HealthSource Tray App Tip Sheet

Overview

HealthSource has a Tray App as part of its installation that allows functionality like downloading documents, fulfilling requests, etc. In some cases, a user may only need limited access to HealthSource. These users will not be responsible for fulfilling a request but may still need access to search requests for information.

Below you will find the actions that are available when the HealthSource Tray App is *not* installed. Please contact your Ciox representative for instruction should you need a Tray App installation.

When the HealthSource TrayApp is NOT Installed

I CAN	I CANNOT
- Search for requests - Add New request – log it and submit and close. - Upload (drag and drop) requests into HS - Request Search; View request letters, records and invoices (depending on access level) post fulfillment - Run reports Note: *I do get an error message that I need to start my plug in, but I can x out of it and still do the above.*	- Download anything regardless of status - Process requests in fulfillment - Print anything in to HealthSource - Scan into HealthSource