HealthSource Clarity

v1.5 Release Notes

July 2019

Document History

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Contact Information

Ciox Health

120 Bluegrass Valley Parkway

Alpharetta, GA 30005

Customer Care Phone Number: 877-358-6939

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HealthSource Clarity v1.5 Release Notes

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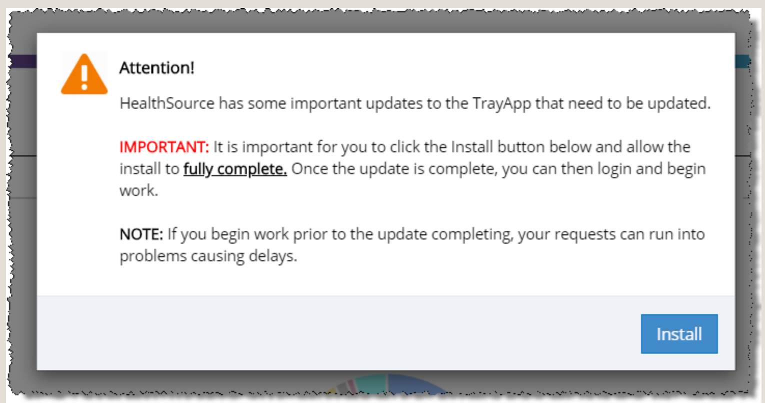
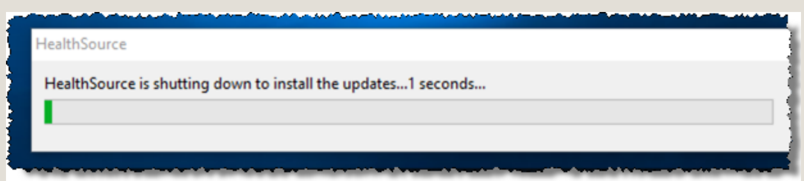
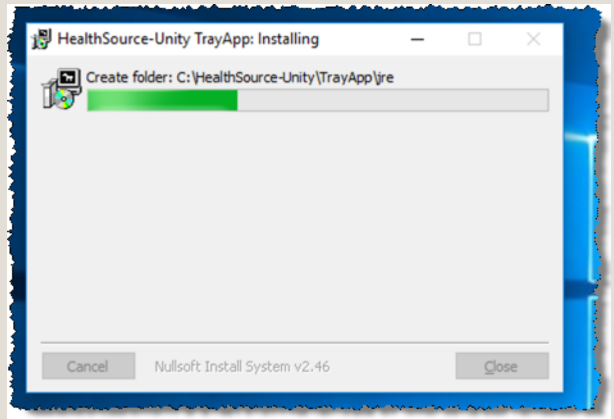
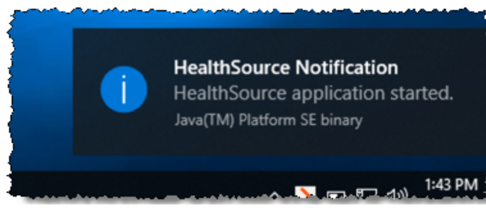
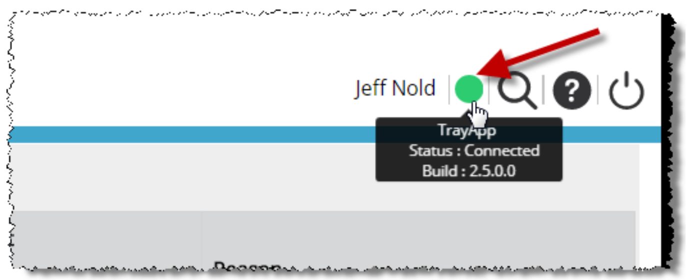
TrayApp update required

To use **HealthSource Clarity v1.5**, 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.

Log into **HealthSource Clarity**.	
Click **Install** on the **Info** box.	
HealthSource Clarity logs you out.	
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**.	

The **TrayApp** update installs itself.	
The updated **TrayApp** starts itself.	
Log back into **HealthSource Clarity**.	
Hover your cursor over the **TrayApp** indicator in the top right corner of the **HealthSource Clarity** screen. This indicator is new for **v1.5**.	
Does the **Build** = <u>2.50.00</u> ?	
YES	Start working.
NO	Contact Customer Care at 877-358-6939.

Request Status replaces Task Type

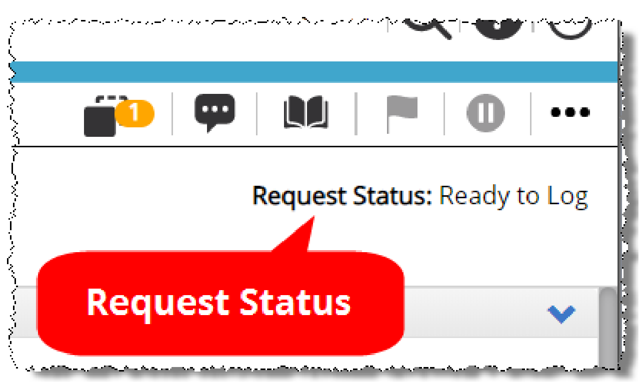
We've changed **Task Type** to **Request Status**.

The individual **Request Status** values are grouped in **Request Milestones**, which replaces the previous concept of **Task Type Category**.

The new **Status** values will help users distinguish between requests that are ready to be worked on and those that are going through an automated step of the workflow or a special path.

Will be after v1.5	Was
Request Milestones	Task Type Category
Request Status	Task Type

You'll see this change reflected on these screens:



- **Search Results**
- **My Work Queue**
- **Request** (used for logging, fulfilling, approval, certification, and new requester)
- **My Holds**
- **Potential Duplicates**

Existing requests automatically converted

Any requests that existed before the **v1.5** release will be automatically switched from **Task Type** to **Request Status**.

See pages 7 through 9 for information on the replacement **Status** values.

Request Status values

New for v1.5		Was
Request Milestone	**Request Status**	**Replaces these Task Types**
Logging	Ready to Log	Logging
	Returned to Logging	• Redo Logging • Back to Logging
	Split	Split
	Logging Exception	Logging Exception
	Logging User Hold	Logging On Hold
	Logging Quality Control	Logging QC
Fulfillment	Ready to Fulfill	• Fulfillment • Back to Fulfillment
	Pending	Fulfillment Pend
	Fulfillment Exception	Fulfillment Exception
	Fulfillment User Hold	Fulfillment On Hold
	Fulfillment Quality Control	Fulfillment QC
Awaiting Approval	Awaiting Fulfillment Approval	Approval for Fulfillment
	Awaiting Delivery Approval	Approval for Delivery
	Awaiting Certification	Certification

New for v1.5		Was
Request Milestone	**Request Status**	**Replaces these Task Types**
Packaging	Packaging in Process	• Sent for Processing • Processing Logging Correspondence • Processing Fulfillment Correspondence • Fulfillment Transmission
	Back Office	• Ready for Indexing • Pricing • Invoicing • Indexing • Transmitted • Ready for Delivery
	Packaging Exception	Exceptions
Delivery	Correspondence	• Logging Correspondence • Fulfillment Correspondence
	Delivered	• Delivered • Delivery • Submitted • FACC Accepted • ACK Delinquent
	Delivery Failure	FACC Failure
	Delivered w / Acknowledge Exception	Acknowledgment Failure
	Delivered & Acknowledged	Acknowledgment Received

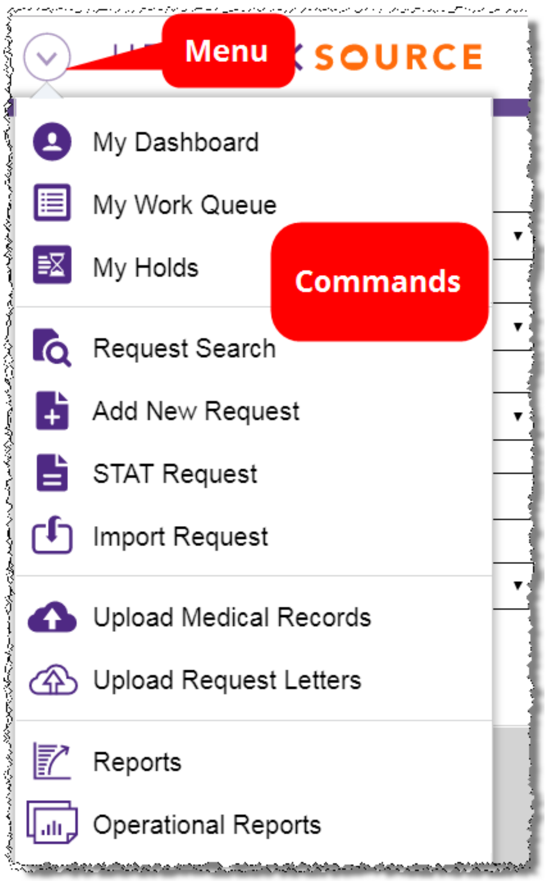
<table>
<tr><th colspan="2">New for v1.5</th><th>Was</th></tr>
<tr><th>Request Milestone</th><th>Request Status</th><th>Replaces these Task Types</th></tr>
<tr><td rowspan="3">Closed</td><td>Cancelled</td><td>• Logging Cancelled
• Fulfillment Cancelled</td></tr>
<tr><td>Not Approved by Client</td><td>Approval for Fulfillment Rejected</td></tr>
<tr><td>Pull / Batch List Complete</td><td>• Batch Complete
• Split Complete</td></tr>
<tr><td>Requester Setup</td><td>New Requester Setup</td><td>• Logging New Requester
• Fulfillment New Requester</td></tr>
<tr><td rowspan="2">Support & Dev Review</td><td>Undetermined Site</td><td>• Logging Undetermined Site
• Fulfillment Undetermined Site</td></tr>
<tr><td>Transmission Errors</td><td>Package Error</td></tr>
</table>

CHANGES TO USER INTERFACE

We updated the look of **HealthSource Clarity** to make it easier to use.

Symbol	Will be after v1.5	Was
Menu. See page 11 for details.		
Log off		
Remove Hold		
Put on Pend		
Currently pending		
Escalated	< 2 days / < 4 days / < 6 days	< 2 days / < 4 days / < 6 days
Move up / down one page		
Drag / Scan / Attach a document	Drag Medical Records or Click to upload OR Click here to Scan Medical Records	Browse to attach Medical Records OR Click here to Scan Medical Records

Menu

<table>
<tr><th>Will be after v1.5</th><th>Was</th></tr>
<tr><td>


</td><td>


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

As always, the commands available from the **Menu** depend on your **User Role**.

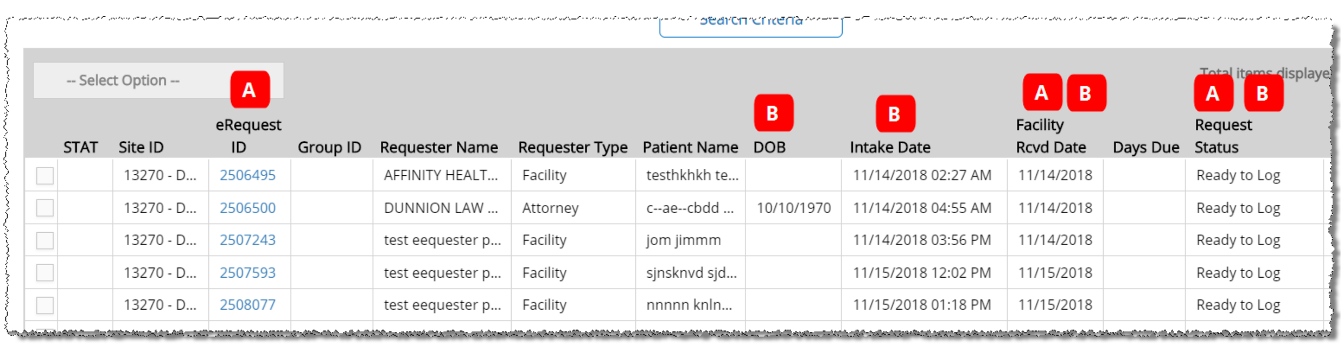
Request List pages

We changed the layout of these pages so you can more easily locate the information you're looking for:

- **Request Search**
- **My Work Queue**
- **My Holds**
- **Potential Duplicates**

Reference	Description
A	Some column labels, like **eRequest ID** and **Request Status**, are now permanently "wrapped" to minimize the horizontal space they occupy. This wrapping remains even if you resize the browser window itself.
B	Several columns, such as **DOB** and **Intake Date**, now show the entire data value by default, rather than cutting off the data. The values in these columns will eventually be cut off if you make the browser window small enough.

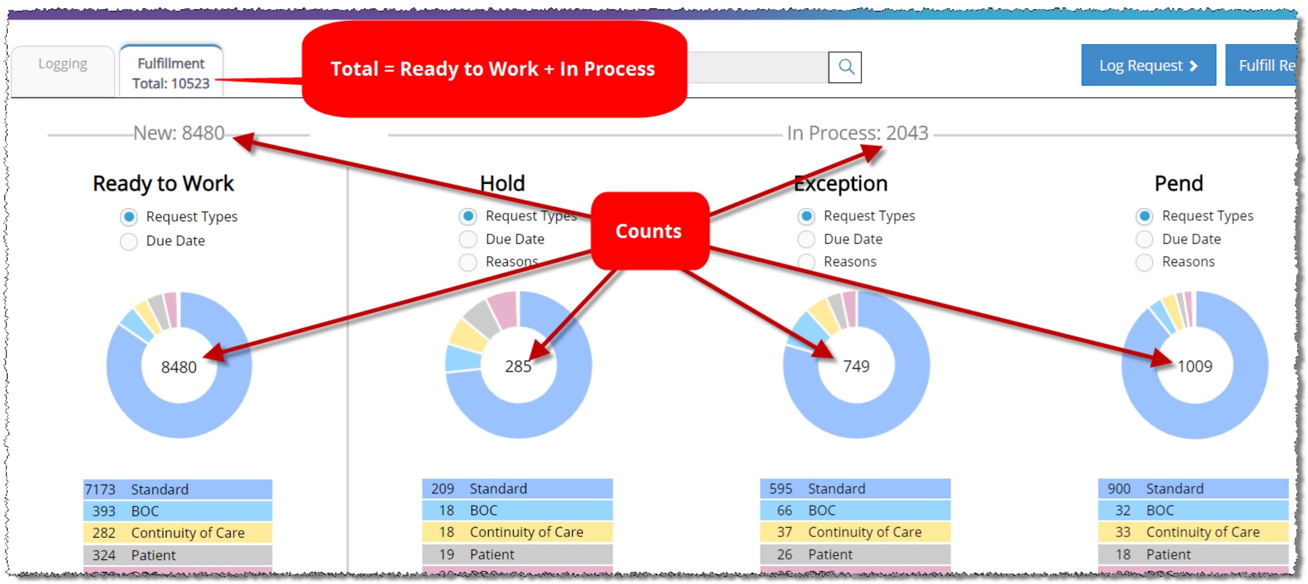
The following example shows the changes to the **Request Search** page. Other pages have slightly different changes, but the same general rules have been applied to all of them.



STAT	Site ID	eRequest ID	Group ID	Requester Name	Requester Type	Patient Name	DOB	Intake Date	Facility Rcvd Date	Days Due	Request Status
	13270 - D...	2506495		AFFINITY HEALT...	Facility	testhkhkh te...		11/14/2018 02:27 AM	11/14/2018		Ready to Log
	13270 - D...	2506500		DUNNION LAW ...	Attorney	c--ae--cbdd ...	10/10/1970	11/14/2018 04:55 AM	11/14/2018		Ready to Log
	13270 - D...	2507243		test eequester p...	Facility	jom jimmm		11/14/2018 03:56 PM	11/14/2018		Ready to Log
	13270 - D...	2507593		test eequester p...	Facility	sjnsknvd sjd...		11/15/2018 12:02 PM	11/15/2018		Ready to Log
	13270 - D...	2508077		test eequester p...	Facility	nnnnn knln...		11/15/2018 01:18 PM	11/15/2018		Ready to Log

Request counts on My Dashboard

The **My Dashboard** tabs and charts now provide a numeric count of the requests in each category:



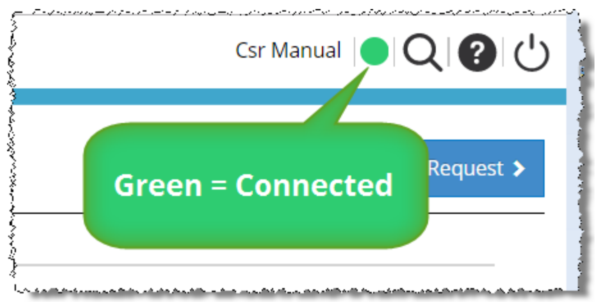
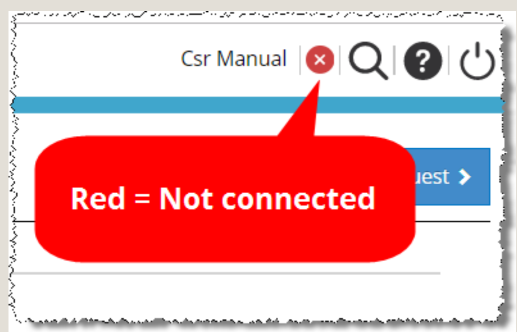
As with the switch to **Request Status** (page 6), this new information should help users focus on requests that are ready to work right now, as opposed to those that have been "shunted" to alternate paths.

Value	Definition	
	Logging tab	**Fulfillment tab**
Tab total	All requests in any **Logging** status.	All requests in any **Fulfillment** status.
New	Requests that are **Ready to Log**.	Requests that are **Ready to Fulfill**.
In Process	Sum of requests in these statuses: • **Logging User Hold** • **Logging Exception**	Sum of requests in these statuses: • **Fulfillment User Hold** • **Fulfillment Exception** • **Pending**

Visual indication of TrayApp status

You can now see whether the **TrayApp** is running from within **HealthSource Clarity** itself. This indicator will help avoid delays caused by the need to restart the **TrayApp** after you log in.

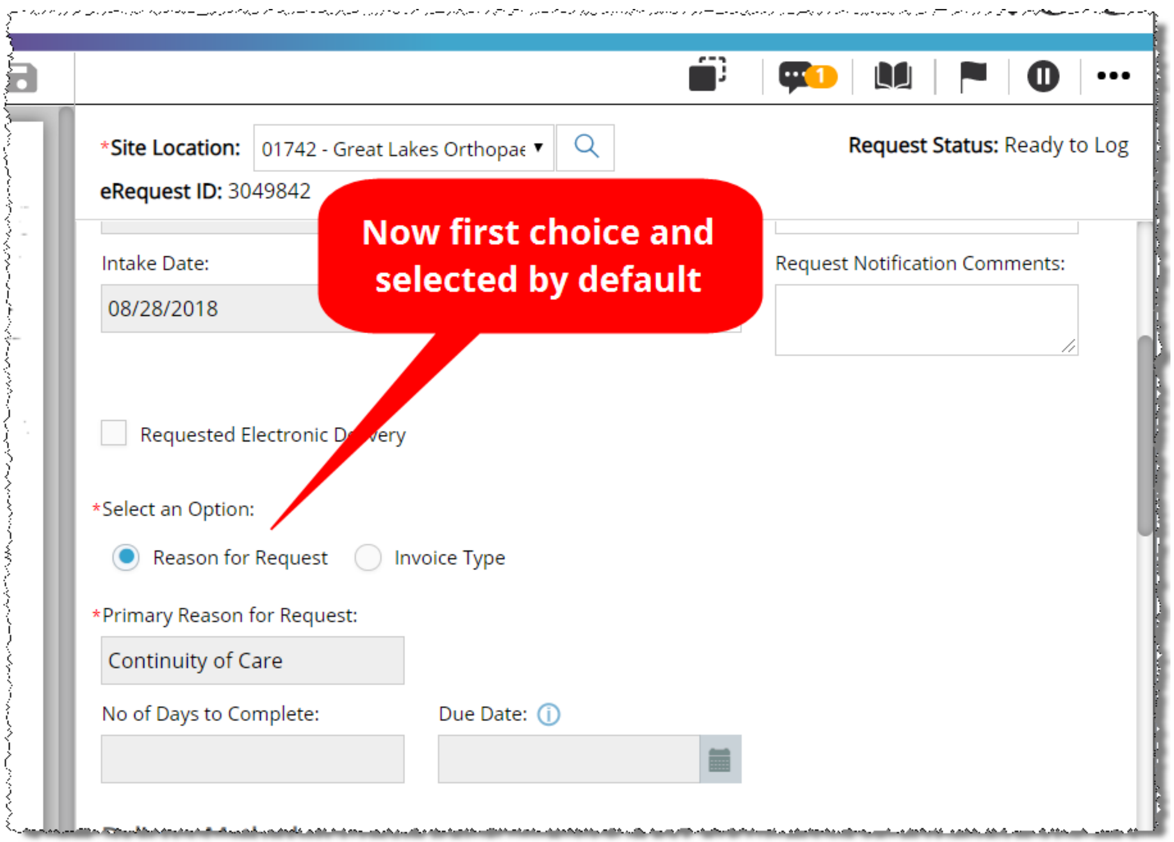
The **TrayApp** indicator can be found next to your user name in the upper right corner of the application.

Color	Meaning	Example
GREEN	**TrayApp** running and connected.	
RED	**TrayApp** not currently connected.	

Reason for Request field repositioned and selected by default

The **Reason for Request** field has been moved to the left of the **Invoice Type** field, so that you reach it first when you move through the data entry fields during **Logging**.

Reason for Request is also now selected by default.



These changes will make it easier to use the **Reason for Request** option, which we strongly recommend.

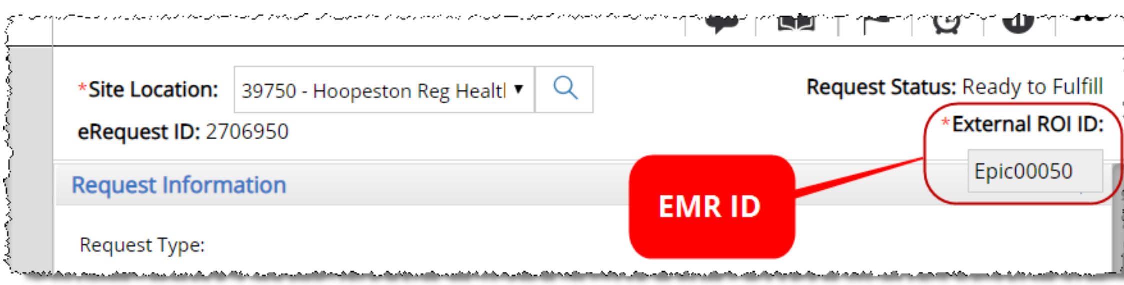
Integration with Epic EMR

HealthSource Clarity v1.5 will be the first version of the application that can be integrated with the Epic Electronic Medical Record (EMR) system. The bilateral flow of information between the two applications reduces the manual work needed to satisfy ROI requests.

The integration of these two applications, and the effect of the integration on **HealthSource Clarity** users, is covered in the *HealthSource Clarity and Epic Integration Guide*.

The following list provides a high-level overview of the way the systems work together:

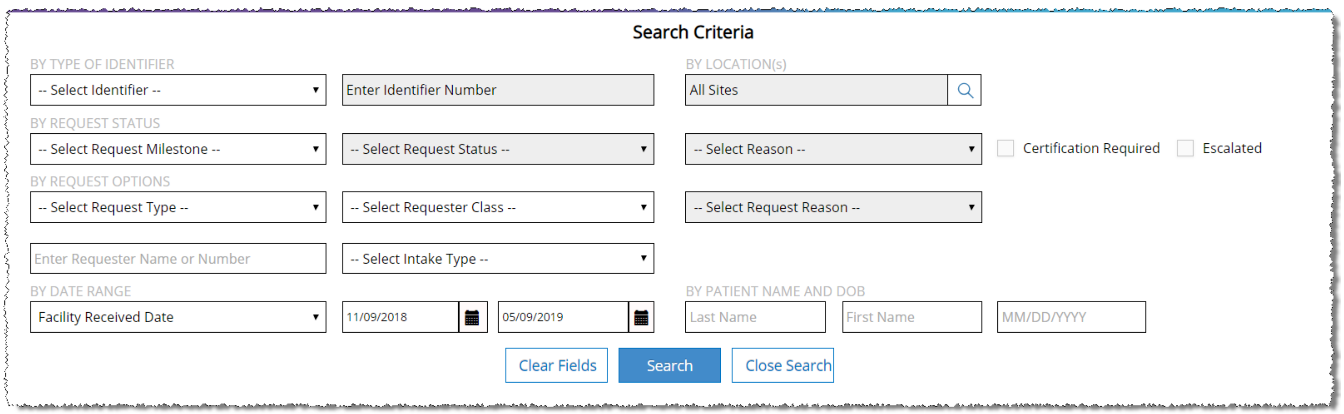
- **HealthSource Clarity** can lookup Epic patient data during **Logging** and **Fulfillment**.
- If the Epic lookup does not locate a patient, the **HealthSource Clarity** user can flag the patient as **Non-EMR**.
- An Epic Release can be automatically created for each request added to **HealthSource Clarity**.
- Real-time update of Epic with event information from **HealthSource Clarity**.
- **External ROI ID** value visible when working on a request in **HealthSource Clarity**.



- You can run a **Request Search** using the **External ROI ID**. See page 20 for more information.

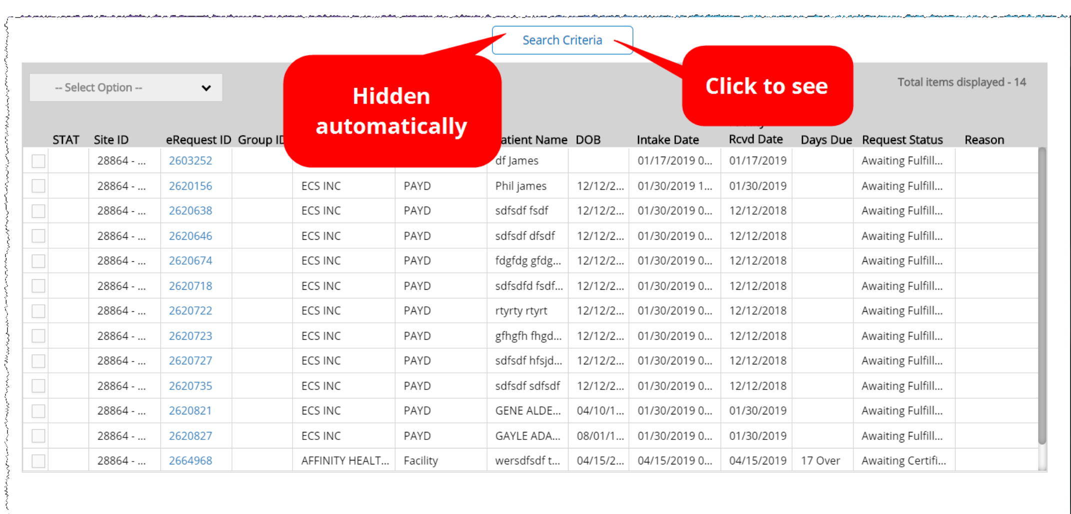
REQUEST SEARCH CHANGES

The layout of the **Request Search** page is now horizontal rather than vertical, with the **Search Criteria** fields arranged along the top of the screen.



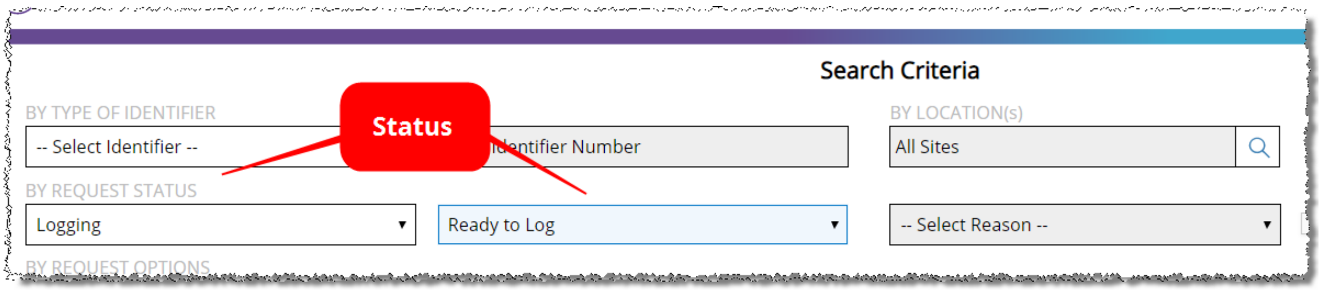
The **Search Criteria** fields have also been re-ordered to reflect how often they are actually used. For example, **Patient Name / DOB** searches are relatively rare, so those fields are now located at the bottom right of the **Search Criteria** section.

After you run a search, the **Search Criteria** section is automatically hidden so you can see the **Search Results** more easily.



Request Status rather than Task Type

The **Search Criteria** fields reflect the change from **Task Type** (previous) to **Request Status** (new). See page 6 for more information on this change.



Changes to Date Range searches

You can now search by three date values:

Date Value	New for v1.5?	Works differently than in previous versions?
Facility Received Date	NO	YES Now does NOT find requests with a blank **Facility Received Date**.
Intake Date	YES	NO
Days Due	No, but it is no longer a separate **Search** field.	NO

The **Facility Received Date** is the default selection.

If you search by Facility Received Date, the **Search Results** will no longer include requests that do not have a value in that field.

Requests that have not yet been logged will not be captured in this kind of search.

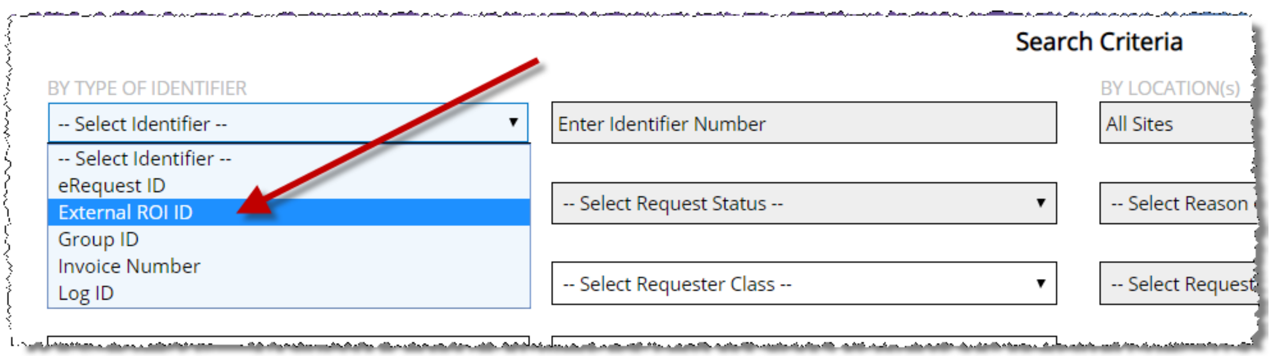
Consider searching by Intake Date instead.

Search by External ROI ID

The **Request Search** tool now allows you to look for a request by an identification value assigned by a third-party. This change is part of our effort to integrate **HealthSource Clarity** with external EMR applications like Epic, as described on page 16.

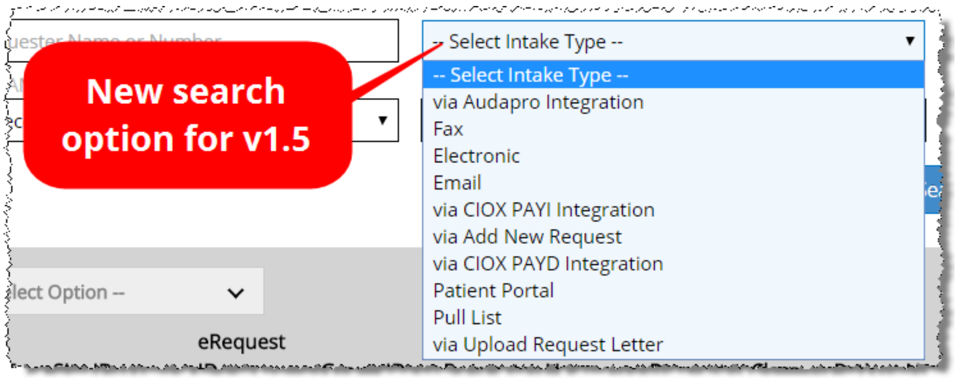
- Alphanumeric characters allowed
- Exact match only — no partial matches or near matches will be returned.

This search looks within **HealthSource Clarity** for a request that is associated with a specific **External ROI ID** value. It does **NOT** search the third-party application directly.



Search by Intake Type

The new **Intake Type** filter lets you look for requests based on how they entered **HealthSource Clarity**:



via AudaPro Integration	Pushed to **HealthSource Clarity** from **AudaPro**.
Fax or Split	Either faxed to a site-specific number or created through a manual **Split** command.
Electronic	Imported from an EMR application.
Email	Created from an email attachment.
via CIOX PAYI Integration	Loaded through the **Indirect Chase** function.
via Add New Request	Created through the manual **Add New Request** command.
via CIOX PAYD Integration	Sent from the Ciox Phoenix operation.
Patient Portal	Entered in the online Patient Portal.
Pull List	Child requests from a Pull List parent.
via Upload Request Letter	Created through the **Upload Request Letters** function.

Fulfillment improvements

HealthSource Clarity v1.5 makes it much easier to perform **Fulfillment**, the capture of Medical Records for a request:

- Support for large Medical Records
- Fulfillment User Hold is “personal” and time-limited
- Pend and Close replaces Save and Close in Fulfillment
- No more Remove command for Hold, Pend, and Exceptions
- Modify Request Letter during Fulfillment
- Add Other Requested Records during Fulfillment

Support for large Medical Records

You can now attach, view, and navigate through very large Medical Records.

We “break” documents larger than 100 MB into separate **Files**. For example:

File #	Size
File 1	0 —100 MB
File 2	100 — 200 MB
File 3	200 — 300 MB

The “breaking” occurs whether you attach a single file that is larger than 100 MB or you attach multiple files that add up to more than 100 MB.

This change applies **ONLY** to documents that are attached directly to a request.

It does **NOT** apply to scanning or printing to file.

File size, not page count

The division is based on file size (data), **NOT** on page count. Documents can:

- Contain thousands of pages and remain below the 100 MB limit;
- Contain relatively few page but be so “dense” with data that they must be divided.

Move between pages

You can move between the pages of a single file using the normal **Move Up** / **Move Down** and **Page #** commands, either on the **Document** toolbar or by a shortcut key combination.

These commands work “inside” a single file and “between” separate files. For example:

Current page	Command	Button	Shortcut	Takes you to
First page of File 1	Move Down		ALT + W	Page 2 of File 1
Last page of File 1	Move Down		ALT + W	First page of File 2
Last page of File 1	Move Up		ALT + U	Previous page of File 1
First page of File 2	Move Up		ALT + U	Last page of File 1

Move between files

You can also “jump” between files — not pages — with the **First**, **Back**, **Next**, and **Last** buttons:

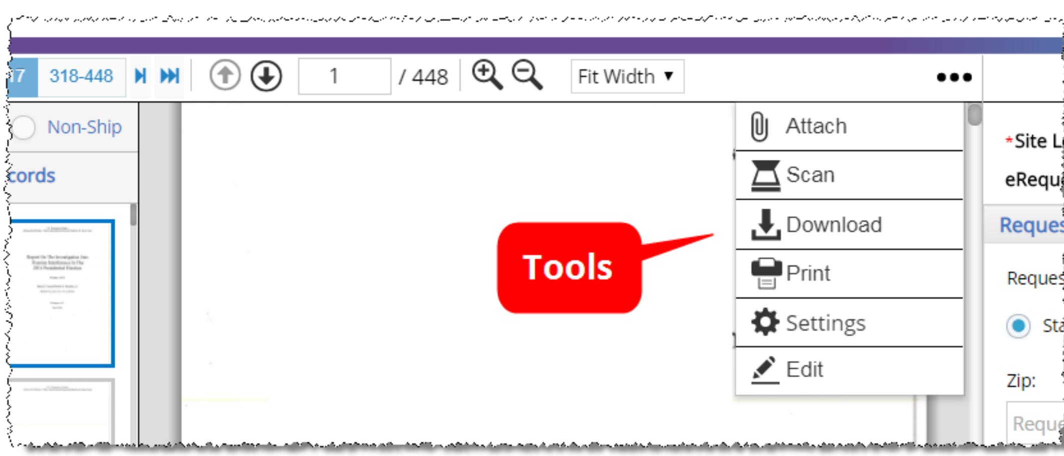
Button	Name	Takes you to
	First	Page 1 of File 1
	Back	Page 1 of Previous File
	Next	Page 1 of Next File
	Last	Page 1 of Last File

Access the Documents tools when viewing a large file

Because the new large file movement commands (pages 24 and 25) require space on the **Documents** window, you won't immediately see these commands when viewing a large Medical Record:

- **Attach**
- **Scan**
- **Download**
- **Print**
- **Settings**
- **Edit**

To access those commands, click the three black dots on the far right side of the **Documents** toolbar:



Fulfillment User Hold is “personal” and time-limited

Requests placed in the **Fulfillment User Hold** status are now “reserved” for the person who put them **On Hold** for a two-hour period. Only that user can edit and submit the request.

Others users can open **Fulfillment User Hold** requests in a read-only view, but they **CANNOT** edit or submit them.

For example:

1. John Doe puts Request 12345678 on hold during **Fulfillment**;

2. One hour later, Jane Dough opens Request 12345678.

3. The request appears to Jane Dough in read-only mode, because the hold has not yet expired.

4. 30 minutes later, John Doe opens the request and submits it. Had he waited another 30 minutes, his hold would have “expired” and the request would have moved to a **Pending** status.

What about Logging User Hold requests?

At this time, only **Fulfillment User Hold** requests are “personal” and reserved for the person who put them **On Hold**.

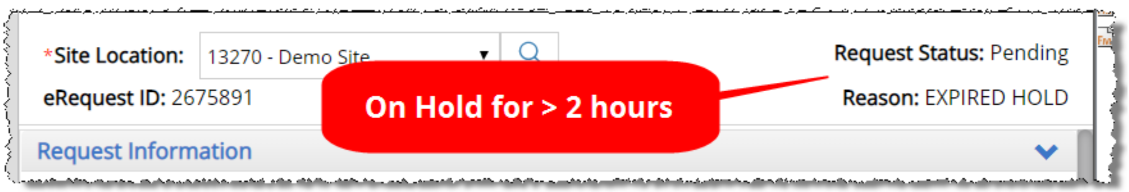
Logging User Hold requests can be opened by anyone, assuming that person has the correct user role

We plan to make **Logging User Hold** requests “personal” in a future release.

Fulfillment User Hold expires in two hours

A request can only remain in the **Fulfillment User Hold** status for a maximum of two (2) hours. After that:

- the **Request Status** automatically switches to **Pending**, with a **Reason** of Expired Hold.
- the request drops off the **My Holds** list for the user who placed it **On Hold** originally.



What about requests that were On Hold before v1.5?

In most cases, **Fulfillment** requests that were on hold **BEFORE** the release of **v1.5** will:

1. Switch to a **Request Status** of **Fulfillment User Hold** after the release.

2. **NOT** be worked on before the new 2 hour time limit expires.

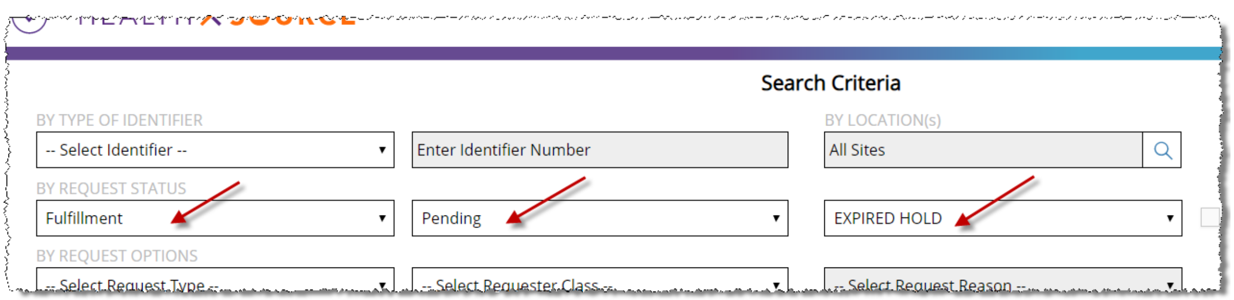
3. Automatically switch to a **Request Status** of **Pending**, with a **Reason** of Expired Hold.

Managers and supervisors should run this type of **Request Search** soon after the release of v1.5:

Request Milestone = Fulfillment

Request Status = Pending

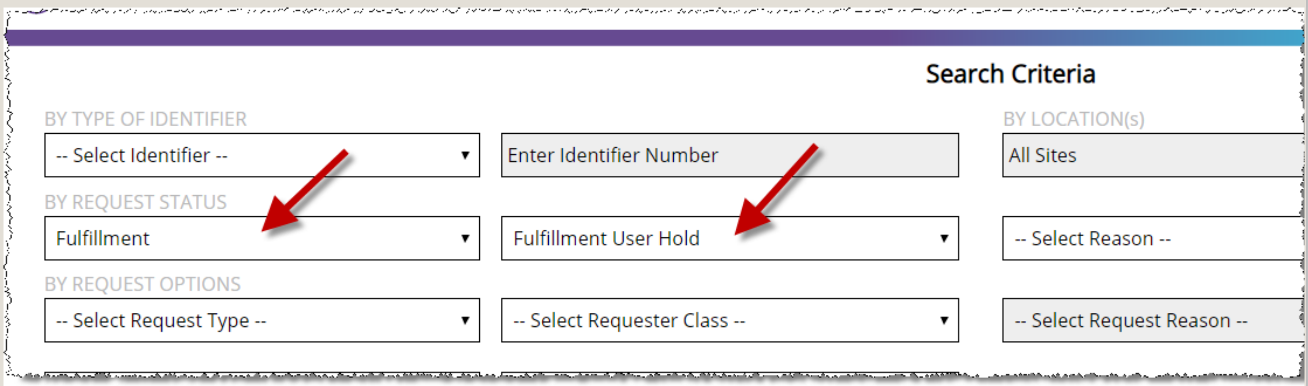
Reason = Expired Hold



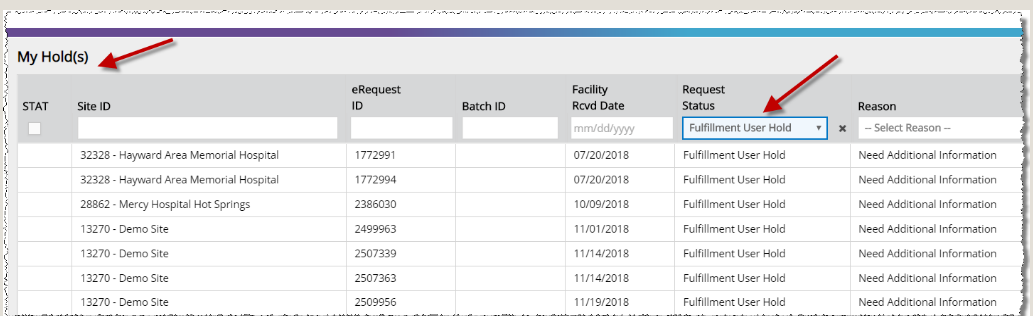
Locating Fulfillment User Hold requests

You can choose **Fulfillment User Hold** as a search / filter value when:

- running a **Request Search**



- filtering the **My Holds** list (page 31)



STAT	Site ID	eRequest ID	Batch ID	Facility Rcvd Date	Request Status	Reason
				mm/dd/yyyy	Fulfillment User Hold	-- Select Reason --
	32328 - Hayward Area Memorial Hospital	1772991		07/20/2018	Fulfillment User Hold	Need Additional Information
	32328 - Hayward Area Memorial Hospital	1772994		07/20/2018	Fulfillment User Hold	Need Additional Information
	28862 - Mercy Hospital Hot Springs	2386030		10/09/2018	Fulfillment User Hold	Need Additional Information
	13270 - Demo Site	2499963		11/01/2018	Fulfillment User Hold	Need Additional Information
	13270 - Demo Site	2507339		11/14/2018	Fulfillment User Hold	Need Additional Information
	13270 - Demo Site	2507363		11/14/2018	Fulfillment User Hold	Need Additional Information
	13270 - Demo Site	2509956		11/19/2018	Fulfillment User Hold	Need Additional Information

My Holds list

The **My Holds** list shows:

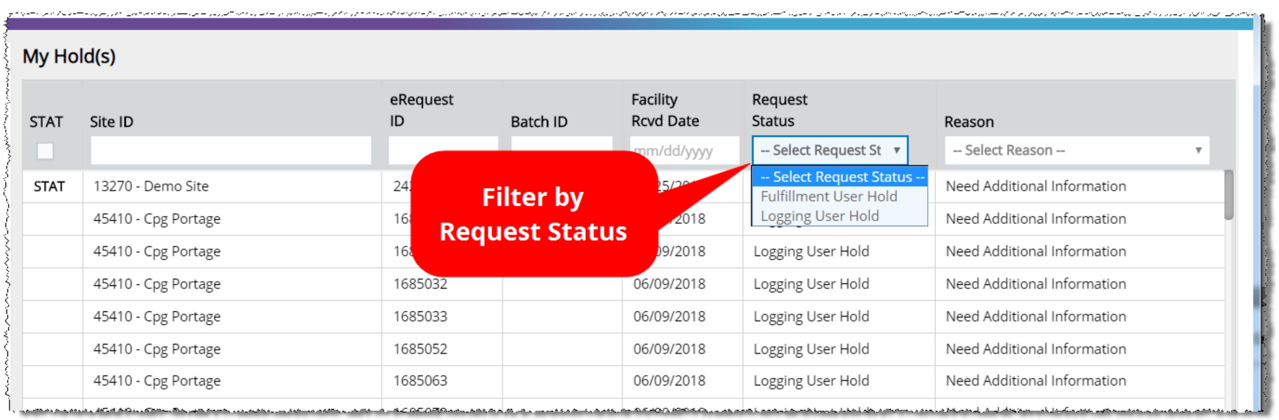
- Any **Logging User Hold** requests at the sites to which you have access;
- Any requests that **YOU** put **On Hold** during **Fulfillment** and which have not yet expired.

To view this list:

1. From the **Menu**, select **My Holds**.
2. You can filter the list by the desired **Request Status**:

   2.1 **Logging User Hold**

   2.2 **Fulfillment User Hold**



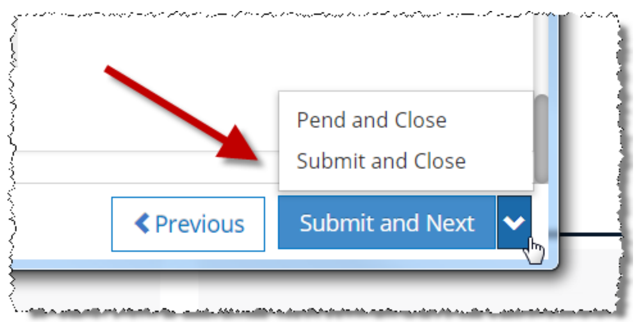
Pend and Close replaces Save and Close in Fulfillment

You can no longer **Save and Close** when the **Request Status** = **Ready to Fulfill**. Instead, choose from these options:

Option	New for v1.5?	Function
Submit and Next	No	Sends the request to the next step in the workflow. Loads the next request for you to work on, based on your role.
Pend and Close	Yes	Puts the request in **Pending** status. You are prompted to select a **Pend Reason**.
Submit and Close	No	Sends the request to the next step in the workflow. Returns you to the previous screen.

This change is intended to improve efficiency by keeping a request "moving" through the workflow, rather than being pushed back into the **Fulfillment** queue.

Some users would rely on the old **Save and Close** command to skip over troublesome requests without flagging them as being problematic.



The **Save and Close** command is still available when the **Request Status** is something **OTHER** than **Ready to Fulfill**. For example, you can still **Save and Close** requests that are:

- **Ready to Log**
- **Pending**
- in **Fulfillment User Hold** and then re-opened

No more Remove command for Hold, Pend, and Exceptions

We have eliminated these commands:

- **Remove Hold** (only removed for **Fulfillment User Hold**, not **Logging User Hold**)
- **Remove Pend**
- **Remove Exception**

We realized that you wouldn't open this kind of request unless you were ready to proceed, so the old **Remove** commands just slowed you down. Now you simply open the request and get to work.

The **Request Status** may change, depending on what actions you take. See the tables on pages 34 through 36 for details.

What happens when you work a Fulfillment User Hold request?

Action	Request Status is then...	What happens to the Hold?
Edit and / or save	Fulfillment User Hold	Nothing, remains
Edit and / or submit	• Packaging * • Approval for Delivery (if enabled) • Approval for Certification (if enabled)	Automatically removed
Flag as Exception	Fulfillment Exception	Automatically removed
Put on Pend	Pending	Automatically removed
Escalate	Fulfillment User Hold	Nothing, remains
Add Correspondence	Closed	Automatically removed
Resubmit to Logging	Returned to Logging	Automatically removed

* May be **Packaging in Process**, **Back Office**, or **Packaging Exception**, depending on how the request is processed.

What happens when you work a Pended request?

Action	Request Status is then…	What happens to the Pend?
Edit and / or save	Pending	Nothing, request remains on Pend
Edit and / or submit	• Packaging * • Approval for Delivery (if enabled) • Approval for Certification (if enabled)	Automatically removed
Flag as Exception	Fulfillment Exception	Automatically removed
Put on Hold	Fulfillment User Hold	Automatically removed
Escalate	Pending	Nothing, request remains on Pend
Add Correspondence	Closed	Automatically removed
Resubmit to Logging	Returned to Logging	Automatically removed

* May be **Packaging in Process**, **Back Office**, or **Packaging Exception**, depending on how the request is processed.

What happens when you work a Fulfillment Exception request?

One major benefit of this change is that you can now switch the **Exception Reason** without removing a request from the **Fulfillment Exception** status.

Previously, you could only change the **Exception Reason** by first removing the **Exception** condition itself, which put the request back into the regular **Fulfillment** queue. Another user could open it before you could find it and select the correct **Exception Reason**.

Action	Request Status is then...	What happens to the Exception?
Edit and / or save	Fulfillment Exception	Nothing, request remains in Fulfillment Exception
Edit and / or submit	• Packaging * • Approval for Delivery (if enabled) • Approval for Certification (if enabled)	Automatically removed
Pend	Pending	Automatically removed
Put on Hold	Fulfillment User Hold	Automatically removed
Escalate	Fulfillment Exception	Nothing, request remains on Pend
Add Correspondence	Closed	Nothing, request remains in Fulfillment Exception
Resubmit to Logging	Returned to Logging	Automatically removed

* May be **Packaging in Process**, **Back Office**, or **Packaging Exception**, depending on how the request is processed.

Modify Request Letter during Fulfillment

During **Fulfillment**, you can now modify the Request Letter in several ways:

- Add pages
- Delete pages
- Rotate pages
- Redact information

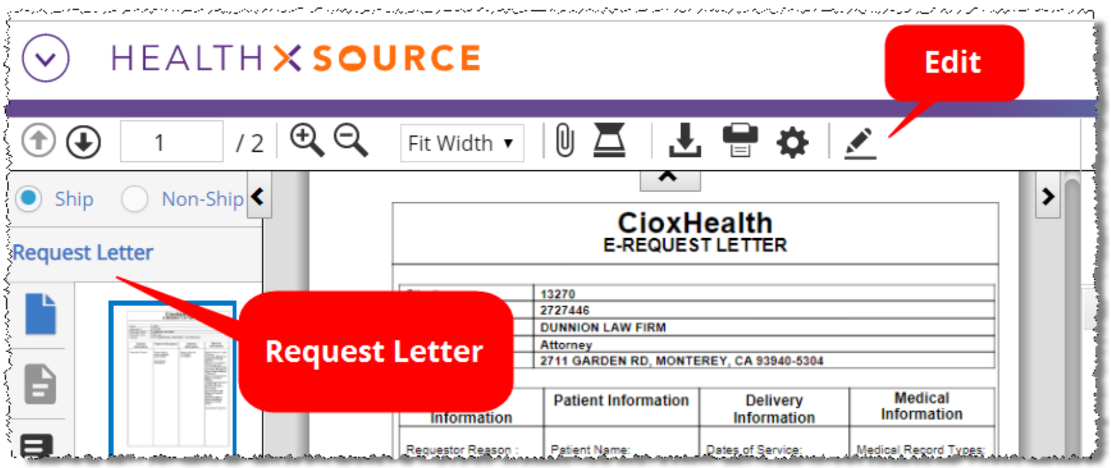
This change means you can fix many Request Letter issues without sending the request "backward" via the **Resubmit to Logging** command.

Previously, you could not modify the Request Letter after **Logging**.

> You **CANNOT** change the sequence of Request Letter pages during **Fulfillment**.
>
> If the pages are out of order, you can either delete the entire letter and upload a corrected version in **Fulfillment** or send the request back to logging.

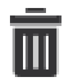
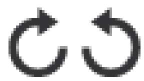
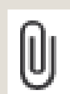
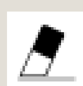
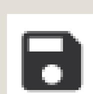
Instructions for editing a Request Letter

1. Click the **Edit** button in the **Documents** window toolbar.



2. The Request Letter opens in a new **Editing** window. You can make this window larger or drag it to another monitor to make it easier to see.

3. Use the appropriate commands:

Command	Toolbar	Keys	Purpose
Delete Page(s)		ALT + R	Remove the selected page(s).
Delete all pages	N/A	ALT + N	Delete all pages.
Rotate Right Rotate Left		N/A	Turn the page(s) 90 degrees to right or left.
Attach more pages		N/A	Add more Request Letter pages by uploading a new file.
Scan more pages		N/A	Add more Request Letter pages by scanning.
Redact		N/A	Hide sensitive or confidential information on the Request Letter.
Undo redaction		N/A	Remove any redactions made since the last time you saved the Request Letter.
Save redactions		N/A	“Locks” any redactions made that have not already been saved.

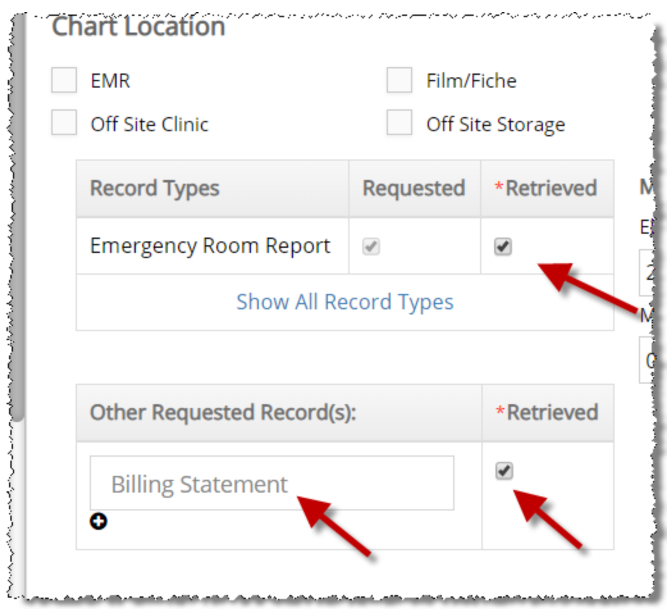
4. Click **Save And Close** or close the **Editing** window. However you close the window, your changes are saved.

Add Other Requested Records during Fulfillment

When fulfilling a request, you can now use the **Other Requested Record(s)** field to specify Medical Records that were called out in the Request Letter but **NOT** flagged during **Logging**.

This change means you can identify requested and retrieved documents without sending the request "backward" via the **Resubmit to Logging** command.

For example:



1. The **Emergency Room Report** was selected as the only **Requested Record Type** during **Logging**.

2. After opening the request for **Fulfillment**, you notice that the Request Letter also asked for <u>Billing Statements</u>.

3. Attach both the Emergency Room Report and Billing Statement to the request.

4. In the **Other Requested Record(s)** field, type <u>Billing Statements</u>.

5. Select the **Retrieved** checkbox for the Emergency Room Report and Billing Statement.

6. To identify more "un-flagged" **Record Types**, click the **+** button to add a new **Other Requested Record(s)** row.

7. Submit the request.

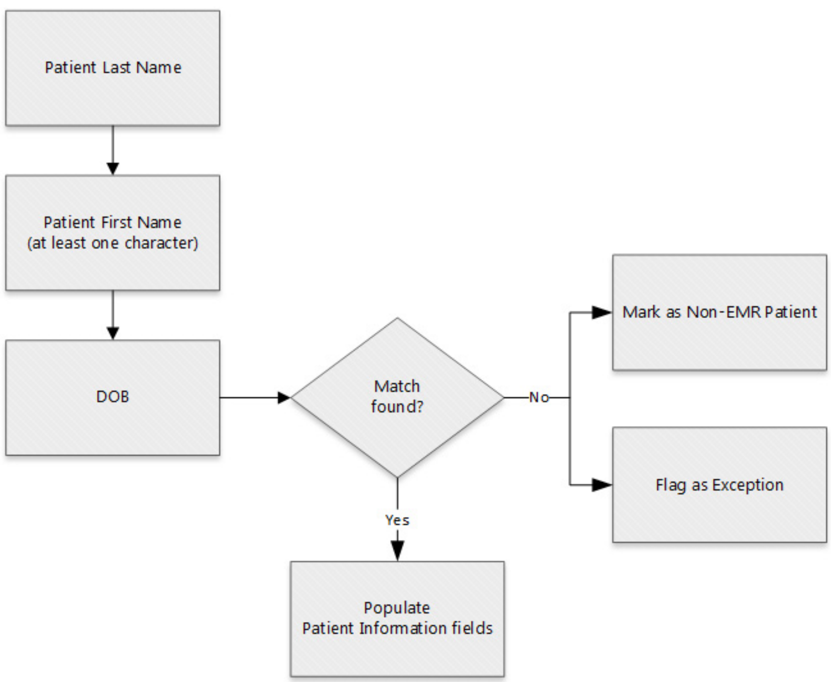
> You can type the name of "standard" **Record Types**, like <u>Abstract Summary</u> or <u>Admission Sheet</u>, in an **Other Requested Record(s)** field.
>
> You can also add a "custom" description that isn't part of the "regular" list of **Record Types**.

Patient Lookup

This new option looks for matches between a new **HealthSource Clarity** request and patient data provided to Ciox Health by a facility. When a match is found, we can import the facility data to the request.

This option provides two advantages:

- Less manual data entry and better accuracy for complex patient identification values, like **MRN**, **EMRN**, **Account #**, or **SSN**.
- Identifies patients who are not present in the EMR system, so the person who fulfills the request doesn't waste time looking for their Medical Records there.



The **Patient Lookup** option is **ONLY** available at sites which have provided us with patient data **AND** which are configured to run lookups against that data.

Other sites will not be affected by this new feature.

Search rules

The **Patient Lookup** follows these rules when trying to locate a match in the data provided to us by the facility:

Value	Rule
Last Name	Exact match only
First Name	First character match
DOB	Exact match only DOB may be optional during **Logging**, but is required during **Fulfillment**.

If you add other **Patient Information** (such as the **SSN**) to the request before the lookup runs, those “extra” values will be included in the search.

The lookup results will only include patients whose data exactly matches those extra values, in addition to meeting the **Name** and **DOB** rules.

Patient Lookup — individual request

The **Patient Lookup** feature works in both **Logging** and **Fulfillment**, but will most often be used when logging a request.

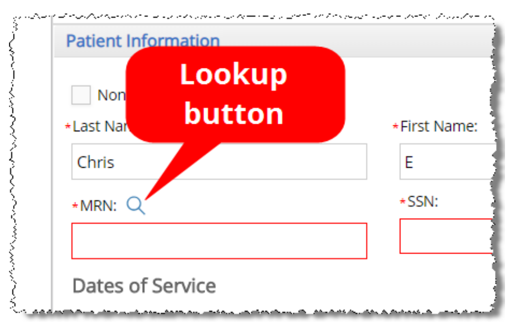
1. In the **Patient Information** section, look at these three fields:

   1.1 **Last Name**

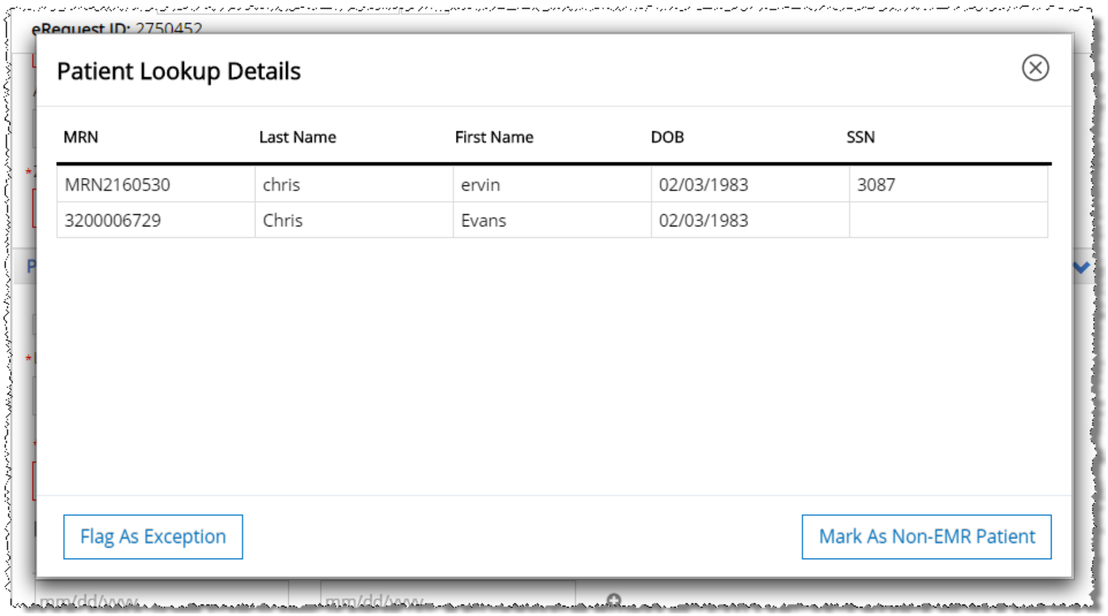
   1.2 **First Name**

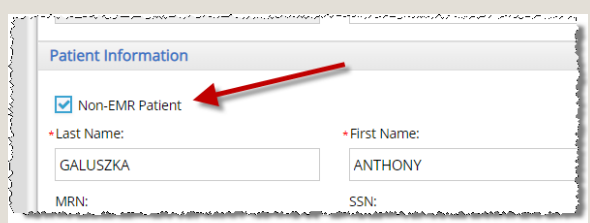
   1.3 **DOB** — can be optional during **Logging**, but is **ALWAYS** required in **Fulfillment**.

2. Are all three fields already filled with data?

<table>
<tr><td>YES</td><td>Find and click the Lookup button.</td><td>
</td></tr>
<tr><td>NO</td><td colspan="2">Enter all three values and press TAB or otherwise leave the DOB field.</td></tr>
</table>

3. The **Patient Lookup Details** popup appears.



Option	What happens next?
Select the patient match (if any)	The values for the selected patient auto-fill the request.
Mark As Non-EMR Patient	1. The **Patient Details Lookup** popup closes. 2. The **Non-EMR Patient** checkbox in the **Patient Information** section will be selected. 
Flag As Exception Not available if you created the request manually.	1. The **Flag As Exception** popup replaces **Patient Lookup Details**. 2. Patient Lookup Failed is the **Exception Reason** by default. This reason was added in **v1.5** for sites that use **Patient Lookup**.
Perform the lookup again	Close popup and change **Last Name**, **First Name**, and / or **DOB**.

![CIOX HEALTH logo]

Patient Lookup — Pull List

The **Patient Lookup** tool also works when creating child requests from a Pull List.

The same rules apply to child requests and individual requests (page 43):

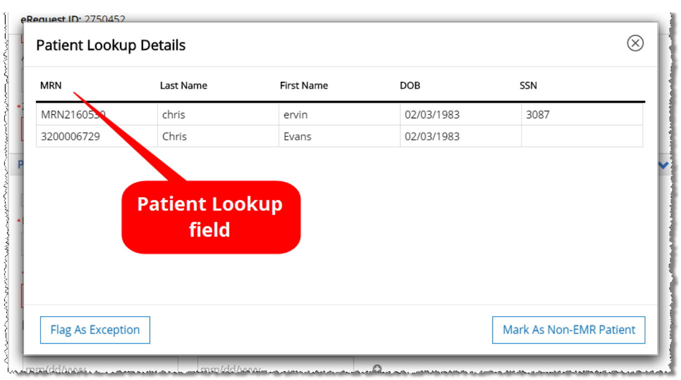
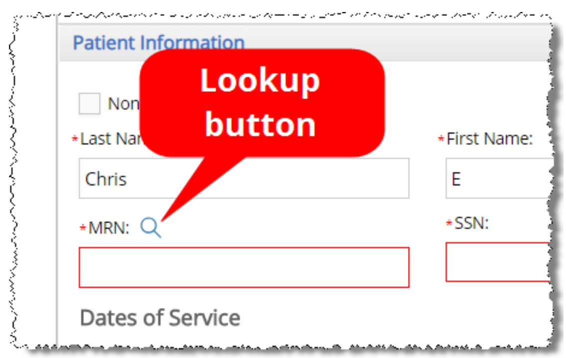
- **Last Name**, **First Name**, and **DOB** must be entered.
- If the required values are "pulled" from the request automatically, you must click the **Lookup** button to find possible matches. Unlike individual requests, this button is always visible, even when it is not active because you haven't entered enough information.
- If you enter the required values manually, the **Lookup** automatically runs after you leave the **DOB** field.
- You can mark a patient as **Non-EMR** if no matches are found.
- The **Flag as Exception** option is **NOT** available for child requests.

Patient Lookup configuration

The **Patient Lookup** option is configured in the **Platform Admin** tool, **NOT** in **HealthSource Clarity**.

During configuration, any of these fields can be defined as the **Patient Lookup** field:

- EMRN
- MRN
- Patient Account / Control #
- SSN

<table>
<tr><th colspan="2">Where will you see the Patient Lookup field in HealthSource Clarity?</th></tr>
<tr><th>Patient Lookup Details window</th><th>Logging and Fulfillment screens</th></tr>
<tr><td>Label for the left-most column.

</td><td>The “anchor” for the manual Lookup button, which is displayed after you enter the Last Name, First Name, and DOB values.

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

Make DOB field optional during Logging

By default, most sites require a **DOB** value for the patient during Logging.

A **Group Administrator** can make this field optional for **Logging**. It will always be required before a request can be submitted from **Fulfillment**.

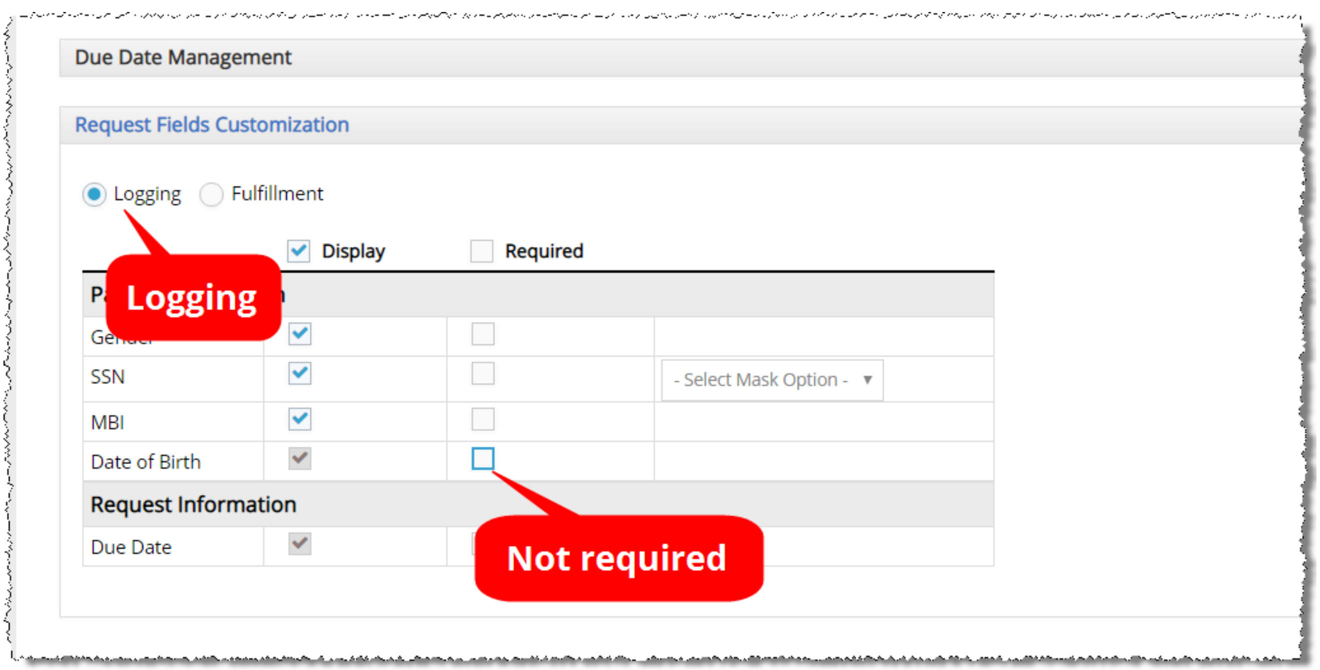
Changing whether the **DOB** is required during **Logging** determines whether the **DOB** value will always be used for a **Patient Lookup**.

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

2. Open the **Site Preferences** page for the site.

3. Open the **Request Fields Customization** section.

4. Select **Logging** and disable the **Required** checkbox for **Date of Birth**.



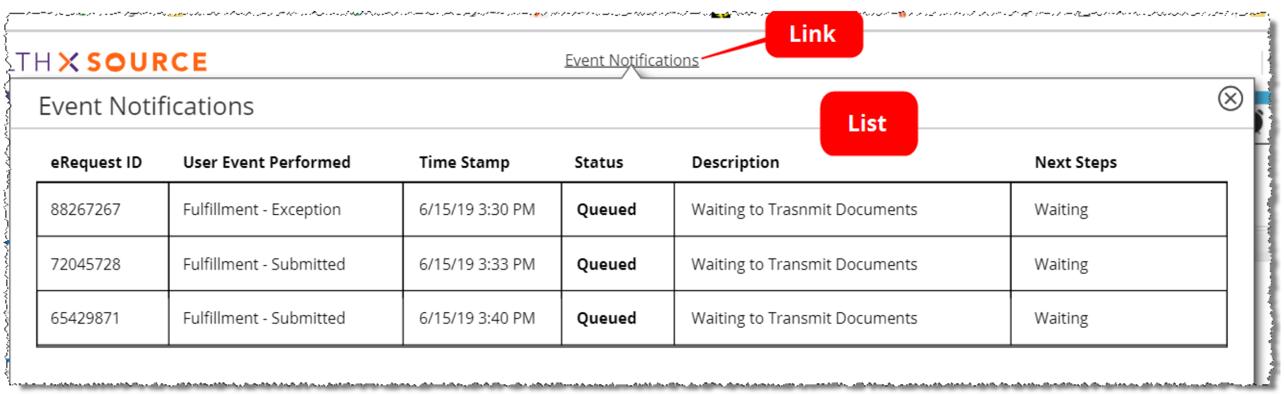
EVENT NOTIFICATIONS

The new **Event Notifications** link allows you to see interruptions or delays affecting requests for which you were the last user:

- Document Transmission Failure
- Document Transmission in progress
- Document Transmission Queued

The **Event Notifications** link appears only when requests are currently being affected by a transmission interruption or delay. It does **NOT** appear if there are no current active notifications. The link will be displayed at the top center of the **HealthSource Clarity** screen.

Click the **Event Notifications** link to see details about the affected requests.



eRequest ID	User Event Performed	Time Stamp	Status	Description	Next Steps
88267267	Fulfillment - Exception	6/15/19 3:30 PM	**Queued**	Waiting to Trasnmit Documents	Waiting
72045728	Fulfillment - Submitted	6/15/19 3:33 PM	**Queued**	Waiting to Transmit Documents	Waiting
65429871	Fulfillment - Submitted	6/15/19 3:40 PM	**Queued**	Waiting to Transmit Documents	Waiting

No notifications for existing requests

We will **NOT** generate notifications for requests that experienced any of the “trigger” events before the release of **v1.5**.

PULL LIST ENHANCEMENTS

We've made several changes to how Pull List child requests are created, tracked, and worked:

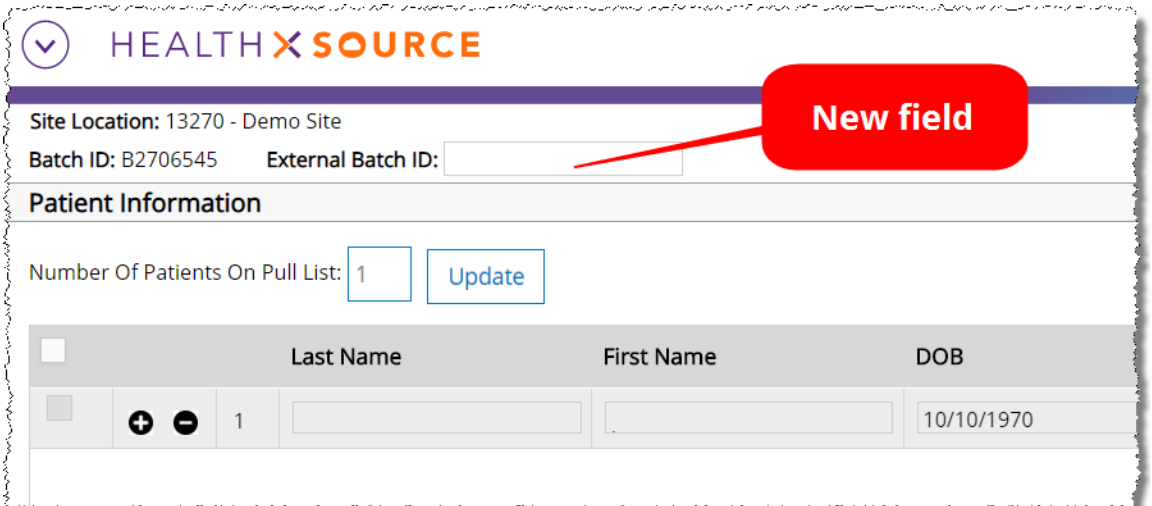
- Enter External Batch ID for Pull Lists
- Update E-Request Letter when child sent back to logging
- Maintain original requester during Fulfillment of child requests

Enter External Batch ID for Pull Lists

Enter External Batch ID for Pull Lists

The **Pull List** screen now provides a field for entering an **External Batch ID**.

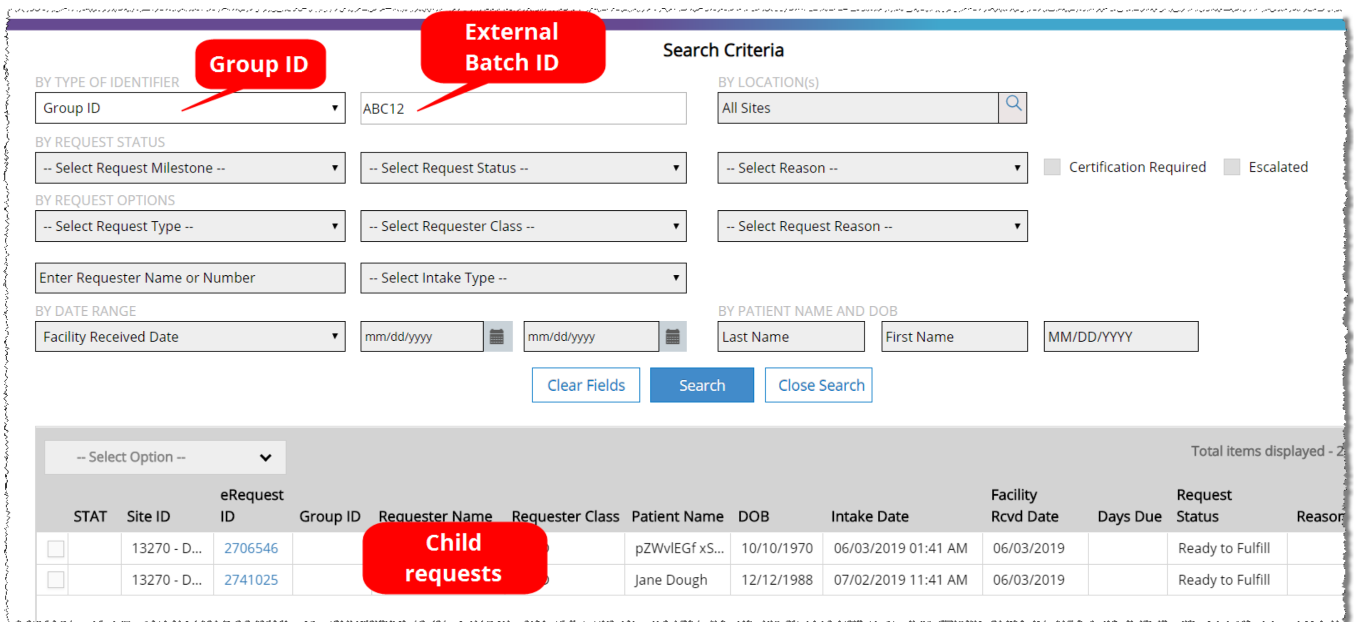
Some customers provide this type of batch-level identification value on their Pull Lists. Capturing it gives us a better traceability between what the customer asked for and the child requests.



- The **External Batch ID** is optional for all Pull Lists.
- 35 character maximum.
- Alphanumeric characters only, no dashes or other special characters allowed.
- Can be edited only on the **Pull List** screen, not after you finish logging the Pull List.

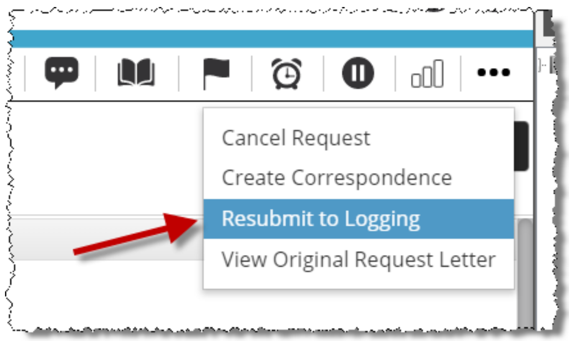
Search for child requests by External Batch ID

1. On the **Request Search** page, select Group ID in the **By Type of Identifier** field.
2. Enter the **External Batch ID** value.
3. Run the search.
4. All child requests associated with the Pull List will be listed in the **Search Results**.



Update E-Request Letter when child sent back to logging

IF a child request is resubmitted to **Logging**;



AND you change any of these values during the "revised" logging:

- Patient Name
- DOB
- Dates of Service
- Required HEDIS measures (if any)

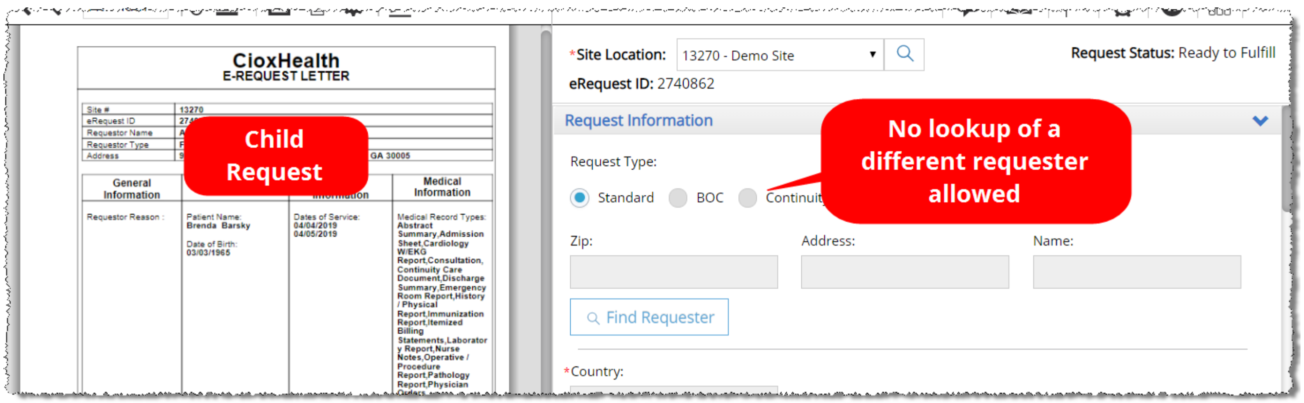
THEN the E-Request Letter for that child will be modified to reflect your changes. These changes will be visible when the child is opened for **Fulfillment**.

Previously, the E-Request Letter was "frozen" after the child was originally submitted.

Maintain original requester during Fulfillment of child requests

You can no longer look up and select a different requester during the **Fulfillment** of child requests.

The requester search fields are disabled for children.



REQUESTER SELECTION AND ADDRESS CHANGES

v1.5 does a better job of identifying requester information for three types of requests:

- **DDS** (Disability)
- **Patient** request with military address
- **Continuity of Care** requests

See pages 55 through 58 for details.

Improved selection of DDS requester

If **HealthSource Clarity** can interpret a **DDS** bar code on a Request Letter, the requester will automatically be selected when you open the request for **Logging**.

You'll see an **Approved** flag, indicating that the automatic process worked properly:

The **Find Requester** button will **NOT** be available.

Wrong selection?

If the automatic selection was wrong:

1. Select a different **Request Type** (anything except **DDS**).
2. The automatically selected requester information is cleared.
3. Select **DDS** as the **Request Type** again.
4. Look up the requester using the DDS fields:

    4.1 **DDS Bar Code Available**

    4.2 **DDS Ship to State**

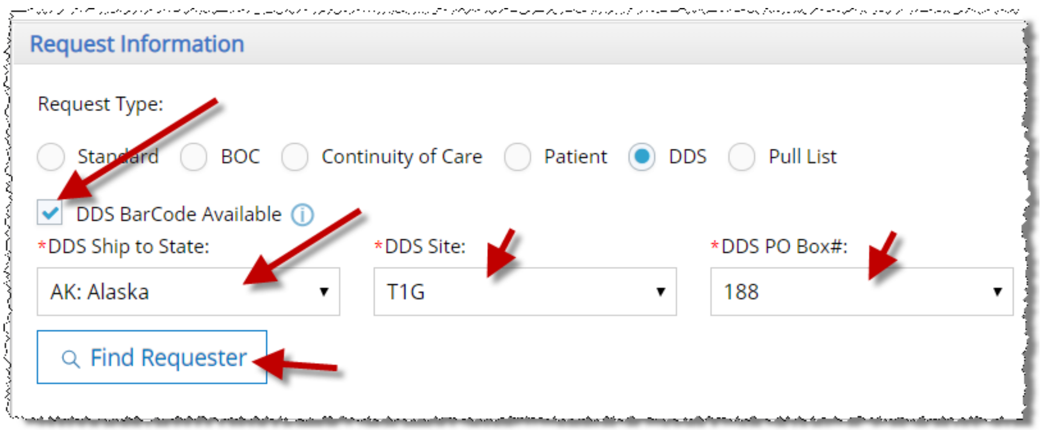
    4.3 **DDS Site**

    4.4 **DDS PO Box #**

Automatic DDS selection not possible?

If the **DDS** bar code was **NOT** present on the Request Letter or could **NOT** be automatically interpreted, specify these values manually and use the **Find Requester** command:

- DDS Bar Code Available
- DDS Ship to State
- DDS Site
- DDS PO Box #



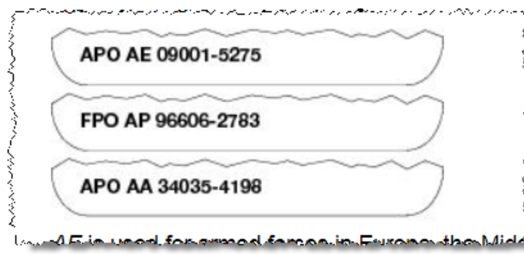
After **HealthSource Clarity** selects the matching requester, you'll see the **Approved** flag:

Military address support

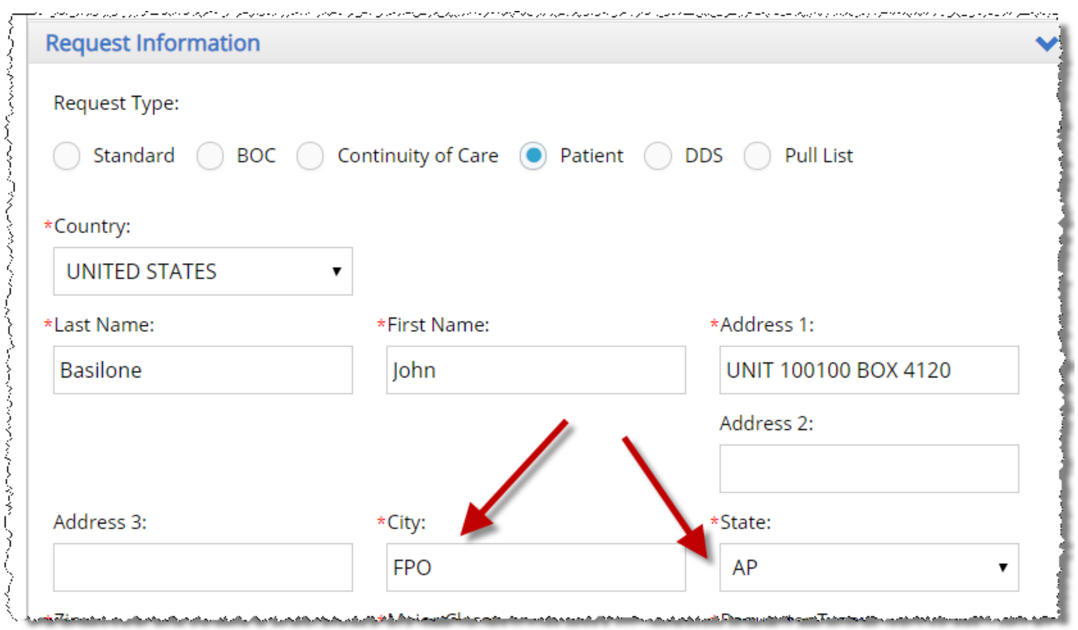
HealthSource Clarity can now automatically identify military addresses for **Patient** requests.

These addresses contain specific character combinations in the **City** and **State** positions:

City	APO or FPO
State	AE, AA, or AP



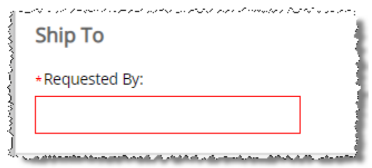
If not found automatically, you can type or select these values in the **City** and **State** fields for a **Patient** request.



You **CANNOT** select AE, AA, or AP as the **State** for the **Ship To** address when the R**equest Type** is anything other than **Patient**.

Ciox Health no longer used as Ship To for ConCare requests

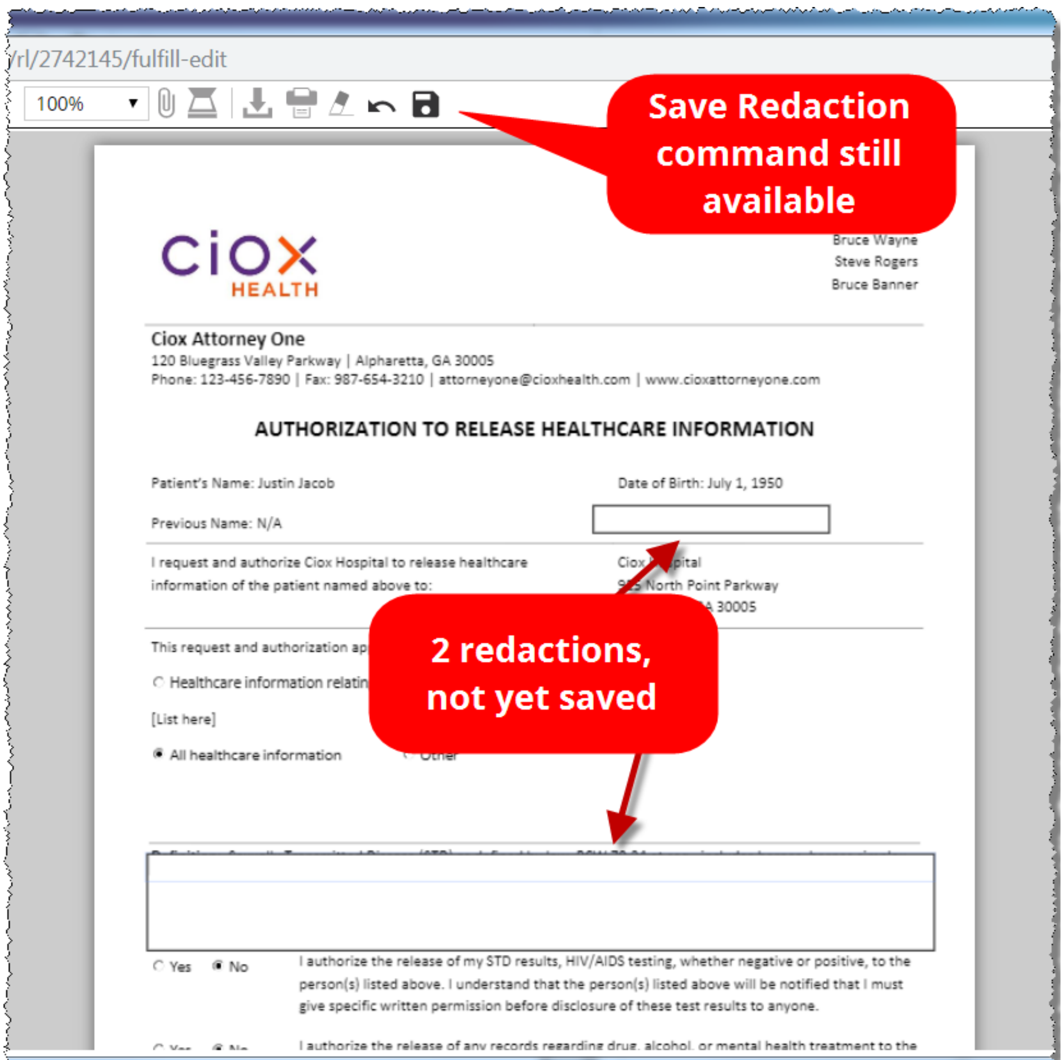
We no longer auto-fill the **Ship To** fields with the **Ciox Health** name and address for **Continuity of Care** requests. The fields displayed in the **Ship To** section depend on the **Requester** and **Delivery Method**.

<table>
<tr><th>Con-Care Requester</th><th>Delivery Method</th><th>Ship To fields</th></tr>
<tr><td rowspan="6">Default for the State</td><td>CD</td><td rowspan="6">Hidden except for Requested By
</td></tr>
<tr><td>DVD</td></tr>
<tr><td>eDelivery</td></tr>
<tr><td>Faxed</td></tr>
<tr><td>Flash Drive</td></tr>
<tr><td>Walk In</td></tr>
<tr><td rowspan="2">Default for the State</td><td>Electronic</td><td rowspan="2">All displayed, all blank
</td></tr>
<tr><td>Mail</td></tr>
<tr><td>NOT default for the State</td><td>Any</td><td>All displayed, all blank
</td></tr>
</table>

Redact multiple parts of a Request Letter before saving

You can now redact more than one section of a Request Letter before clicking the **Save Redaction** button. This means that you can hide several parts of a page **AND** that you can hide sections of different pages without having to save each one.

Previously, you were forced to save each redaction individually before you could redact another part of the Request Letter.



Combined "disc" Delivery Method choices

We have combined the "disc" options into a single choice for the **Delivery Method** field:

- CD
- DVD
- Flash Drive

The **Delivery Method** can be set during either **Logging** or **Fulfillment**.

This change simplifies the data entry process. It also makes it easier to generate the correct delivery and invoicing information during back-end processing.

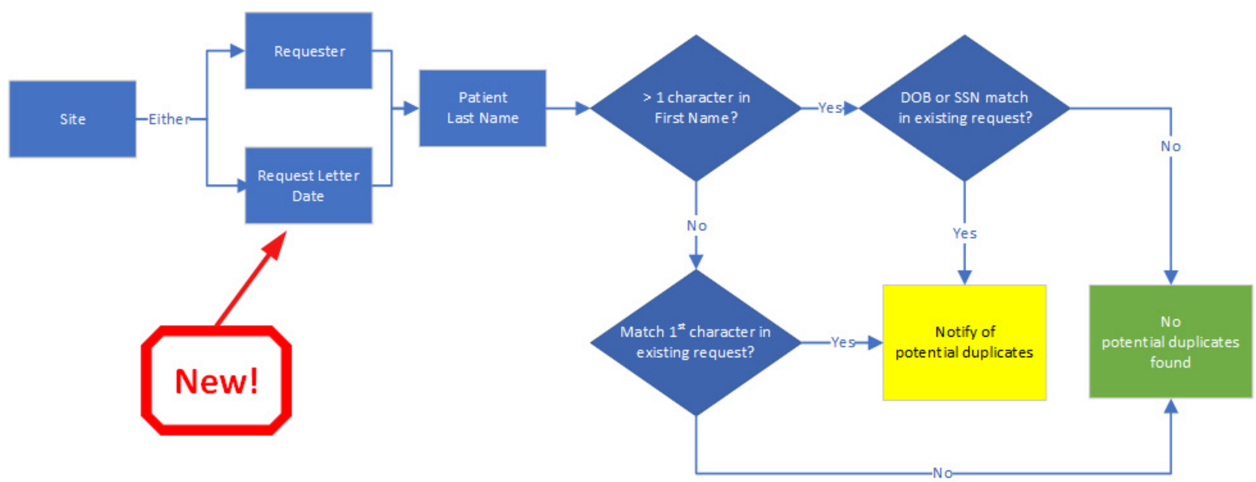
Duplicate Request Detection Enhancements

We're continuing our efforts to prevent wasteful work on duplicate requests:

Check the Request Letter Date

We now look at the **Request Letter Date** as part of the duplicate request checking process. If this date **OR** the requester, plus other details, matches an existing request, the new request will be flagged as a potential duplicate.

This change only affects Request Letters that are received by email, fax, or uploaded, **NOT** those which are scanned.



Check un-logged requests

We're now comparing new requests to those that have already been created but which have not yet been worked on. Previously, we only checked new requests against those that had been saved or submitted from **Logging**. For example:

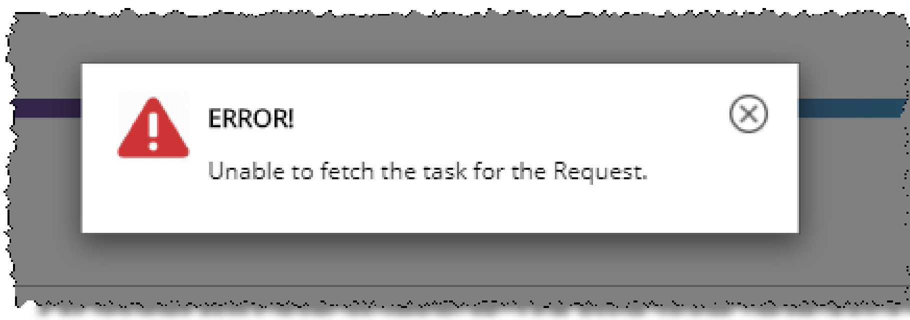
- We receive three copies of the same Request Letter on the same day.
- **BEFORE** the release of **v1.5**, we would not be notified of a possible duplicate until the second request was opened for **Logging**.
- **AFTER** the release of **v1.5**, we'll get a notification as soon as the second Request Letter is analyzed, long before a **CSR** opens any of the three requests.

OTHER CHANGES

- Automatic presentation of valid requests
- External Manager control of escalations
- Improved password security
- Warning when switching Request Types

Automatic presentation of valid requests

We've eliminated a major cause of the **Unable to fetch the task for the Request** error message. This error forced users to return to the **Search Results** or **My Dashboard** or **My Work Queue**, which was inefficient and annoying.



After the release of **v1.5**, we'll "skip" any requests that can't be loaded after you use any of these commands:

- **Log Request** from **My Dashboard**
- **Log Request** from **My Dashboard**
- **Submit and Next** from **Logging** screen
- **Submit and Next** from **Fulfillment** screen

If we can't load the next request that "should" be available for you to work, we'll simply go the next one and so on until we find one that can be loaded. The support team will automatically be notified of the problematic request(s).

You may still see this error message due to other causes, but it will be much less frequent.

External Manager control of escalations

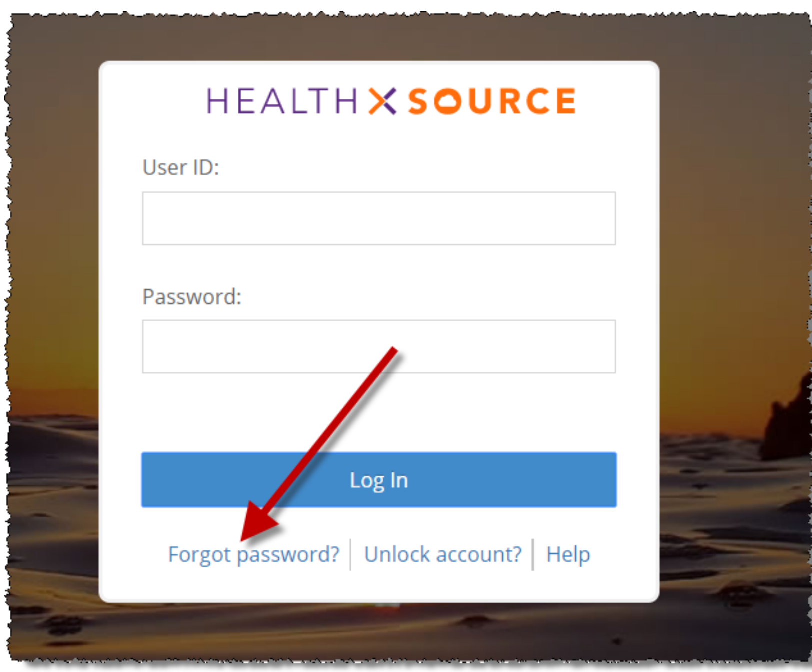
Users with the **External Manager** role can now escalate requests and remove escalations.

External Managers, often HIMD representatives, did not previously have the ability to control escalations.

Improved password security

We've addressed a known issue that allowed some users with expired passwords to continue logging into **HealthSource Clarity**.

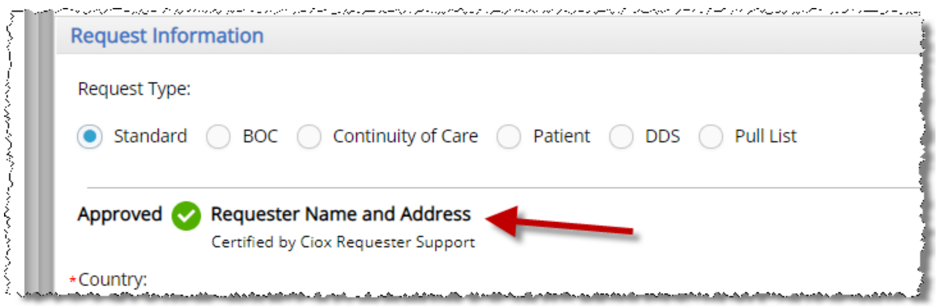
ANY user with an expired password will be prompted to reset it via the **Forgot Password?** link on the **Login** page.



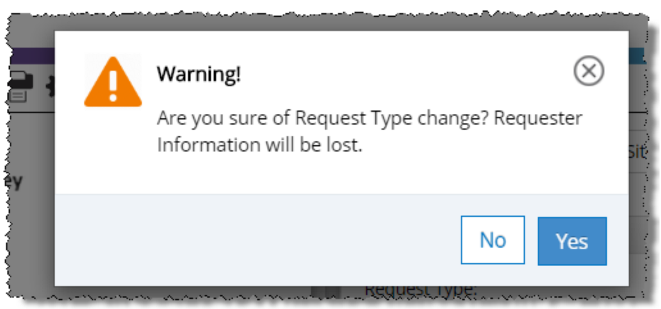
Warning when switching Request Types

IF you switch from one **Request Type** to another during the **Logging**, **Fulfillment**, or **New Requester** steps;

AND the **Requester Name and Address** are **Certified by Ciox Requester Support**;



THEN you'll be prompted to confirm the change, since switching the **Request Type** clears out the **Requester Information** that is already populated.



This change lowers the chance of accidentally deleting data, which leads to repetitive work.