

HealthSource Clarity v1.6.2



ciOX
HEALTH **SOURCE**

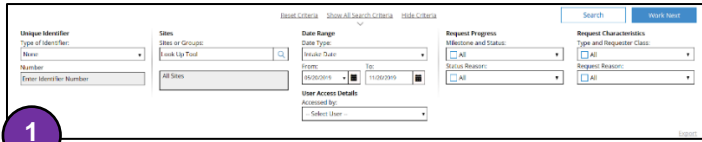
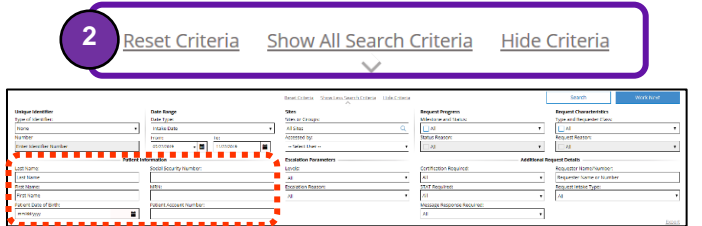

TABLE OF CONTENTS

- Revised Look and Function of the Request Search Tool 3
- Custom Work Lists and the Work Next Command 7
- My Work Queue 8
- Messaging 9
- New Message Response Required 12
- Retain Requester on Switch to Pull List 13
- View Intake Type on Request Screen..... 14
- Automatic Identification of High-Volume Requesters..... 15
- Changes to Post-Fulfillment Request Statuses..... 16

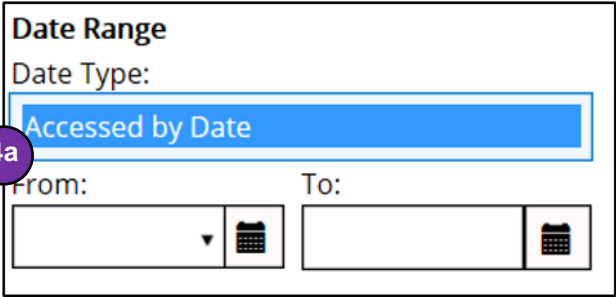


Revised Look and Function of the Request Search Tool

The latest changes to the **Request Search** tool make it easier to find requests specific to your search criteria. The revised Request Search screen has a simplified layout with less frequently used search fields hidden by default. You are able to hide the search criteria to create more viewing space and export your results to Excel!

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

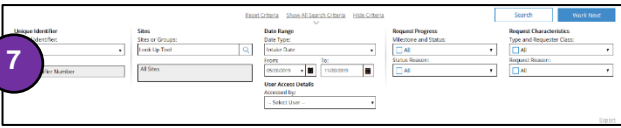
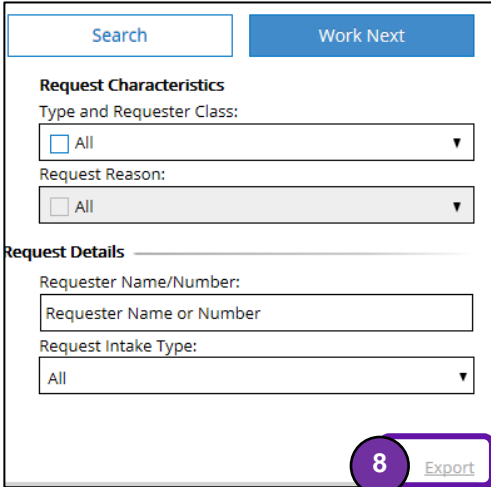


Field	Description
<p>4</p>	<p>Date Type Changes</p> <p>a) The new Accessed by Date finds requests that were opened in a specific date range.</p> 
<p>Pre-Defined Options</p> <p>b) IF you choose any of these Date Type options:</p> <ul style="list-style-type: none"> • Accessed by Date • Due Date • Facility Received Date • Intake Date <p>c) THEN you can choose new pre-defined options in the From field.</p> <p>All start and stop times are based on Eastern time. They are NOT adjusted for your local time zone.</p>	<p>Date Range</p> <p>Date Type:</p> <p>Intake Date 4b</p> <p>From: To:</p> <p>Today Yesterday Last 7 Days Month to Date Date Picker</p> <p>4c</p>
<p>The new Days Until Due locates requests based on the time remaining before they are due to be delivered:</p> <p>d) Select Days Until Due in the Date Type field.</p> <p>e) Choose the appropriate Guide option.</p> <p>f) Enter the Number of Days or From/To values.</p>	<p>Date Range</p> <p>Date Type:</p> <p>Days Until Due 4d</p> <p>Guide: Number of Days: 4f</p> <p>Select</p> <p>= Equal > More < Less <> Range</p> <p>4e</p>



Field	Description																																																								
5	<p>a) Now, you can make multiple choices in Milestone, Status and Reason.</p> <p>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.</p> <p>Note: A checkmark in the All box means all search options under it are checked. If there is a square dot, then less than all of the search options are checked.</p>	<p>Request Progress Milestone and Status: <input checked="" type="checkbox"/> All</p> <p>Status Reason: <input checked="" type="checkbox"/> All</p> <p>Request Progress Milestone and Status: <input checked="" type="checkbox"/> All</p> <ul style="list-style-type: none"> > <input checked="" type="checkbox"/> Logging > <input checked="" type="checkbox"/> Fulfillment > <input type="checkbox"/> Requester Setup > <input type="checkbox"/> Awaiting Approval > <input type="checkbox"/> Packaging > <input type="checkbox"/> Delivery > <input type="checkbox"/> Closed 																																																							
6	<p>The new Accessed by search field finds requests that were opened by a user or multiple users.</p> <p>a) To find requests that you worked on, checkmark the Me box.</p> <p>b) To find requests that other users accessed, click Look Up Users magnifying glass.</p> <p>c) The Select User(s) window appears. Select users (only users you have access to will appear). After selection, click Save Selected Users.</p> <p>What does "access" mean? When a request is opened, it is immediately considered accessed. No work tasks are required.</p>	<p>Accessed by: <input checked="" type="checkbox"/> Me All Users <input type="text"/> <input type="button" value="Look Up"/></p> <p>Select User(s)</p> <table border="1"> <thead> <tr> <th>All</th> <th>Email Address</th> <th>First Name</th> <th>Middle Name</th> <th>Last Name</th> </tr> </thead> <tbody> <tr><td><input checked="" type="checkbox"/></td><td>Aaron.Epstein@cioxhealth.com</td><td>Aaron</td><td></td><td>Epstein</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>abhiny.baki@cioxhealth.com</td><td>Abhiny</td><td></td><td>Baki</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>account.manager@cioxhealth.com</td><td>Account</td><td></td><td>Manager</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>accountmanager.automation@cioxhealth.com</td><td>accountmanager</td><td></td><td>automation</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>accountmanager.manual@cioxhealth.com</td><td>accountmanager</td><td></td><td>manual</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>adriane.munoz@cioxhealth.com</td><td>Adriane</td><td></td><td>Munoz</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>ajth@gmail.com</td><td>ajth</td><td></td><td>kumar</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>albert.arokayasoundas@cioxhealth.com</td><td>albert</td><td></td><td>arokayasoundas</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>alberta.jenkins@healthport.com</td><td>Alberta</td><td>Alexandria</td><td>jenkins</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>alexander.shastra@cioxhealth.com</td><td>alexander</td><td></td><td>shastra</td></tr> </tbody> </table> <p>1 - 100 of 1191 Items</p> <p><input type="button" value="Clear"/> <input type="button" value="Save Selected Users"/></p>	All	Email Address	First Name	Middle Name	Last Name	<input checked="" type="checkbox"/>	Aaron.Epstein@cioxhealth.com	Aaron		Epstein	<input checked="" type="checkbox"/>	abhiny.baki@cioxhealth.com	Abhiny		Baki	<input checked="" type="checkbox"/>	account.manager@cioxhealth.com	Account		Manager	<input checked="" type="checkbox"/>	accountmanager.automation@cioxhealth.com	accountmanager		automation	<input checked="" type="checkbox"/>	accountmanager.manual@cioxhealth.com	accountmanager		manual	<input checked="" type="checkbox"/>	adriane.munoz@cioxhealth.com	Adriane		Munoz	<input checked="" type="checkbox"/>	ajth@gmail.com	ajth		kumar	<input checked="" type="checkbox"/>	albert.arokayasoundas@cioxhealth.com	albert		arokayasoundas	<input checked="" type="checkbox"/>	alberta.jenkins@healthport.com	Alberta	Alexandria	jenkins	<input checked="" type="checkbox"/>	alexander.shastra@cioxhealth.com	alexander		shastra
All	Email Address	First Name	Middle Name	Last Name																																																					
<input checked="" type="checkbox"/>	Aaron.Epstein@cioxhealth.com	Aaron		Epstein																																																					
<input checked="" type="checkbox"/>	abhiny.baki@cioxhealth.com	Abhiny		Baki																																																					
<input checked="" type="checkbox"/>	account.manager@cioxhealth.com	Account		Manager																																																					
<input checked="" type="checkbox"/>	accountmanager.automation@cioxhealth.com	accountmanager		automation																																																					
<input checked="" type="checkbox"/>	accountmanager.manual@cioxhealth.com	accountmanager		manual																																																					
<input checked="" type="checkbox"/>	adriane.munoz@cioxhealth.com	Adriane		Munoz																																																					
<input checked="" type="checkbox"/>	ajth@gmail.com	ajth		kumar																																																					
<input checked="" type="checkbox"/>	albert.arokayasoundas@cioxhealth.com	albert		arokayasoundas																																																					
<input checked="" type="checkbox"/>	alberta.jenkins@healthport.com	Alberta	Alexandria	jenkins																																																					
<input checked="" type="checkbox"/>	alexander.shastra@cioxhealth.com	alexander		shastra																																																					



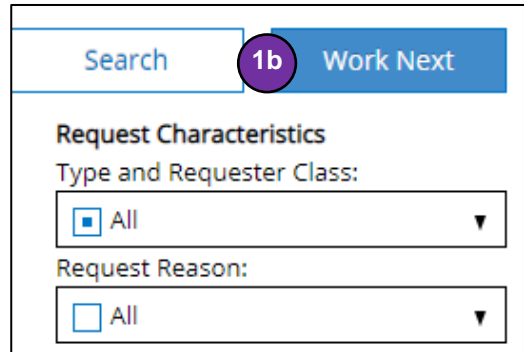
Field	Description	
<p>7</p> <p>Search Criteria And Search Results Retained</p> <p>Any Search Criteria field choices you make are retained as long as you are logged in to HealthSource Clarity.</p> <p>In the same way, your Search Results are always displayed until you either run a new search or log out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



Custom Work Lists and the Work Next Command

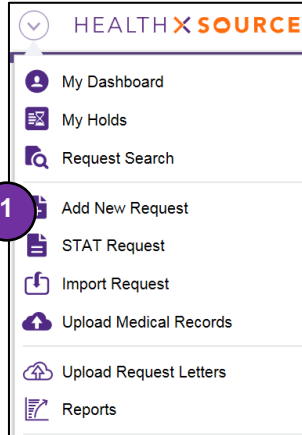
By taking advantage of the new **Request Search** options and the **Work Next** command, you can find your exact specified requests. You no longer need to rely on HealthSource Clarity default priority options. Also, Healthsource Clarity won't open a request that someone else is working on.

Field	Description
1	<p>Create a Customized Work List</p> <ol style="list-style-type: none"> Run a search for requests. Check with your supervisor for guidance on the kinds of requests that you should prioritize. After the Search Results appear, click the new Work Next button. HealthSource Clarity opens the first request in your Search Results that is NOT being worked on by another user. HealthSource Clarity repeats the process if you use one of the “and Next” commands to close the request. For example: Submit and Next, Save and Next, etc. If you use an “and Close” or “and Save” command, you’ll return to the Search Results. <p>If you don't run a search, clicking Work Next will load the “next available” request, based on HealthSource Clarity default priorities:</p> <ul style="list-style-type: none"> STAT Days until Due Oldest (first in — first out)



My Work Queue

My Work Queue has been removed from HealthSource Clarity.

Field	Description
1	<p>Because you can now create your own custom work lists with Request Search, My Work Queue has been removed from HealthSource Clarity.</p>  <ul style="list-style-type: none">HEALTH X SOURCEMy DashboardMy HoldsRequest Search1 Add New RequestSTAT RequestImport RequestUpload Medical RecordsUpload Request LettersReports



Messaging

The ROI Processing Center occasionally needs to contact a site about a request. There are many reasons for this kind of message, but typically the Processing Center has found a potential problem with the selected requester or the Medical Records.

Before now, there was no way to display these messages in HealthSource Clarity. Instead, the messages appeared in the RepOnline application. Now, you can see and respond to Messages in HealthSource Clarity.

When does a Message appear?

Messages are site-specific. They are NOT user-specific. HealthSource Clarity checks for new/open messages every 60 seconds and automatically updates the Events Notification link.

For example, John Doe at Site 13270 handled Request 98765432, but if the ROI Processing Center sends a Message about it, ANYONE with access to Site 13270 can respond.

If there is an open Message concerning a request at a site to which you have access, you will see an **Event Notification** at the top of the HealthSource Clarity screen. It is important to respond to these messages as soon as possible. Check with your supervisor/manager for Messages protocol at your site.

When does a Message notification disappear?

IF your site has responded to all the Messages AND there are no Document Transmission notifications; THEN the Event Notification link disappears.



How Do I View and Respond to a Message?

Step	Action
1	Click the Event Notifications link.
2	The Event Notifications window appears. The message list is sorted by Oldest Message to Newest Message. Click View Request .
3	The Messages window appears. a) Read the details b) Investigate the question
4	a) Type a response in the Response field. You are limited to 400 characters. The Send button will activate. b) Click Send .

HEALTHSOURCE

Event Notifications

Logging Total: 95596

Fulfillment

Filter by Location: All Sites

Messages

eReque...	Received	Description	Next Steps
10062190	11/20/2019 01:42 P...	Reason: Other Comment: PLEASE PROVIDE REQUESTOR...	2 View Request
10062329	11/20/2019 01:43 P...	Reason: MISSING/ILLEGIBLE PATIENT INFO Comment: Patient in...	View Request
10064247	11/20/2019 01:45 P...	Reason: WHAT IS INVOICE TYPE Comment: PATIENT NAME NOT...	View Request
10273910	11/20/2019 02:08 P...	Reason: CUST NUM DOESNT MATCH ADDRESS Comment: Pleas...	View Request
10063524	11/20/2019 02:30 P...	Reason: MULTIPLE PATIENT NAMES Comment: PATIENT NAME...	View Request
10062360	11/20/2019 02:34 P...	Reason: CUST NUM DOESNT MATCH ADDRESS Comment: Pleas...	View Request

Messages

eRequest ID: 10062190 Received: 11/20/2019 01:42 PM From: Gopinath Ku...

Subject: Other

Details: PLEASE PROVIDE REQUESTORS ADDRESS. ALSO VERIFY PT NAME AND DOB. PLEASE CALL 800-367-1500 X 1865 OR EMAIL REPMESSAGES@CIOXHEALTH.COM

Response:

Maximum Characters: 400

Send

Messages

eRequest ID: 10062190 Received: 11/20/2019 01:42 PM From: Gopinath Ku...

Subject: Other

Details: PLEASE PROVIDE REQUESTORS ADDRESS. ALSO VERIFY PT NAME AND DOB. PLEASE CALL 800-367-1500 X 1865 OR EMAIL REPMESSAGES@CIOXHEALTH.COM

Response: The correct address is 123 Main Street. The patient name is Jane Doe. Patient birthday is 01/01/1970.

Maximum Characters: 400

Send



Step	Action																									
5	<p>The message disappears from the Events Notification list.</p>	<div data-bbox="771 325 1526 567"> <p>Messages</p> <table border="1"> <thead> <tr> <th>eReque...</th> <th>Received</th> <th>Description</th> <th>Next Steps</th> </tr> </thead> <tbody> <tr> <td>10062329</td> <td>11/20/2019 01:43 P...</td> <td>Reason: MISSING/ILLEGIBLE PATIENT INFO Comment: Patient in...</td> <td>View Request</td> </tr> <tr> <td>10064247</td> <td>11/20/2019 01:45 P...</td> <td>Reason: WHAT IS INVOICE TYPE Comment: PATIENT NAME NOT...</td> <td>View Request</td> </tr> <tr> <td>10273910</td> <td>11/20/2019 02:08 P...</td> <td>Reason: CUST NUM DOESNT MATCH ADDRESS Comment: Pleas...</td> <td>View Request</td> </tr> <tr> <td>10063524</td> <td>11/20/2019 02:30 P...</td> <td>Reason: MULTIPLE PATIENT NAMES Comment: PATIENT NAME...</td> <td>View Request</td> </tr> <tr> <td>10063360</td> <td>11/20/2019 02:34 P...</td> <td>Reason: CUST NUM DOESNT MATCH ADDRESS Comment: Pleas...</td> <td>View Request</td> </tr> </tbody> </table> </div>	eReque...	Received	Description	Next Steps	10062329	11/20/2019 01:43 P...	Reason: MISSING/ILLEGIBLE PATIENT INFO Comment: Patient in...	View Request	10064247	11/20/2019 01:45 P...	Reason: WHAT IS INVOICE TYPE Comment: PATIENT NAME NOT...	View Request	10273910	11/20/2019 02:08 P...	Reason: CUST NUM DOESNT MATCH ADDRESS Comment: Pleas...	View Request	10063524	11/20/2019 02:30 P...	Reason: MULTIPLE PATIENT NAMES Comment: PATIENT NAME...	View Request	10063360	11/20/2019 02:34 P...	Reason: CUST NUM DOESNT MATCH ADDRESS Comment: Pleas...	View Request
eReque...	Received	Description	Next Steps																							
10062329	11/20/2019 01:43 P...	Reason: MISSING/ILLEGIBLE PATIENT INFO Comment: Patient in...	View Request																							
10064247	11/20/2019 01:45 P...	Reason: WHAT IS INVOICE TYPE Comment: PATIENT NAME NOT...	View Request																							
10273910	11/20/2019 02:08 P...	Reason: CUST NUM DOESNT MATCH ADDRESS Comment: Pleas...	View Request																							
10063524	11/20/2019 02:30 P...	Reason: MULTIPLE PATIENT NAMES Comment: PATIENT NAME...	View Request																							
10063360	11/20/2019 02:34 P...	Reason: CUST NUM DOESNT MATCH ADDRESS Comment: Pleas...	View Request																							
6	<p>The message shows in the Request History. At this point, the message cannot be edited.</p> <p>If you forgot to add information, you must email the missing information to: repmessages@cioxhealth.com.</p>	<div data-bbox="771 604 1518 735"> <p>Request History</p> <table border="1"> <thead> <tr> <th>Date</th> <th>User Name</th> <th>Event Description</th> </tr> </thead> <tbody> <tr> <td>11/22/2019 04:32 PM</td> <td>John Smith</td> <td>Subject: Other Response: The correct address is 123 Main Street. The patient name is Jane Doe. Patient birthday is 01/01/1970.</td> </tr> </tbody> </table> </div>	Date	User Name	Event Description	11/22/2019 04:32 PM	John Smith	Subject: Other Response: The correct address is 123 Main Street. The patient name is Jane Doe. Patient birthday is 01/01/1970.																		
Date	User Name	Event Description																								
11/22/2019 04:32 PM	John Smith	Subject: Other Response: The correct address is 123 Main Street. The patient name is Jane Doe. Patient birthday is 01/01/1970.																								



New Message Response Required

Field	Description
<p>1</p> <p>a) Under Additional Request Details in the Search Criteria, you can search for requests that require a message response (yes) or do not require a message response (no).</p> <p>b) The Message Response Required field is located under the Additional Request Details section, which is hidden by default. You must Show All Search Criteria to see it.</p> <p>IMPORTANT: If a message is not answered within 30 days, the request will be canceled.</p>	



Retain Requester on Switch to Pull List

Field	Description
<p>1</p> <p>IF you are working on the following Requests Types:</p> <ul style="list-style-type: none"> • Standard • BOC • Continuity of Care • Patient • DDS <p>AND the requester fields are already filled out;</p> <p>BUT you change the Request Type to Pull List because the Request Letter lists multiple patients;</p> <p>THEN the requester information is RETAINED and not wiped out.</p> <p>The same rule applies in reverse when changing from Pull List to Standard. Any saved information is NOT wiped out. But the same rule does NOT apply to the rest of the Requests Types, only Standard.</p>	<p>The screenshot shows the 'Request Information' form. At the top, there is a 'Request Type:' section with radio buttons for Standard, BOC, Continuity of Care, Patient, DDS, and Pull List. A purple circle with the number '1' highlights this section. Below this, there are fields for Zip, Address, and Name. Further down, there are fields for Country (UNITED STATES), Requester Name (DEWITT LAW FIRM), Address (235 W SEALY ST), City (ALVIN), State (TX), Zip (77511-2340), Major Class (Attorney), Requester Type (Attorney), Requester # (1358942), Phone (281-331-5288), Fax (281-331-9346), Request Letter Date (05/22/2019), Facility Received Date (05/22/2019), Intake Date (05/22/2019), and Send Notification to Requester (a dropdown menu set to '- Select Notification to Requester -').</p>



View Intake Type on Request Screen

You can now view basic information about how a request was entered into HealthSource Clarity.

Field	Description	
<p>1</p> <p>Two options for Intake Type:</p> <p>a) Electronic</p> <ul style="list-style-type: none"> • AudaPro Integration • Electronic • Ciox PAYD Integration • Ciox PAYI Integration <p>b) Manual</p> <ul style="list-style-type: none"> • Add New Request • Email • Fax and Split • Patient Portal • Pull List • Upload Request Letter 	<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>*Site Location: 00197 - Arizona Medical Clinic Intake: Electronic Request Status: Ready to Log</p> <p>eRequest ID: 2520356</p> <p>1a</p> <p>Request Information</p> <p>Request Type:</p> <p><input checked="" type="radio"/> Standard <input type="radio"/> BOC <input type="radio"/> Continuity of Care <input type="radio"/> Patient <input type="radio"/> DDS <input type="radio"/> Pull List</p> </div> <div style="border: 1px solid black; padding: 5px;"> <p>*Site Location: 00197 - Arizona Medical Clinic Intake: Manual Request Status: Ready to Log</p> <p>eRequest ID: 2520543</p> <p>1b</p> <p>Request Information</p> <p>Request Type:</p> <p><input checked="" type="radio"/> Standard <input type="radio"/> BOC <input type="radio"/> Continuity of Care <input type="radio"/> Patient <input type="radio"/> DDS <input type="radio"/> Pull List</p> </div>	



Automatic Identification of High-Volume Requesters

HealthSource Clarity can now automatically identify and select two high-volume requesters if the Request Letter contains sufficient information. If the matching process finds the required information shown in the table below:

- 1) The requester will be automatically selected.
 - Change Healthcare, Requester # 1607658.
 - EquiClaim, Requester # 1650396.
- 2) The **Find Requester** fields and commands will be unavailable.
- 3) The **Approved Requester Name and Address** message will be displayed.

Keyword	Address Matching
Change Healthcare	P.O. Box 14415 Lexington, KY 40512
EquiClaim	1849 W. Drake Drive, Suite 101 Tempe, AZ 85283



Changes to Post-Fulfillment Request Statuses

Four Request Status values that were used in earlier versions of HealthSource Clarity will no longer be available after the v1.6.2 release.

Milestone	Old Status	Status after v1.6.2
Packaging	Packaging Exception	Post Fulfillment Exceptions
Delivery	Delivery Failure	Delivered (Back-end team reviews and sends)
Delivery	Delivered w/Acknowledged Exception	Delivered
Delivery	Delivered & Acknowledged	Delivered
Packaging	Back Office	

