HealthSource Clarity

v1.6.2 Release Notes

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Document History

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HealthSource Clarity v1.6.2 Release Notes

You do **NOT** need to update your **TrayApp** to use this new version.

UPDATED REQUEST SEARCH SCREEN

The latest changes to the **Request Search** screen make it easier to find exactly the kind of requests you need to see.

See the following sections for information on the new appearance of the **Request Search** screen:

- Simplified layout

- Less frequently used search fields are hidden by default

- Quickly hide search criteria for more viewing space

- Reset Criteria replaces Clear Fields command

- Export Search Results to Excel

Simplified layout

The **Search Criteria** fields are now organized in columns, rather than being smashed together to save space.

Main fields	
Displayed by default	
Unique Identifier	Look for a specific request identification value.
Date Range	See page 17 for information on the changes to the date search options.
Sites	Find requests assigned to a specific site or group of sites.
Accessed by	See page 20 for details on this new option.
Request Progress	Find requests by their position in the workflow. See page 12 for guidance on choosing multiple values in each field.
Request Characteristics	Search by **Request Type and Requester Class** or **Primary Reason for Request**. See page 12 for guidance on choosing multiple values in each field.
Additional fields You must click **Show All Search Criteria** (page 6) to see these fields.	
Patient Information	We've added **Social Security Number**, **MRN**, and **Patient Account Number** as search options. See page 25 for details.
Escalation Parameters	Search by the severity of the escalation and / or the **Escalation Reason**. See page 23 for more information.
Additional Request Details	• Certification — see page 26. • STAT requests — see page 28. • Message Response Required — see page 44. • Requester Name / Number • Request Intake Type
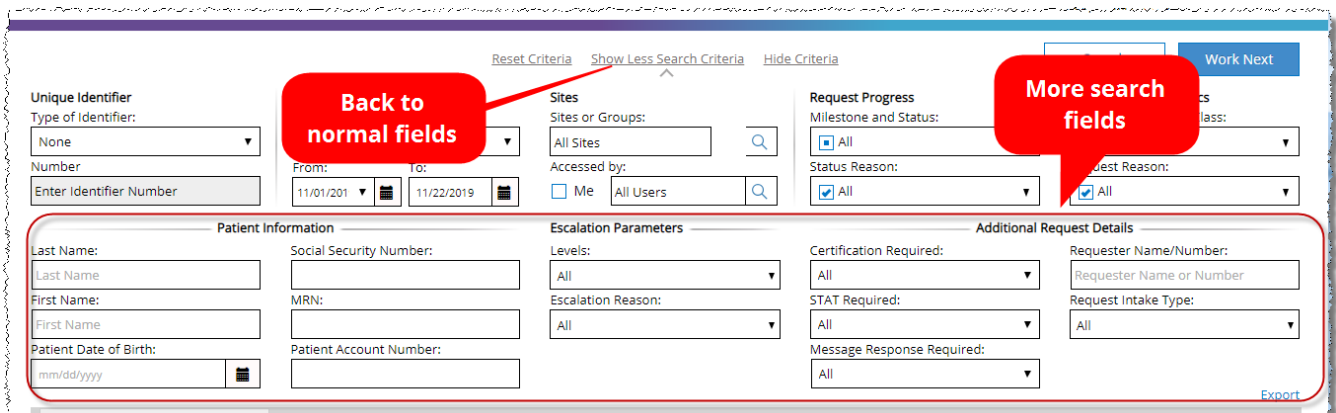
Less frequently used search fields are hidden by default

By default, we show the most commonly used **Search Criteria** and hide the more specialized fields. To see all your search choices, click **Show All Search Criteria**.
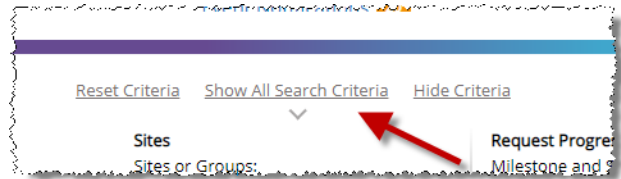
You can then specify:

- **Patient Information**

- **Escalation Parameters**

- **Certification Required**

- **STAT Required**

- **Message Response Required**

- **Requester Name / Number**

- **Request Intake Type**

To go back to the default view with fewer fields, click **Show Less Search Criteria**.

Quickly hide search criteria for more viewing space

Clicking **Hide Criteria** makes more room for the **Search Results**.
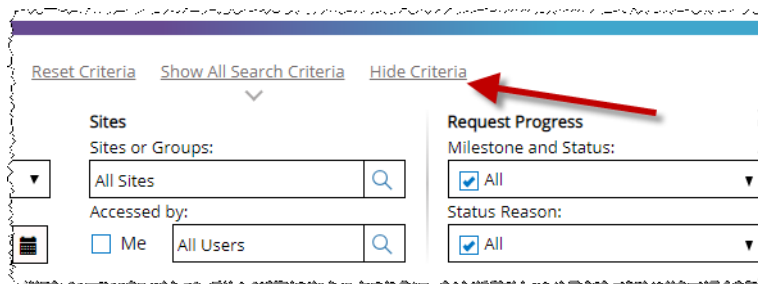
The **Search Criteria** fields "roll up" so you can see more results on a single page.
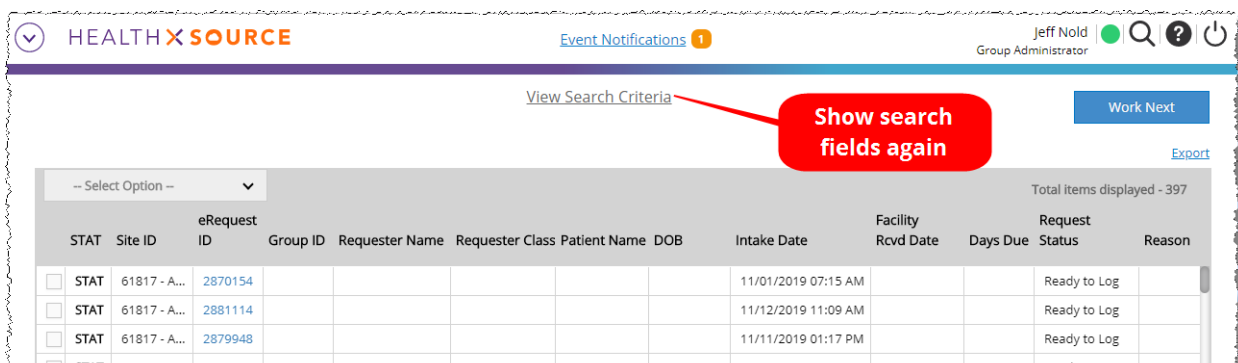
To see the search fields again, click the **View Search Criteria** link.

Reset Criteria replaces Clear Fields command

To clear out your current **Search Criteria** selections, click **Reset Criteria**.
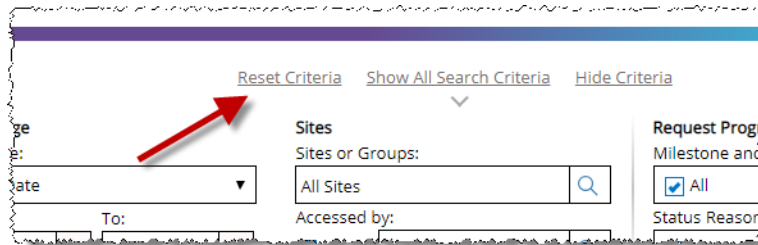
This link performs the same function as the **Clear Fields** command in previous versions of **HealthSource Clarity**.

Export Search Results to Excel

The new **Export** command sends your **Search Results** — and the **Search Criteria** — to an Excel spreadsheet. You can then use Excel commands to manipulate the data.

Export options

When you click the **Export** button, you can choose from three options:
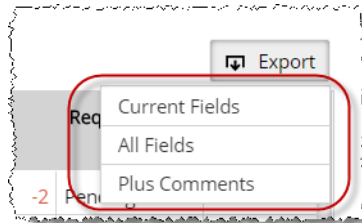
Option	Spreadsheet will contain		
Current Fields	Only the 13 columns displayed in the **Search Results**.		
All Fields	The 13 columns displayed in the **Search Results**, plus:		
	Accessed by User	Escalation by User	Patient Account Number
	Accessed Date/Time	External ROI ID	Request Milestone
	Billable	Intake Type	Request Reason
	Certification Required	Invoice Number	Request Type
	Escalation Level	LOG ID	Resubmit Date/Time*
	Escalation Reason	Patient MRN	Requester Number
	Escalation Date/Time	Patient SSN	
Plus Comments	All columns listed in **All Fields**, plus any **Comments** added to the request.		

* this information will not be available in **v1.6.2**, but the column will still be found in the spreadsheet. A future release will fix this issue.

of results in exported file limited to 1,000

The exported spreadsheet can contain a maximum of 1,000 requests.

Export file name and location

The name of the exported file is **HS_RequestSearch.xlsx**. You cannot give the file a different name before it is downloaded.

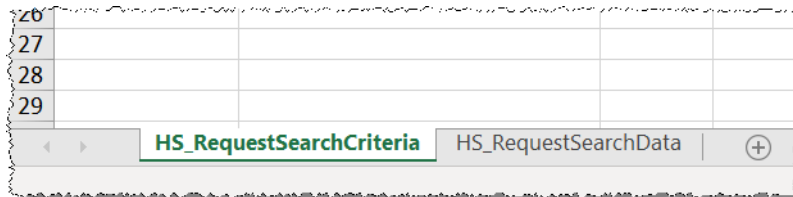It is automatically saved to your specified **Downloads** folder.

Worksheets in XLSX file

The XLSX file contains two sheets:
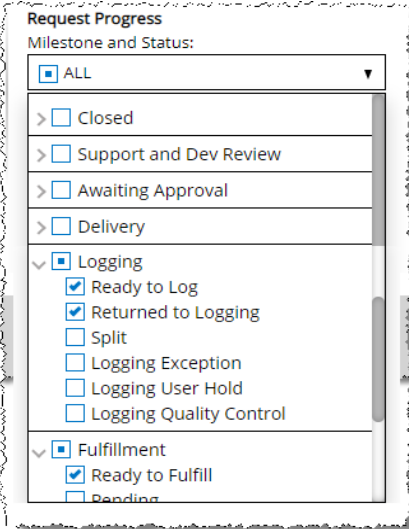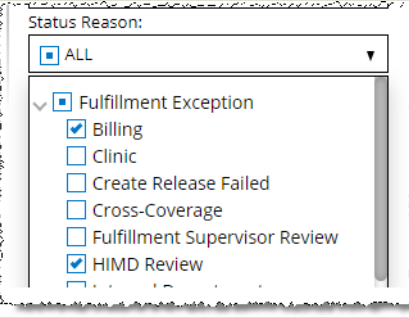
- **HS_RequestSearchCriteria** shows the search parameters you selected.

- **HS_RequestSearchData** shows the actual requests found by the search.
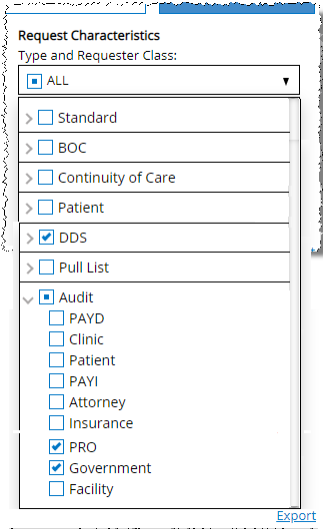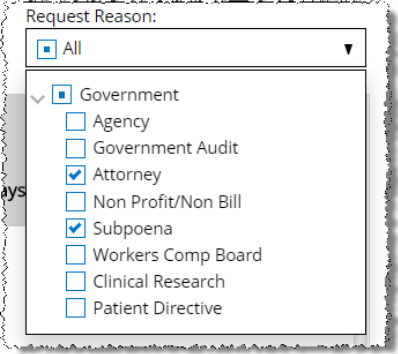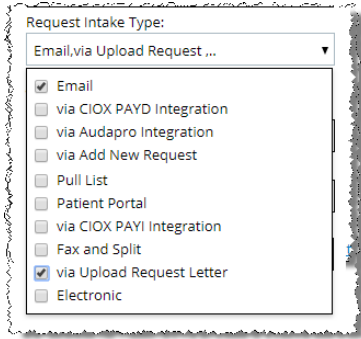
MAKE MULTIPLE CHOICES IN THE SAME SEARCH FIELD

You can now make multiple choices in several **Search Criteria** fields. By default, **ALL** of the choices in each search field are selected.

Previously, multiple selections for the same field were not allowed. You could not search for "more than one but less than all."

Search Field	Description	Example
Milestone and Status	Choose one, more than one, or all of the **Milestone** choices. You can also select specific **Request Status** values for each **Milestone**. In the example, we picked: • **Ready to Log** • **Returned to Logging** • **Ready to Fulfill** See page 38 for information on **Request Status** choices that are no longer available.	
Status Reasons	If you are searching for any of these **Request Status** selections, you can also look for the **Reasons** a request was placed in that condition: • **Logging Exception** • **Logging User Hold** • **Fulfillment Exception** • **Fulfillment User Hold** • **Pending** In the example, we chose **Billing** and **HIMD Review** as the **Fulfillment Exception Reasons**.	

Search Field	Description	Example
Type and Requester Class	Choose one, more than one, or all of the **Request Type** choices. You can also select specific **Requester Class** values within each "parent" **Request Type**. In the example, we picked: • **DDS** and **Audit** as the **Request Types**. • All of the **Requester Class** choices under **DDS** (there is only one). • **Pro** and **Government** as the **Requester Class** choices for **Audit**.	
Request Reason	Based on your **Type and Requester Class** choices, you can specify one or more **Request Reason** values. **Request Reason** = the **Primary Reason for Request**. In the example, because we're looking for **Standard** — **Government** requests, we can specify **Attorney** and **Subpoena** as the **Request Reason**.	
Request Intake Type This field is hidden by default. You must **Show All Search Criteria** (page 6) to see it.	Specify how the request "entered" **HealthSource Clarity**. In the example, we picked **Email** and **Upload Request Letter**.	

How do you see the available choices in a search field?

1. Click anywhere in the search field to see all the available choices.
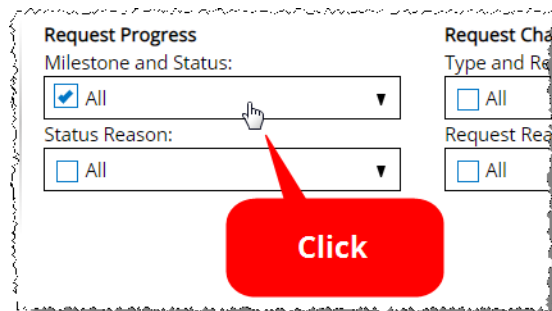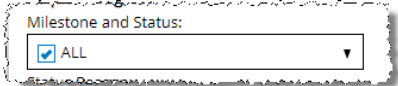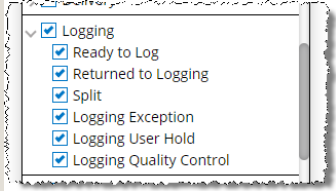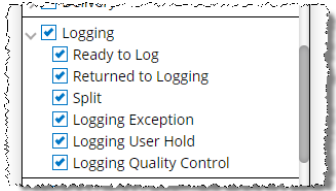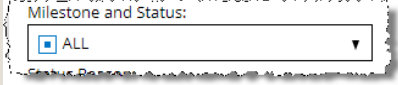
2. If the field contains "parent" and "child" choices, like **Milestone and Status**, click the "parent" row.
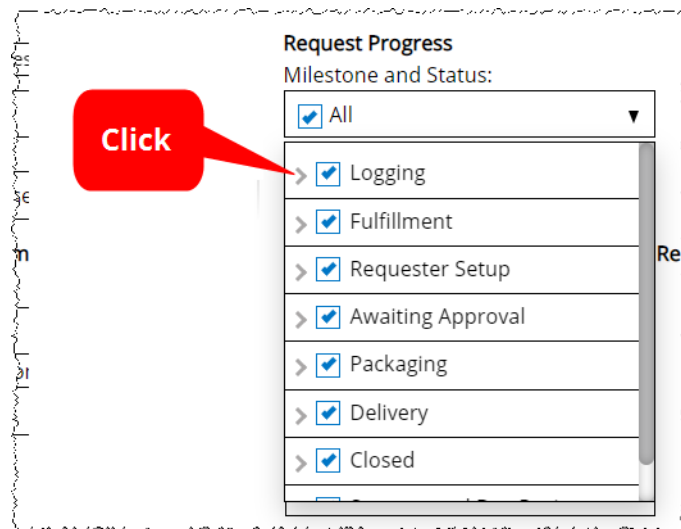
3. The list of "child" choices appears.
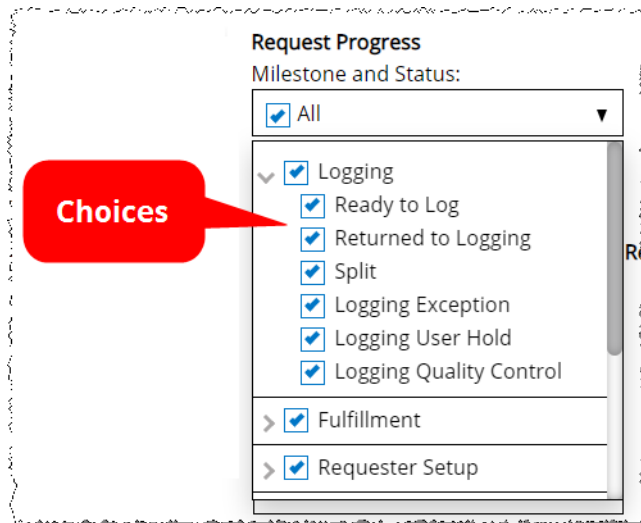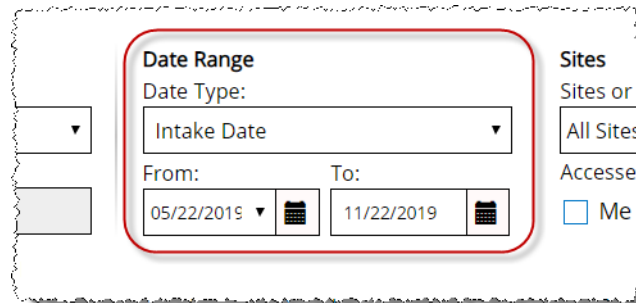
What do the different symbols mean for multiple choice fields?

Symbol	When shown for	Meaning	Example
✔	The entire search field.	All of the items in the field are selected.	
✔	A "parent" choice.	All the "child" items for that choice are selected.	
✔	A "child" choice.	The child is selected.	
■	The entire search field.	Some of the choices in the field are selected.	
■	A "parent" choice.	Some of the "child" items for that choice are selected.	

DATE SEARCH CHANGES

You can now quickly choose "typical" chunks of time for a search — today, yesterday, last 7 days, and month to date. We've also made it easier to look for requests that are due within a specific time frame.

See these sections for details:

- Standardized date range choices

- Changes to Days Until Due search option

Standardized date range choices

IF you choose any of these **Date Type** options:

- Accessed by Date (new, see)

- Due Date

- Facility Received Date

- Intake Date
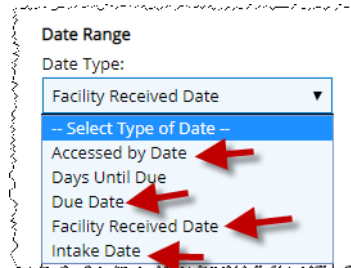
THEN you can choose new pre-defined options in the **From** field:

Option	Definition
Today	Since 12AM on the current day.
Yesterday	12AM to 12PM on the previous calendar day. Not adjusted for business days.
Last 7 Days	Since 12AM on the date 7 days previous. Includes the current day.
Month to Date	Since 12AM on the first day of the current month to now.
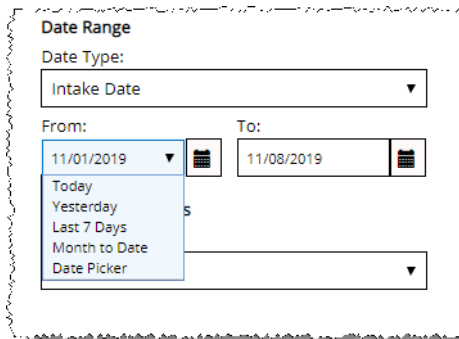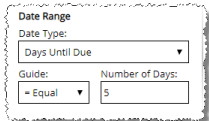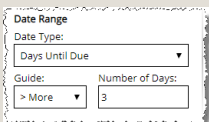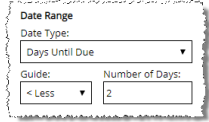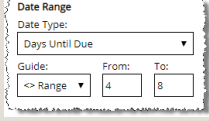
You can still select a specific **From** and **To** date (**Date Picker**).

All start and stop times are based on Eastern United States time. They are **NOT** adjusted for your local time zone.

Changes to Days Until Due search option
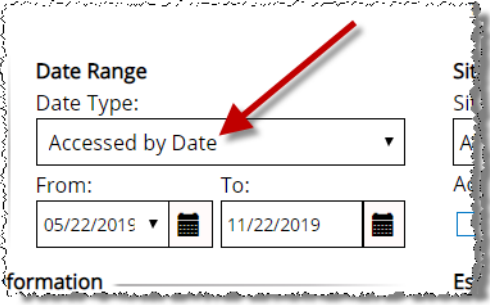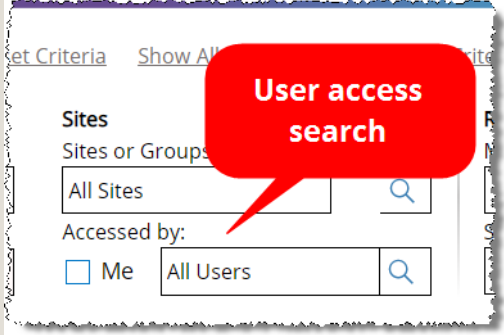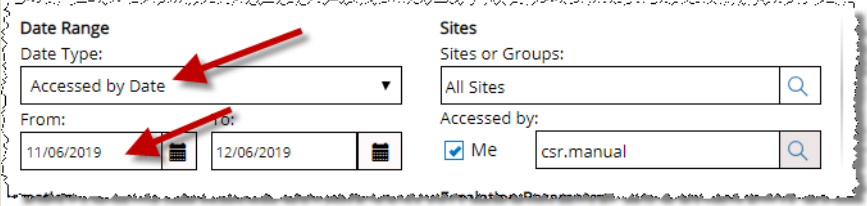
To locate requests based on the time remaining before they are due to be delivered:

1. Select <u>Days Until Due</u> in the **Date Type** field.

2. Choose the appropriate **Guide** option.

3. Enter the **Number of Days** or **From** / **To** values.

Guide selection	How are days specified	Example
= Equal 	Enter the **Number of Days**. 3 digit maximum.	**Number of Days** is 5 finds requests due exactly 5 days from today. It will **NOT** find requests: • due in less than 5 days; • due in more than 5 days; • with no **Due Date**.
> More 	Enter the **Number of Days**. 3 digit maximum.	**Number of Days** is 3 finds requests due 3 or more days from today. It will **NOT** find requests: • due today, in 1 day, or in 2 days; • with no **Due Date**.
< Less 	Enter the **Number of Days**. 3 digit maximum.	**Number of Days** is 2 finds requests due today, tomorrow (1 day), or the day after tomorrow (2 days). It will **NOT** find requests: • due 3 or more days from today; • with no **Due Date**.
<> Range 	Enter a **From** and **To** value. 3 digit maximum in each field.	**From** = 7 **To** = 14 Finds requests due during the next calendar week.

SEARCH BY USER ACCESS
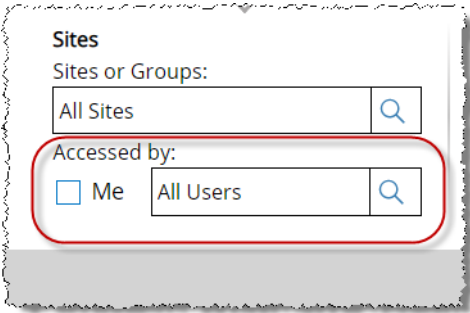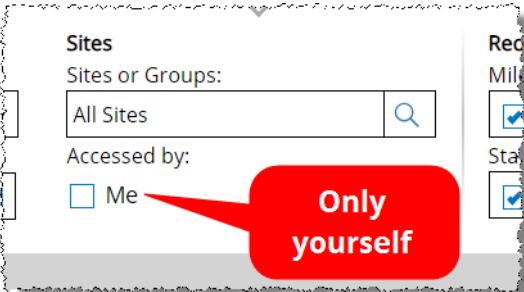
Need to find a request you worked on yesterday, but can't remember any details about it? Need to know which requests John Dough handled last Thursday? Two new search options let you find those kind of requests:

Accessed by Date	The **Date Type** field now offers an <u>Accessed by Date</u> option. Use this choice, in combination with the **From** and **To** fields, to find requests that were opened in a specific date range. For example, you could search for all requests accessed yesterday.	
Accessed by	**Accessed by** finds requests that were opened by a user or multiple users. **Me**: Finds requests you worked on. You can't choose anyone else if you do this. To find requests that other users worked on, click the **Magnifying Glass** button. The **Select User(s)** window lets you pick any users at the site(s) to which you have access.	

Whether you choose **Me** or pick other users:

• the **Date Type** field automatically changes to <u>Accessed by Date</u>;

• the **From** field is set to one month ago. You can change the date range.

Available to specific user roles

The Accessed by Date option for a **Date Range** search is available to everyone.

The options in the **Accessed by** field vary by user role:

Can search for requests accessed by other users	Can only find requests accessed by themselves
• Client Service Representative • Internal Management • External Management • Internal Operations • External Operations • Logger Centralized Supervisor • New Requester • Business Office • Account Management • Group Administrator • Ciox Executive • New Requester 	• Customer Service • Logger Centralized • Electronic Integration • External Customer

What does "access" mean?

"Access" means that a user **OPENED** the request. The user did **NOT** need to change, save, or submit it.

Even if a user opened a request and then logged out of **HealthSource Clarity** without doing anything else, that request was accessed.

Combine the Accessed by Date and Accessed by searches

The two "User Access" search options can be used independently or together. For example, you can:

- Find all requests opened by anyone in the last week;

- Find all requests opened by Jane Doe, regardless of date;

- Find all requests opened by Jane Doe in the last week;

- Find all requests opened by Jane Doe and John Dough yesterday.
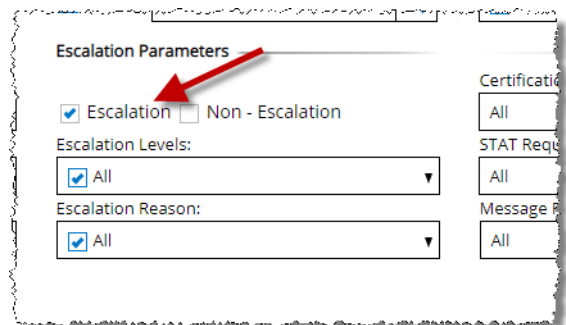
SEARCH BY ESCALATION PARAMETERS
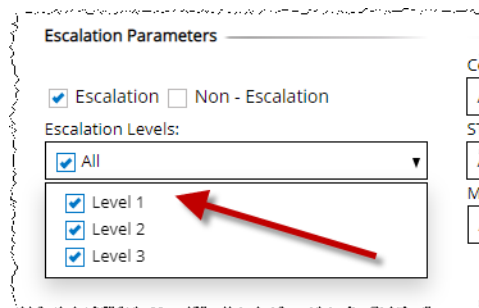
	Escalation is a site-level setting that is disabled by default.
	If your site(s) do not support **Escalation**, this search option will still be available, but serves no purpose.
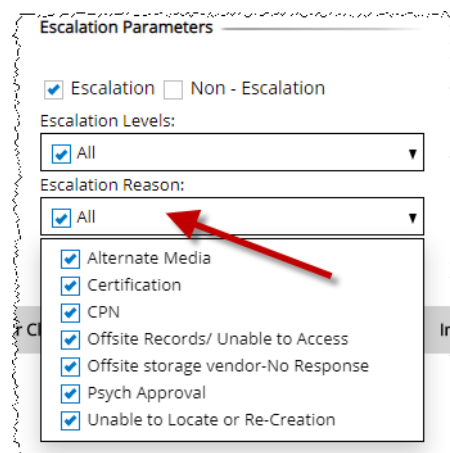
1. Select the **Escalation** checkbox.

2. In the **Escalation Levels** field, you can select any or all of the severity levels — 1, 2, or 3. By default, a search looks for requests regardless of escalation.
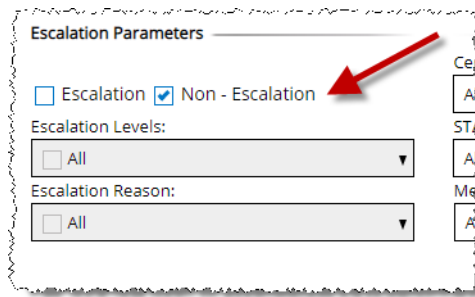
3. You can also specify one or more of the **Escalation Reason** choices.

Escalation Levels and **Escalation Reason** can be used independently of each other. You can search for a level without specifying a reason and vice-versa.

Search for requests that have not been escalated

To find only requests that have **NOT** been escalated, select the **Non-Escalation** checkbox.

Hidden by default

The **Escalation Parameters** are hidden by default. You must **Show All Search Criteria** (page 6) to see them.

SEARCH BY SOCIAL SECURITY NUMBER, MRN, OR ACCOUNT NUMBER

You can now search for a request based on these patient ID values:

• **Social Security Number**

• **MRN**

• **Patient Account Number**

These values could not previously be used for searching.

Exact matches only!

These new fields do **NOT** support partial or wild card searches.

For example, searching for 123 as the **MRN** will return no results, even if dozens of requests include that sequence in the **MRN** field.

Hidden by default

The **Patient Information** search fields are hidden by default. You must **Show All Search Criteria** ([page 6](#)) to see them.

SEARCH BY ADDITIONAL REQUEST DETAILS

The **Additional Request Details** fields are hidden by default. You must **Show All Search Criteria** (page 6) to see them.

In this section, you can add the following conditions to your search:

Search Field	New or changed in v1.6.2?	See page
Certification Required	**YES**	27
STAT Required	**YES**	28
Requester Name / Number	**NO**	N/A No changes to this field.
Request Intake Type	**YES**	29

Search by Certification condition

The **Certification Required** field lets you search for requests that do — or do **NOT** — require certification.

Option	Finds
All	Requests regardless of their **Certification** status.
Yes	Only those requests that need to be certified.
No	Only those requests that do **NOT** need to be certified.
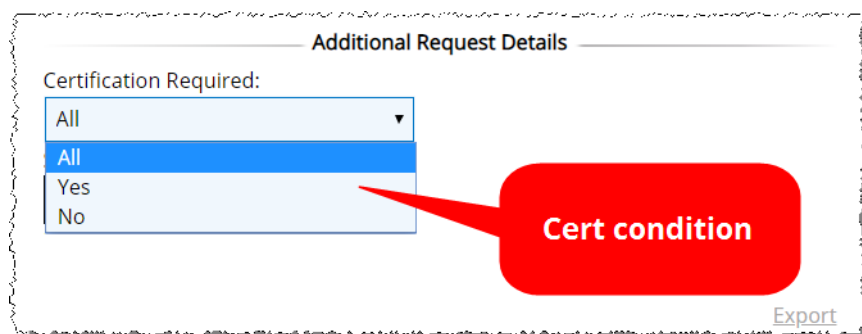
Previously, selecting the **Certification** search option meant that your results included **ONLY** requests that needed to be certified. There was no way to find requests that did **NOT** require certification.

Search for STAT requests

The **STAT Required** field lets you search for requests that are — or are **NOT** — flagged as **STAT**.

Option	Finds
All	Requests regardless of their **STAT** status.
Yes	Only **STAT** requests.
No	Only those requests that are **NOT** flagged as **STAT**.

Previously, you could not use the **STAT** condition to run a search. You could only sort the results so that **STAT** requests were at the top (or bottom) of the list.

Search by Request Intake Type

As described earlier on , you can now select more than one choice in the **Request Intake Type** field.

By default, a search finds requests for all intake types.

Previously, you could only pick one **Intake Type**.

SEARCH CRITERIA AND SEARCH RESULTS RETAINED

Any **Search Criteria** field choices you make are **RETAINED** as long as you are logged in to **HealthSource Clarity**.

In the same way, your **Search Results** are always displayed until you either run a new search or log out and back in.

Your search settings are cleared when you log out of or close the application.

Example

1. You run a search for all **Logging — Ready to Log** requests with an **Intake Date** within the current month.

2. You log four requests and then open **My Holds**.

3. You do **NOT** log out or close the application.

4. When you return to **Request Search**:

   4.1 The **Search Criteria** will still be set for **Logging — Ready to Log** requests received in the current month;

   4.2 The **Search Results** will still be displayed. The four requests that you previously logged, as well as any requests moved to **Fulfillment** by other users, will **NOT** be listed.

CUSTOM WORK LISTS AND THE WORK NEXT COMMAND

By taking advantage of the new **Request Search** options (pages 12 through 30) and the **Work Next** command, you can open exactly the kind of requests you're supposed to work on.

You no longer need to rely on our default priority options, and we won't open a request that someone else is working on and that is therefore useless to you.
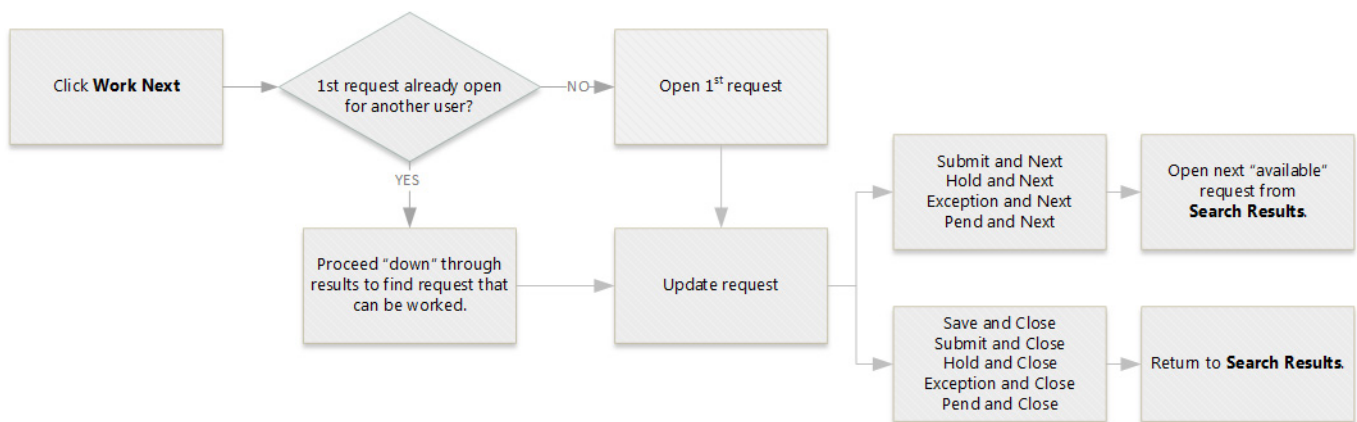
	If you don't run a search, clicking **Work Next** will load the "next available" request, based on our default priorities:
	• STAT
	• Days until Due
	• Oldest (first in — first out)

Making a custom work list for yourself

1. Run a search using any or all of the **Request Statuses** in these **Milestones**:

    1.1 **Logging**

    1.2 **Fulfillment**

> If you choose other **Milestones** and **Request Statuses,** your results may include requests that don't need to be worked on.
>
> The **Search Results** may therefore not act as a work list.

2. After the **Search Results** appear, click the new **Work Next** button.
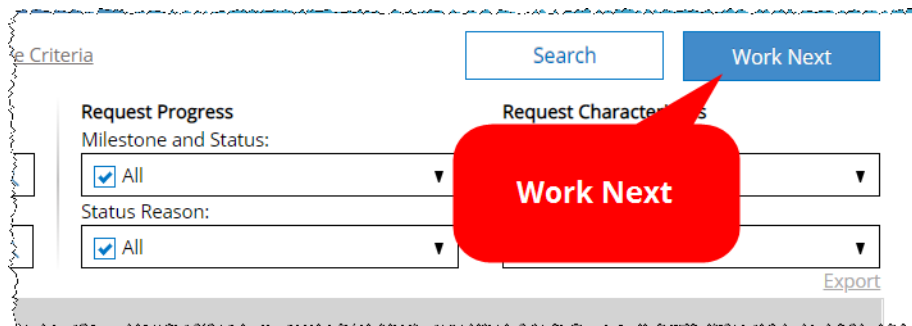
3. We open the first request in your **Search Results** that is **NOT** being worked on by another user.

4. We repeat the process if you use one of the "**and Next**" commands:

    4.1 **Submit and Next**

    4.2 **Save and Next**

    4.3 **Pend and Next**

    4.4 **Exception and Next**

    4.5 **Hold and Next**

5. If you use these commands, you'll return to the **Search Results**:

Command	Available from these screens
Save and Close	Logging Fulfillment Split New Requester
Submit and Close	Logging Fulfillment
Submit	Correspondence Pull List
Exception and Close	Logging Fulfillment
Hold and Close	Logging Fulfillment
Pend and Close	Fulfillment

MY WORK QUEUE AND MY DASHBOARD CHANGES

Because you can now create your own custom work lists with **Request Search**, we have made changes to the appearance and function of the **My Work Queue** and **My Dashboard** screens:

- My Work Queue removed for all users

- Log and Fulfill removed from My Dashboard for most users

- My Dashboard changes for the Logger Centralized role

My Work Queue removed for all users

My Work Queue is no longer available for anyone.

The information on this screen could not be filtered precisely enough to serve as a true "work list."
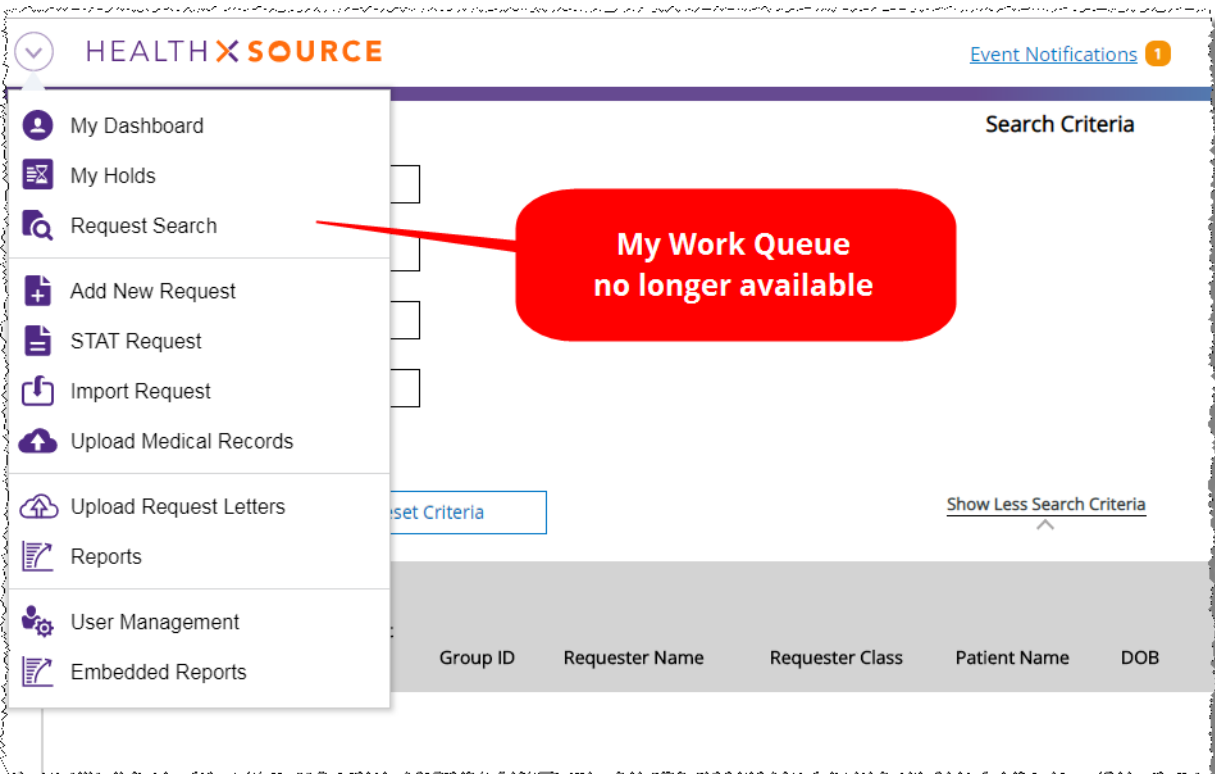
Log and Fulfill removed from My Dashboard for most users

The **Log Request** and **Fulfill Request** commands have been removed from **My Dashboard** for everyone **EXCEPT** those with the **Logger Centralized** role.
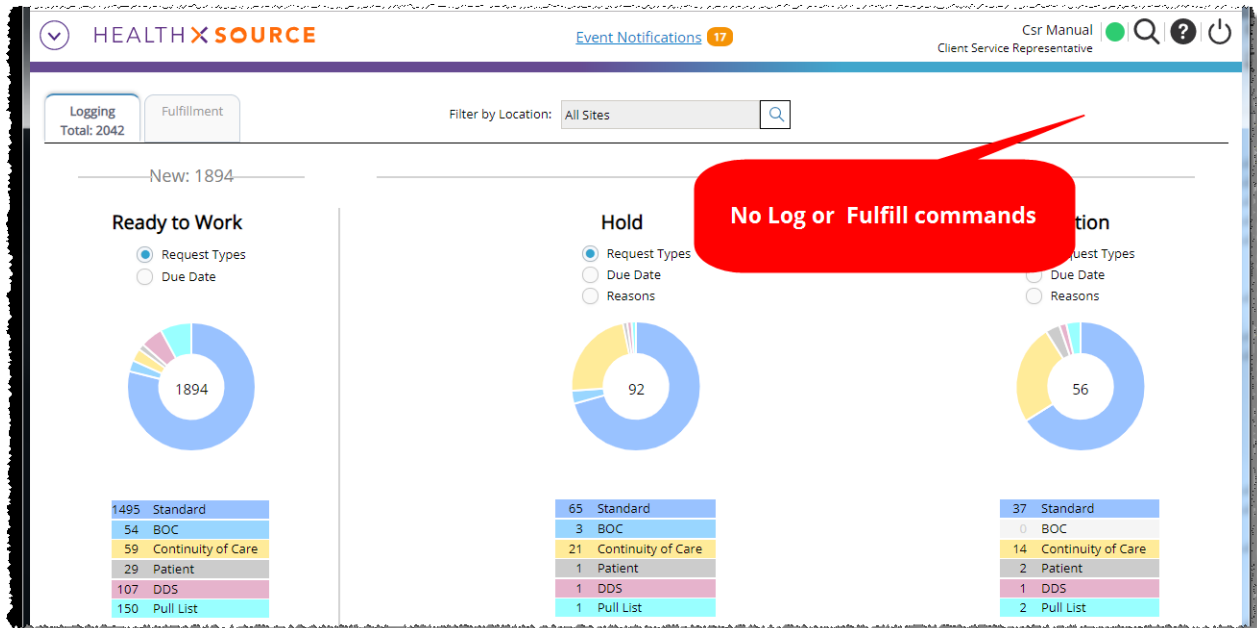
My Dashboard changes for the Logger Centralized role

Those of you with the **Logger Centralized** role will now see a **Work Next** command on **My Dashboard**.
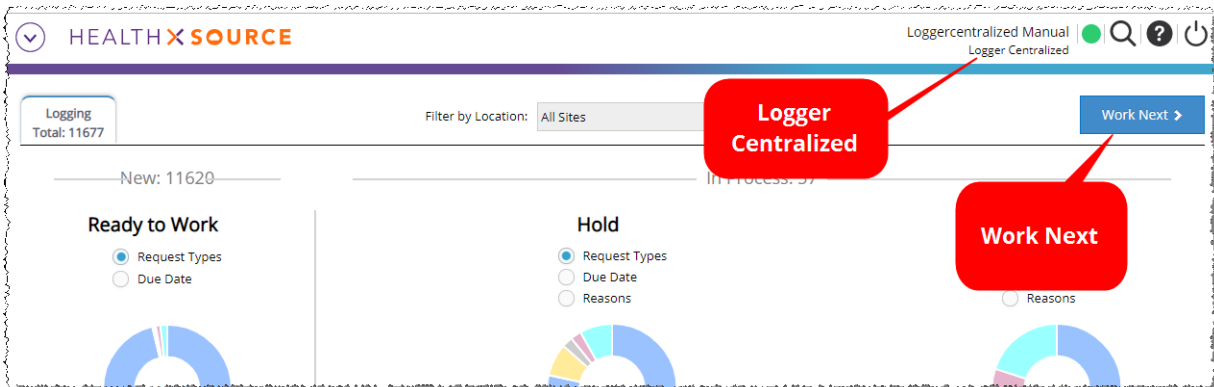
Clicking **Work Next** here brings up the next request based on our default priority:

- STAT

- Days until Due

- Oldest (first in — first out)

Changes to Post-Fulfillment Request Statuses

Four **Request Status** values that were used in earlier versions of **HealthSource Clarity** will no longer be available after the **v1.6.2** release.

Milestone	Old Status	Status after v1.6.2
Packaging	Packaging Exception	Post Fulfillment Exceptions
Delivery	Delivery Failure	Delivered This status refers to a failure of an electronic delivery direct to the requester. Specialists in the ROI Processing Center identify and fix these issues.
Delivery	Delivered w/Acknowledged Exception	Delivered
Delivery	Delivered & Acknowledged	Delivered

Any requests that were in an "old" status will be automatically updated to the replacement value.

We've also added three new **Request Status** values to better identify what happened to a request after it was fulfilled:

Milestone	New Status	Meaning
Packaging	Payment Pending	We require either fee approval or pre-payment from the requester before delivering the records, and the approval or payment has not yet been received.
Packaging	Hold	Delivery is purposely being held due to: • Motion to Quash period not yet expired (subpoena); • Request must be moved to a different site; • Demonstration delivery • RK_HOLD
Packaging	Review	Request moved to a "prepare to WIPE" state (DRD_HOLD). Request files have been WIPED (DRD_WIPED).

MESSAGING

Ciox Health's ROI Processing Center sometimes needs to contact a site about a request.

There are many reasons for this kind of message, but typically the Processing Center has found a potential problem with the selected requester or the Medical Records.

Before now, there was no way to display these messages in **HealthSource Clarity**. Instead, the messages appeared in the **RepOnline** application.

Now, however, you can see and respond to **Messages** directly in **HealthSource Clarity**. See these sections for details:

- When does a Message appear?

- When does a Message notification disappear?

- View and respond to a Message

- Search for requests associated with a Message

- Message activity tracked in Request History

When does a Message appear?

Messages are site-specific. They are **NOT** user-specific.

John Dough at Site 13270 might have handled Request 98765432 from beginning to end, but if the ROI Processing Center sends a **Message** about it, **ANYONE** with access to Site 13270 can respond.

If there is an open **Message** — one that has not yet been responded to — concerning a request at a site to which you have access, you'll see an **Event Notification** at the top of the **HealthSource Clarity** screen:
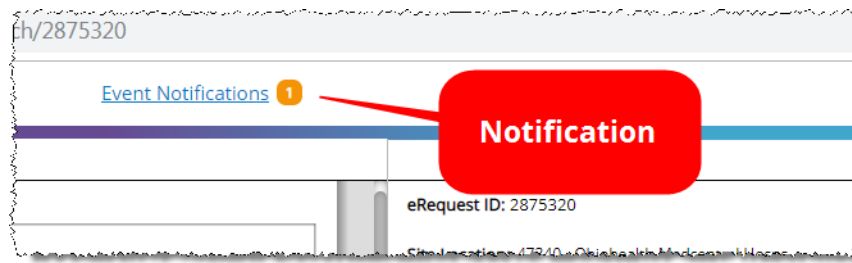
We check for open messages every 60 seconds and automatically refresh the **Event Notifications** link.

This link appears regardless of what you're viewing — the **Dashboard**, **Request Search**, **My Holds**, etc. It even appears if you open a request that is **NOT** associated with a **Message**.

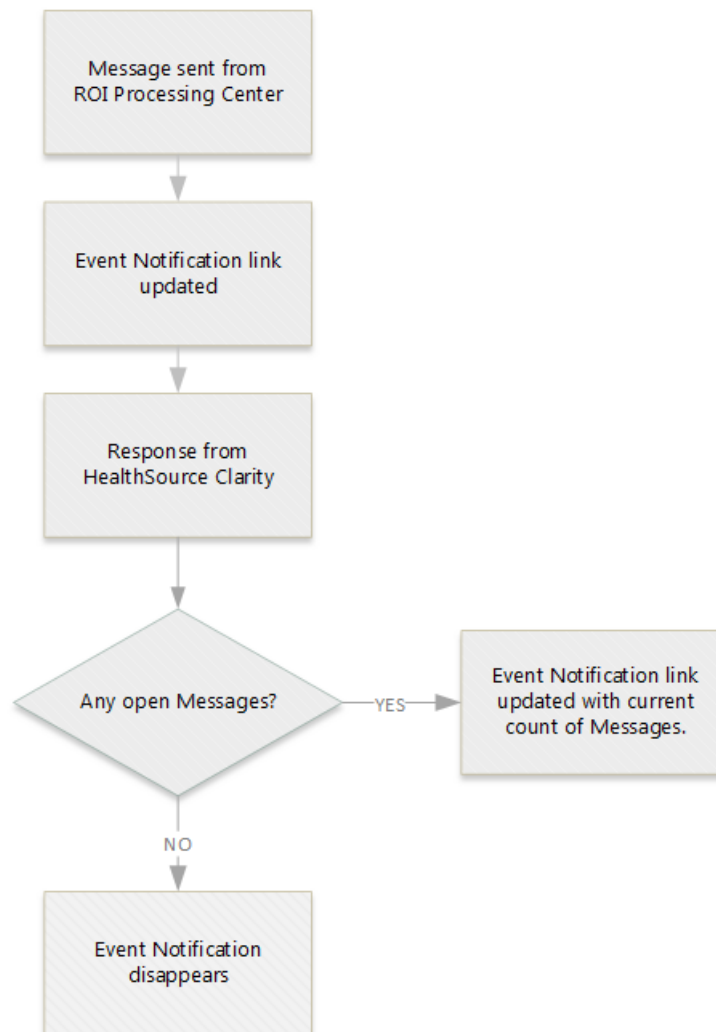> We added the **Event Notification** link in **v1.5**.
>
> At that time it was only for **Document Transmission** issues, not **Messages**.
>
> Now it serves both purposes.

When does a Message notification disappear?

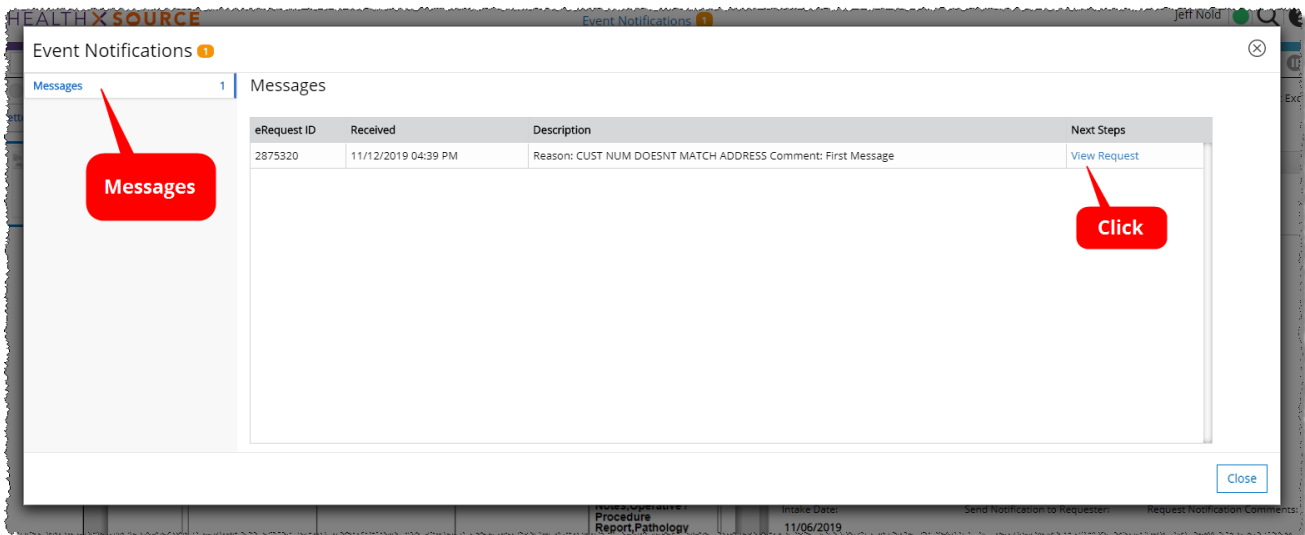**IF** your site has responded to all the **Messages** (page 42);

AND there are no **Document Transmission** notifications;

THEN the **Event Notification** link disappears.
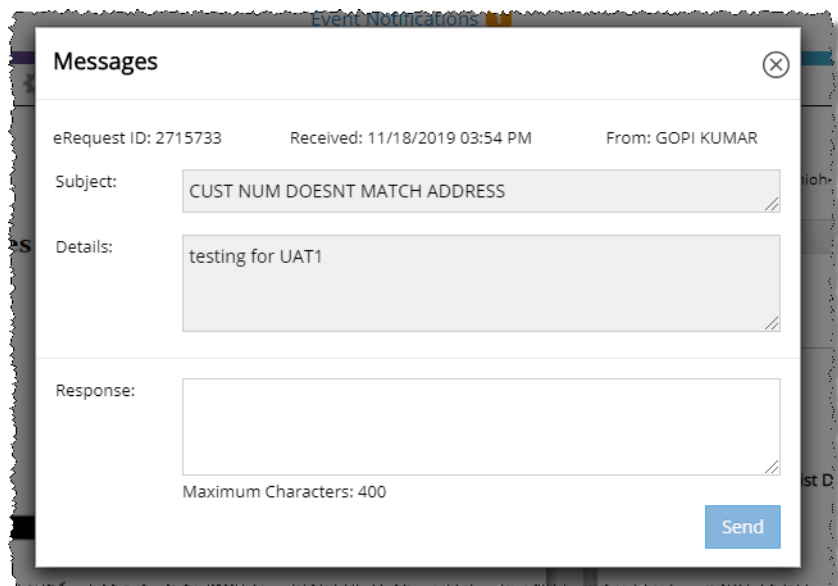
View and respond to a Message

1. Click the **Event Notifications** link.

2. The **Event Notifications** window appears. In the example below, there are no **Document Transmission** notices and only one open **Message**:

3. Click the **View Request** link.

4. The request opens with the **Messages** window displayed.

5. Read the **Details**.

6. Close the **Messages** window.

7. Review the documents and data for the request.

8. Click the **Messages** button, located to the left of the **Comments** symbol in the upper right corner of the **Request** screen.
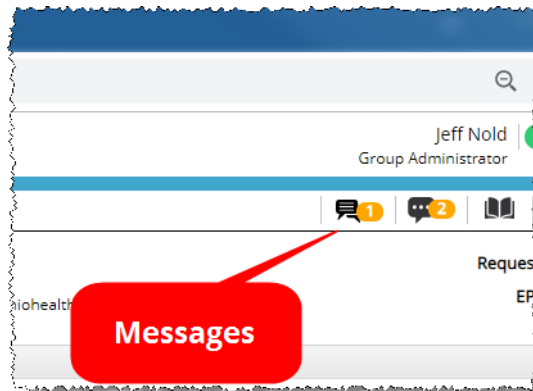
9. The **Messages** window appears again.

10. Type a **Response**. You can enter as many as 400 characters. You cannot attach pictures or other files to the **Message**.
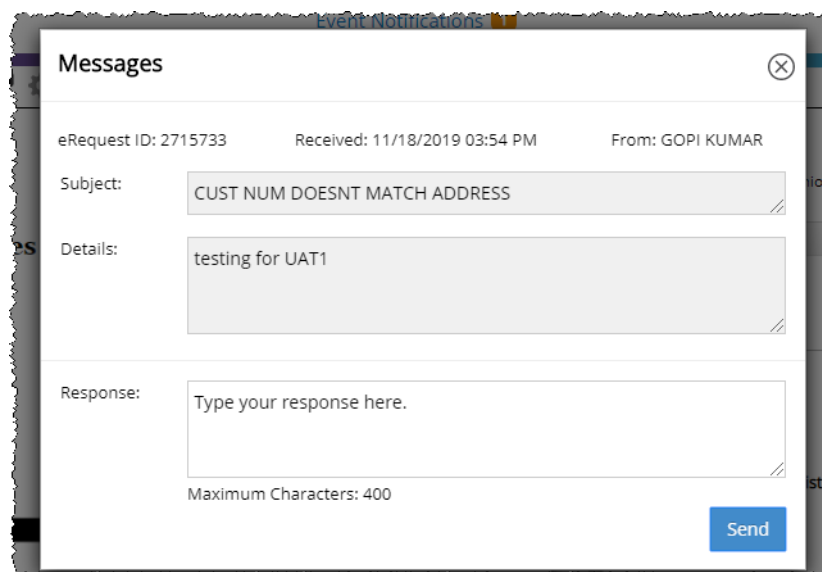
11. Click **Send**.

Search for requests associated with a Message

The **Message Response Required** field in **Request Search** looks for requests that are — or that are **NOT** — associated with a **Message** needing a response.

Option	Finds
All	Requests regardless of their **Message** condition.
Yes	Only requests for which a **Message** response is needed.
No	Only those requests that do **NOT** require a **Message** response.

Available to specific user roles

The **Message Response Required** search field is available **ONLY** to these user roles:
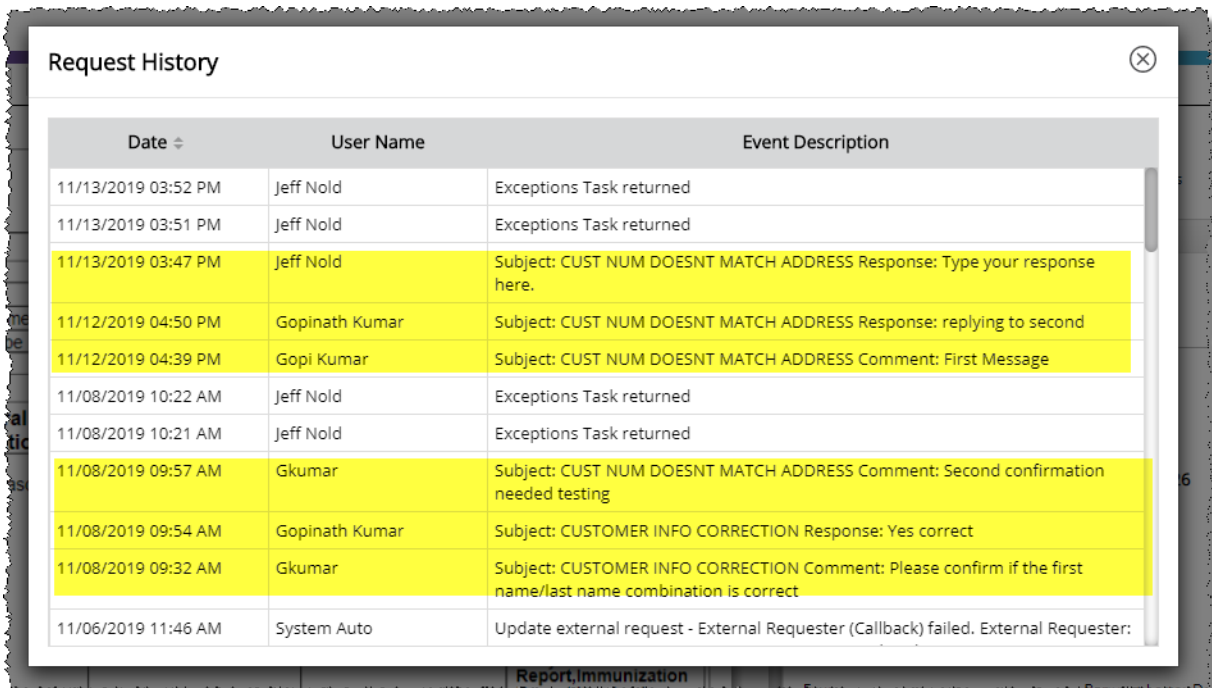
- Client Service Representative
- Internal Management
- Group Administrator
- Ciox Executive
- Account Management
- Internal Operations
- External Operations

Hidden by default

The **Message Response Required** field is located in the **Additional Request Details** section, which is hidden by default. You must **Show All Search Criteria** (page 6) to see it.

Message activity tracked in Request History

The **Request History** captures events related to **Messages**:

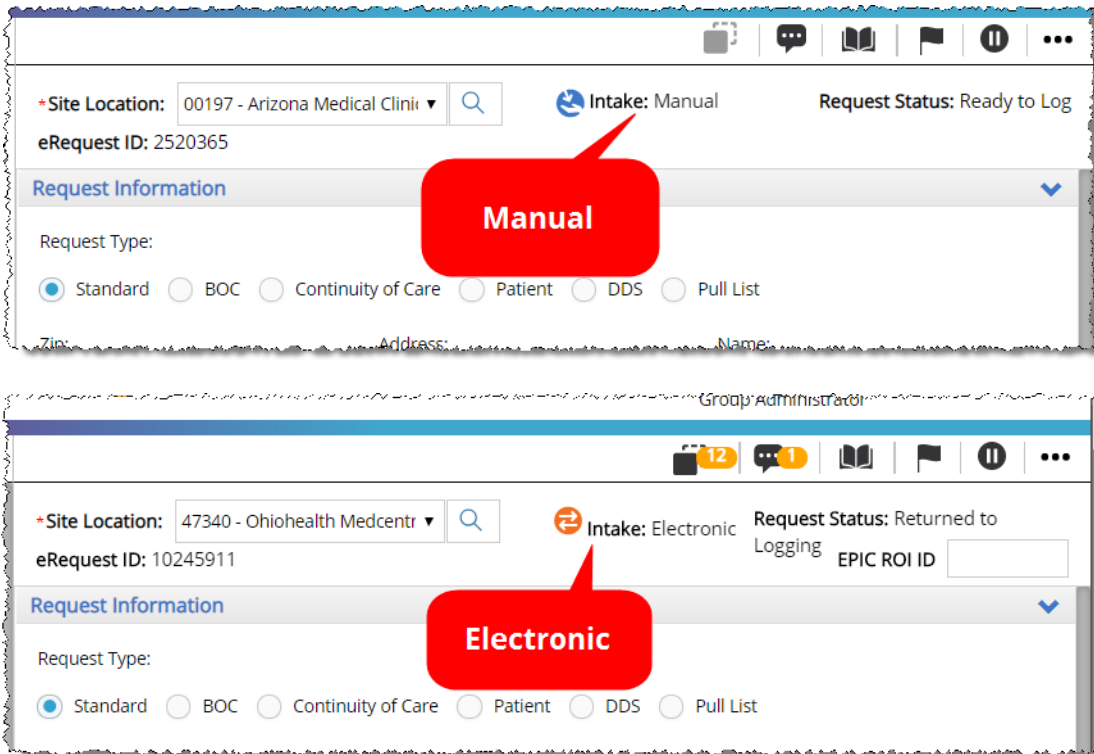| Date ⇅	User Name	Event Description
11/13/2019 03:52 PM	Jeff Nold	Exceptions Task returned
11/13/2019 03:51 PM	Jeff Nold	Exceptions Task returned
11/13/2019 03:47 PM	Jeff Nold	Subject: CUST NUM DOESNT MATCH ADDRESS Response: Type your response here.
11/12/2019 04:50 PM	Gopinath Kumar	Subject: CUST NUM DOESNT MATCH ADDRESS Response: replying to second
11/12/2019 04:39 PM	Gopi Kumar	Subject: CUST NUM DOESNT MATCH ADDRESS Comment: First Message
11/08/2019 10:22 AM	Jeff Nold	Exceptions Task returned
11/08/2019 10:21 AM	Jeff Nold	Exceptions Task returned
11/08/2019 09:57 AM	Gkumar	Subject: CUST NUM DOESNT MATCH ADDRESS Comment: Second confirmation needed testing
11/08/2019 09:54 AM	Gopinath Kumar	Subject: CUSTOMER INFO CORRECTION Response: Yes correct
11/08/2019 09:32 AM	Gkumar	Subject: CUSTOMER INFO CORRECTION Comment: Please confirm if the first name/last name combination is correct
11/06/2019 11:46 AM	System Auto	Update external request - External Requester (Callback) failed. External Requester:

User Name	Person who created or responded to the **Message**.
Subject	As created by the ROI Processing Center.
Comment	Detailed question posed by the ROI Processing Center.
Response	Text entered by **HealthSource Clarity** user.

View Intake Type on Request screen

You can now see basic information about how a request entered **HealthSource Clarity**:

	Electronic	Manual
Can be any of:	• via AudaPro Integration • Electronic • via Ciox PAYD Integration • via Ciox PAYI Integration	• Add New Request • Email • Fax and Split • Patient Portal • Pull List • via Upload Request Letter
Meaning	Created from data and documents sent through a direct electronic channel. Typically these requests move straight to **Fulfillment**.	Created by submitting a Request Letter or individual patient data. These requests enter the workflow at the **Logging** step.

RETAIN REQUESTER ON SWITCH BETWEEN STANDARD AND PULL LIST

IF you are working on a **Standard** request;

AND the requester fields are already filled out;

BUT you change the **Request Type** to **Pull List** because the Request Letter lists multiple patients;

THEN the requester information is **RETAINED**, not wiped out.

Also works in the opposite order

The same rule holds true in reverse — changing from **Pull List** to **Standard** does **NOT** wipe out any requester information already saved as part of the request.

Only for Standard and Pull List requests

Changing from **Standard** or **Pull List** to these **Request Type** choices **DOES** wipe out any current requester selection:

- **BOC**

- **Continuity of Care**

- **Patient**

- **DDS**

AUTOMATIC IDENTIFICATION OF HIGH VOLUME REQUESTERS

HealthSource Clarity can now automatically identify and select two high-volume requesters if the Request Letter contains sufficient information:

Keyword	Address matching
Change Healthcare	P.O. Box 14415 Lexington, KY 40512
EquiClaim	1849 W Drake Drive Suite 101 Tempe, AZ 85283

If the matching process finds the required information shown above:

1. The requester will be automatically selected.

   1.1   Change Healthcare, Requester # 1607658.

   1.2   EquiClaim, Requester # 1650396.

2. The **Find Requester** fields and commands will be unavailable.

3. The **Approved Requester Name and Address** message will be displayed.