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Ciox Health Client HealthSource Clarity Quick Start Guide

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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 the	ese 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.	



Creating a Username and Password for HealthSource Clarity



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" Olick "Data a" use an externa of the third result. 				
	Click Done when returned to this page Extra verification is required for your account Extra verification is required for your account use				
	Set up extra verification				
	Okta Verify Mobile App 🖉 Setup				
	Coogle Authenticator Mebile App				
	Text Message Code				
	Security Question				
	Cancel Done				
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.				
/ 	Click "Create My Account".				
o	corner and select "Sign out".				
	<u>Step</u> 4 5 7 8				



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



Password Expiring Notification and Instructions



Password	 HealthSource Active Passwords will expire every 60 days Any active account where a password is going to expire receives
Expiring	an email notification on day 14,7,5,3,2,1 and 0 The email notification will be sent from
Notifications	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

 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 Hea From: <noreply.pwd@cioxhealth.com> Date: 2019-05-22 07:44</noreply.pwd@cioxhealth.com>	alth Password Expires in 14 days
Dear ,	
Your Ciox HealthSource account is expiring in	14 days.
To avoid interruption of service, please user account name.	copy or click the visit Password Reset Site link below to begin with your
Your User Account Name:	lungemail.com
Password Reset Site: https://cioxhealth	h.okta.com/reset-password
Please contact the Ciox Health IT Servi	ce Desk for additional assistance.
Thank You, Ciox Health servicedesk@cioxhealth.com (877) 358-6939	



Password Expiring Notification and Instructions



Your	Ctor			
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).		
		Having trouble signing in? Back Send Text Message Send Email		
	3	You will receive a confirmation message that the email has been sent.		
		Email sent! An email has been sent with instructions on resetting your password If you are having trouble or can't access your email please contact your administrator at 877.358.6939. Back		



Password Expiring Notification and Instructions



Password	Step	Action
Expiring	4	Check your email inbox for the below message from
Notifications,		"Noreply.okta@CioxHealth.com" and click Reset
continuea		Password button to continue.
		CIOX Account password reset
		Contrain + Nangadara constantson>
		ciox
		CIOX Health - Okta Password Reset Requested
		H A password reset regiset was made for COX Health Windows Active
		Directory acceut. If you do not make this request pieces contact the CIOX Health yatem admittation immediately.
		Rest Passord
		This link explore in 7 doys. If you experience difficulties account, send a help request to
		me CUCHean administrator: On th CIDI Kingthe Bande Hein pages Toes cirk the Ban withhein link "
	5	The following screen will be displayed to answer the
		security question you originally set, then click reset
		password button.
		Your Name Here Help Sign out
		Forgotten Password Challenge.
		Answer your forgotten password question to retest your password. If you need essistance, call support at 877358 6939.
		What is the food you least liked as a child?
		Rest Password
	6	After successfully answering the security question, you
		will enter a new password following the password
		requirements mentioned previously, and click Reset
		Password.
		The Base Mar. Soc. Soc. St
		Reset Your CIOK Health Password Research registrations of Healt diversities, summaries laters are appointed from a summaries and the summary and the summaries and the summari
		6 panawork, A Hann Tornshoft must here alregard since you but theregod your panawork Named assessment Call support at 871258.0509
		Enter new persent
		Instances
	(After successfully resetting your password, the user
		password page will be displayed. The browser can be
		ciosed and you can now log into HealthSource using:
		nups://unity.cloxnealtn.com/clpul/#/login,



Logging into HealthSource Clarity



How to Login	Follow these steps to login to HealthSource (Clarity:
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	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.		
timento	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.		





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
Request Search	 HEALTH × SOURCE My Dashboard My Holds Request Search 	Click the Request Search magnifying glass button or press ALT + G on your keyboard. Or Select the HealthSource Menu and then select Request Search
HEALTH X SOURCE	Event Notifications 🚥 Amanda Boyle • Q 🚱 🕛	On the Request
Unique Identifier Date Range Type of Identifier Date Type: Number Date Sange Enter Identifier Number Date Sange Date Sange Date Sange Enter Identifier Number Date Sange Date Sange Date Sange Enter Identifier Number Date Sange Date Sange Date Sange Patient Information MRA: Patient Date of Birth: MRA: Date Sange Date Sange Date Sange Date Sange Date Sange MRA: Patient Date of Birth: Date Sange Date Sange Date Sa	Requester Class Search Work Next Sites Groups: Request Progress Request Characteristics Accessed by: Satus Reason: Request Reason: Status Reason: Additional Request Characteristics Request Reason: Escalation Parameters Additional Request Characteristics Request Reason: Status Reason: Additional Request Characteristics Request Reason: Status Reason: Additional Request Characteristics Requester Reason: Status Reason: Additional Request Characteristics Requester Reason: Status Reason: Requester Reason: Requester Reason: Status Required: Requester Required: Requester Name or Number Requester Class Name or Number Requester Required: Additional Request Requester Reason: Image: Required: Additional Request Requester Class Requester Class	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
Stel D Group ID Request Requ 13270 - D 3511875 STE. ROBERT Patie 13270 - D 3511977 hQELHRIm, xzr. Patie 13270 - D 3511921 ram, sam D	Total Rems displayed - 6 Facility Request Reason ret ROBERT STE 12/31/19 02/05/2019 06/28 A 02/05/2019 Ready to Log rt X2/XVITAC h 10/10/19 02/05/2019 06/28 A 02/05/2019 Ready to Log rt X2/XVITAC h 10/10/19 02/05/2019 06/28 A 02/05/2019 Ready to Log OB Intake Date Rcvd Date Rcvd Date	The Search Results table shows matching requests. You can sort the search results by clicking a column
1	2/31/19 02/05/2019 04:36 A 02/05/2019	label. Click on an
1	0/10/19 02/05/2019 06:28 A 02/05/2019	taken to the request.





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.	Instruction Sector New New Type Instruction Sine of congretation Sine of congre
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.	2 Deset Criteria Show All Search Criteria Hide Criteria
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.	Exact matches only! These new fields do NOT support partial or wild card searches. For example, searching for 123 as the Social Security Number will return no results, even if dozens of requests include that sequence in the SSN field.



Searching for a Request in HealthSource Clarity



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 	Date Range Date Type: Accessed by Date Tom: To: To: Date Range Date Type: Intake Date Prom: To: Today Yesterday Last 7 Days Month to Date Date Picker
	 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. 	Date Range Date Type: Days Until Due 4d Guide: Number of Days: Select 4f = Equal > More 4e < Less <> Range





Field		Description
Field 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 	Request Progress Milestone and Status: All tatus Reason: All All Request Progress Milestone and Status: Milestone and Status: All r Progress Milestone and Status: Progress Milestone and Status: All Fulfillment Sb Requester Setup
6	Milestone are checked. If there is a square dot, then less than all of the status options are checked. The Accessed by search field finds requests that were opened by a user	Awaiting Approval Packaging Delivery Closed Accessed by:
	or multiple users.a) To find requests that you worked on, checkmark the Me box.	6a Me All Users 6b Select User(s) 8
	 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. 	All Email Address First Name Middle Name Last Name Image: Control and the second
	What does "access" mean? When a request is opened, it is immediately considered accessed. No work tasks are required.	



Searching for a Request in HealthSource Clarity



Field		Description
7	Search Criteria And Search Results Retained	Base Media Bar of Data Ford Nort Nort Stars Media Bar of Data Bar of Data Stars Advance Stars Advance
	Any Search Criteria field choices you make are retained as long as you are logged in to HealthSource Clarity.	We dram bands
	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	Search Work Next
	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.	Request Characteristics Type and Requester Class: All Request Reason: All Request Details Requester Name/Number: Requester Name or Number Request Intake Type: All Image: All image: Request Intake Type:





View Request Documents:







View Request History:

				Steps
R		HEALTH X SOURCE My Dashboard My Holds	E	Click the Request Search magnifying glass button or press ALT + G on your keyboard. <i>Or</i> Select the HealthSource Menu and then select Request Search.
STA				Search for the request. Select request by clicking the box next to it and choose the book icon.
Request History			8	The Request History appears in a pop-up
Request History eRequest ID: 2215769		Site: 13270 - Demo Site	8	The Request History appears in a pop-up window, with events listed
Request History eRequest ID: 2215769 Log ID: 184180941		Site: 13270 - Demo Site Status: Fulfillment	8	The Request History appears in a pop-up window, with events listed from most recent to oldest.
Request History eRequest ID: 2215769 Log ID: 184180941 Date =	User Name	Site: 13270 - Demo Site Status: Fulfillment Event Description	8	The Request History appears in a pop-up window, with events listed from most recent to oldest.
Request History eRequest ID: 2215769 Log ID: 184180941 Date = 05/29/2018 07:26 PM	User Name	Site: 13270 - Demo Site Status: Fulfillment Event Description	8	The Request History appears in a pop-up window, with events listed from most recent to oldest. For example : To see when
Request History eRequest ID: 2215769 Log ID: 184180941 Date = 05/29/2018 07:25 PM 05/29/2018 07:23 PM	User Name	Site: 13270 - Demo Site Status: Fulfillment Event Description 10 Electronic pages imported as Medical Records. Fulfillment Request Fetched.	8	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
Request History eRequest ID: 2215769 Log ID: 184180941 Date = 05/29/2018 07:26 PM 05/29/2018 07:23 PM 05/29/2018 06:48 PM	User Name	Site: 13270 - Demo Site Status: Fulfillment Event Description 10 Electronic pages imported as Medical Records. Fulfillment Request Fetched. Logging Request Submitted	8	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
Request History eRequest ID: 2215769 Log ID: 184180941 Date = 05/29/2018 07:26 PM 05/29/2018 07:23 PM 05/29/2018 07:28 PM 05/29/2018 06:48 PM 05/29/2018 06:48 PM	User Name	Site: 13270 - Demo Site Status: Fulfillment Event Description 10 Electronic pages Imported as Medical Records. Fulfillment Request Fetched. Logging Request Submitted Request State changed from Intake-Logging to Processina-Fulfilment	8	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
Request History eRequest ID: 2215769 Log ID: 184180941 Date = 05/29/2018 07:26 PM 05/29/2018 07:28 PM 05/29/2018 07:28 PM 05/29/2018 06:48 PM 05/29/2018 06:48 PM 05/29/2018 06:48 PM	User Name	Site: 13270 - Demo Site Status: Fulfillment Event Description 10 Electronic pages imported as Medical Records. Fulfillment Request Fetched. Logging Request Submitted Request State changed from Intake-Logging to Processing-Fulfilment Request Selected: Selected Requester:ARROHEALTH. Requester ID:2096103	8	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
Request History eRequest ID: 2215769 Log ID: 184180941 Date ÷ 05/29/2018 07:26 PM 05/29/2018 07:23 PM 05/29/2018 07:23 PM 05/29/2018 06:48 PM 05/29/2018 06:48 PM 05/29/2018 06:32 PM	User Name	Site: 13270 - Demo Site Status: Fulfillment Event Description 10 Electronic pages imported as Medical Records. Fulfillment Request Fetched. Logging Request Submitted Request State changed from Intake-Logging to Processing-Fulfilment Request Selected: Selected Requester:ARROHEALTH. Request Fibred. Logging Request Fetched.	8	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
Date D5/29/2018 07:26 PM 05/29/2018 07:26 PM 05/29/2018 07:23 PM 05/29/2018 06:48 PM 05/29/2018 06:49 PM <td>User Name</td> <td>Site: 13270 - Demo Site Status: Fulfillment 10 Electronic pages imported as Medical Records. Fulfillment Request Fetched. Logging Request Submitted Request State changed from Intake-Logging to Processing-Fulfilment Request Selected: Selected Requester:ARROHEALTH. Request Fiberched. Logging Request Fetched. Logging Ray Effected: Selected Requester:ARROHEALTH. Request Fiberched.</td> <td>8</td> <td>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</td>	User Name	Site: 13270 - Demo Site Status: Fulfillment 10 Electronic pages imported as Medical Records. Fulfillment Request Fetched. Logging Request Submitted Request State changed from Intake-Logging to Processing-Fulfilment Request Selected: Selected Requester:ARROHEALTH. Request Fiberched. Logging Request Fetched. Logging Ray Effected: Selected Requester:ARROHEALTH. Request Fiberched.	8	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
Request History eRequest ID: 2215769 Log ID: 184180941 Date ÷ 05/29/2018 07:23 PM 05/29/2018 07:23 PM 05/29/2018 06:48 PM 05/29/2018 12:06 PM 05/29/2018 12:06 PM 05/25/2018 12:06 PM	User Name	Site: 13270 - Demo Site Status: Fulfillment I0 Electronic pages imported as Medical Records. Fulfillment Request Fetched. Logging Request Submitted Request State changed from Intake-Logging to Processing-Fulfilment Request Selected: Selected Requester:ARROHEALTH. Request rID:2096103 Logging Task Returned Longing Task Returned	8	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.
Request History eRequest ID: 2215769 Log ID: 184180941 Date = 05/29/2018 07:23 PM 05/29/2018 07:23 PM 05/29/2018 06:48 PM 05/29/2018 06:48 PM 05/29/2018 06:48 PM 05/29/2018 06:48 PM 05/29/2018 10:54 PM 05/29/2018 11:38 AM	User Name	Site: 13270 - Demo Site Status: Fulfillment I0 Electronic pages imported as Medical Records. Fulfillment Request Fetched. Logging Request Submitted Request State changed from Intake-Logging to Processing-Fulfilment Request Selected: Selected Requester:ARROHEALTH. Request rID:2096103 Logging Request Fetched. Logging Task Returned Logging Request Fetched. Request Fetched. Request Fetched.	8	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.

