



HealthSource Clarity

v2.0 Release Notes

August 2020



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HealthSource Clarity v2.0 Release Notes

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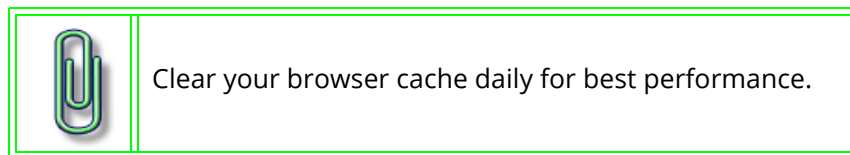
You do **NOT** need to update your **TrayApp** to use this new version.

BROWSERS USED DURING DEVELOPMENT

We used these browser versions during the development of **HealthSource Clarity v2.0**:

Browser	OS	Version / Build #
Chrome	Windows 7 or 10	84
Internet Explorer	Windows 7	11.0.9600.18617
Internet Explorer	Windows 10	11.356.18362.0
Edge	Windows 10	84

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



DIGITAL FULFILLMENT

The new **Digital Fulfillment** workflow automatically finds Medical Records in an EMR system and attaches those documents to a request, without any human work.



This feature only affects sites that already used Computer Aided Retrieval (CAR) before the **v2.0** release. The CAR process is also referred to as BOT retrieval.

If your site does not use CAR / BOT, you may want to skip this section and go to [page 15](#).

See these topics for specific information on this major improvement to the efficiency of retrieving records:

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Why the change?

When we first introduced the CAR / BOT process, we could not “set aside” requests for automatic Medical Record retrieval:

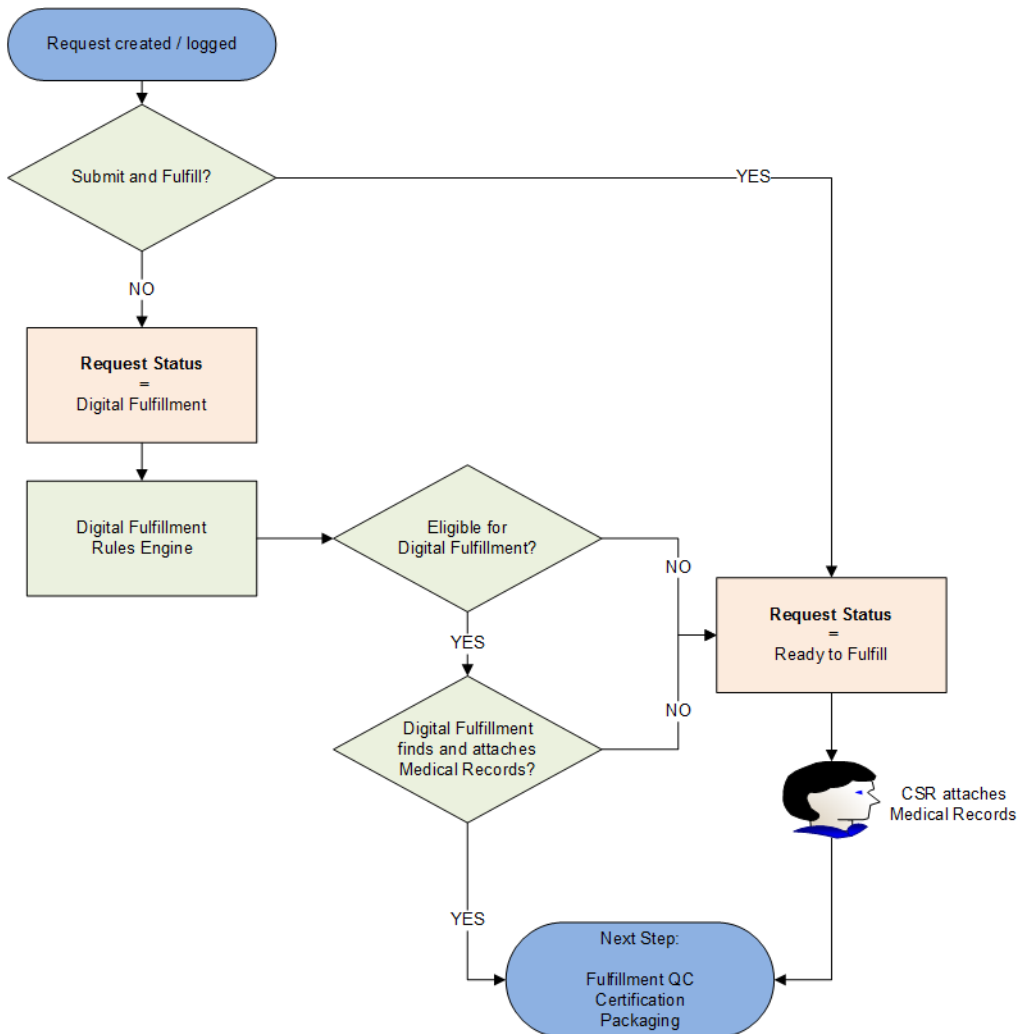
1. All requests still went to the Ready to Fulfill status.
2. The CAR process would then “grab” some of these Ready to Fulfill requests and see if they could be automatically fulfilled.
3. Client Service Representatives were trying to manually fulfill those same requests.

The two workflows, automatic and manual, occasionally came into conflict. A CSR might try to work a request that was being handled by CAR and vice-versa. It was understandably frustrating for a CSR to open a request and find it was read-only, since there was no way to tell in advance that it had been picked up by CAR. Requests that had been grabbed but not yet fulfilled by CAR could also negatively affect a site’s turnaround time measurements, though no fault of the CSR team members.

The improved **Digital Fulfillment** process will be much more efficient:

- Almost all requests initially go through a new Digital Fulfillment status for evaluation;
- Requests that cannot be fulfilled automatically are quickly pushed to Ready to Fulfill so a CSR can handle them;
- We can easily identify how many requests “belong” to the Digital Fulfillment and manual workflows.

Overview of the Digital Fulfillment Workflow



What requests are excluded from Digital Fulfillment?

Only **Express ROI** requests, those that went directly from **Logging** to **Fulfillment** through the **Submit and Fulfill** command, are excluded from entering the new **Digital Fulfillment** status.

Digital Fulfillment status

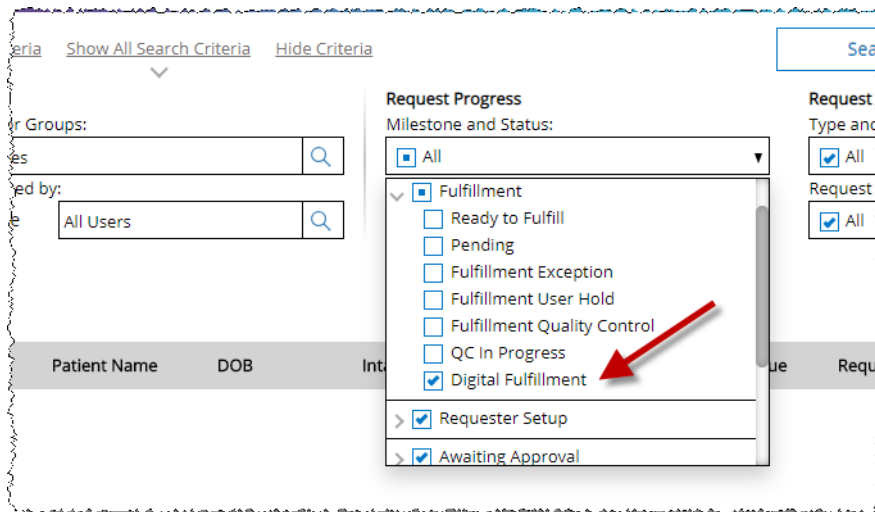
v2.0 introduces a new **Request Status** — Digital Fulfillment.

This new status allows us to put a request “out of reach” of Client Service Representatives while we run it through the **Digital Fulfillment Rules Engine**.

In other words, we use the new status to build a queue of requests that can be potentially be fulfilled automatically.

If you’re a CSR, you can now exclude requests with the Digital Fulfillment status from your **Request Search** results and focus instead on those that are truly Ready to Fulfill.

By default, **Request Search** for a CSR does show Digital Fulfillment requests. You should consider removing these requests from your search.



Digital Fulfillment Rules Engine

The request remains in the Digital Fulfillment status while the **Digital Fulfillment Rules Engine** evaluates it.

For the initial release, we check four factors:

Site	The site must be configured to use the Digital Fulfillment workflow. This configuration is managed by Ciox Health specialists. You CANNOT enable / disable your site through HealthSource Clarity .
Requester Type	As specified for your Site.
Primary Reason for Request	Each site can limit Digital Fulfillment to specific Requester Type(s) and Primary Reasons for Request . For example, many sites will only send PAYD — MRA requests through the workflow.
Delivery Method	Any of: <ul style="list-style-type: none"> • eDelivery • Electronic • Mail

Based on the results of the evaluation, the request moves to the next appropriate step:

- Meets requirements — remains in a status of Digital Fulfillment and the workflow attempts to locate and attach the requested Medical Records.
- Does not meet requirements — the **Request Status** changes to Ready to Fulfill so it can be manually processed by a CSR. These requests are then “out” of the **Digital Fulfillment** workflow.

What if the record retrieval fails?

If **Digital Fulfillment** tries and fails to find the patient, or to attach Medical Records, the request moves to a Ready to Fulfill status.

Possible causes of failure

This list does not include all possibilities, only the most common:

- Not enough information to identify the patient;
- Multiple patients possibly match the request;
- Medical Records not available in EMR;
- Medical Records found but are too large (>100MB) to be attached to the request;
- Records not found before 6 month timeout period expires.

This timeout policy prevents requests from being “stuck” and effectively invisible in the **Digital Fulfillment** queue, which would in turn affect customer satisfaction and our own Turnaround Time measures.

Request Search and Digital Fulfillment

These **Request Search** fields and values may help you locate requests that are headed to, currently in, or went through the **Digital Fulfillment** workflow:

Search Field	Value	Description
Milestone and Status	Fulfillment — Digital Fulfillment	Remember, many requests are assigned to this status so they can be evaluated by the Digital Fulfillment Rules Engine. Simply because the Request Status = <u>Digital Fulfillment</u> does NOT mean the workflow can actually attach Medical Records to it.
Type and Requester Class	As specified for your site.	Each site can limit Digital Fulfillment to specific Requester Type(s) and Primary Reasons for Request .
Request Reason		For example, many sites will only send PAYD — MRA requests through the workflow.

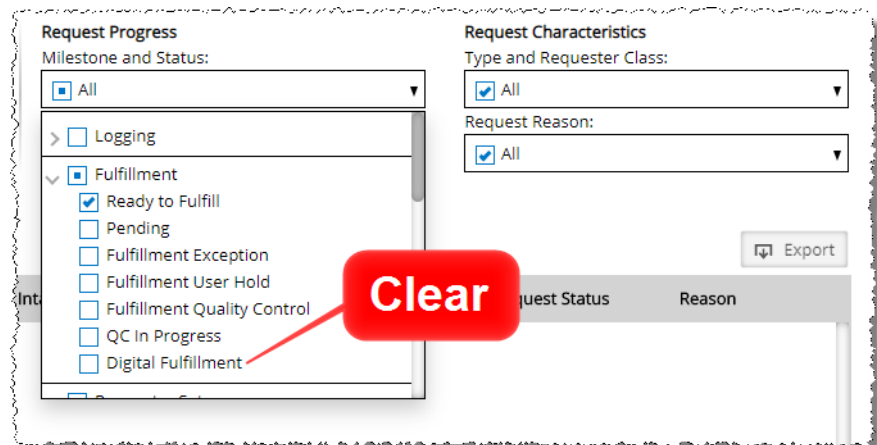
CSR search recommendations

If you're a CSR, we suggest that you clear **Digital Fulfillment** from the **Milestone and Status** list before running a **Request Search**.

You shouldn't be "served" these **Digital Fulfillment** requests if you use these commands:

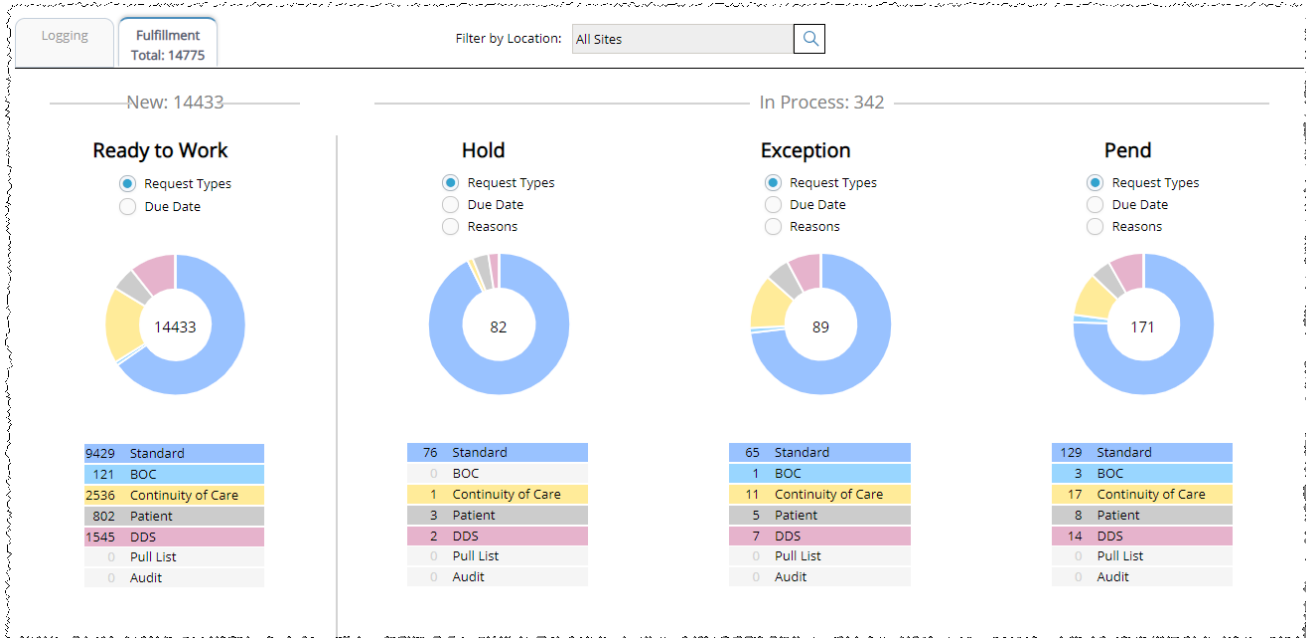
- **Work Next**
- **Submit and Next**

The **Next** commands should ignore **Digital Fulfillment** requests because they are not "available" for you to work. Still, the application may work a bit faster and more smoothly if you keep them out of your **Search Results**.



Digital Fulfillment requests not shown on Fulfillment Dashboard

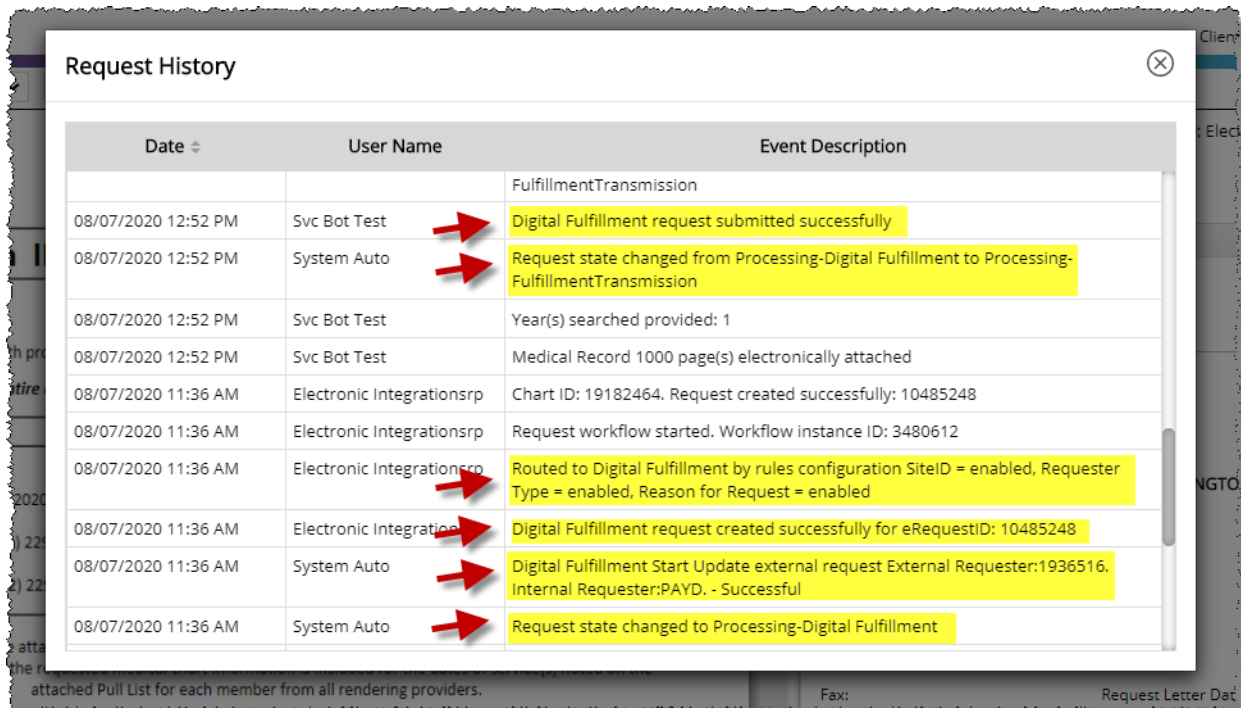
None of the **Fulfillment Dashboard** categories include requests in the **Digital Fulfillment** status.



Category	Request Status
Ready to Work	Ready to Fulfill
Hold	Fulfillment User Hold
Exception	Fulfillment Exception
Pend	Pend

Digital Fulfillment events captured in Request History

The **Request History** captures each step of the **Digital Fulfillment** workflow, including any failures / issues that push it to Ready to Fulfill.



Date	User Name	Event Description
		FulfillmentTransmission
08/07/2020 12:52 PM	Svc Bot Test	Digital Fulfillment request submitted successfully
08/07/2020 12:52 PM	System Auto	Request state changed from Processing-Digital Fulfillment to Processing-FulfillmentTransmission
08/07/2020 12:52 PM	Svc Bot Test	Year(s) searched provided: 1
08/07/2020 12:52 PM	Svc Bot Test	Medical Record 1000 page(s) electronically attached
08/07/2020 11:36 AM	Electronic Integrationsrp	Chart ID: 19182464. Request created successfully: 10485248
08/07/2020 11:36 AM	Electronic Integrationsrp	Request workflow started. Workflow instance ID: 3480612
08/07/2020 11:36 AM	Electronic Integrationsrp	Routed to Digital Fulfillment by rules configuration SiteID = enabled, Requester Type = enabled, Reason for Request = enabled
08/07/2020 11:36 AM	Electronic Integrationsrp	Digital Fulfillment request created successfully for eRequestID: 10485248
08/07/2020 11:36 AM	System Auto	Digital Fulfillment Start Update external request External Requester:1936516. Internal Requester:PAYD. - Successful
08/07/2020 11:36 AM	System Auto	Request state changed to Processing-Digital Fulfillment

Digital Fulfillment Reporting

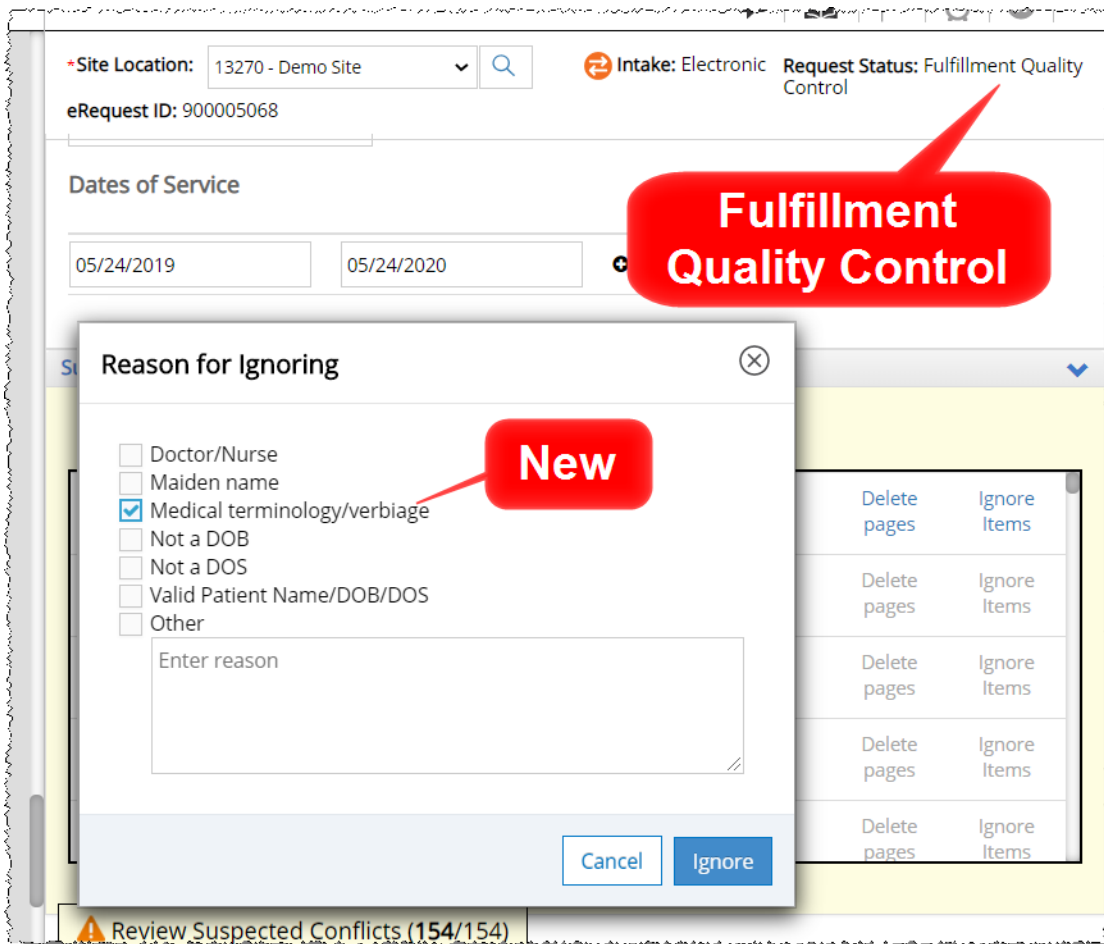
There is currently no report specifically geared to the **Digital Fulfillment** workflow. However, these requests are captured in the existing reports:

- Requests that are currently in the Digital Fulfillment status are treated as “open” and will be part of the available inventory (requests that need to be worked);
- Requests pushed out of Digital Fulfillment to Ready to Fulfill count just like any other request in need of **Fulfillment**;
- Requests that were successfully submitted from **Digital Fulfillment** count as “complete” from the standpoint of site productivity, even if they have not yet gone through the Back Office / Delivery steps.

NEW IGNORE REASON FOR FULFILLMENT QUALITY CONTROL

This change only affects those **HealthSource Clarity** users with the **QA Reviewer** role or the **QC Reviewer** permission.

You can now choose Medical Terminology / Verbiage as a **Reason for Ignoring** a potential problem found during **Fulfillment Quality Control**.

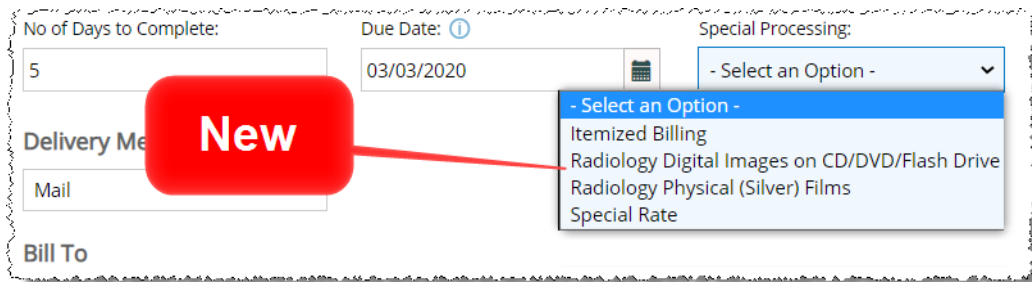


We added this reason because **Fulfillment Quality Control** can mistakenly flag medical terms, especially those that are capitalized, as possible suspects. These words may “look like” a person’s name, and since this “mistaken” name doesn’t match the actual patient, it may be flagged as a suspect.

UPDATED RADIOLOGY OPTIONS FOR SPECIAL PROCESSING

If the request calls for only radiological images, without any other Medical Records, you must choose the correct **Special Processing** option. We've made these choices easier to understand in **v2.0**:

Format of images	Special Processing option	Delivery Method
Digital files	Radiology Digital Images on CD/DVD/Flash Drive	CD / DVD / Flash Drive
Physical film	Radiology Physical (Silver) Films	Walk-in Handed to the requester



The screenshot shows a form with the following fields: 'No of Days to Complete' (5), 'Due Date' (03/03/2020), 'Special Processing' (dropdown menu), 'Delivery Method' (Mail), and 'Bill To'. A red callout box labeled 'New' points to the 'Special Processing' dropdown menu, which is open and shows the following options: '- Select an Option -', 'Itemized Billing', 'Radiology Digital Images on CD/DVD/Flash Drive', 'Radiology Physical (Silver) Films', and 'Special Rate'.

The **Special Processing** field only appears during **Fulfillment**, and then only for specific combinations of **Requester Type** and **Reasons for Request**.

Even if **Special Processing** appears, the radiology choices will only be available when the request meets these conditions (table continues on next two pages):

Site State	Major Class	Primary Reason for Request	Secondary Reason
All	ATTY / COPYA	Attorney	<ul style="list-style-type: none"> • Defense Attorney • Defense Subpoena • Personal Injury • State Attorney Office • Represent Indigent
KY	ATTY / COPYA	Attorney	Subpoena 2nd Request

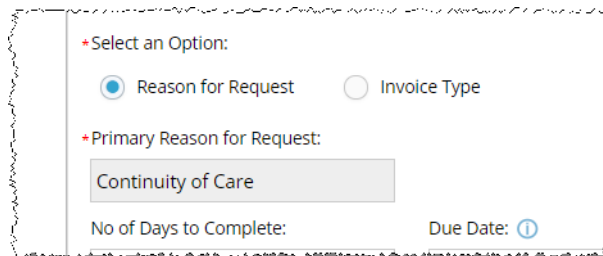
Site State	Major Class	Primary Reason for Request	Secondary Reason
KY, NV, TN, WA	ATTY / COPYA	Attorney	SSI Claim 2nd Request
NJ, SC	ATTY / COPYA	Attorney	Hospital Per Admission
All	ATTY / COPYA	Patient Directive	N/A
KY	ATTY / COPYA	Personal Injury	2nd Request
All	ATTY / COPYA	Social Security / Disability	<ul style="list-style-type: none"> • Social Security Appeal • Social Security Claim / Application
WI	ATTY / COPYA	Social Security / Disability	Attorney REP PAT
KY, NV, TN, WA	ATTY / COPYA	Social Security / Disability	Social Security Claim / Appeal 2nd Request
All	ATTY / COPYA	Subpoena	<ul style="list-style-type: none"> • Subpoena • Defense Subpoena • Workers Comp Subpoena
NY	ATTY / COPYA	Subpoena	Subpoena-deposition / trial testimony with records
All	ATTY / COPYA	Workers Comp	<ul style="list-style-type: none"> • Workers Comp 2nd Request • Workers Comp Subpoena • Workers Comp
OH, WA, WV	ATTY / COPYA	Workers Comp	Workers Comp Self Insured
All	INS / COPYI	Audit of Claims	Any
All	INS / COPYI	Disability	Any
All	INS / COPYI	Insurance	<ul style="list-style-type: none"> • BC / BS Claim • Standard Insurance Claim Payment • Underwriting
PA	INS / COPYI	Insurance	Non Medical Insurance Claim
TX	INS / COPYI	Insurance	Pharmacy

Site State	Major Class	Primary Reason for Request	Secondary Reason
KY	INS / COPYI	Insurance	2nd Request Insurance
All	INS / COPYI	Medicare / Medicaid	Any
All	INS / COPYI	Patient Directive	N/A
All	INS / COPYI	Workers Comp	<ul style="list-style-type: none"> • 2nd Request Workers Comp • Standard Workers Comp
OH, WA, WV	INS / COPYI	Workers Comp	Workers Comp Self Insured
All	GOV	Attorney	<ul style="list-style-type: none"> • Attorney General • State Attorney
All	GOV	Subpoena	N/A

IDENTIFY NON-BILLABLE CONTINUITY OF CARE REQUESTS

IF

the **Primary Reason for Request** = Continuity of Care;



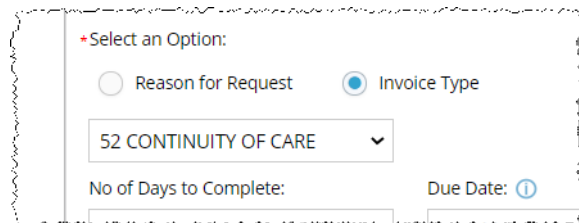
*Select an Option:
 Reason for Request Invoice Type

*Primary Reason for Request:
Continuity of Care

No of Days to Complete: Due Date: ⓘ

OR

the **Invoice Type** = 52;



*Select an Option:
 Reason for Request Invoice Type

52 CONTINUITY OF CARE ▼

No of Days to Complete: Due Date: ⓘ

THEN

the request will be flagged as **Non-Billable**.

This rule affects all future requests as well as any that already exist but have not yet reached the **Back Office** or later steps of the **HealthSource Clarity** workflow.

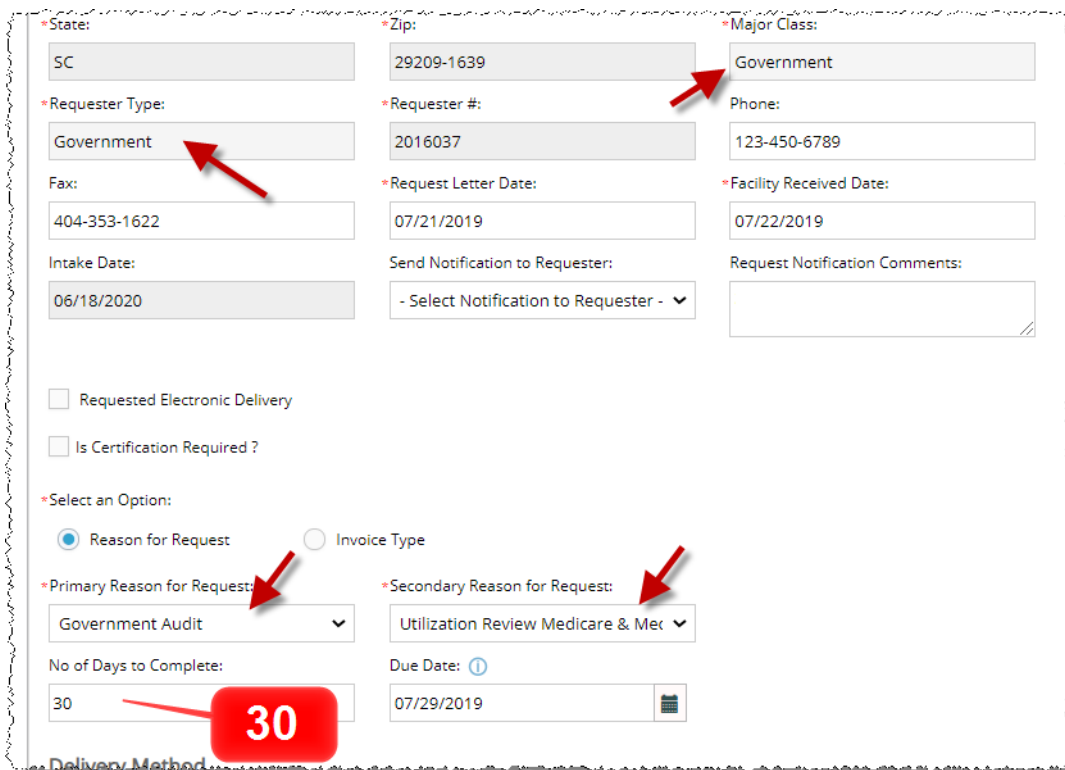
GOVERNMENT UTILIZATION REVIEW REQUESTS DUE IN 30 DAYS

We now calculate the **Due Date** for the following requests by adding **30 DAYS** to the **Request Letter Date**:

Major Class	GOV (Government)
Requester Type	GOV (Government)
Primary Reason for Request	Government Audit
Secondary Reason for Request	Utilization Review Medicare & Medicaid

Previously, the **Due Date** was **5 DAYS** after the **Request Letter Date** for such requests.

Any requests for which the **Due Date** has already been calculated will **NOT** be affected by this change.



*State: SC

*Zip: 29209-1639

*Major Class: Government

*Requester Type: Government

*Requester #: 2016037

Phone: 123-450-6789

Fax: 404-353-1622

*Request Letter Date: 07/21/2019

*Facility Received Date: 07/22/2019

Intake Date: 06/18/2020

Send Notification to Requester: - Select Notification to Requester -

Request Notification Comments:

Requested Electronic Delivery

Is Certification Required?

*Select an Option:

Reason for Request Invoice Type

*Primary Reason for Request: Government Audit

*Secondary Reason for Request: Utilization Review Medicare & Mer

No of Days to Complete: 30

Due Date: 07/29/2019

Delivery Method:

EPIC INTEGRATION CHANGES

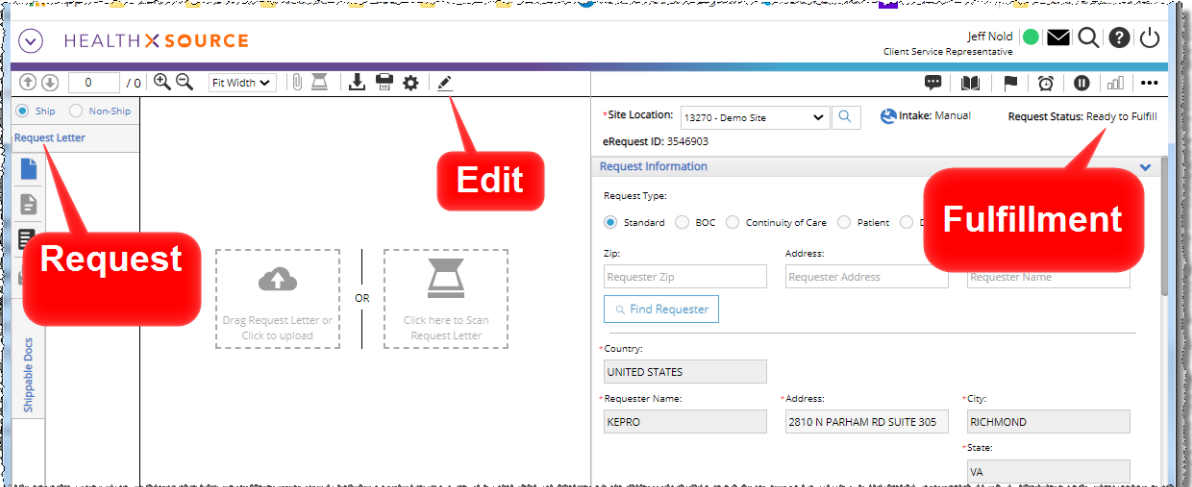
At Sites where **HealthSource Clarity** is integrated with an Epic EMR, we can now run a **Patient Lookup** for requests that are Ready to Fulfill. A successful lookup creates an **EPIC ROI ID** for the request.

Previously, these requests had to be **Pended** or put **On Hold** to run a lookup.

See the separate *HealthSource Clarity v2.0 Epic Integration Changes* document for full details.

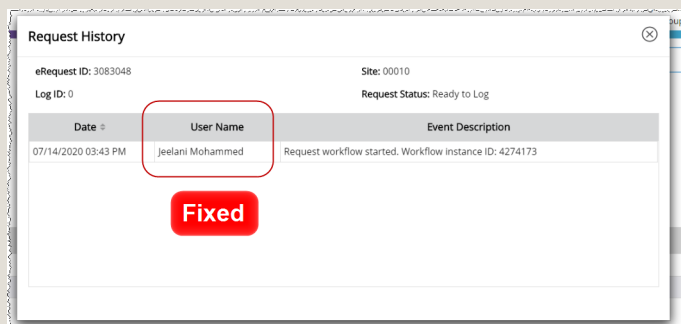
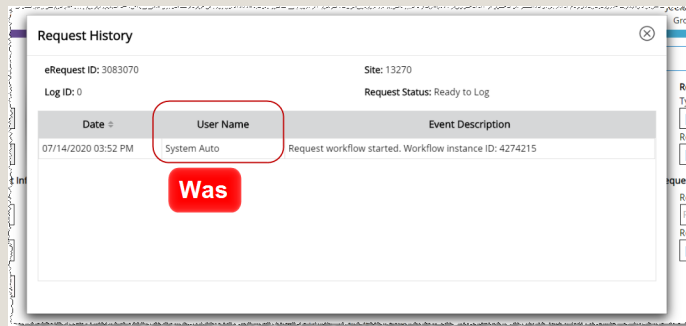
DEFECTS FIXED

v2.0 fixes these issues reported by users

Defect
<p>The Edit command is now available for Request Letters in Fulfillment, even if there is no Request Letter attached.</p>  <p>Previously, if a request was opened for Fulfillment but lacked a Request Letter, there was no way to add a Request Letter without sending it back to Logging. Now that the Resubmit to Logging command is no longer available (page 21), users must be allowed to add the letter in Fulfillment.</p>
<p>HealthSource Clarity can now create Correspondence for Non-EMR patients at EPIC sites if the request lacks the MRN value.</p> <p>Previously, we disabled Correspondence for such requests, even though MRN is not a required field for Non-EMR patients.</p>
<p>We have improved how we handle interruptions during the download of large Medical Records.</p> <p>If a request includes Medical Records so large that they were “split” into separate pieces, and a user then downloads those Medical Records, we merge them into a single file.</p> <p>Before v2.0, if the download was interrupted by an error or exception, then the next attempt at a download would target both the “merged” Medical Record file and the original “split” files.</p> <p>This problem resulted in massive file downloads which often could not be completed.</p>

Defect

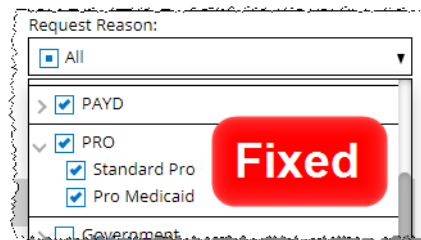
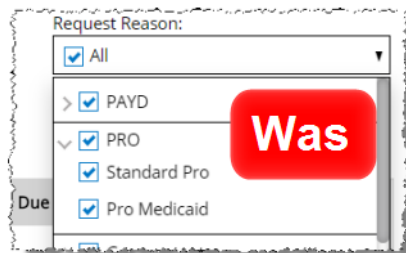
Requests created through the upload process now show the actual name of the user who uploaded the Request Letters, rather than the generic "System Auto."



Values in the **Request Reason** search field are now displayed in a hierarchical order, rather than in a "flat" list.

In the example below, note how the new display format makes it easy to see that the PRO Request Type offers two **Primary Reasons for Request**:

- Standard Pro
- Pro Medicaid



Defect

Batch request process now available even at sites for which **Digital Intake** is disabled.

Previously, batch imports failed at some sites for these Internal Requesters:

- SRP (Ciox Phoenix)
- PAYI (Indirect Payor)
- BOT (automated record retrieval)
- BHSIL

This problem occurred because the **Digital Intake** option was disabled for a site. However, **Digital Intake** was intended only to control External Requesters, not Internal.

Batch processing for Internal Requesters is no longer affected by the **Digital Intake** option.

Time out problems in **Platform Administration** have been addressed.

These problems occurred when updating **Third Party Configuration** options in the **Platform Administration** application, which controls certain **HealthSource Clarity** functions.

This problem did not affect **HealthSource Clarity** itself.