HealthSource Clarity

v1.4 Release Notes

February 2019

Document History

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Contact Information

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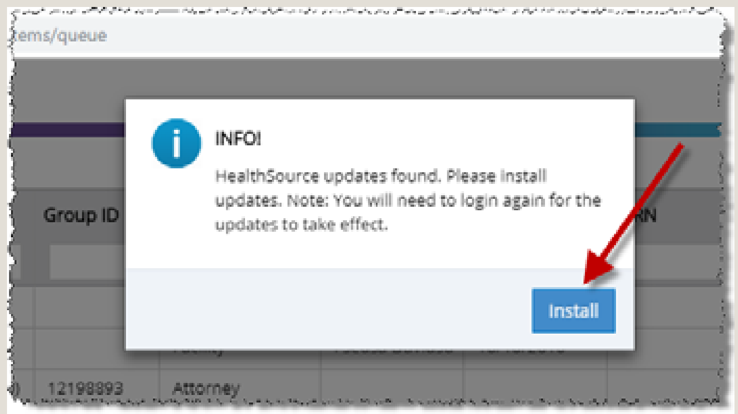
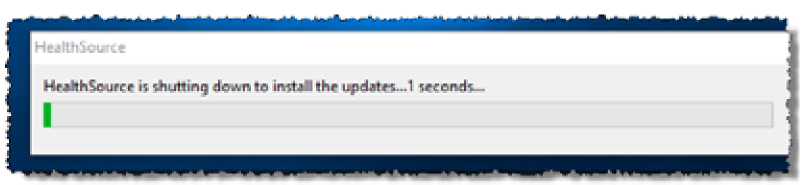
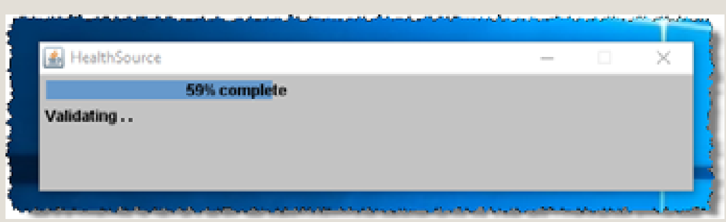
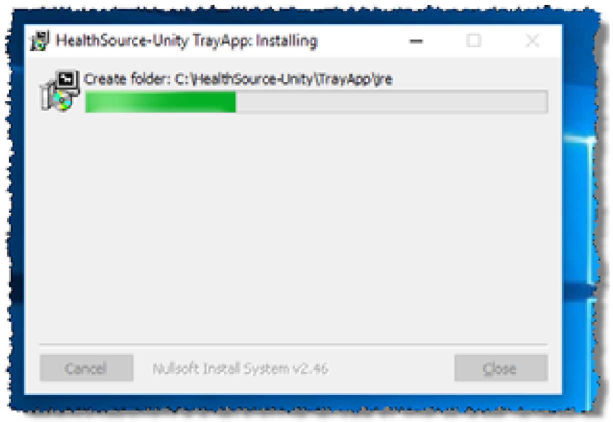
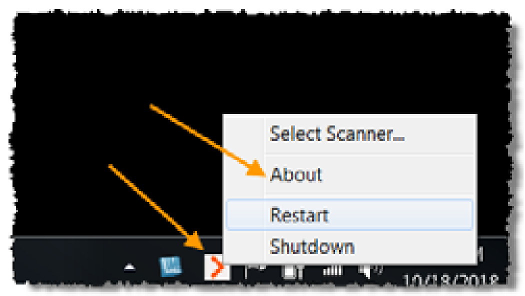
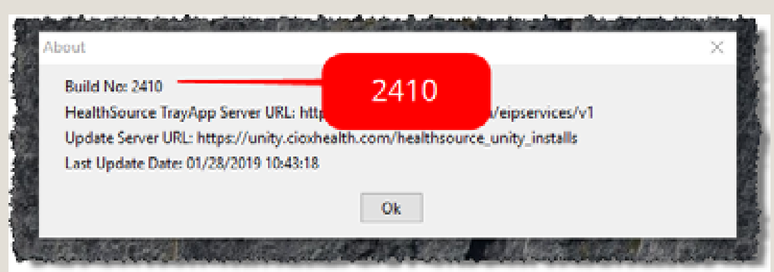
HealthSource Clarity v1.4 Release Notes

TRAYAPP UPDATE REQUIRED

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

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

<table>
<tr><td>The TrayApp update installs itself.</td><td>
</td></tr>
<tr><td>The updated TrayApp starts itself.</td><td>
</td></tr>
<tr><td>Right-click the TrayApp in your Windows Tray and select About.</td><td>
</td></tr>
<tr><td>Does the Build No = 2410 ?</td><td rowspan="3">
</td></tr>
<tr><td>• YES — Click OK.</td></tr>
<tr><td>• NO — Contact Customer Care at 877-358-6939.</td></tr>
</table>

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?

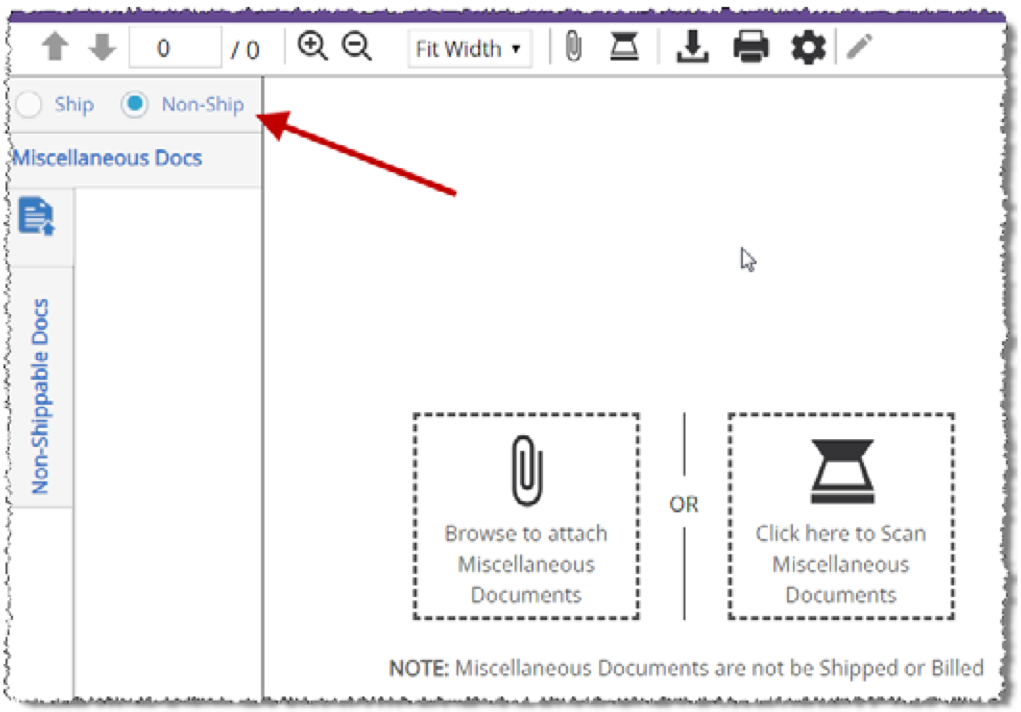
Yes, **Miscellaneous Documents** can be viewed by other **HealthSource Clarity** users.

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

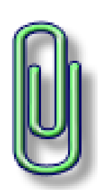
Attach a Miscellaneous Document

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.

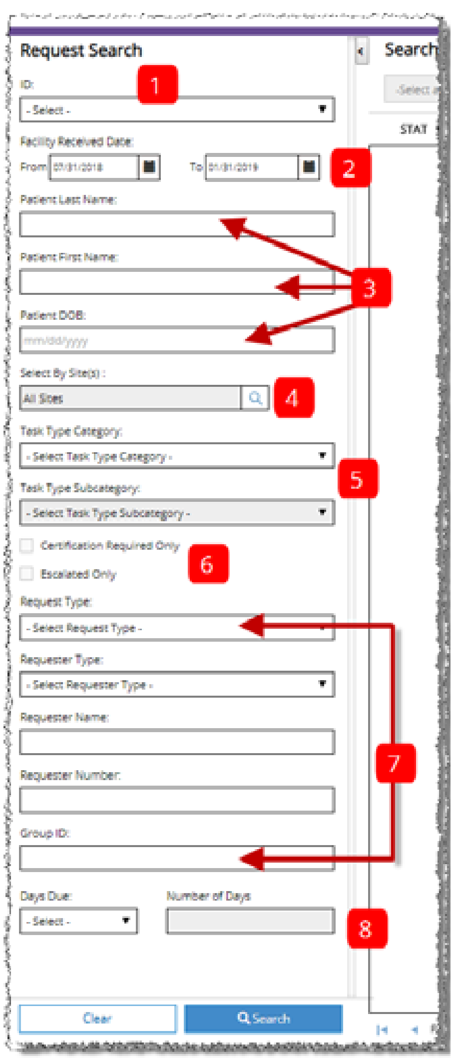
	You can attach these file types: • PDF • JPG • TIF

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.



1	Search by a specific request identification value: • eRequest ID • Log ID • Invoice
2	Find requests in a specific date range.
3	Search by patient identification values.
4	Search requests at a specific site or sites.
5	Search by the current status of the request.
6	**NEW** options that limit the **Search Results** to include: • Requests that require **Certification**; • Requests that have been **Escalated**. **Escalation** is an optional site-level setting. See page 11 for more information on using these options.
7	Search by requester identification values.
8	Search by **Due Date** / how many days a request is overdue.

Search results limits

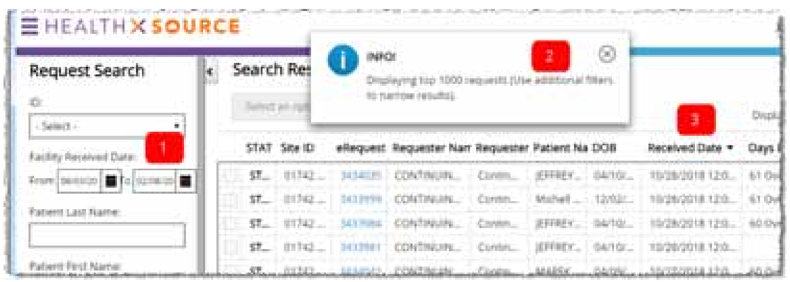
The **Request Search** is now limited to the oldest 1,000 requests that meet your search criteria. The age of the requests is measured by the **Received Date**.

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.

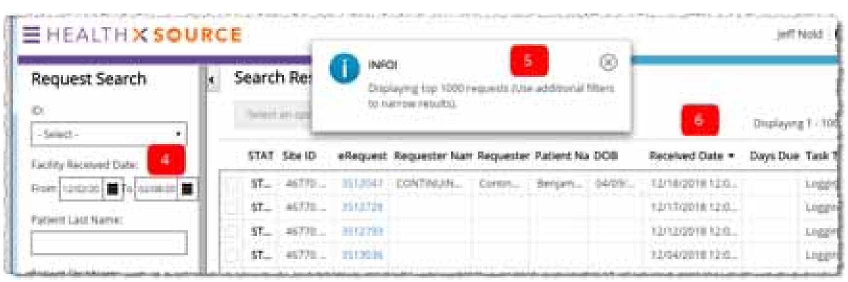
3. Sort by **Received Date**. Note that the newest request was received on 10/28/ 2018.



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.



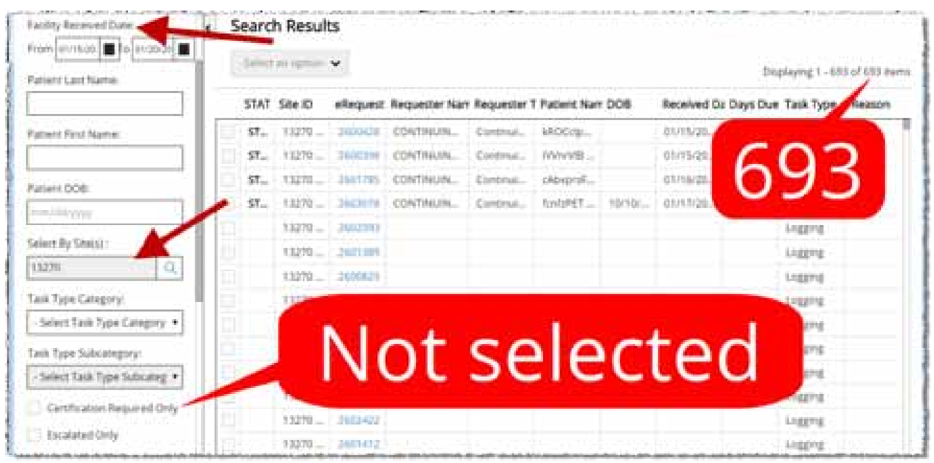
Certification and Escalation checkboxes

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**.

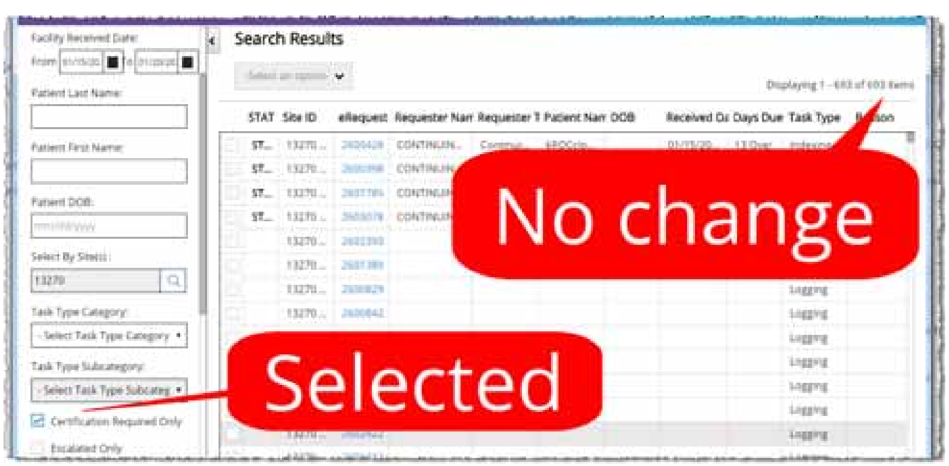
For example:

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.

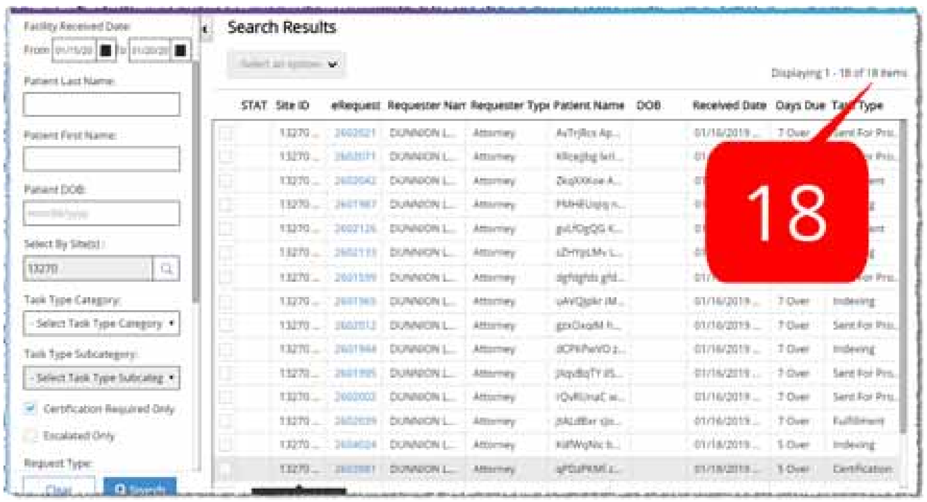


3. If you simply select **Certification Required Only**, the **Search Results** do **NOT** change.



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**.



Looking for requests in the Certification workflow?

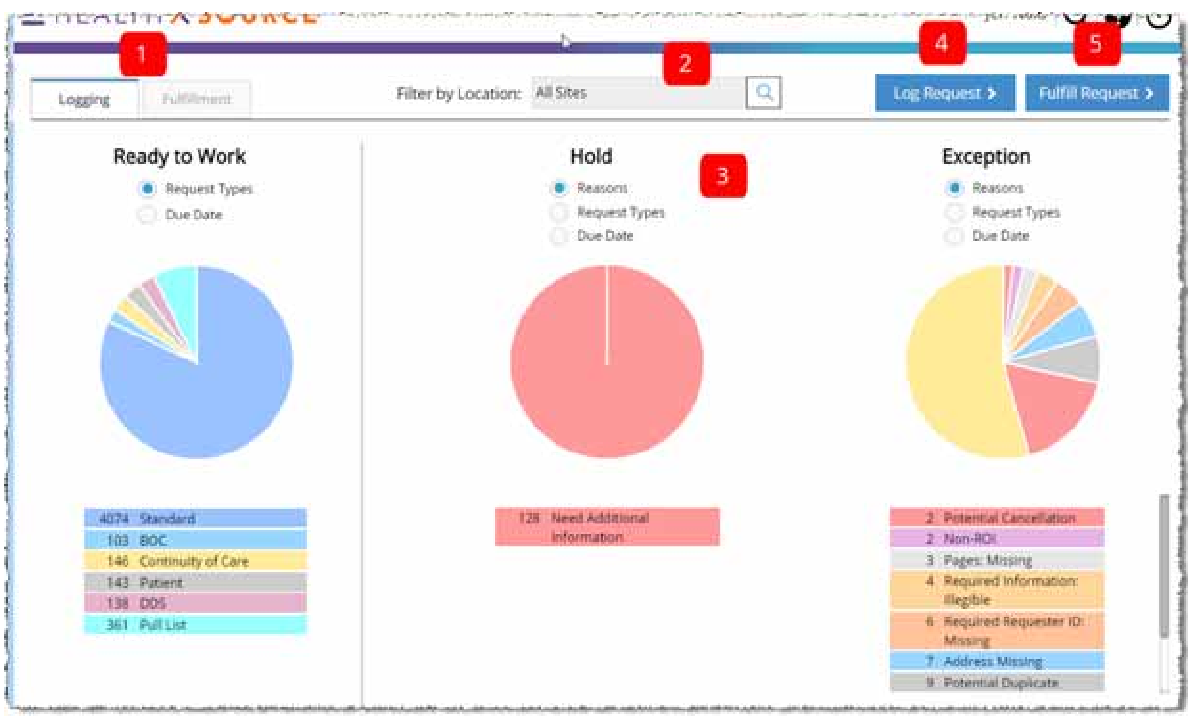
Use the **Task Type Category** and **Task Type Subcategory** search options in combination with the **Certification Required Only** checkbox to find specific kinds of requests:

Task Type		Finds this kind of request
Category	**Subcategory**	
Logging	Any	**Certification** was manually selected during **Logging**; **AND** Has not yet been submitted for **Fulfillment**. **AND** Matches the **Task Type Subcategory**, if any.
Fulfillment	Any	**Certification** was enabled when the request was submitted from **Logging**. **OR** **Certification** was enabled during **Fulfillment**. **AND** Has not yet been submitted from **Fulfillment**. **AND** Matches the **Task Type Subcategory**, if any.
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 Logging.
5	Fetches the next available request with a **Task Type** of Fulfillment, Approval for Fulfillment, or Approval for Delivery. The **Approval** workflow is optional and configured on a site-by-site basis.

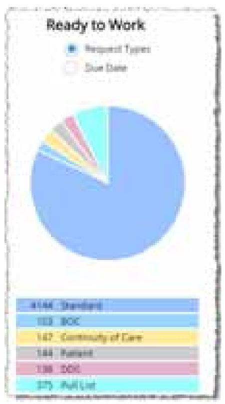
Dashboard pie charts

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

<table>
<tr>
<td>

Ready to Work

Requests that can be logged or fulfilled immediately.

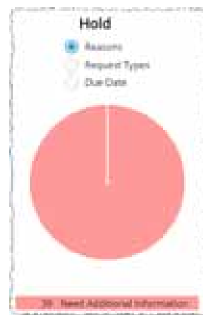


Can be organized by **Request Type** or **Due Date**.

</td>
<td>

Hold

- **CSR** = requests that **YOU** put **On Hold**.
- **Logger Centralized Supervisor** = requests put **On Hold** by **Centralized Loggers**.

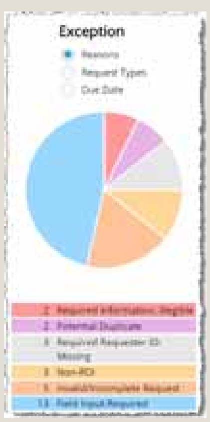


Can be organized by **Reason**, **Request Type**, or **Due Date**.

</td>
</tr>
<tr>
<td>

Exception

Requests currently flagged as **Exceptions**.



Can be organized by **Reason**, **Request Type**, or **Due Date**.

</td>
<td>

Pending (Fulfillment tab only)

Requests currently **Pended**.

Can be organized by **Reason**, **Request Type**, or **Due Date**.

</td>
</tr>
</table>

View request details

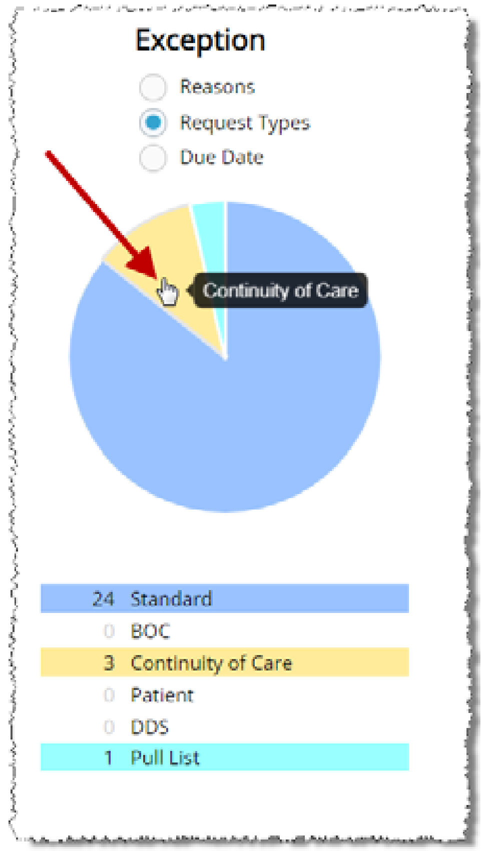
To see more information about the requests captured in a chart:

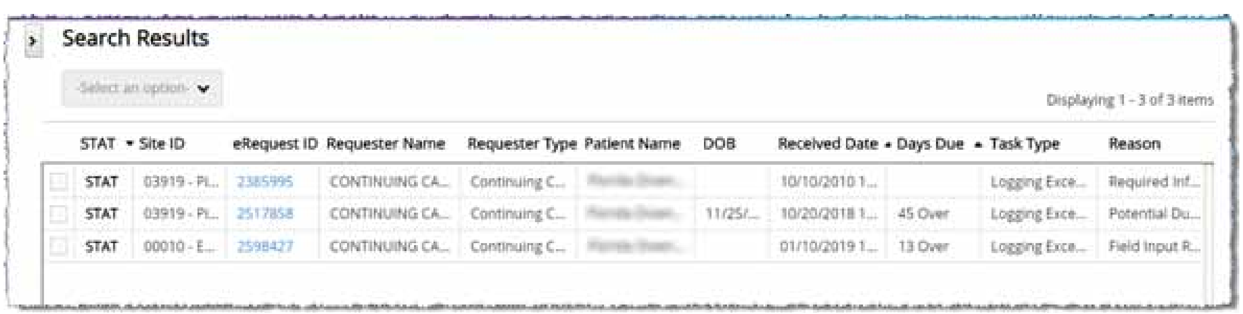
1. Click the appropriate “pie slice.” In the example to the right, we’ve clicked **Continuity of Care** in the **Exceptions** chart, which is organized by **Request Types**.

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

3. Review the request details.

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





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.

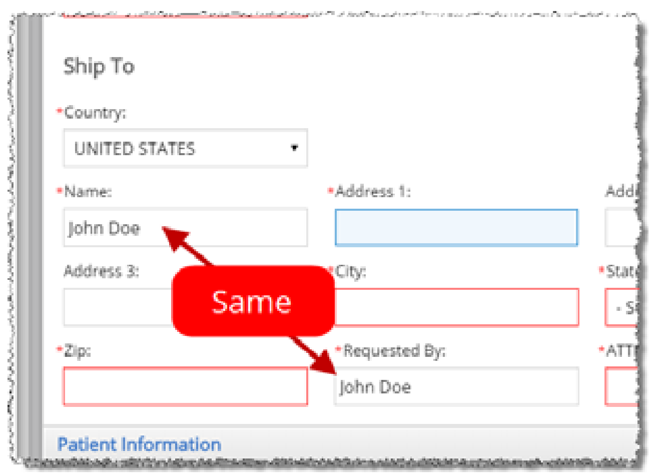
How we determine the **Requested By** entry depends on the **Request Type**:

<table>
<tr><th>Standard, BOC, Patient, DDS, Pull List, Audit</th><th>Continuity of Care</th></tr>
<tr><td>

Requested By automatically filled with **Requester Name** value.

</td><td>

Requested By automatically filled with **Name** value in **Ship To** section.



</td></tr>
</table>

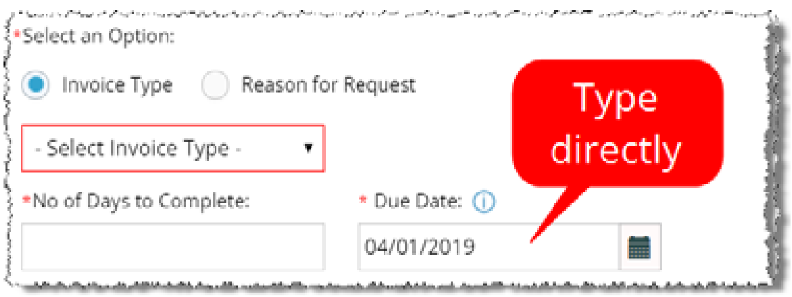
Changes to Due Dates

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**.

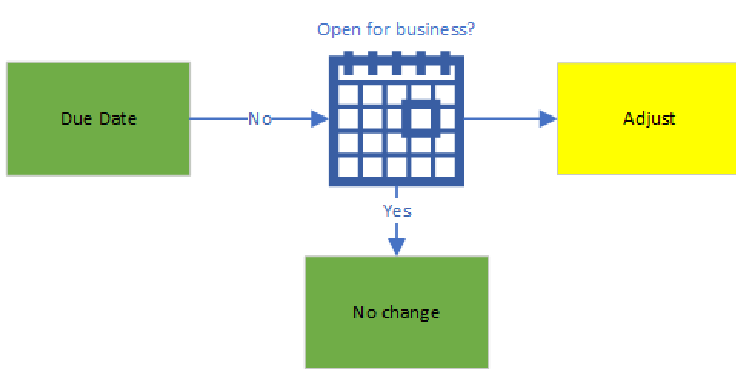
If you enter the **Due Date**, the **No of Days to Complete** field is **NOT** editable.



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).



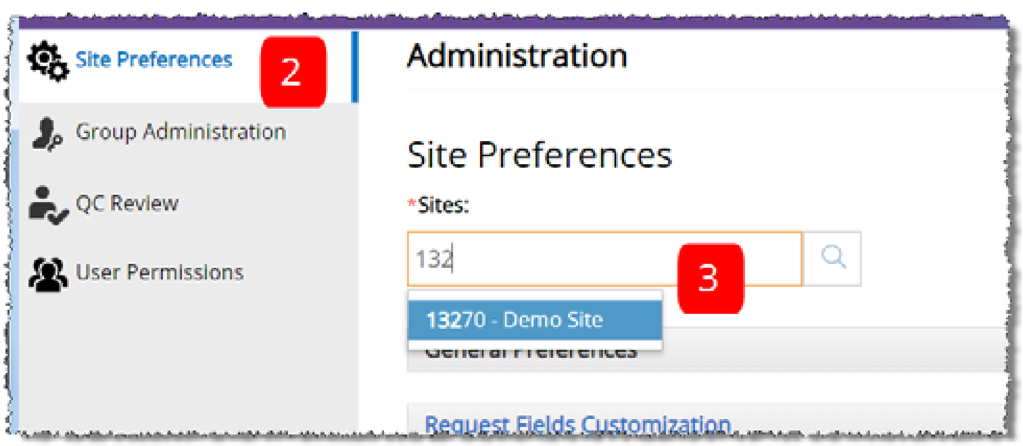
MAKE ACCOUNT NUMBER A REQUIRED FIELD FOR SPECIFIC SITES

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.

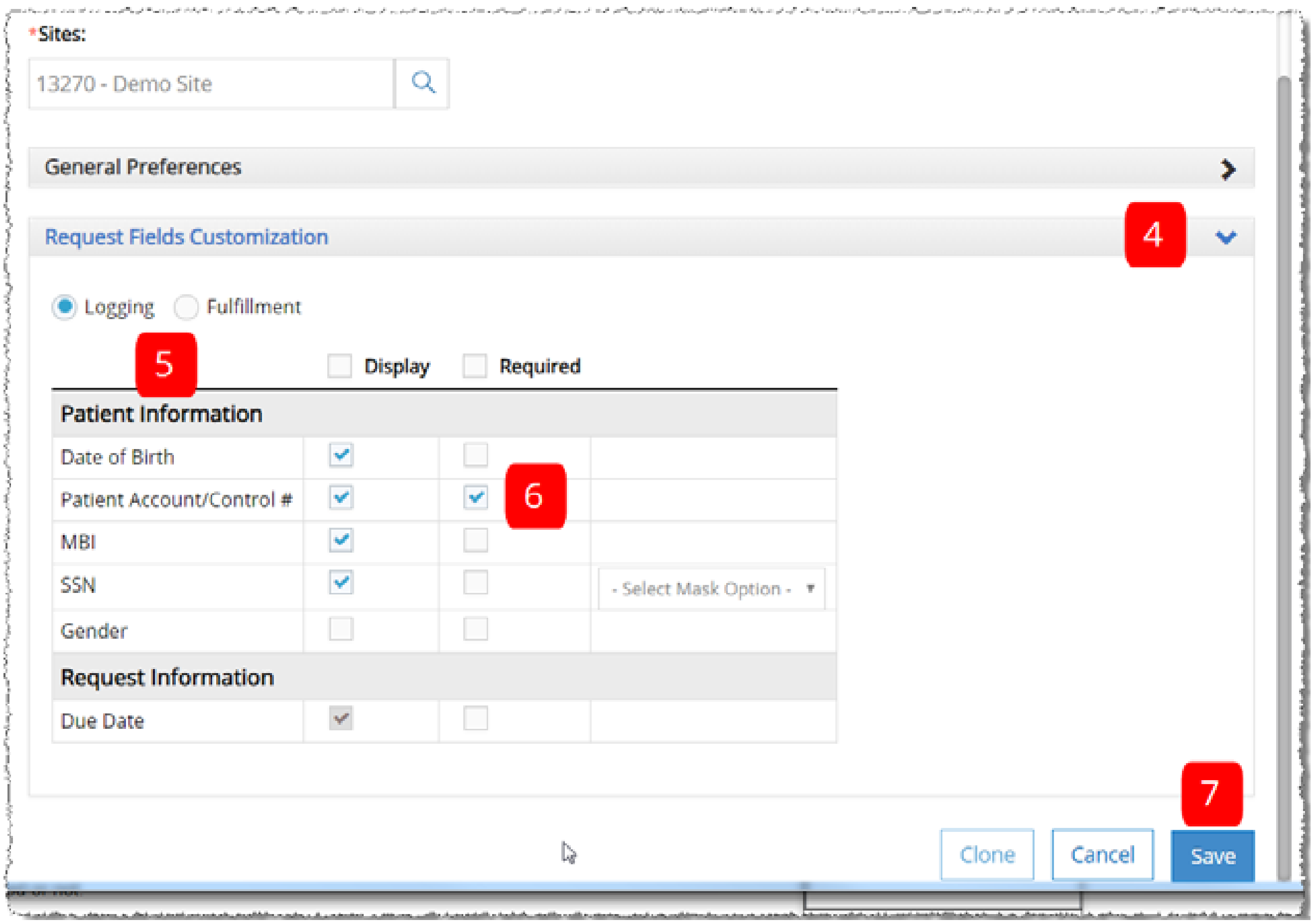
5. Decide if you want the **Patient Account / Control #** field to be required on the **Logging** or **Fulfillment** screens.

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.

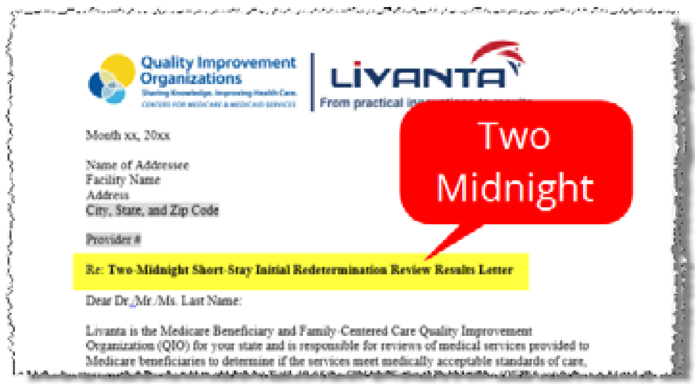
7. **Save** the **Site Preferences**.



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

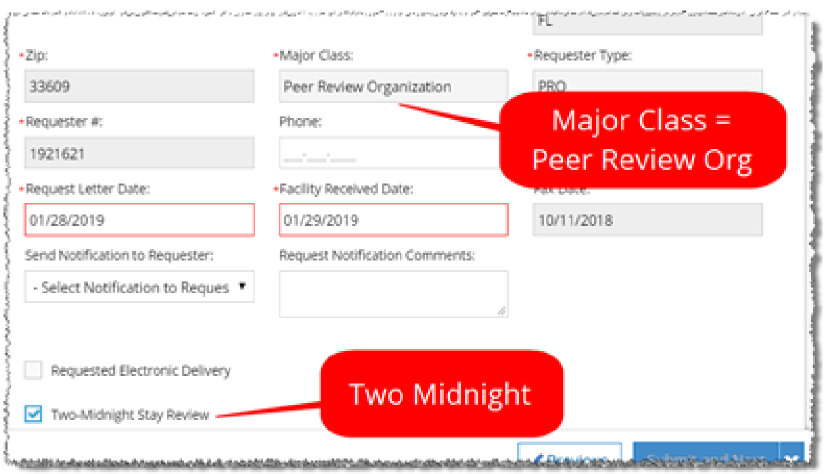
1. Select a requester with a **Major Class** of Peer Review Organization (old name for a QIO).

> 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.

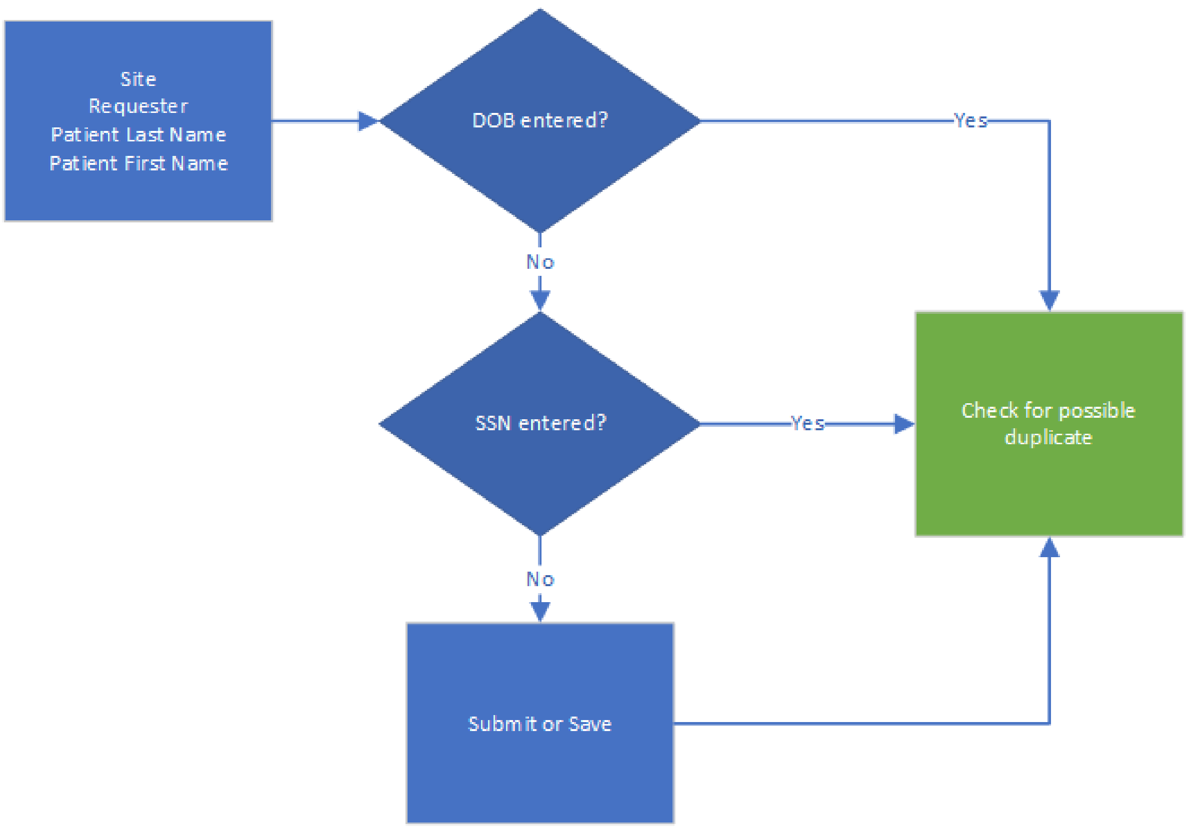


3. Continue logging the request as usual.

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.

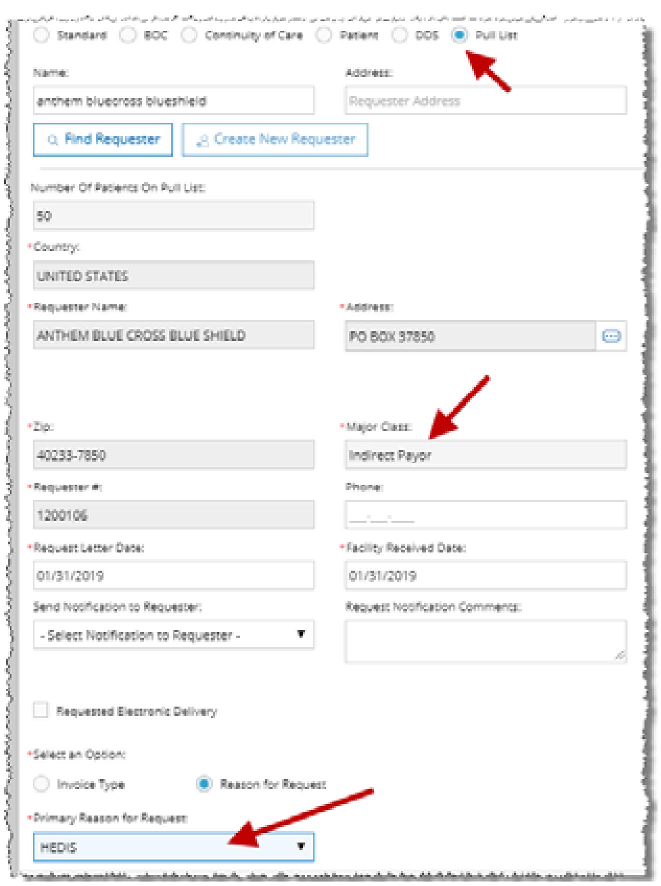
SUPPORT FOR HEDIS PULL LISTS

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:

<table>
<tr><th>Logging screen</th><th>Data Entry Field</th><th>Value</th></tr>
<tr><td rowspan="3">
</td><td>Request Type</td><td>Pull List</td></tr>
<tr><td>Major Class</td><td>Indirect Payor</td></tr>
<tr><td>Reason for Request</td><td>HEDIS</td></tr>
</table>

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.

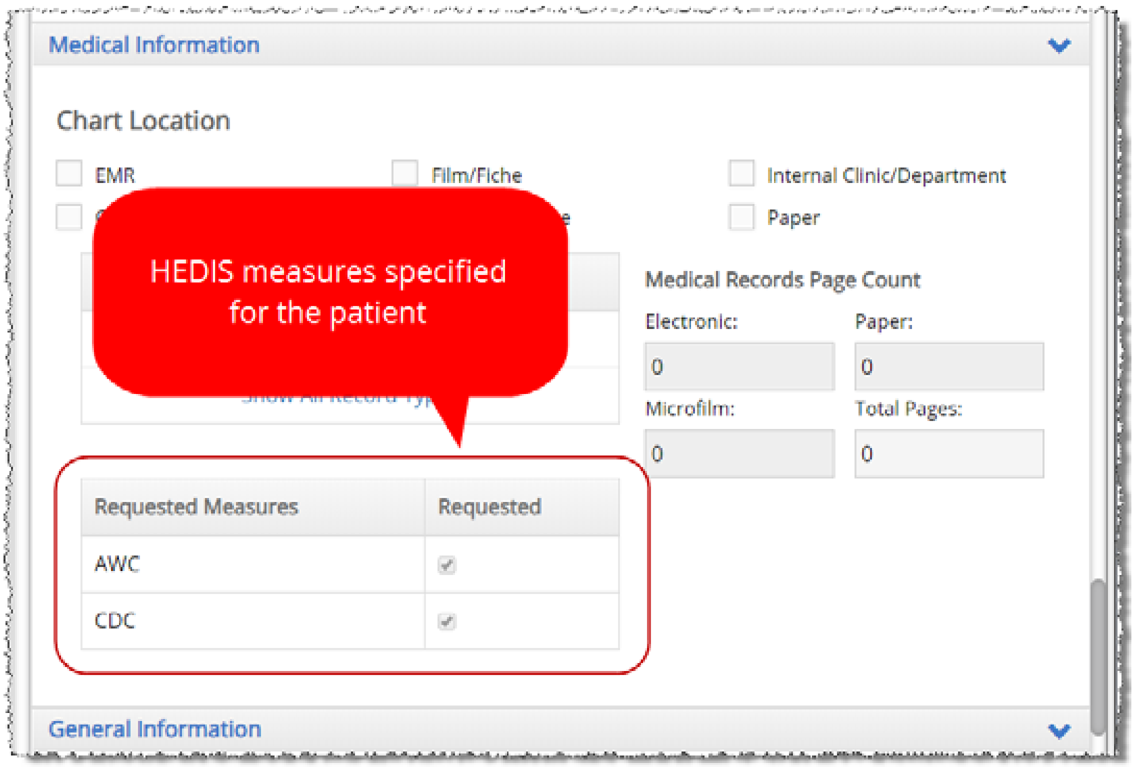
   6.2 Use the **Select All** option to quickly pick every measure.

   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.



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:

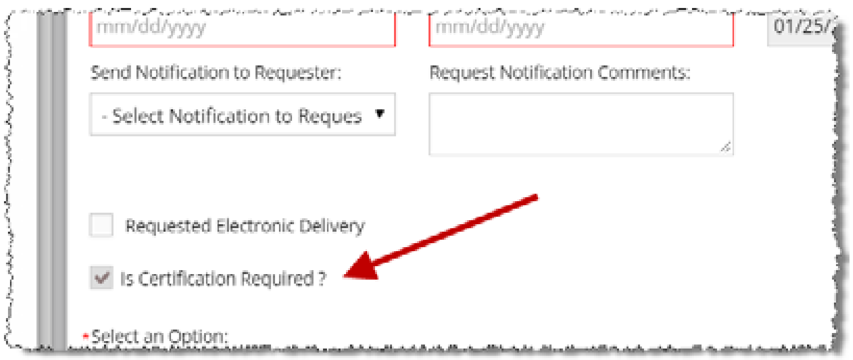
Request Type	Requester Type
Standard	Attorney
Standard	Insurance
Standard	Copy — Attorney
Standard	Copy — Insurance
Standard	Copy
Standard	Government (not Disability)
Standard	Facility
BOC	Facility
Patient	Patient
Pull List	Attorney
Pull List	Insurance
Pull List	Copy — Attorney
Pull List	Copy — Insurance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



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.

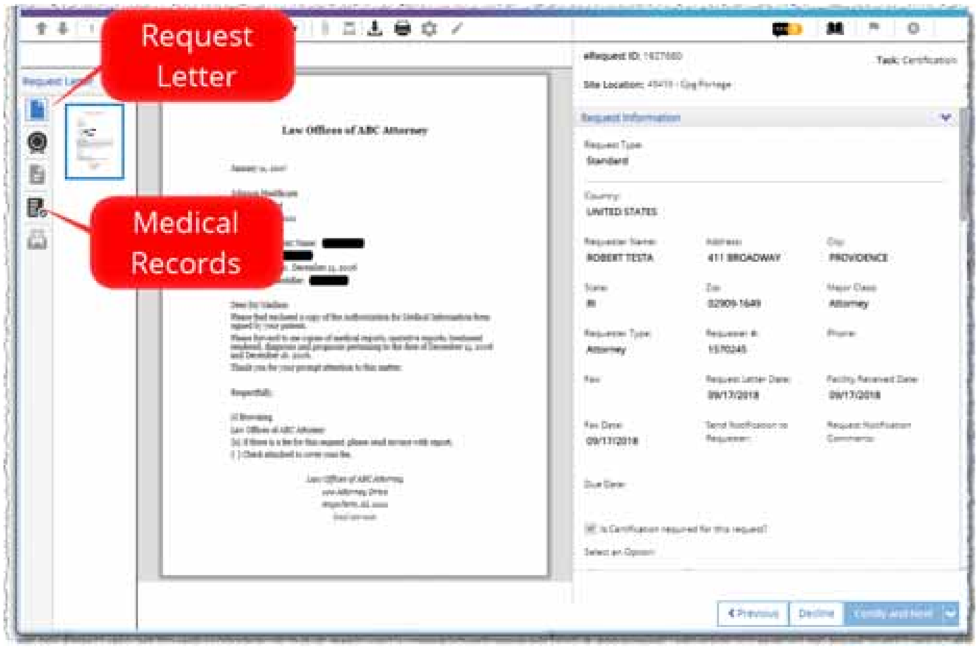
4. Open the request. Only users with these **Roles** can **Certify** requests:

   4.1 **CSR**

   4.2 **Internal Manager**

   4.3 **External Manager**

5. 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**.



6. Review the Request Letter and Medical Records.

7. Do the captured Medical Records match the requirements stated in the Request Letter?

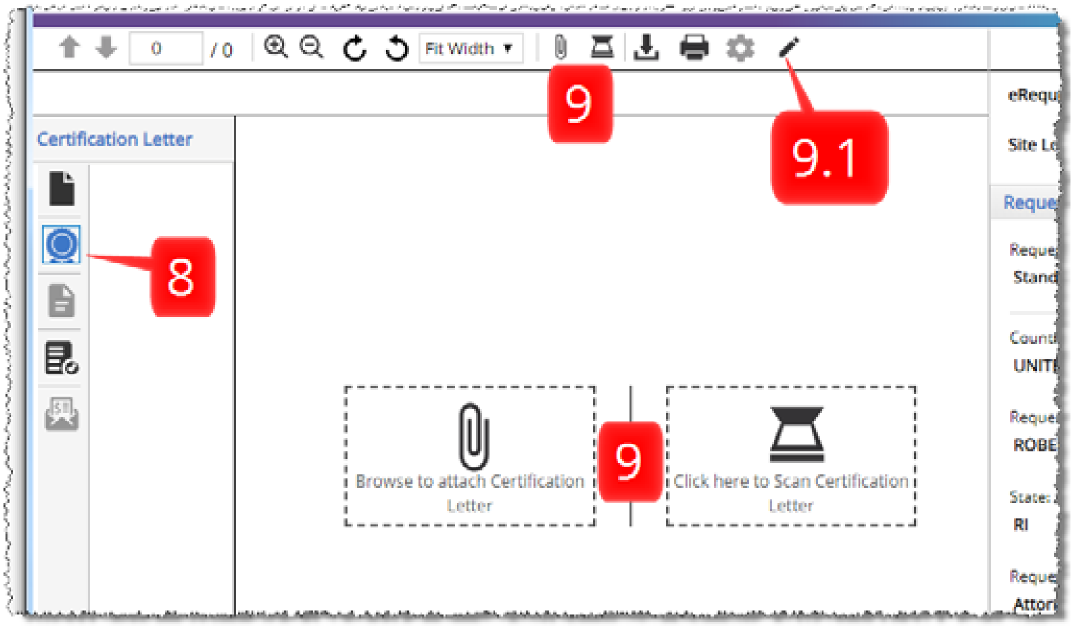
   7.1 **YES** — Proceed to Step 8.

   7.2 **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.

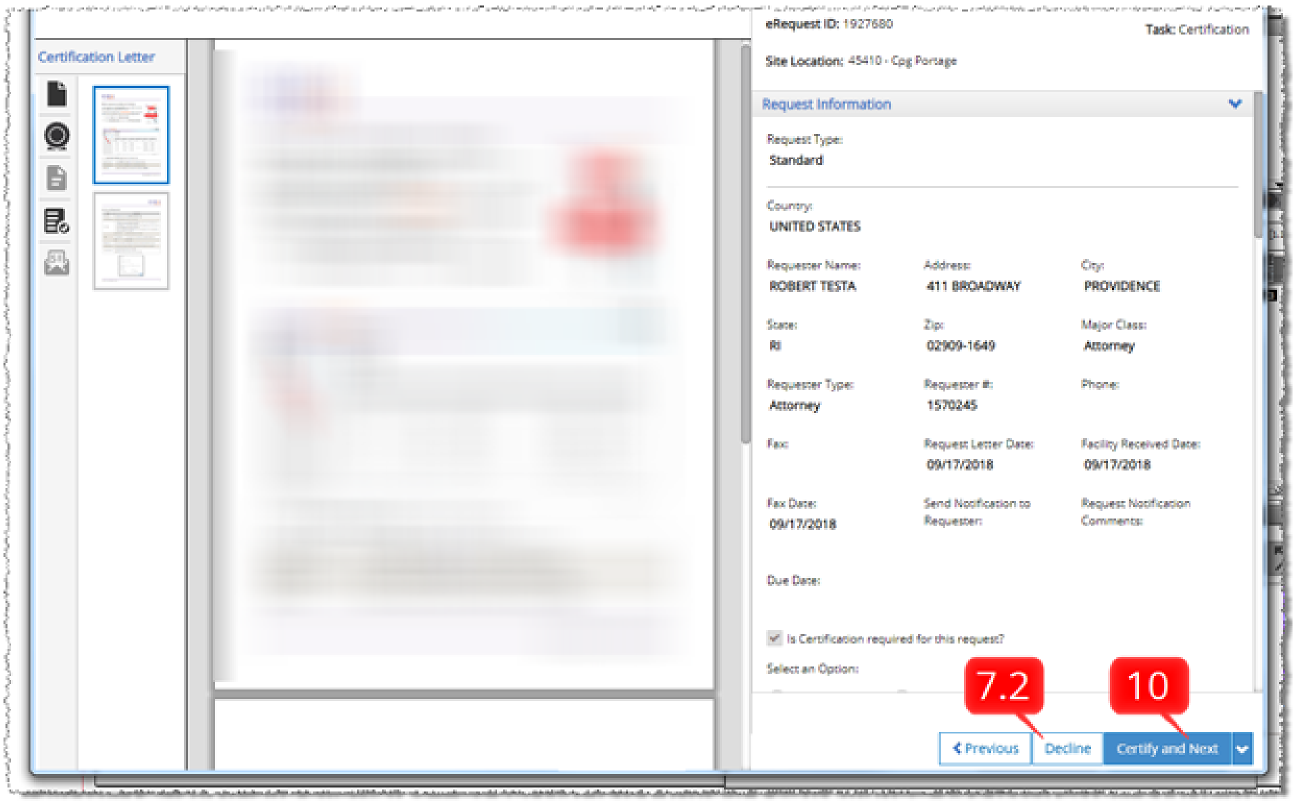
8. Click the **Certification Letter** symbol.

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

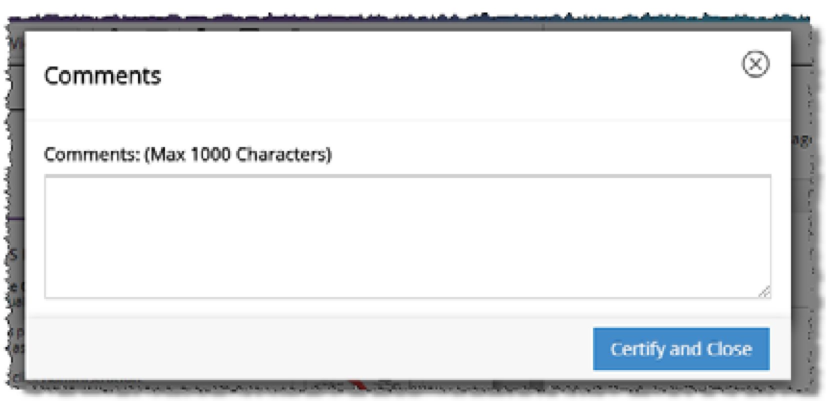
   9.1 If needed, use the **Edit** command to delete, add, or rotate pages.



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