

HealthSource Clarity

v5.0 Release Notes

August 2021



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 v5.0 Release Notes

See the following sections for detailed information on the changes made in this release.

Features

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PRE-DELIVERY VIEW & APPROVE

Routes requests to Awaiting Delivery Approval status after fulfillment of the MR **if** the Site and Requester are both configured.

Requests will remain in this Awaiting Delivery Approval status until approved for delivery or disapproved and sent back to Fulfillment Exceptions.

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Based on User Roles/Permissions, users will be able to perform the following functionality:

• Approve (1 or more) from the Request Search screen

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• Disapprove (1 or more) from the Request Search screen

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• Approve from within Request Screen after reviewing

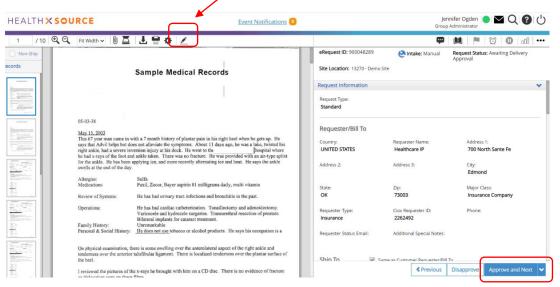
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1 / 10 🤆	🔍 🔍 🛛 Fit Width 🗸 🗍 💆	± 음 ¢ ∠		φ.			õ	0	o0]	••••
Non-Ship lecords		Sample Medical Records	eRequest ID: 900048289 Site Location: 13270 - Demo Site	🐣 Intake: Manual	Reque: Approv		: Awaitin	g Deli	very	
			Request Information Request Type: Standard							*
	says that Advil helps but do right ankle, had a severe inv he had x-rays of the foot an	tith a 7 month history of plantar pain in his right heel when he gets up. He es not alleviate the symptoms. About 11 days ago, he was a lake, twisted his restion injury at his dock. He went to the []hospital where a lake lakes. There was no fracture. He was provided with an air-type splint splying i.e., and more recently alternating i.e and heat. He says the ankle	Requester/Bill To Country: UNITED STATES Address 2:	Requester Name: Healthcare IP Address 3:		Address 1 700 Nor City: Edmond	th Sante	Fe		_
	Allergies: Medications: Review of Systems:	Sulfa Paxil, Zecor, Bayer aspirin 81 milligrams daily, multi vitamin He has had urinary tract infections and bronchitis in the past. He has had cardiac catheterization. Tonsillectomy and adenoidectomy.	State: OK	Zip: 73003		Major Cla Insurano	iss: ce Compa	any		
	Operations: Family History: Personal & Social History:	He has hac catulac canneterrations. Tomainecomy and ascinotectomy. Varicocele and hydrocele surgeries. Transurethral resection of prostate. Bilaterial implants for cataract treatment. Untremarkable <u>He does not use</u> jobaceo or alcohol products. He says his occupation is a	Requester Type: Insurance Requester Status Email:	Ciox Requester ID: 2262492 Additional Special Notes:	1	Phone:				
	tenderness over the anterior the heel.	ere is some swelling over the anterolateral aspect of the right ackle and tabibibular ligament. There is localized tendemess over the plantar surface of the plantar surface of the second s	Shin To 🖉 Same	Customer Requester/Bill	Disapp	rove	Approv	ve and	d Next	~

• Disapprove from within Request Screen after reviewing – adding disapproved comment so fulfiller can correct the MR

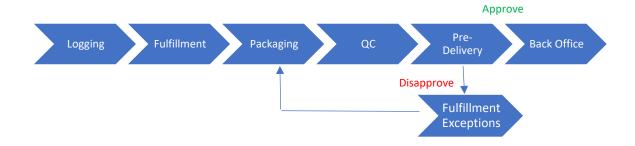
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Non-Ship ecords		Sample Medical Records	5	eRequest ID: 900048289 Site Location: 13270 - Demo S	ite	Request Status Approval	Awaiting De	elivery
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				Request Type: Standard				
And	05-03-38 May 15, 2003			Requester/Bill To				
	says that Advil helps but do right ankle, had a severe inv he had x-rays of the foot and	ith a 7 month history of plantar pain in his righ es not alleviate the symptoms. About 11 days a ersion injury at his dock. He went to the d ankle taken. There was no fracture. He was p	ago, he was a lake, twisted his hospital where provided with an air-type splint	Country: UNITED STATES	Requester Name: Healthcare IP	Address 1 700 Nort	: th Sante Fe	
	swells at the end of the day.	pplying ice, and more recently alternating ice a	nd heat. He says the ankle	Address 2:	Address 3:	City: Edmond		
8	Allergies: Medications:	Sulfa Paxil, Zocor, Bayer aspirin 81 milligrams dai	-	State: OK	Zip: 73003	Major Cla	ss: e Company	,
	Review of Systems: Operations:	He has had urinary tract infections and bronc He has had cardiac catheterization. Tonsillec Varicocele and hydrocele surgeries. Transur Bilateral implants for cataract treatment.	tomy and adenoidectomy.	Requester Type:	Ciox Requester ID: 2262492	Phone:	ecompany	
16000	Family History: Personal & Social History:	Unremarkable He does not use tobacco or alcohol products.	He says his occupation is a	Requester Status Email:	Additional Special Notes:			
	On physical examination, th tendemess over the anterior the heel.	ere is some swelling over the anterolateral aspe- talofibular ligament. There is localized tender	et of the right ankle and tess over the plantar surface of	Shin To 🖉 sa	me.as.Customer.Requester All	То		
50 50	I reviewed the pictures of the	e x-rays he brought with him on a CD disc. Th	ere is no evidence of fracture		< Previou:	Disapprove	Approve a	ind Next 🐱



Edit the MR in the Awaiting Delivery Approval status without sending back to Fulfillment
 Exception



PRE-DELIVERY WORKFLOW



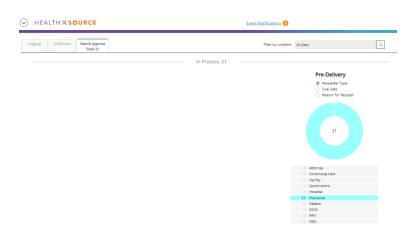


VIEW & APPROVE DASHBOARD

Requests in 'Awaiting Delivery Approval' status will display on the View & Approve tab on My Dashboards.

Users with the View & Approve permission will see the additional tab on My Dashboard.

Users with the Pre-Delivery V&A/V&A&E Roles will only see the View & Approve Dashboard tab.



PRE-DELIVERY VIEW & APPROVE ROLES/PERMISSIONS

New roles and permissions were created in Platform Admin for Pre-Delivery View & Approve access.

Pre-Delivery V&A Permission

Permission allows users to search for and access requests in the 'Awaiting Delivery Approval' Status to Review/Approve/Disapprove/Edit requests

<u>Roles</u>

Pre-Delivery V&A Capabilities:

- Only requests in Awaiting Delivery Approval Status display on the Request Search Screen
- Approve Requests
- Disapprove Requests

Pre-Delivery V&A&E Capabilities:



- Only requests in Awaiting Delivery Approval Status display on the Request Search Screen
- Edit the MR (add/remove pages/reorder) without sending to Fulfillment Exceptions
- Approve Requests
- Disapprove Requests

PRE-DELIVERY VIEW & APPROVE CONFIGURATION

Configuration for Pre-Delivery is Site AND Requester specific.

Requester must be configured for Pre-Delivery in Platform Admin – Requester Configuration



Healthsource Site Preferences – locate the site and enable Pre-Delivery Approval

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C Review	All		Health System Gr		Dashboard Group	Site Name	Site Address	City	ST	Zip	VPO	RMO
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		01742				Great Lakes Orthopae	4045 W ROYAL DR	TRAVERSE CITY	MI	49684-8965		
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Site Preference	s											
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	s		n Group			Due Date	Escalation				Ciox R	ecord Sets



In advanced Settings, expand Available Requesters (only requesters that are enabled in Platform Admin will display). Mark requester(s) and save.

2					
Site Prefer	ences				
Due Date Ru	les Advanced Settings				
	_				
wailable Reque	esters (Approval for Delivery)				
Select	Requester ID	Requester Name	Address	Requester Type	Default Delivery
V	2262492	Healthcare IP	700 North Sante Fe. Edmond. OK, USA-73003	Insurance Company	Mail
lequest Fields (Customization				

DUE DATE MANAGEMENT

HealthSource Clarity v5.0 now uses the combination of the Primary and the Secondary Reason for Request to assign the Due Date. This change is being made so there can be different Due Dates for specific Secondary reasons. You will not see any changes in the Request screen or the Due Dates upon the Release, but shortly after there will be changes to the Secondary Reason Due Dates.

In addition, future State-specific requirements can be quickly configured upon Ciox approval. Site-specific Due Dates can also be changed for special situations upon appropriate approval procedures.