



# HealthSource Clarity

v5.0 Release Notes

August 2021



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# HealthSource Clarity v5.0 Release Notes

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

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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.

HEALTHXSOURCE | Event Notifications | Jennifer Ogden, Group Administrator

Reset Criteria | Show All Search Criteria | Hide Criteria

Search | Work Item

Unique Identifier: Type of Identifier: None | Number: Enter Identifier Number

Date Range: Date Type: Intake Date | From: 02/19/2021 | To: 08/19/2021

Sites: Sites or Groups: All Sites | Accessed by: Me, All Users

Request Progress: Milestone and Status: All | Status Reason: All

Request Characteristics: Type and Requester Class: All | Request Reason: All

Total Items displayed - 23

STAT	Site ID	eRequest ID	Group ID	Requester Name	Requester Class	Patient Name	DOB	Intake Date	Facility Rcvd Date	Days Due	Request Status	Reason
<input checked="" type="checkbox"/>	13270 - Demo Site	900048289		Healthcare IP	Insurance	Four UAT	01/01/1960	08/19/2021 09:58...	08/19/2021		Awaiting Delivery Appro...	
<input checked="" type="checkbox"/>	13270 - Demo Site	900048290		Healthcare IP	Insurance	Five Test	01/01/1961	08/19/2021 10:19...	08/19/2021		Awaiting Delivery Appro...	
<input checked="" type="checkbox"/>	13270 - Demo Site	900048293		Healthcare IP	Insurance	Seven UAT	01/01/1963	08/19/2021 10:24...	08/19/2021		Awaiting Delivery Appro...	
<input type="checkbox"/>	13270 - Demo Site	900048294		Healthcare IP	Insurance	Eight UAT	01/01/1941	08/19/2021 10:28...	08/19/2021		Awaiting Delivery Appro...	
<input type="checkbox"/>	13270 - Demo Site	900048298		Healthcare IP	Insurance	Eleven UAT	09/01/1966	08/19/2021 10:37...	08/19/2021		Awaiting Delivery Appro...	
<input type="checkbox"/>	13270 - Demo Site	900048299		Healthcare IP	Insurance	Twelve UAT	01/01/1955	08/19/2021 10:37...	08/19/2021		Awaiting Delivery Appro...	
<input type="checkbox"/>	13270 - Demo Site	900048300		Healthcare IP	Insurance	Ten UAT	10/01/1954	08/19/2021 10:37...	08/19/2021		Awaiting Delivery Appro...	

Approve | Disapprove | Export

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

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

Unique Identifier: Type of Identifier: None | Number: Enter Identifier Number

Date Range: Date Type: Intake Date | From: 02/20/2021 | To: 08/20/2021

Sites: Sites or Groups: All Sites | Accessed by: Me, All Users

Request Progress: Milestone and Status: All | Status Reason: All

Request Characteristics: Type and Requester Class: All | Request Reason: All

Total Items displayed - 23

STAT	Site ID	eRequest ID	Group ID	Requester Name	Requester Class	Patient Name	DOB	Intake Date	Facility Rcvd Date	Days Due	Request Status	Reason
<input checked="" type="checkbox"/>	13270 - Dem...	900048289		Healthcare IP	Insurance	Four UAT	01/01/1960	08/19/2021 0...	08/19/2021	2	Awaiting Delivery ...	
<input checked="" type="checkbox"/>	13270 - Dem...	900048290		Healthcare IP	Insurance	Five Test	01/01/1961	08/19/2021 1...	08/19/2021	2	Awaiting Delivery ...	
<input checked="" type="checkbox"/>	13270 - Dem...	900048293		Healthcare IP	Insurance	Seven UAT	01/01/1963	08/19/2021 1...	08/19/2021	2	Awaiting Delivery ...	
<input type="checkbox"/>	13270 - Dem...	900048294		Healthcare IP	Insurance	Eight UAT	01/01/1941	08/19/2021 1...	08/19/2021	2	Awaiting Delivery ...	
<input type="checkbox"/>	13270 - Dem...	900048298		Healthcare IP	Insurance	Eleven UAT	09/01/1966	08/19/2021 1...	08/19/2021	2	Awaiting Delivery ...	
<input type="checkbox"/>	13270 - Dem...	900048299		Healthcare IP	Insurance	Twelve UAT	01/01/1955	08/19/2021 1...	08/19/2021	2	Awaiting Delivery ...	

Approve | Disapprove | Export

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

Unique Identifier: Type of Identifier: None | Number: Enter Identifier Number

Date Range: Date Type: Intake Date | From: 02/20/2021 | To: 08/20/2021

Sites: Sites or Groups: All Sites | Accessed by: Me, All Users

Request Progress: Milestone and Status: All | Status Reason: All

Request Characteristics: Type and Requester Class: All | Request Reason: All

Total Items displayed - 23

STAT	Site ID	eRequest ID	Group ID	Requester Name	Requester Class	Patient Name	DOB	Intake Date	Facility Rcvd Date	Days Due	Request Status	Reason
<input checked="" type="checkbox"/>	13270 - Dem...	900048289		Healthcare IP	Insurance	Four UAT	01/01/1960	08/19/2021 0...	08/19/2021	2	Awaiting Delivery ...	
<input checked="" type="checkbox"/>	13270 - Dem...	900048290		Healthcare IP	Insurance	Five Test	01/01/1961	08/19/2021 1...	08/19/2021	2	Awaiting Delivery ...	
<input checked="" type="checkbox"/>	13270 - Dem...	900048293		Healthcare IP	Insurance	Seven UAT	01/01/1963	08/19/2021 1...	08/19/2021	2	Awaiting Delivery ...	
<input type="checkbox"/>	13270 - Dem...	900048294		Healthcare IP	Insurance	Eight UAT	01/01/1941	08/19/2021 1...	08/19/2021	2	Awaiting Delivery ...	
<input type="checkbox"/>	13270 - Dem...	900048298		Healthcare IP	Insurance	Eleven UAT	09/01/1966	08/19/2021 1...	08/19/2021	2	Awaiting Delivery ...	
<input type="checkbox"/>	13270 - Dem...	900048299		Healthcare IP	Insurance	Twelve UAT	01/01/1955	08/19/2021 1...	08/19/2021	2	Awaiting Delivery ...	

Approve | Disapprove | Export

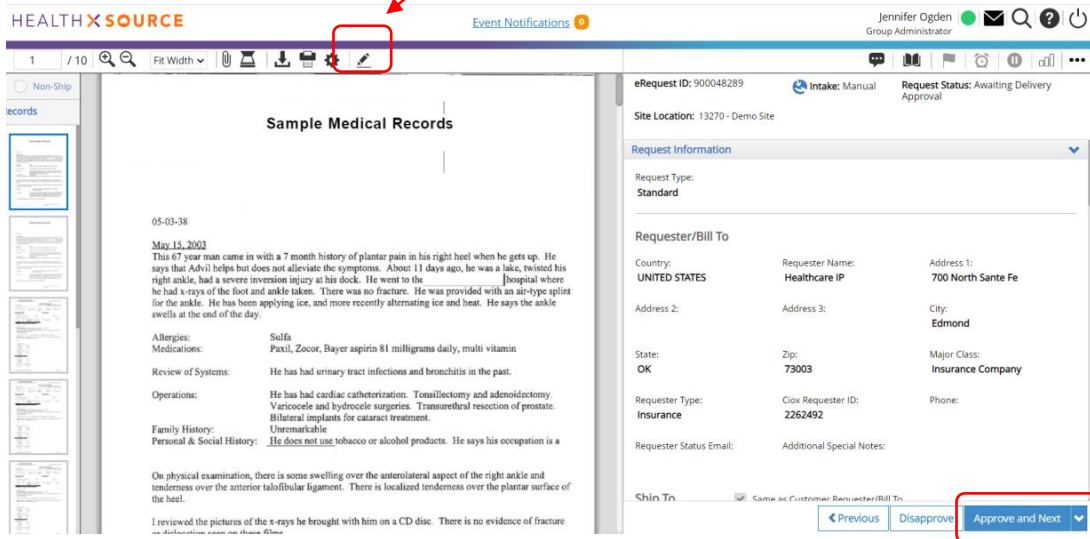
- Approve from within Request Screen after reviewing

The screenshot shows the HealthSource interface with a medical record review screen. The main content area displays 'Sample Medical Records' for a patient with a history of plantar pain. The right-hand panel shows request details, including the requester's name 'Healthcare IP' and address '700 North Sante Fe'. At the bottom of the right panel, the 'Approve and Next' button is highlighted with a red box.

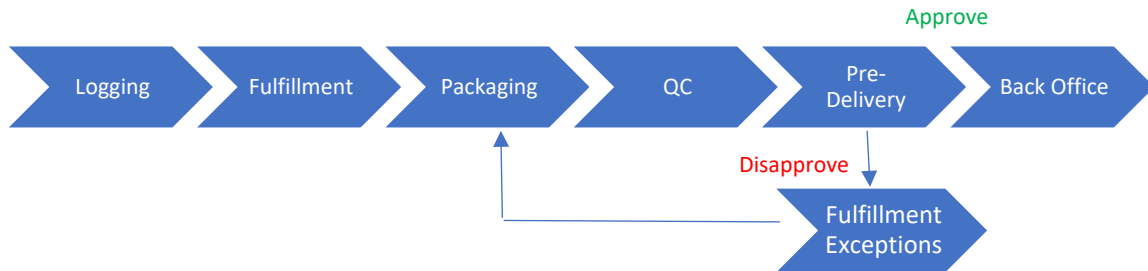
- Disapprove from within Request Screen after reviewing – adding disapproved comment so fulfiller can correct the MR

This screenshot is identical to the one above, showing the same medical record review screen. However, in this version, the 'Disapprove' button at the bottom of the right-hand panel is highlighted with a red box.

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



## PRE-DELIVERY WORKFLOW

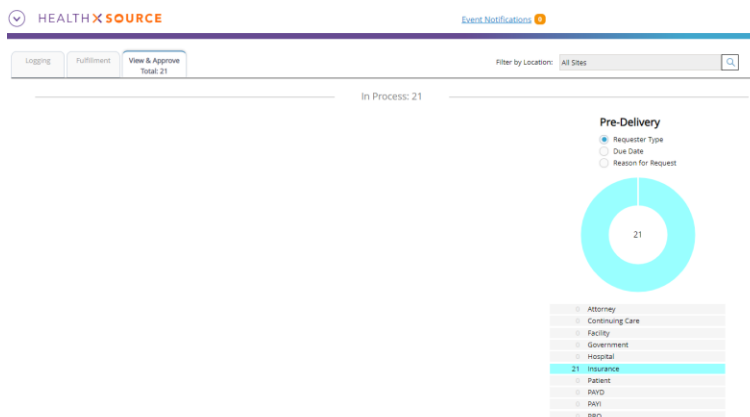


## VIEW & APPROVE DASHBOARD

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

### Roles

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

**Requester Details:**  
 Requester Number: 1962636  
 Requester Name: Syracuse Ortho Specialist DFC  
 Address: 925 N Point Pkwy  
 Alpharetta  
 GA  
 USA- 30005  
 Requester Type: Facility  
 Default Delivery: Electronic

**Approval Settings:**  
 Approval for Delivery:

**Publish Options:**  
 Status Event:  Realtime  
 Request Received:   
 Fulfillment Start:   
 Doc Types:  Realtime

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

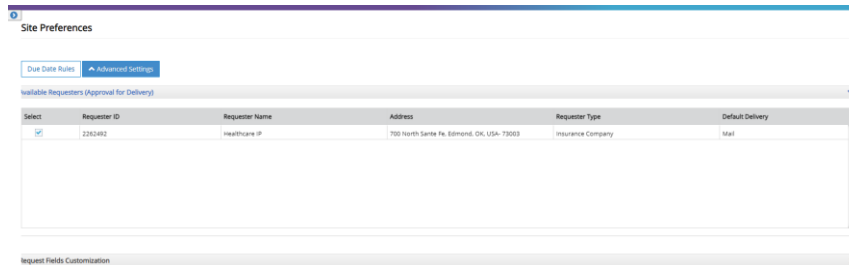
Enter text to filter Sites, and check to select Sites (0 of 5 sites)

All	Site ID	Health System Group	Dashboard Group	Site Name	Site Address	City	ST	Zip	VPO	RMO
<input type="checkbox"/>	00006			Alabama Sports Med ...	2800 UNIVERSITY BOULEVA...	BIRMINGHAM	AL	35239		
<input type="checkbox"/>	01742			Great Lakes Orthopa...	4045 W ROYAL DR	TRAVERSE CITY	MI	49684-8965		
<input type="checkbox"/>	01922			Springfield Clinic-Wom...	1135 EAST LAKEWOOD SUL...	SPRINGFIELD	MO	65810-2403		
<input checked="" type="checkbox"/>	32328			Hayward Area Memori...	11040 N STATE ROAD 77	HAYWARD	WI	54843-6391		
<input type="checkbox"/>	46770			Iberia Med Center	2315 E MAIN ST	NEW IBERIA	LA	70562		

Site ID	Site Name	Health System Group	Approval for Fulfillment	Approval for Delivery	Due Date Management	Escalation	Read-only Correspondence	Ciox Record Sets
32328			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>



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



## 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.