

# Navigation

## Facets 5.0 Participant Guide

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## Navigation

Facets is TriZetto's solution to assist payer organizations in staying ahead of trends in the employer benefits market. Facets encompasses sophisticated technology that automates work processes, reduces costs, and simplifies the process of navigating through a health care delivery system.

The Facets system provides a comprehensive solution to support multiple lines of business and complex Product offerings. As a modular system, Facets allows health plans to use Facets core modules, and optionally select additional modules that will meet their business needs. Core Facets modules include:

- Accounting
- Application Support
- Customer Service
- Dental and Medical Plans
- Dental and Medical Provider Agreements
- Pricing Profile
- Provider
- Subscriber/Member
- Billing
- Capitation/Risk Allocation
- Claims Processing
- Commissions
- Criteria Maintenance
- Utilization Management

In addition to the core modules, TriZetto's Consumer Directed Healthcare and Value-Based Benefits Solutions are benefit design and incentive management software solutions that give healthcare payers the ability to customize benefits and other incentives to meet the needs of individual members.

Facets Workflow is a Java-based application that automatically prioritizes and routes claims and customer service work items based on rules that reflect an organization's business, staffing, and training needs. Through integration with Facets, Workflow enables real-time delivery of claims and customer service items, reducing bottlenecks, automating work and reducing costs while improving speed and accuracy.

Facets is also fully compliant with HIPAA (Health Insurance Portability and Accountability Act) regulations. The HIPAA Suite offers tools (HIPAA Gateway™ and HIPAA Privacy) that allow health plans to receive, store and send transactions that comply with HIPAA mandated standards, and administer individual privacy rights with respect to stored data.

## Signing-On

The initial steps to sign into Facets may vary dependent on the health plan, but in most cases a user needs to select (double-click) an icon from either their desktop or a display window, e.g. Citrix™.

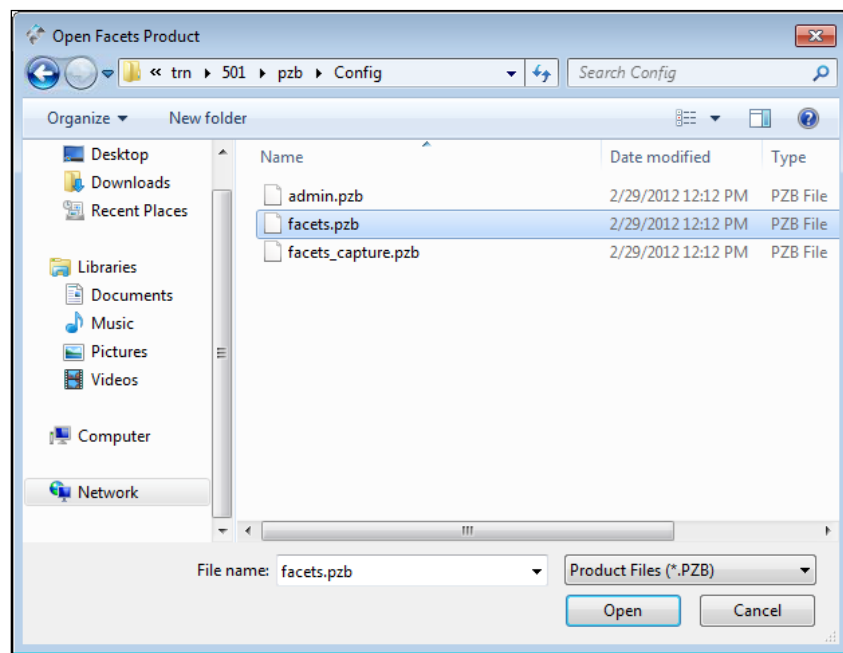
### Signing On

Step	Signing On Procedures
1	Select the Facets Icon.  A Facets 'logo' screen displays, and it will include a Title bar, Menu bar and Status bar; the Status bar is located at the bottom of the screen.



Use the **File** command on the menu bar to access Facets database files. You can identify these files by the pzb file extensions. Dependent on a user's logon security, once a database file is opened a user may have the ability to create, delete, edit, and/or view information in Facets.

Step	Signing On Procedures (continued)
2	Select <b>Open</b> from the <b>File</b> menu ( <b>Alt+F+O</b> ) to bring-up the <b>Open Facets Product</b> dialog box. The exact pzb file to select and open is unique to each individual health plan.
3	After selecting a database file, select <b>Enter</b> or select the <b>Open</b> button.



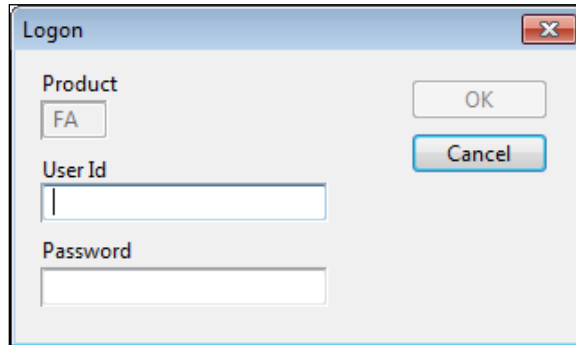
Step	Signing On Procedures (continued)
4	After selecting a pzb file and the <b>Open</b> button from the <b>Open Facets Product</b> dialog box, Facets displays a <b>Logon</b> dialog box. The Product textout field will indicate either FA

### **Keep in Mind...**

The **Open Facets Product** dialog box provides the means to access either the FA (Facets Applications) or SA (System Administration) sides of Facets.

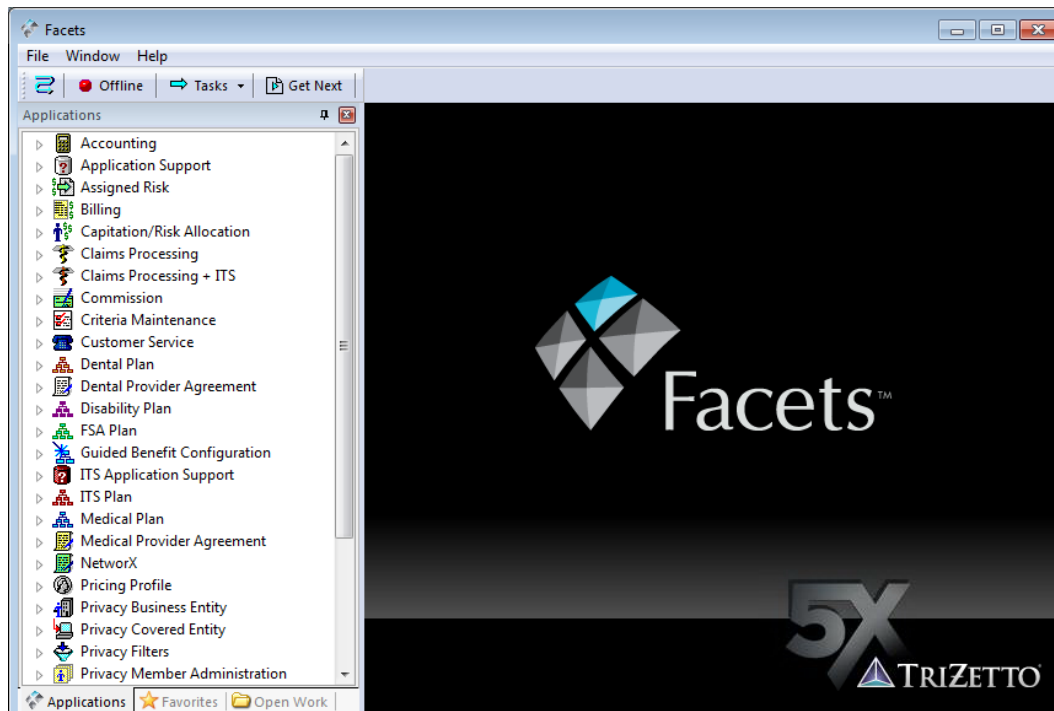
The SA side of Facets is limited to those users who are responsible for Security, System Parameters, Letter Server tasks, and Global System maintenance.

A user may be able to select a listed database (pzb file), but after entering their **User ID** and **Password** in the **Logon** dialog box, they may be denied access to the file. Access to a database file is a security function, maintained on the SA side of Facets.



Step	Signing On Procedures (continued)
5	Enter a valid Facets User ID in the <b>User ID</b> field.
6	Enter a valid password in the <b>Password</b> field. For security, the password characters will be displayed as asterisks.
7	Select <b>Enter</b> or select the <b>OK</b> button.

**Note:** Dependent on the security attached to a user's Logon ID, only those Application Groups for which a user has access to will display in the **Navigation** area.



There are various ways to sign (log) off Facets:

- Select **Exit** from the **File** menu (**Alt+F, X**), which may be done by using the mouse or the keyboard
- Select the close window icon (**X**) from the Navigation Window's Title bar
- Select **Close All Applications** from the **Windows** menu (**Alt+W, E**)
- Select the hot/quick key combination of **Alt+F4**

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**Note:** **Ctrl+F4** is a quick key combination that closes an application.

**Note:** If a file in an application is currently opened and changes were made to the file, but the file was not saved, Facets displays a pop-up box similar to the one shown below, prompting the user to save the file.

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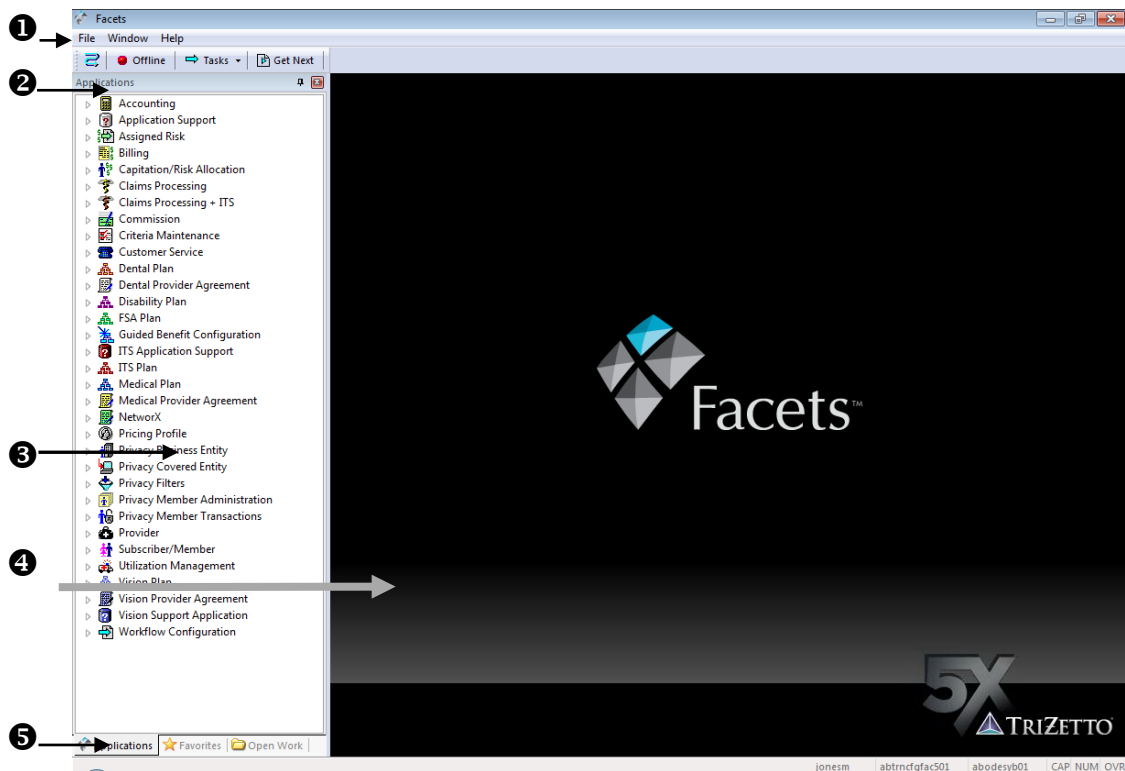
The **File...Sign-on** menu option, offers the ability to sign-on: with a different User ID, sign-on into a different database or sign onto the System Administration (SA) side of Facets without coming out of the Facets application. This command will still request verification to log off from the current database.

## Facets Navigation Window

The Navigation Window that is displayed after successfully signing on to Facets may be thought of as a “main menu screen” for the system. It is from this window that you may select an application to open. After opened you may view information in the database, as well as add, delete, or edit information.

The Navigation window panel consists of five areas:

- ❶ Title Bar
- ❷ Menu Bar
- ❸ Navigation Area
- ❹ Workspace
- ❺ Status Bar





## ① Title Bar

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Identifies the current selected application. If the application is associated with multiple files, the Title Bar will also indicate the name or description of an open file.

## ② Menu Bar

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Every application in Facets has a menu bar identifying commands and related dropdown options. Select these to perform specific actions and functions in an application. **File**, **Edit**, **View**, **Window**, and **Help** are standard commands found on the menu bar. Additional commands (e.g. **Actions**, **Filters**, **Transfer**) may appear on the menu bar of selected applications.

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**Note:** Depending on a user's Logon ID, security may be established that will limit access to specific commands and related dropdown options.

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Each command in the menu bar will have one letter underlined (this menu bar, as well as the options in each menu dropdown, will vary from application to application in Facets). Select the **Alt** key once and the underlines should appear in the menu bar. To select a menu bar command using the keyboard, select and hold the **Alt** key, then select the underlined letter of a menu bar command. For example, **Alt+F** is the key combination to select the **File** command.

Regardless if the keyboard or mouse is used to select a menu bar command, a list of options will dropdown in a menu fashion. Selecting an option from the menu will cause Facets to perform that option as it relates to the selected menu bar command. Use the up and down directional arrow keys to scroll the menu list and select an option, then select **Enter**. The same could be done using the mouse and selecting the menu option.

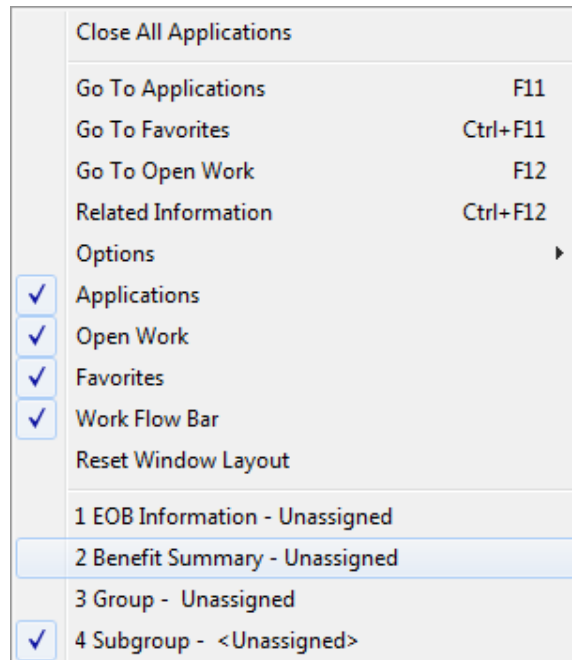
An option listed under a menu bar command may have a small arrow to the right of its description. This indicates a submenu is associated with the selected option. To view the options listed in a submenu, select the underline letter of the menu option that shows the small arrow, or select the option with the mouse.

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**Note:** Some menu options display a "quick key" combination (e.g. **Alt+F9**) to the right of their description. Before selecting the **Edit** command, you can select **Alt+F9** to select the **New Medicare Member...** menu option. Quick key combinations like (**Alt+F9**) require familiarity with the Facets menu bar commands and options.

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The applications listed at the bottom of the **Window** menu are all the applications/records that are currently open. Selecting a listed application with the mouse, selecting one and then selecting **Enter** or typing the number that appears to the left of the application are all ways to display that selected application in the **Workspace** area.



## Navigation Commands on the Window Menu

Window menu commands enable users to open or close the Applications, Open Work, and/or Favorites Navigation tabs, or to set focus on the tab.

## Shortcut Keys

The following hot keys may be used to open the Go To menu options:

- Select **F11** to open the **Go To Applications** tab
- Select **Ctrl+F11** to open the **Go To Favorites** tab

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## Show/Hide Menu Options

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These Window menu options enable you to open the selected option if it is closed, or close the selected option if it is open.

- If the Applications, Favorites, or Open Work navigation pane is open, the respective Window menu option will have a check mark next to it
- If a menu option with a check mark is selected, that pane will close and the check mark will no longer display
- If a menu option with no check mark (meaning the pane is closed) is selected, the respective pane will re-display in the position and state (if resized) it was in when last closed, and the check mark will display next to the respective menu option

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## Reset Window Layout

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Select the Reset Window Layout option to reset the three navigation panes to their default setting. (The Facets navigation default is all three navigation panes joined into a single tabbed section and docked on the left side of the screen.)

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**Note:** The Window menu displays when Facets is open, and is not dependent on applications being open.

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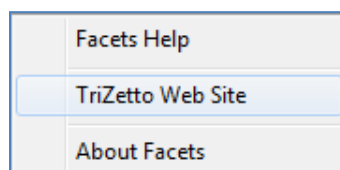
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## Help Menu

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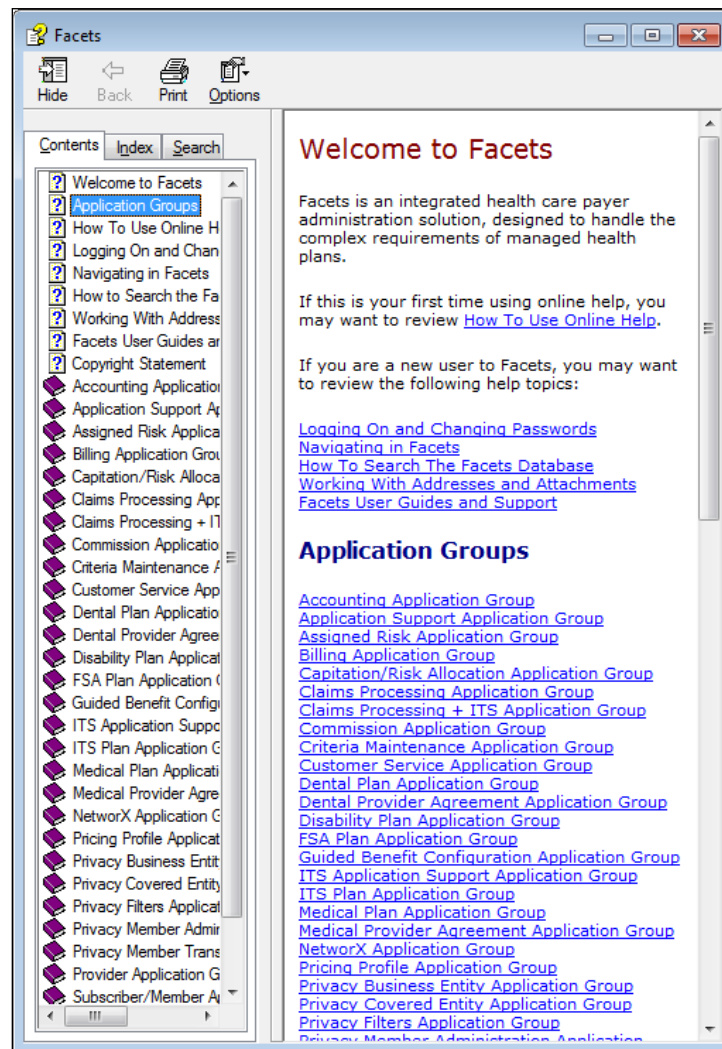
Facets offers three forms of help.

- **Facets Help**  
This menu option offers online help related to Facets applications, fields, processing functionality, managed care terms, and computer terms.
- **TriZetto Web Site**  
This menu option offers direct access to TriZetto's website on the Internet. From the website, users who have a User ID and Password may use the Customer Entrance link to access Customer Exchange, which will offer the most current information related to system enhancements, fixes and various releases of Facets.
- **About Facets**  
This help menu option offers an identity window for the current version of Facets that is running. The window indicates the release value, copyright, and license information.



## Accessing Help

Step	Accessing Help Procedures
1	Facets 'help' is accessed by selecting <b>Facets Help</b> from the <b>Help</b> menu ( <b>Alt+H</b> ) or <b>F1</b> on the keyboard.
2	To use this option, select <b>Help</b> followed by the selection of links thru the <b>Contents</b> , <b>Index</b> or <b>Search</b> tabs (shown below)



### Keep in Mind...

While in an application, if the usual underlined letter for a menu bar command (e.g.: T for **Transfer**) is also used in the application to jump to a field (e.g. **Total Charge** field in the Medical Claims Processing application), select **Ctrl+F10** to activate the **Menu** bar. Once in the menu bar, select the underlined letter of a command. There is no need to hold the **Alt** key while selecting the letter key.

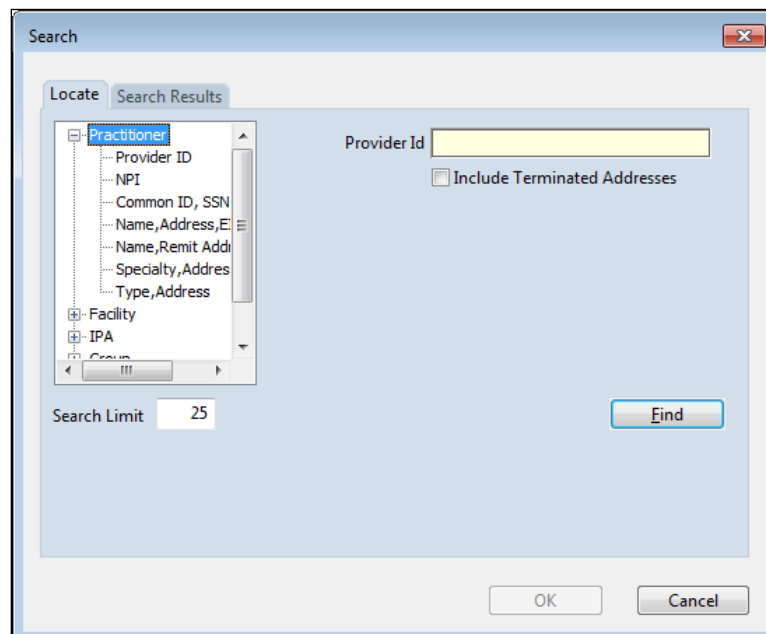
## Search Function

This function allows the user to find a file to open or find information necessary to complete a field entry. Users may enter partial or complete information as search criteria and the system will search the database and display all records that match the criteria. In addition, there are search functions specific to inquiry applications; e.g. Claims Inquiry.

### Opening Search

Step	Search Procedures
1	<p>Select the <b>Search</b> button (<b>Alt+S</b>) from a dialog box</p> <p>OR</p> <p>Select the <b>F7</b> key when the cursor is in a searchable field</p> <p>OR</p> <p>Select the <b>Search</b> menu option for a menu bar command or button bar.</p>

The following **Search** dialog box was invoked by selecting **F7** from the **Provider ID** field in the Medical Claims Processing application.



The **Locate** tab of the **Search** dialog box will indicate the criterion that is used to complete a search.

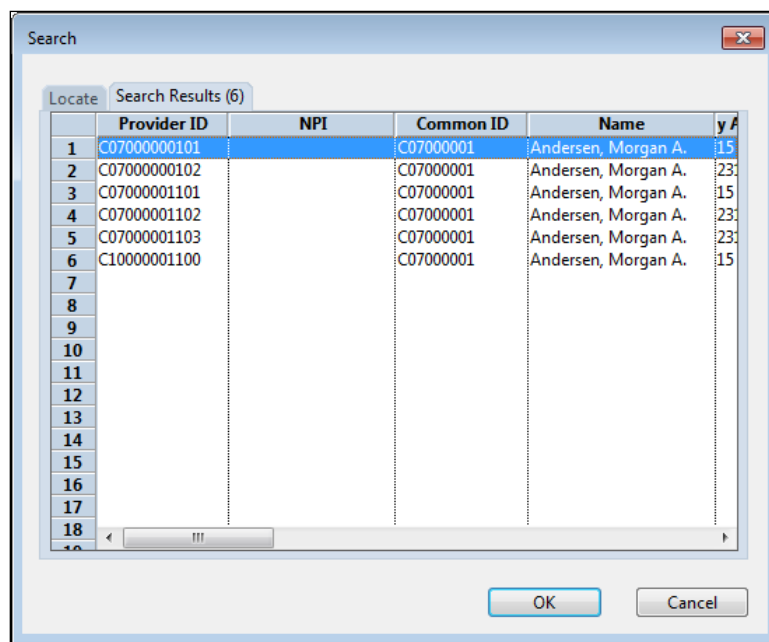
If a plus sign (+) appears to the left of a criteria selection, this indicates the criteria may be expanded to show more options available to perform the search. When different criteria are selected, the field to the right (e.g. "Provider ID") changes and different fields may display.

From a **Search** dialog box, a user may enter complete or partial information in the criteria fields. Then, the user may select the **Find** command button to start the search.

The Search Limit field allows users to determine the maximum number of records that may be returned in the search. The higher the number, the longer the search may take. The default number of records is determined by a system parameter. The wildcard symbol of a percent sign (%) may be used to expand a criteria data element for a search. When the search results display, the following message may appear, "Search results have been truncated".

## Search Results

The system searches the database for all records that match the information entered in the search criteria fields. Those files or records that match the criteria are automatically displayed in the **Search** dialog box under the **Search Results** tab. The user would then select the row of the file to be opened or whose ID will be entered in a searchable field after the **OK** button is selected.



The **Search** dialog box is no longer in the **Locate** tab view, but now in the **Search Results** tab view. The tab also indicates the number of files that were found from the online search.

The vertical and horizontal scroll bars are very useful in finding a specific file that is included in the results of the search.

You can re-sort the list of file rows that the application returns after completing a search. You can sort information by a specific column heading in either ascending or descending order. Ascending order is the default sorting order for an information grid.

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**Note:** Sorting may be performed in other grids displayed in Facets, if a small arrowhead displays when the column heading is selected.

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**Note:** The order and content of the columns that appear in the **Search Results** grid may be customized by the System Administrator. The Search Results illustrated here may appear different from the way the product appears on the desktop.

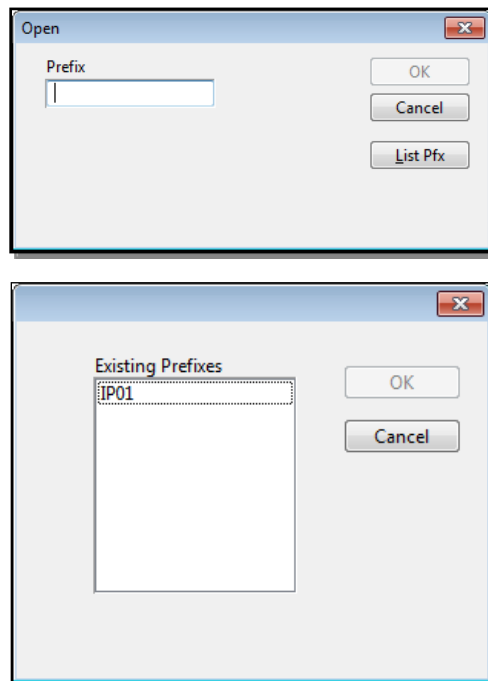
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### **Keep in Mind...**

The only time a search is case sensitive is when the criteria field in the search is the key to the file, such as searching for a group by a Group ID or a practitioner by a Practitioner ID. For example, if a capital 'T' is typed in the Provider ID field, none of the rows returned would list a practitioner whose ID started with a lowercase 't', even though there are existing practitioners whose ID's begin with a lowercase 't'.

Most **Open** dialog boxes in Facets include a **Search** button (**Alt+S**), which is a function that is also found in many dialog boxes as a command button, button bar option, or menu bar option. The ability to search is also available as a function key (**F7**), which you can use when the cursor is in a searchable field. The left side of the **Status** bar at the bottom of the **Navigation** window displays: Select **F7** to Search when the **F7** key may be used in a searchable field.

Instead of a **Search** button (**Alt+S**); some applications offer a **List Pfx** command button that displays a **Prefix Selection** dialog box when selected. This type of dialog box offers a listing of existing prefixes, one of which may be selected to open a specific record.



### **Keep in Mind...**

When searching for non-numeric criteria the application ignores, vowels, common descriptive words, double consonants and most articles, prepositions, and conjunctions.

Correct spelling is not necessarily required, but some results may be unexpected. For example, if a user misspells ANESTHESIA as ANETHESIA, the Search returns ANTIHISTAMINES because Search ignores all vowels, so the Search uses NTHS instead of NSTHS. Alternatively, if entering Cornea as a diagnosis description, the search uses CRN, which results in Cornea, Cranial, and Coronary.

If more than one criterion is entered, they should each be separated by a space.

To limit the scope of time spent on the search, type as much matching criteria as possible.



## Searching for Procedures and Diagnosis Codes

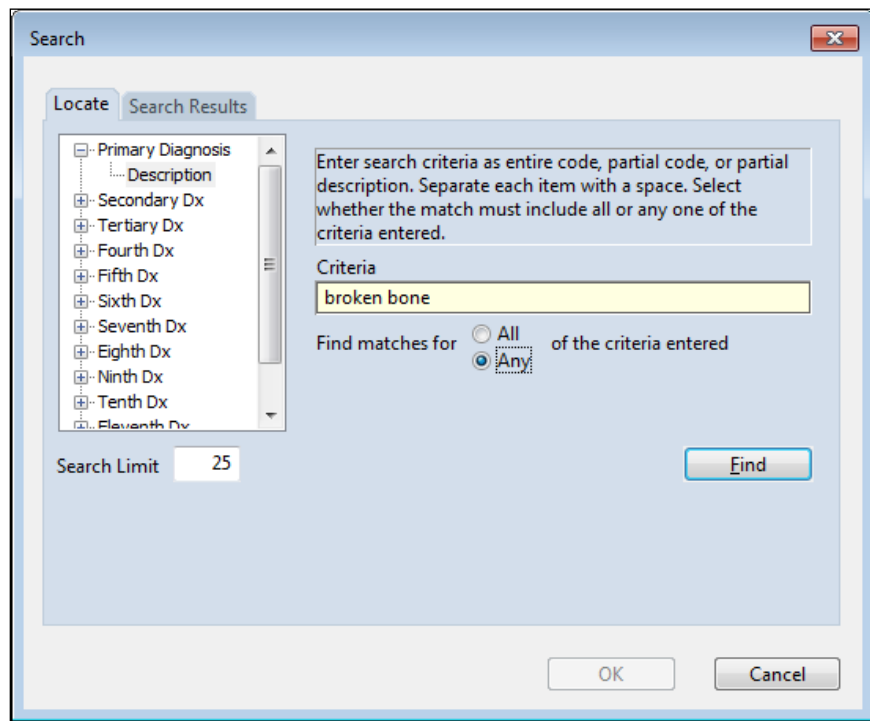
When searching for a Procedure or Diagnosis code, a user may enter an entire code, partial code, or partial description made up of whole or partial word or words. The diagnosis and procedure code search is not case sensitive.

**Note:** The system must be set to search for procedure and diagnosis codes phonetically. A description of how to run the batch program to build the phonetic indices is found in the *Facets Operations Reference Manual*.

The **Search** dialog box for a procedure code or a diagnosis code resembles and follows the same rules as the **Search** dialog boxes that are shown after selecting **F7** from a field or selecting a **Search** command button in an **Open** dialog box. Two differences in this **Search** dialog box are:

The criteria field does not change.

There is an addition of radio buttons, which offer the ability to search for 'All' or 'Any' of the entered criteria.

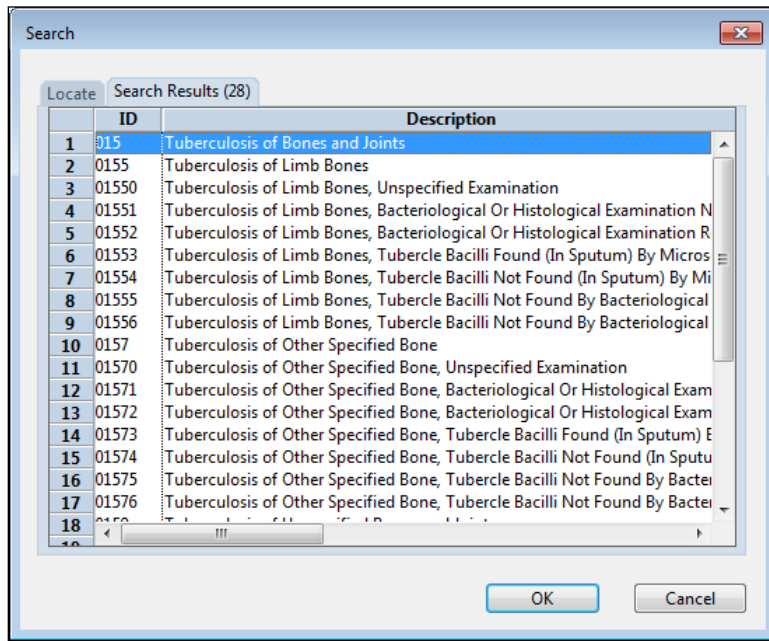


If different pieces of information are entered in the **Criteria** field, the user must select to match by 'all' the criteria or 'any' of the criteria.

When selecting **all**, only codes containing all the criteria entered display.

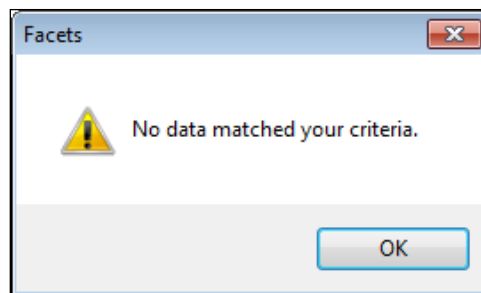
When selecting **any**, all codes including at least one of the criteria entered display.

All the rows that qualify for the entered search criteria are displayed in the **Search** dialog box; and the search limit is ignored.



### No Matches Found Searching for a Procedure or Diagnosis Code

If no procedure or diagnosis codes are found that match the exact criteria entered in a Search dialog box a message displays.

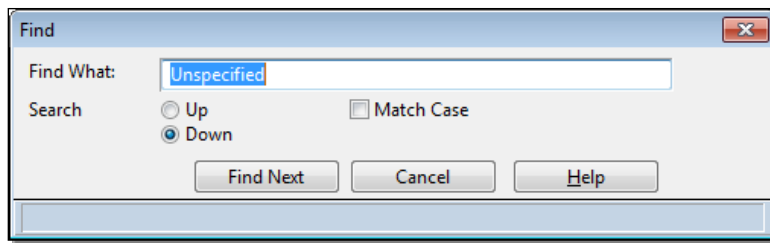


## Using Find

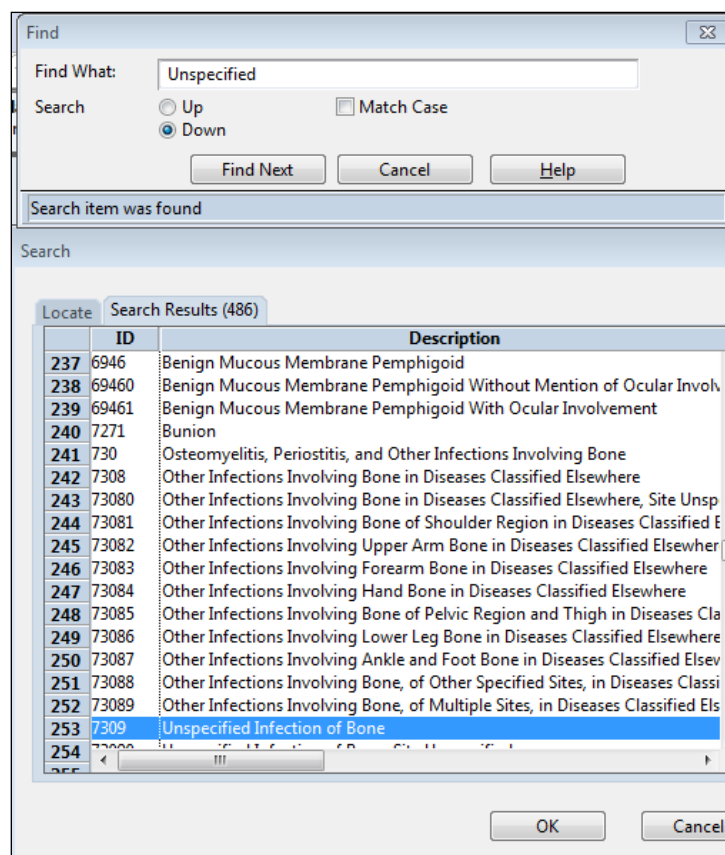
Users may search for specific data in the **Search Results** grid. This is useful when the results are numerous, and specific files or records need to be reviewed.

## Using Find

Step	Using Find Procedures
1	Use the right mouse button to select the column heading in which to find information. The <b>Find</b> dialog box opens.



Step	Using Find Procedures
2	Enter the criteria in the <b>Find What:</b> field.
3	Select the <b>Up</b> or <b>Down</b> option button depending on whether the Find Search should go up the column or down the column.
4	Select the <b>Match Case</b> check box if the Find Search should match words by case exactly.
5	Select <b>Find Next</b> . Facets will find the first row in the column that matches the criteria entered. Select <b>Find Next</b> again to continue the search to find the next matching row.



In the example above, the user initially searches for a diagnosis code using the words “broken bone”. After the search results display, you then uses the **Find** function to find a listed description that includes the word **Unspecified**. Using the right mouse button, select the **Description** label. The **Find** dialog box displays. Enter **Unspecified** in the **Find What** field, select the **Down** button, and then select the **Find Next** button. If the application finds a match, the message Search item that is found displays at the bottom of the **Find** dialog box, and the matched row is selected in the **Search Results** grid.

### Keep in Mind...

The Find function is available in other lists that appear in various Facets applications, and is not exclusive to **Search Result** grids.

## Navigation Window

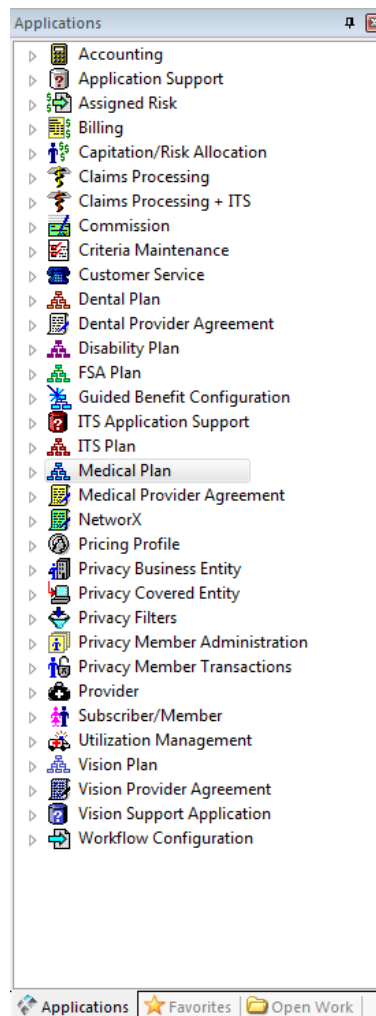
### ③ Navigation Area

The left side is the Product Navigation panel of Facets. The three tabs, **Applications**, **Open Work**, and **Favorites**, which are identified at the bottom of the area, offer different views of the **Navigation** area.

**Note:** The active tab has black text, while inactive tabs have gray text.

### Applications tab

The Applications tab is the default-view that displays once a user has successfully logged into Facets. A navigation tree format is used to list application groups and applications. The navigation tree lists all application groups a user has security to access, from which a specific application may be selected.



Using the Navigation Area	Function
Gray Triangle	The gray triangle to the left of an application group icon indicates that you can expand the group to list applications.
Black Triangle	A black triangle indicates the application group has been expanded, and it may now be collapsed to show only the application group name.

## Navigating

Navigating may be done quite easily by using the mouse. Selecting an application group name or the gray triangle will expand it to list available applications. Double-clicking an application name will open the application in the Workspace area.

## The Keyboard

Users that prefer using the keyboard will find there are numerous keys that used to navigate in the **Navigation** area. The up (↑), down (↓), right (→), and left (←) directional arrow keys, along with **Page Up**, **Page Down**, **Home**, **End** and alpha letter keys (the first letter of an application group name or an application name) are all used to move along the Navigation Tree or select a listed item in the tree.

## Opening an Application Group

When an application group name is highlighted, press the right directional arrow (→) key to expand the group. To reverse this action or collapse an opened application group identified by a black triangle, press the left directional arrow (←) key while the application group name is highlighted. The same may be done using the mouse by selecting the black triangle.

## Open Work Tab

When a user double-clicks an application after selecting an application, the active tab at the top of the **Navigation** area will change from Applications to Open Work. The Workspace will also change to display the selected application screen.

The yellow folder icon will indicate “Unassigned” if a file or record has not been opened within the application. If a file is open, then the name or description of that file will be displayed to the right of the folder icon. An expanded folder, identified by a black triangle will list the sections of an application; a blank page icon represents a section.

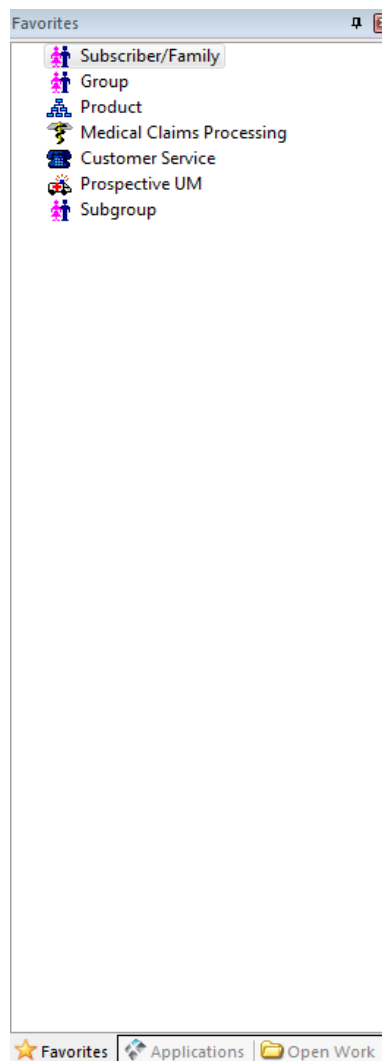
Using the mouse to select either the gray or black triangle, or double-clicking an application or application group, will either expand or collapse that selection.

Respectively, the right directional arrow (→) or left directional arrow (←) keys may be used to expand or collapse listed applications and application groups.

## Favorites Tab

The new Favorites tab enables users to select the most frequently used Facets applications and keep them in one place for easy access, increasing productivity and saving time.

Select **Ctrl+F11** or select the Favorites tab to access the collection of Facets applications. Users can also open this tab by selecting Go To Favorites from the Windows menu.



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### [Adding Applications to the Favorites Tab](#)

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The applications display in the order they were added from top to bottom. Once you have assembled a collection of Favorites, those applications can be reordered or removed, as desired.

### [Adding Favorites](#)

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Step	Adding Favorites Procedures
1	Open the <b>Applications</b> tab.
2	Right click on an application name. A pop-up menu displays the option <b>Add to Favorites</b> .
3	Select the <b>Add to Favorites</b> option. The system adds the application to the <b>Favorites</b> tab at the bottom of the list of applications.

### [Reordering Applications within the Favorites Tab](#)

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Users can rearrange the order of the applications in the Favorites tab by selecting the application, dragging, and dropping it to the desired spot in the list. The application being moved will be inserted above the application over which it is dropped.

If an application is dragged and dropped below the last application in the list, the dropped application is moved to the bottom of the list. An application cannot be moved outside of the Favorites pane.

### [Removing Applications from the Favorites Tab](#)

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Step	Removing Favorites Procedures
1	Open the <b>Favorites</b> tab.
2	Right click on an application name. A pop-up menu displays the option <b>Remove</b> .
3	Select <b>Remove</b> . A confirmation dialog box displays.
4	Select <b>Yes</b> .



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## Moving and Docking Navigation Tabs

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Users can undock, move, and re-dock the tabbed Navigation pane horizontally or vertically within the Facets frame to view more of the application screen and use the navigation tabs more efficiently.

## Moving and Docking the Tabbed Navigation Pane

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Step	Moving and Docking the Tabbed Navigation Pane Procedures
1	<p>Select anywhere in the label at the top of the navigation pane (below the File and Edit menus), such as on the word <b>Applications</b>, and begin to drag it across the screen to the right. The navigation pane is now undocked and your mouse controls where it moves.</p> <p>As soon as the pane is undocked, the <b>Window Frame Docking Controls</b> display at the center, top, bottom, left, and right hand sides of the screen.</p> <p>Each control enables that particular section of the Facets frame for docking.</p>
2	<p>Drag the undocked navigation pane over any of the Window Frame Docking Controls. An area of the Facets screen becomes highlighted. This highlighted area is the place where the pane can be docked.</p>
3	<p>Release the mouse button to drop the pane. The pane is now docked on the right hand side of the Facets frame. You can use the navigation tabs normally.</p>

## Important Points about Docking

- An undocked pane can be placed anywhere on the screen, inside or outside of the Facets application frame, as well as anywhere on the screen of a second monitor. Use your mouse to drag and drop the pane at any place you like.
- Double-click on the pane label to automatically dock or undock the pane.
- If the pane is docked and you double-click on the pane label, the pane will become undocked.
- If the pane is undocked and you double-click on the pane label, the pane will return to the last docked location.
- If you close Facets and reopen it later, the navigation pane will be in the same position it was when Facets was closed.
- If you undock the pane and resize it, then dock it again within the Facets frame, the pane will return to its original size.

## Separating Tabbed Panes

Users can separate the three tabs of the Navigation pane so that each one is a single pane that can be moved or docked.

## Separating Tabbed Panes

Step	Separating Tabbed Panes Procedures
1	<p>Select the tab label at the bottom of the pane and drag the tab away from the frame, or right-click on the pane label at the top of the pane, and select Floating from the pop-up menu.</p> <p>The chosen pane will separate from the Navigation pane it was joined to, and its tab will disappear. Now the chosen pane can float, or it can be docked within the frame.</p>

## Rejoining Separated Panes into Tabbed Panes

Right-click on the pane label and select Docking from the pop-up menu. Now the three tabs are joined in the Navigation pane, and the Navigation pane is docked on the right side of the Facets screen.

## Rejoining Separated Panes

Step	Rejoining Separated Panes Procedures
1	<p>Select the Applications pane label and drag it over the Open Work/Favorites navigation pane,</p> <p><b>OR</b></p> <p>Right-click on the pane label and select Docking from the pop-up menu. Now the three tabs are joined in the Navigation pane, and the Navigation pane is docked on the right side of the Facets screen.</p>

## Docking Panes Side by Side

Step	Docking Panes Side by Side Procedures
1	Select the Applications pane label and drag it over the Workspace near the Navigation pane. The center <b>Window Frame Docking Control</b> appears.
2	Drag the Applications pane over the left or right arrows of the docking control. The place where the Open Work pane will be docked is highlighted. Drop the pane when the highlight is at the desired location.

---

## Stacking Docked Panes Vertically

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Step	Stacking Docked Panes Vertically Procedures
1	Select the <b>Open Work</b> pane label and drag it over the Applications panel. As the mouse moves over the pane, the center pane docking control appears.
2	Position the mouse over the top or bottom arrows of the docking control (the section where the <b>Open Work</b> pane will be docked will be highlighted) and release at desired location.

---

## Resizing Navigation Panes

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Step	Resizing Navigation Panes Procedures
1	Position the mouse over any side edge or corner of the pane. The cursor will become a line with an arrow on each end. This line will be vertical, horizontal, or diagonal depending on the edge of the pane the mouse is hovering over.
2	Click and drag the edge of the pane and move it horizontally, vertically, or diagonally to achieve the desired size and shape.
3	When panes are side-by-side or vertically stacked, click and drag the divider between the panes, or between the pane and open applications, to get the desired size.

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**Note:** In order for diagonal resizing to occur, the pane must be undocked.

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## Auto-hide Navigation Panes

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Users can configure the navigation panes to be in auto-hide mode so they are temporarily hidden but not closed. This way, the entire Facets screen displays, but users can access the navigation panes quickly.

### Auto-hiding Navigation panes:

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Step	Auto-hiding Navigation Panes Procedures
1	At the top of each pane, locate the small pushpin icon. The pin icon is in a vertical position, indicating the panes are not in auto-hide mode.
2	Select this pin icon. The pane will slide closed into the side of the screen at which the pane is docked. In this example, navigation panes on both sides of the Facets screen are now hidden, with the names of the panes displaying at the margins of the screen.
3	While in auto-hide mode, to view the hidden pane again, use the mouse to roll the pointer over the name of the navigation pane on the margin of the screen. The navigation pane displays, and the pin icon is in a horizontal position because pane is in auto-hide mode.
4	To close pane again, move the mouse away from the pane and the pane will roll closed automatically.

### **Important Points about Auto-hide Mode**

- If a page is selected in the open auto-hidden pane, the pane will remain open until focus is changed by selecting anywhere else outside of the pane.
- To undo auto-hide, roll open the pane and select the pin icon again. The pin icon will become vertical and the pane remains in the current position and will no longer automatically roll closed.

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## Closing Panes

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To close a pane, select the red X button in the top right corner.

Note: The X is not always visible depending on what position the pane is in (i.e., in auto hide mode, pinned, separated, etc.).

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## Resetting/Restoring Navigation Pane to Default Location

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The Facets default position for the navigation pane (all three Applications, Open Work and Favorites panes) is the tabbed pane (where all three panes are docked together as tabs) and is located on the left side of Facets window.

After panes have been moved or closed, they can be restored individually or all at once to the initial Facets default position by selecting that option from the Window menu.

If you move navigation panes prior to closing Facets, the next time you open Facets the panes display in the same position.

## Moving the Workflow Task Bar

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The Workflow Task Bar can be manually undocked from its default position in the upper left corner of the Facets screen.

## Opening Multiple Applications in the Workspace

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Multiple applications can be open at the same time in the Facets Workspace and worked with in turn. Each open application has a tab at the top of the application panel that shows the name of the application and the record key that is currently open.

The tab of an application in focus is a lighter color than other application tabs, there is also an icon of a white X in a red box.

## Moving Applications within the Workspace

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You can move multiple applications to display within the Facets frame side by side, vertically stacked, or a combination of both.

## Placing Applications Side by Side

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Step	Placing Applications Side by Side Procedures
1	Select one of the application tabs and drag it downward. A small page icon displays by your mouse.
2	Drop the page icon anywhere in the application space. The applications will be placed side by side.

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**Note:** The number of applications that can be placed side by side is limited to the amount of workspace available. As each additional application is placed in this position, less workspace will be visible for each application.

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### Vertically Stack Applications

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Step	Vertically Stack Applications Procedures
1	Starting with applications in the tabbed layout (not side by side), select one of the application tab labels. A small page icon appears by your mouse.
2	Drag the page icon to near the bottom of the Facets application frame until an outline appears around that area of the Workspace. This is the place that the application can be moved to.
3	Drop the page icon. The two applications are now stacked vertically.

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**Note:** The number of applications that can be vertically stacked is limited to the amount of workspace available. As each additional application is placed in this position, less workspace will be visible for each application.

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### Combined Application Groupings - Side by Side

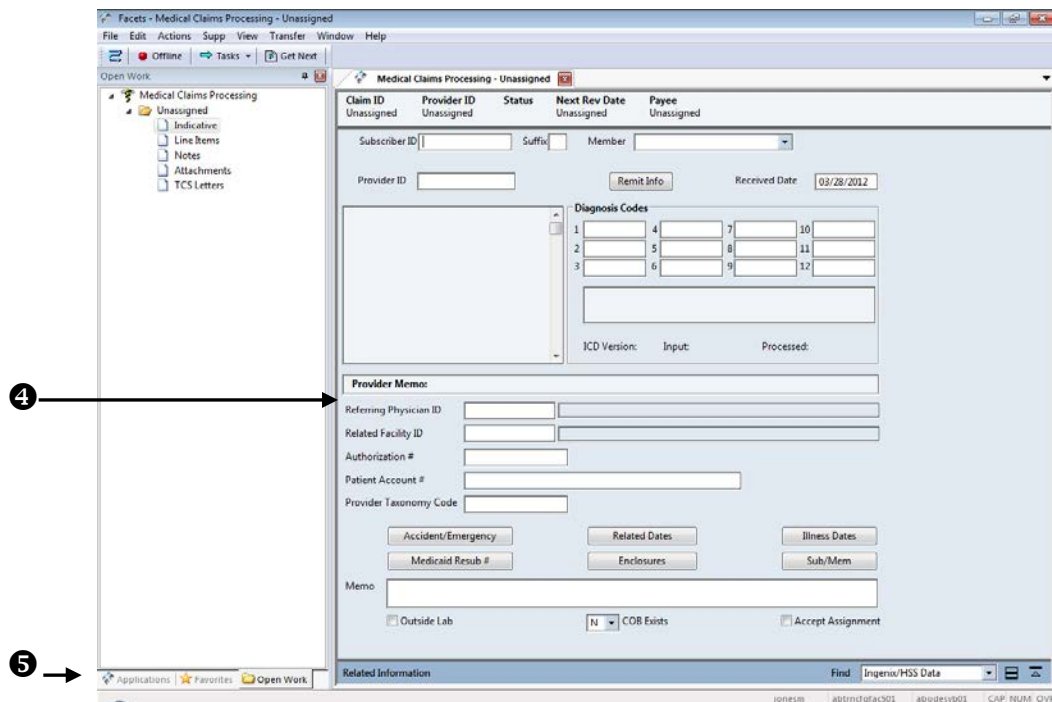
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Application tabs can be grouped together on one side of the panel while another application displays on the other side.

Step	Combined Application Groupings - Side by Side Procedures
1	Open three or more applications.
2	Select one of the open application tabs and repeat the steps in <i>Placing Applications Side by Side</i> to create a side-by-side placement. The two remaining tabbed applications will remain as a tabbed grouping on the other side of the Workspace.

## ④ Workspace

This area of the Navigation Window changes depending on which application is selected in the **Navigation** area of Facets. When initially in the **Applications** tab view, the **Workspace** will display a 'logo' screen. If an application is selected from the **Navigation Tree**, the **Open Work** tab will become active and the **Workspace** will display a screen associated with the selected application. If the user goes back to the **Applications** tab view (**F11**), the Workspace will display the screen of the last application the user was working from.



The **Workspace** is composed of several elements that provide details related to a selected application or a file that has been opened in the application. These elements include a **Button Bar**, **Record Information** area, **Command** buttons, **Section** tabs, various types of fields and grids, and a **Related Information** area.

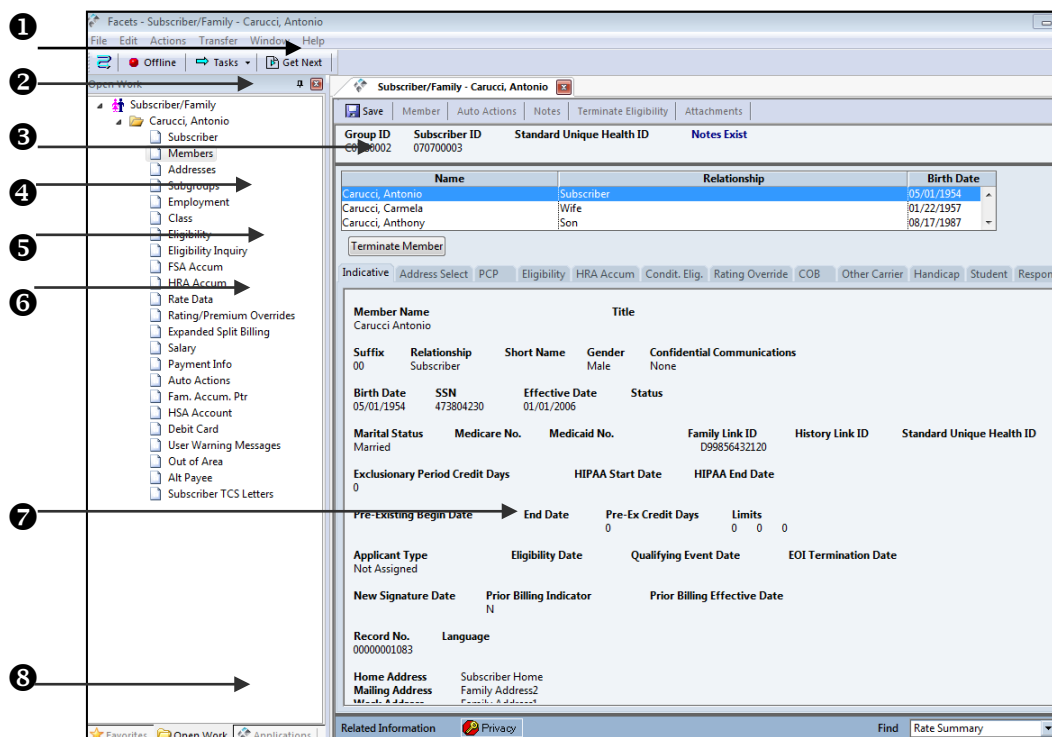
## ⑤ Status Bar

This portion of the **Navigation** area serves two purposes: while in an application, the left side of the **Status Bar** may display the status (e.g. Saving..., Ready...) of the current application, or it may offer instructions related to a specific field (e.g. "Select **F7** to Search..."). The right side of the bar identifies logon status information, which includes Logon ID, Database name (pzb file), and Server ID.

## Facets Workspace Details

The area to the right of the **Navigation** area in Facets is the **Workspace**, and it is here where details concerning a selected application or file display. Various text formats show information concerning an application. They are identified in the screen print below with numbered bullets.

- ① Button Bar
- ② Record Information
- ③ Field
- ④ Grid
- ⑤ Command Buttons
- ⑥ Section Tabs
- ⑦ Textout Area
- ⑧ Related Information

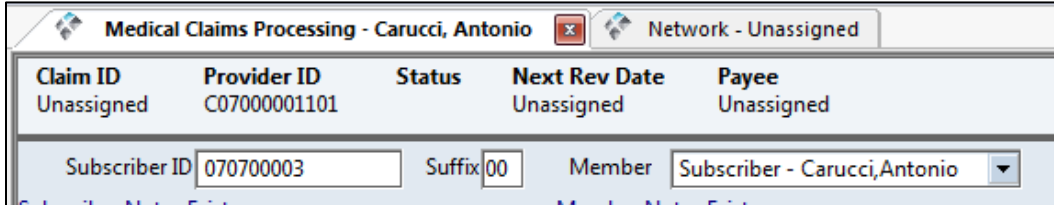


A **Button Bar** (①) is not available for all applications in Facets. If it is available, it is displayed directly above the **Record Information** (②) title bar. The selectable options on the **Button Bar** are usually available as options under a command in the **Menu Bar** at the top of the **Navigation** window. These buttons are provided in the Workspace as a quick way to perform actions that are part of a usual workflow, such as the **Save** button, which has the standard Windows **Save** icon.

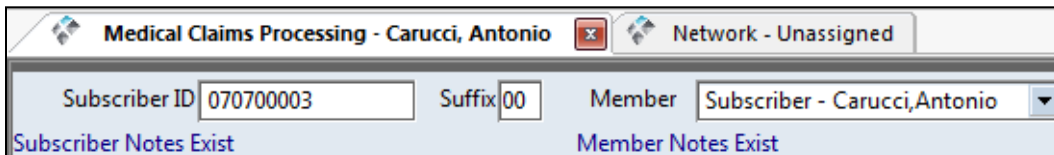
The **Record Information** (②) area contains information for the current record that is opened in the Workspace. One or more pieces of information displayed in this area is recognized as an identifying 'key(s)' to the record or file, and was used to initially create or open the file.



The **Title tabs** of the **Record Information** area offer the ability to resize the display area, showing only the **Title tabs** and not the text-out information. The system default is to display the Record Information in an expanded view.



The bottom border of the **Record Information** is a drag bar that may be selected with a mouse and moved either up or down to resize the **Workspace** area.



As a drag bar, the bottom border of the **Record Information** area may be utilized to fully resize the **Record Information** area in the **Workspace**.

Most of the information entered and maintained in Facets is done so by the use of various types of data **Fields** (③).

## Smart Edits

These fields automatically format date, telephone number, ZIP code, and currency fields by inserting separators, parentheses, leading nines, zeros, and decimal points. One purpose of Smart Edits is to lessen the number of keystrokes required. Smart Edit fields also insert leading year information (e.g. 19 or 20) as related to a century entry.

Smart edit Date fields use the entry windows of 00-29/30-99. This means if a user enters 02 in the century position of a date field, the date displays as 2002; if they enter 32 in the century position of a date field, the date displays as 1932. The following table illustrates this logic:

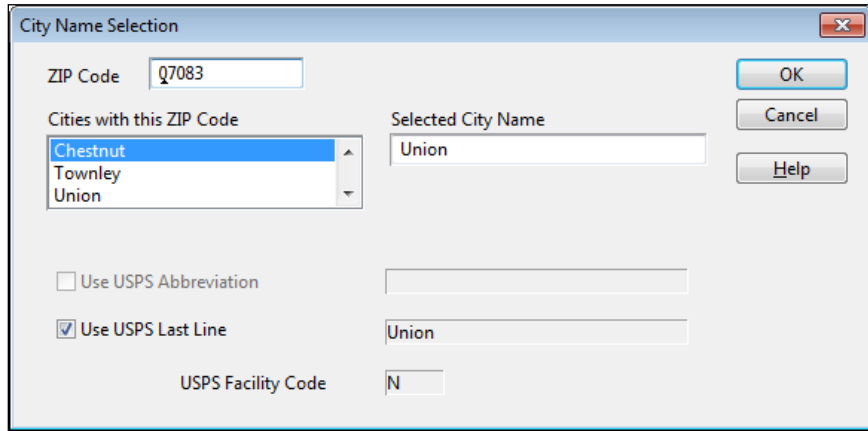
If the user enters...	The century will display as...
00, 01, 02, etc. though 17	2000 – 2017
18, 19, 20	(all 4 digits of the year must be entered)
21 through 29	2021 – 2029
30 – 99	1930 – 1999

### **Keep in Mind...**

The **F2** Function key can be used to clear smart edit fields.

### **Keep in Mind...**

If there is more than one city name associated with a ZIP Code, the **City Name Selection** dialog box automatically appears with a list of city names recognized by the U.S. Postal Service for that ZIP Code. From the city listing, double-click the selected city name, it displays in the **Selected City Name** field. After you select **OK**, the application copies the selected city to the **City** field for the address you are adding or modifying.



The image shows a 'City Name Selection' dialog box. It has a title bar with a close button. Inside, there's a 'ZIP Code' field with 'Q7083' entered. Below it is a list box titled 'Cities with this ZIP Code' containing 'Chestnut', 'Townley', and 'Union'. To the right is a 'Selected City Name' field with 'Union' entered. At the bottom left, there are two checkboxes: 'Use USPS Abbreviation' (unchecked) and 'Use USPS Last Line' (checked). To the right of these are two empty text fields. At the bottom right, there's a 'USPS Facility Code' field with 'N' entered. On the far right, there are three buttons: 'OK', 'Cancel', and 'Help'.

A **Grid (4)** is another field in Facets, but each row of information in a grid represents a set of data fields related to one entity.

**Command Buttons (5)** are found throughout Facets and are used to respond to an action taken by a user or the system, initiate a process, or complete a process and transfer to a different window. Standard command buttons found in most dialog boxes include **OK**, **Yes**, **No**, **Cancel**, **Help**, **Search**, **Apply**, and **Undo**.

Most Facets applications are divided into sections as indicated by blank page icons in the **Navigation** area under the **Open Work** tab. Following the same logic, some sections are further split into section tabs **(6)**.

When fields of information display in the Workspace area but are not directly accessible by a field, this is referred to as a Text-out **(7)** area. Text-out areas are usually associated with grids, section tabs, Smart Edit fields, or the results of a system process (e.g. claims adjudication).

Health plans have the ability to display letters, as well as Rate Summary information, in the **Related Information** (8) area of Facets applications. Health plans may use this functionality to enable the display of subscriber, member or practitioner letters in specific applications. For example, while in the Customer Service application, a user may want to view the letters that were recently sent to a caller.

The **Attachments** section of an application provides the means of requesting a letter, but it is limited to listing letters requested from the same application. The **Related Information** area offers the ability to find information related to all letters requested for an entity, regardless of the application the request originated from in Facets.

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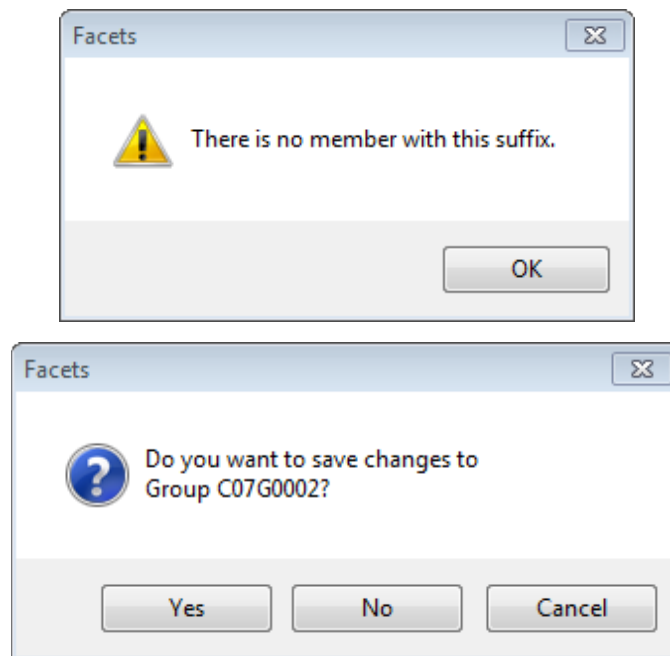
**Note:** Refer to the *Letters Guide* for more information about viewing letters in the **Related Information** area.

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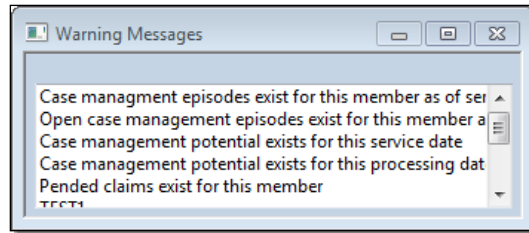
## Pop-up Boxes

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Pop-up boxes display to alert a user to a status of a process, and may also be seen during the entry of data in an application, as the example shows below. The pop-up box to the right is an example of a box that is waiting for a response from a user before completing or proceeding with a process, similar to a dialog box.

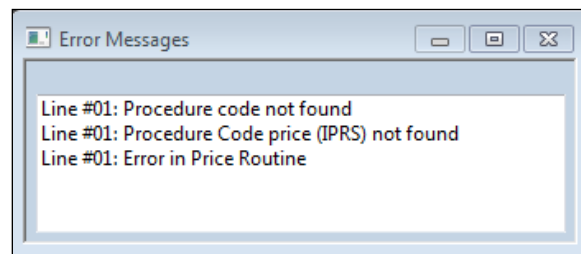


TriZetto supplies system Warning Messages, and for specific record types they may also be created by health plans for their own business needs.



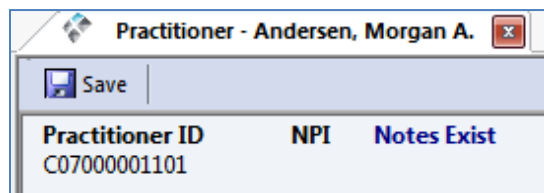
The general purpose of a warning message is to bring attention to a situation related to a record or file in Facets. A warning message may also be used to alert an end-user or a batch job of a situation during a process (e.g. claims adjudication), and cause the process to pend. Depending on the assigned level of security attached to an end-user's Logon ID or batch job, a warning message may be bypassed and not halt the completion of a system process.

System Error Messages are TriZetto supplied, and their general purpose is to alert an end-user or batch job of a critical problem that must be corrected before Facets may complete a process. If the error is not corrected, regardless of security levels, the only options are to pend, route, or void the process. An end-user may also choose to close out of the application, leaving no record of the transaction.



### **Keep in Mind...**

Ultra Blue Messages are file indicators that alert an end-user of a specific status concerning a file or record in an application. The messages are shown in a royal blue color so they stand out from other text on the screen. Some examples of ultra blues messages are: Subscriber Notes Exist, Member Notes Exist, Subscriber Memo Exist, Member Memo Exist, Notes Exist, Reviews Exist, UM Overrides Exist, and Group Terminated mm/dd/ccyy.

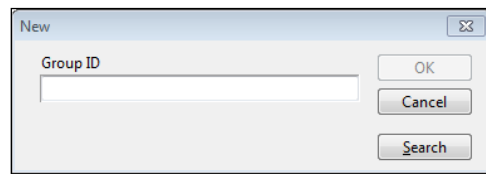


## Opening and Creating Files in Facets

When working in Facets a user is usually doing one of two things, creating a new file (record) in an application, or opening an existing file to either view or update information in the file. Whether a file is being created or being opened in an application, it will be required that a key (in some cases more than one key) is entered in an application to uniquely identify the file. A key in Facets may be identified as an 'ID' or a 'Prefix', or a specific type of information; e.g. Procedure Code, Record Type, Date.

### Creating Files

Step	Creating Files Procedures
1	To create or open a file in Facets a user must be in an application. Once in an application the File command in the menu bar should be selected.
2	<b>File...New (Ctrl+N)</b> or using the mouse to click <b>File</b> and then <b>New</b> will produce the display of a <b>New</b> dialog box.



### Keep in Mind...

Not all applications require a user to select **New** from the **File** menu (**Ctrl+N**) in order to create a new record. In some cases, the **New** menu option is either grayed-out (disabled) or omitted as a menu option.

Most **New** dialog boxes include a **Search** button, which may not be necessary when creating a file, but is quite valuable in an **Open** dialog box. The **Search** function follows the review of opening a file.

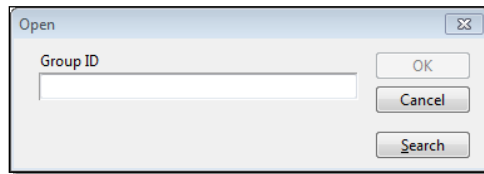
Some **New** dialog boxes offer a **Help** button; giving users the ability to reference help about the application they are currently working in.

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## Opening Files

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Step	Opening Files Procedures
1	<b>Open</b> from the <b>File</b> menu ( <b>Ctrl+O</b> ) or using the mouse to click <b>File</b> and then <b>Open</b> will produce the display of an Open dialog box.



Like New dialog boxes, **Open** dialog boxes may vary in appearance based on the application from which they were invoked. Prefixes that are entered in an **Open** dialog box must always be valid.

### **Keep in Mind...**

Not all applications require a user to select **Open** from the **File** menu (**Ctrl+O**) in order to open an existing record. These applications will not list **Open** as a menu option under the **File** menu.

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**Note:** For additional information on Navigation, refer to the Getting Started User Guide in Customer Exchange.

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