Sending Requests to HealthSource

Overview

Introduction

There are four ways to get requests into Clarity. The following three pages will describe each option in detail:

1. Fax
2. Email
3. Upload
4. Scan

Regardless of which method is used, if multiple requests are sent at the same time, ONLY send requests in batches of 10-15 requests per site ID **AND** use the special request separator page. This expedites the Split process and ensures the requests are logged and pushed through the Intake queue as quickly as possible.

- If a single request asks for either multiple patients or has different record types (billing, radiology films), you must make a copy and clearly indicate with a circle what each request covers. This is vital for the Loggers as each request must be its own to be properly logged.

- If multiple patients, make a copy for each patient on the request and circle the patient accordingly on each request copy (this process is not for Pull Lists).

- If the single request covers different record types (medical and billing), make a copy and indicate on the first it is for medical records and on the second it is for billing. This way the Loggers know to log each for its intended purpose.

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The **first** page of **<u>each</u>** request **MUST** be date stamped or the HealthSource Page Separator (see appendix) used prior to sending to HealthSource This will be a visual indicator to the Logger who is splitting the request that it is the start of a new request package. It will also allow the Logger to identify and log the received date for each Split request.

For those requests being forwarded or sent electronically to HealthSource, the electronic entry date will be used as the received date.

Example separator page:

CIOX HEALTHSOURCE SEPARATOR PAGE

CIOX HEALTHSOURCE SEPARATOR PAGE

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CIOX HEALTHSOURCE SEPARATOR PAGE

CIOX HEALTHSOURCE SEPARATOR PAGE

CIOX HEALTHSOURCE SEPARATOR PAGE

Fax Requests into Clarity

Fax Overview	**If** the site has been issued a unique fax number, requests can be faxed into the number issued to add requests into HealthSource. The Site ID is associated with the unique fax number and only requests from that site should utilize that fax number. The HealthSource system will then utilize the Automated Data Extraction (ADE) technology to extract the needed information to log the request.
Fax Instructions	You can fax multiple Request Letters at the same, as long as: • They all come from the same Site. o The Site ID is associated with the fax number that receives the transmission. HealthSource applies the site ID to each request. **You can also fax Request Letters one at a time.
Faxing Multiple Requests at a Time	1. Make sure each Request Letter came from the same site. 2. Load the fax machine. Pay attention to the maximum number of pages that can be loaded at one time. 3. Send the Request Letters to the site-specific fax number.
Faxing One Request at a Time	1. Make sure there are no blank pages in the Request Letter. When the HealthSource system sees a blank page, it treats the following page of the request as the start of a new Request Letter. 2. Send the Request Letter to the site-specific fax number.

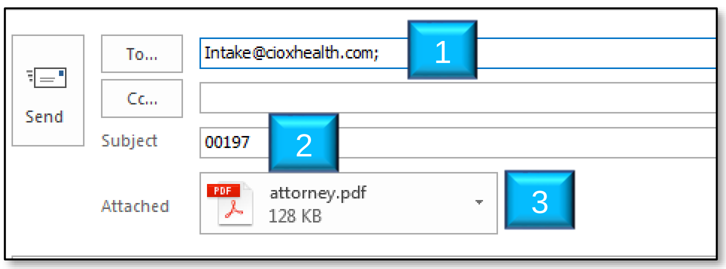
Create a New Request by Email

Create Request by Email

You can create a new request in HealthSource by attaching the Request letter (in PDF format) to an email. HealthSource creates an eRequest ID by sending the Request Letter through Automated Data Extraction (ADE). The following must be completed exactly as listed in order for the process to work appropriately.

The below fields indicate what must be completed for the email address, subject line and attachment format.

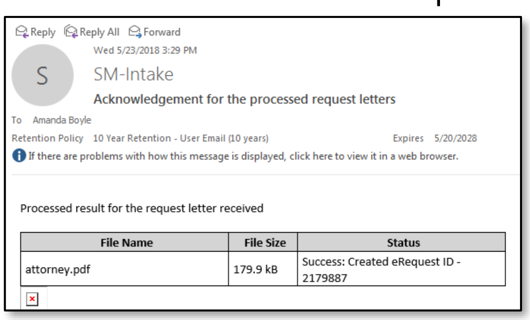
	Email Field	Entry
1	“To” Email Address	Intake@CioxHealth.com
2	Subject Line	Site Number (5 digits)
3	Attachment	PDF Only. No other attachment types accepted.



Note: An eRequest ID will be created for each PDF attachment. This process is best used when you have already received a PDF request and just need to forward it to HealthSource (ex: Faxes). Do not create PDFs to be sent to HealthSource. Utilize the procedure on the next page instead.

Notification Email When Request Has Been Created

You will be notified by email when the request has been created. This email will include the eRequest ID. See the image below:



If you receive an email with a PDF request attachment, it can be forwarded to intake@cioxhealth.com. **Remember to edit the subject line to be ONLY the site ID number**.

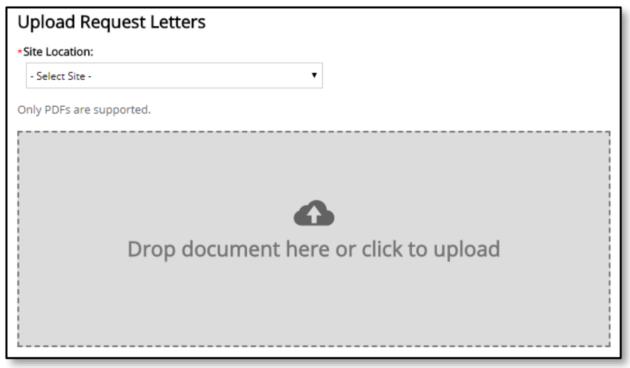
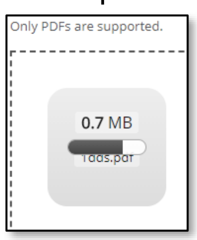
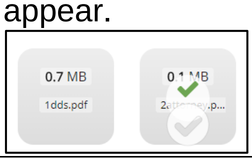
Upload Request Letters

Overview

If you have request letters in PDF format, you are able to directly upload them into HealthSource.

Procedure

Follow these steps to upload request letters into HealthSource:

Step	Action
1	From the HealthSource **Menu**, click **Upload Request Letters**. The Upload Request Letters screen will appear.
2	Select the **Site Location** from the drop down.
3	Drag and drop the PDF's into the screen or select the screen to click and upload. 
4	If "Click to Upload" was selected, you must choose the PDF files from the location on your computer.
5	The request will be uploaded. 
6	When the upload is complete, a green check mark will appear. 
7	Exit the screen.

Note: There is <u>**NO**</u> final **Submit** or **Confirm** command. If you accidentally upload an incorrect PDF file, you must find, open, and **Cancel** the request that was created from it.

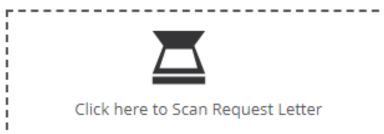
Scanning Request Letters in Bulk

Overview

The following steps describe the procedure to scan request letters into HealthSource. It is preferred that you scan your request batch to create a PDF package (utilizing PDF creation software) and then utilize the Upload Request Letters feature instead. The process described below does not work with our OCR/NLP process therefore each request needs to be manually split by a Logger.

When you scan in multiple requests letters as a single eRequest ID, the request will need to be split into individual eRequest ID's for each of the requests within it. The Split process essentially splits up each request package into individual eRequest ID's.

Procedure

Step	Action
1	From the HealthSource **Menu**, click **Add New Request**. The Logging screen will appear.
2	Select the **site** from the drop down (This process can only be done for one site ID at a time).
3	On the left-hand pane, select the **scan** icon. 
4	Scan all of the request letters including the page separator/divider (see appendix).
5	Click **Save and Close** to return to the Work Queue.
6	The request will now be available to the Central Intake team to perform the Split process.