A

Ciox Health Client HealthSource Clarity Quick Start Guide

Version: 1.5

Release Date: 2.6.20

Creating a Username and Password for HealthSource Clarity

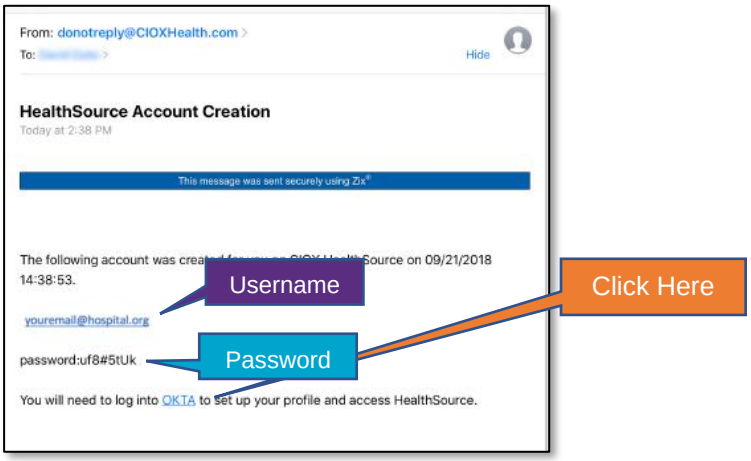
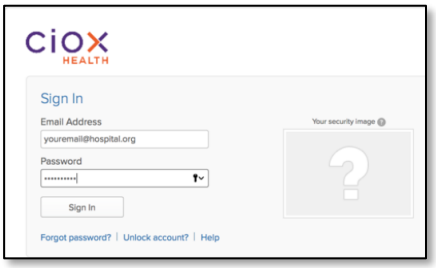
Introduction

HealthSource Clarity is designed for providers and health systems utilizing the latest in Artificial Intelligence to ensure medical records are securely obtained, authenticated and delivered to requestors with the most efficient process possible. Developed in collaboration with Health Information Management, Clarity ensures that the release of protected health information is preformed accurately, securely and with an understanding that each record represents a real person.

In order to access Clarity, you must have a username and password. This document describes the process to obtain.

Process

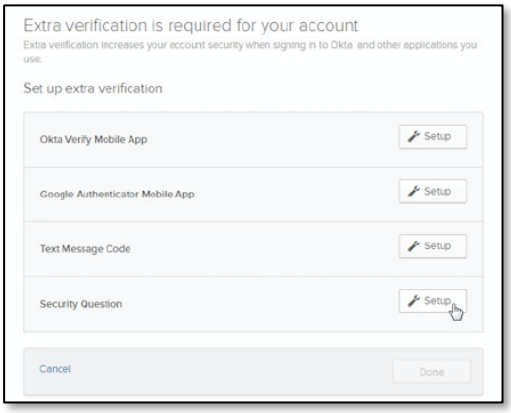
Follow these steps to create your username and password:

Step	Action
1	Contact your Ciox Representative to get the process started.
2	You will receive an email from Ciox with a link to set up your profile. Ciox uses a single sign-on service to manage authentication into all Ciox applications. (This link will expire, so please take action within 2 business days.) 
3	Log in with your email address and the temporary password provided in the email you received from Ciox. 

Continued on next page

© 2020, Ciox Health. All Rights Reserved

Process, continued

Step	Action
4	Select one of the Extra Verifications, click **Setup** We recommend you use a Security Question: • Select and answer a verification question. • Click “Save” • Click “Done” when returned to this page 
5	Change your Temporary Password. Password requirements: Password requirements: at least 8 characters, a lowercase letter, an uppercase letter, a number, no parts of your username. • Your Current Password was provided in the email you received from Ciox. • Select a new password and confirm it. • Click “Change Password”
6	Optional: • You can set up a secondary email. This is helpful if you forget your password or lock your account. • Select a secondary “Forgot Password Question” and enter an answer. • Add a phone number to receive a text message to reset your password or unlock your account. • Click a picture to select your personal Security Image.
7	Click “Create My Account”.
8	Click “Got It”. Select your username in the upper right corner and select “Sign out”.

In the event you enter the incorrect password 5 times, your account will be disabled and you need to contact the Ciox Health IT Service Desk: 1-877-358-6939, ext. 3 or email servicedesk@cioxhealth.com

© 2020, Ciox Health. All Rights Reserved

Password Expiring Notification and Instructions

Password Expiring Notifications

- HealthSource Active Passwords will expire every 60 days
- Any active account where a password is going to expire receives an email notification on day 14,7,5,3,2,1 and 0
- The email notification will be sent from noreply.pwd@cioxhealth.com
- Please check your spam folder to ensure these notifications are coming to your inbox
- The notification email will contain a link to start the HealthSource password reset process.

** **Note**: you must login at least once every 30 days to keep your account active.

Example:

5/22/2019 YOPmail - Mail viewer

ATTENTION: Your Ciox Health Password Expires in 14 days
From: <noreply.pwd@cioxhealth.com>
Date: 2019-05-22 07:44

Dear [illegible],

Your Ciox HealthSource account is expiring in 14 days.

To avoid interruption of service, please copy or click the visit Password Reset Site link below to begin with your user account name.

Your User Account Name: [illegible]

Password Reset Site: https://cioxhealth.okta.com/reset-password

Please contact the Ciox Health IT Service Desk for additional assistance.

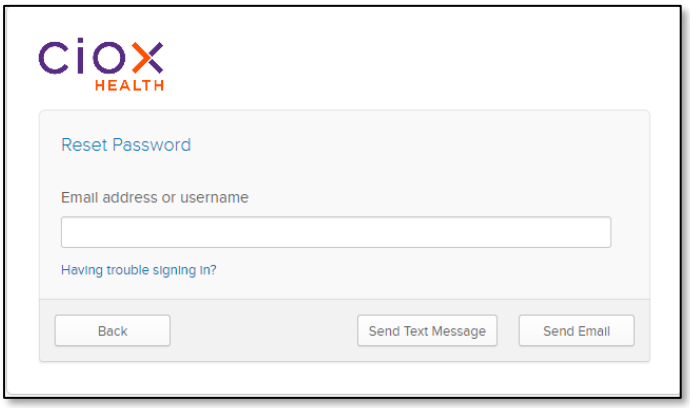
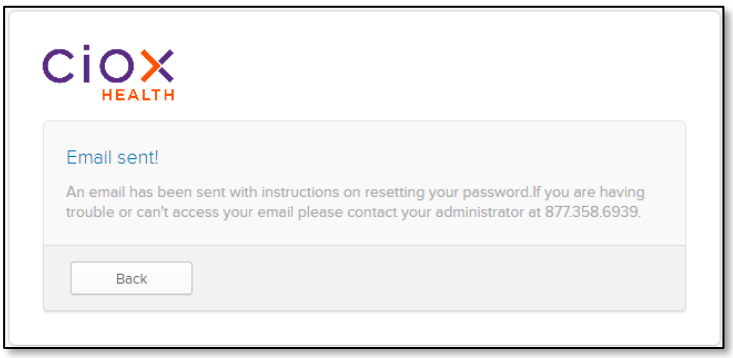
Thank You,
Ciox Health
servicedesk@cioxhealth.com
(877) 358-6939

Continued on next page

© 2020, Ciox Health. All Rights Reserved

How to Reset Your Password

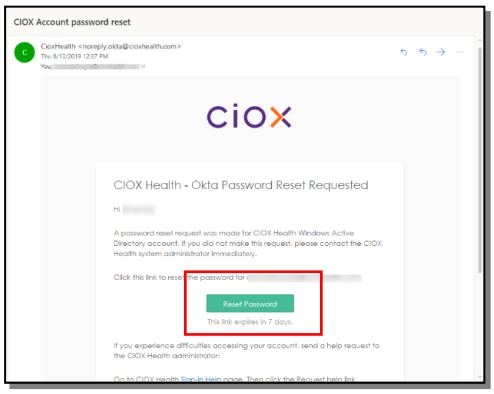
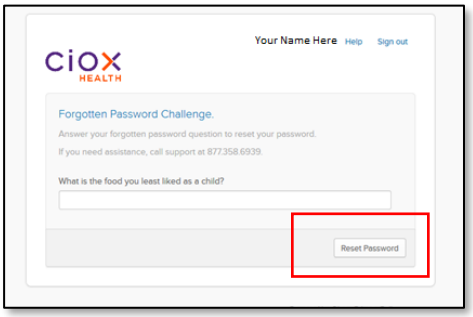
Follow these steps to Reset your password:

Step	Action
1	Go to the following link to reset your password: • https://cioxhealth.okta.com/reset-password
2	Enter the email address for the password that needs to be reset and choose whether you want the reset instructions to be sent via text message or email (best is via email). 
3	You will receive a confirmation message that the email has been sent. 

Continued on next page

© 2020, Ciox Health. All Rights Reserved

Password Expiring Notifications, continued

Step	Action
4	Check your email inbox for the below message from “Noreply.okta@CioxHealth.com” and click **Reset Password** button to continue. 
5	The following screen will be displayed to answer the security question you originally set, then click reset password button. 
6	After successfully answering the security question, you will enter a new password following the password requirements mentioned previously. and click Reset Password.
7	After successfully resetting your password, the user password page will be displayed. The browser can be closed and you can now log into HealthSource using: https://unity.cioxhealth.com/cipui/#/login,

© 2020, Ciox Health. All Rights Reserved

Logging into HealthSource Clarity

How to Login

Follow these steps to login to HealthSource Clarity:

Step	Action
1	Browse to: https://unity.cioxhealth.com/cipui/#/login
2	Sign in with your email address on the initial screen.
3	Enter your password
4	Select Sign In

Best Practice: use Chrome instead of Internet Explorer. Save the HealthSource Clarity website as a favorite for future use.

Logging Out

To log out of HealthSource, simply click on the **Power** symbol in the upper-right corner of the screen.

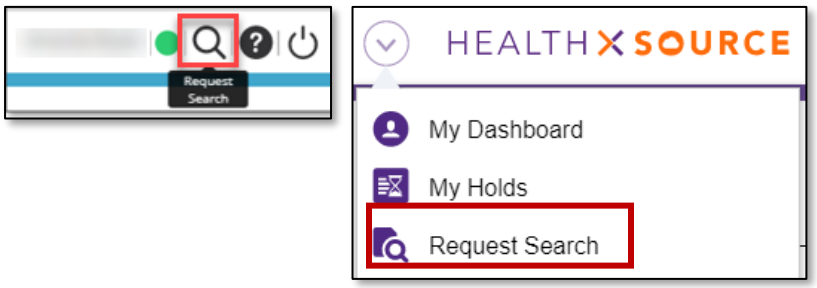
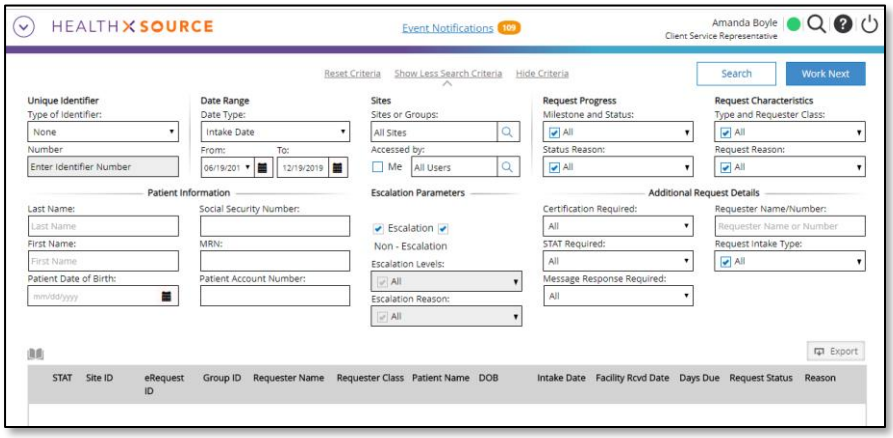
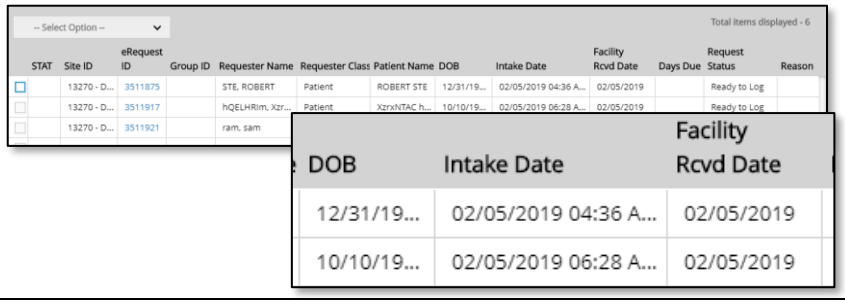
You must login to HealthSource Clarity at least once a month (30 days) to keep the account enabled. If you are deactivated, please reach out to your local Ciox Health representative for assistance in resetting a password or contact 1-877-358-6939 ext. 3.

© 2020, Ciox Health. All Rights Reserved

Searching for a Request in HealthSource Clarity

Purpose The Request Search tool offers many search fields and allows you to open a read-only version of the request, even after it has been fulfilled.

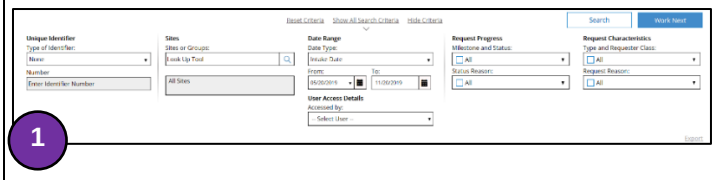
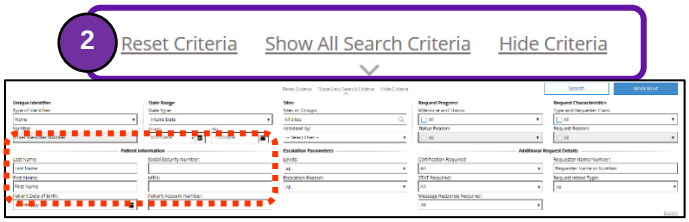
Steps to Search for a Request:

Screenshot	Steps
	Click the **Request Search** magnifying glass button or press **ALT + G** on your keyboard. ***Or*** Select the HealthSource **Menu** and then select **Request Search.**
	On the **Request Search** page, enter the appropriate search criteria, then click **Search** or press the **ENTER** key **The **Request Search** finds requests that match **ALL** of your search criteria. Be specific enough to find what you're looking for, but not so specific that you accidentally exclude requests that you'd like to see.
	The **Search Results** table shows matching requests. You can sort the search results by clicking a column label. Click on an eRequest ID to be taken to the request.

Continued on next page

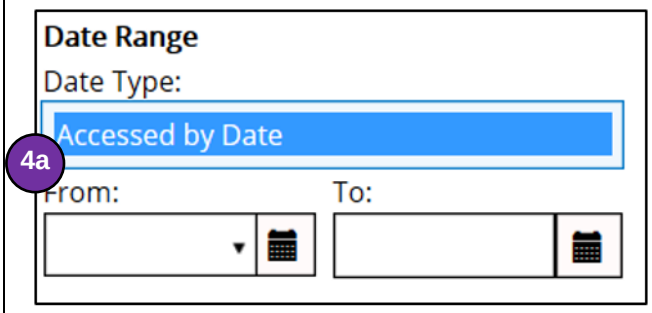
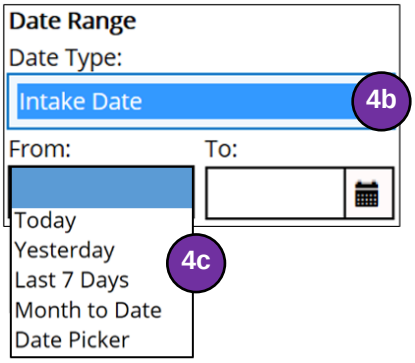
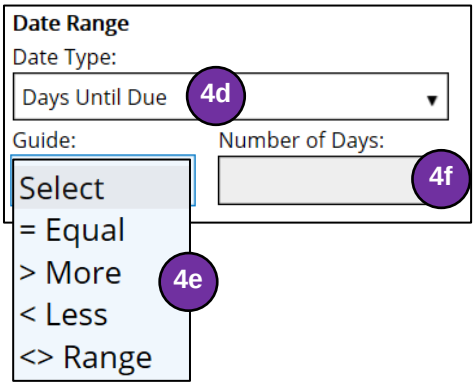
© 2020, Ciox Health. All Rights Reserved

Search Fields

Field	Description	
1	**Search Criteria** The **Search Criteria** fields are organized in columns showing the most frequently used options at the top with the ability to expand the screen to show additional options.	
2	**Criteria Options** **Reset Criteria**: Clears selections. **Show All Search Criteria**: Expands the criteria to show additional search options, including Patient Information such as SSN, MRN or Patient Account Number. **Hide Criteria**: Collapses the criteria to show less options and more results.	
3	Some of the fields require **exact matches only**. For example, searching for 123 as the Social Secuirty Number will not return any results, even if there are requests that include 123.	

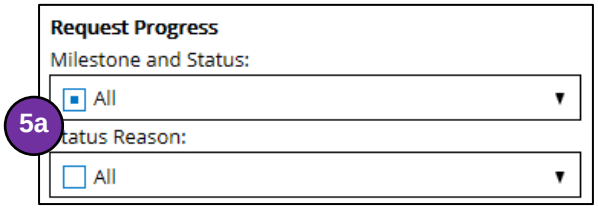
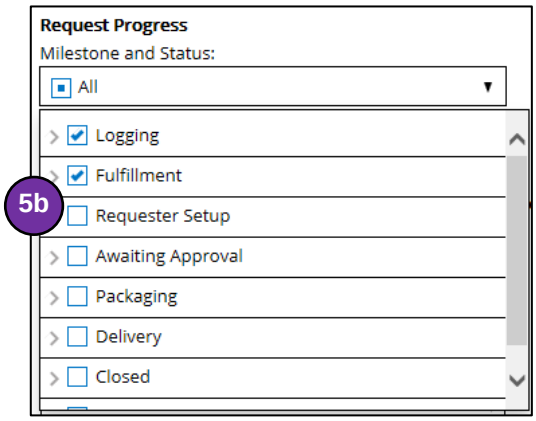
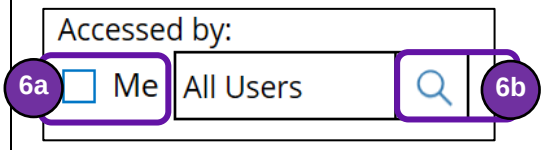
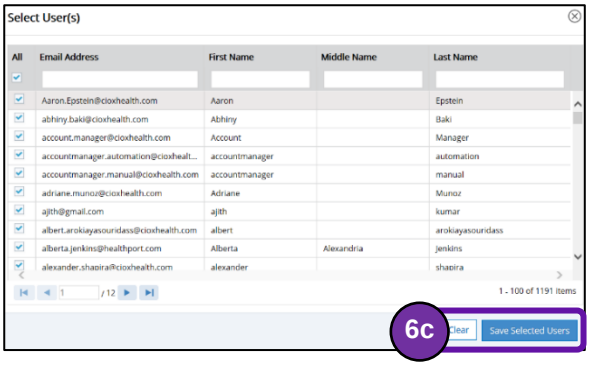
Continued on next page

© 2020, Ciox Health. All Rights Reserved

Field	Description	
4	**Date Range** a) The Date Type finds requests by: • Accessed date • Days Until Due • Due Date • Facility Received Date • Intake Date	
	From/To: b) **IF** you choose any of these **Date Type** options: • Accessed by Date • Due Date • Facility Received Date • Intake Date c) **THEN** you can choose new pre-defined options in the From/To: field. All start and stop times are based on Eastern time. They are NOT adjusted for your local time zone.	
	The new **Days Until Due** locates requests based on the time remaining before they are due to be delivered: d) Select Days Until Due in the Date Type field. e) Choose the appropriate Guide option. f) Enter the Number of Days or From/To: values.	

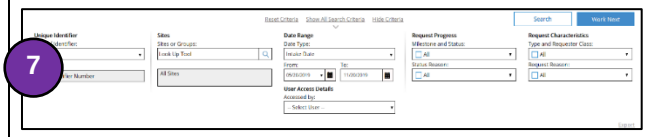
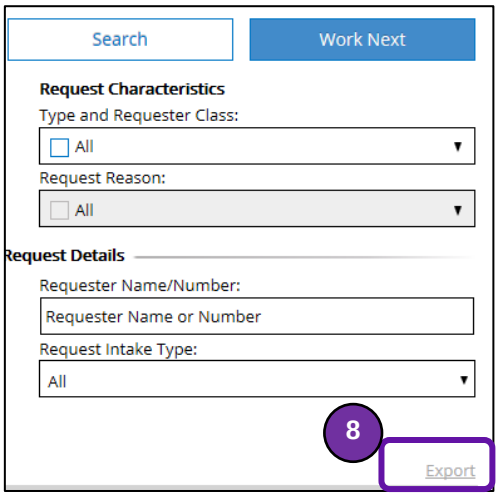
Continued on next page

© 2020, Ciox Health. All Rights Reserved

Field	Description	
5	**Request Progress** a) You can make multiple choices in **Milestone**, **Status** and **Reason**. b) Based on the Milestone(s) selected, you can limit the search to specific Status values. If the Status choice isn't listed, make sure the **correct "parent" milestone** is selected. **Note**: A checkmark in the Milestone **All** box search options means all statuses within the Milestone are checked. If there is a square dot, then less than all of the status options are checked.	 
6	The **Accessed by** search field finds requests that were opened by a user or multiple users. a) To find requests that you worked on, checkmark the **Me** box. b) To find requests that other users accessed, click Look Up Users magnifying glass. c) The Select User(s) window appears. Select users (only users for sites you have access to will appear). After selection, click **Save Selected Users**. **What does "access" mean?** When a request is opened, it is immediately considered accessed. No work tasks are required.	 

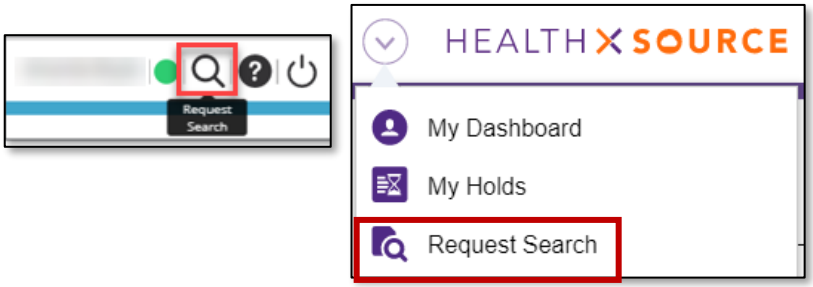
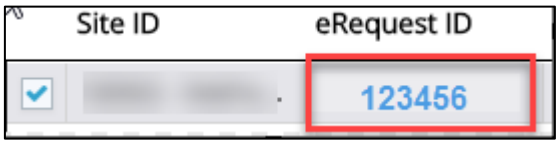
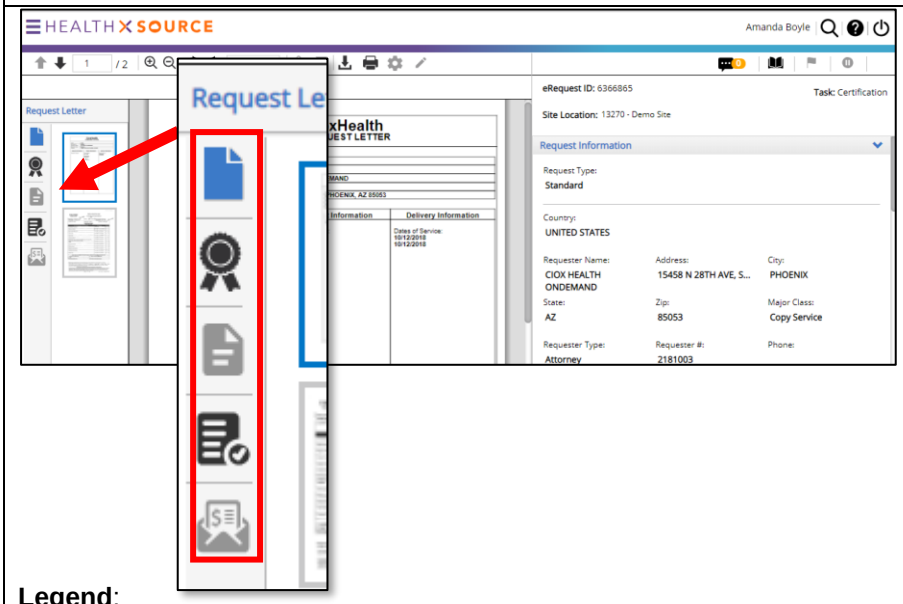
Continued on next page

© 2020, Ciox Health. All Rights Reserved

Field	Description	
7	**Search Criteria And Search Results Retained** Any Search Criteria field choices you make are retained as long as you are logged in to HealthSource Clarity. In the same way, your Search Results are always displayed until you either run a new search or log out and back in. Your selected search criteria are cleared when you log out, close the application or click Reset Criteria.	
8	**Export Search Results to Excel** The new Export command downloads your Search Results and Search Criteria to an Excel spreadsheet. Then, you can use Excel commands to sort and edit the data.	

© 2020, Ciox Health. All Rights Reserved

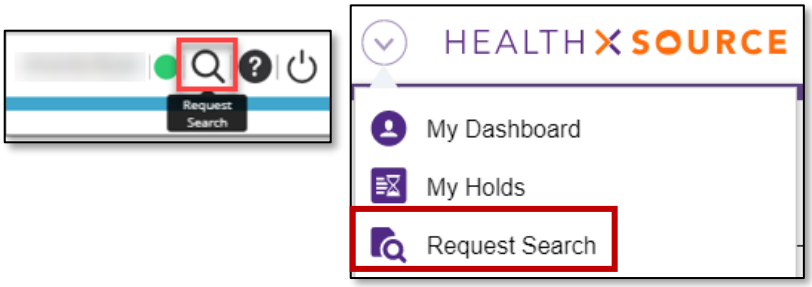
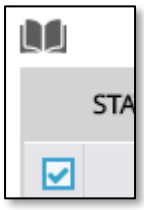
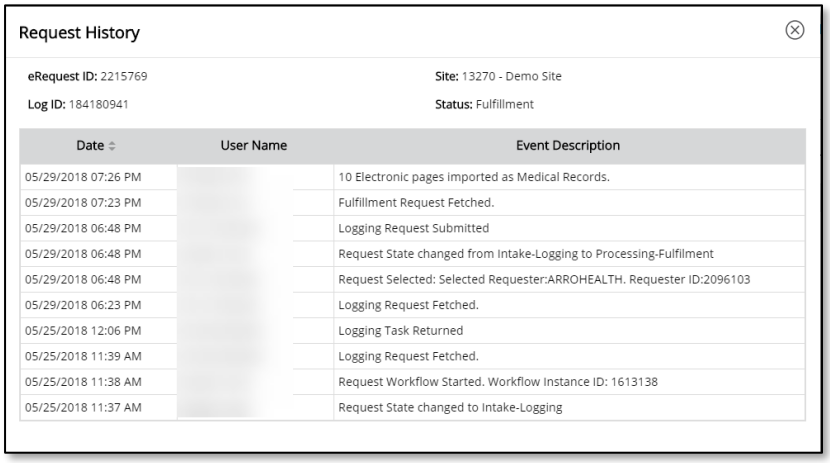
View Request Documents:

Screenshot	Steps
	Click the **Request Search** magnifying glass button or press **ALT + G** on your keyboard. ***Or*** Select the HealthSource **Menu** and then select **Request Search.**
	To view the request and data entry details, select the eRequest ID from the search results.
 **Legend**: Request Letter: Certification Letter: Correspondence: Medical Records: Invoice:	By default, the request letter appears when you open a request. Click a symbol in the upper left corner to view a document. • **Blue symbol** = indicates the document field you are viewing. • **Grey symbols** = document not part of the request • **Black symbol**=document is available

Continued on next page

© 2020, Ciox Health. All Rights Reserved

View Request History:

Screenshot	Steps
	Click the **Request Search** magnifying glass button or press **ALT + G** on your keyboard. ***Or*** Select the HealthSource **Menu** and then select **Request Search.**
	Search for the request. Select request by clicking the box next to it and choose **the book icon.**
	The **Request History** appears in a pop-up window, with events listed from most recent to oldest. **For example**: To see when the records were sent - look for EROUTE. This will provide you with the date it was sent and how it was sent – mail, electronic, SSA etc.

© 2020, Ciox Health. All Rights Reserved