



# **HealthSource Clarity**

## **v1.6.3 Release Notes**

January 2020

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## Document History

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## HealthSource Clarity v1.6.3 Release Notes

Information	See page
<a href="#">Browsers used during development</a>	4
<a href="#">Potential duplicates flagged during Fulfillment</a>	5
<a href="#">Site info added to Message list</a>	10
<a href="#">Post Office standards applied to patient addresses</a>	11
<a href="#">Revised Correspondence Letter</a>	13



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

## BROWSERS USED DURING DEVELOPMENT

We used these browser versions during the development and testing of **v1.6.3**:

Browser	OS	Version / Build #
Chrome	Windows 7 or 10	79.0.3945.88
Internet Explorer	Windows 7	11.0.9600.18617
Internet Explorer	Windows 10	11.0.10240.16384
Edge	Windows 10	44.18362.267.0

Check that your browser is up-to-date to avoid possible problems with the new release.



Clear your browser cache daily for best performance.

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## POTENTIAL DUPLICATES FLAGGED DURING FULFILLMENT

We now check for possible duplicates during **Fulfillment**:

- When you open a Ready to Fulfill request, we show you any potential duplicates right away ([page 7](#));
- When you're working on a request in any **Fulfillment** state, the **Potential Duplicates** indicator ([page 9](#)) lets you know that you might be doing unnecessary work.

Previously, we ran the duplicate check only during **Logging**.



We're constantly trying to eliminate possible duplicates before they're seen by Client Service Representatives, but we need your help.

Please **DON'T** simply process a request and assume that "the system" will handle duplicates. Every duplicate request means extra work for your Ciox Health co-workers. They cost real money and cause real problems with requesters.

## Duplicate detection rules

To qualify as potential duplicates, requests must share **ALL** of these values:

- Site
- Requester
- Patient Last Name (complete match)
- Patient First Name (first letter match)
- Patient DOB or SSN

## Requests excluded from the potential duplicate pool

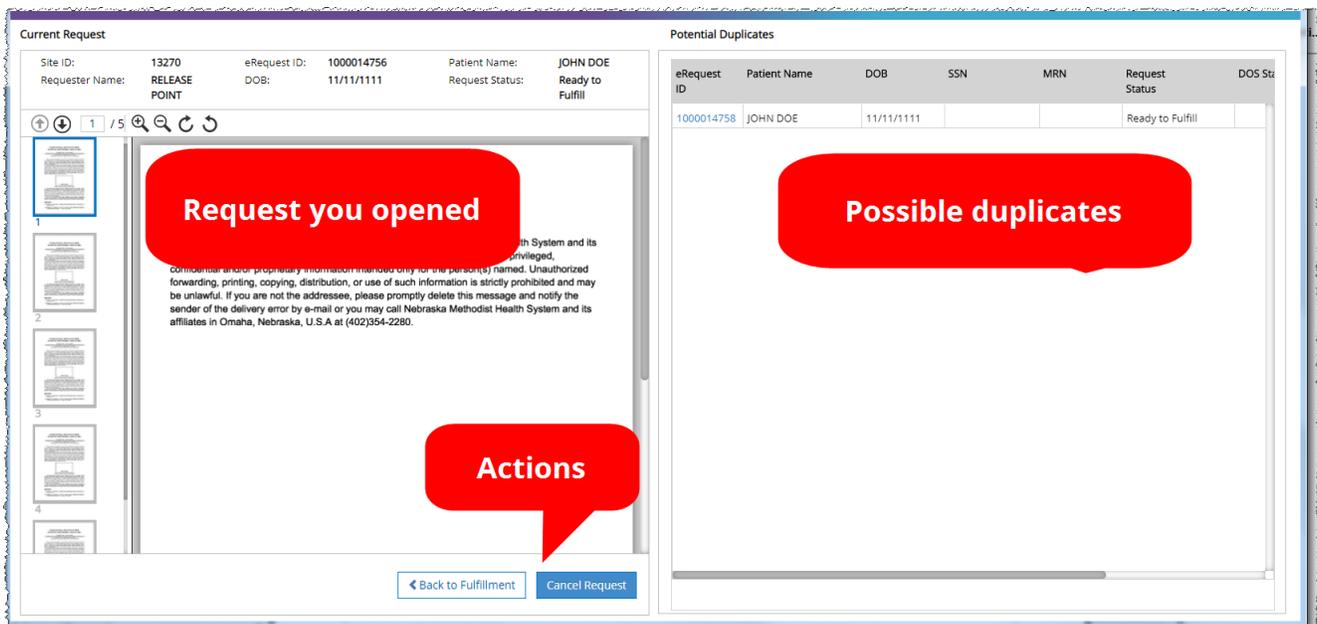
When we're checking a request in **Fulfillment** for possible duplicates, we **DON'T** look at existing requests that were:

- Canceled;
- Closed because we sent **Correspondence** to the requester;
- received more than 90 days ago.

## Duplicate detection for Ready to Fulfill requests

We **IMMEDIATELY** check for duplicates when you open requests that are Ready to Fulfill.

1. Open a request that is Ready to Fulfill.
2. If we find a possible duplicate, the **Potential Duplicates** screen appears.
  - 2.1 The Request Letter for the request you opened appears in the left window. The information used for duplicate detection is shown in the header.
  - 2.2 Possible duplicates are listed in the right window. The example shows only one match, but there can be more than one.



The screenshot displays a software interface with two main panels. The left panel, titled 'Current Request', shows a header with the following information: Site ID: 13270, eRequest ID: 1000014756, Patient Name: JOHN DOE, Requester Name: RELEASE POINT, DOB: 11/11/1111, and Request Status: Ready to Fulfill. Below the header is a list of document thumbnails on the left and a large text area in the center containing a disclaimer. At the bottom of this panel are two buttons: 'Back to Fulfillment' and 'Cancel Request'. A red callout bubble labeled 'Request you opened' points to the document thumbnails. Another red callout bubble labeled 'Actions' points to the 'Cancel Request' button.

The right panel, titled 'Potential Duplicates', contains a table with the following data:

eRequest ID	Patient Name	DOB	SSN	MRN	Request Status	DOS St
1000014758	JOHN DOE	11/11/1111			Ready to Fulfill	

A red callout bubble labeled 'Possible duplicates' points to the table.

3. Is the request you opened valid and not a duplicate?

3.1 **YES** — Click **Back to Fulfillment**.

3.1.1 The **Fulfillment** screen appears, so you can capture the Medical Records as usual.

3.1.2 The **Potential Duplicate** indicator ([page 9](#)) will be active, even though you decided to proceed. Click this button to see the possible duplicates again.

3.2 **NO** — Click **Cancel Request** and select Duplicate as the **Cancel Reason**.

**Cancel Request**

\*Cancel Reason  
Duplicate

\*Comments: (Max 1000 Characters)  
jeff.nold confirmed Request ID 1000014756 is a duplicate request.

Cancel and Next

## Potential Duplicate indicator on Fulfillment screen

The **Potential Duplicate Request** indicator can be found to the left of the **Comments** button on the **Fulfillment** screen, regardless of the **Request Status**.

Symbol	Meaning
	<p>No possible duplicate requests have been found.</p> <p>On <b>PAYD</b> and <b>Express ROI</b> requests, the indicator <b>ALWAYS</b> looks like this.</p> <ul style="list-style-type: none"> <li>• We don't check <b>PAYD</b> (Direct Payor) requests for duplication at all;</li> <li>• We check <b>Express ROI</b> requests when they're submitted from <b>Logging</b>.</li> </ul>
	<p>Possible duplicate requests found.</p> <p>Click this "numbered" indicator to open the <b>Potential Duplicates</b> list.</p> <p>The number = how many possible matches.</p>

### Does duplicate checking react to changes made in Fulfillment?

Yes. For example:

1. You open a request for a patient named Doe Jane.
2. The **Potential Duplicate Request** indicator shows no possible matches, even though all the other "match" values are the same as an existing request. 
3. You change the patient's name to Jane Doe, which makes the request a complete match for the existing one.
4. After you tab "through" the **DOB** field, the **Potential Duplicate Request** indicator shows 1 possible match. Click the button to see the possible match. 
5. If you don't go "through" the **DOB** field, you'll be notified of the possible duplicate when you submit the request.

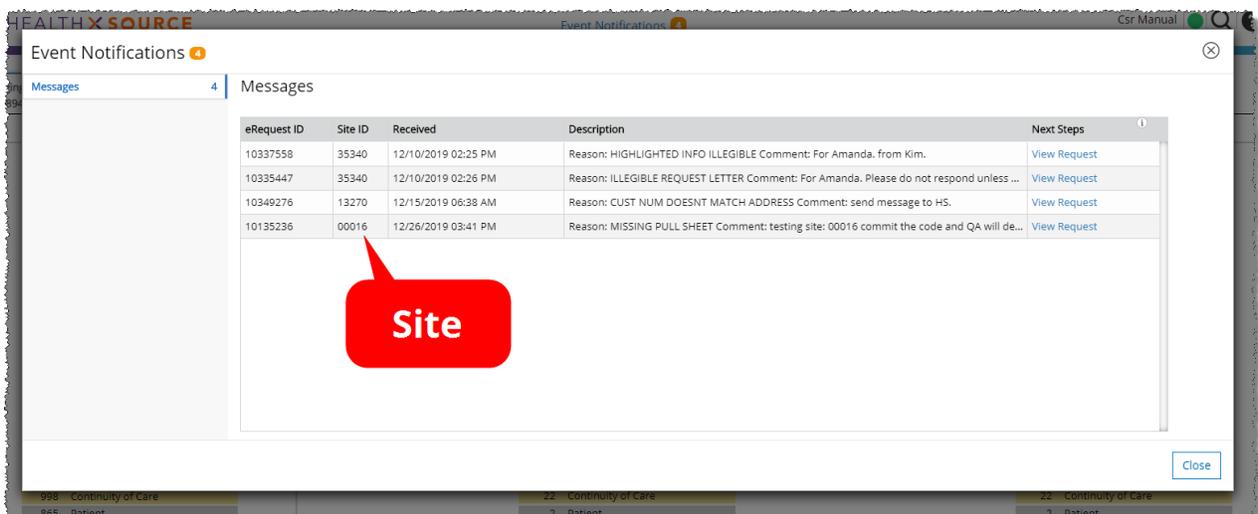
## SITE INFO ADDED TO MESSAGE LIST

Recently we gave you the ability to read and respond to **Messages** about requests.

We've now added a **Site ID** column to the **Messages** window to help you find those that you may be able to answer.

**Messages** appear to **EVERYONE** who has access to the site responsible for the request. They are **NOT** directed specifically at **YOU**.

You may have access to a site but not actually do much — or any — work on requests for that facility. In that case, you won't be able to provide a meaningful answer, and you probably shouldn't open the **Message**.



eRequest ID	Site ID	Received	Description	Next Steps
10337558	35340	12/10/2019 02:25 PM	Reason: HIGHLIGHTED INFO ILLEGIBLE Comment: For Amanda, from Kim.	<a href="#">View Request</a>
10335447	35340	12/10/2019 02:26 PM	Reason: ILLEGIBLE REQUEST LETTER Comment: For Amanda, Please do not respond unless ...	<a href="#">View Request</a>
10349276	13270	12/15/2019 06:38 AM	Reason: CUST NUM DOESNT MATCH ADDRESS Comment: send message to HS.	<a href="#">View Request</a>
10135236	00016	12/26/2019 03:41 PM	Reason: MISSING PULL SHEET Comment: testing site: 00016 commit the code and QA will de...	<a href="#">View Request</a>

## Important reminder — responding to a Message closes it!

If you can't provide a detailed answer, please do **NOT** respond to a **Message**.

Responding to a **Message** closes it. We've received responses like "I don't work at this site" or "I don't know anything about this request." Those responses may be true, but they're not helpful. The ROI Processing Center must then send a new **Message** to get the answer they need.

If in doubt, check with your supervisor and your co-workers. Someone else may be able to provide the required information.

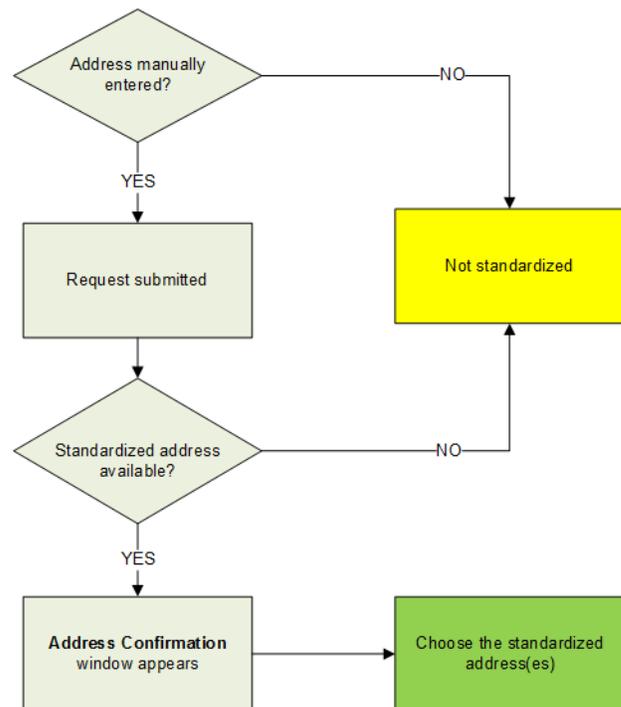
## POST OFFICE STANDARDS APPLIED TO PATIENT ADDRESSES

If you manually type an address for a **Patient** request, **HealthSource Clarity** now checks for a standardized version that follows United States Postal Service guidelines such as:

- ALL CAPS
- Preferred abbreviations (ST, CT, HWY)
- ZIP+4

**Address Standardization** does **NOT** verify that:

- The City, State, and Zip Code all match;
- The address actually exists.



This change applies to **ALL** addresses (**Ship To** and, if present, **Bill To**) that are manually entered for a **Patient** request, regardless of the **Primary Reason for Request**.

Previously, we did not run a standardized address check for **Patient** requests.

## Address Confirmation window

The **Address Standardization** check occurs when you **Submit** the request, not when you type an address.

If **HealthSource Clarity** finds a standardized address, you'll see an **Address Confirmation** window showing the original entry and the standardized choice:

The screenshot shows a window titled "Address Confirmation" with a close button in the top right. The main text reads: "To improve the accuracy of the entered address, address(es) has/have been standardized. Please select and confirm the address from the below options." Below this are two panels. The left panel, "Address Entered", shows "Patient/Bill To" with a radio button selected for "5 Saddlewood Court, Hilton Head SC 29926". A red callout box below it says: "Lower case Court spelled out City name not complete 5 digit ZIP". The right panel, "Standardized Address (recommended)", shows "Patient/Bill To" with a radio button selected for "5 SADDLEWOOD CT, HILTON HEAD ISLAND SC 29926-2607". A green callout box below it says: "Upper case Court abbreviated CT Full city name ZIP + 4". At the bottom right are "Cancel" and "Save" buttons. A dropdown menu at the very bottom says "- Select Notification to Requester -".

You can accept the standardized option or select the original entry.

If **HealthSource Clarity** does not find a standardized address, the **Address Confirmation** window does not appear.

## REVISED CORRESPONDENCE LETTER

The **Authorization Sensitive Information Partial Records** reason has been renamed **Restrictive Authorization**. This option is available when you send **Correspondence** during **Fulfillment**.

The text of the letter has also been changed. It now reads:

*Thank you for your medical records request for the patient above. The authorization that you provided does not authorize specific items and/or protected health information governed by state and federal law that is incorporated within the medical records, therefore please provide a HIPAA Authorization completed by the patient authorizing all components to be released.*

*If you have any questions, please feel free to contact us.*

Previously, the letter stated:

*Thank you for your medical records request for the patient above. We have enclosed partial records responding to the request. To the extent your request may call for additional records, we refer you to the Federal Regulations set forth at 42 C.F.R. Part 2 (authorized by 42 U.S.C.S. §290dd-2).*

*To the extent this request seeks any additional records, please complete the attached authorization in its entirety. If you have any questions, please feel free to contact us at the number listed below.*