



HealthSource Clarity

v2.5 Release Notes

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HealthSource Clarity v2.5 Release Notes

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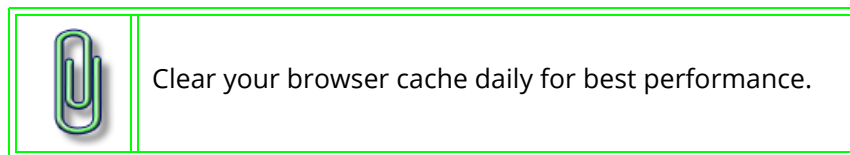
You do **NOT** need to update your **TrayApp** to use this new version.

BROWSERS USED DURING DEVELOPMENT

We used these browser versions during the development of **HealthSource Clarity v2.5**:


Browser	OS	Version / Build #
Chrome	Windows 7 or 10	85
Internet Explorer	Windows 7	11.0.9600.18617
Internet Explorer	Windows 10	11.356.18362.0
Edge	Windows 10	85

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



MONITOR THE UPLOAD REQUEST LETTER INTAKE METHOD

You can now see all attempts to create requests through the **Upload Request Letters** command.



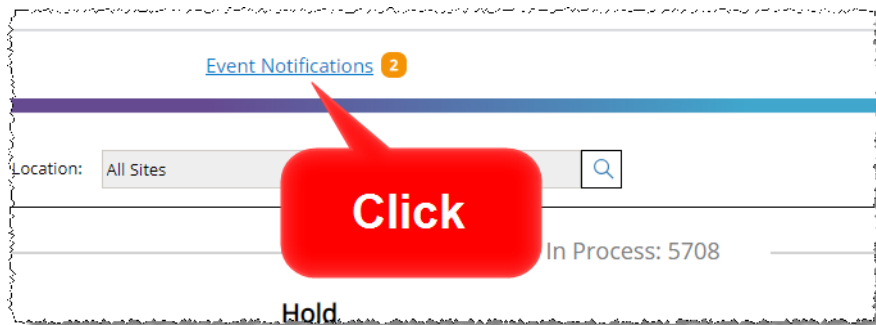
If your Site uses the **Upload Request Letters** command, we suggest that you check for failures at least once a day and resolve them yourself ([page 9](#)) whenever possible.

You can then take action to fix any failures, so that requests aren't "missing." Turn-around times and customer satisfaction have been hurt by a lack of visibility into the **Upload Request Letters** option.

Meaning of "Failure"	A PDF was successfully uploaded BUT we did not create a request from it. The tracker does not list PDFs that simply failed to upload. You see those immediately on the Upload Request Letters page.
Time period	By default, the list shows uploaded PDFs over the last 60 calendar days. You can search for uploads further back than 60 days.
Users and Sites	Shows uploads by ANY user at ANY site to which you have access.
Availability	Everyone with access to the Upload Request Letters command, which includes almost all users.

Check the Status of uploaded Request Letters

1. Click the **Event Notifications** link.
 - 1.1 Even if the **Event Count** shows 0, you can still see information about past uploads. It shows **2** in the example below.
 - 1.2 If the **Event Notifications** link is not visible, there are no tracked events — **Messages, Uploaded Request Letters, or Document Transmission** issues.



2. Click the **Request Letter Upload** tab.

- 2.1 The number to the right of the tab name shows how many failures are currently listed. In the example, there are **2** failures. This number can change if you update the list via searching or if you fix failed uploads, as described on [page 9](#).

User Name	Site ID	File Name	eRequest ID	Count	Status	Upload Time	Last Update Time	Page Count	Action Taken
Jeelani Mohammed	29006	Request letter.pdf		0	Failure	09/16/2020 12:10 PM	09/16/2020 03:38 PM	1	<input type="checkbox"/>
Jeelani Mohammed	01246	Request letter.pdf		0	Failure	09/15/2020 09:28 PM	09/15/2020 09:28 PM	1	<input type="checkbox"/>
Groupadministrator Mar	00010	scenarios.pdf		0	In Progress	09/10/2020 01:25 PM	09/10/2020 01:25 PM	3	
Imad Khad	04944	Sample request letter	10536150	1	Success	09/17/2020 11:28 AM	09/17/2020 11:28 AM	1	
Imad Khad	29007	Sample request letter	10536149	1	Success	09/17/2020 11:27 AM	09/17/2020 11:27 AM	1	
Jeelani Mohammed	01246	MISC DOC.pdf		5		09/17/2020 09:27 AM	09/17/2020 09:28 AM	5	
Jeelani Mohammed	01246	sample_certificate		2		09/17/2020 09:15 AM	09/17/2020 09:15 AM	2	
Jeelani Mohammed	01246	Request letter.pdf		1		09/17/2020 09:12 AM	09/17/2020 09:12 AM	1	
Jeelani Mohammed	12122	two.pdf	10536061	1	Success	09/17/2020 05:12 AM	09/17/2020 05:13 AM	1	
Jeelani Mohammed	12122	four.pdf	10536060	1	Success	09/17/2020 05:12 AM	09/17/2020 05:13 AM	1	

3. By default, the list includes all uploads over the previous 60 days (success and failures), with any failures shown at the top.

Failed uploads	Any uploaded PDF files that did NOT result in the creation of a request are HIGHLIGHTED IN RED .
Search for specific uploads	You can search for specific upload files by file name and / or date range. You can search further back than the default 60 day display period.
Sort	<p>Click these column headers to sort the list:</p> <ul style="list-style-type: none"> • User Name • Site ID • File Name • Status • Upload Time • Last Update Time <p>The other columns are not sortable.</p>

Request Letter Upload Details

Column	Meaning	Populated for uploads before v2.5?
User Name	Who uploaded the file.	Yes
Site ID	Site for which the Request Letter was uploaded.	No
File Name	Name of the uploaded PDF file.	Yes
eRequest ID	This column only shows requests created automatically from the uploaded file. It will NOT show requests created later by: <ul style="list-style-type: none"> • the Split command. • the Pull List option. 	Yes
Count	Number of requests created from the uploaded PDF.	Yes
Status	<ul style="list-style-type: none"> • In Progress • Success • Failure 	No
Upload Time	When the file was submitted.	Yes
Last Update Time	When the request reached its current Status .	Yes
Page Count	How many pages the PDF contained. If the PDF contained multiple Request Letters but no Separator Sheets, it will result in a single request that needs to be Split or processed as a Pull List .	No
Action Taken	This column contains a checkbox if the upload Status = <ul style="list-style-type: none"> • Failure • In Progress <p>See page 9 for instructions on using this checkbox to show that you “fixed” a failure or a “stuck” upload.</p>	N/A

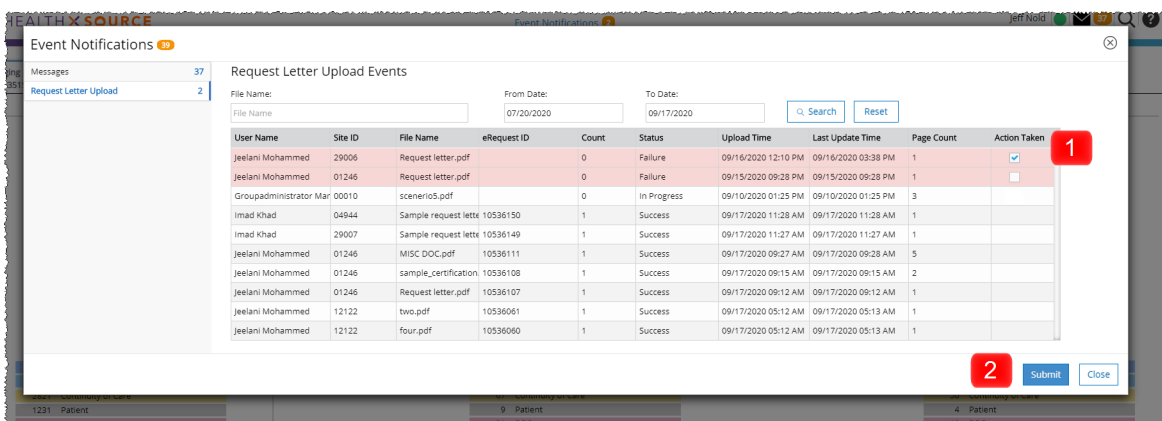
Handle a failed or stuck upload

If the upload **Status** is Failure or In Progress, you can take action to fix it.

For In Progress uploads, you should only take action if you're sure that the upload is "stuck" and won't lead to the creation of a request. We suggest waiting at least one full day before marking an In Progress request as **Action Taken**.

There is no such recommended waiting period for failed uploads. You can mark a Failure as **Action Taken** as soon as you see it. If you fix a failure but don't use the **Action Taken** flag, other people may try to fix it, too, which leads to duplicate requests.

1. On the **Request Letter Upload Events** tracker, click the **Action Taken** check box for the upload.
 - 1.1 You can select multiple requests. We only show one selection in the example.
 - 1.2 The example shows a Failure, but it's the same process for In Progress uploads.
2. Click the **Submit** button.



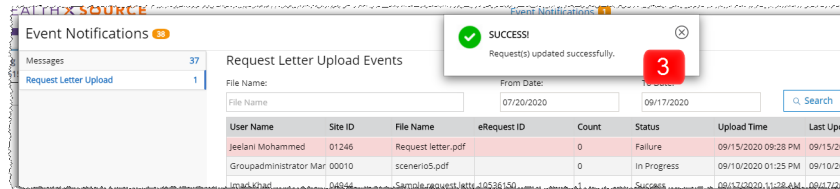
The screenshot shows the 'Request Letter Upload Events' tracker. The table contains the following data:

User Name	Site ID	File Name	eRequest ID	Count	Status	Upload Time	Last Update Time	Page Count	Action Taken
Jeelani Mohammed	29006	Request letter.pdf		0	Failure	09/16/2020 12:10 PM	09/16/2020 03:38 PM	1	<input checked="" type="checkbox"/>
Jeelani Mohammed	01246	Request letter.pdf		0	Failure	09/15/2020 09:28 PM	09/15/2020 09:28 PM	1	<input type="checkbox"/>
Groupadministrator Mar	00010	scenerio5.pdf		0	In Progress	09/10/2020 01:25 PM	09/10/2020 01:25 PM	3	<input type="checkbox"/>
Imad Khad	04944	Sample request lette	10536150	1	Success	09/17/2020 11:28 AM	09/17/2020 11:28 AM	1	<input type="checkbox"/>
Imad Khad	29007	Sample request lette	10536149	1	Success	09/17/2020 11:27 AM	09/17/2020 11:27 AM	1	<input type="checkbox"/>
Jeelani Mohammed	01246	MISC DOC.pdf	10536111	1	Success	09/17/2020 09:27 AM	09/17/2020 09:28 AM	5	<input type="checkbox"/>
Jeelani Mohammed	01246	sample_certification	10536108	1	Success	09/17/2020 09:15 AM	09/17/2020 09:15 AM	2	<input type="checkbox"/>
Jeelani Mohammed	01246	Request letter.pdf	10536107	1	Success	09/17/2020 09:12 AM	09/17/2020 09:12 AM	1	<input type="checkbox"/>
Jeelani Mohammed	12122	two.pdf	10536061	1	Success	09/17/2020 05:12 AM	09/17/2020 05:13 AM	1	<input type="checkbox"/>
Jeelani Mohammed	12122	four.pdf	10536060	1	Success	09/17/2020 05:12 AM	09/17/2020 05:13 AM	1	<input type="checkbox"/>

3. You'll receive a **Request(s) Updated Successfully** message.

3.1 This message does **NOT** mean that we created a request from the PDF. You still need to upload the file again yourself.

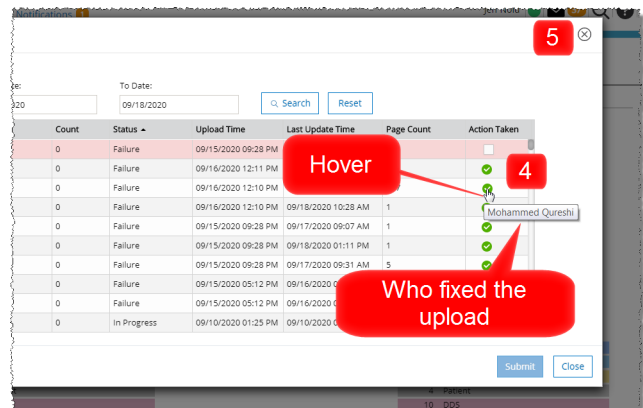
3.2 Think of **Action Taken** as putting a yellow sticky note on the upload. It's marked, but not actually fixed until you do more.



4. The **Status** of the upload will remain Failure or In Progress, but you'll see a checkmark inside a **GREEN CIRCLE** in the **Action Taken** column.

4.1 If someone else fixed the upload, you can see the user name by "hovering" your cursor over this checkmark.

4.2 "Fixed" uploads are shown at the bottom of the list. To move them nearer the top, sort by the **Status** column.



5. Close the **Event Notifications** window.

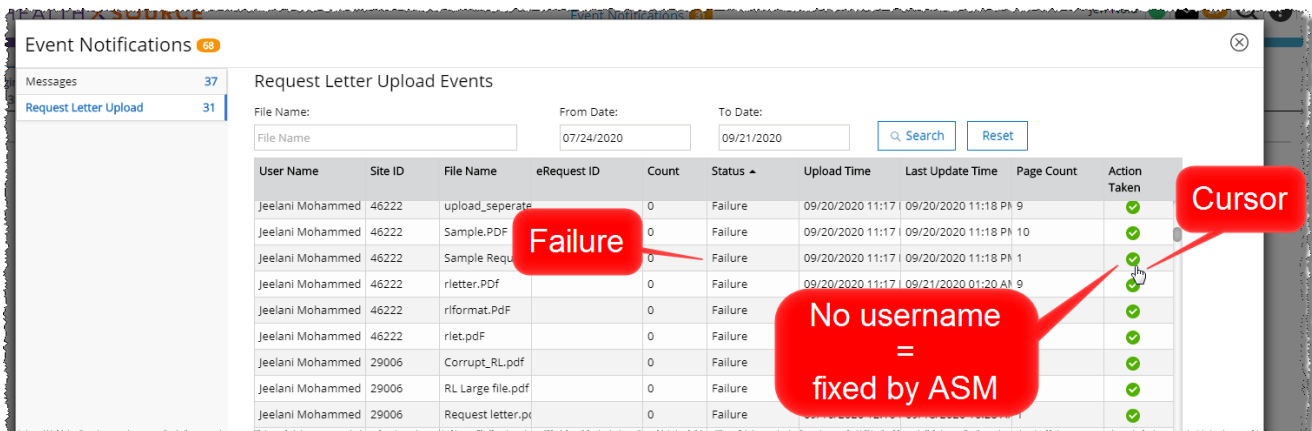
6. Use **Upload Request Letters** to submit a new Request Letter PDF.

7. After uploading the "replacement" PDF, check the **Request Letter Upload Events** tracker. It may take several minutes for the PDF to move from In Progress to Success or Failure.

What if you don't upload a failed Request Letter again?

If the request isn't high priority, you may choose to "ignore" the failure rather than fixing it as described on [page 9](#).

1. At the end of most work days, the Application Support Management (ASM) team looks for failed uploads that are **NOT** marked as **Action Taken**.
2. The team then tries to reprocess the PDF that was originally submitted.
3. If the reprocessing succeeds:
 - 3.1 the **Status** of the upload remains Failure;
 - 3.2 a checkmark appears in the **Action Taken** column;
 - 3.3 No user name appears if you hover the cursor over the **Action Taken** checkmark.



User Name	Site ID	File Name	eRequest ID	Count	Status	Upload Time	Last Update Time	Page Count	Action Taken
Jeelani Mohammed	46222	upload_separate		0	Failure	09/20/2020 11:17	09/20/2020 11:18 PM	9	✓
Jeelani Mohammed	46222	Sample.PDF		0	Failure	09/20/2020 11:17	09/20/2020 11:18 PM	10	✓
Jeelani Mohammed	46222	Sample Requ		0	Failure	09/20/2020 11:17	09/20/2020 11:18 PM	1	✓
Jeelani Mohammed	46222	rletter.PDF		0	Failure	09/20/2020 11:17	09/21/2020 01:20 AM	9	✓
Jeelani Mohammed	46222	rformat.Pdf		0	Failure				✓
Jeelani Mohammed	46222	rlet.pdf		0	Failure				✓
Jeelani Mohammed	29006	Corrupt_RL.pdf		0	Failure				✓
Jeelani Mohammed	29006	RL Large file.pdf		0	Failure				✓
Jeelani Mohammed	29006	Request letter.pt		0	Failure				✓

Keep two important facts in mind:

- the ASM team may not be able to reprocess failed uploads every day. Other critical business tasks may take priority.
- Sometimes, the ASM team can't fix the problem. The PDF may be corrupt or deleted.

CHANGES TO DUE DATE CALCULATIONS

Major Class	Requester Type	Primary Reason for Request	Due Date Facility Received Date +	
			Now	Was
Insurance Company	Insurance	Audit of Claims	15	30
Indirect Payor	PAYI	DRG / Payment Integrity	15	30
Copy Service	Insurance	Audit of Claims	15	30
Direct Payor	PAYD	DRG	15	30
Direct Payor	PAYD	ACA HIX — Health Insurance Exchange	365	30
		Ciox Audit		
		CIOX Real-World Data Team Request		
		Claim		
		General Attorney		
		General Attorney Subpoena		
		HEDIS Audit		
		MRA — Medicare Risk Assessment		
		RADV — Risk Adjustment Data Validation		
		SSA Appeal		
		Underwriting		
		Workers Comp		
Workers Comp Subpoena				

Any requests for which the **Due Date** has already been calculated will **NOT** be changed.

IMPROVED WORKFLOW

HealthSource Clarity v2.5 makes many serious improvements to the underlying workflow that moves requests through the ROI process.

There is **NO** change to the **Request Status** values or the steps through which requests pass. For example, requests can still move through any or all of:

- **Logging**
- **Fulfillment**
- **Requester Setup**
- **Certification**
- **Packaging**
- **Delivery**

We've simply "smoothed out" some troublesome areas in the underlying software that moves requests from one step to another.

The only noticeable change should be a **DECREASE** in the number of requests that can only be "unstuck" or reset by calling Support.

DEFECTS FIXED

v2.5 fixes these issues reported by users

Defect
<p>The Upload Request Letter function failed to create requests if a network problem prevented HealthSource Clarity from automatically evaluating the pages of the uploaded PDF.</p> <p>See page 5 for other changes to the Upload Request Letter function.</p>
<p>Request “froze,” requiring a user to close and restart the application, when:</p> <ol style="list-style-type: none"> 1. Request was a Potential Duplicate; 2. User viewed the <u>Request Letter</u> in the Documents window; 3. User changed or added any Patient Information; 4. User tried to view the <u>Medical Records</u> in the Documents window.
<p>Requests could not be successfully submitted after being restored because HealthSource Clarity could not extract data from the <u>Request Letter</u>.</p>
<p>Users received Messages about a request even if the request was associated with an inactive site — a site that had been terminated since the request was originally submitted.</p>
<p>The Submit to Requester Support command is no longer available for requests in the <u>Fulfillment Quality Control</u> status.</p> <p>The correct requester is always assigned earlier in the workflow than <u>Fulfillment Quality Control</u>. Allowing these requests to be sent to Requester Support could delay the delivery of Medical Records.</p>
<p>Site-level settings could not be saved in the Platform Administration application, used to configure many aspects of HealthSource Clarity.</p> <p>This problem did NOT affect HealthSource Clarity directly.</p>