



# **HealthSource Clarity**

## **v1.5.2 Release Notes**

September 2019

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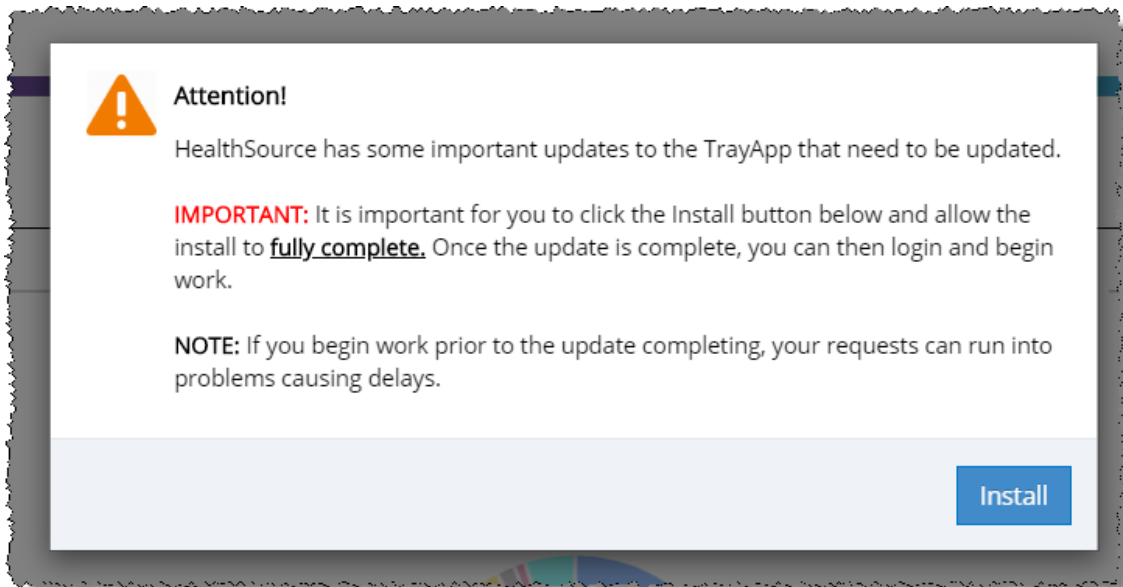
## HealthSource Clarity v1.5.2 Release Notes

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## TRAYAPP UPDATE REQUIRED

To use **HealthSource Clarity v1.5.2**, you **MUST** update the **TrayApp**.

The update process is no longer optional. You will not be able to do any work in **HealthSource Clarity** until the update is complete.



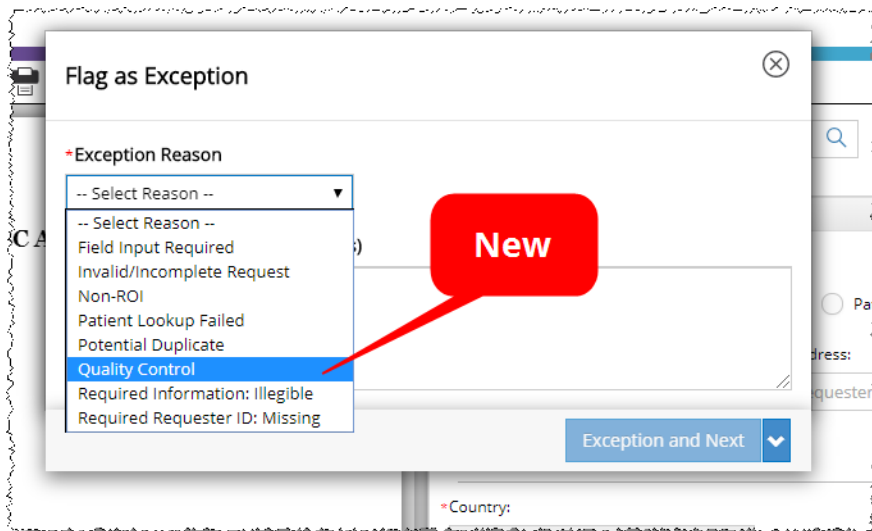
## CHANGES TO PAGE AVAILABILITY BY USER ROLE

We've changed which users can see the **My Dashboard** and **My Holds** pages. We've also changed the landing page for two user roles — the page that appears automatically after you log in.

User Role	My Dashboard	My Holds	Landing Page
Account Management	Yes	Yes	Request Search
Business Office	No	Yes	Request Search
Ciox Executive	Yes	Yes	Request Search
Client Service Representative	Yes <sup>1</sup>	Yes	My Dashboard
Customer Service	No	No <sup>2</sup>	Request Search
External Management	Yes	No <sup>2</sup>	Request Search
External Operations	Yes	Yes	My Dashboard <sup>3</sup>
Group Administrator	Yes	Yes	Request Search
Internal Management	Yes	Yes	Request Search
Internal Operations	Yes	Yes	My Dashboard <sup>3</sup>
Logger Centralized	Yes <sup>1</sup>	Yes	My Dashboard
Logger Centralized Supervisor	Yes <sup>1</sup>	Yes	My Dashboard
New Requester	Yes	Yes	Request Search
<b>NOTES</b>			
<sup>1</sup> could see <b>My Dashboard</b> previously. No change for these users in <b>v1.5.2</b> .			
<sup>2</sup> these users can still look for held requests using the <b>Request Search</b> tool.			
<sup>3</sup> formerly landed on <b>Request Search</b> .			

## NEW EXCEPTION REASON — QUALITY CONTROL

You can now select Quality Control as an **Exception Reason** during **Logging**.



The new reason was added primarily to support the Centralized Logging teams, but it is available at all sites. Check with your supervisor before using this reason.

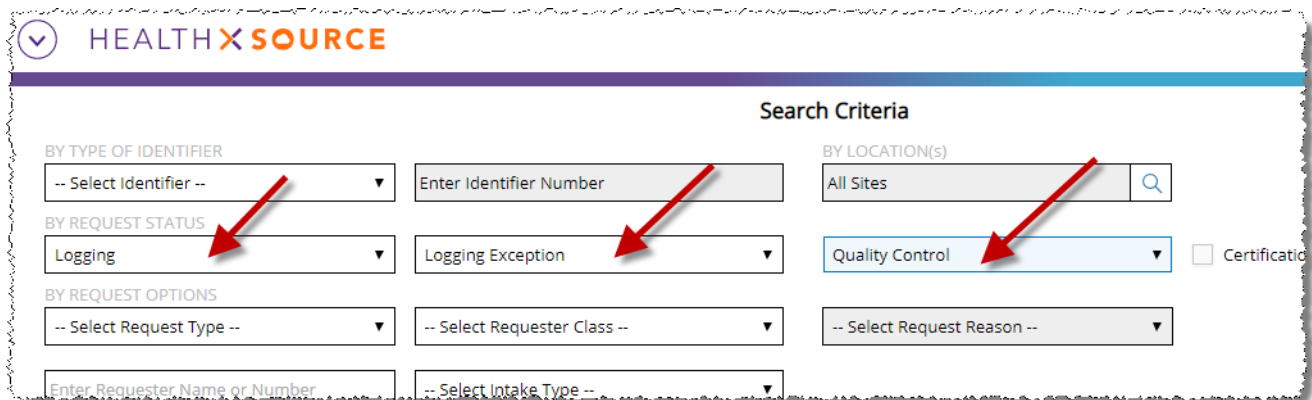
### Not available during Fulfillment

You **CANNOT** select Quality Control as the **Exception Reason** during **Fulfillment**.

## Search for Quality Control exceptions

You can search for requests that match these conditions:

Request Milestone	Logging
Request Status	Logging Exception
Reason	Quality Control



**HEALTHSOURCE**

**Search Criteria**

BY TYPE OF IDENTIFIER  
 -- Select Identifier -- Enter Identifier Number BY LOCATION(s)  
 All Sites

BY REQUEST STATUS  
 Logging Logging Exception Quality Control  Certification

BY REQUEST OPTIONS  
 -- Select Request Type -- -- Select Requester Class -- -- Select Request Reason --

Enter Requester Name or Number -- Select Intake Type --

## BETTER AUTOMATIC IDENTIFICATION OF HIGH VOLUME REQUESTERS

In **v1.5**, we gave **HealthSource Clarity** the ability to automatically detect specific customers, like Disability (DDS) offices and Humana, who submit large numbers of requests.

If the Request Letter provides enough information to identify the requester with certainty, we pre-fill the requester data entry fields and mark the requester as approved:

\*Site Location: 11886 - Charleston Pain Man   Request Status: Ready to Log

eRequest ID: 2808999

**Request Information**

Request Type:

Standard  BOC  Continuity of Care  Patient  DDS

**Approved**  **Requester Name and Address**  
Certified by Ciox Requester Support

\*Country:  
UNITED STATES

\*Requester Name: HUMANA \*Address: PO BOX 14465 \*City: LEXINGTON

\*State: KY \*Zip: 40512 \*Major Class: Indirect Payor

\*Requester Type: PAYI \*Requester #: 1584851 Phone:

**v1.5.2** improves and extends this process:

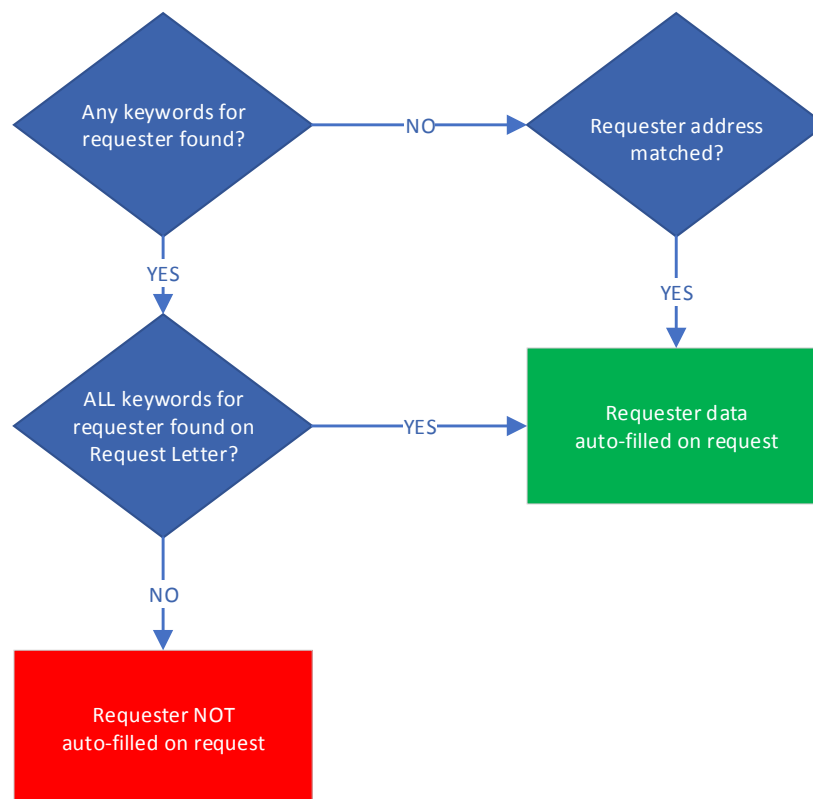
- Address and keyword matching
- Detect city names with multiple words
- How do you know if a requester was automatically assigned?



## Address and keyword matching

This change does **NOT** apply to DDS requests, which are still identified using the bar code on the Request Letter.

Each high-volume requester is associated with a specific set of keywords and address values. We compare the information found on a Request Letter with these rules to decide if the requester data can be auto-filled:

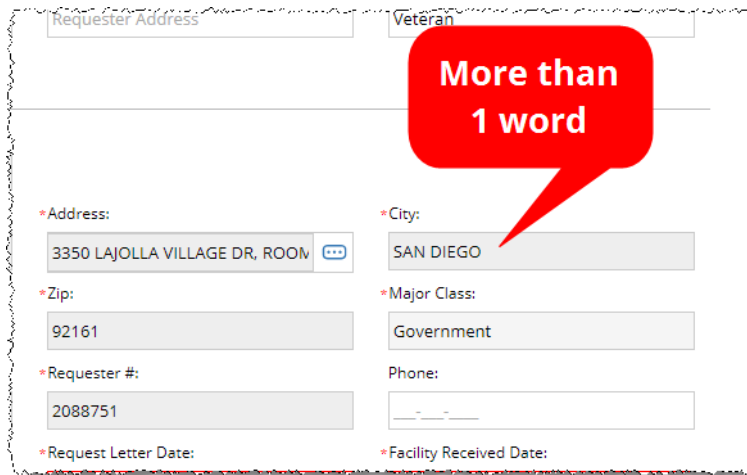


Previously, we auto-filled the requester information if **ANY** of the keywords was found. Now, we fill only if we find **ALL** of the keywords.

## Detect city names with multiple words

This change does **NOT** apply to **DDS** requests, which are still identified using the bar code on the Request Letter.

The high-volume requester detection process can now accommodate addresses for which the city contains two words, such as San Diego.



The image shows a screenshot of a web form for requesting services. A red callout bubble with the text "More than 1 word" points to the "City" field, which contains "SAN DIEGO". The form includes the following fields:

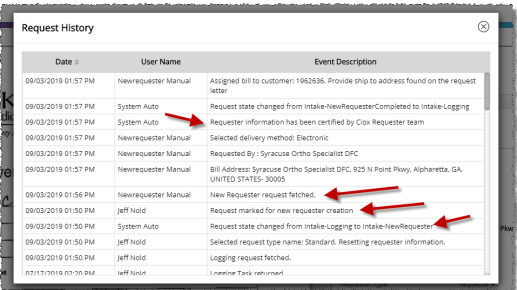
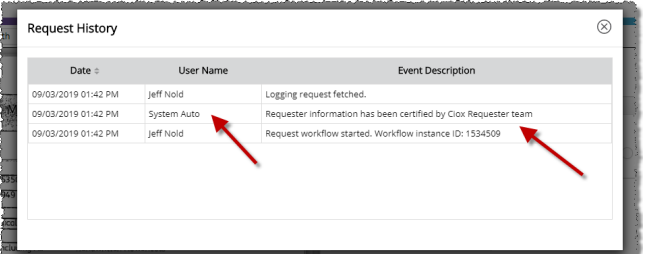
Requester Address	Veteran
* Address:	* City:
3350 LAJOLLA VILLAGE DR, ROOM	SAN DIEGO
* Zip:	* Major Class:
92161	Government
* Requester #:	Phone:
2088751	__-__-__
* Request Letter Date:	* Facility Received Date:

Previously, the high volume requester process did not always match addresses in these cities, which resulted in more manual logging work.

## How do you know if a requester was automatically assigned?

At first glance, it might be hard to tell whether a requester was manually selected by the **New Requester** team or was automatically assigned. In either case, the **Request** page shows the **Approved** flag ([page 8](#)).

The **Request History** is the easiest way to tell how the requester was assigned:

Manually assigned by New Requester team	Automatically assigned
Request state changed from Intake-Logging to Intake - NewRequester	Requester information has been certified by Ciox Requester team
Request marked for new requester creation	
New Requester request fetched	
Requester information has been certified by Ciox Requester team	
 <p>The screenshot shows a 'Request History' table with columns for Date, User Name, and Event Description. Red arrows point to the following events: 'Request state changed from Intake-Logging to Intake-NewRequesterCompleted to Intake-Logging' (System Auto), 'Requester information has been certified by Ciox Requester team' (System Auto), 'Request marked for new requester creation' (Jeff Noid), and 'Selected request type name: Standard. Resetting requester information.' (Jeff Noid).</p>	 <p>The screenshot shows a 'Request History' table with columns for Date, User Name, and Event Description. Red arrows point to the following events: 'Requester information has been certified by Ciox Requester team' (System Auto) and 'Request workflow started. Workflow instance ID: 1534509' (Jeff Noid).</p>

## SEARCH FOR INDIRECT CHASE REQUESTS

Each request created through the **Indirect Chase** tool has a **Unique\_Chase\_ID1** value.

K	L	N	C	P	Q	R
NAME	REQ_FACILITY_ADDR1	REQ_FACILITY	REQ_FACILITY_ZIP	UNIQUE_CHASE_ID1		ID2
GROUP	844 Kempsville Rd	Norfolk	23502	G896396691		
GROUP	844 Kempsville Rd	Norfolk	23502	G896396671		
GROUP	844 Kempsville Rd	Norfolk	23502	G896100344		
GROUP	844 Kempsville Rd	Norfolk	23502	G896396630		

**Unique Chase ID**

You can now search for a specific request using this value. Only **Account Managers** can upload requests through the **Indirect Chase** tool, but anyone can search for them.

Identifier	External ROI ID
Value	<b>Unique_Chase_ID1</b> from XLSX file Must be an <b>EXACT</b> match. If you enter only part of the value, <b>NO</b> results will be returned.

**Search Criteria**

BY TYPE OF IDENTIFIER: External ROI ID (dropdown)  BY LOCATION(s): All Sites (dropdown)

BY REQUEST STATUS: -- Select Request Milestone -- (dropdown) -- Select Request Status -- (dropdown) -- Select Reason -- (dropdown)  Certification Required  Escalated

BY REQUEST OPTIONS: -- Select Request Type -- (dropdown) -- Select Requester Class -- (dropdown) -- Select Request Reason -- (dropdown)

Enter Requester Name or Number:  -- Select Intake Type -- (dropdown)

BY DATE RANGE: Intake Date (dropdown) mm/dd/yyyy (calendar) mm/dd/yyyy (calendar) BY PATIENT NAME AND DOB: Last Name (input) First Name (input) MM/DD/YYYY (input)

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Total items displayed - 1

eRequest												
STAT	Site ID	ID	Group ID	Requester Name	Requester Clas:	Patient Name	DOB	Intake Date	Facility Rcvd Date	Days Due	Request Status	Reason
<input type="checkbox"/>	47604 - S...	2808553	53123	VERSCEND HU...	Electronic In...	ELEX Q ALS...	05/08/19...	09/03/2019 10:17 ...	09/03/2019	24 Over	Ready to Fulfill	

To locate **ALL** the requests in a Chase File, search by the Group ID and enter the **Pull List ID** value from the XLSX file.

## UPDATED HIPAA AUTHORIZATION FORM

The **Ciox Health** compliance team has changed the **HIPAA Authorization Form** that is included with the **Correspondence Letter** sent for any of these reasons:

Correspondence Reasons	
Logging	Fulfillment
Authorization Missing	Authorization Sensitive Information Partial Records
Authorization missing TPO statement	
Expired Authorization	
Person Authorized to Make Disclosure Missing	

The **HIPAA Authorization Form** now includes a TPO statement as line 4:

I understand that by signing this authorization my treatment, payment and enrollment in a health plan or eligibility for benefits will not be conditioned upon my authorization of this disclosure.

The **Correspondence Letters** themselves have not changed. Only the text on the **HIPAA Authorization Form** that is automatically included with those letters has been updated.

## THIRD PARTY INTEGRATION CHANGES

Requests can be automatically created from data submitted directly to **HealthSource Clarity** by requesters. This process is typically used by high-volume requesters, like major insurance companies, who have entered into a data integration agreement with Ciox Health. The requests don't require any logging when the process works correctly — they go straight to Fulfillment, with a Request Letter already attached and most of the data entry fields already filled out.

We've made several changes to the way we work with these kind of requests.

- [Automatically populate requester information](#)
- [Notify requester of receipt / lack of Request Letter](#)
- [Accept patient identifiers from EMSI](#)
- [Update requester for specific workflow events](#)

Many of these changes won't be obvious when you're logging or fulfilling the requests.

## Automatically populate requester information

**IF** an integration customer's data file provides **EITHER** of these values:

- **Customer Identification** (Requester ID)
- **Billing Address**

**AND** we find a single match in the **HealthSource Clarity** requester database;

**THEN** we automatically populate these values

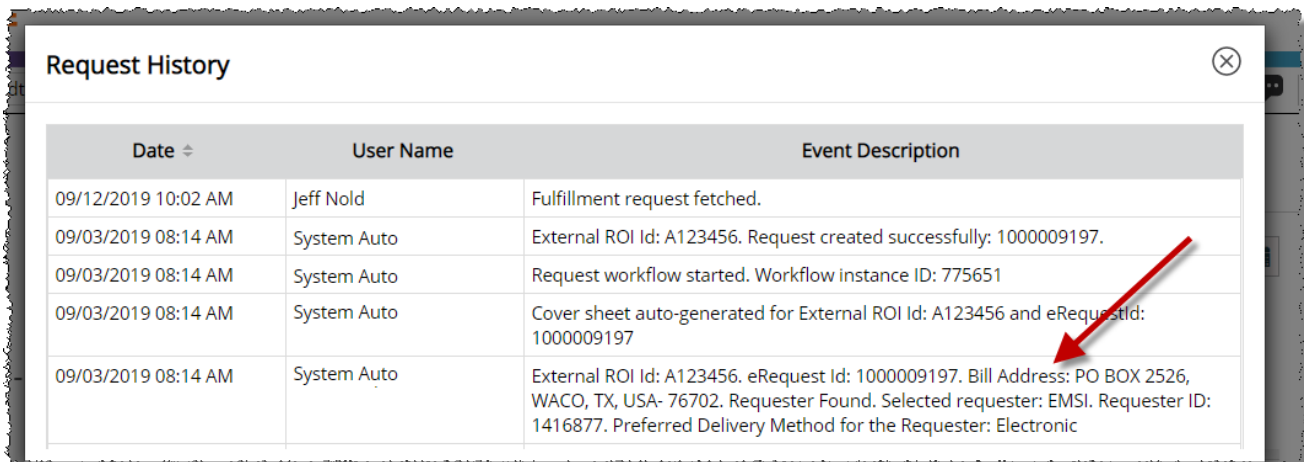
- **Requester Name.** This value can now include special characters, except %.  
Maximum length = 100 characters.
- **Requester Address**
- **Major Class**
- **Requester Type** (PAYD or PAYI)
- **Requester #**
- **Delivery Method**
- **Ship To** and **Bill To** addresses

**IF** we find multiple matches (based on the **Billing Address**), you'll be able to select from the possible requester choices.

## Request History tracks automatic events

The **Request History** tracks the success and failure of the requester lookup process.

User Name	Success Event Description
System Auto	External ROI ID (External ROI ID #)
System Auto	Request created successfully (eRequest ID)
System Auto	Bill Address
System Auto	Requester Found
System Auto	Selected requester (Requester name, ID)
System Auto	Preferred Delivery Method



Date	User Name	Event Description
09/12/2019 10:02 AM	Jeff Nold	Fulfillment request fetched.
09/03/2019 08:14 AM	System Auto	External ROI Id: A123456. Request created successfully: 1000009197.
09/03/2019 08:14 AM	System Auto	Request workflow started. Workflow instance ID: 775651
09/03/2019 08:14 AM	System Auto	Cover sheet auto-generated for External ROI Id: A123456 and eRequestId: 1000009197
09/03/2019 08:14 AM	System Auto	External ROI Id: A123456. eRequest Id: 1000009197. Bill Address: PO BOX 2526, WACO, TX, USA- 76702. Requester Found. Selected requester: EMSI. Requester ID: 1416877. Preferred Delivery Method for the Requester: Electronic



## Notify requester of receipt / lack of Request Letter

**HealthSource Clarity** sends a **Request Response** file to our integrated customers. This file indicates whether we were able to import the customer's data file and create requests from it.

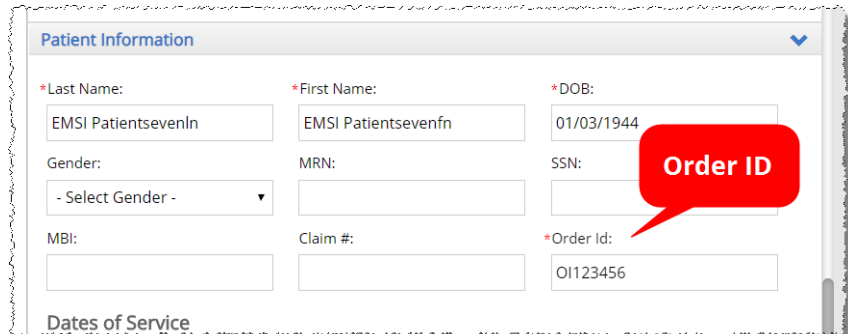
The response now indicates whether the customer's data file included an actual Request Letter for each request. This response helps customer's understand how their own data submission process is working.

- **YES** — we attach the customer's Request Letter to the request.
- **NO** — we automatically generate an E-Request Letter based on the request information.

## Accept patient identifiers from EMSI

One of our high-volume integration customers, EMSI, uses two patient identifier fields that are not commonly required:

- **Case #**
- **Order ID**



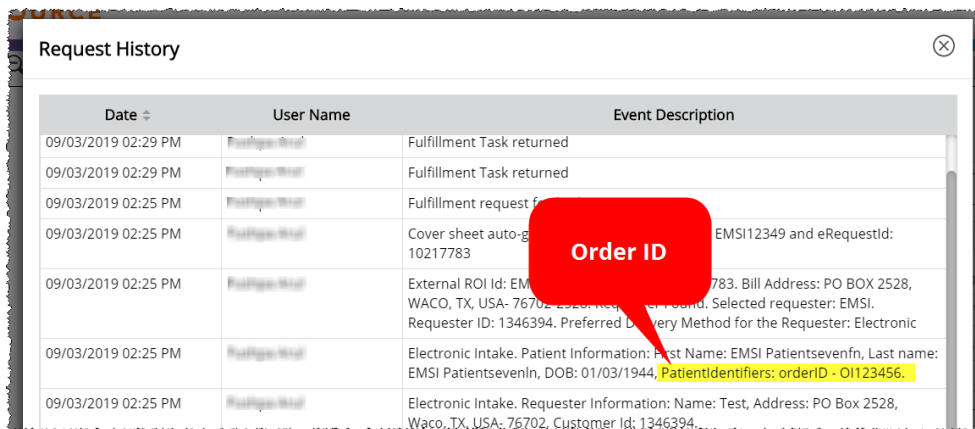
The screenshot shows a 'Patient Information' form with the following fields:

- \*Last Name: EMSI PatientsevenIn
- \*First Name: EMSI Patientsevenfn
- \*DOB: 01/03/1944
- Gender: - Select Gender -
- MRN: [Empty]
- SSN: [Empty]
- MBI: [Empty]
- Claim #: [Empty]
- \*Order Id: OI123456

A red callout bubble labeled 'Order ID' points to the \*Order Id field.

If a file from EMSI contains either of these values, we will now automatically add the relevant field when we create a request and fill it with the data provided by EMSI.

The automatic entry will be noted in the **Request History**.



The screenshot shows a 'Request History' table with the following data:

Date	User Name	Event Description
09/03/2019 02:29 PM	PostRequest	Fulfillment Task returned
09/03/2019 02:29 PM	PostRequest	Fulfillment Task returned
09/03/2019 02:25 PM	PostRequest	Fulfillment request f
09/03/2019 02:25 PM	PostRequest	Cover sheet auto-g EMSI12349 and eRequestId: 10217783
09/03/2019 02:25 PM	PostRequest	External ROI Id: EM 783. Bill Address: PO BOX 2528, WACO, TX, USA- 76702. Selected requester: EMSI. Requester ID: 1346394. Preferred Delivery Method for the Requester: Electronic
09/03/2019 02:25 PM	PostRequest	Electronic Intake. Patient Information: First Name: EMSI Patientsevenfn, Last name: EMSI PatientsevenIn, DOB: 01/03/1944, Patientidentifiers: orderID - OI123456.
09/03/2019 02:25 PM	PostRequest	Electronic Intake. Requester Information: Name: Test, Address: PO Box 2528, Waco, TX, USA- 76702, Customer Id: 1346394.

A red callout bubble labeled 'Order ID' points to the 'Patientidentifiers: orderID - OI123456' field in the Event Description of the fifth row.

Previously, we accepted these patient identifiers from “integrated” customers:

- SSN
- MBI
- MRN
- ACC

## Update requester for specific workflow events

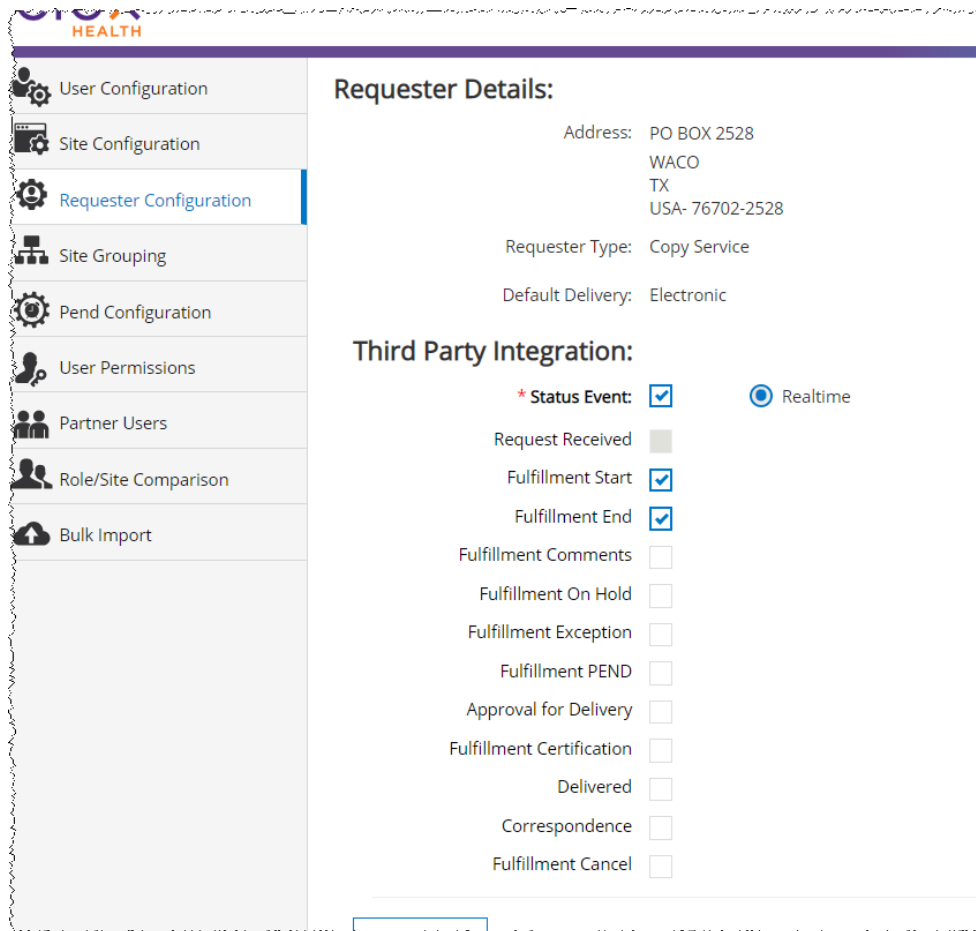
We can notify “integrated” requesters when a request reaches any of these status values:

- Fulfillment Start
- Fulfillment End
- Fulfillment Comments
- Fulfillment On Hold
- Fulfillment Exception
- Fulfillment PEND
- Approval for Delivery
- Fulfillment Certification
- Delivered
- Correspondence
- Fulfillment Cancel

This process is configured on the **Requester Configuration** page of the **Platform Admin** application, **NOT** in **HealthSource Clarity**.

## Access the Requester Configuration settings

1. Log into **Platform Admin**.
2. Open the **Requester Configuration** tab and select the requester.
3. In the **Third Party Integration** section of the **Requester Details** page:
  - 3.1 Select the **Status Event** checkbox. The **Realtime** button is enabled by default and cannot be disabled.
  - 3.2 Select the appropriate events.



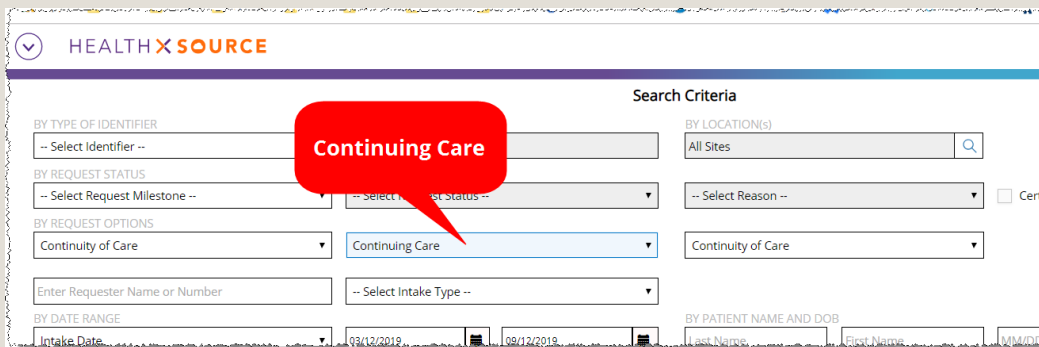
## DEFECTS FIXED

Some sites reported that **Due Dates** were either not calculated or not saved with requests. We have adjusted the workflow to ensure that these values are retained.

The **Due Date Management** feature is optional and is not enabled at most sites currently.

When searching for **Continuity of Care** requests, the **Requester Class** choice is now limited to Continuing Care.

Previously, this search value defaulted to Clinic, which caused the search to return no or incomplete results.



HEALTHSOURCE

Search Criteria

BY TYPE OF IDENTIFIER: -- Select Identifier --

BY REQUEST STATUS: -- Select Request Milestone --, -- Select Request Status --, -- Select Reason --

BY REQUEST OPTIONS: Continuity of Care (dropdown), **Continuing Care** (dropdown), Continuity of Care (dropdown)

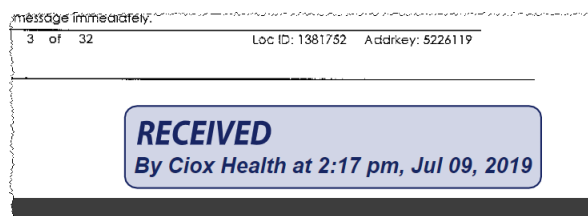
Enter Requester Name or Number, -- Select Intake Type --

BY DATE RANGE: Intake Date, 03/12/2019, 09/12/2019

BY PATIENT NAME AND DOB: Last Name, First Name, W/M/D/O

Retain the Received Stamp on Request Letters.

Some users reported that the Received Stamp was being “stripped” from Request Letters. We have adjusted our Automated Data Extraction tool to retain this stamp.



Limit patient identifier values (SSN, MRN, EMRN, Patient Account / Control #) to 50 characters when creating requests from a Pull List.

Previously, users had been able to enter more than 400 characters in these fields.

DDS requests saved or submitted with Mail as the **Delivery Method** would switch to Electronic when reopened.

We deliver all DDS requests electronically. From now on, the **Delivery Method** will be set to Electronic and this field will not be editable.

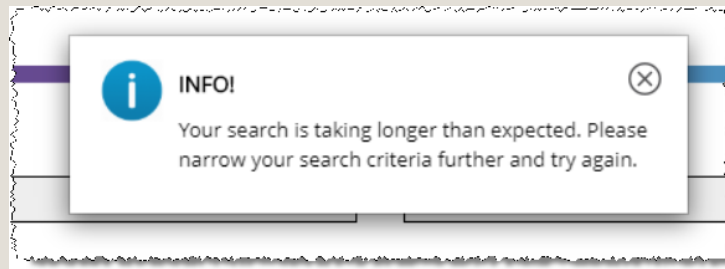
Some users reported seeing a page count error when opening requests that include Correspondence. The backend logic has been adjusted to prevent these errors.

Users sent to **My Work Queue** because DDS request fails to open. This problem was caused by DDS letters that include multiple bar codes.

- If we can identify the DDS site information, the requester information will automatically populate.
- If the DDS bar code contains invalid site information, the CSR must manually select the requester.

If a request search takes too long, the user will now see a warning message.

Previously, we told users that there were no results, even though a long search was usually caused by finding too many requests.



Escalating a request that requires certification causes the request to be "locked," so that only the user who escalated it can open it again.

We have adjusted the workflow so these requests can be edited by other users after escalation.

Some users reported that the **DOB** value was cleared out after they sent **Logging Correspondence**. We have adjusted our request save process to retain any data that has already been entered.