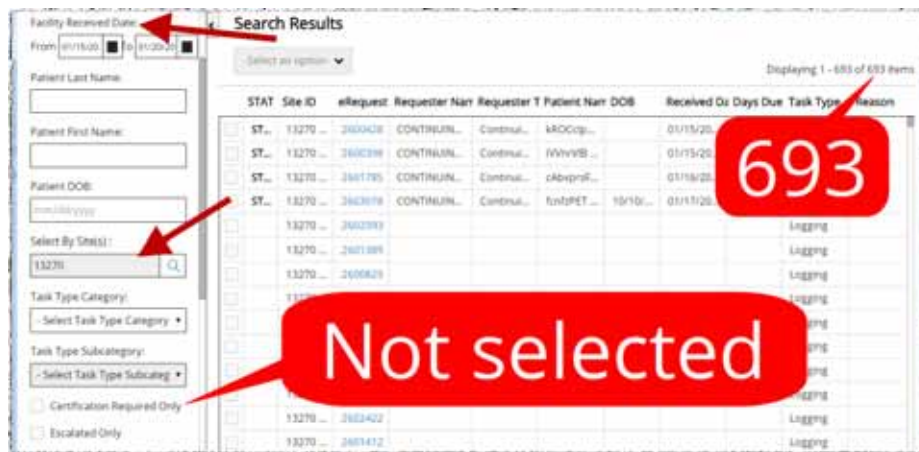


Certification and Escalation checkboxes

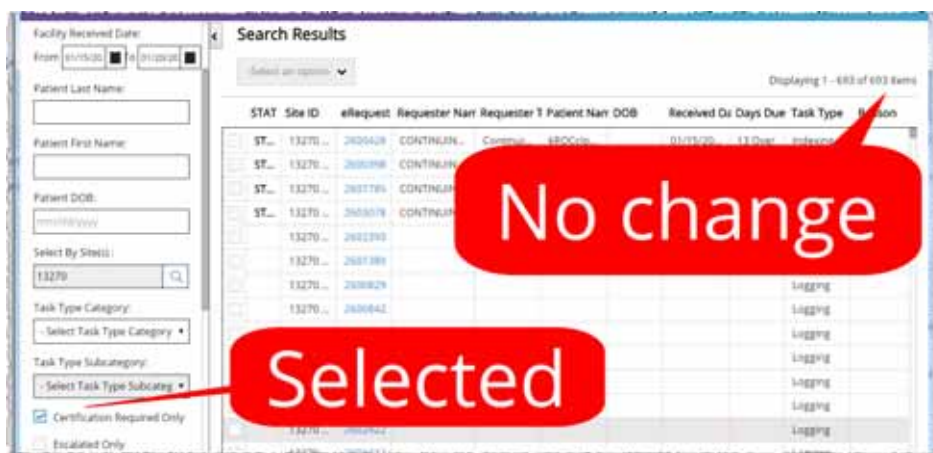
The new **Certification** and **Escalation** search options define the requests that are returned in the **Search Results**. They are **NOT** filters that can be applied to the **Search Results**.

For example:

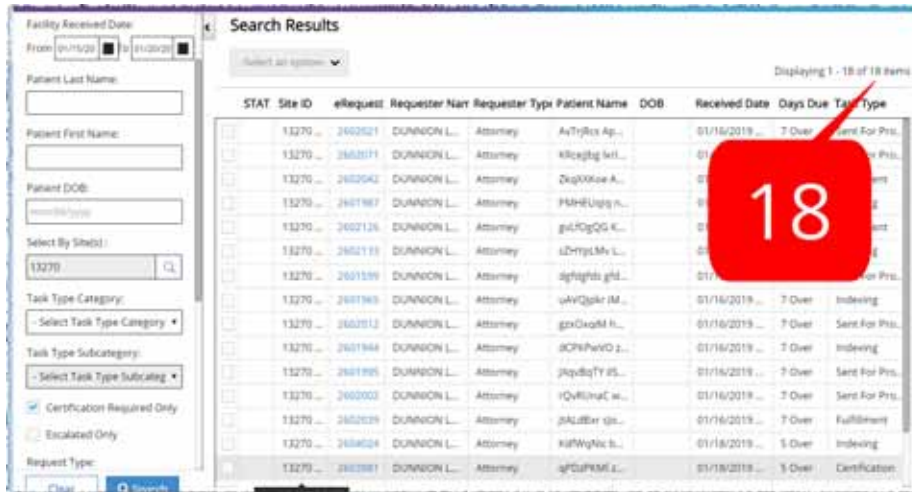
1. You search for requests at Site 13270 received between January 15 and January 20. For this search, the **Certification Required Only** checkbox is **NOT** selected.
2. Your search returns 693 requests.



3. If you simply select **Certification Required Only**, the **Search Results** do **NOT** change.



4. To see requests that were received at Site 13270 in the date range **AND** that need to be certified, select the **Certification Required Only** checkbox and run the search again.
5. Note that there are now only 18 requests in the **Search Results**.



The screenshot shows the 'Search Results' interface. On the left, there are search filters including 'Facility Received Date' (From: 01/15/2019, To: 01/20/2019), 'Patient Last Name', 'Patient First Name', 'Patient DOB', 'Select By Site(s):' (13270), 'Task Type Category', 'Task Type Subcategory', and 'Request Type'. The 'Certification Required Only' checkbox is checked. The main area displays a table with 18 rows of search results. A red box with the number '18' is overlaid on the table, indicating the total number of results displayed.

STAT	Site ID	#Request	Requester Name	Requester Type	Patient Name	DOB	Received Date	Days Due	Task Type
	13270	2602521	DUNNION L.	Attorney	AvTrRx Ap...		01/16/2019	7 Over	Sent For Prt...
	13270	2602511	DUNNION L.	Attorney	Klcejtg lat...		01/16/2019	7 Over	Sent For Prt...
	13270	2602542	DUNNION L.	Attorney	ZepXKoe A.		01/16/2019	7 Over	Sent For Prt...
	13270	2601987	DUNNION L.	Attorney	FMH Ugg n...		01/16/2019	7 Over	Sent For Prt...
	13270	2602126	DUNNION L.	Attorney	gvlDgQG K.		01/16/2019	7 Over	Sent For Prt...
	13270	2602133	DUNNION L.	Attorney	lZTrjyLM L.		01/16/2019	7 Over	Sent For Prt...
	13270	2601559	DUNNION L.	Attorney	dyfjgfd ghd...		01/16/2019	7 Over	Sent For Prt...
	13270	2601965	DUNNION L.	Attorney	vAVQskr JM...		01/16/2019	7 Over	Incoming
	13270	2602012	DUNNION L.	Attorney	gsvOxM H...		01/16/2019	7 Over	Sent For Prt...
	13270	2601944	DUNNION L.	Attorney	sCPsPwVO z...		01/16/2019	7 Over	Incoming
	13270	2601895	DUNNION L.	Attorney	JQydlqTY eS...		01/16/2019	7 Over	Sent For Prt...
	13270	2602003	DUNNION L.	Attorney	IQvRlnuAC w...		01/16/2019	7 Over	Sent For Prt...
	13270	2602029	DUNNION L.	Attorney	JALlBer qj...		01/16/2019	7 Over	Fulfillment
	13270	2604024	DUNNION L.	Attorney	KlRWyNc h...		01/16/2019	5 Over	Incoming
	13270	2603381	DUNNION L.	Attorney	qDuPMM L...		01/18/2019	3 Over	Certification

Looking for requests in the Certification workflow?

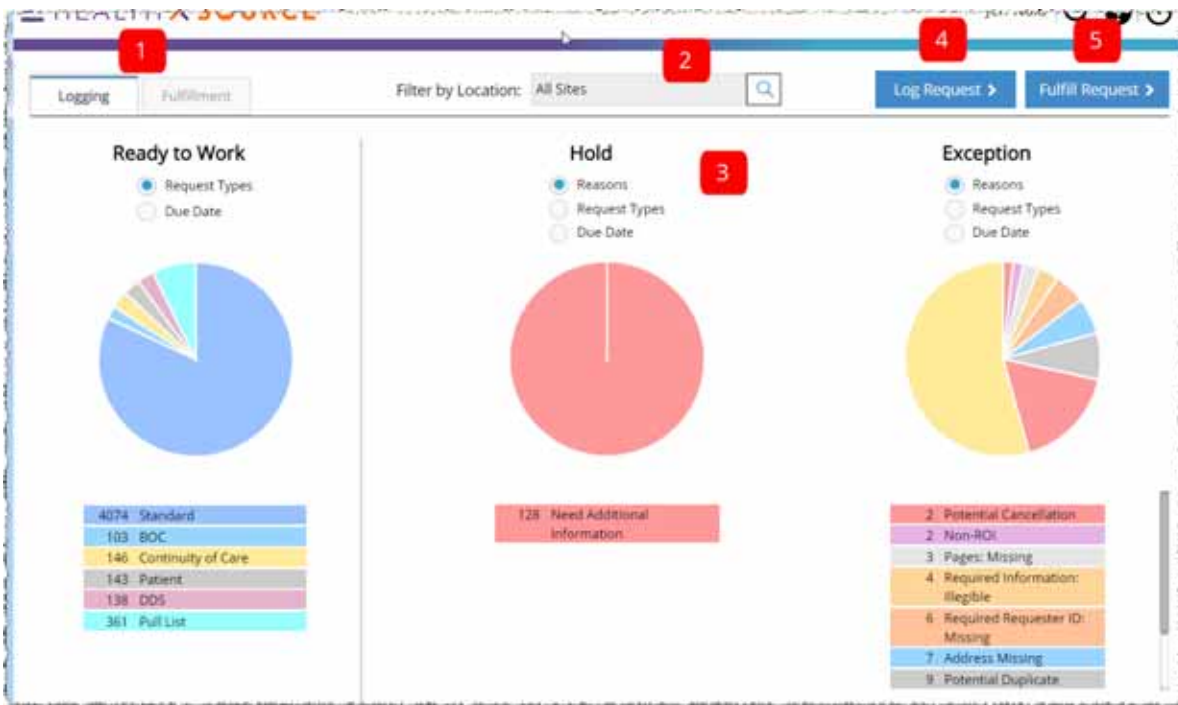
Use the **Task Type Category** and **Task Type Subcategory** search options in combination with the **Certification Required Only** checkbox to find specific kinds of requests:

Task Type		Finds this kind of request
Category	Subcategory	
Logging	Any	<p>Certification was manually selected during Logging;</p> <p>AND</p> <p>Has not yet been submitted for Fulfillment.</p> <p>AND</p> <p>Matches the Task Type Subcategory, if any.</p>
Fulfillment	Any	<p>Certification was enabled when the request was submitted from Logging.</p> <p>OR</p> <p>Certification was enabled during Fulfillment.</p> <p>AND</p> <p>Has not yet been submitted from Fulfillment.</p> <p>AND</p> <p>Matches the Task Type Subcategory, if any.</p>
Package and Delivery	Certification	Medical Records are ready to be reviewed for Certification .

IMPROVED DASHBOARD

The **Dashboard** now provides more information and is easier to use.

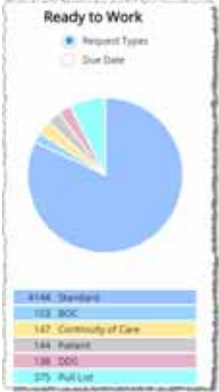

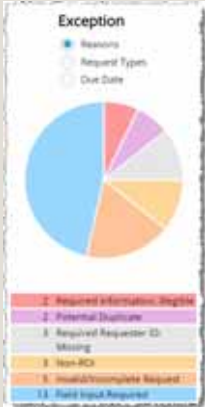

The **Dashboard** is available for **Client Service Representatives** and **Logger Centralized Supervisors** (who see only the **Logging** tab).



1	Determines what requests appear on the Dashboard — logging or fulfilling.
2	You can choose to see requests only from a specific site or sites. By default, the Dashboard shows requests from all sites to which you are assigned.
3	The Charts break down requests by workflow. See page 15 for details.
4	Fetches the next available request with a Task Type of <u>Logging</u> .
5	Fetches the next available request with a Task Type of <u>Fulfillment</u> , <u>Approval for Fulfillment</u> , or <u>Approval for Delivery</u> . The Approval workflow is optional and configured on a site-by-site basis.

Dashboard pie charts

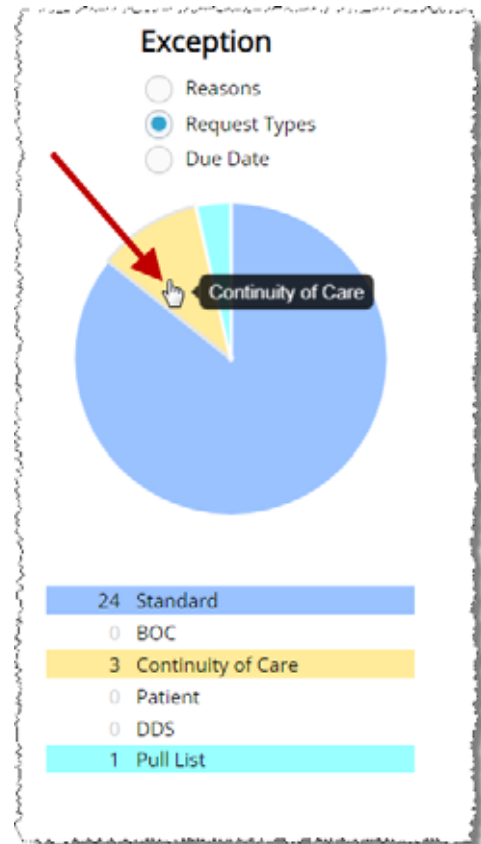
These pie charts provide a visual representation of different request “categories.”

<p style="text-align: center;">Ready to Work</p> <p>Requests that can be logged or fulfilled immediately.</p>  <p>Can be organized by Request Type or Due Date.</p>	<p style="text-align: center;">Hold</p> <ul style="list-style-type: none"> • CSR = requests that YOU put On Hold. • Logger Centralized Supervisor = requests put On Hold by Centralized Loggers.  <p>Can be organized by Reason, Request Type, or Due Date.</p>
<p style="text-align: center;">Exception</p> <p>Requests currently flagged as Exceptions.</p>  <p>Can be organized by Reason, Request Type, or Due Date.</p>	<p style="text-align: center;">Pending (Fulfillment tab only)</p> <p>Requests currently Pended.</p>  <p>Can be organized by Reason, Request Type, or Due Date.</p>

View request details

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

1. Click the appropriate "pie slice." In the example to the right, we've clicked **Continuity of Care** in the **Exceptions** chart, which is organized by **Request Types**.
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.



Search Results

Select an option ▾

Displaying 1 - 3 of 3 items



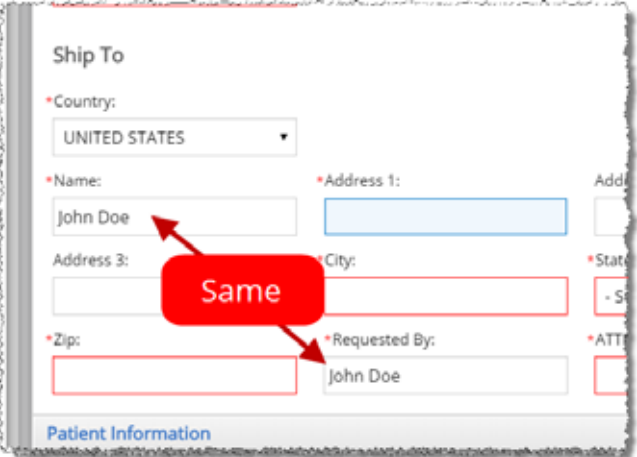
STAT	Site ID	eRequest ID	Requester Name	Requester Type	Patient Name	DOB	Received Date	Days Due	Task Type	Reason
<input type="checkbox"/>	STAT	03919 - PL... 2385995	CONTINUING CA...	Continuing C...	Patricia Green...		10/10/2010 1...		Logging Exce...	Required Inf...
<input type="checkbox"/>	STAT	03919 - PL... 2517858	CONTINUING CA...	Continuing C...	Patricia Green...	11/25/...	10/20/2018 1...	45 Over	Logging Exce...	Potential Du...
<input type="checkbox"/>	STAT	00010 - E... 2598427	CONTINUING CA...	Continuing C...	Patricia Green...		01/10/2019 1...	13 Over	Logging Exce...	Field Input R...

REQUESTED BY FIELD AUTOMATICALLY FILLED OUT

We now automatically enter a value in the **Requested By** field, located in the **Ship To** section of the **Request** screen. This change will reduce billing / invoicing issues.

You **CAN** change the auto-filled **Requested By** values.

How we determine the **Requested By** entry depends on the **Request Type**:

Standard, BOC, Patient, DDS, Pull List, Audit	Continuity of Care
<p>Requested By automatically filled with Requester Name value.</p>  	<p>Requested By automatically filled with Name value in Ship To section.</p> 

CHANGES TO DUE DATES

We've changed how **HealthSource Clarity** handles **Due Date** values.

Enter Due Date directly

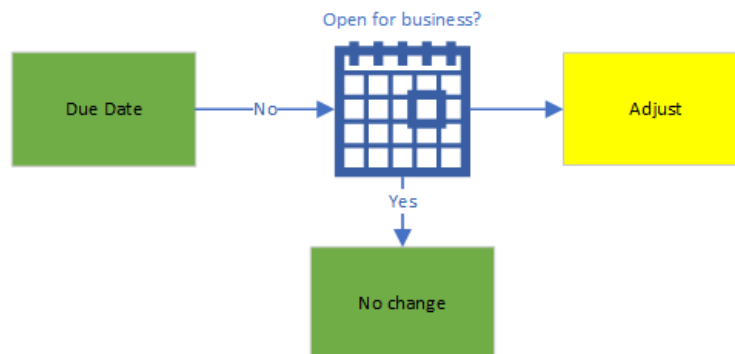
You can now enter the **Due Date** directly. Previously, you could only enter the **No of Days to Complete** and then we'd calculate the **Due Date**.

If you enter the **Due Date**, the **No of Days to Complete** field is **NOT** editable.

Adjusted for business days

If Ciox Health isn't open on the **Due Date**, we automatically "push" it to the next business day. This adjustment occurs however the **Due Date** is determined:

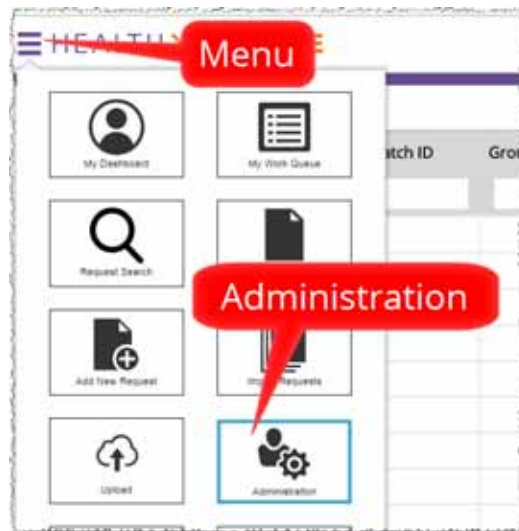
- By adding **No of Days to Complete** to the **Facility Received Date**;
- By directly entering the **Due Date**;
- Through the **Due Date Management** process (optional).



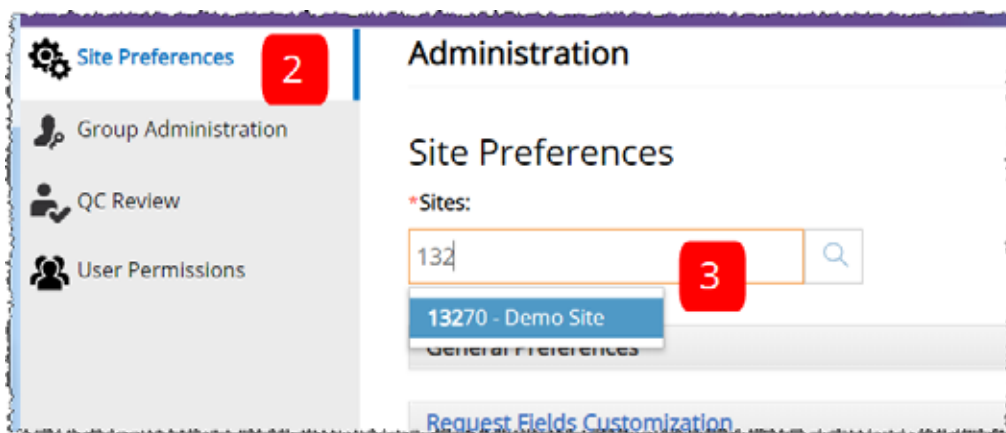
MAKE ACCOUNT NUMBER A REQUIRED FIELD FOR SPECIFIC SITES

Group Administrators can make the **Patient Account / Control #** field required for all requests at a specific Site.

1. From the **Menu**, select **Administration**.



2. On the **Administration** screen, click **Site Preferences**.
3. Enter the **Site Number** in the **Sites** field and select the appropriate match.



4. Open the **Request Fields Customization** section.
5. Decide if you want the **Patient Account / Control #** field to be required on the **Logging** or **Fulfillment** screens.



We suggest making the field required for **BOTH** the **Logging** and **Fulfillment** steps.

If it's only required during **Logging**, a **CSR** could clear the value during **Fulfillment** and leave it blank.

6. Select the **Required** checkbox for the **Patient Account / Control #** field.
7. **Save** the **Site Preferences**.

The screenshot shows the 'Request Fields Customization' section of a web application. At the top, there is a search bar for 'Sites' containing '13270 - Demo Site'. Below this is a 'General Preferences' section. The 'Request Fields Customization' section is highlighted with a red box and a red callout '4'. It contains two radio buttons: 'Logging' (selected) and 'Fulfillment'. Below the radio buttons are two checkboxes: 'Display' and 'Required'. A red callout '5' points to the 'Display' checkbox. A table follows, divided into 'Patient Information' and 'Request Information' sections. The 'Patient Information' section has four rows: 'Date of Birth', 'Patient Account/Control #', 'MBI', and 'SSN'. The 'Request Information' section has one row: 'Due Date'. The 'Patient Account/Control #' row has a checked 'Display' checkbox and a checked 'Required' checkbox, with a red callout '6' pointing to the 'Required' checkbox. At the bottom right, there are three buttons: 'Clone', 'Cancel', and 'Save'. A red callout '7' points to the 'Save' button.

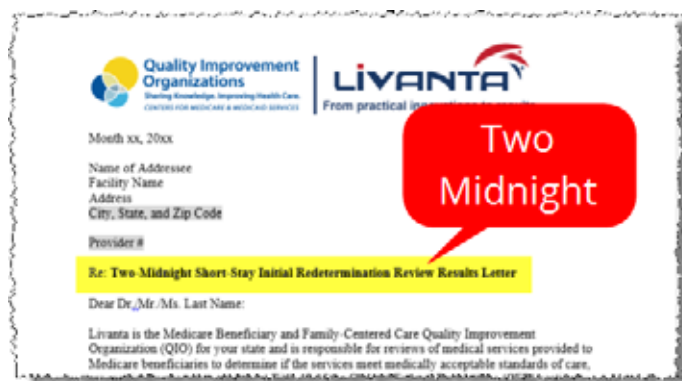
Patient Information	
Date of Birth	<input checked="" type="checkbox"/> <input type="checkbox"/>
Patient Account/Control #	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
MBI	<input checked="" type="checkbox"/> <input type="checkbox"/>
SSN	<input checked="" type="checkbox"/> <input type="checkbox"/> <small>- Select Mask Option -</small>
Gender	<input type="checkbox"/> <input type="checkbox"/>

Request Information	
Due Date	<input checked="" type="checkbox"/> <input type="checkbox"/>

IDENTIFY REQUESTS RELATED TO TWO MIDNIGHT RULE

You can now flag requests that were sent to determine if the patient's care complied with Medicare's **Two-Midnight Rule**. This kind of request is sent from a Quality Improvement Organization (QIO).

The **Two-Midnight** consideration is typically highlighted in the Request Letter, as shown below:



Automatic flagging of Two Midnight Stay Review

IF

Automated Date Extraction finds a reference to the **Two Midnight** rule on the Request Letter;

AND

the **Major Class** of the requester = Peer Review Organization (old name for a QIO);

THEN

the new **Two-Midnight Stay Review** checkbox will be automatically selected when the request is opened for **Logging**.

BUT

You can un-check the field during **Logging** or **Fulfillment** if your review of the Request Letter reveals that it is not appropriate.



Automated Data Extraction may not always find a “trigger” for the **Two Midnight** rule, even though it is listed on the Request Letter.

If this happens, you can still set the **Two-Midnight Stay Review** checkbox manually, as described on the next page.

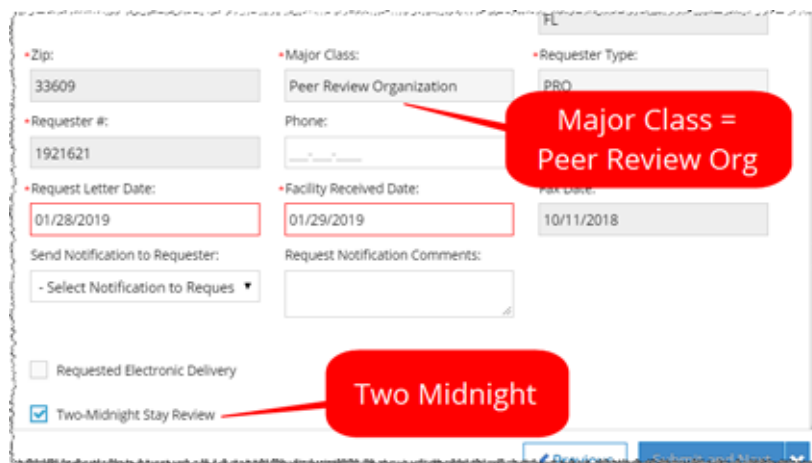
Manually select Two Midnight Stay Review

1. Select a requester with a **Major Class** of Peer Review Organization (old name for a QIO).



The **PRO** option was removed as a separate **Request Type** in **HealthSource Clarity v1.3.2**.

2. Select the **Two-Midnight Stay Review** checkbox.
 - 2.1 You'll find it below the **Requested Electronic Delivery** field.
 - 2.2 The checkbox is not displayed for other kinds of requesters.



The screenshot shows a form with the following fields and values:

- Zip: 33609
- Requester #: 1921621
- Request Letter Date: 01/28/2019
- Major Class: Peer Review Organization
- Phone: [Empty]
- Facility Received Date: 01/29/2019
- Requester Type: PRO
- Fax Date: 10/11/2018
- Send Notification to Requester: - Select Notification to Reques
- Request Notification Comments: [Empty]
- Requested Electronic Delivery:
- Two-Midnight Stay Review:

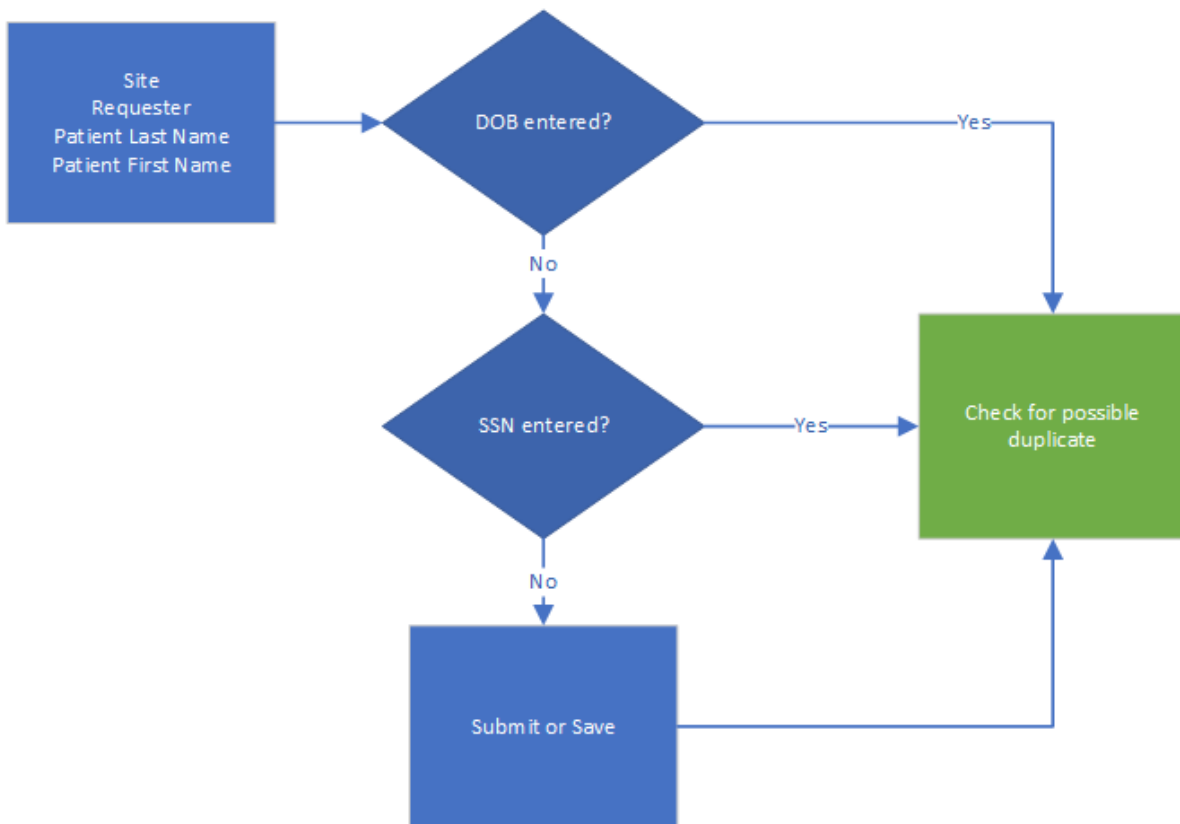
Red callouts highlight the 'Major Class = Peer Review Org' dropdown and the 'Two-Midnight Stay Review' checkbox.

3. Continue logging the request as usual.

IMPROVED DUPLICATE REQUEST DETECTION

HealthSource Clarity now does a better job of finding possible duplicate requests before they are completely logged. The comparison between requests is based on these values:

- Site
- Requester
- Patient Last Name
- Patient First Name
- Patient DOB (if entered)
- Patient SSN (if entered)



90 day window for duplicate checking



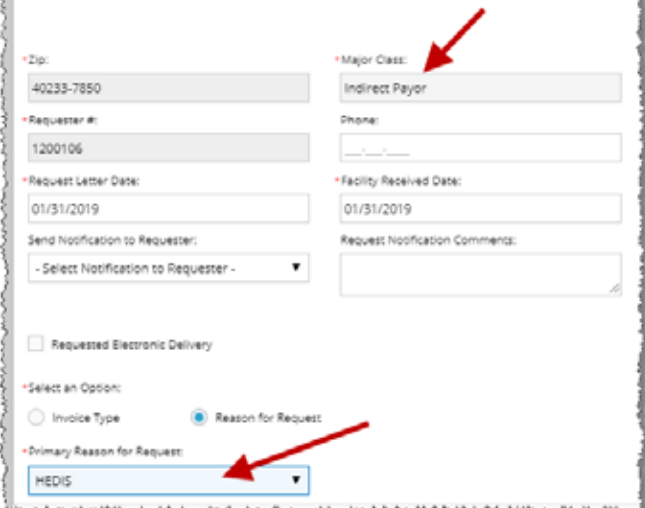
The duplicate checking process looks “back” 90 days for possible matches. It will **NOT** find a possible duplicate request that was entered **MORE** than 90 days earlier, even if all of the criteria match.

SUPPORT FOR HEDIS PULL LISTS

You can now specify HEDIS measures to be tracked for every patient on a HEDIS Pull List.

The specified measures will be displayed during **Fulfillment** to guide the retrieval of the appropriate Medical Records.

1. Open a **Pull List** request for **Logging**.
2. Verify that the request uses these values:

Logging screen	Data Entry Field	Value
	Request Type	Pull List
	Major Class	Indirect Payor
	Reason for Request	HEDIS

3. Click **Continue** on the **Logging** screen.

4. Note the new **Required Measures** column on the **Patient Information** screen:



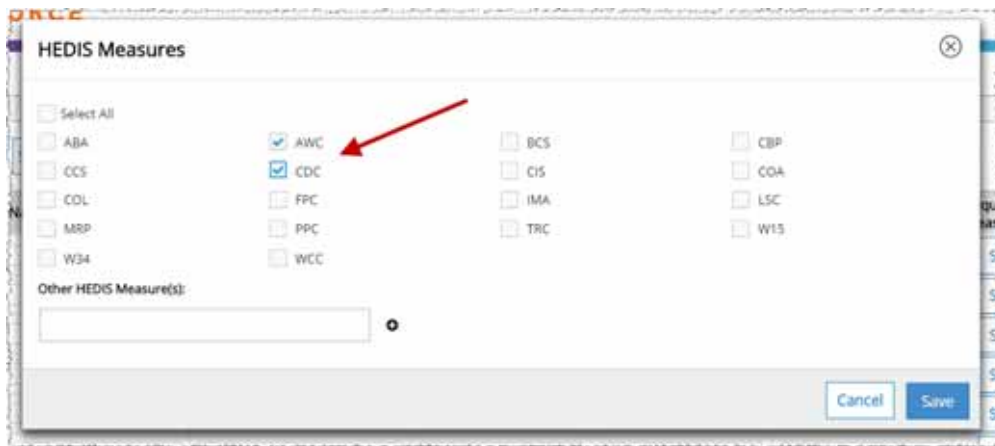
5. For every patient, click the **Select** button in the **Required Measures** column.

6. On the **HEDIS Measures** pop-up, click the appropriate checkbox(es) and click **Save**.

6.1 In the example below, the **AWC** and **CDC** measures are selected.

6.2 Use the **Select All** option to quickly pick every measure.

6.3 If there's no checkbox for a measure, use the **Other HEDIS Measure(s)** field. You can add multiple **Other** measures.



7. When you've submitted all the patients on the Pull List, click **Save and Close** on the **Patient Information** screen.
8. Open one of the "child" requests for **Fulfillment**.
9. Note that the **Medical Information** section lists the HEDIS measures that were specified on the **Patient Information** screen.

Medical Information

Chart Location

EMR Film/Fiche Internal Clinic/Department
 Paper

Medical Records Page Count

Electronic: Paper:
Microfilm: Total Pages:

Requested Measures	Requested
AWC	<input checked="" type="checkbox"/>
CDC	<input checked="" type="checkbox"/>

General Information

CERTIFICATION ALLOWED FOR MORE REQUESTS

Certification means that a representative of Ciox Health or the health care facility has verified that the captured Medical Records match the specifications in the Request Letter.

You can now flag many kinds of requests for **Certification**. Previously, this option was available only for **Attorneys**.

If a request matches one of these combinations, the **Is Certification Required?** checkbox is displayed on the **Data Entry** screen:

Request Type	Requester Type
Standard	Attorney
Standard	Insurance
Standard	Copy — Attorney
Standard	Copy — Insurance
Standard	Copy
Standard	Government (not Disability)
Standard	Facility
BOC	Facility
Patient	Patient
Pull List	Attorney
Pull List	Insurance
Pull List	Copy — Attorney
Pull List	Copy — Insurance
Pull List	Government
Pull List	Facility

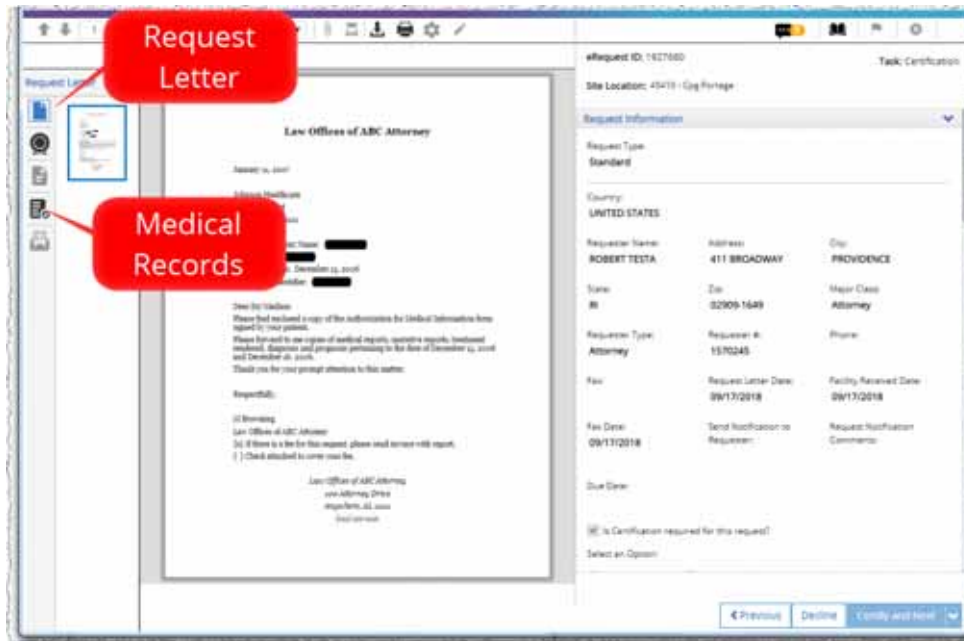
Manually flag a request for Certification

1. Open a request which matches the **Request Type / Requester Class** combinations listed on [page 28](#).
 - 1.1 Typically, the need for **Certification** is set during **Logging**, but it can also be selected during **Fulfillment**.
2. Select the **Is Certification required for this request?** checkbox. You'll find it below the **Requested Electronic Delivery** field.

The screenshot shows a portion of a web form. At the top, there are two date input fields labeled 'mm/dd/yyyy' and a date '01/25/'. Below these are two sections: 'Send Notification to Requester:' with a dropdown menu showing '- Select Notification to Reques', and 'Request Notification Comments:' with a text area. Further down, there are two checkboxes: 'Requested Electronic Delivery' (unchecked) and 'Is Certification Required?' (checked). A red arrow points to the 'Is Certification Required?' checkbox. At the bottom, there is a label 'Select an Option:'.

3. After the request has been submitted from **Fulfillment**, its **Task Type** = Certification. You can use the new **Certification Required Only** filter for the **Request Search** ([page 13](#)) to locate this kind of request.
4. Open the request. Only users with these **Roles** can **Certify** requests:
 - 4.1 **CSR**
 - 4.2 **Internal Manager**
 - 4.3 **External Manager**

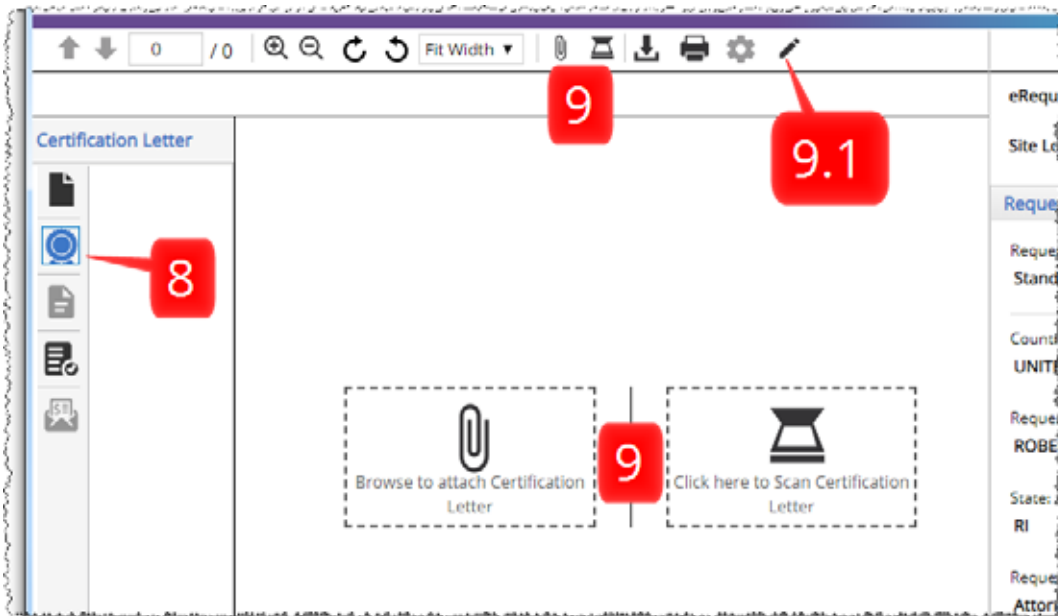
- The request opens in the **Certification** screen. This screen allows you to see the Request Letter and Medical Records and to attach a **Certification Letter**.



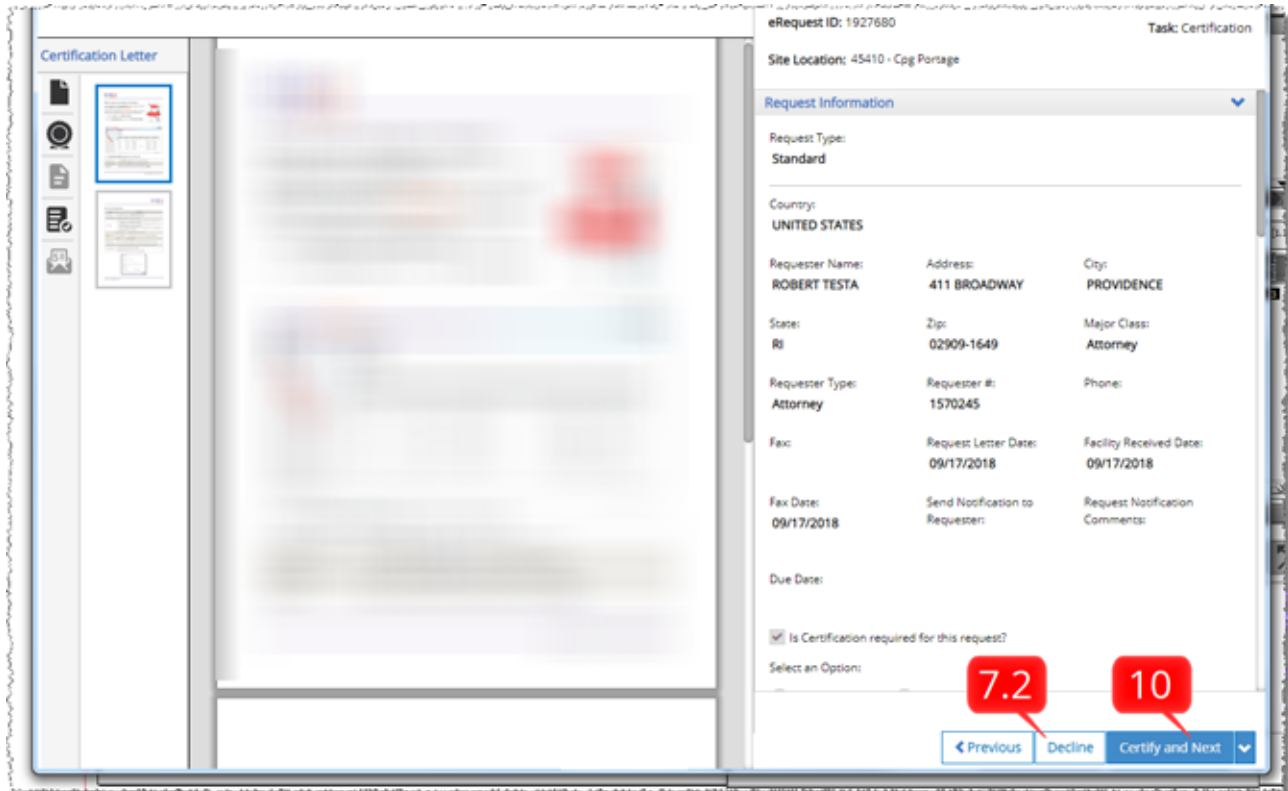
- Review the Request Letter and Medical Records.
- Do the captured Medical Records match the requirements stated in the Request Letter?
 - YES** — Proceed to [Step 8](#).
 - NO** — Click the **Decline** command in the bottom right corner of the **Certification** screen. You are prompted to explain your reason in a **Comment**. See [page 33](#) for information on what happens to a declined request.
- Click the **Certification Letter** symbol.

9. Attach or scan the **Certification Letter**. You can only attach PDF files.

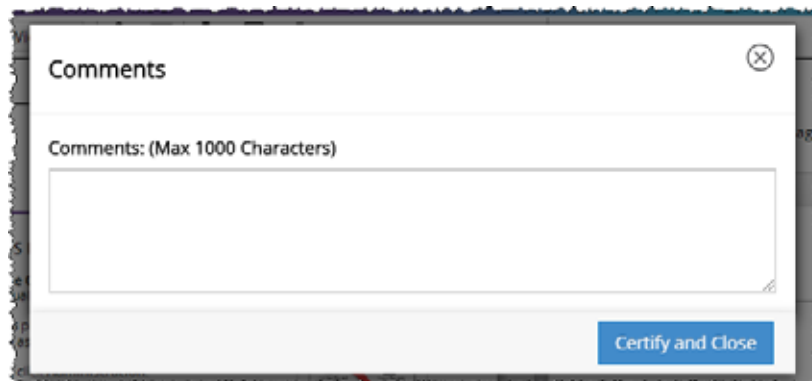
9.1 If needed, use the **Edit** command to delete, add, or rotate pages.



10. Click the **Certify and Next** command at the bottom right of the **Certification** screen.



11. On the **Comments** popup, add any useful information and click the **Certify** button.



12. **HealthSource** sends the request to Ciox Alpharetta for ROI processing (pricing, indexing, invoicing, and delivery).

What if the Medical Records are wrong for a Certification request?

If the Medical Records for a **Certification** request are declined ([Step 7.2 on page 30](#)), then:

1. The request goes back to **Fulfillment** (the **Task Type** = Fulfillment).
2. The next **CSR** who opens the request is prompted to:

Edit	<p>Opens the request.</p> <p>Retains the Medical Records that have already been attached.</p> <p>You can add more pages and delete existing pages as needed.</p>
Delete	<p>Opens the request.</p> <p>Strips all attached Medical Records from the request.</p>
Cancel	<p>Closes the request.</p> <p>Makes no changes to the attached Medical Records.</p>

