TruCare API Guide

Version 25.1

June 2025

Table of Contents

Overview

The TruCare API web application is a fast, lightweight, and stateless application that provides a RESTful interface to TruCare. This document focuses on RESTful web services.

Topics in this section

Default token

Depending on the web service, you can use a token (DEFAULT) instead of using the member's ID.

Casenet is in the process of making the member ID optional for web services that accept the ID of the entity belonging to that member (for example, authorization ID, case ID, and task ID). In these situations, callers can pass the string DEFAULT instead of a member ID. For example, the GET /members/{memberId}/

authorizations/{authorizationId}/header web service can be used as GET /members/DEFAULT/ authorizations/{authorizationId}/header to return the header on the authorization specified to

the member based on the provided authorization ID. Therefore, the token DEFAULT is reserved and cannot be used as an external member ID. The token DEFAULT is not case sensitive. Not all endpoints have been updated to support DEFAULT. Consult the documentation for each end point.

Note: There is additional overhead for deriving the member ID when DEFAULT is passed and clients should use the member ID if it is available.

Overview » Bundled API

Bundled API

TruCare API is bundled in the TruCare .war file. This allows the installation of both TruCare and TruCare API as a single .war file.

Accompanying artifacts

There are several artifacts that accompany this documentation for every release. You can use these artifacts to help you set up and to test the web services.

API online documentation

You can deploy the online documentation in any test or production environment. You can access the API online documentation from a URL during an API deployment.

The API online documentation contains information that is specific to each web service. The information includes the necessary permissions, the parameters needed to use the web services, the class you can use for the request (which includes the required fields), the class that is returned (which includes information specific to the provided parameters), and any related web services that may help you.

Note: The permissions listed for each endpoint are the maximum that may be required. There may be cases where you can use the endpoint with fewer than the listed permissions if you do not utilize some functionality of the endpoint. For example, the Member Summary screen permission and the Eligibility Benefit Summary screen permission are often listed as required permissions on

assessment endpoints. However, these permissions are required only when you are creating a note that contains eligibility information on an assessment.

API Differences Report

There is a .zip file that accompanies the documentation that contains the changes that were made to the web services between this release and the previous release. This file is referred to as the *API Differences Report* throughout the documentation. This *API Differences Report* compares the current version of APIs against a previous version. There may be more than one *API Differences Report* depending on the upgrade path. You can use this file when moving to a new version of APIs. The *API Differences Report* contains details on the changes that were made to the APIs. You can use the *API Differences Report* to determine if you need to update and how to update any of your files for the new release.

You can download the *API Differences Report* from the Casenet FTP/Portal.

Installing, upgrading, and configuring

This section discusses the process of installing and upgrading the web services.

Topics in this section

This section includes information on installing and upgrading the APIs.

Complete the following sections to ensure the proper configuration of your environment.

Installation and upgrade

This section includes information on installing and upgrading the APIs.

The current version of API is bundled with the TruCare server .war file (casenet-server.war). If you installed TruCare 10.1, you have installed the TruCare API.

Any API with a base URL that was previously http://myhost:port/casenet-server/version can now be reached at http://myhost:port/casenet-server/api-site .

Configuration

Complete the following sections to ensure the proper configuration of your environment.

Topics in this section

You need to generate the bearer token you use in your Authorization Header.

Generate the OAuth2 bearer token

You need to generate the bearer token you use in your Authorization Header.

As per the OAuth 2.0 specification best practices, all communications should be configured to use TLS/SSL.

1. Create a secret text string.

   Minimally, generate a 32-character base64 string. You can generate a longer key, for example 128 or 256 bits.
2. In trucare.properties, set api_user.client.secret to your secret text string.

   As your secret text string is in the trucare.properties file, you should secure and limit access to the file.
3. Call /uaa/oauth/token to generate the bearer token. For example, using cURL:

curl --fail api_user:<secret_text_string>@<myhost>:8080/casenet- server/uaa/oauth/token -d grant_type=password -d username=<username> -d

password=<password>

The command response contains the bearer token. For example:

{"access_token":"eyJhbGciOiJSUzI1NiIsInR5cCI6IkpXVCJ9.eyJleHAiOjE1NDIz Mzg5MTAsI nVzZXJfbmFtZSI6InRjYWRtaW4iLCJhdXRob3JpdGllcyI6WyJBVVRIRU5USUNBVEVEIl0sImp0 a SI6

IjAwYWM3MDAyLTBiMjUtNGVmYi04N2NmLTIyYjUxZjAzY2YxYiIsImNsaWVudF9pZCI6ImFwa V91c2V

yIiwic2NvcGUiOlsiVVNFUiJdfQ.OaMDfZ5if1P0WvtrftcyVh02C6U-qC5QwrXQQE-QnsZOVkr R30N

R1Jcuk5BRdeDcdJwkvVCZw5hCgid2TC_B1_or3n6FQRvQMLmbien904ZnZSWZCtExURnHcP DaNom USv

XPQIGyOddxh4sTr54yNyyKpK11X-2V2bHaO3rbSOvqJQVMlbC9qE9ENvN7i0CeuZ8DFu ZGleyxj5NhB

a-
vkUWP7VT0wMZCIedvY0BgY4KSPaojPAgHsQY59jHNOB5F0-9JKI26N9wDfQp_OpBUFF3NL 5c L8WU_

85ZSt3BfA7Hb1zre61SzCrBoUQNJNGY4dI5urPLcPm7J0MzaeNQQMw","token_type": "bearer",

"expires_in":43199,"scope":"USER","jti":"00ac7002-0b25-4efb-87cf- 22b51f03cf1b"}

Now that you have your bearer token, every API call must include the bearer token in the authorization header.

Bearer
eyJhbGciOiJSUzI1NiIsInR5cCI6IkpXVCJ9.eyJleHAiOjE1NDIzMzg5MTAsInVzZXJfbmFtZSI6InR jYWRtaW4iLCJhdXRob3JpdGllcyI6WyJBVVRIRU5USUNBVEVEIl0sImp0aSI6IjAwYWM3MDAy LTBiMjU
tNGVmYi04N2NmLTIyYjUxZjAzY2YxYiIsImNsaWVudF9pZCI6ImFwaV91c2VyIiwic2NvcGUiOlsi VVN FUiJdfQ.OaMDfZ5if1P0WvtrftcyVh02C6U-qC5QwrXQQE-
QnsZOVkrR30NR1Jcuk5BRdeDcdJwkvVCZ
w5hCgid2TC_B1_or3n6FQRvQMLmbien904ZnZSWZCtExURnHcPDaNomUSvXPQIGyOddxh4 sTr54yNyyK pK11X-2V2bHaO3rbSOvqJQVMlbC9qE9ENvN7i0CeuZ8DFuZGleyxj5NhBa-
vkUWP7VT0wMZCIedvY0Bg
Y4KSPaojPAgHsQY59jHNOB5F0-9JKI26N9wDfQp_OpBUFF3NL5cL8WU_85ZSt3BfA7Hb1zre 61SzCrBo UQNJNGY4dI5urPLcPm7J0MzaeNQQMw

Basic Authentication is currently supported as well.

Integration with Business Rules Engine

Rules configured in the Business Rules Engine (BRE) can be triggered if useRuleOutputs setting is set to true and the configuration in TruCare Admin is enabled. This configuration is available in **Differential Care Management** > **Customer Setup** > **UM** > **Authorization Options** > **Business Rules Engine.** Select the **Allow submit of undetermined SP line items to BRE after initial submit** check box. If this configuration is not enabled, useRuleOutputs should be set to false.

The following classes use the useRuleOutputs field and the classes are used throughout several web services.

- ActionPathRequest
- AddRxLineItemRequest
- AddServiceProcedureLineItemRequest
- AppealActionPathRequest
- CommonActionPathRequest
- ReferralActionPathRequest
- UpdateActionPathRequest
- UpdateRxLineItemRequest
- UpdateServiceProcedureLineItemRequest

Architecture

The following sections describe the architecture of the RESTful web services and their interaction with the TruCare application.

Topics in this section

Learn how the APIs maintain backward compatibility between major releases (see Error handling [16] section).

JAX-RS and Jersey

TruCare API integrates with the TruCare server using RESTful web services implemented using Jersey, a Java API for RESTful Web Services (JAX-RS) implementation.

The web services read and write either JSON or XML to communicate with clients. Use the HTTP Accept header to set the response format, JSON or XML.

If you are running API calls from a browser (for example, when testing), although JSON is the default response format of TruCare API, the default header settings associated with the browser you are using may affect the response content type.

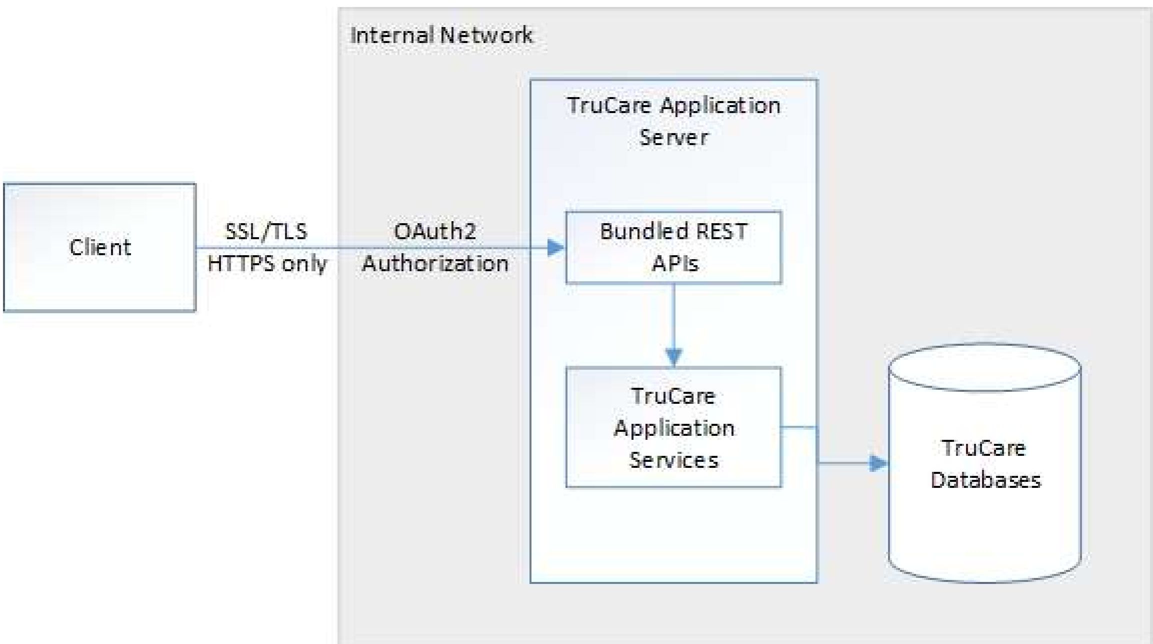
Security and HIPPA concerns

The TruCare API can be configured to use OAuth 2.0 authorization. As per OAuth 2.0 best practices, it is expected that you use TLS to encrypt communications to the TruCare API web application.

For backwards compatibility, you can use basic authentication, but Casenet recommends you update your implementation to use OAuth 2.0 for increased security.

You must create a TruCare user with a defined member filter that is your TruCare API user. The user permissions established in TruCare Admin for this user apply to the API actions.

The following diagram displays the preferred deployment of a bundled API.



This diagram shows a sample topology and does not provide a mandated deployment. Security must be configured on your server and you are responsible for implementing TLS.

Web service callers that do not use the log in endpoint need to include the OAuth token in the Authorization header of every API request to authenticate the user as a session is not created.

Backward-compatibility

Learn how the APIs maintain backward compatibility between major releases.

The TruCare API is released concurrently with TruCare and may have updates that are not backward- compatible. Whenever there is a change to a web service that breaks backward-compatibility, a copy of the web service is made. One copy is the original web service that maintains backward-compatibility. The other copy of the web service that contains a version number (v#) includes a change that prevents backward- compatibility. Both web services are included in a release to maintain backwards-compatibility. In a future release, the original web service (the web service that does not contain the version number) is deprecated.

Error handling

TruCare API generates client errors (4xx HTTP status code) in two basic circumstances:

1. When validations fail
2. When TruCare generates an exception

Validation errors cause a 400 HTTP status in the response, and the response is a JSON or XML object that specifies the offending fields and includes a unique key that can be associated with a message in a resource file.

Use cases for web services

The following sections describe and illustrate the how to use the web services to execute different use cases.

When using the web services, always refer to the test page for the required parameters and the information required in the request.

Topics in this section

You can use web services to interact with the member's eligibility information.

You can interact with a member's email addresses using web services.

You can use web services to interact with member's HCS enrollments.

You may need to interact with the member's inpatient (IP) authorizations using web services.

You can use web services to interact with a member's key metrics.

You can use web services to interact with a member's medications.

You can use web services to interact with member lists.

You can use web services to search for a member.

You can interact directly with the members' records.

You can use web services to interact with a member's networks.

You can use web services to interact with a member's notes.

You can use web services to interact with a member's profile information.

You can use web services to interact with a member's organization contacts.

You can use web services to interact with a member's personal contacts.

You can use web services to interact with a member's phone numbers.

You can use web services to prescreen an authorization before creating the authorization.

You can interact with a member's product features and feature services using web services.

You can interact with a member's program enrollments using web services.

You can use web services to interact with a member's provider contacts.

You can use web services to interact with provider information.

You can use web services to interact with system queues.

You can use web services to interact with a member's referrals.

You can use web services to interact with a member's RFIs.

You can use web services to interact with a member's Rx authorizations.

You can use web services to interact with a member's service/procedure (SP) authorizations.

You can use web services to interact with a member's service requests.

You can use web services to interact with a member's tasks.

You can use web services to interact with teams.

You can use web services to interact with your profile or another user's profile.

You can use web services to interact with other users in regards to the user's user name and using their information for assignee.

You can use web services to update user-defined fields.

You can use web services to parse clinical and advisor review documents.

Addresses

You can use web services to interact with a member's address information.

The following sections describes how to use web services to interact with a user's addresses. For example, you can get the member's addresses, create an address, and update an address using web services.

Topics in this section

You may need to get a summary of the member's addresses to review them. You need specific information to use web services to retrieve a summary of the member's addresses.

You may need to review the details on a member's address. You need specific information to use web services to get the details on a member's address.

You may need to create an address for the member after an appointment with the member. You need specific information to use web services to create an address for a member.

You may need to update a member's address after reviewing it with the member. You need specific information to use web services to update an address for a member. You can use web services to update a member's address.

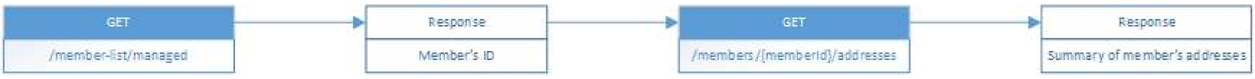
Get a summary of the member's addresses

You may need to get a summary of the member's addresses to review them. You need specific information to use web services to retrieve a summary of the member's addresses.

To get the summary, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a summary of a member's addresses.



1. Retrieve the member ID to be used to retrieve the summary.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/addresses web service to get a summary of the member's addresses.

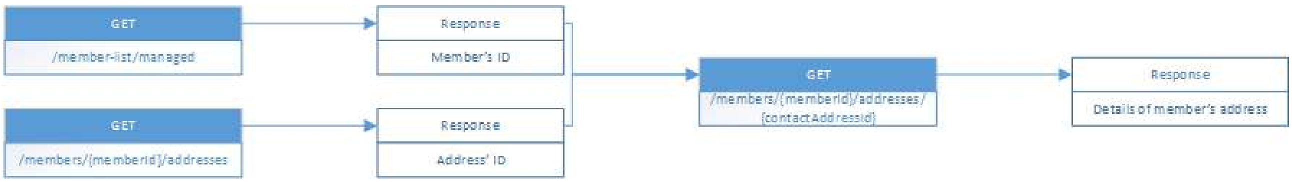
Get the details on a member's address

You may need to review the details on a member's address. You need specific information to use web services to get the details on a member's address.

To get the details on the address, you need the following information:

- Member ID
- Address ID

The following graphic shows how to use web services to retrieve the details on a member's address.



1. Retrieve the member ID to be used to get the address.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/addresses to get a summary of the member's addresses.
4. Store the ID of the address you want to view in detail.
5. Use the member ID, the address ID, and the GET /members/{memberId}/addresses/{contact AddressId} web service to get the details on the member's address.

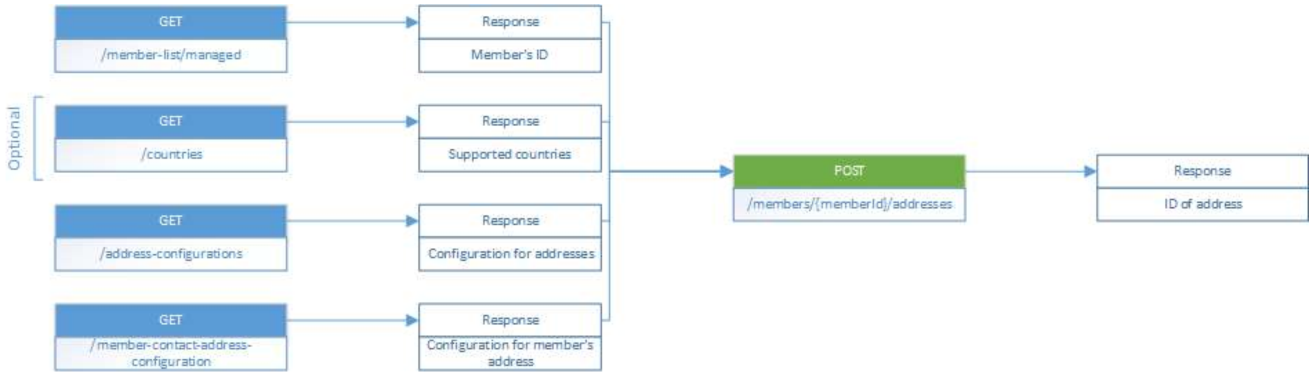
Create an address for a member

You may need to create an address for the member after an appointment with the member. You need specific information to use web services to create an address for a member.

To create an address, you need the following information:

- Member ID
- Information on the supported countries (optional)
- Configuration to create an address
- Configuration for member's addresses

The following graphic shows how to use web services to create an address for a member.



1. Retrieve the member ID to be used to create an address.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. (Optional) If creating an international address, use the GET /countries web service to get the information on the supported countries.
4. Use the GET /address-configurations web service and the country information, if applicable, to get the configuration to create an address.
5. Use the GET /member-contact-address-configuration web service to get the configuration to create an address for a member.
6. Use the member ID, the address information, and the POST /members/{memberId}/address web service to create an address for the member.

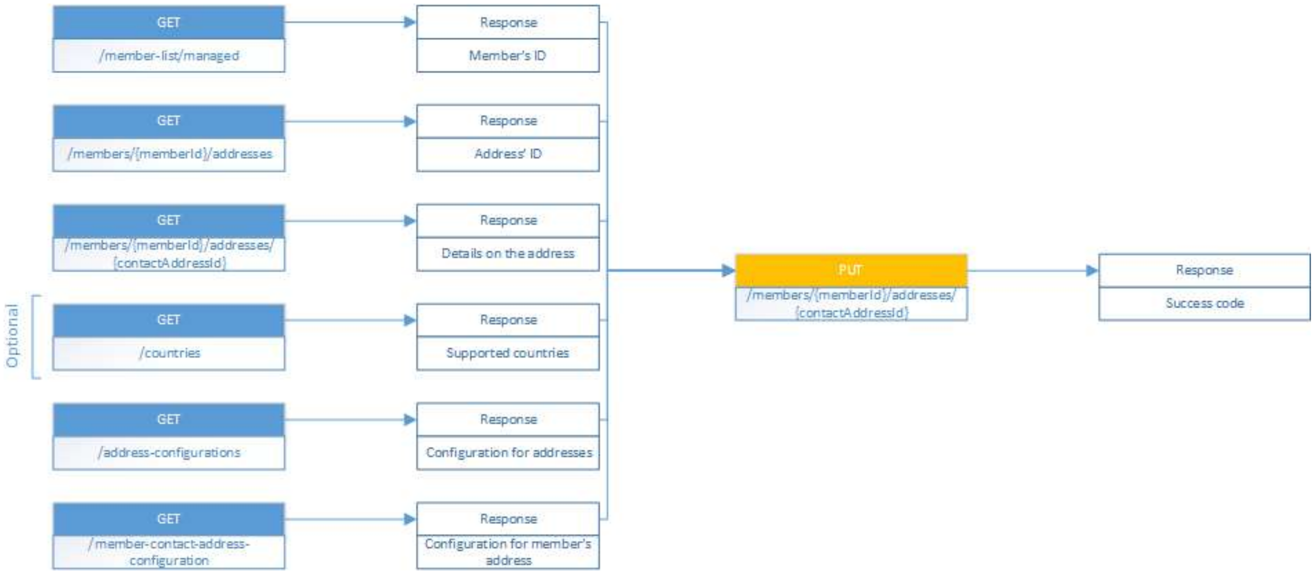
Update an address for the member

You may need to update a member's address after reviewing it with the member. You need specific information to use web services to update an address for a member. You can use web services to update a member's address.

To update an address, you need the following information:

- Member ID
- Address ID
- Details on the address
- Supported countries (optional)
- Configuration to update an address
- Configuration for member addresses

The following graphic shows how to use web services to update a member's address.



1. Retrieve the member ID to be used to retrieve and update the address.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/addresses to get the summary of the member's addresses.
4. Store the ID of the address you want to update.
5. Use the member ID, the address ID, and the GET /members/{memberId}/addresses/{contact AddressId} web service to get the details on the address.
6. (Optional) If updating an international address, use the GET /countries web service to get the information on supported countries.
7. Use the GET /address-configurations web service and the country information, if applicable, to get the configuration to update an address.
8. Use the GET /member-contact-address-configuration web service to retrieve the configuration for a member's address.
9. Use the member ID, the address ID, the updated address information, and the PUT /members/{member Id}/addresses/{contactAddressId} web service to update the member's address.

Allergies

You may need to use web services to interact with a member's allergies.

The following sections describe how to use web services to interact with a member's allergies. For example, you can create an allergy record, update an existing allergy record, and void an allergy record using the web services.

Topics in this section

You may need to retrieve a member's allergy records to review them with the member to ensure the records are accurate. You need specific information to use the web services to get a summary of a member's allergies.

You may need to review a member's allergy in detail to ensure it is accurate. You need specific information to use the web services to retrieve the details on a member's allergy.

You may need to create an allergy for a member if the member had developed an allergy since the previous health visit. You need specific information to use web services to create an allergy for a member.

Update a member's allergy [24]

You may need to update an allergy if a member's reaction has changed or the severity of their reaction has changed. You need specific information to use the web services to update a member's allergy.

Void a member's allergy [25]

You may need to void a member's allergy if it was recorded in error. You need specific information to use the web services to void a member's allergy.

Get a summary of a member's allergies

You may need to retrieve a member's allergy records to review them with the member to ensure the records are accurate. You need specific information to use the web services to get a summary of a member's allergies.

To retrieve the summary of the member's allergies, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a summary of a member's allergies.

1. Retrieve the member ID to be used to retrieve the allergies.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/allergies to retrieve a summary of the member's allergies.

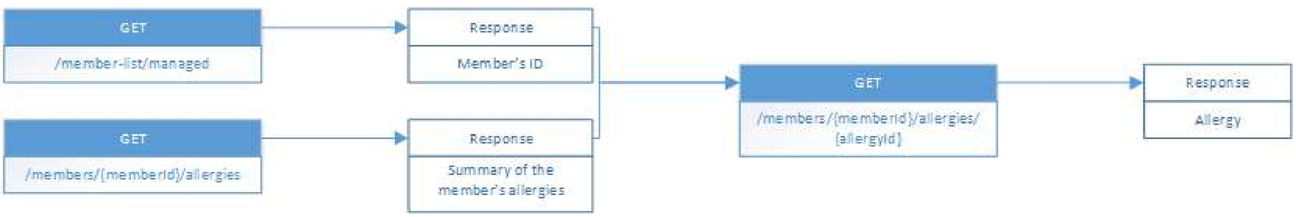
Get the details on a member's allergy

You may need to review a member's allergy in detail to ensure it is accurate. You need specific information to use the web services to retrieve the details on a member's allergy.

To retrieve the a summary of the member's allergies, you need the following information:

- Member ID
- Allergy ID

The following graphic shows how to use web services to retrieve the details on a member's allergy.



1. Retrieve the member ID to be used to retrieve the details on an allergy.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.

3. Use the member ID and the GET /members/{memberId}/allergies web service to retrieve a summary of the member's allergies.
4. Store the ID of the allergy.
5. Use the member ID, the allergy ID, and the GET /members/{memberId}/allergies/{allergyId}

web service to retrieve the details on the allergy.

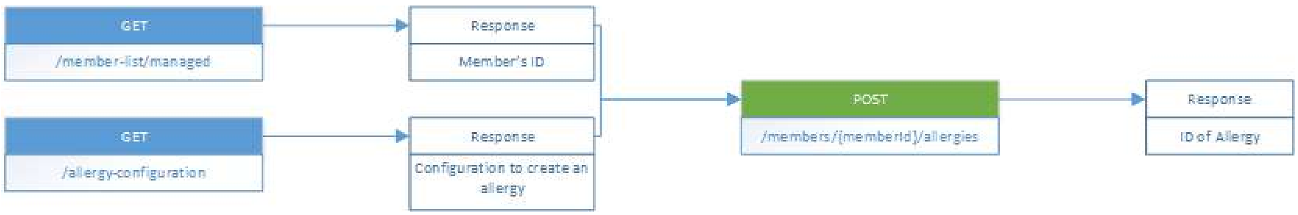
Create an allergy for a member

You may need to create an allergy for a member if the member had developed an allergy since the previous health visit. You need specific information to use web services to create an allergy for a member.

To create an allergy for a member, you need the following information:

- Member ID
- Configuration to create an allergy

The following graphic shows how to use web services to create an allergy for a member.



1. Retrieve the member ID to be used to create an allergy.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the GET /configuration/allergy web service to retrieve the configuration to create an allergy.
4. Use the member ID, the allergy's information, and the POST /members/{memberId}/allergies web service to create an allergy for the member.

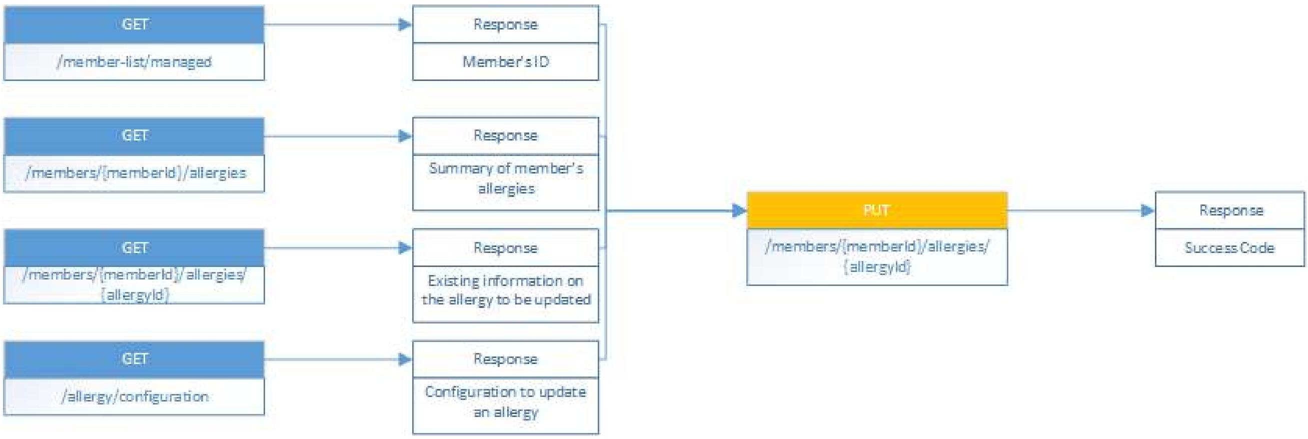
Update a member's allergy

You may need to update an allergy if a member's reaction has changed or the severity of their reaction has changed. You need specific information to use the web services to update a member's allergy.

To update the member's allergy, you need the following information:

- Member ID
- Allergy ID
- Details on the allergy that is to be updated
- Configuration to update the allergy

The following graphic shows how to use web services to update a member's allergy.



1. Retrieve the member ID to be used to retrieve and update the allergy.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/allergies web service to retrieve the summary of the member's allergies.
4. Store the ID of the allergy.
5. Use the member ID, the allergy ID, and the GET /members/{memberId}/allergies/{allergyId} web service to retrieve the details on the allergy.
6. Use the GET /configuration/allergy web service to retrieve the configuration to update the allergy.
7. Use the member ID, the allergy ID, the updated allergy information, and the PUT /members/{member Id}/allergies/{allergyId} web service to update the allergy.

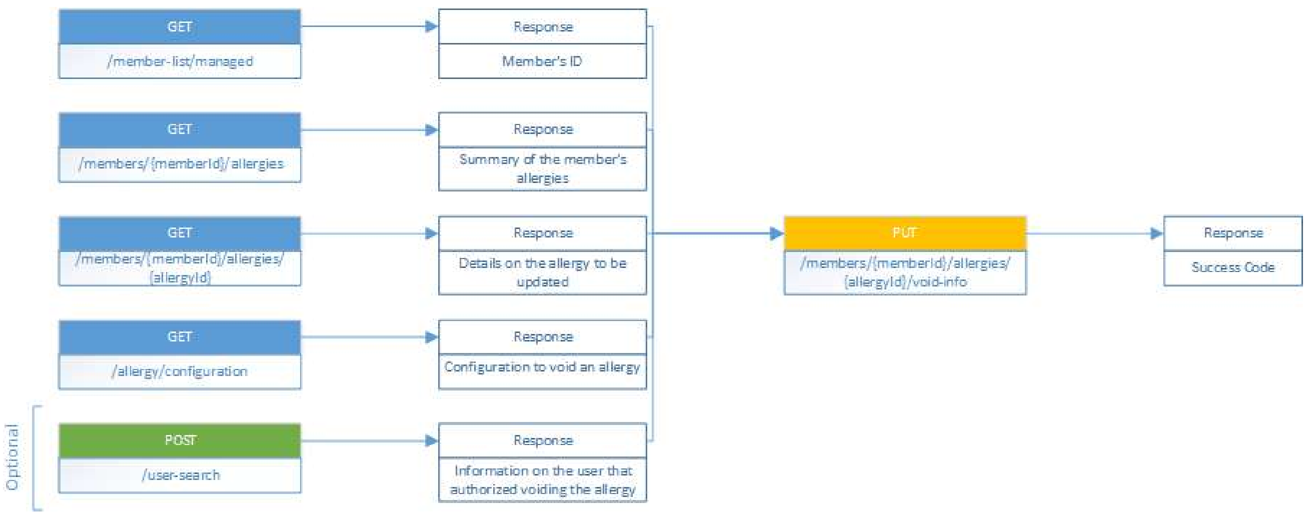
Void a member's allergy

You may need to void a member's allergy if it was recorded in error. You need specific information to use the web services to void a member's allergy.

To void a member's allergy, you need the following information:

- Member ID
- Allergy ID
- Details on the allergy
- Configuration to void the allergy
- Information on who authorized voiding the allergy (optional)

The following graphic shows how to use web services to void a member's allergy.



1. Retrieve the member ID to be used to retrieve and void the allergy.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/allergies to retrieve a summary of the member's allergies.
4. Use the member ID, the allergy ID, and the GET /members/{memberId}/allergies/{allergyId} web service to retrieve the details on the allergy.
5. Use the GET /configuration/allergy web service to retrieve the configuration to void the allergy.
6. (Optional) Use the POST /user-search web service to search for the user who authorized voiding the allergy.

   This is only necessary if you did not authorize voiding the allergy.
7. Use the member ID, the allergy ID, the void information, (the user who authorized voiding the allergy, if necessary,) and the PUT /members/{memberId}/allergies/{allergyId}/void-info web service to void the allergy.

Appeals

You can use web services to interact with a member's appeals.

The following sections describe how to use web services to interact with a member's appeals. For example, you can use web services to create an appeal, get an attachment on an appeal, and to create an attachment on an appeal.

Topics in this section

Get appeal details [27]

You may need to retrieve a member's appeal to review it with the member to ensure the record is accurate. You need specific information to use the web services to retrieve the details on a member's appeal.

Create an appeal [28]

You may need to create an appeal after reviewing an authorization with the member. You need specific information to use the web services to create an appeal for a member.

Update an appeal [29]

You may need to update an appeal on an authorization after reviewing the appeal and the authorization with the member. You need specific information to use the web services to update a member's appeal.

Void a member's appeal [30]

You may need to void an appeal if it was recorded in error. You need specific information to use the web services to void a member's appeal.

Get the attachment on an appeal [30]

You may need to review an attachment on an appeal with the member. You need specific information to use the web services to retrieve the attachments on a member's appeal.

Create an attachment on an appeal [31]

You may need to create or add an attachment to an appeal. You need specific information to use the web services to create an attachment on a member's appeal.

Get the notes on an appeal [32]

You may need to get the notes on an appeal to review them with a member. You need specific information to use the web services to retrieve the notes on a member's appeal.

Create a note on an appeal [33]

You may need to create a note on an appeal after reviewing the appeal with the member. You need specific information to use the web services to create a note on an appeal.

Get the review's details on an appeal [34]

You may need to retrieve the reviews on an appeal to discuss the results with the member. You needs specific information to use the web services to retrieve the details on an appeal's review.

Get the tasks on an appeal [35]

You may need to get the tasks on an appeal so they can complete any associated tasks. You need specific information to use the web services to retrieve the tasks on a member's appeal.

Create a task on an appeal [36]

You may need to create a task on an appeal after discussing the appeal with the member. You need specific information to use the web services to create a task for an appeal.

Complete a task on an appeal [37]

You can complete a task when reviewing an appeal with the member. You need specific information to use the web services to complete a task on an appeal.

Get the configuration of the BHP node [38]

This service retrieves the configuration for creating an appeal based on the BHP node.

Get the configuration of the Appeal Type and BHP node [39]

This service retrieves the configuration for creating an appeal based on the combination of the BHP node and Appeal Type.

Get a list of all configurable appeal fields [39]

You can retrieve a list of all the configurable fields for an appeal. You do not need any specific information do retrieve the list.

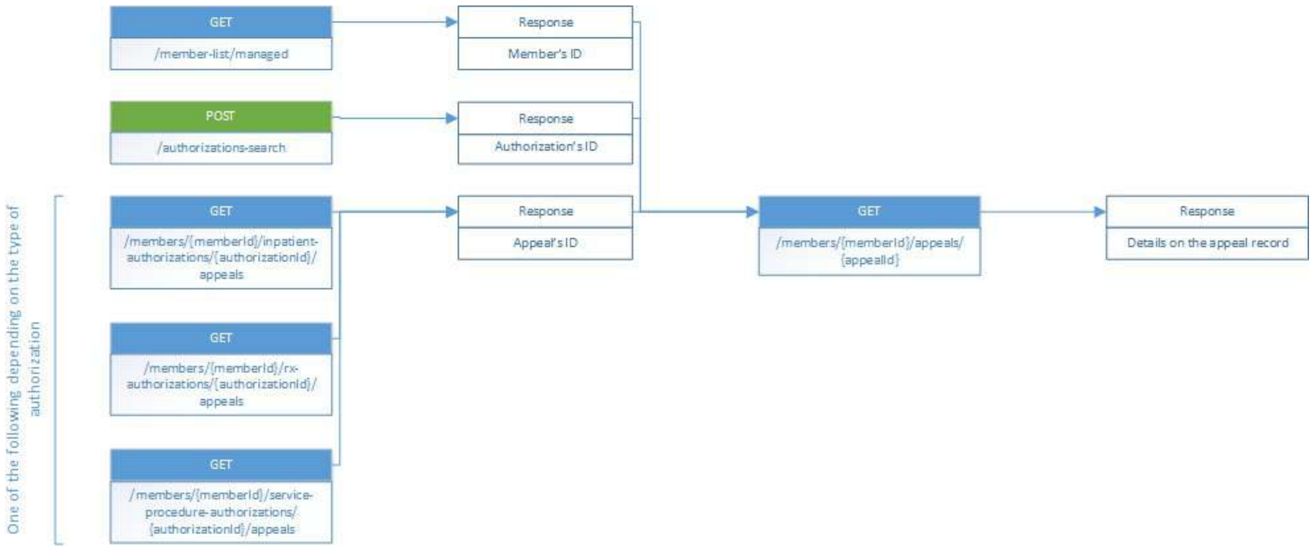
Get appeal details

You may need to retrieve a member's appeal to review it with the member to ensure the record is accurate. You need specific information to use the web services to retrieve the details on a member's appeal.

To retrieve the details on the appeals, you need the following information:

- Member ID
- ID of the associated authorization
- Appeal ID

The following graphic shows how to use web services to retrieve the details on an appeal.



1. Retrieve the member ID to be used to retrieve the appeal.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that has the appeal information.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Using the resulting authorization ID, the member ID, and one of the following web services depending on the type of authorization, retrieve the list of appeals associated with the authorization.
   - GET /members/{memberId}/inpatient-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/rx-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/service-procedure-authorizations/{authorization Id}/appeals
6. Store the ID of the appeal you want to view in detail.
7. Use the member ID, the appeal ID, and the GET /members/{memberId}/appeals/{appealId} web service to retrieve the details on the appeal.

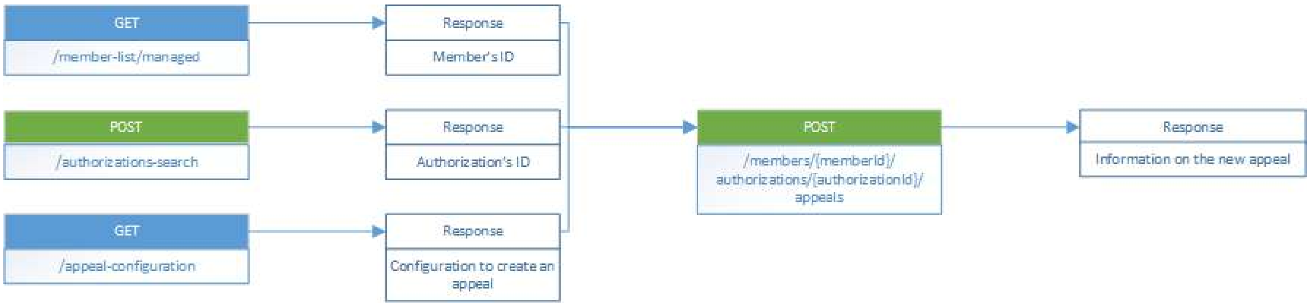
Create an appeal

You may need to create an appeal after reviewing an authorization with the member. You need specific information to use the web services to create an appeal for a member.

To create an appeal, you need the following information:

- Member ID
- Authorization ID
- Configuration to create an appeal

The following graphic shows how to use web services to create an appeal.



1. Retrieve the member ID to be used to create the appeal.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that has the appeal information.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Retrieve the configurations to create an appeal using the following web services.
   - GET /appeal-configuration
   - GET /appeal-configuration/appeal-type-bhp-node-configuration
   - GET /appeal-configuration/appeal-bhp-node-configuration
6. Use the member ID, the authorization ID, the appeal configuration information, and the POST / members/{memberId}/authorizations/{authorizationId}/appeals web service to create an appeal for the authorization.

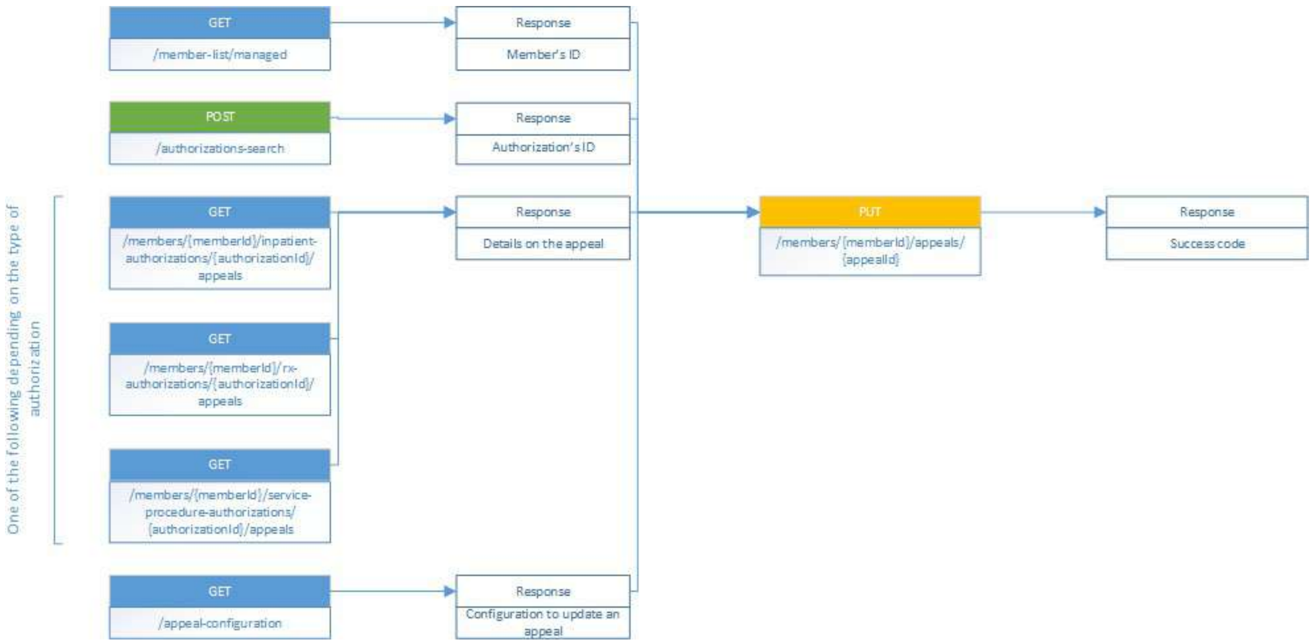
Update an appeal

You may need to update an appeal on an authorization after reviewing the appeal and the authorization with the member. You need specific information to use the web services to update a member's appeal.

To update an appeal, you need the following information:

- Member ID
- Authorization ID
- Appeal ID
- Configuration to update an appeal

The following graphic shows how to use web services to update a member's appeal.



1. Retrieve the member ID to be used to retrieve and update the appeal.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that has the appeal information.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Using the resulting authorization ID, the member ID, and one of the following web services, retrieve the list of appeals associated with the authorization.
   - GET /members/{memberId}/inpatient-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/rx-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/service-procedure-authorizations/{authorization Id}/appeals
6. Store the ID of the appeal.
7. Use the following web services to return the configuration to update an appeal:
   - GET /appeal-configuration
   - GET /appeal-configuration/appeal-type-bhp-node-configuration
   - GET /appeal-configuration/appeal-bhp-node-configuration
8. Use the appeal ID, the member ID, the updated appeal information, and the PUT / members/{member Id}/appeals/{appealId} web service to update the appeal.

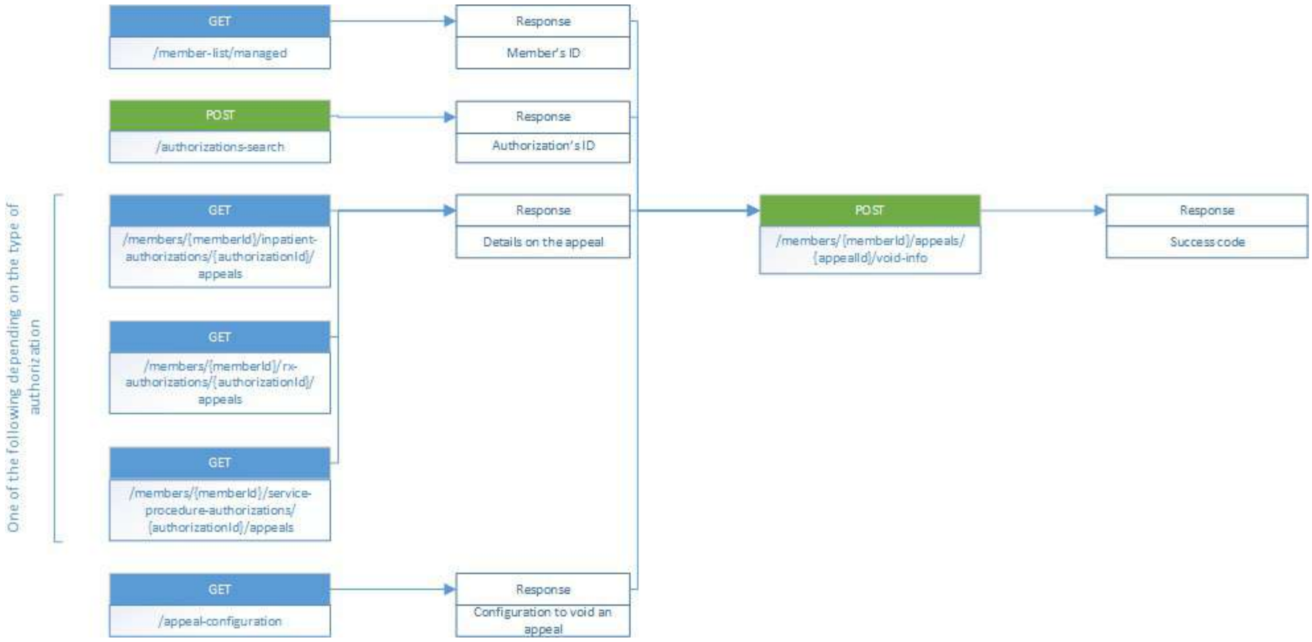
Void a member's appeal

You may need to void an appeal if it was recorded in error. You need specific information to use the web services to void a member's appeal.

To void an appeal, you need the following information:

- Member ID
- ID of the associated authorization
- ID of the appeal to be voided
- Configuration to void the appeal

The following graphic shows how to use web services to void a member's appeal.



1. Retrieve the member ID to be used to retrieve and void the appeal.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that has the appeal information.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Using the resulting authorization ID, the member ID, and one of the following web services, retrieve the list of appeals associated with the authorization.
   - GET /members/{memberId}/inpatient-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/rx-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/service-procedure-authorizations/{authorization Id}/appeals
6. Store the ID of the appeal.
7. Use the GET /appeal-configuration web service to return the configuration to void an appeal.
8. Use the appeal ID, the member ID, the void information, and the POST /members/{memberId}/ appeals/{appealId}/void-info web service to void the appeal.

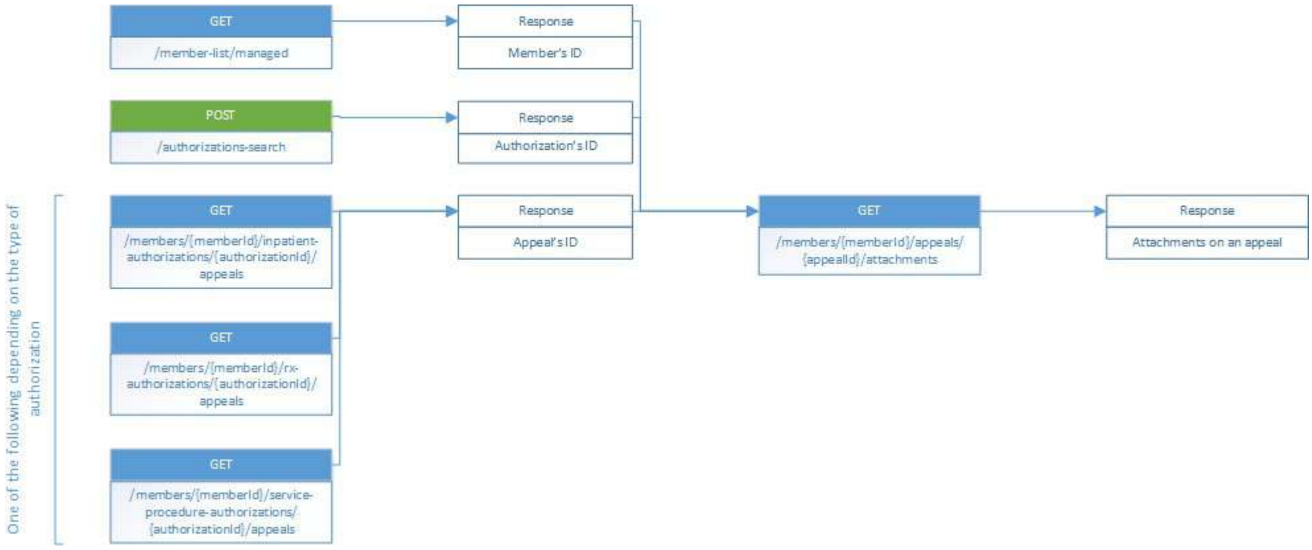
Get the attachment on an appeal

You may need to review an attachment on an appeal with the member. You need specific information to use the web services to retrieve the attachments on a member's appeal.

To get the attachment on an appeal, you need the following information:

- Member ID
- ID of the associated authorization
- Appeal ID

The following graphic shows how to use web services to retrieve the attachments on a member's appeal.



1. Retrieve the member ID to be used to retrieve the appeal.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that has the appeal information.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Using the authorization ID, the member ID, and one of the following web services, retrieve the list of appeals associated with the authorization.
   - GET /members/{memberId}/inpatient-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/rx-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/service-procedure-authorizations/{authorization Id}/appeals
6. Store the ID of the appeal.
7. Use the member ID, the appeal ID, and the GET /members/{memberId}/appeals/{appealId}/attachments web service to retrieve the attachments on the appeal.

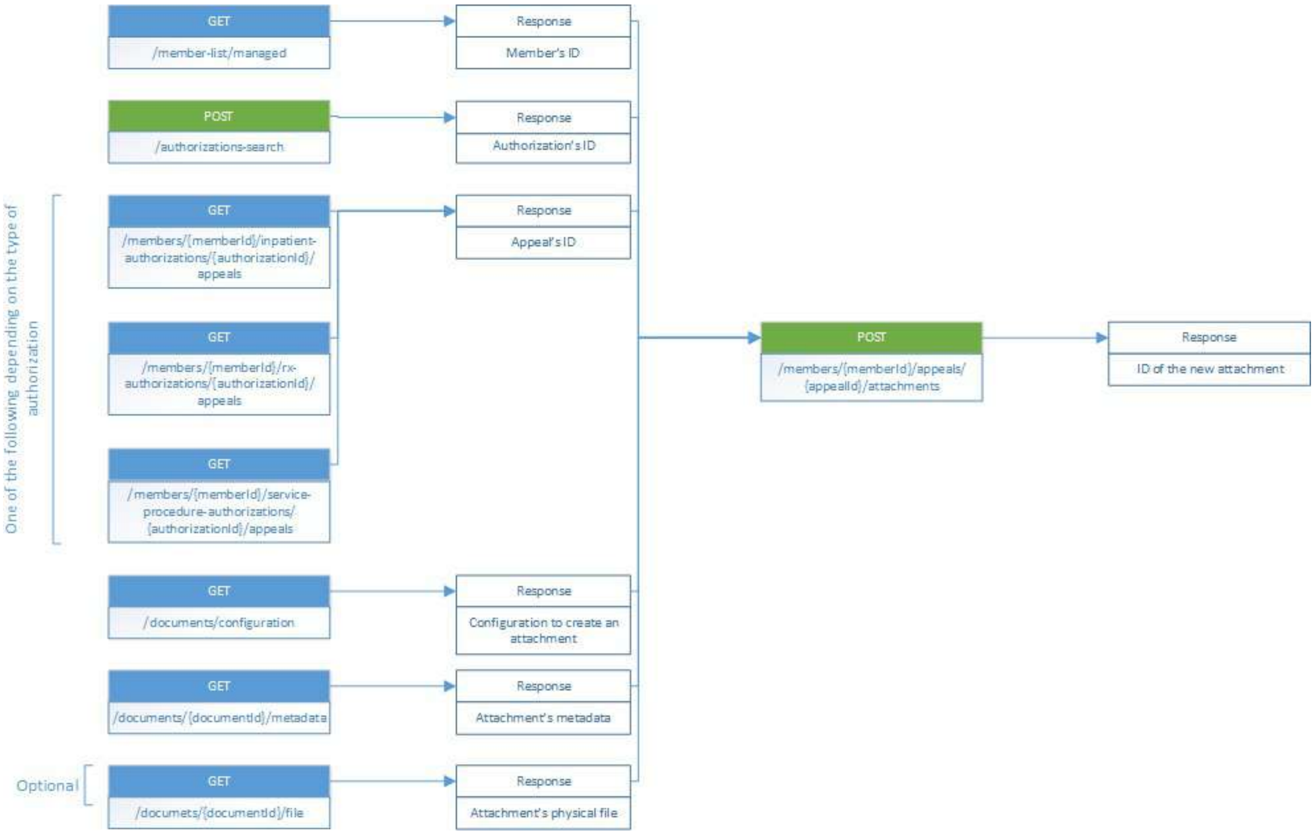
Create an attachment on an appeal

You may need to create or add an attachment to an appeal. You need specific information to use the web services to create an attachment on a member's appeal.

To create an attachment, you need the following information:

- Member ID
- ID of the associated authorization
- ID of the appeal that needs the attachment
- Configuration to create an attachment
- Attachment metadata
- Attachment's physical file (optional)

The following graphic shows how to use web services to create an attachment on a member's appeal.



1. Retrieve the member ID to be used to retrieve the appeal.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that has the appeal information.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization that has the appeal that needs to be updated.
5. Using the resulting authorization ID, the member ID, and one of the following web services, retrieve the list of appeals associated with the authorization.
   - GET /members/{memberId}/inpatient-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/rx-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/service-procedure-authorizations/{authorization Id}/appeals
6. Store the ID of the appeal that is to be updated.
7. Retrieve the configuration to create an attachment using the GET /documents/configuration web service.
8. Use the GET /documents/{documentId}/metadata web service to retrieve the metadata of the attachment.
9. (Optional) If attaching a physical file (versus a URL), use the GET /documents/{documentId}/file

   web service to retrieve the physical file to attach to the appeal.
10. Use the member ID, the appeal ID, the configuration to create an attachment, and the POST /members/

{memberId}/appeals/{appealId}/attachments web service to create an attachment on an appeal.

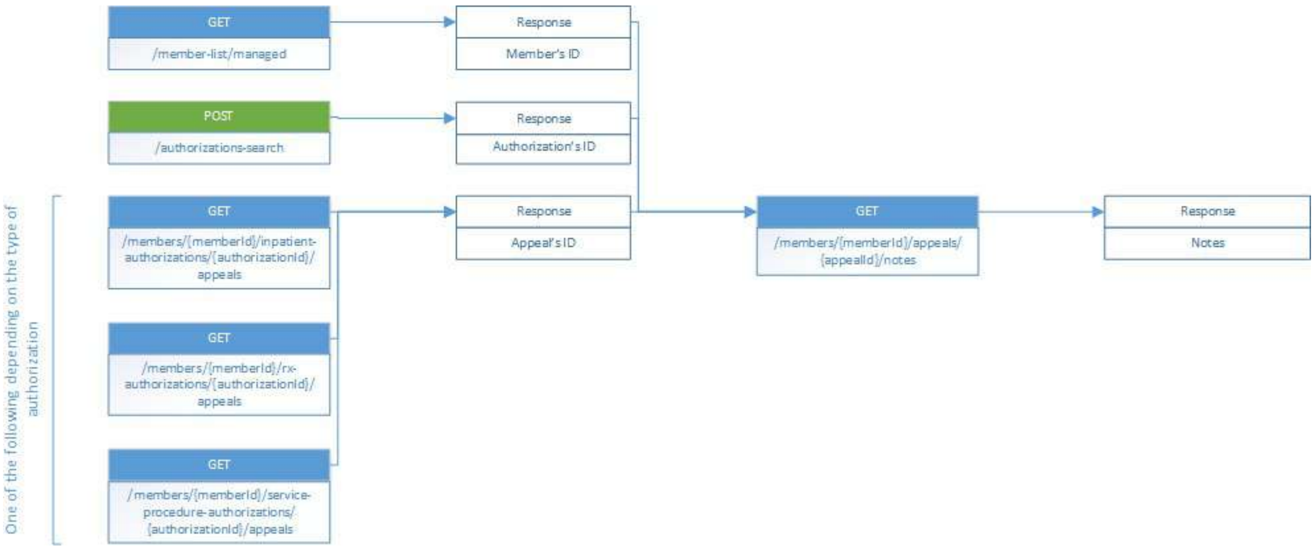
Get the notes on an appeal

You may need to get the notes on an appeal to review them with a member. You need specific information to use the web services to retrieve the notes on a member's appeal.

To get the notes on an appeal, you need the following information:

- Member ID
- ID of the associated authorization
- ID of the appeal

The following graphic shows how to use web services to retrieve the notes on a member's appeal.



1. Retrieve the member ID to be used to retrieve the appeal.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that has the appeal information.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Using the authorization ID, the member ID, and one of the following web services, retrieve the list of appeals associated with the authorization.
   - GET /members/{memberId}/inpatient-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/rx-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/service-procedure-authorizations/{authorization Id}/appeals
6. Store the ID of the appeal.
7. Use the member ID, the appeal ID, and the GET /members/{memberId}/appeals/{appealId}/notes web service to retrieve the notes on the appeal.

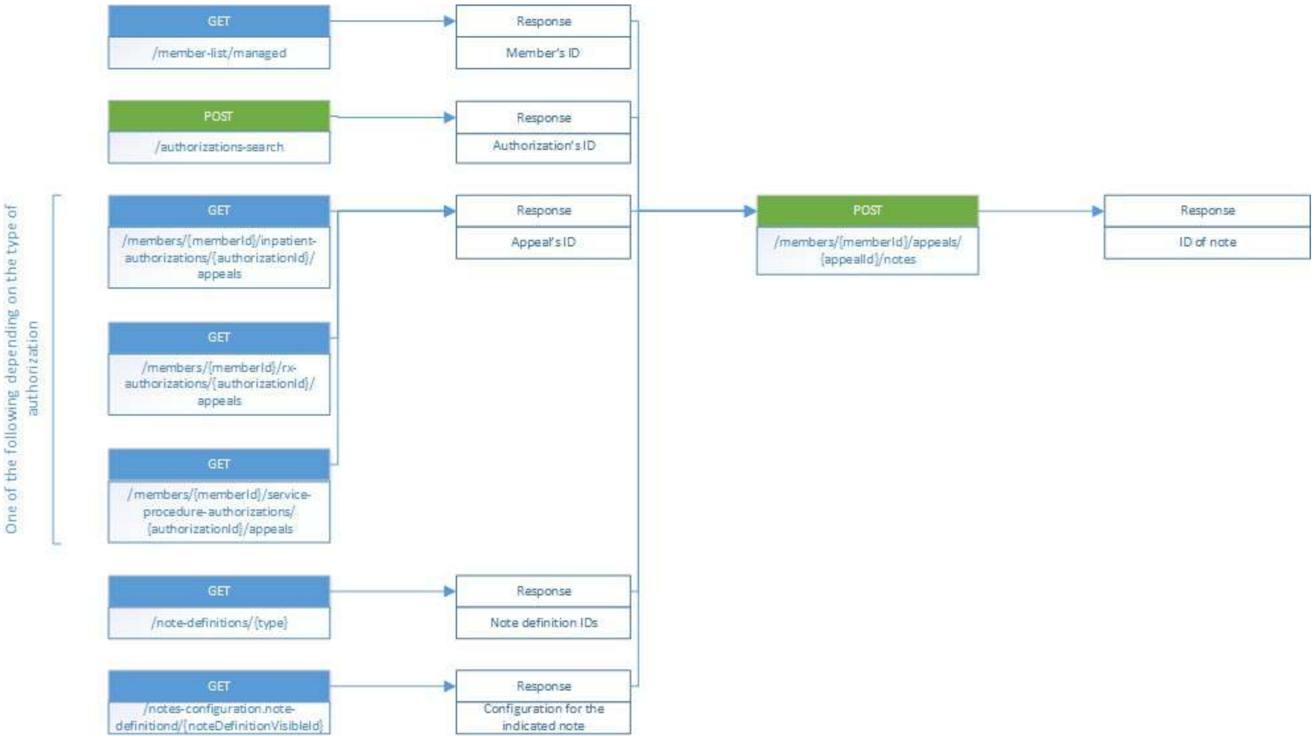
Create a note on an appeal

You may need to create a note on an appeal after reviewing the appeal with the member. You need specific information to use the web services to create a note on an appeal.

To create a note on an appeal, you need the following information:

- Member ID
- ID of the associated authorization
- ID of the appeal that needs the note
- Definition of the note based on the type of note to be created
- Configuration to create the note

The following graphic shows how to use web services to create a note on a member's appeal.



1. Retrieve the member ID to be used to retrieve and update the appeal.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that has the appeal information.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Using the authorization ID, the member ID, and one of the following web services, retrieve the list of appeals associated with the authorization.
   - GET /members/{memberId}/inpatient-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/rx-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/service-procedure-authorizations/{authorization Id}/appeals
6. Store the ID of the appeal.
7. Use the GET /note-definitions/{type} web service to retrieve the definition of the note to be created.
8. Store the ID of the type of note to be created.
9. Use the ID of the type of note to be created and the GET /notes-configuration/note-definition/{noteDefinitionVisibleId} web service to retrieve the configuration to create the note.
10. Use the member ID, the appeal ID, the note's information, and the POST /members/{memberId}/ appeals/{appealId}/notes web service to create the note.

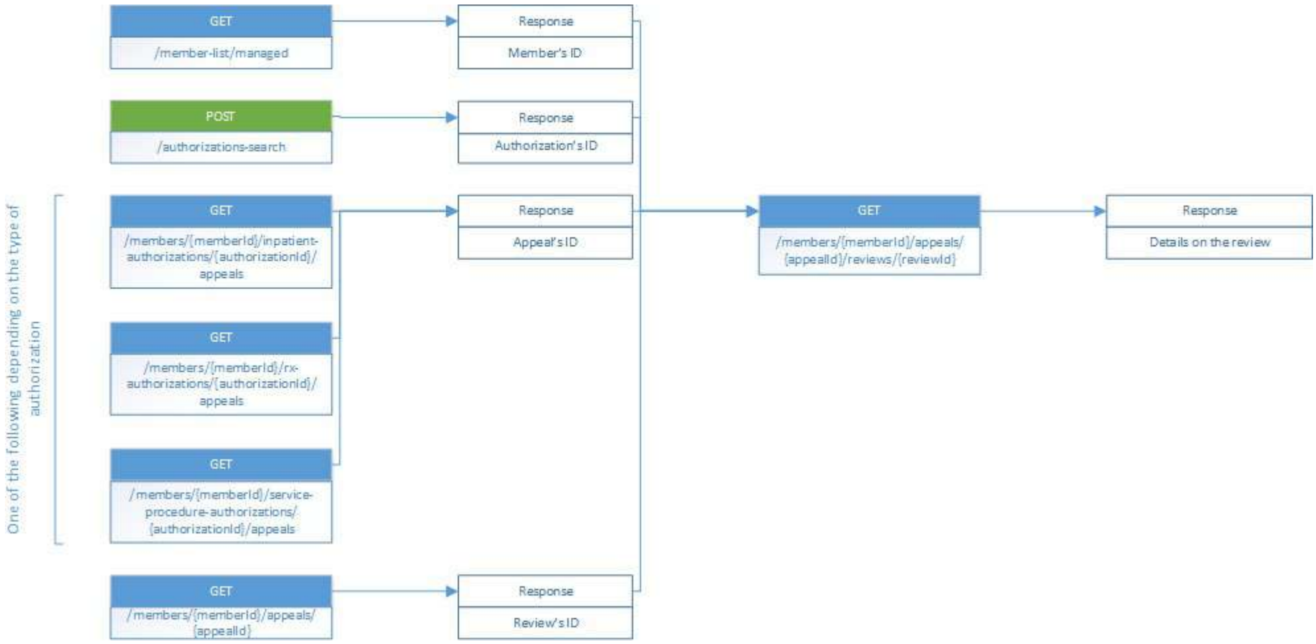
Get the review's details on an appeal

You may need to retrieve the reviews on an appeal to discuss the results with the member. You needs specific information to use the web services to retrieve the details on an appeal's review.

To get the reviews on an appeal, you need the following information:

- Member ID
- Authorization ID
- Appeal ID
- Review ID

The following graphic shows how to use web services to retrieve the review's details.



1. Retrieve the member ID to be used to retrieve the appeal.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that has the appeal information.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Using the authorization ID, the member ID, and one of the following web services, retrieve the list of appeals associated with the authorization.
   - GET /members/{memberId}/inpatient-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/rx-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/service-procedure-authorizations/{authorization Id}/appeals
6. Store the appeal ID.
7. Use the member ID, the appeal ID, and the GET /members/{memberId}/appeals/{appealId} to retrieve the ID of the review that is to be viewed in detail.
8. Store the review ID.
9. Use the member ID, the appeal ID, the review ID, and the GET /members/{memberId}/ appeals/

{appealId}/reviews/{reviewId} web service to retrieve the details on the review.

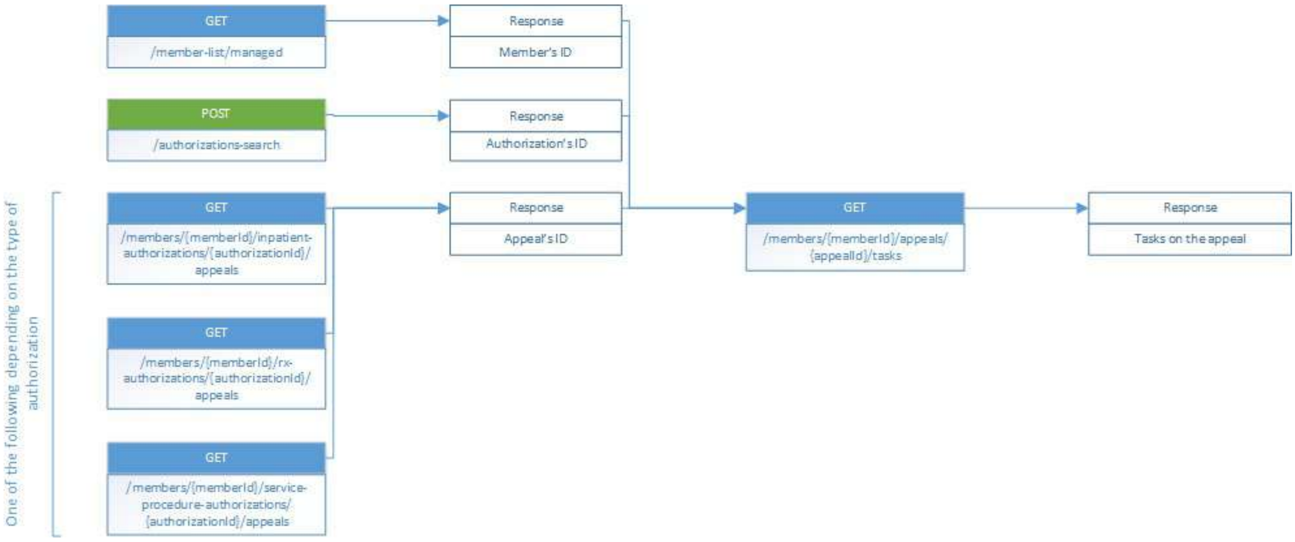
Get the tasks on an appeal

You may need to get the tasks on an appeal so they can complete any associated tasks. You need specific information to use the web services to retrieve the tasks on a member's appeal.

To get the tasks on an appeal, you need the following information:

- Member ID
- Authorization ID
- Appeal ID

The following graphic shows how to use web services to retrieve the tasks on an appeal.



1. Retrieve the member ID to be used to retrieve the appeal.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that has the appeal information.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Using the resulting authorization ID, the member ID, and one of the following web services, retrieve the list of appeals associated with the authorization.
   - GET /members/{memberId}/inpatient-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/rx-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/service-procedure-authorizations/{authorization Id}/appeals
6. Store the appeal ID.
7. Use the member ID, the appeal ID, and the GET /members/{memberId}/appeals/{appealId}/tasks web service to get the tasks on the appeal.

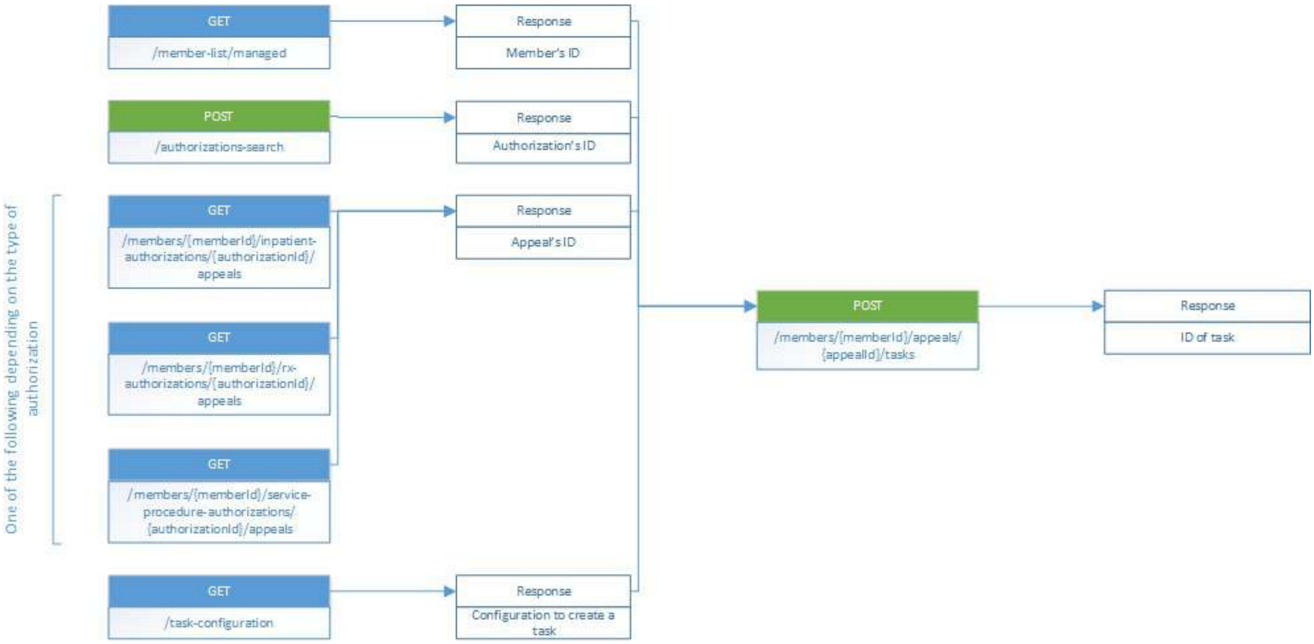
Create a task on an appeal

You may need to create a task on an appeal after discussing the appeal with the member. You need specific information to use the web services to create a task for an appeal.

To create the task on the appeal, you need the following information:

- Member ID
- Authorization ID
- Appeal ID
- Configuration to create the task

The following graphic shows how to use web services to create a task on a member's appeal.



1. Retrieve the member ID to be used to retrieve the appeal.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that has the appeal information.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Using the resulting authorization ID, the member ID, and one of the following web services, retrieve the list of appeals associated with the authorization.
   - GET /members/{memberId}/inpatient-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/rx-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/service-procedure-authorizations/{authorization Id}/appeals
6. Store the appeal ID.
7. Use the GET /task-configuration web service to retrieve the configuration to create a task.
8. Use the member ID, the appeal ID, the task's information, and the POST /members/{memberId}/ appeals/{appealId}/tasks web service to create a task on the appeal.

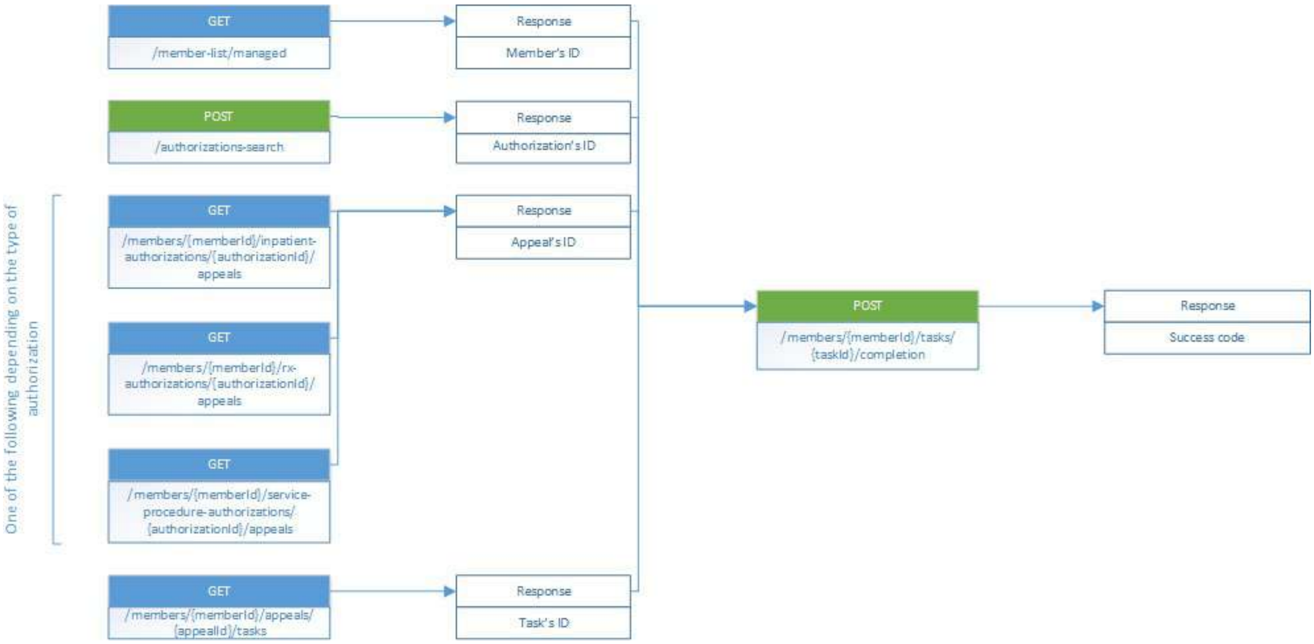
Complete a task on an appeal

You can complete a task when reviewing an appeal with the member. You need specific information to use the web services to complete a task on an appeal.

To complete a task on an appeal, you need the following information:

- Member ID
- Authorization ID
- Appeal ID
- Task ID

The following graphic shows how to use web services to complete a task on a member's appeal.



1. Retrieve the member ID to be used to retrieve the appeal.

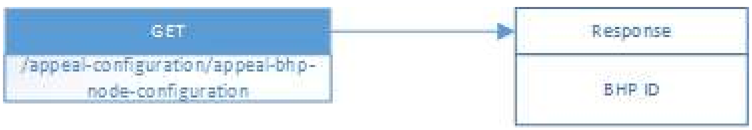
   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.
3. Search for the authorization that has the appeal information.

   Refer to Search for a member's authorization [75] for more information.
4. Store the authorization ID.
5. Using the resulting authorization ID, the member ID, and one of the following web services, retrieve the list of appeals associated with the authorization.
   - GET /members/{memberId}/inpatient-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/rx-authorizations/{authorizationId}/appeals
   - GET /members/{memberId}/service-procedure-authorizations/{authorization Id}/appeals
6. Store the ID of the appeal.
7. Use the member ID, the appeal ID, and the GET /members/{memberId}/appeals/{appealId}/tasks web service to get the IDs of the associated tasks.
8. Store the ID of the task.
9. Use the member ID, the task ID, and the POST /members/{memberId}/tasks/{taskId}/completion web service to complete the task.

Get the configuration of the BHP node

This service retrieves the configuration for creating an appeal based on the BHP node. To get the BHP node configuration on an appeals, you need the BHP ID information.

The following graphic shows how to use web services to retrieve the BHP node configuration on an appeal.



1. Retrieve the BHP ID to be used to retrieve the configuration.
2. Store the BHP ID.
3. Use the BHD ID and the GET /appeal-bhp-node-configuration?bhpNodeFeedIdFullPath=

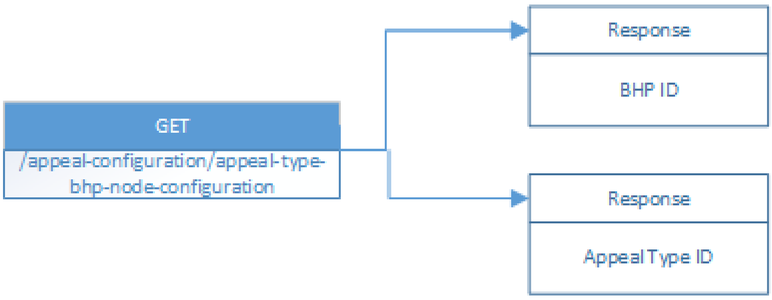
{BHPID} web service to retrieve the BHP node configuration on the appeal.

Get the configuration of the Appeal Type and BHP node

This service retrieves the configuration for creating an appeal based on the combination of the BHP node and Appeal Type.

To get the BHP node and Appeal Type configuration on an appeal, you need the BHP ID and Appeal Type ID information.

The following graphic shows how to use web services to retrieve the BHP node and Appeal Type configuration on an appeal.



1. Retrieve the BHP ID and Appeal Type ID to be used to retrieve the configuration.
2. Store the BHP ID.
3. Store the Appeal Type ID.
4. Use both the BHP ID and Appeal Type ID in the GET /appeal-type-bhp-node-configuration?bhpNodeFeedIdFullPath={BHPID}&appealType={AppealTypeID} web service to retrieve the BHP node configuration on the appeal.

Get a list of all configurable appeal fields

You can retrieve a list of all the configurable fields for an appeal. You do not need any specific information do retrieve the list.

To retrieve the list of configurable fields, you do not need any specific information.

1. Retrieve the appeal configurations.
2. Retrieve the list of all the configurable fields for the configurations using GET /appeal-configuration/appeal-configuration-fields.

Appeals and grievances (AAG)

You can use web service to work with member's appeals and grievances (AAG).

The following describes how to use web services to interact with a member's AAGs. For example, you can use web services to get the types of AAGs, to get the configuration for AAG, and to create an AAG.

Topics in this section

You may need to retrieve the types of AAGs available for a member. You need specific information to use the web services to get the AAG types available for a member.

You may need to retrieve the configuration for an AAG type that is available for a member. You need specific information to use web services to retrieve the configuration for an AAG type.

Search the member's AAG [41]

You may need to search for a specific AAG associated with a member. This is especially helpful when a member has several AAGs. You need specific information to use the web services to search for a member's AAG.

Get the details on a member's AAG [42]

You may need retrieve the details on a member's AAG so they can review the record with the member. You need specific information to use the web services to retrieve the details on a member's AAG.

Get the details on an AAG review [42]

You may need to retrieve the details on a review on an AAG. You need specific information to use the web services to retrieve the details on a member's AAG review.

Create an AAG [43]

After a discussion with the member, you may need to create an AAG for the member. You need specific information to use the web services to create an AAG for a member.

Create a note on an AAG [45]

You may need to create a note on an AAG after reviewing the AAG with the member. You need specific information to use the web services to create a note on a member's AAG.

Create an attachment on an AAG [46]

You may need to add or create an attachment on an AAG. You need specific information to use the web services to create an attachment on a member's AAG.

Create a task on an AAG [47]

You may need to create a task on an AAG after reviewing or creating an AAG for the member. You need specific information to use the web services to create a task on a member's AAG.

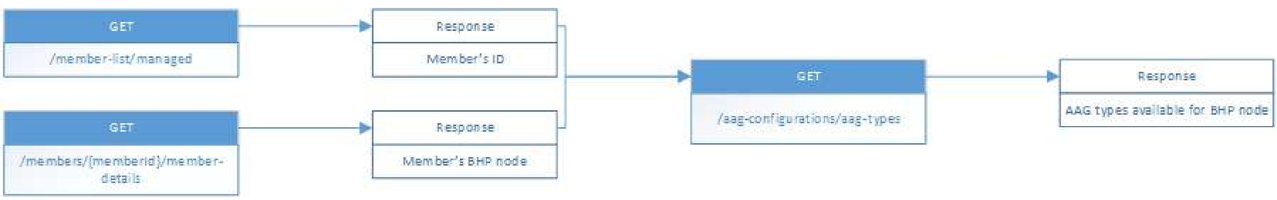
Get the AAG types for a member

You may need to retrieve the types of AAGs available for a member. You need specific information to use the web services to get the AAG types available for a member.

To get the AAG types for a member, you need the following information:

- Member ID
- Member's BHP node

The following graphic shows how to use web services to retrieve the AAG types available for a member.



1. Retrieve the member ID to be used to retrieve the AAG types.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/member-details web service to retrieve the member's BHP node.
4. Store the member's BHP node.
5. Use the member's BHP node and the GET /aag-configurations/aag-types web service to retrieve the AAG types available for the member.

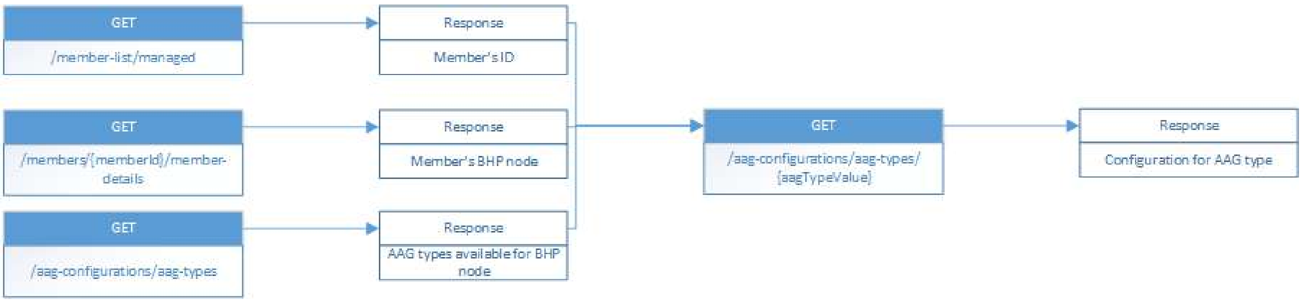
Get the configuration for an AAG type

You may need to retrieve the configuration for an AAG type that is available for a member. You need specific information to use web services to retrieve the configuration for an AAG type.

To get the configuration for the AAG type, you need the following information:

- Member ID
- Member's BHP node
- AAG type

The following graphic shows how to use web services to retrieve the configuration for an AAG type.



1. Retrieve the member ID to be used to retrieve the configuration.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/member-details web service to retrieve the member's BHP node.
4. Store the member's BHP node.
5. Use the member's BHP node and the GET /aag-configurations/aag-types web service to retrieve the AAG types available for the member.
6. Store the value for the type of AAG you want to view.
7. Use the member's BHP, the type of AAG, and the GET /aag-configurations/aag-types/{aag TypeValue} web service to retrieve the configuration for the AAG type.

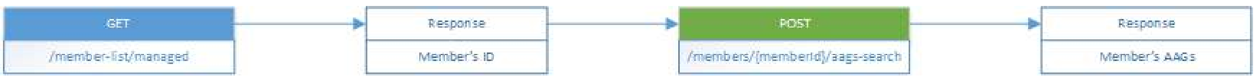
Search the member's AAG

You may need to search for a specific AAG associated with a member. This is especially helpful when a member has several AAGs. You need specific information to use the web services to search for a member's AAG.

To search for a member's AAG, you need the following information:

- Member ID

The following graphic shows how to use web services to search for a member's AAG.



1. Retrieve the member ID to be used to search for the AAG.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID, any search criteria, and the POST /members/{memberId}/aags-search web service to search the member's AAGs.

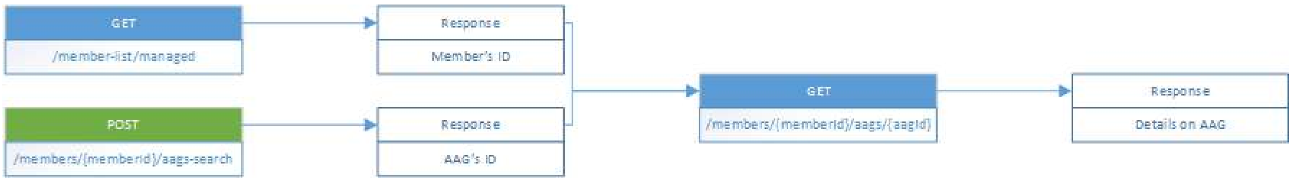
Get the details on a member's AAG

You may need retrieve the details on a member's AAG so they can review the record with the member. You need specific information to use the web services to retrieve the details on a member's AAG.

To get the details on an AAG, you need the following information:

- Member ID
- AAG ID

The following graphic shows how to use web services to retrieve the details on a member's AAG.



1. Retrieve the member ID to be used to retrieve the AAG.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the member AAG.

   Refer to Search the member's AAG [41] on page 60 for more information.
4. Store the ID of the AAG.
5. Using the member ID, the AAG ID, and the GET /members/{memberId}/aags/{aagId} web service, retrieve the details on the AAG you want to view in detail.

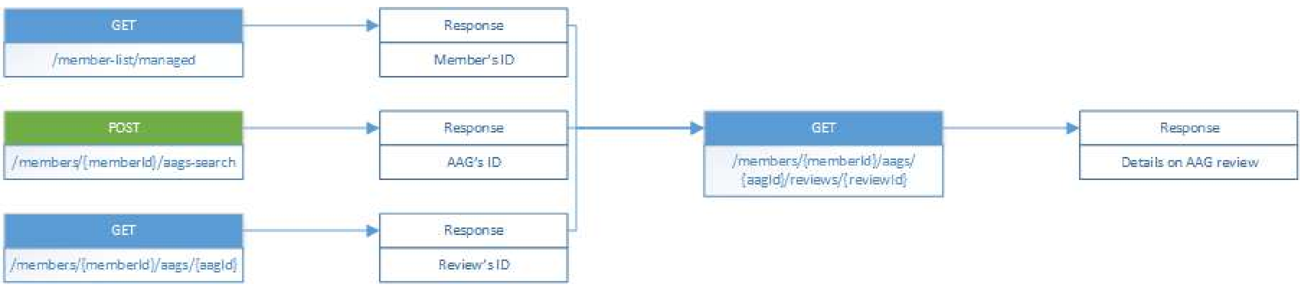
Get the details on an AAG review

You may need to retrieve the details on a review on an AAG. You need specific information to use the web services to retrieve the details on a member's AAG review.

To get the details on a review on an AAG, you need the following information:

- Member ID
- AAG ID
- Review ID

The following graphic shows how to use web services to retrieve the details on a review of a member's AAG.



1. Retrieve the member ID to be used to retrieve the AAG and the review.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the member AAG.

   Refer to Search the member's AAG [41] on page 60 for more information.

4. Store the ID of the AAG.
5. Use the AAG ID, the member ID, and the GET /members/{memberId}/aags/{aagId} web service to retrieve the details on the AAG, including any information for any associated reviewed.
6. Store the ID of the review.
7. Use the member ID, the AAG ID, the review ID, and the GET /members/{memberId}/aags/{aag Id}/reviews/{reviewId} web service to retrieve the details on the review.

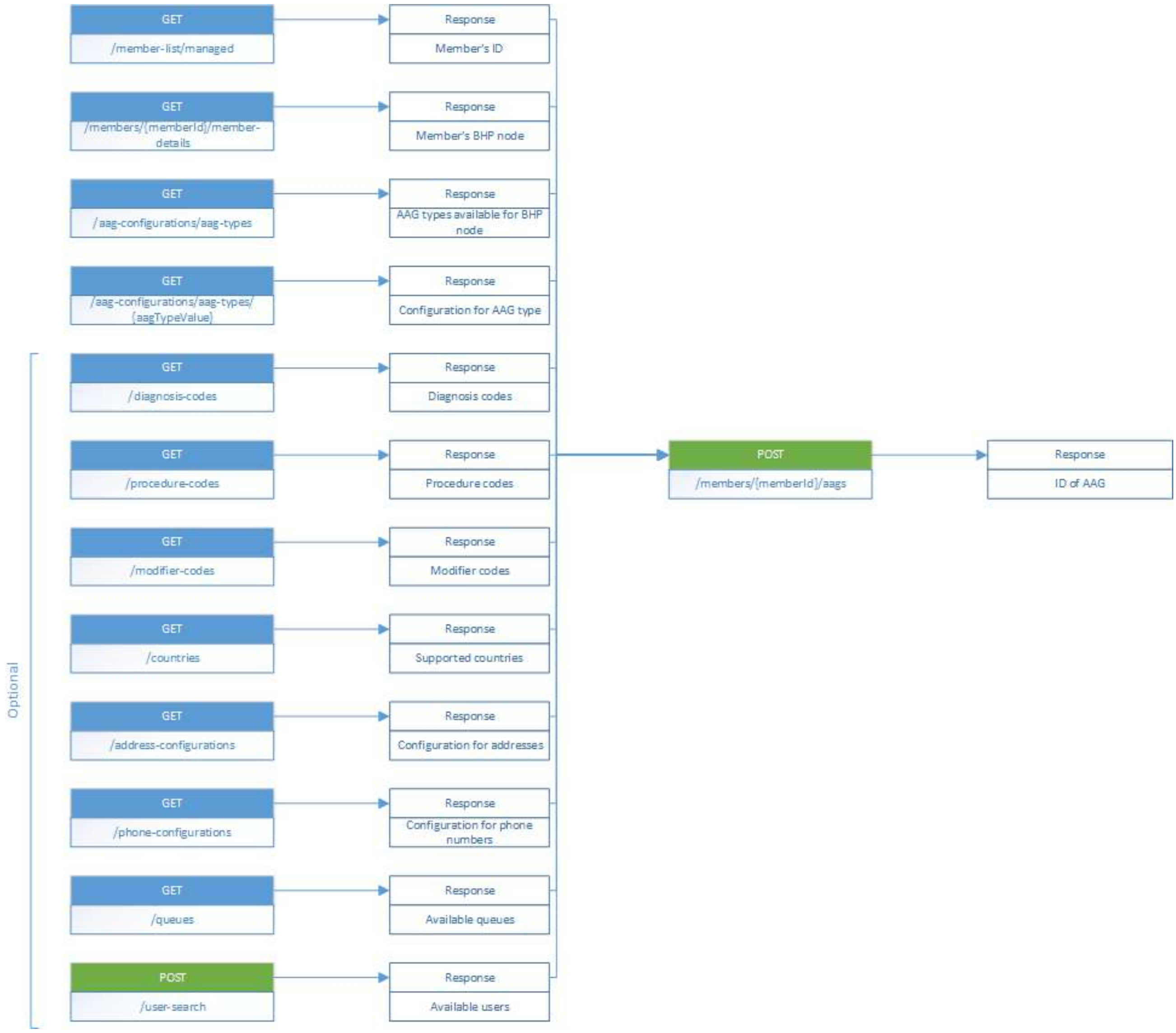
Create an AAG

After a discussion with the member, you may need to create an AAG for the member. You need specific information to use the web services to create an AAG for a member.

To create an AAG, you need the following information:

- Member ID
- Member's BHP node
- AAG type available for the member
- Configuration for the AAG type to be created
- Provider information (optional)
- Diagnosis codes (optional)
- Procedure codes (optional)
- Modifier codes (optional)
- Information on supported countries (optional)
- Configuration to create an address (optional)
- Configuration to create a phone number (optional)
- User name (optional)

The following graphic shows how to use web services to create an AAG for a member.



1. Retrieve the member ID to be used to create the AAG.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/member-details web service to retrieve the member's BHP node.
4. Use the member's BHP node and the GET /aag-configurations/aag-types web service to retrieve the AAG types that are available for the member.
5. Store the AAG type that is to be used for the member.
6. Use the AAG type, the member's BHP node, and the GET /aag-configurations/aag-types/{aag TypeValue} web service to retrieve the configuration.
7. (Optional) If changing the owner of the AAG, use the POST /users-search web service. Refer to Search for a user [297] on page 387 for more information on using the web service.
8. (Optional) If including the phone number, fax number, or address of the individual who requested the AAG, use the GET /countries web service to get the information on the supported countries.
9. (Optional) If including an address, use the GET /address-configurations web service and the country information, if applicable, to retrieve the configuration for addresses.
10. (Optional) If including phone numbers or fax numbers, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration for phone numbers.

11. (Optional) If including any provider information, use the POST /providers-search web service. Refer to Search for a provider [231] on page 301 for more information on using the web service.
12. (Optional) If including any procedure information on the AAG, use the GET /procedure-codes web service.
13. (Optional) If including any diagnosis information on the AAG, use the GET /diagnosis-codes web service.
14. (Optional) If including modifier codes on the AAG, use the GET /modifier-codes web service.
15. Use the member ID, the information to create the AAG, and the POST /members/{memberId}/aags

web service to create the AAG.

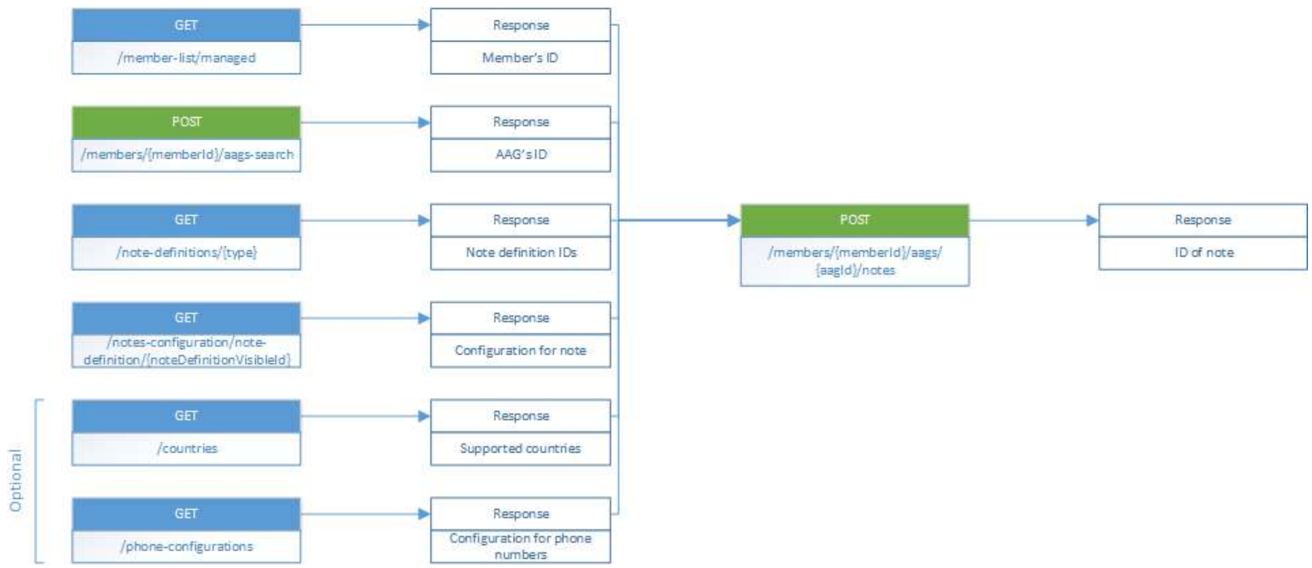
Create a note on an AAG

You may need to create a note on an AAG after reviewing the AAG with the member. You need specific information to use the web services to create a note on a member's AAG.

To create a note on an AAG, you need the following information:

- Member ID
- AAG ID
- ID of the note to be created
- Configuration for the note to be created
- Supported countries (optional)
- Configuration for phone numbers (optional)

The following graphic shows how to use web services to create a note on a member's AAG.



1. Retrieve the member ID to be used to retrieve and update the AAG.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the member's AAG.

   Refer to Search the member's AAG [41] on page 60 for more information.
4. Store the ID of the AAG.
5. Use the GET /note-definitions/{type} web service to retrieve the ID of the type of note that you want to create on the AAG.

6. Use the GET /notes-configuration/note-definition/{noteDefinitionVisibleId} web service to return the configuration for the type of note to be created.
7. (Optional) If including an international phone number information, use the GET /countries web service to retrieve the information on supported countries.
8. (Optional) If including phone numbers on the note, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration for phone numbers.
9. Use the member ID, the AAG ID, the note information, and the POST /members/{memberId}/aags/

{aagId}/notes web service to create a note on an AAG.

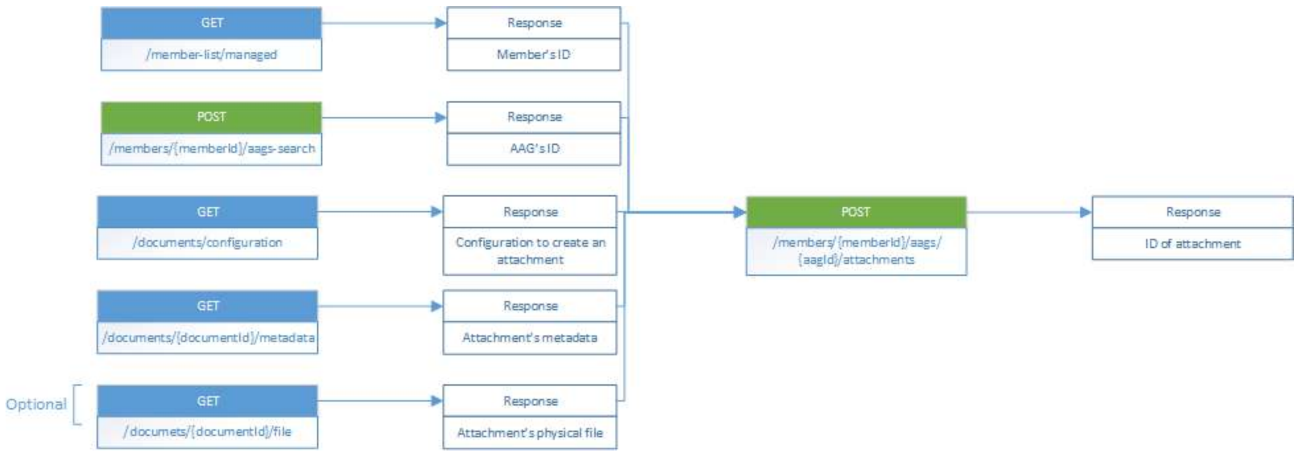
Create an attachment on an AAG

You may need to add or create an attachment on an AAG. You need specific information to use the web services to create an attachment on a member's AAG.

To create an attachment on an AAG, you need the following information:

- Member ID
- AAG ID
- Configuration to create an attachment
- Metadata of an attachment
- Physical file of an attachment (optional)

The following graphic shows how to use web services to create an attachment on a member's AAG.



1. Retrieve the member ID to be used to retrieve and update the AAG.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the member's AAG.

   Refer to Search the member's AAG [41] on page 60 for more information.
4. Store the ID of the AAG.
5. Use the GET /documents/configuration web service to retrieve the configuration for creating an attachment.
6. Use the GET /documents/{documentId}/metadata web service and the ID of the document to return the associated metadata.
7. (Optional) If attaching a physical file (versus a URL), use the document ID and the GET /documents/

   {documentId}/file to retrieve the physical file.

8. Use the member ID, the AAG ID, the attachment's information (including the metadata and the file, if applicable), and the POST /members/{memberId}/aags/{aagId}/attachments web service to create an attachment on the AAG.

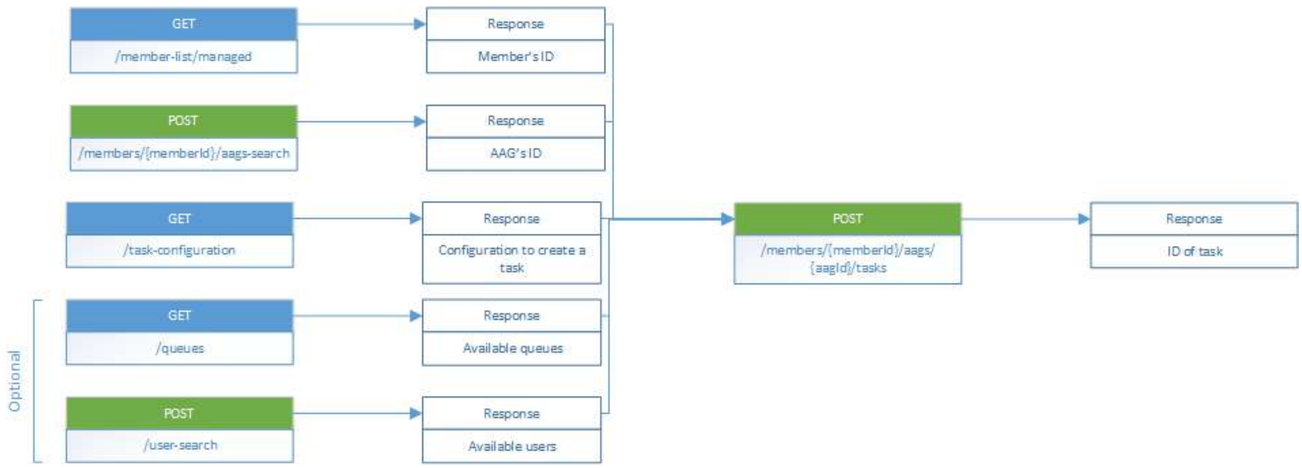
Create a task on an AAG

You may need to create a task on an AAG after reviewing or creating an AAG for the member. You need specific information to use the web services to create a task on a member's AAG.

To create a task on an AAG, you need the following information:

- Member ID
- AAG ID
- Configuration to create a task
- Name of the assignee (queue or user)

The following graphic shows how to use web services to create a task on a member's AAG.



1. Retrieve the member ID to be used to retrieve and update the AAG.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID, any search criteria, and the POST /members/{memberId}/aags-search web service to search the member's AAGs.
4. Store the ID of the AAG.
5. Use the GET /task-configuration web service to retrieve the configuration to create the task.
6. (Optional) If assigning the task to a different user or to a queue, use the POST /users-search web service or the GET /queues web service to find information on the appropriate assignee, respectively.

   Refer to Search for a user [297] on page 387 and Get information on the available queues [233] on page 304 for more information on how to use the web services.
7. Using the member ID, the AAG ID, the task information, and the POST /members/{memberId}/aags/

{aagId}/tasks web service, create the task on the AAG.

Appointments

You can use web services to interact with users' appointments.

The following describe how to use web services to interact with a user's appointments. For example, you can use web services to create an appointment for only a user and how to create an appointment for a user and a member.

Topics in this section

Search for appointments [48]

You may need to search for your own appointments or to search another user's appointments to determine availability. You need specific information to use the web services to search for an appointment.

Create an appointment for a user and a member [48]

You may need to create an appointment for yourself or another user and a member after meeting with the member. You need specific information to use the web services to create an appointment for a user and a member.

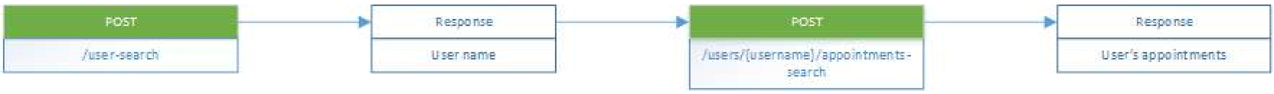
Search for appointments

You may need to search for your own appointments or to search another user's appointments to determine availability. You need specific information to use the web services to search for an appointment.

To search for appointments, you need the following information:

- User name

The following graphic shows how to use web services to search for a user's appointment.



1. Search for the user to use in the search for appointments.

   Refer to Search for a user [297] on page 387 for more information on using the web service.
2. Store the user name.
3. Use the user name, any additional search criteria, and the POST /users/{username}/appointments-search web service to search for the user's appointments.

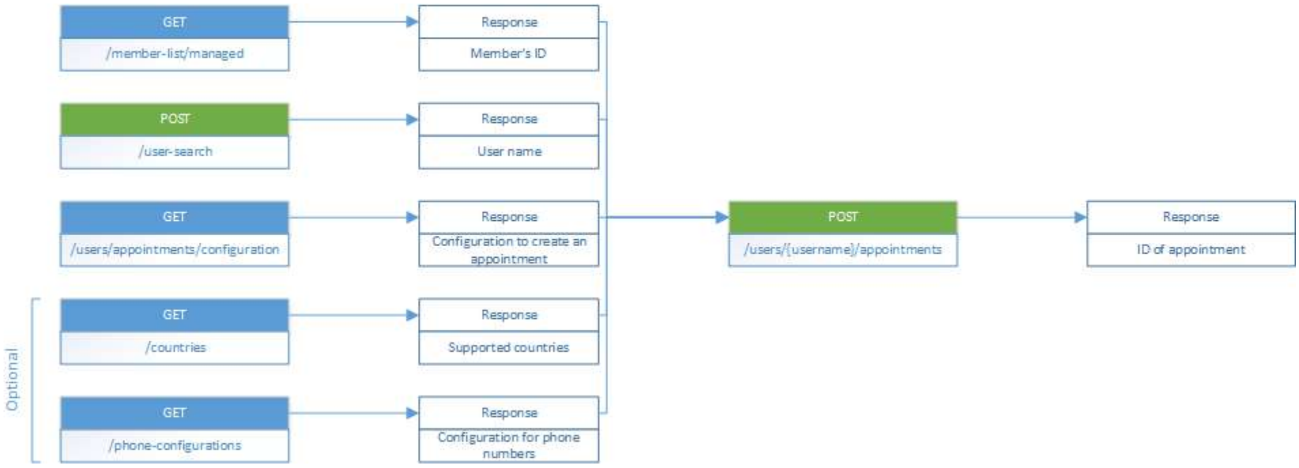
Create an appointment for a user and a member

You may need to create an appointment for yourself or another user and a member after meeting with the member. You need specific information to use the web services to create an appointment for a user and a member.

To create an appointment, you need the following information:

- Member ID
- User name
- Configuration to create the appointment
- Supported countries (optional)
- Configuration for phone numbers (optional)

The following graphic shows how to use web services to create an appointment for a user and a member.



1. Retrieve the member ID to be used to create an appointment for the member.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the user to use to create the appointment.

   Refer to Search for a user [297] on page 387 for more information on using the web service.
4. Get the configuration to create an appointment using the GET /users/appointment/configuration web service.
5. (Optional) If including phone information on the appointment, use the GET /countries web service and the GET /phone-configurations web service to retrieve the supported countries and the configuration for phone numbers.
6. Use the member ID, the user name, the appointment's information (optionally the phone number and country information), and the POST /users/{username}/appointments web service to create an appointment for a user and a member.

Assessment-metas

You can use web services to interact with assessment metadata.

The following sections describe how to use web services to interact with metadata. For example, you can use web services to retrieve question groups, questions within a question group, and any programs that may be configured to be triggered based on the answers to questions

Topics in this section

You need to retrieve the question groups on an assessment if you need to complete an assessment with a member. You need specific information to use the web services to retrieve the question groups on an assessment.

You may need to retrieve the questions in a question group when completing an assessment with a member. You need specific information to use the web services to retrieve the questions in an assessment's question group.

You may need to retrieve the programs that are associated with an assessment when completing an assessment with the member. You need specific information to use web services to retrieve the programs that can be created by the completion of an assessment.

You need to retrieve a new instance of an assessment of the type specified by the ID, and any configuration and metadata required to render and complete the assessment. Trying to access MCG assessment results in an error.

Get all questions in all question groups and their default answers [52]

You might need to retrieve all the questions in all the question groups in an assessment, as well as the default answers to the questions.

Get all questions and default answers by definition version [53]

You might need to retrieve all questions in all question groups in an assessment, as well as the default answers to the questions, filtered by definition version ID.

Create initial or general assessment leveraging latest saved answers [53]

Create an initial or general assessment using the sourceId in the request, for a member using their latest answers to the initial/general assessment questions for the assessmentMetaId in the request.

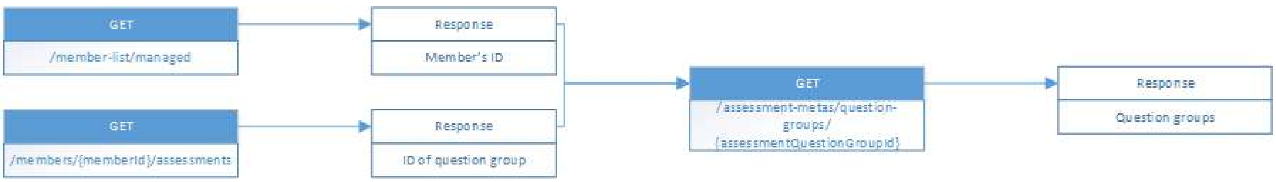
Get the question groups on an assessment

You need to retrieve the question groups on an assessment if you need to complete an assessment with a member. You need specific information to use the web services to retrieve the question groups on an assessment.

To get the question groups on an assessment, you need the following information:

- Member ID
- ID of the question group

The following graphic shows how to use web services to retrieve the question groups on an assessment.



1. Retrieve the member ID to be used to retrieve the assessment and the available question groups.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Retrieve the assessments available for the member using the member ID and the GET / members/

   {memberId}/assessments web service.
4. Store the ID of the question group.
5. Use the ID of the question group and the GET /assessment-metas/question-groups/

{assessmentQuestionGroupId} web service.

Get the questions in a question group

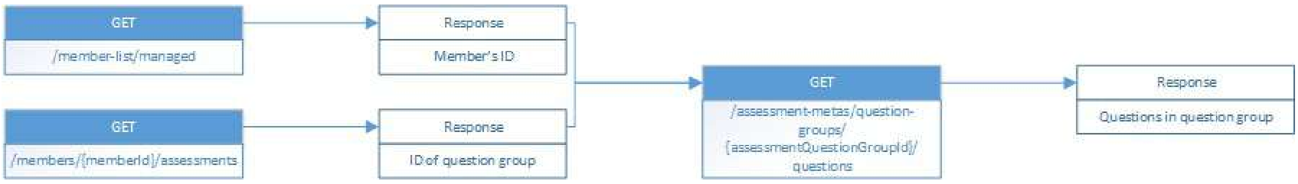
You may need to retrieve the questions in a question group when completing an assessment with a member. You need specific information to use the web services to retrieve the questions in an assessment's question group.

To get the questions in a question group, you need the following information:

- Member ID

- ID of the question group

The following graphic shows how to use web services to retrieve the questions in a question group.



1. Retrieve the member ID to be used to retrieve the assessment and the questions.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Retrieve the assessments available for the member using the member ID and the GET / members/

   {memberId}/assessments web service.
4. Store the ID of the question group.
5. Use the ID of the question group and the GET /assessment-metas/question-groups/

{assessmentQuestionGroupId}/questions web service to retrieve the individual questions within the question group.

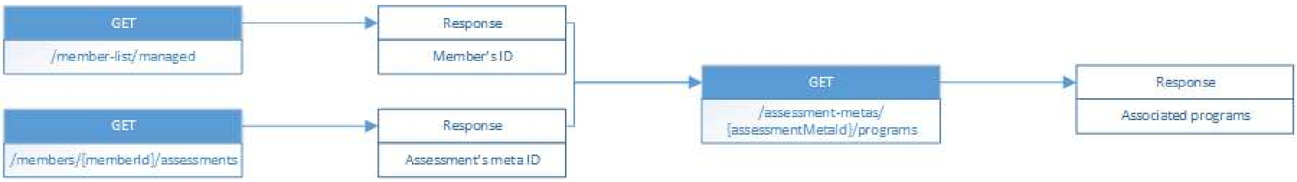
Get the programs on an assessment

You may need to retrieve the programs that are associated with an assessment when completing an assessment with the member. You need specific information to use web services to retrieve the programs that can be created by the completion of an assessment.

To get the associated programs, you need the following information:

- Member ID
- Assessment meta ID

The following graphic shows how to use web services to retrieve the programs on an assessment.



1. Retrieve the member ID to be used to retrieve the assessment and the programs.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Retrieve the assessments available for the member using the member ID and the GET / members/

   {memberId}/assessments web service.
4. Store the metadata's ID of the assessment that has the program.
5. Use the metadata's ID and the GET /assessment-metas/{assessmentMetaId}/programs web service to retrieve the associated programs.

Get a new instance of an assessment

You need to retrieve a new instance of an assessment of the type specified by the ID, and any configuration and metadata required to render and complete the assessment. Trying to access MCG assessment results in an error.

Medication ID might be returned as part of the answers for a question which was answered in context of a medication. This is determined by conditionalArtifactType property for a QuestionGroupDefinition which

indicates that the question group can possibly have medication related questions and answers. In such cases, Medication Summary and Medication Screen permissions are applicable only for Medication Assessment.

It is not possible to start an assessment of a type, if there already is an assessment of that type in progress for that member.

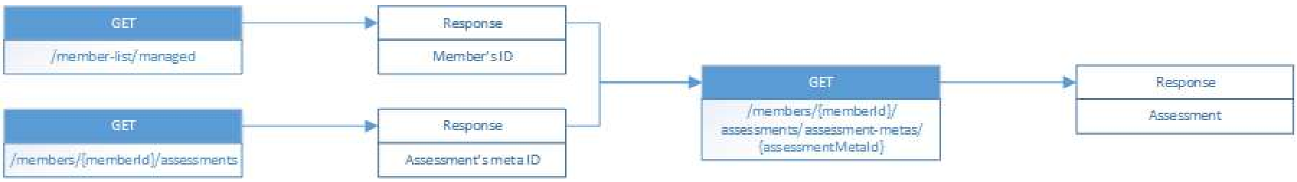
You need the following permissions to run this API

- Assessment screen - View
- Medications summary - View
- Medication screen - View

To get the assessment, you need the following information:

- Member ID
- Assessment meta ID

The following graphic shows how to use web services to retrieve a new instance of an assessment.



1. Retrieve the member ID to be used to retrieve the assessment.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Retrieve the assessments available for the member using the member ID and the GET /members/

   {memberId}/assessments web service.
4. Store the metadata's ID of the assessment that has the program.
5. Use the metadata's ID and the GET /members/{memberId}/assessments/assessment-metas/

{assessmentMetaId} web service to retrieve the assessment.

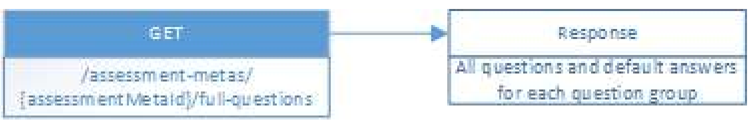
Get all questions in all question groups and their default answers

You might need to retrieve all the questions in all the question groups in an assessment, as well as the default answers to the questions.

To get all questions in all question groups and their default answers, you need the following information:

- Assessment Meta ID

The following graphic shows how to use web services to retrieve all questions in all question groups in an assessment, as well as the default answers.



Use the assessment meta ID and the GET /assessment-metas/{assessmentMetaId}/full-questions web service to retrieve all questions in all question groups and their default answers.

Get all questions and default answers by definition version

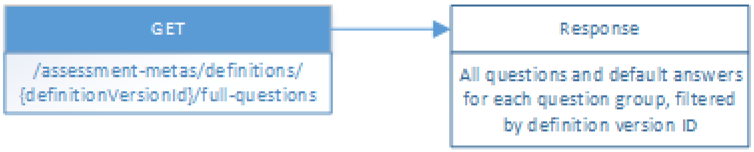
You might need to retrieve all questions in all question groups in an assessment, as well as the default answers to the questions, filtered by definition version ID.

The requested assessment has to be in the published status to get a response.

To retrieve all questions in all question groups and their default answers filtered by definition version ID, you need the following information:

- Definition version ID - required
- Definition version number - optional - if supplied, assessment meta for the specified version number is returned, otherwise the latest version is returned.

The following graphic shows how to use web services to retrieve all questions in all question groups and their default answers, filtered by definition version ID.



Use the definition version ID and the GET /assessment-metas/definitions/{definitionVersion ID}/full-questions web service to retrieve all questions in all question groups and their default answers, filtered by definition version ID.

Create initial or general assessment leveraging latest saved answers

Create an initial or general assessment using the sourceId in the request, for a member using their latest answers to the initial/general assessment questions for the assessmentMetaId in the request.

The API defaults with pre-filled answers for any question ID that is not provided in the request but is part of the assessment definition. The pre-filled answers are taken from the latest submitted assessment instance of the same meta for the member.

For an initial assessment, provide values to the selectedGeneralAssessment attribute with a valid general assessment meta ID applicable for the member's BHP when you proceed to general assessment (proceedToGeneralAssessment is True).

When not proceeding to a general assessment, exclude the selectedGeneralAssessment in the request body (do not include the attribute with a null or empty value).

The startDate attribute is optional. This sets the Start Date of the assessment. It cannot be in the future. If it is not specified, the current date is used.

The offlineCreatedDate attribute is optional. This sets the Created Date of the assessment (date of first save). If it is not specified, the current date is used.

The offlineCompletedDate attribute is optional and can be set only when parameter submit is true. This sets the Completed Date of the assessment. If it is not specified, the current date is used.

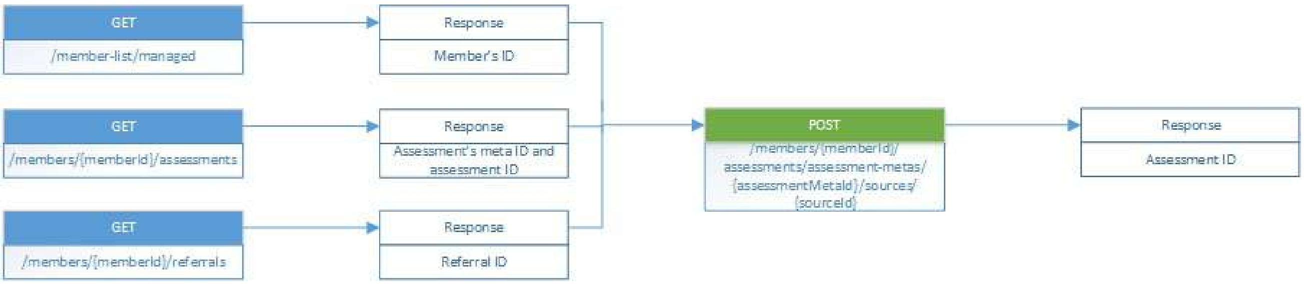
Attempting to create an assessment instance for a MCG assessment meta will result in error. You need the following permissions to run this API:

- Assessment screen - View, Edit, and Create

To post the assessment, you need the following information:

- Member ID
- Member ID type - defaults to Internal
- Assessment Meta ID - the assessment meta ID to be used for the assessment you are creating.
- Source ID - use referral ID if creating an initial assessment; use initial assessment ID if creating a general assessment.
- Assessment type - defaults to Initial. This can be either Initial or General depending on the type of assessment that you are creating.

The following graphic shows how to use web services to create an initial or general assessment for a member using their latest answers to the initial/general assessment questions.



1. Retrieve the member ID to be used to retrieve the assessment.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Retrieve the assessments available for the member using the member ID and the GET /members/

   {memberId}/assessments web service.
4. Store the metadata's ID of the assessment that has the program. If you are creating a general assessment, also store the initial assessment ID.
5. If you are creating an initial assessment, retrieve the referral ID for the member using the member ID and the GET /members/{memberId}/referrals web service.
6. Use the member ID, assessment's meta ID, and initial assessment ID or referral ID (to use as the source ID) and the POST /members/{memberId}/assessments/assessment-metas/{assessment MetaId}/sources/{sourceId} web service to create the initial or general assessment based on the member's latest saved answers.

Assessments

You may need to work with assessments using the web services.

The following sections describe how to use web services to interact with a member's assessments. For example, you can use web services to create an assessment for a member, to update an assessment for a member, and to void an assessment for a member.

Topics in this section

You can retrieve assessments that are available to be created for a member, assessments that have been started for the member, configuration to void an assessment, and any tasks associated to assessments that can be assigned to or claimed by you or another user. You need specific information to use the web services to retrieve a member's assessment summary.

You may need to retrieve the details on an assessment to discuss the assessment with the member. You need specific information to use the web services to retrieve the details on a member's assessment.

Get the signature on an assessment [57]

You may need to retrieve the signature on an assessment to determined who completed or authorized the assessment. You need specific information to use the web services to retrieve the signature on an assessment.

Get member's assessment by task id [57]

You can retrieve a member's assessment by task ID. The task ID may be obtained from one of the tasks in the assessment summary. The assessment might not be started or has been started, but is in a draft state. The task ID might refer to a task to start an assessment of a certain type, or to an assessment that

has already been started. Medication ID might be returned as part of the answers for a question which was answered in context of a medication.

Get an assessment by ID [58]

You can retrieve an existing assessment by assessment ID. You can obtain the assessment ID from the member assessment summary. Medication ID might be returned as part of the answers for a question which was answered in the context of a medication.

Create an assessment [59]

You may need to create an assessment for a member while discussing concerns with the member. You need specific information to use the web services to create an assessment.

Update an assessment [60]

You may need to update a member's assessment if an additional session was needed to complete the assessment or if the member changed their answer to a question. You need specific information to use the web services to update a member's assessment.

Void an assessment [62]

You can void an assessment if it was started erroneously for the member. You need specific information to use the web services to void a member's assessment.

Get recommended care plan elements for a member [62]

You can retrieve recommended care plan elements for a member to help you build a care plan for that member.

Get recommended care plan elements for an assessment [63]

You can retrieve recommended care plan elements for an assessment to help you build a care plan based on that assessment.

Add care plan elements to care plan builder [63] You can add care plan elements to the care plan builder.

Update rank of care plan builder recommendation [64]

You can update the rank and custom recommendation attributes for an existing care plan recommendation artifact ID.

Delete recommended elements from care plan builder for an assessment [65]

You can delete the list of recommended elements from a member's care plan builder for a specific assessment.

Delete recommended elements from care plan builder for all assessments [66]

You can delete the list of recommended elements from a member's care plan builder for all assessments.

Update an assessment with a case [67]

After reviewing the assessment, you might need to update the assessment with the information from the associated case. You need specific information to use web services to update a member's referral with case information.

Delete a case from an assessment [67]

After associating a cas and the assessment, you might need to remove the association of the case with the assessment. You need specific information to use web services to update a member's referral with case information.

Create a draft assessment [68]

You might need to create a draft assessment for a member while discussing concerns with the member. You need specific information to use the web services to create a draft assessment.

Update a draft assessment [69]

You might need to update a draft assessment for a member. You need specific information to use the web services to update a draft assessment.

Submit a draft assessment [71]

You might need to submit a draft assessment for a member. You need specific information to use the web services to submit a draft assessment.

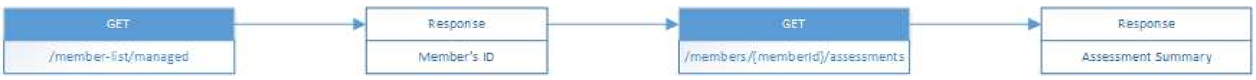
Get the member's assessment summary

You can retrieve assessments that are available to be created for a member, assessments that have been started for the member, configuration to void an assessment, and any tasks associated to assessments that can be assigned to or claimed by you or another user. You need specific information to use the web services to retrieve a member's assessment summary.

To get a member's assessment summary, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a member's assessment summary.



1. Retrieve the member ID to be used to retrieve the assessment summary.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Retrieve the member's assessment summary using the member ID and the GET /members/{member Id}/assessments web service.

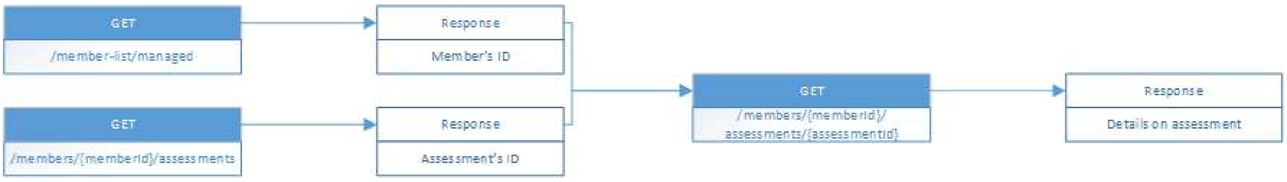
Get the details on an assessment

You may need to retrieve the details on an assessment to discuss the assessment with the member. You need specific information to use the web services to retrieve the details on a member's assessment.

To get the details on an assessment, you need the following information:

- Member ID
- Assessment ID

The following graphic shows how to use web services to retrieve the details on a member's assessment.



1. Retrieve the member ID to be used to retrieve the details on the assessment.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Retrieve the member's in-progress assessment using the member ID and the GET / members/{member Id}/assessments web service.
4. Store the ID of the assessment.
5. Use the member ID, the assessment ID, and the GET /members/{memberId}/assessments/

{assessmentId} web service.

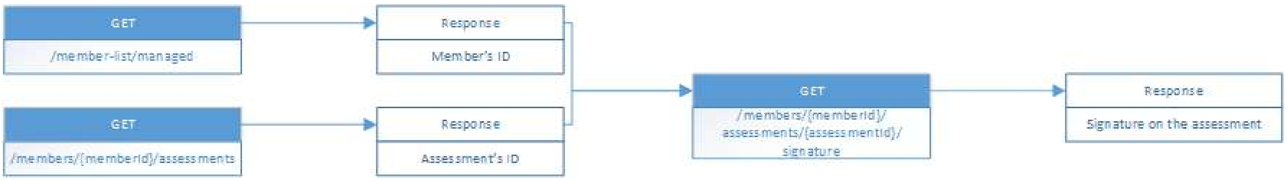
Get the signature on an assessment

You may need to retrieve the signature on an assessment to determined who completed or authorized the assessment. You need specific information to use the web services to retrieve the signature on an assessment.

To get the signature, you need the following information:

- Member ID
- Assessment ID

The following graphic shows how to use web services to retrieve a signature on a member's assessment.



1. Retrieve the member ID to be used to retrieve the signature.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Retrieve the ID of the assessment that has the signature using the member ID and the GET /members/

   {memberId}/assessments web service.
4. Store the ID of the assessment.
5. Use the member ID, the assessment ID, and the GET /members/{memberId}/assessments/

{assessmentId}/signature web service to retrieve the signature.

Get member's assessment by task id

You can retrieve a member's assessment by task ID. The task ID may be obtained from one of the tasks in the assessment summary. The assessment might not be started or has been started, but is in a draft state. The task ID might refer to a task to start an assessment of a certain type, or to an assessment that has already been started. Medication ID might be returned as part of the answers for a question which was answered in context of a medication.

You need the following permissions to run this API

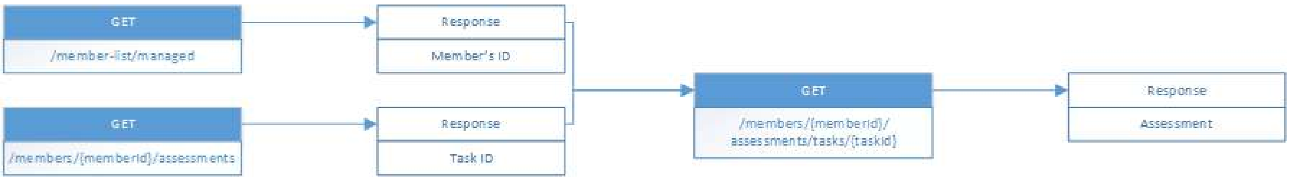
- Assessment screen - View

- Medications summary - View, only needed for a medication assessment
- Medication screen - View, only needed for a medication assessment

To get the assessment, you need the following information:

- Member ID
- Task ID

The following graphic shows how to use web services to retrieve a member's assessment by task ID.



1. Retrieve the member ID to be used to retrieve the assessment.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Retrieve the assessment using the member ID and the GET /members/{memberId}/ assessments

   web service.
4. Store the ID of the task.
5. Use the task ID, the assessment ID, and the GET / members / {memberId} / assessments / tasks / {taskId} web service to retrieve the assessment by task.

Get an assessment by ID

You can retrieve an existing assessment by assessment ID. You can obtain the assessment ID from the member assessment summary. Medication ID might be returned as part of the answers for a question which was answered in the context of a medication.

Related web service:

- Put /members/{memberId}/assessments/{assessmentId}/void-info Business requirements and validation:
- Interchangeable with the endpoint to load an assessment by the task ID, if a task exists for the assessment instance. A check is automatically made for an existing task matching the assessment when it is submitted, so it is not necessary to load it by any particular API in order to complete the task.

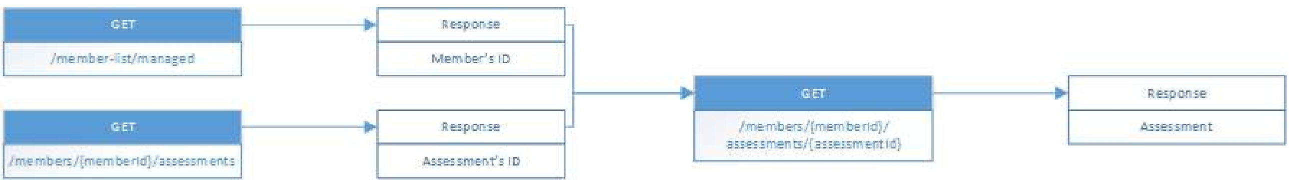
You need the following permissions to run this API

- Assessment Meta - View
- Medications summary - View, only needed for a medication assessment
- Medication screen - View, only needed for a medication assessment

To get the assessment, you need the following information:

- Member ID
- Assessment ID

The following graphic shows how to use web services to retrieve a member's assessment by assessment ID.



1. Retrieve the member ID to be used to retrieve the assessment.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Retrieve the assessment using the member ID and the GET /members/{memberId}/ assessments

   web service.
4. Store the ID of the assessment.
5. Use the member ID, the assessment ID, and the GET / members / {memberId} / assessments/ [assessmentId} web service to retrieve the assessment.

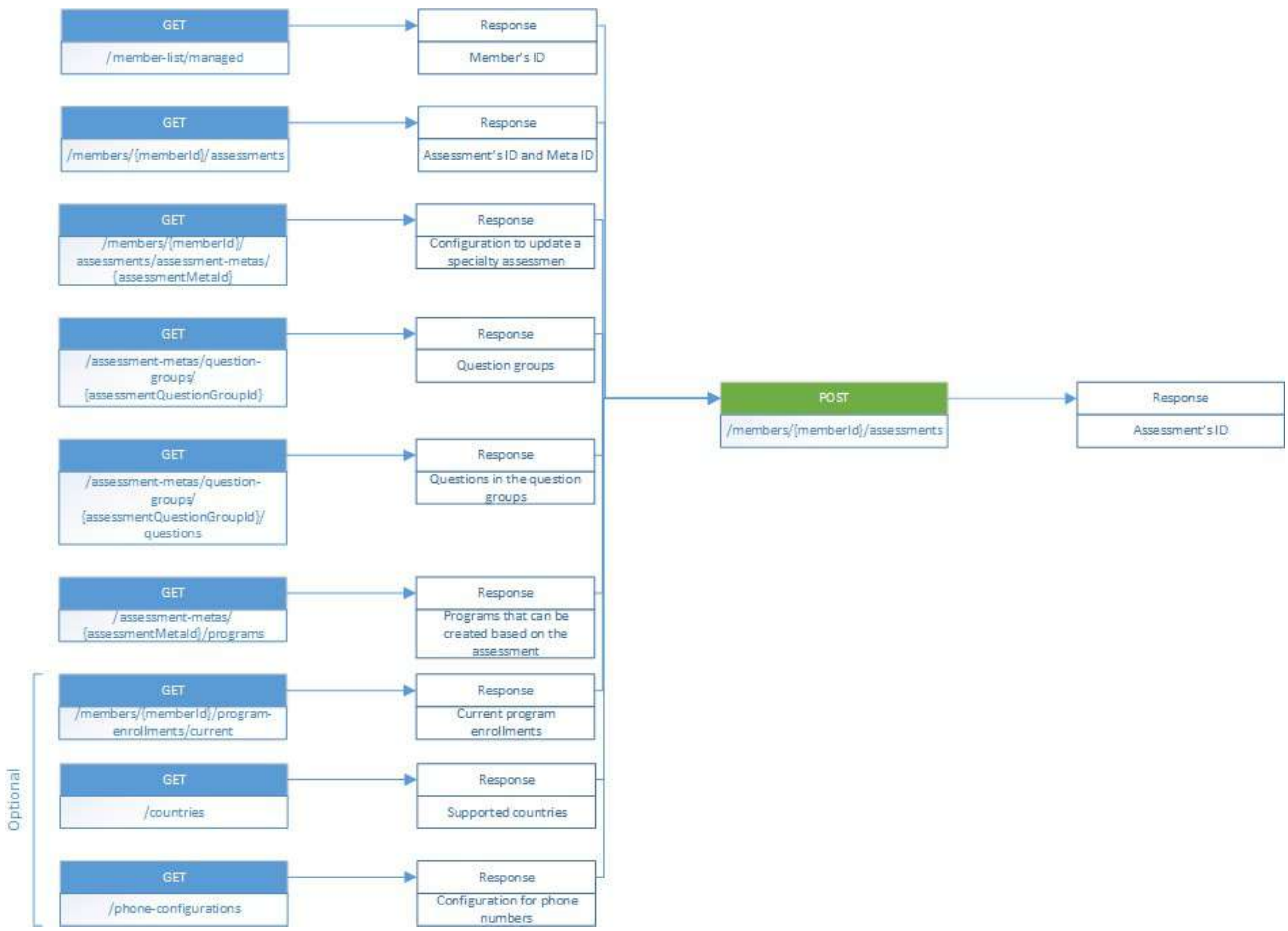
Create an assessment

You may need to create an assessment for a member while discussing concerns with the member. You need specific information to use the web services to create an assessment.

To create an assessment for the member, you need the following information:

- Member ID
- Assessment meta's ID
- Assessment meta information
- Meta information on question groups and available note definitions
- Question definitions for question groups
- Programs the member is enrolled in (optional)
- Supported countries (optional)
- Configuration for phone numbers (optional)

The following graphic shows how to use web services to create an assessment for a member.



1. Retrieve the member ID to be used to create the assessment.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Retrieve the ID of the assessment and the ID of the metadata that is available to be created for the member using the member ID and the GET /members/{memberId}/assessments web service.
4. Use the assessment's meta ID and the GET /members/{memberId}/assessment-metas/

   {assessmentMetaId} web service to return the meta data related to the question groups and the questions on the assessment.
5. Use the question group ID and the GET /assessment-metas/question-groups/{assessment QuestionGroupId} web service to retrieve the metadata on a question group including the available note definitions.
6. Use the question group ID and the GET /assessment-metas/question-groups/{assessment QuestionGroupId}/questions web service to retrieve the definitions for the questions within a question group.
7. Use the metadata ID of the assessment and the GET /assessment-metas/ {assessmentMetaId}/ programs web service to retrieve the programs that can be initiated by the assessment.
8. (Optional) If programs can be initiated by the assessment, use the member ID and the GET /members/

   {memberId}/program-enrollments/current web service to retrieve information on the member's current programs.

   Based on the system's configuration, there may be restrictions on the programs a member can be enrolled in.
9. (Optional) If including an international phone number, use the GET /countries web service to retrieve information on the supported countries.
10. (Optional) If including phone numbers on the assessment, use the GET /phone-configurations web service and the country information, if applicable, to get the configuration for phone numbers.
11. Use the information to the assessment questions, the optional phone information, and the POST / members/{memberId}/assessments web service to create the assessment for the member.

Update an assessment

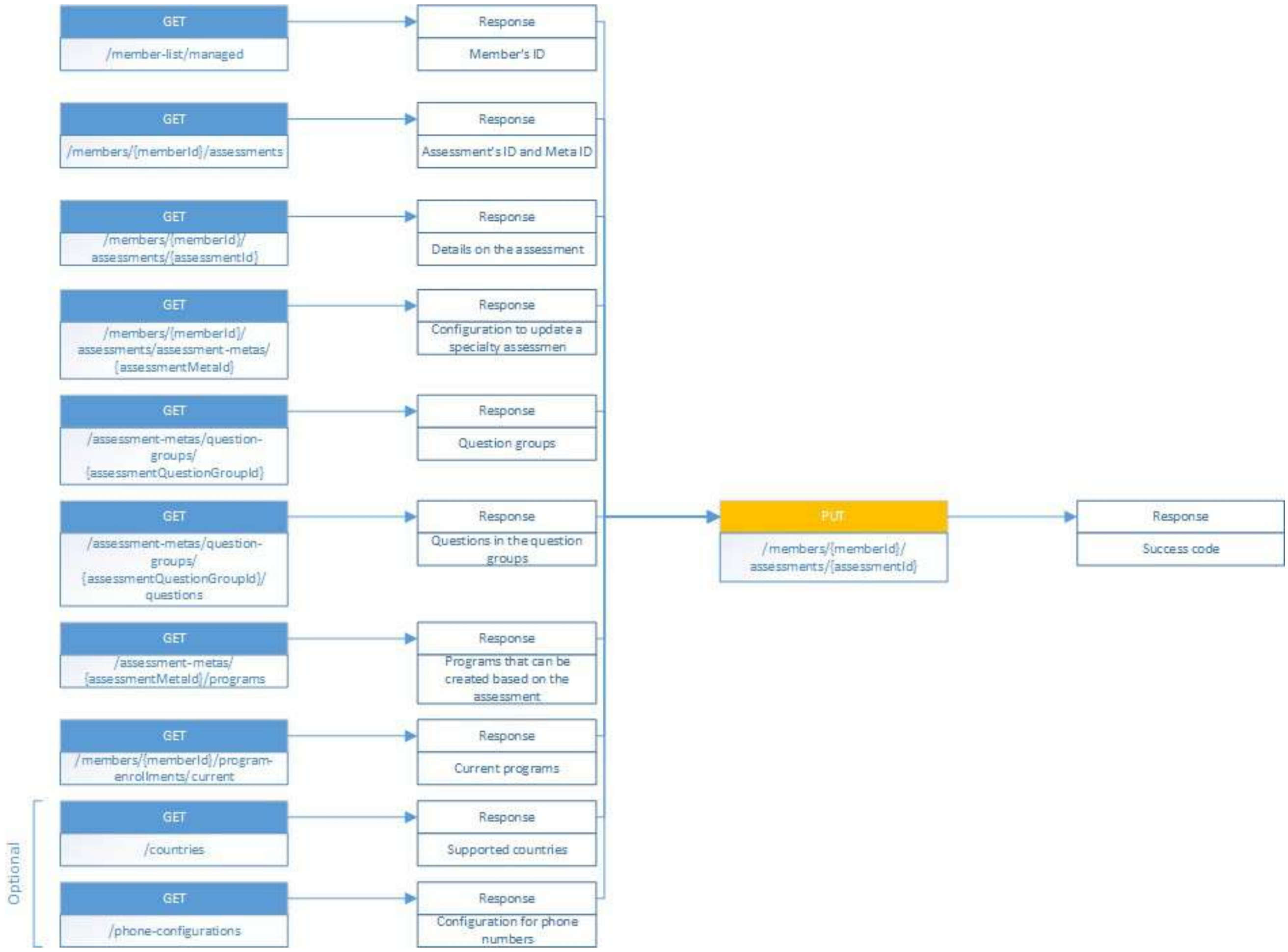
You may need to update a member's assessment if an additional session was needed to complete the assessment or if the member changed their answer to a question. You need specific information to use the web services to update a member's assessment.

To update an assessment, you need the following information:

- Member ID
- Assessment ID and meta ID
- Details on the assessment to be updated
- Metadata and configuration to complete the assessment
- Metadata information on the question groups and the available note definitions
- Question definitions for question groups
- Programs associated to the assessment
- Member's programs
- Supported countries (optional)

- Configuration for phone numbers (optional)

The following graphic shows how to use web services to update a member's assessment.



1. Retrieve the member ID to be used to retrieve and update the assessment.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/assessments web service to retrieve the ID of the in-progress assessment and the ID of the associated metadata.
4. Use the member ID, the assessment ID, and the GET /members/{memberId}/assessments/{assessmentId} web service to get the details on the assessment that is to be updated.
5. Use the member ID, the ID of the assessment's metadata, and the GET /members/{memberId}/ assessments/assessment-meta/{assessmentMetaId} web service to return the metadata information related to the question groups and questions on the assessment.
6. Use the question group ID and the GET /assessment-metas/question-group/{assessment QuestionGroupId} web service to return the metadata on question groups including the available note definitions.
7. Use the question group ID and the GET /assessment-metas/question-groups/{assessment QuestionGroupId}/questions web service to retrieve the definitions for the questions within a question group.
8. Use the metadata ID of the assessment and the GET /assessment-meta/{assessmentMetaId}/ programs web service to retrieve the programs that can be initiated by the assessment.
9. (Optional) If programs can be initiated by the assessment, use the member ID and the GET /members/

{memberId}/program-enrollments/programs web service to retrieve information on the member's programs.

Based on the system's configuration, there may be restrictions on the programs a member can be enrolled in.

10. (Optional) If adding or updating an international phone number, use the GET /countries web service to retrieve information on the supported countries.
11. (Optional) If adding or updating phone numbers on the assessment, use the GET / phone- configurations web service and the country information, if applicable, to get the configuration for phone numbers.
12. Using the information on the existing assessment, the information on the assessment questions, the optional phone information, and the PUT /members/{memberId}/ assessments/{assessmentId} web service to update the assessment for the member.

Void an assessment

You can void an assessment if it was started erroneously for the member. You need specific information to use the web services to void a member's assessment.

To void an assessment, you need the following information:

- Member ID
- Assessment ID
- Device ID

The following graphic shows how to use web services to void a member's assessment.

1. Retrieve the member ID to be used to retrieve and void the assessment.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID, the assessment ID, the device ID, and the PUT /members/{memberId}/ assessments/{assessmentId}/void-info web service to void the assessment.

Get recommended care plan elements for a member

You can retrieve recommended care plan elements for a member to help you build a care plan for that member.

This endpoint loads data without objectiveDefinition and actionDefinition lists in CarePlanElementDefinition. Those fields will be empty even when data actually exists.

To get a member's recommended care plan elements, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a member's recommended care plan elements.

1. Retrieve the member ID to be used to retrieve the recommended care plan elements for that member.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.

2. Store the member ID.
3. Retrieve the member's recommended care plan elements using the member ID and the GET /members/

{memberId}/assessments/care-plan-builder-recommendations web service.

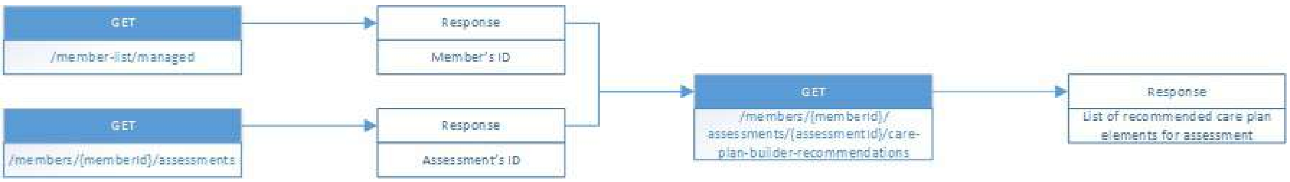
Get recommended care plan elements for an assessment

You can retrieve recommended care plan elements for an assessment to help you build a care plan based on that assessment.

To get the recommended care plan elements for an assessment, you need the following information:

- Member ID
- Assessment ID

The following graphic shows how to use web services to retrieve the recommended care plan elements for an assessment.



1. Retrieve the member ID to be used to retrieve the recommended care plan elements for the member's assessment.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Retrieve the member's assessment using the member ID and the GET /members/ {memberId}/ assessments web service.
4. Store the ID of the assessment.
5. Retrieve the recommended care plan elements for the assessment using the member ID, the assessment ID, and the GET /members/{memberId}/assessments/{assessmentId}/ care-plan-builder- recommendations web service.

Add care plan elements to care plan builder

You can add care plan elements to the care plan builder.

This API allows only new (not already part of recommendation) problems/objectives/actions to be added to the care plan builder for a particular assessment.

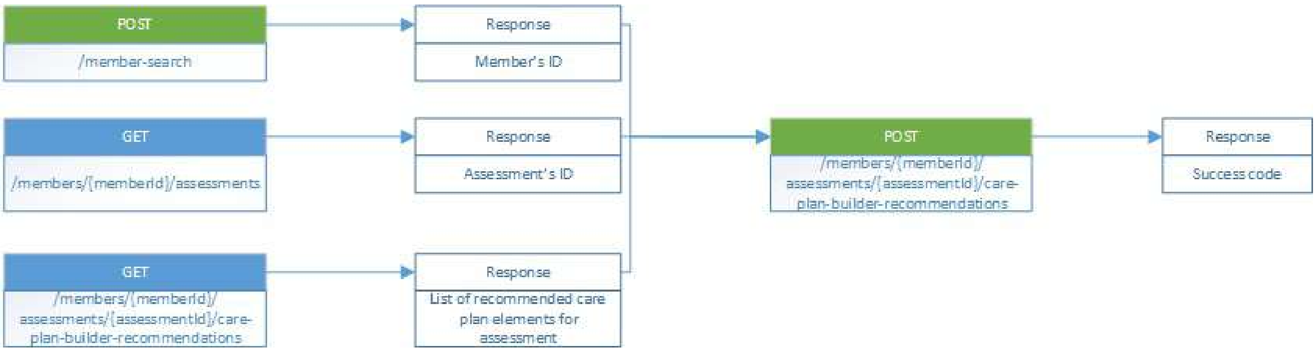
To add care plan elements to the care plan builder at the assessment level, you need the following information:

- Member ID
- Assessment ID
- Member ID type - defaults to internal
- Data for care plan elements: rank of the artifact, parent ID of the artifact, artifact type (problem, objective, or action), artifact definition ID, and Custom column value ("true", "false", or empty)

Nesting of care plan elements:

Level	Problem	Objective	Action	Comments
1 - Under a care plan builder	Y	Y	Y	Under a care plan builder (parent = NULL), all care plan element types can be added. The care plan element added can have its own sub-elements. For example, a problem added to a care plan builder will have objectives configured under it in the admin module. Adding this problem to the builder will also bring the care plan problem objectives along with it.
2 - Under a problem	N/A	Y	N/A	Under a problem element, only an objective element can be added.
3 - Under an objective	N/A	N/A	Y	Only actions can be added under an objective. At this level, the rank is between the multiple actions that are added under the objective.

The following graphic shows how to use web services to add care plan elements to a care plan.



1. Retrieve the member ID to be used to retrieve the care plan elements for the member's assessment.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.
3. Retrieve the member's assessment using the member ID and the GET /members/{memberId}/ assessments web service.
4. Store the ID of the assessment.
5. Retrieve the recommended care plan elements for the assessment using the member ID, the assessment ID, and the GET /members/{memberId}/assessments/{assessmentId}/care-plan-builder- recommendations web service.
6. Store the list of recommended care plan elements.
7. Add care plan elements to the care plan using the POST /members/{memberId}/assessments/

{assessmentId}/care-plan-builder-recommendations web service.

Update rank of care plan builder recommendation

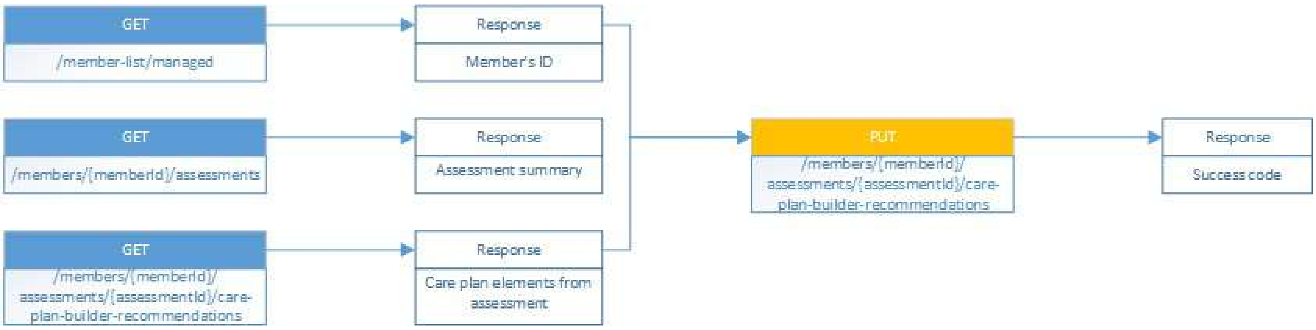
You can update the rank and custom recommendation attributes for an existing care plan recommendation artifact ID.

The rank attribute accepts only whole numbers ranging from 1 to 99. If you would like to remove the rank of a particular artifact, pass the rank attribute with a blank value. This API allows you to update the rank for one or more care plan recommendation artifact IDs corresponding to the member. While creating the request, at least one artifact is necessary to be updated.

To update the rank for an existing care plan recommendation artifact ID, you need the following information:

- Member ID
- Assessment ID
- Member ID type - defaults to internal

The following graphic shows how to use web services to update the rank for an existing care plan recommendation artifact ID.



1. Retrieve the member ID to be used to update the member's care plan recommendation artifact's rank.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Retrieve the member's assessment using the member ID and the GET /members/{memberId}/ assessments web service.
4. Store the ID of the assessment.
5. Retrieve the recommended care plan elements for the assessment using the member ID, the assessment ID, and the GET /members/{memberId}/assessments/{assessmentId}/care-plan-builder- recommendations web service.
6. Store the list of recommended care plan elements.
7. Update the rank for an existing care plan recommendation artifact ID using the PUT / members/

{memberId}/assessments/{assessmentId}/care-plan-builder-recommendations web service.

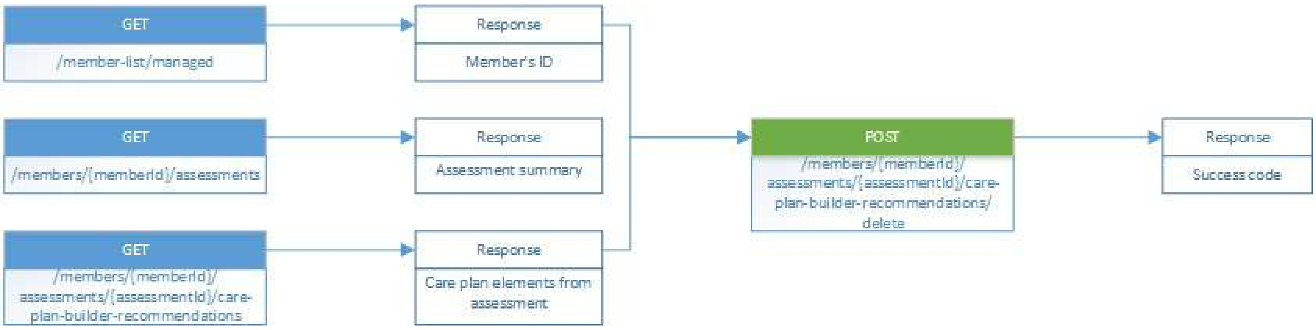
Delete recommended elements from care plan builder for an assessment

You can delete the list of recommended elements from a member's care plan builder for a specific assessment.

To delete the recommended care plan elements from a member's care plan builder for a specific assessment, you need the following information:

- Member ID
- Assessment ID
- List of recommended care plan element IDs to delete

The following graphic shows how to use web services to delete the recommended care plan elements from a member's care plan builder for a specific assessment.



1. Retrieve the member ID to be used to delete the recommended elements from the care plan builder for the member's assessment.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Retrieve the member's assessment using the member ID and the GET /members/{memberId}/ assessments web service.
4. Store the ID of the assessment.
5. Retrieve the recommended care plan elements for the assessment using the member ID, the assessment ID, and the GET /members/{memberId}/assessments/{assessmentId}/ care-plan-builder- recommendations web service.
6. Store the list of recommended care plan elements.
7. Delete the recommended care plan elements from the care plan builder for the assessment using the POST /members/{memberId}/assessments/{assessmentId}/care-plan-builder- recommendations/delete web service.

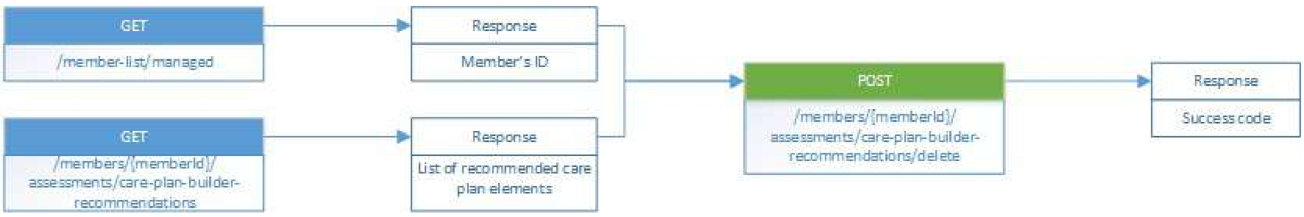
Delete recommended elements from care plan builder for all assessments

You can delete the list of recommended elements from a member's care plan builder for all assessments.

To delete the recommended care plan elements from a member's care plan builder for all assessments, you need the following information:

- Member ID
- List of recommended care plan element IDs to delete

The following graphic shows how to use web services to delete the recommended care plan elements from a member's care plan builder for all assessments.



1. Retrieve the member ID to be used to delete the recommended elements from the member's care plan builder for all assessments.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Retrieve the recommended care plan elements using the member ID and the GET / members/{member Id}/assessments/care-plan-builder-recommendations web service.
4. Store the list of recommended care plan elements.

5. Delete the recommended care plan elements from the member's care plan builder for all assessments using the POST /members/{memberId}/assessments/care-plan-builder-recommendations/delete web service.

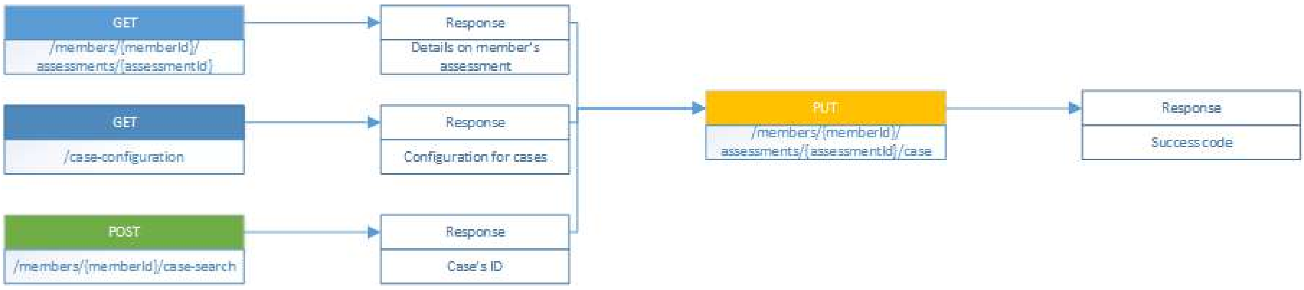
Update an assessment with a case

After reviewing the assessment, you might need to update the assessment with the information from the associated case. You need specific information to use web services to update a member's referral with case information.

To update an assessment with a case, you need the following information:

- Member ID
- Member ID type
- Assessment ID

The following graphic shows how to use web services to update a member's assessment with case information.



1. Use the member ID and assessment ID and the GET /members/{memberId}/assessments/{assessmentId} web service to get details of the member's assessment.
2. Store the case ID or the case number.
3. Use the GET /case-configuration web service to get the configuration for cases.
4. Use the POST /members/{memberId}/case-search web service to find the case to the assessment.
5. Use PUT /members/{memberId}/assessments/{assessmentId}/case web service to link the case to the assessment.

Delete a case from an assessment

After associating a cas and the assessment, you might need to remove the association of the case with the assessment. You need specific information to use web services to update a member's referral with case information.

To delete a case from an assessmentt, you need the following information:

- Member ID
- Member ID type
- Assessment ID
- Assessment version

The following graphic shows how to use web services to delete case information from a member's assessment.

1. Use the member ID and assessment ID and the GET /members/{memberId}/assessments/{assessmentId} web service to get details of the member's assessment.
2. Use the DELETE /members/{memberId}/assessments/{assessmentId}/case web service to delete the case from the assessment.

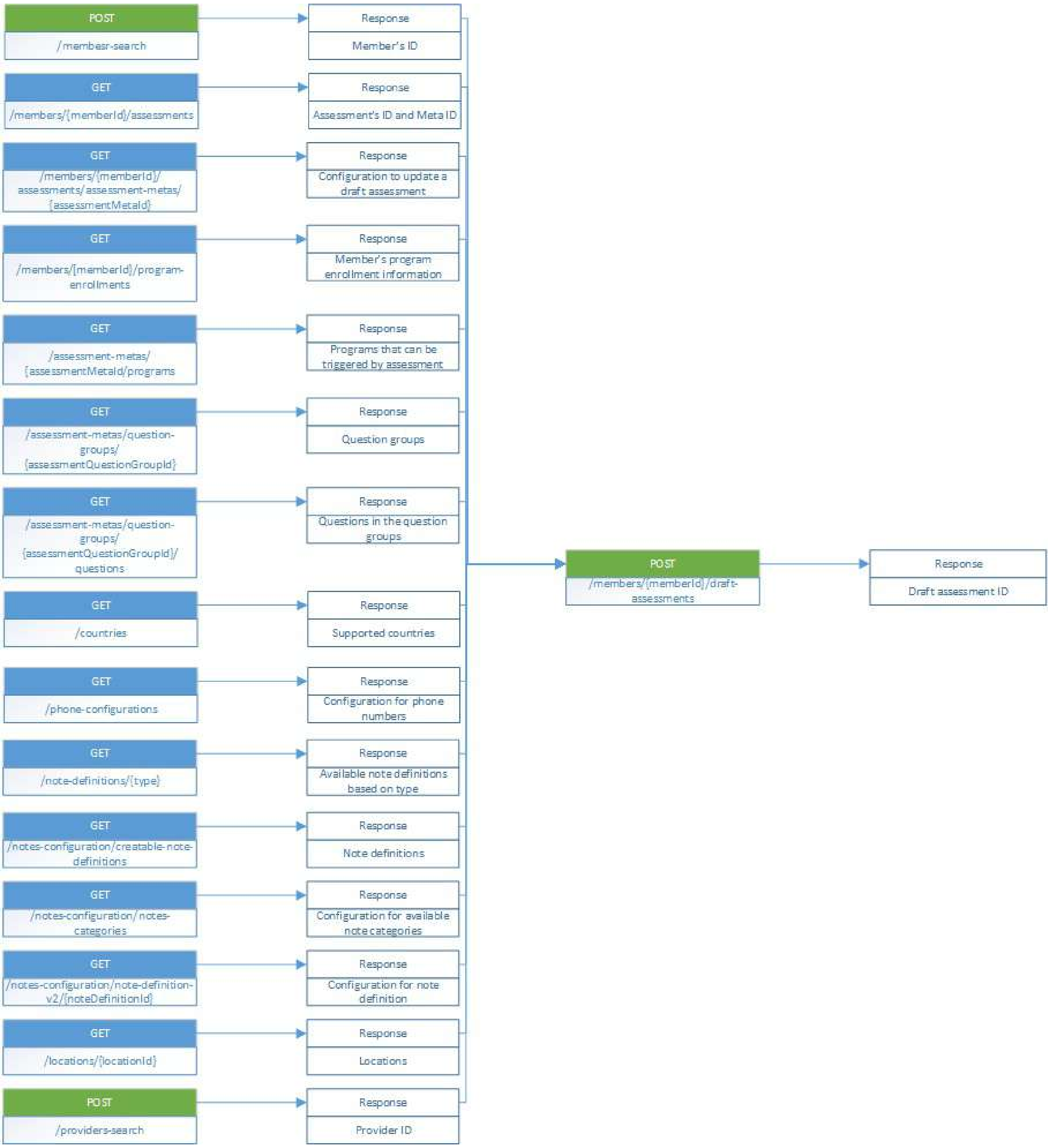
Create a draft assessment

You might need to create a draft assessment for a member while discussing concerns with the member. You need specific information to use the web services to create a draft assessment.

To create an assessment for the member, you need the following information:

- Member ID
- Member ID type

The following graphic shows how to use web services to create a draft assessment for a member.



1. Search for the member ID to be used to create the assessment using the POST /member-search web service.
2. Store the member ID.

3. Retrieve the ID of the assessment and the ID of the metadata that is available to be created for the member using the member ID and the GET /members/{memberId}/assessments web service.
4. Retrieve the metadata necessary to draft the assessment using the member ID and the metadata ID and the GET /members/{memberId}/assessments/assessment-metas/{assessmentMetaId} web service.
5. Get the member's program enrollment information using the GET /members/{memberId}/program- enrollments/programs web service.
6. Get the programs that can be triggered by the assessment using the GET /assessment-metas/

   {assessmentMetaId/programs web service.
7. Retrieve the question groups in an assessment and the questions using the GET / assessment- metas/question-groups/{assessmentQuestionGroupId} and GET /assessment-metas/ question-groups/{assessmentQuestionGroupId}/questions web services.
8. If including an international phone number, use the GET /countries web service to retrieve information on the supported countries.
9. If including phone numbers on the assessment, use the GET /phone-configurations web service and the country information, if applicable, to get the configuration for phone numbers.
10. Retrieve the available note definitions based on note type using the GET /note-definitions/{type}

    web service.
11. Retrieve a list of note definitions using the GET /notes-configuration/create-note- definitions web service.
12. Get the configuration for the available note categories using the GET /notes-configuration/note- categories web service.
13. Retrieve the configuration of the note definition using the GET /notes-configuration/note-definition/{noteDefinitionId} web service.
14. Retrieve the location details using the GET /locations/{locationId} web service.
15. Search for the provider ID using the POST /providers-search web service.
16. Use the information to the assessment questions, the optional phone information, and the POST / members/{memberId}/draft-assessments web service to create the draft-assessment for the member.

Update a draft assessment

You might need to update a draft assessment for a member. You need specific information to use the web services to update a draft assessment.

To create an assessment for the member, you need the following information:

- Member ID
- Member ID type
- Draft assessment ID

The following graphic shows how to use web services to update a draft assessment for a member.

1. Search for the member ID to be used to create the assessment using the POST /member-search web service.
2. Store the member ID.
3. Create a draft assessment using the POST /member/{memberId}/draft-assessments/{draft AssessmentOd} web service.
4. Retrieve the ID of the assessment and the ID of the metadata that is available to be created for the member using the member ID and the GET /members/{memberId}/assessments web service.
5. Retrieve the question groups in an assessment and the questions using the GET / assessment- metas/question-groups/{assessmentQuestionGroupId} web service.
6. If including an international phone number, use the GET /countries web service to retrieve information on the supported countries.
7. If including phone numbers on the assessment, use the GET /phone-configurations web service and the country information, if applicable, to get the configuration for phone numbers.
8. Retrieve the available note definitions based on note type using the GET /note-definitions/ {type}

   web service.
9. Retrieve a list of note definitions using the GET /notes-configuration/creatable-note-definitions web service.
10. Get the configuration for the available note categories using the GET /notes-configuration/ note- categories web service.

11. Retrieve the configuration of the note definition using the GET /notes-configuration/note-definition-v2/{noteDefinitionId} web service.
12. Retrieve the location details using the GET /locations/{locationId} web service.
13. Search for the provider ID using the POST /providers-search web service.
14. Use the information to the assessment questions, the optional phone information, and the POST / members/{memberId}/draft-assessments web service to create the draft-assessment for the member.

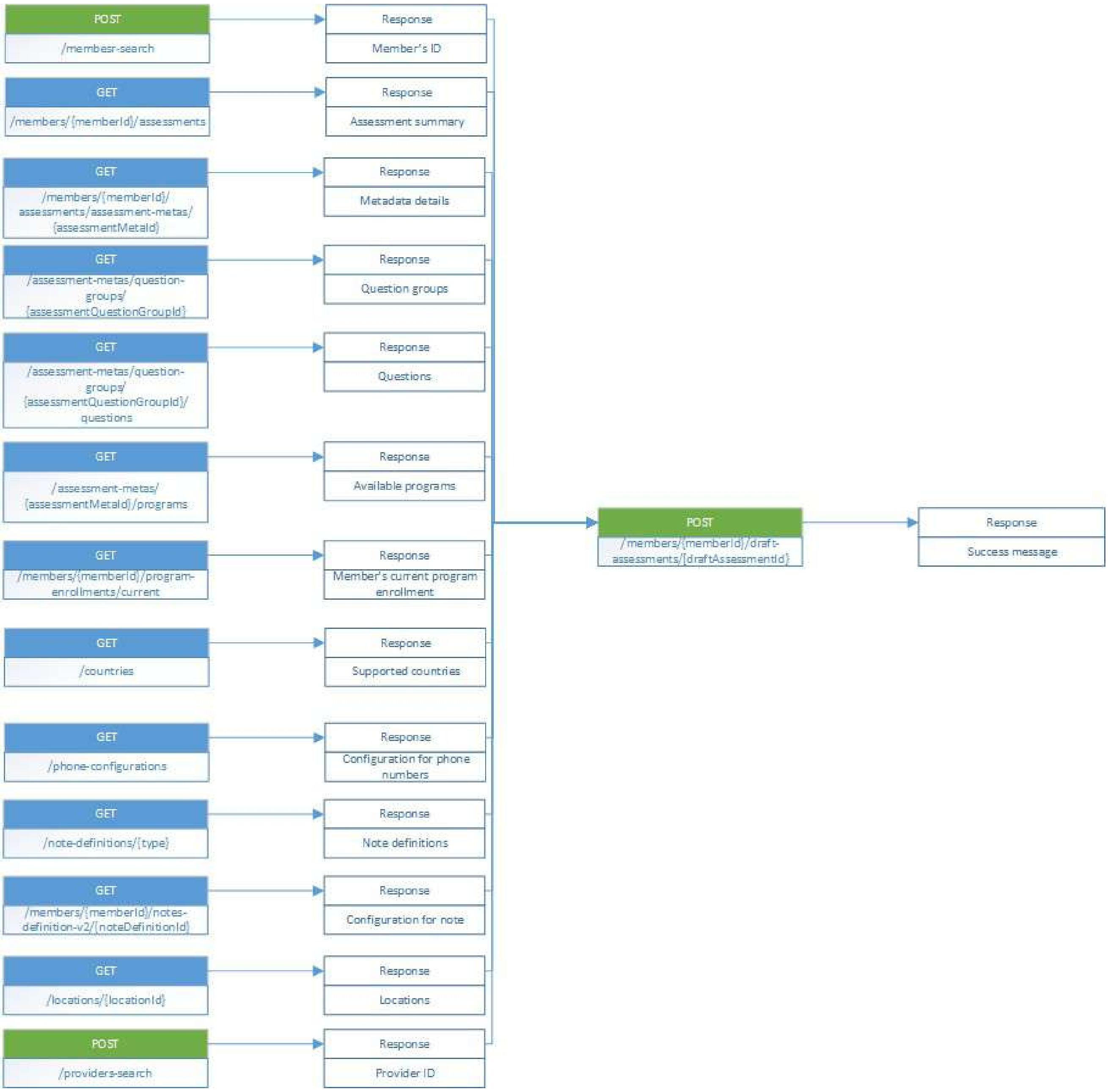
Submit a draft assessment

You might need to submit a draft assessment for a member. You need specific information to use the web services to submit a draft assessment.

To create an assessment for the member, you need the following information:

- Member ID
- Member ID type
- Draft assessment ID

The following graphic shows how to use web services to submit a draft assessment for a member.



1. Search for the member ID to be used to create the assessment using the POST /member-search web service.
2. Store the member ID.
3. Retrieve the ID of the assessment and the ID of the metadata that is available to be created for the member using the member ID and the GET /members/{memberId}/assessments web service.
4. Retrieve the metadata details, using theGET /members/{memberId}/assessments/assessment- metas/{assessmentMetaId} web service.
5. Retrieve the question groups and the questions using the GET /assessment-metas/question- groups/{assessmentQuestionGroupId} and GET /assessment-metas/question-groups/

   {assessmentQuestionGroupId}/questions web services.
6. Get available programs using the GET /assessment-metas/{assessmentMetaId}/programs web service.
7. Retrieve the member's current program enrollment using the member ID and the GET /members/

   {memberId}/program-enrollments/current web service.
8. If including an international phone number, use the GET /countries web service to retrieve information on the supported countries.
9. If including phone numbers on the assessment, use the GET /phone-configurations web service and the country information, if applicable, to get the configuration for phone numbers.
10. Retrieve the a note definitions using the GET /note-definitions}/{type} web service.
11. Retrieve the a note configuration using the GET /members/{memberId}/notes-configuration/

    {notDefinitionId} web service.
12. Retrieve the location details using the GET /locations/{locationId} web service.
13. Search for the provider ID using the POST /providers-search web service.
14. Use the information to the assessment questions, the optional phone information, and the POST / members/{memberId}/draft-assessments/[draftAssessmentId} web service to submit the draft-assessment for the member.

Authorizations

The user can use web service to work with a member's authorizations.

The following sections describe how to use web services to interact with a member's authorizations. For example, with the correct permissions, the user can retrieve, create, and update an authorization.

Topics in this section

Get the configuration to search the member's authorizations [74]

You may need to search for member's authorizations. You need specific information to use web services to retrieve the configuration for searches.

Search for a member's authorization [75]

You may need to review an authorization with a member. You need specific information to use web services to search for a member's authorization.

Get the details on the member's authorization [75]

You may need to review the details of an authorization with the member. You need specific information to use web services to retrieve the details on a member's authorization.

Get the authorization's header information [76]

You may need to review the information on the authorization with the member including the state, the status, or the source who requested the authorization. You need specific information to use web services to retrieve the header information on a member's authorization header.

Get the diagnosis information on an authorization [76]

You may need to review the diagnosis information on the authorization. You need specific information to use web services to retrieve the diagnosis information on a member's authorization.

Get the details on a line item [77]

You may need to review the information on a line item on their authorization. You need specific information to use web services to retrieve the details on a line item.

Get the reviews on an authorization's line items [78]

You may need to review the reviews on a line item with the member. You need specific information to use web services to retrieve the line items' reviews on a member's authorization.

Get the requesting provider on an authorization [78]

You may need to review the requesting provider on the authorization with a member. You need specific information to use web services to retrieve the requesting provider on a member's authorization.

Get the RFIs on an authorization [79]

You may need to review the RFIs (requests for information) on the authorization with the member. You need specific information to use web services to retrieve the RFIs on a member's authorization.

Create an RFI on an authorization [80]

You may need to create an RFI (request for information) on an authorization when reviewing the authorization with the member. You need specific information to use web services to create an RFI on a member's authorization.

Get the determination on a line item [80]

You may need to review the determination on a line item with the member. You need specific information to use web services to retrieve the determination on a line item.

Create a determination on a line item [81]

You may have a task to determine a line item on a member's authorization. You need specific information to use web services to create a determination on a line item.

Create an authorization [82]

You may need to create an authorization (inpatient, service/procedure, or Rx) for a member after a meeting or an appointment with the member. You need specific information to use web services to create an authorization for a member.

Get the attachments on an authorization [86]

You may need to review the attachment on an authorization with the member. You need specific information to use web services to retrieve the attachments on a member's authorization.

Create an attachment on an authorization [86]

You may need to create or add an attachment, for example, an image of an x-ray, to an authorization after reviewing the authorization with the member. You need specific information to create an attachment on a member's authorization.

Create a note on an authorization [87]

After creating or reviewing an authorization with the member, you may need to add or create a note on the authorization. You need specific information to use web services to create a note on a member's authorization.

Get the notes on an authorization [88]

You may need to review the notes that were previously recorded on an authorization with the member. You need specific information to use web services to retrieve the notes on a member's authorization.

Authorization locking [89]

You can update an entire authorization at one time with the PUT /members/{memberId}/authorizations/{authorizationId} web service. When doing so you can also provide determination information, but know that this can cause problems if the authorization is locked.

Update an authorization [90]

You may need to update an entire authorization after a discussion with the member. You need specific information to use the web services to update a member's authorization.

Create an appeal on an authorization [93]

You may need to create an appeal on an authorization after reviewing the determination with the member. To create an appeal, you can use web services. You need specific information to use web services to create an appeal on a member's authorization.

Get the BHP configuration for line item clinical reviews [94]

You can get a member's BHP configuration for line item clinical reviews using web services.

Get the configuration for creating a line item clinical review [94]

You can retrieve the configuration for creating a line item clinical review using web services.

Get the configuration for creating a line item advisor review [95]

You can retrieve the configuration for creating a line item advisor review using web services.

Create a line item clinical review on an authorization [95]

You can create a clinical review on an authorization line item using web services.

Create a line item advisor review on an authorization [96]

You can create an advisor review on an authorization line item using web services.

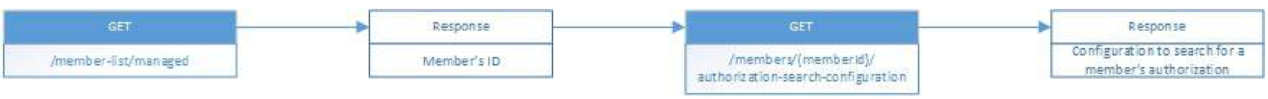
Get the configuration to search the member's authorizations

You may need to search for member's authorizations. You need specific information to use web services to retrieve the configuration for searches.

To get the configuration, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve the configuration to perform a search for a member's authorizations.



1. Retrieve the member ID to be used to retrieve the information.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.

3. Use the member ID and the GET /members/{memberId}/authorization-search- configuration web service to return the configuration to search for a member's authorization.

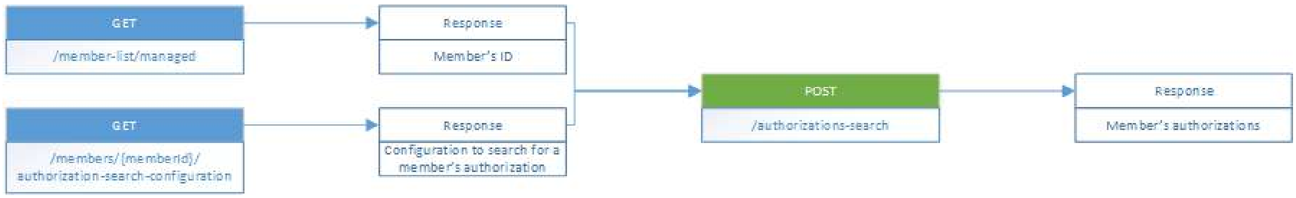
Search for a member's authorization

You may need to review an authorization with a member. You need specific information to use web services to search for a member's authorization.

To search for a member's authorization, you need the following information:

- Member ID
- Configuration to complete a search

The following graphic shows how to use web services to search for a member's authorization.



1. Retrieve the member ID to be used to retrieve the authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/authorization-search- configuration web service to retrieve the configuration to search the member's authorizations.

   Refer to Get the configuration to search the member's authorizations [74] on page 100 for more information on the web service.
4. Use the member ID, any search criteria, and the POST /authorizations-search web service to search for the member's authorization.

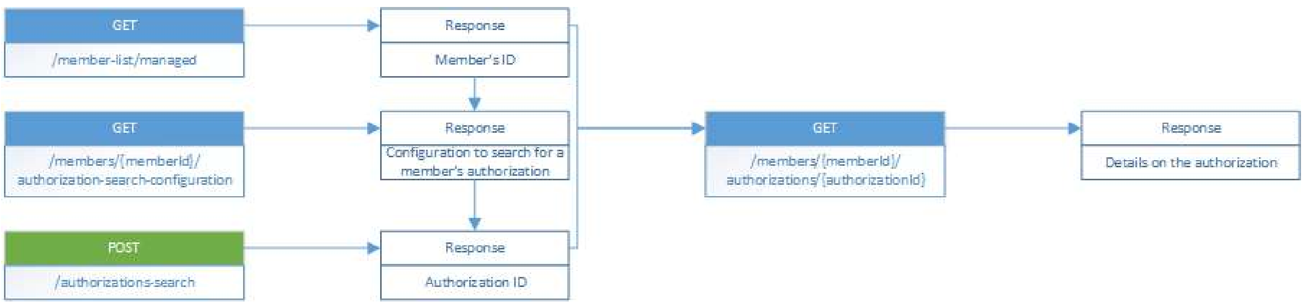
Get the details on the member's authorization

You may need to review the details of an authorization with the member. You need specific information to use web services to retrieve the details on a member's authorization.

To get the details on an authorization, you need the following information:

- Member ID
- Authorization ID

The following graphic shows how to use web services to retrieve the details on a member's authorization.



1. Retrieve the member ID to be used to retrieve the authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to view in detail.

Refer to Search for a member's authorization [75] on page 101 for more information for searching for an authorization.

4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/authorizations/

{authorizationId} web service to retrieve the details on the authorization.

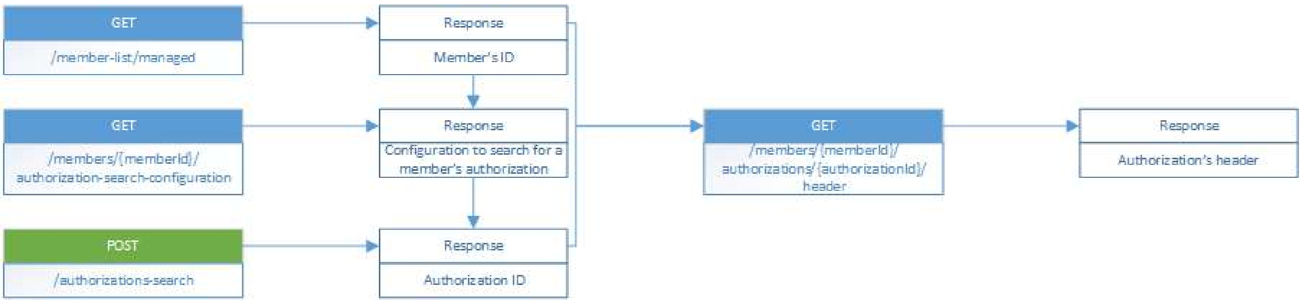
Get the authorization's header information

You may need to review the information on the authorization with the member including the state, the status, or the source who requested the authorization. You need specific information to use web services to retrieve the header information on a member's authorization header.

To get the authorization's header, you need the following information:

- Member ID
- Authorization ID

The following graphic shows how to use web services to retrieve the header information on a member's authorization.



1. Retrieve the member ID to be used to retrieve the authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information for searching for an authorization.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/authorizations/

{authorizationId}/header web service to retrieve the header information on the authorization.

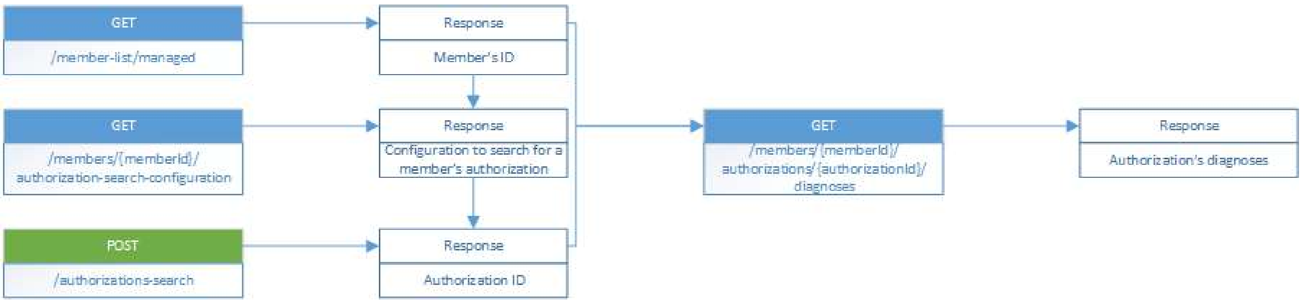
Get the diagnosis information on an authorization

You may need to review the diagnosis information on the authorization. You need specific information to use web services to retrieve the diagnosis information on a member's authorization.

To retrieve the diagnosis information, you need the following information:

- Member ID
- Authorization ID

The following graphic shows how to use web services to retrieve the diagnosis information on a member's authorization.



1. Retrieve the member ID to be used to retrieve the diagnosis information.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information for searching for an authorization.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/ authorizations/

{authorizationId}/diagnoses web service to retrieve the diagnosis information on the authorization.

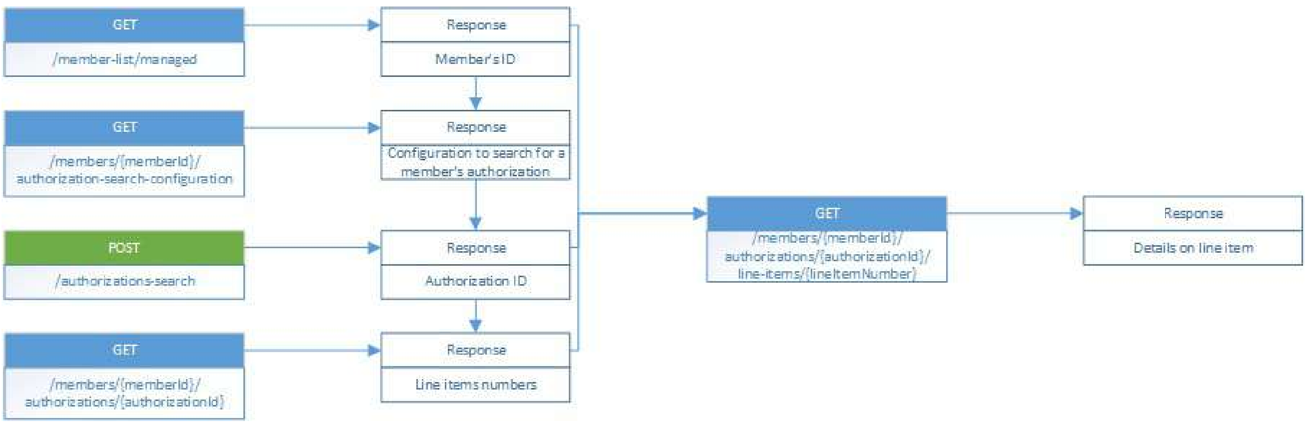
Get the details on a line item

You may need to review the information on a line item on their authorization. You need specific information to use web services to retrieve the details on a line item.

To get the details on a line item, you need the following information:

- Member ID
- Authorization ID
- Line item number

The following graphic shows how to use web services to retrieve the details on a line item.



1. Retrieve the member ID to be used to retrieve the authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to view in detail.

   Refer to Search for a member's authorization [75] on page 101 for more information for searching for an authorization.
4. Retrieve the details on the authorization, including the number of line items.

Refer to Get the details on the member's authorization [75] on page 101 for more information.

5. Store the number of the line item you want to view in detail.
6. Use the member ID, the authorization ID, the number of the line item, and the GET /members/{member Id}/authorizations/{authorizationId}/line-items/{lineItemNumber} web service to retrieve the details on the line item.

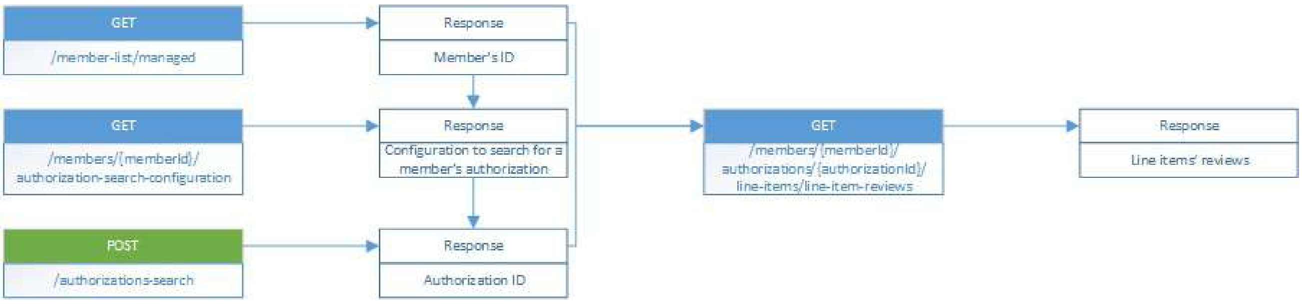
Get the reviews on an authorization's line items

You may need to review the reviews on a line item with the member. You need specific information to use web services to retrieve the line items' reviews on a member's authorization.

To get the reviews on the line items, you need the following information:

- Member ID
- Authorization ID

The following graphic shows how to use web services to retrieve the reviews on the line items.



1. Retrieve the member ID to be used to retrieve the reviews.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information for searching for an authorization.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/authorizations/

{authorizationId}/line-items/line-item-reviews web service to get the reviews on the authorization's line items.

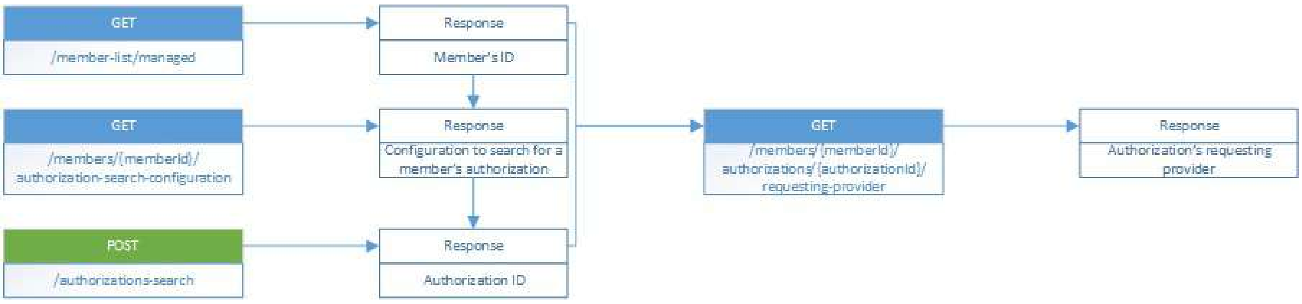
Get the requesting provider on an authorization

You may need to review the requesting provider on the authorization with a member. You need specific information to use web services to retrieve the requesting provider on a member's authorization.

To get the requesting provider on an authorization, you need the following information:

- Member ID
- Authorization ID

The following graphic shows how to use web services to retrieve the requesting provider on a member's authorization.



1. Retrieve the member ID to be used to retrieve the requesting provider.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Retrieve the authorization ID that you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information for searching for an authorization.
4. Store the ID of the authorization you want to view.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/ authorizations/

{authorizationId}/requesting-provider web service to retrieve the requesting provider on the authorization.

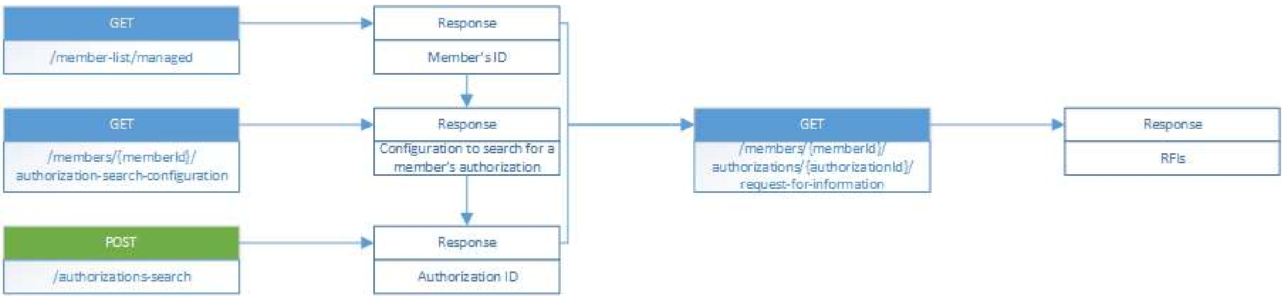
Get the RFIs on an authorization

You may need to review the RFIs (requests for information) on the authorization with the member. You need specific information to use web services to retrieve the RFIs on a member's authorization.

To retrieve the RFIs, you need the following information:

- Member ID
- Authorization ID

The following graphic shows how to use web services to retrieve all the RFIs on a member's authorization.



1. Retrieve the member ID to be used to retrieve the authorization ID and the associated RFIs.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that has the RFIs you want to review.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/ authorizations/

{authorizationId}/request-for-information web service to get the RFIs on the authorization.

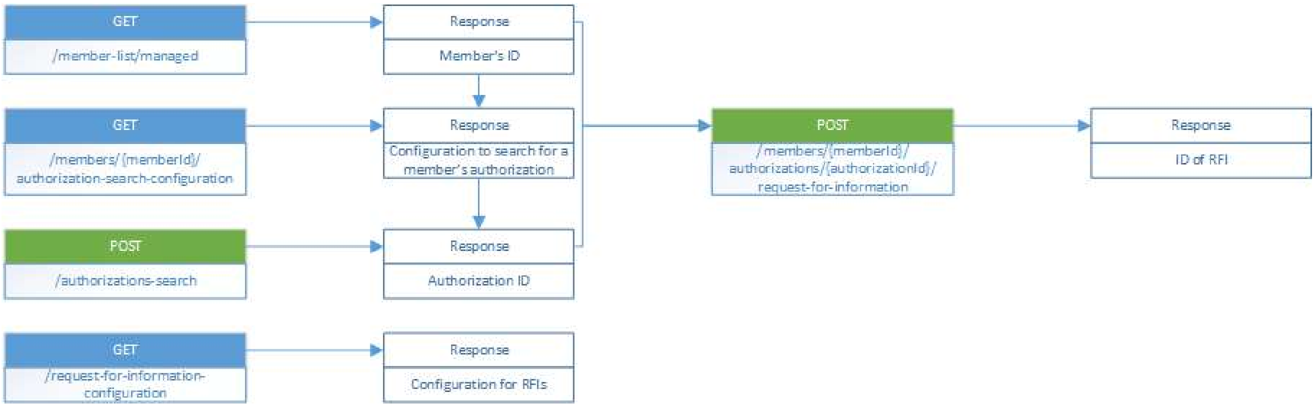
Create an RFI on an authorization

You may need to create an RFI (request for information) on an authorization when reviewing the authorization with the member. You need specific information to use web services to create an RFI on a member's authorization.

To create an RFI, you need the following information:

- Member ID
- Authorization ID
- Configuration to create an RFI

The following graphic shows how to use web services to create an RFI on a member's authorization.



1. Retrieve the member ID to retrieve and update the authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that needs to be updated.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the GET /request-for-information-configuration web service to get the configuration to create an RFI.
6. Use the member ID, the authorization ID, the RFI's information, the POST /members/{memberId}/ authorizations/{authorizationId}/request-for-information web service to create an RFI on the authorization.

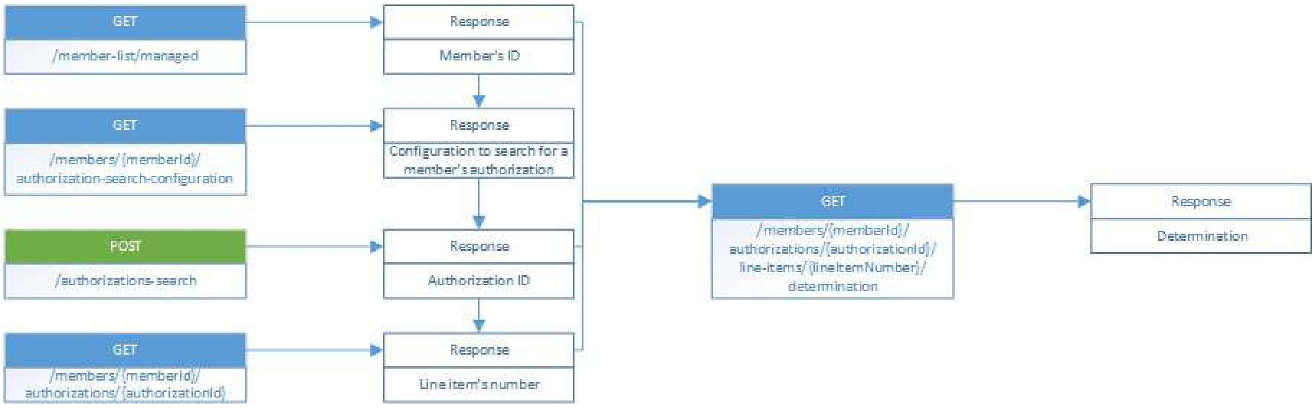
Get the determination on a line item

You may need to review the determination on a line item with the member. You need specific information to use web services to retrieve the determination on a line item.

To get the determination, you need the following information:

- Member ID
- Authorization ID
- Line item number

The following graphic shows how to use web services to retrieve the determination on a line item.



1. Retrieve the member ID to retrieve the authorization and its associated line items.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that has the determined line item you want to view. Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/ authorizations/

   {authorizationId} web service to get the details on the authorization including the number of line items.
6. Store the number of the line item you want to view.
7. Use the member ID, the authorization ID, the line item number, and the GET /members/{memberId}/ authorizations/{authorizationId}/line-items/{lineItemNumber}/determination web service to get the determination information on the line item.

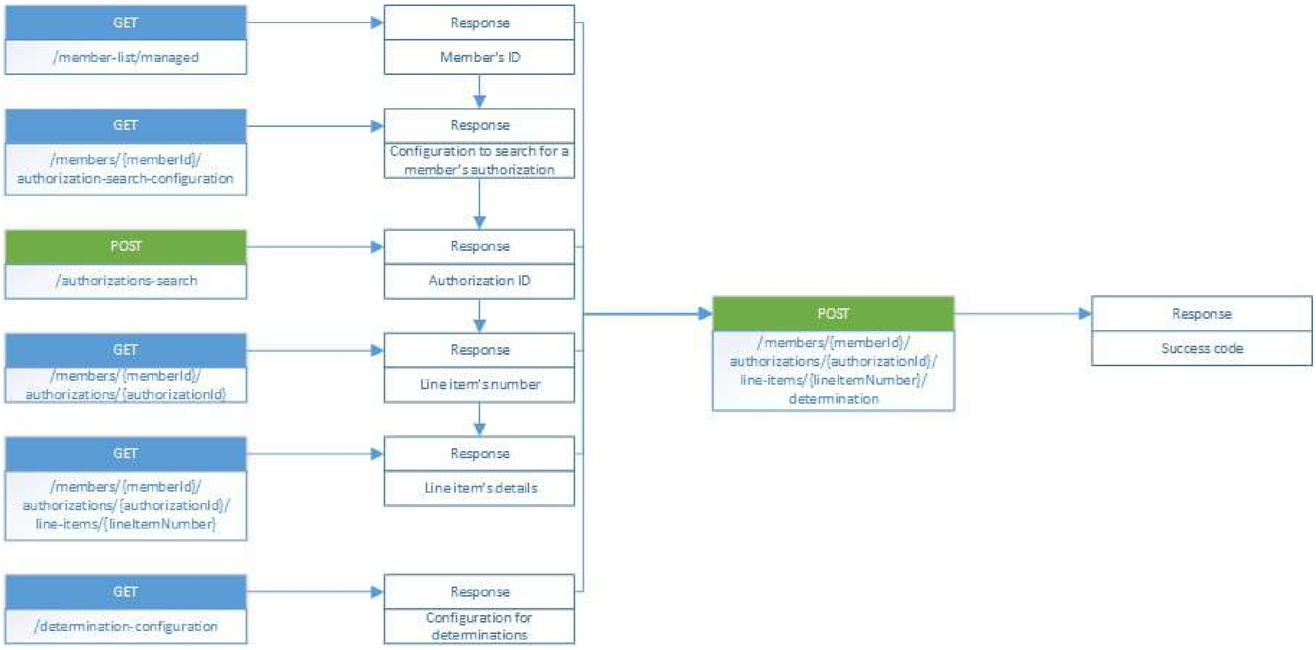
Create a determination on a line item

You may have a task to determine a line item on a member's authorization. You need specific information to use web services to create a determination on a line item.

To create a determination on a line item, you need the following information:

- Member ID
- Authorization ID
- Line item's number
- Details on the line item
- Configuration to create a determination

The following graphic shows how to use web services to create a determination for a member's authorization.



1. Retrieve the member ID to retrieve and update the line item to be determined.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.
3. Search for the authorization that has the line item that needs to be determined. Refer to Search for a member's authorization [75] for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/ authorizations/

   {authorizationId} web service to get the details on the authorization including the number of line items.
6. Store the number of the line item to be determined.
7. Use the member ID, the authorization ID, the line item's number, and the GET /members/{memberId}/ authorizations/{authorizationId}/line-items/{lineItemNumber} web service to get the details on the line item.
8. Use the GET /determination-configuration web service to get the configuration to create a determination.
9. Use the member ID, the authorization ID, the line item's number, the determination information, and the POST /members/{memberId}/authorizations/{authorizationId}/line-items/{lineItem Number}/determination web service to determine the line item.

Create an authorization

You may need to create an authorization (inpatient, service/procedure, or Rx) for a member after a meeting or an appointment with the member. You need specific information to use web services to create an authorization for a member.

To create an authorization for the member, you need the following information:

- Member ID
- Configuration for the appropriate authorization type (inpatient authorizations, Rx authorization, service/ procedure authorization)
- Configuration for the appropriate line items to be added (inpatient, Rx, service/procedure)
- Member's eligibility information
- Information on the appropriate provider or facility

- Diagnosis information
- Procedure information
- Medication information
- Determination configuration (optional)

Note: If Eventing is enabled for the following events (line item create, authorization create, and authorization update) and you create an authorization with two line items (one with determination information and one without determination information), then the authorization is not locked.

- Note information (optional)
- Queue or user information (optional)
- Discharge configuration (optional)
- Supported countries (optional)
- Configuration for phone numbers (optional)
- Configuration for addresses (optional)

The following graphic shows how to use web services to create an authorization for a member.

1. Retrieve the member ID to be used to create the authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Depending on the authorization you are creating, use the appropriate web service to retrieve the configuration to create the authorization.
   - GET /inpatient-authorization-configuration— Get the configuration for inpatient authorizations.
   - GET /inpatient-authorization-configuration/bhp-configuration — Get the configuration for an inpatient authorization based on the BHP node.

- GET /rx-authorization-configuration — Get the configuration for Rx authorizations.
- GET /service-procedure-authorization-configuration — Get the configuration for service/ procedure authorizations.
- GET /service-procedure-authorization-configuration/bhp-configuration — Get the configuration for service/procedure authorizations based on the BHP node.

4. Depending on the line items you want to create on the authorization, use the appropriate web services to retrieve the configuration to create the line item.
   - GET /ip-line-item-configuration — Get the configuration for creating and updating an inpatient line item.
   - GET /rx-line-item-configuration — Get the configuration for creating and updating an Rx line item.
   - GET /sp-line-item-configuration/sp-service-types — Get the available service types for service/procedure line items.
   - GET /sp-line-item-configuration/{serviceTypeValue} — Get the configuration for a service type on a service/procedure line item.
5. Use the member ID and the GET /members/{memberId}/eligibilities web service to determine the member's eligibility for the authorization.
6. Search for and store the provider (or facility) to be used on the authorization. Refer to Search for a provider [231] on page 301 for more information.
7. Use the GET /diagnosis-codes web service to retrieve the diagnosis information to be used on the authorization.
8. Use the GET /procedure-codes web service to get the procedure information to be used on the authorization.
9. Use the GET /drugs web service to get the medication information to be used on the authorization.
10. (Optional) If determining one or more line items, use the GET /determination-configuration web service to retrieve the configuration for determining line items.

    Note: If Eventing is enabled for the following events (line item create, authorization create, and authorization update) and you create an authorization with two line items (one with determination information and one without determination information), then the authorization is not locked.
11. (Optional) If including a note on the new authorization, use the GET /note-definitions/{type} web service to get the definition for the type of note you want to create, then use the GET /notes- configuration/note-definition/{noteDefinitionVisibleId} web service to retrieve the configuration for the note.
12. (Optional) If including information on the next task to be created, use the GET /queues or the POST / users-search web services to retrieve the information on the appropriate queue or user to be assigned the task.
13. (Optional) If discharging the authorization at the same time as creating the authorization, use the GET / discharge-configuration web service to get the configuration for discharging an authorization.
14. (Optional) If including an international phone number or address, use the GET /countries web service to retrieve information on the supported countries.
15. (Optional) If including phone numbers on the assessment, use the GET /phone-configurations web service and the country information, if applicable, to get the configuration for phone numbers.
16. (Optional) If including addresses on the assessment, use the GET /address-configurations web service and the country information, if applicable, to get the configuration for addresses.

17. Use the member ID, the appropriate authorization information and parameters, and the POST / members/{memberId}/authorizations web service to create the authorization.

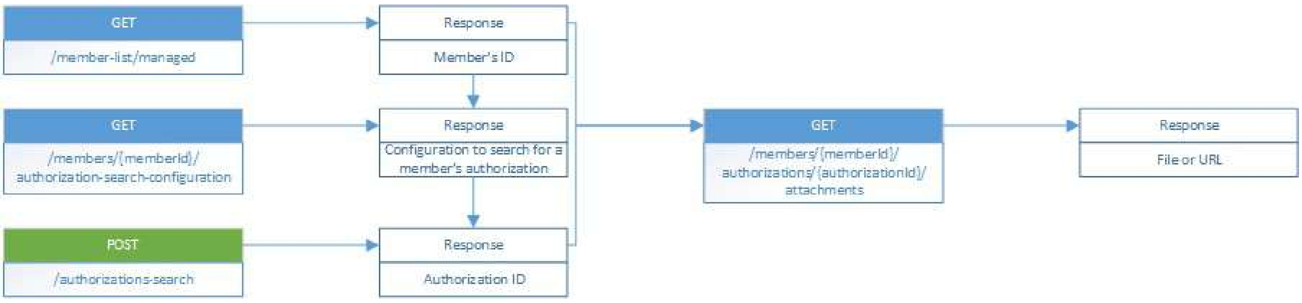
Get the attachments on an authorization

You may need to review the attachment on an authorization with the member. You need specific information to use web services to retrieve the attachments on a member's authorization.

To retrieve the attachments, you need the following information:

- Member ID
- Authorization ID

The following graphic shows how to use web services to retrieve the attachments on a member's authorization.



1. Retrieve the member ID to retrieve the authorization ID and the associated attachments.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that has the attachments you want to review.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/ authorizations/

{authorizationId}/attachments web service to retrieve the attachments on an authorization.

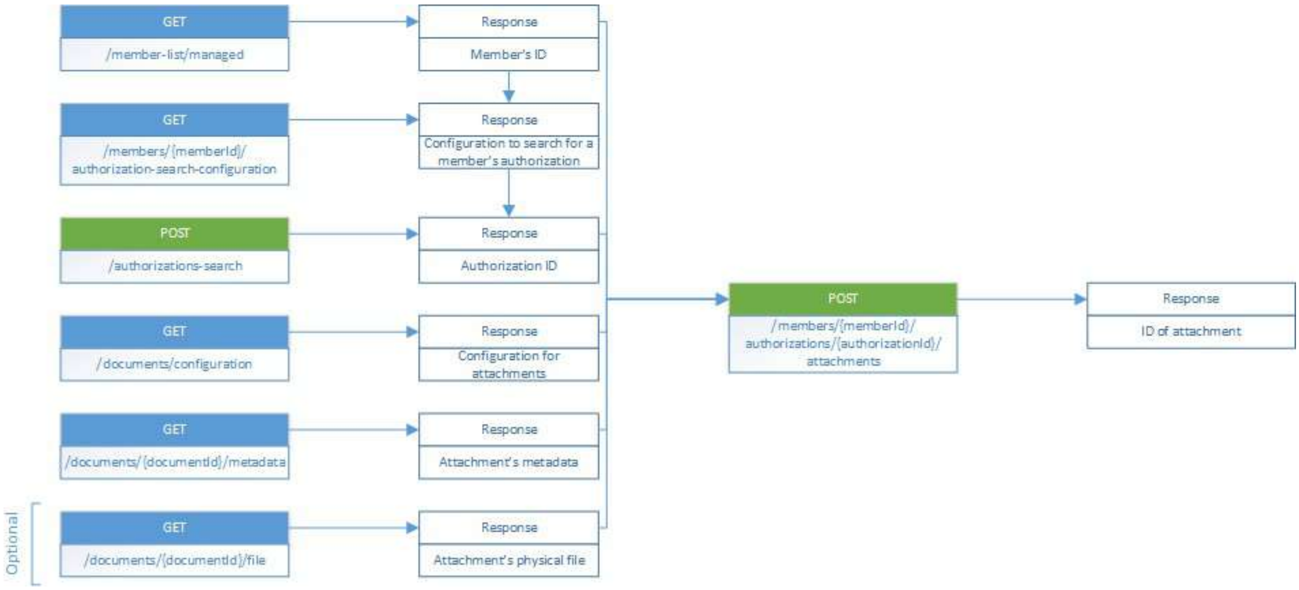
Create an attachment on an authorization

You may need to create or add an attachment, for example, an image of an x-ray, to an authorization after reviewing the authorization with the member. You need specific information to create an attachment on a member's authorization.

To create an attachment, you need the following information:

- Member ID
- Authorization ID
- Configuration for attachments
- Attachment's metadata
- Physical file of the attachment (optional)

The following graphic shows how to use web services to create an attachment on a member's authorization.



1. Retrieve the member ID to be used to retrieve the authorization ID and to create the attachment.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that needs the attachment.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the GET /documents/configuration web service to retrieve the configuration to create an attachment.
6. Use the ID of the attachment and the GET /documents/{documentId}/metadata web service to retrieve metadata of the attachment.
7. (Optional) If attaching a physical file (instead of a URL), use the attachment's ID and the GET / documents/{documentId}/file web service to retrieve the physical file.
8. Use the member ID, the authorization ID, the attachment's metadata, the physical file (if applicable), and the POST /members/{memberId}/authorizations/{authorizationId}/ attachments web service to create an attachment.

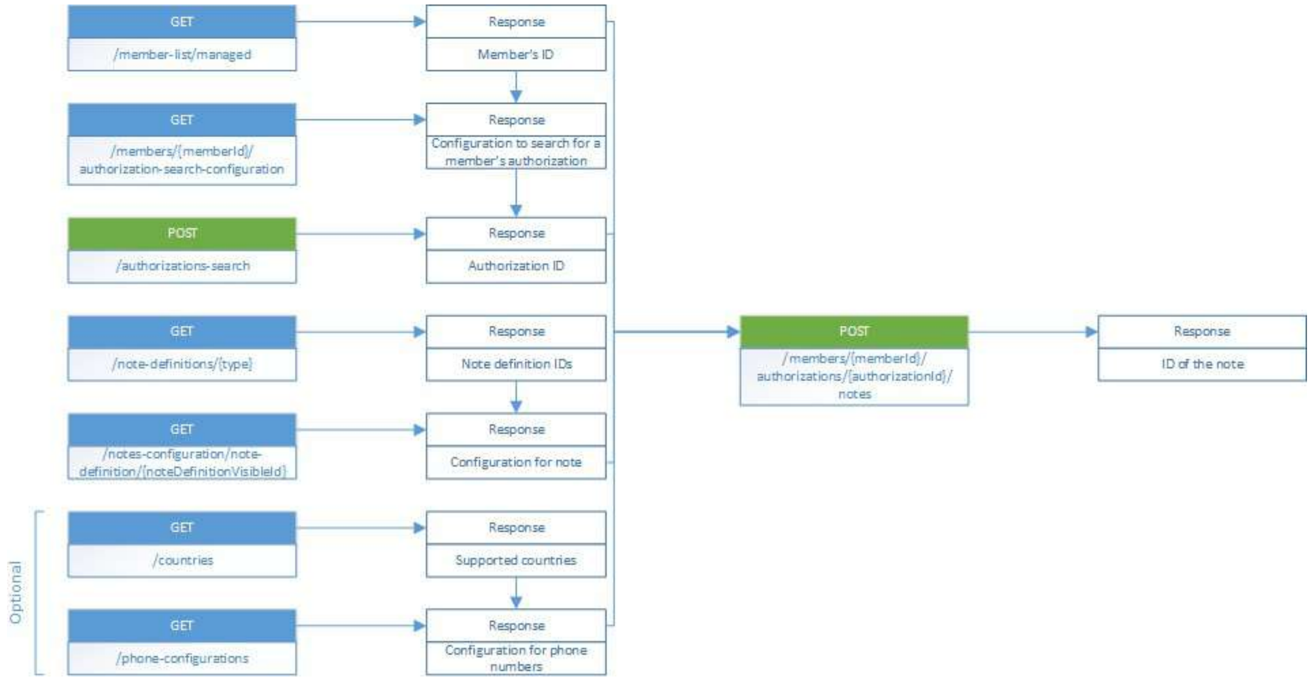
Create a note on an authorization

After creating or reviewing an authorization with the member, you may need to add or create a note on the authorization. You need specific information to use web services to create a note on a member's authorization.

You need the following information to create a note on an authorization:

- Member ID
- Authorization ID
- Definition of the note to be created
- Configuration for the note
- Information on supported countries (optional)
- Configuration for phone numbers (optional)

The following graphic shows how to use web services to create a note on a member's authorization.



1. Retrieve the member ID to retrieve the authorization and to create the note.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to update with a note.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the GET /note-definitions/{type} web service to retrieve the definition based on the type of note you want to create.
6. Store the visible ID of the note you want to create.
7. Retrieve the configuration for the note you want to create using the note's visible ID and the GET / notes-configuration/note-definition/{noteDefinitionVisibleId} web service.
8. (Optional) If including an international phone number, use the GET /countries web service to retrieve information on the supported countries.
9. (Optional) If including phone numbers on the assessment, use the GET /phone-configurations web service and the country information, if applicable, to get the configuration for phone numbers.
10. Use the member ID, the authorization ID, the note's information, and the POST /members/{member Id}/authorizations/{authorizationId}/notes web service to create the note on the authorization.

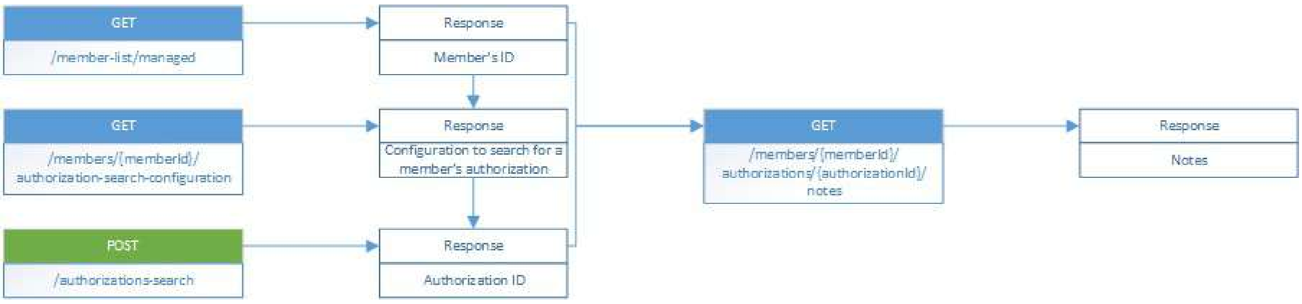
Get the notes on an authorization

You may need to review the notes that were previously recorded on an authorization with the member. You need specific information to use web services to retrieve the notes on a member's authorization.

You need the following information to retrieve the notes on an authorization:

- Member ID
- Authorization ID

The following graphic shows how to use web services to retrieve the notes on a member's authorization.



1. Retrieve the member ID to retrieve the notes on an authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that has the notes you want to review.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/ authorizations/

{authorizationId}/notes web service to retrieve the notes on the authorization.

Authorization locking

You can update an entire authorization at one time with the PUT /members/{memberId}/ authorizations/{authorizationId} web service. When doing so you can also provide determination information, but know that this can cause problems if the authorization is locked.

Specifically, when authorization locking and eventing are enabled, you get different results for locked authorizations and triggered events from using the PUT web service or the granular determination web service.

Notice the behavior of authorization locking and eventing when the PUT web service and the granular determination web service are in play.

- If you resubmit the same data (no changes made) using the PUT web service, the authorization version is updated: two (2) is added to the existing version number. The authorization remains locked, and any associated events are triggered.
- If you update only the determination information using the PUT web service, the authorization version is updated: two (2) is added to the existing version number. The authorization remains locked, and any associated events are triggered.
- If you resubmit the same data (no changes made) or you update only the determination information using the granular determination web service, the authorization version is updated: two (2) is added to the existing version number. the authorization is no longer locked, and no associated events are triggered.
- If you resubmit the same data (no changes made) in TruCare, the authorization version is updated: one (1) is added to the existing version number. The authorization remains locked, and any associated events are triggered.
- If you update only the determination information in TruCare, the authorization version is updated: two (2) is added to the existing version number. The authorization is no longer locked, and no associated events are triggered.

ation

Authoriz	PUT			Granular endpoint for determination			TruCare (editable)		
Action Item	*Version Update*	*Locking*	*Eventing*	*Version Update*	*Locking*	*Eventing*	*Version Update*	*Locking*	*Eventing*
No updates sent (resubmis of the same data)	Yes (+2) sion	Yes	Yes	Yes (+2)	No	No	Yes (+1)	Yes	Yes
Only determina informatio updated	Yes (+2) tion n	Yes	Yes	Yes (+2)	No	No	Yes (+2)	No	No

Note: Use the granular endpoint to update determination information for an authorization.

Topics in this section

Delete a lock on an authorization (option one)

To unlock an authorization, you need the authorization ID and the member ID. There are two ways to obtain those IDs to unlock the authorization. The first way to retrieve the information needed to delete the lock on an authorization is through a third-party.

Delete the lock on an authorization (option two)

To unlock an authorization, you need the authorization ID and the member ID. There are two ways to obtain those IDs to unlock the authorization. You can use web services to retrieve the authorization and delete the lock on the same authorization.

Update an authorization

You may need to update an entire authorization after a discussion with the member. You need specific information to use the web services to update a member's authorization.

To update an authorization, you need the following information:

- Member ID
- Authorization ID
- Details on the existing authorization
- Supported countries (optional)
- Configuration for addresses (optional)
- Configuration for phone numbers (optional)
- Configuration for determinations (optional)
- Diagnosis codes
- Medications
- Configuration for inpatient authorizations, if updating an inpatient authorization
- Configuration for inpatient line items, if updating inpatient line items

- Member's eligibility information
- Note definitions and configuration to create a note (optional)
- Procedure codes
- Queue names (optional)
- Configuration for service/procedure authorizations, if updating a service procedure authorization
- Information on the available service types and the associated configuration information
- Configuration for Rx line items, if updating an Rx line item
- Provider information, if adding or updating providers or facilities on the authorization The following graphic shows how to use web services to update a member's authorization.

1. Retrieve the member ID to be used to retrieve and update the authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Retrieve the authorization ID that you want to update.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Retrieve the details on the existing authorization using the GET /members/{memberId}/authorizations/{authorizationId} web service.

   Refer to Get the details on the member's authorization [75] on page 101 for more information.
6. (Optional) If adding or updating international phone numbers or addresses on the authorization, use the

   GET /countries web service to retrieve the supported countries.
7. (Optional) If adding or updating phone information, use the GET /phone-configurations web service and the country information, if applicable, to return the configuration for phone numbers.
8. (Optional) If adding or updating address information, use the GET /address-configuration web service and the country information, if applicable, to return the configuration for addresses.
9. (Optional) If adding or updating the determination on the line items, use the GET /determination- configuration web service to return the configuration for determinations.
10. (Optional) If adding or updating the diagnosis information, use the GET /diagnosis-codes web service to return the appropriate diagnosis information to be used on the authorization.
11. (Optional) If adding or updating the medication information, use the GET /drugs web service to return the appropriate medication information to be used on the authorization.
12. (Optional) If updating an inpatient authorization, use the GET /inpatient-authorization-configuration web service and the GET /inpatient-authorization-configuration/bhp-configuration web service to get the configuration.
13. (Optional) If updating inpatient line items on an authorization, use the GET /ip-line-item-configuration web service to retrieve the configuration for inpatient line items.
14. Use the GET /members/{memberId}/eligibilities web service to retrieve the member's eligibility information.
15. (Optional) If adding a note to the authorization, use the GET /note-definitions/{type} web service and the GET /notes-configuration/note-definition/{noteDefinitionVisibleId} web service to retrieve the available note types, then to retrieve the configuration information to create the note.
16. (Optional) If adding or updating the procedure codes, use the GET /procedure-codes web service to retrieve the appropriate procedure code to be used on the authorization.
17. (Optional) If assigning any resulting tasks to a queue, use the GET /queues web service to retrieve the available queues.
18. (Optional) If updating a service/procedure authorization, use the GET /service-procedure-authorization-configuration web service and the GET /service-procedure-

    authorization-configuration/bhp-configuration web service to retrieve configuration for service/procedure authorizations.
19. (Optional) If adding or updating a service/procedure line item, use the GET /sp-line-item-configuration/sp-service-types web service and the GET /sp-line-item-configuration/

    {serviceTypeValues} web service to retrieve the available service types and the corresponding configuration information.

20. (Optional) If adding or updating an Rx line item, use the GET /rx-line-item-configuration web service to retrieve the configuration.
21. (Optional) If adding or updating a provider (requesting provider, servicing provider, or servicing facility), search for the appropriate provider to use on the authorization.

    Refer to Search for a provider [231] on page 301 for more information.
22. Use the member ID, the information that is to be updated on the authorization, and the PUT /members/

{memberId}/authorizations/{authorizationId} web service to update the authorization.

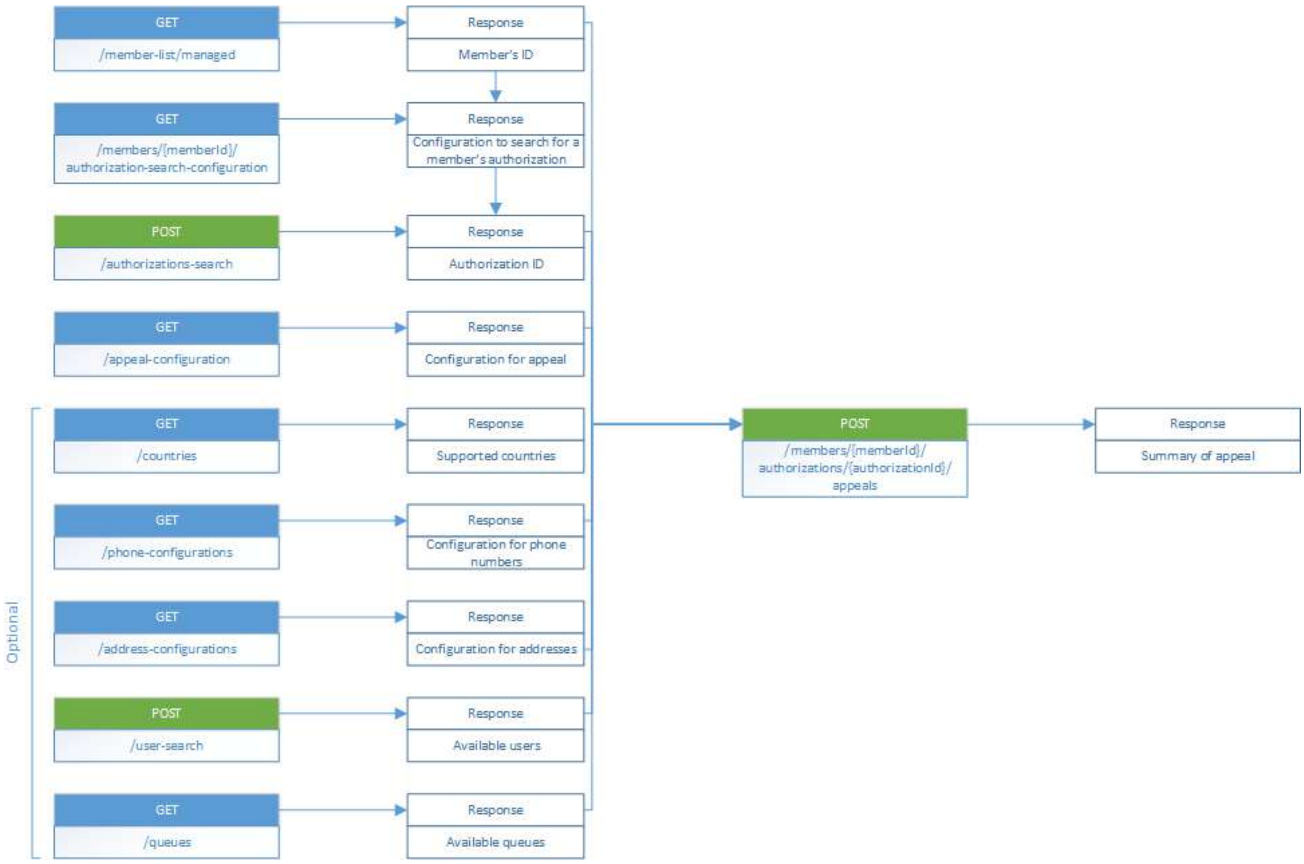
Create an appeal on an authorization

You may need to create an appeal on an authorization after reviewing the determination with the member. To create an appeal, you can use web services. You need specific information to use web services to create an appeal on a member's authorization.

To create an appeal, you need the following information:

- Member ID
- Authorization ID
- Configuration to create an appeal
- Information on the supported countries (optional)
- Configuration for addresses (optional)
- Configuration for phone numbers (optional)
- Information on a user or queue (optional)

The following graphic shows how to use web services to create an appeal on a member's authorization.



1. Retrieve the member ID to be used to retrieve and update the authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.

2. Store the member ID.
3. Search for the authorization that needs to be appealed.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the GET /appeal-configuration web service to get the configuration to create an appeal.
6. (Optional) If including international addresses or phone numbers, use the GET /countries web service to get the information on the supported countries.
7. (Optional) If including addresses on the appeal, use the GET /address-configurations web service and the country information, if applicable, to get the configuration to create an address.
8. (Optional) If including phone numbers on the appeal, use the GET /phone-configurations web service and the country information, if applicable, to get the configuration to create a phone number.
9. Use the member ID, the authorization ID, the appeal information, and the POST /members/{member Id}/authorizations/{authorizationId}/appeals web service to create an appeal on the authorization.

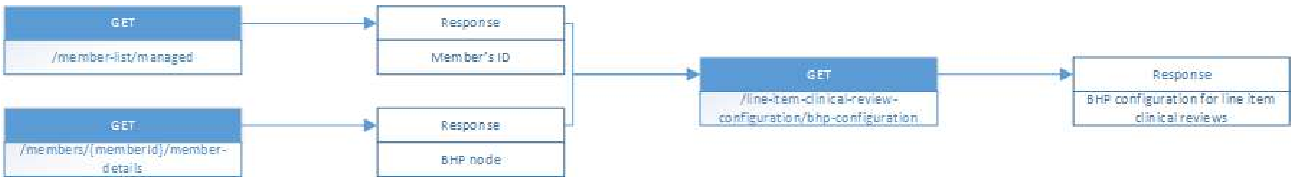
Get the BHP configuration for line item clinical reviews

You can get a member's BHP configuration for line item clinical reviews using web services.

To get the BHP configuration, you need the following information:

- Member's ID
- BHP node

The following graphic shows how to use web services to retrieve the BHP configuration for line item clinical reviews.



1. Retrieve the member's ID.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/member-details web service to retrieve the member's BHP node.
4. Store the member's BHP node.
5. Use the member's BHP node and the GET /line-item-clinical-review-configuration/bhp-configuration web service to retrieve the configuration for line item clinical reviews for the member's BHP node.

Get the configuration for creating a line item clinical review

You can retrieve the configuration for creating a line item clinical review using web services. To retrieve the configuration, you do not need any specific information.

The following graphic shows how to use web services to retrieve the configuration for creating a line item clinical review.

Use the GET /line-item-clinical-review-configuration web service to retrieve the configuration for creating a line item clinical review.

Get the configuration for creating a line item advisor review

You can retrieve the configuration for creating a line item advisor review using web services. To retrieve the configuration, you do not need any specific information.

The following graphic shows how to use web services to retrieve the configuration for creating a line item advisor review.

Use the GET /line-item-advisor-review-configuration web service to retrieve the configuration for creating a line item advisor review.

Create a line item clinical review on an authorization

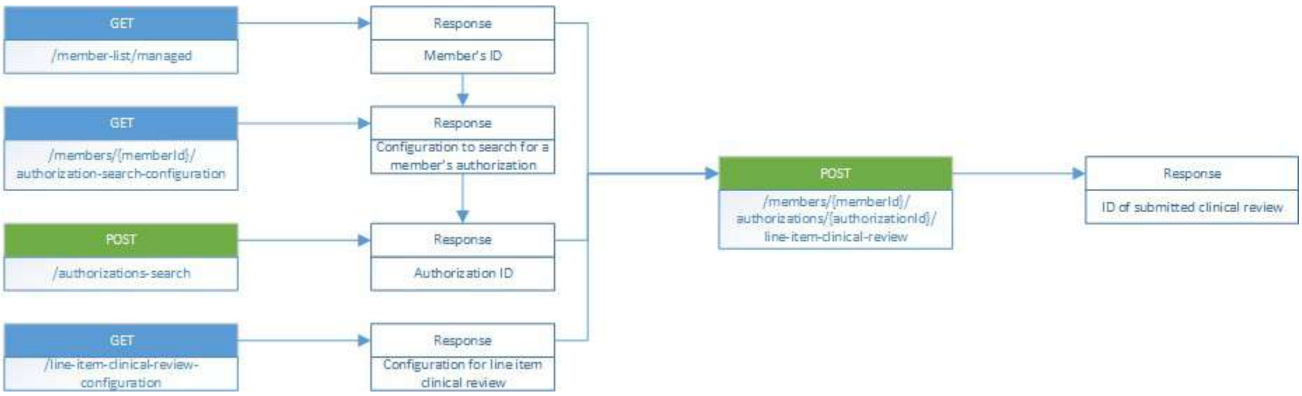
You can create a clinical review on an authorization line item using web services.

To create a clinical review on an authorization line item, you need the following information:

- Member ID
- Authorization ID
- Configuration to create a line item clinical review

The line item(s) the review is associated with is indicated in the 'lineItemNumbers' array inside the body of the request. The request contains the review itself, the possibility to claim and complete the review task ('claimReviewTask'), and a 'nextTask' object.

The following graphic shows how to use web services to create a clinical review on an authorization line item.



1. Retrieve the member ID to be used to retrieve and review the authorization.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.
3. Search for the authorization that needs to be reviewed.

   Refer to Search for a member's authorization [75] for more information.
4. Store the ID of the authorization.

5. Use the GET /line-item-clinical-review-configuration web service to retrieve the configuration to create a line item clinical review.
6. Use the member ID, the authorization ID, the clinical review configuration, and the POST /members/

{memberId}/authorizations/{authorizationId}/line-item-clinical-review web service to create a clinical review on the authorization line item.

Create a line item advisor review on an authorization

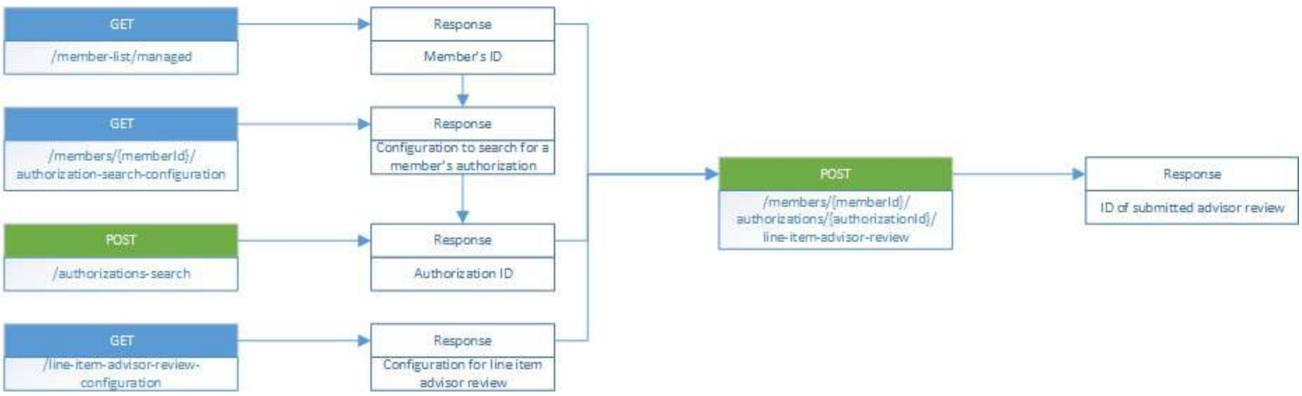
You can create an advisor review on an authorization line item using web services.

To create an advisor review on an authorization line item, you need the following information:

- Member ID
- Authorization ID
- Configuration to create a line item advisor review

The line item(s) the review is associated with is indicated in the 'lineItemNumbers' array inside the body of the request. The request contains the review itself, the possibility to claim and complete the review task ('claimReviewTask'), and a 'nextTask' object.

The following graphic shows how to use web services to create an advisor review on an authorization line item.



1. Retrieve the member ID to be used to retrieve and review the authorization.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.
3. Search for the authorization that needs to be reviewed.

   Refer to Search for a member's authorization [75] for more information.
4. Store the ID of the authorization.
5. Use the GET /line-item-advisor-review-configuration web service to retrieve the configuration to create a line item advisor review.
6. Use the member ID, the authorization ID, the advisor review configuration, and the POST /members/

{memberId}/authorizations/{authorizationId}/line-item-advisor-review web service to create an advisor review on the authorization line item.

Birth Events

You can use web services to interact with a member's birth event records.

The following sections describe how to use web services to interact with the member's birth event. For example, with the correct permissions, you can use the web services to return birth event records, create a birth event record, or edit a birth event record.

Topics in this section

Get a summary of the member's birth events [97]

You may need to get a summary of a member's birth events to review them with the member. You need specific information to use web services to retrieve a summary of the member's birth events.

Get the details on a birth event [97]

You may need to review a birth event with a member. You need specific information to use web services to retrieve the details on a member's birth event.

Create a birth event [98]

You may need to create a birth event after a discussion with the member. You need specific information to use web services to create a birth event for a member.

Update a birth event [98]

You may need to update a birth event after reviewing it with the member. You need specific information to use web services to update a member's birth event.

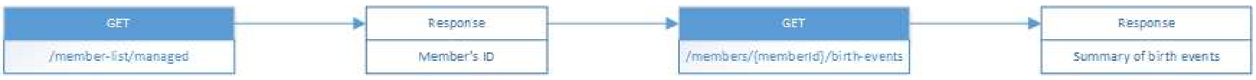
Get a summary of the member's birth events

You may need to get a summary of a member's birth events to review them with the member. You need specific information to use web services to retrieve a summary of the member's birth events.

To get a summary of a member's birth events, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a summary of a member's birth events.



1. Retrieve the member ID to be used to retrieve the summary.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/birth-events web service to retrieve the summary of the member's birth events.

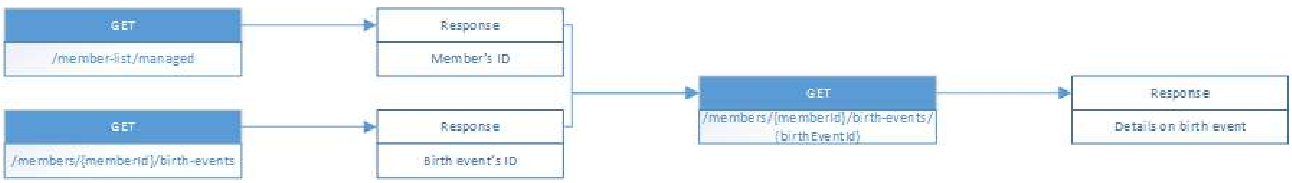
Get the details on a birth event

You may need to review a birth event with a member. You need specific information to use web services to retrieve the details on a member's birth event.

To get the details on a birth event, you need the following information:

- Member ID
- Birth event ID

The following graphic shows how to use web services to retrieve the details on a member's birth event.



1. Retrieve the member ID to be used to retrieve the birth event.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/birth-events web services to retrieve a summary of the member's birth events.
4. Store the ID of the birth event.
5. Use the member ID, the birth event ID, and the GET /members/{memberId}/birth-events/{birth EventId} web service to get the details on the birth event.

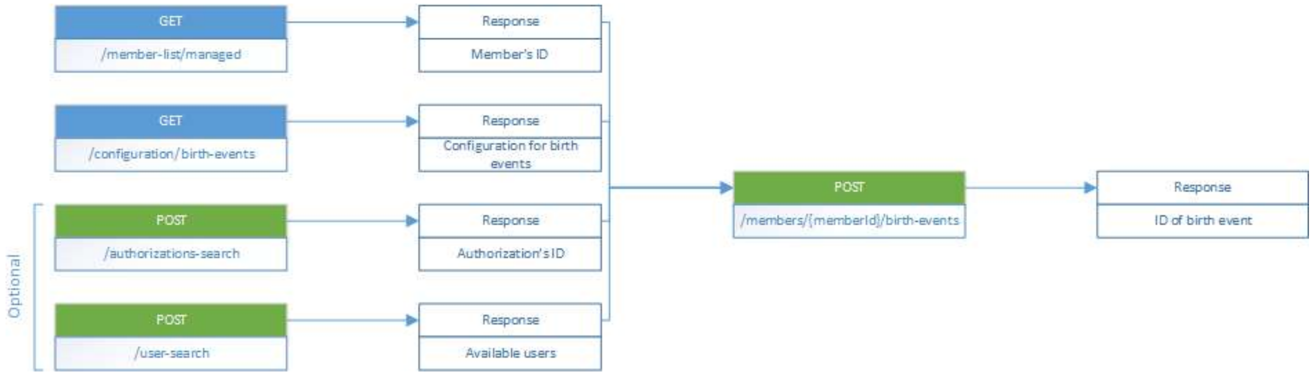
Create a birth event

You may need to create a birth event after a discussion with the member. You need specific information to use web services to create a birth event for a member.

To create a birth event, you need the following information:

- Member ID
- Configuration to create a birth event
- Information on the associated authorization (optional)
- Information on the user who created the birth event (optional)

The following graphic shows how to use web services to create a birth event for a member.



1. Retrieve the member ID to be used to create the birth event.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.
3. Use the GET /configuration/birth-events web service to get the configuration to create a birth event.
4. (Optional) Search for the authorization that should be associated with the birth event. Refer to Search for a member's authorization [75] for more information.
5. (Optional) If a different user should be indicated to have created the birth event, search for the appropriate user.

   Refer to Search for a user [297] for more information.
6. Use the member ID, the birth event configuration, and the POST /members/{memberId}/birth- events web service to create the birth event.

Update a birth event

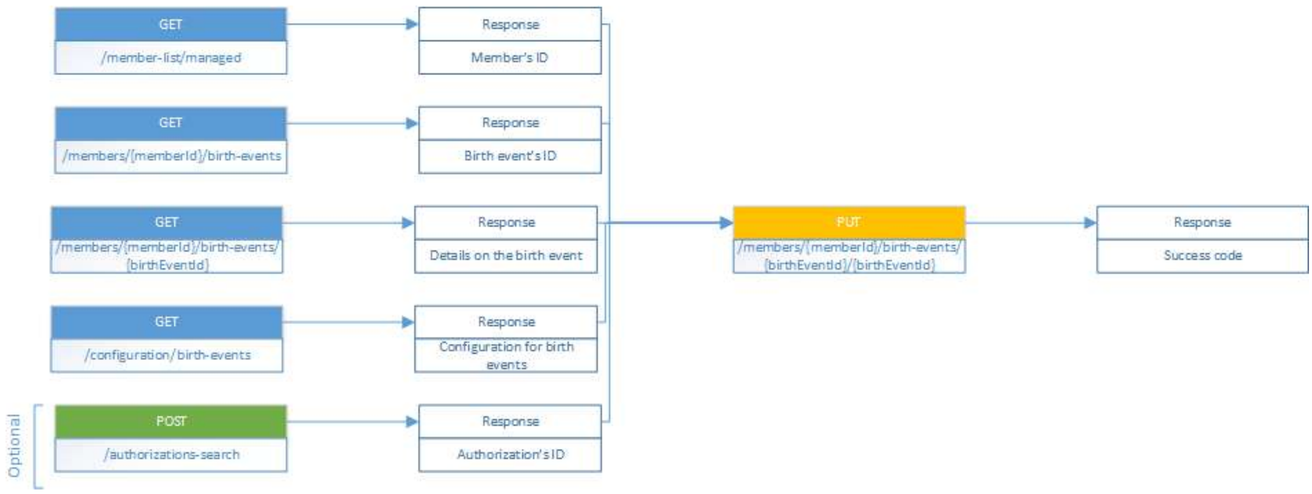
You may need to update a birth event after reviewing it with the member. You need specific information to use web services to update a member's birth event.

To update a birth event, you need the following information:

- Member ID

- Birth event ID
- Details on the existing birth event
- Configuration to update a birth event
- Authorization ID (optional)

The following graphic shows how to use web services to update a member's birth event.



1. Retrieve the member ID to be used to retrieve and update the birth event.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/birth-events web service to retrieve a summary of the member's birth events.
4. Store the ID of the birth event to be updated.
5. Use the member ID, the birth event ID, and the GET /members/{memberId}/birth-events/{birth EventId} web service to get the details on the birth event.
6. Use the GET /configuration/birth-events web service to get the configuration to update the birth event.
7. (Optional) Search for the authorization that should be associated with the birth event. Refer to Search for a member's authorization [75] on page 101 for more information.
8. Use the member ID, the birth event ID, the updated information, and the PUT /members/{memberId}/ birth-events/{birthEventId} web service to update the birth event.

Care opportunity

You may need to use web services to interact with a member's risk indicator information when integrating with third-party risk analysis and outreach applications.

The following sections describe how to use web services to interact with a member's care opportunity information. For example, you can use web services to retrieve, to create, and to update a member's risk indicator information.

Topics in this section

Get risk indicators [100]

You may need to review the member's risk indicator with the member. You need specific information to use web services to retrieve the member's risk indicators.

Get the history of a risk indicator [100]

You may need to review the history of the member's risk indicator. You need specific information to use web services to retrieve the history of a member's risk indicator.

Create a risk indicator [101]

You may need to add to the member's risk indicator list. You need specific information to use web services to create a risk indicator for the member.

Update a member's risk indicator list [101]

You may need to update the member's risk indicator list after reviewing the list with the member. You need specific information to use web services to update the member's risk indicator list.

Get risk indicators

You may need to review the member's risk indicator with the member. You need specific information to use web services to retrieve the member's risk indicators.

To get the risk indicators, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a member's risk indicators.

1. Retrieve the member ID to be used to retrieve the risk indicators.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/care-opportunity/risk-indicators

web services to retrieve the member's risk indicators.

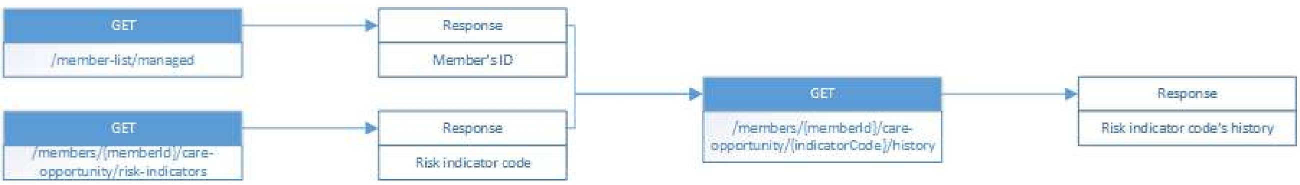
Get the history of a risk indicator

You may need to review the history of the member's risk indicator. You need specific information to use web services to retrieve the history of a member's risk indicator.

To get the risk indicator's history, you need the following information:

- Member ID
- Indicator code

The following graphic shows how to use web services to retrieve the history of a member's risk indicator.



1. Retrieve the member ID to be used to retrieve the risk indicators.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/care-opportunity/risk-indicators

   web service to retrieve the member's risk indicators.
4. Store the risk indicator code.
5. Use the member ID, the risk indicator code, and the GET /members/{memberId}/care-opportunity/{indicatorCode}/history web service to get the history of the member's risk indicator.

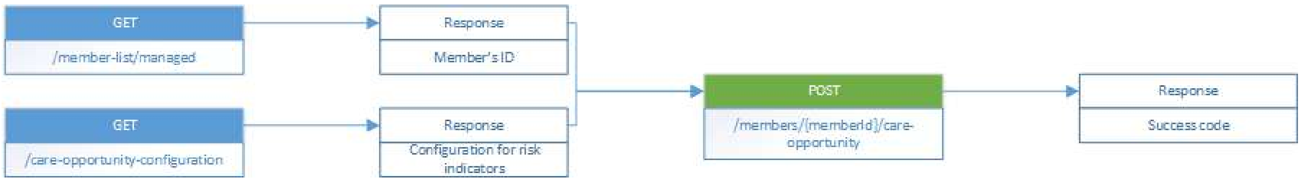
Create a risk indicator

You may need to add to the member's risk indicator list. You need specific information to use web services to create a risk indicator for the member.

To create a risk indicator, you need the following information:

- Member ID
- Configuration to create a risk indicator

The following graphic shows how to use web services to create a risk indicator for a member.



1. Retrieve the member ID to be used to create the risk indicator.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the GET /care-opportunity-configuration web service to get the configuration to create a risk indicator.
4. Use the member ID, the information for the risk indicator, and the POST /members/{memberId}/ care-opportunity web service to create the risk indicator.

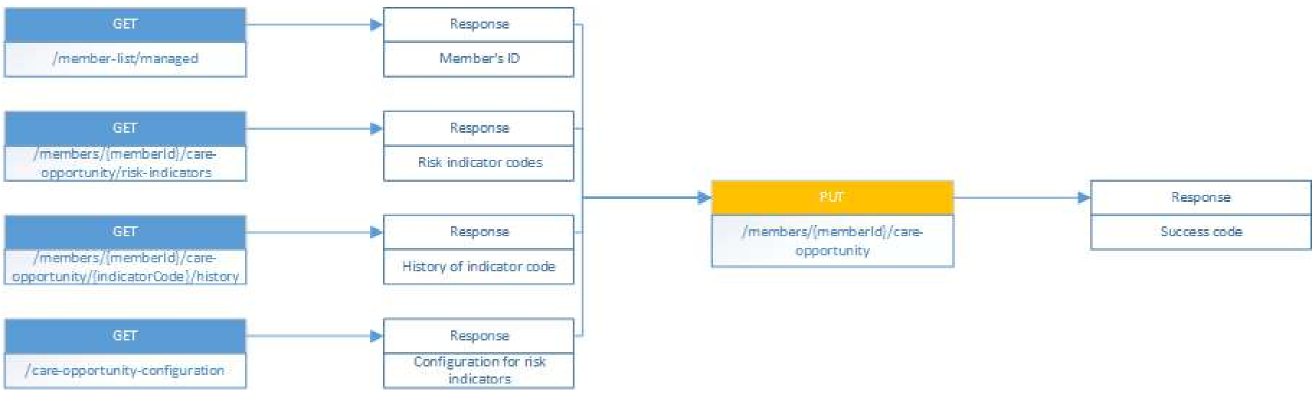
Update a member's risk indicator list

You may need to update the member's risk indicator list after reviewing the list with the member. You need specific information to use web services to update the member's risk indicator list.

To update the risk indicator list, you need the following information:

- Member ID
- Member risk indicators
- History of the risk indicator
- Configuration to update the risk indicator

The following graphic shows how to use web services to update a member's risk indicator list.



1. Retrieve the member ID to be used to update the risk indicator list.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/care-opportunity/risk-indicators web service to retrieve the member's risk indicators.

4. Store the risk indicator code.
5. Use the member ID, the risk indicator code, and the GET /members/{memberId}/care-opportunity/{indicatorCode}/history web service to get the history of the member's risk indicator.
6. Use the GET /care-opportunity-configuration web service to get the configuration to update a risk indicator.
7. Store the risk indicator information to be used to update the risk indicator list.
8. Use the member ID, the risk indicator to be updated, and the PUT /members/{memberId}/care- opportunity web service to update the risk indicator list.

Care plans

You can use web services to interact with a member's care plan information.

The following describes how to use web services to interact with a member's case plans. For example, you can retrieve the details on a care plan, to retrieve all the care plan problems, and to retrieve all of the care plan problems.

Topics in this section

You may need to review the member's care plans with the member. You need certain information to use web services to retrieve a summary of a member's care plans.

You can review the details of a care plan with a member. These details include the care plan element custom recommendation status.

You may need to review all of the problems on the care plans with a member. You need certain information to use web services to retrieve all problems on all the member's care plans.

You may need to review all the objectives on the care plans with the member. You need certain information to use web services to retrieve all objectives on all of a member's care plans.

You may need to review all of the actions on the care plans with a member. You need certain information to use web services to retrieve all actions on all of a member's care plans.

You may need to review the history of a care plan with a member. You can retrieve the history on the care plan using web services.

You may need to review the member's acknowledgments with the member. You need certain information to use web services to retrieve the acknowledgments on a member's care plan.

You may need to review the notes on a care plan with a member. You need specific information to use web services to retrieve the notes on a member's care plan.

You can create a care plan for a member.

You can create a draft care plan for a member.

Update a draft care plan [109]

You can update a draft care plan for a member.

Create a care plan from the builder [110]

You can create a care plan for the member based on care plan elements sent to the care plan builder.

Update a care plan from the builder [111]

You can update an existing care plan from the care plan builder.

Search the care plan's problems [113] You can search the care plan's problems.

Search the care plan's objectives [113] You can search the care plan's objectives.

Search the care plan's actions [113] You can search the care plan's actions.

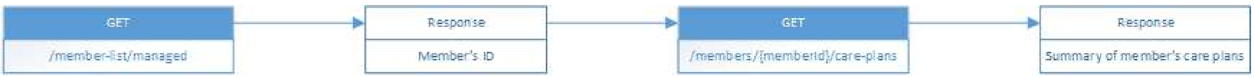
Get a summary of a member's care plans

You may need to review the member's care plans with the member. You need certain information to use web services to retrieve a summary of a member's care plans.

To get the care plan summary, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a summary of a member's care plans.



1. Retrieve the member ID to be used to retrieve the member's care plan summary.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/care-plans web service to get the care plan summary.

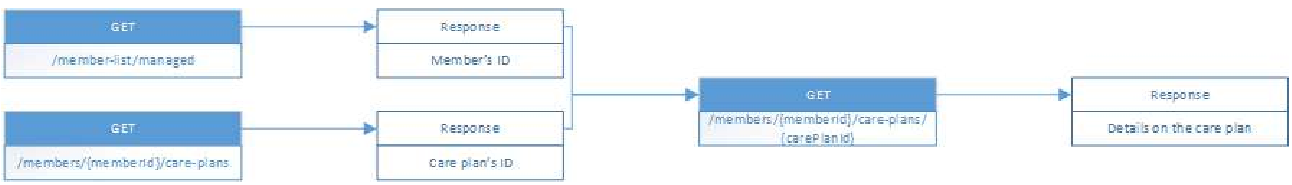
Get the details on a member's care plan

You can review the details of a care plan with a member. These details include the care plan element custom recommendation status.

To get the details on the care plan, you need the following information:

- Member ID
- Member ID type - defaults to internal
- Care plan ID
- Status - defaults to all

The following graphic shows how to use web services to retrieve the details on all a member's care plans.



1. Retrieve the member ID to be used to retrieve the details.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.

2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/care-plans web service to get a summary of the member's care plans.
4. Store the ID of the care plan.
5. Use the member ID, the care plan ID, and the GET /members/{memberId}/care-plans/{carePlanId} web service to get the details on the care plan, including the care plan element custom recommendation status.

Get all the care plan problems

You may need to review all of the problems on the care plans with a member. You need certain information to use web services to retrieve all problems on all the member's care plans.

To get all the problems, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve all problems on all a member's care plans.

1. Retrieve the member ID to be used to get the care plan problems.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/care-plans/problems web service to get all problems on all the member's care plans.

Get all the care plan objectives

You may need to review all the objectives on the care plans with the member. You need certain information to use web services to retrieve all objectives on all of a member's care plans.

To get all of the objectives, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve all objectives on all a member's care plans.

1. Retrieve the member ID to be used to get all the objectives.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/care-plans/objectives web service to get all the care plan's objectives.

Get all the care plan actions

You may need to review all of the actions on the care plans with a member. You need certain information to use web services to retrieve all actions on all of a member's care plans.

To get all the actions, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve all actions on all the member's care plans.

1. Retrieve the member ID to be used to retrieve all the actions.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/care-plans/actions web service to get all actions on all of the member's care plans.

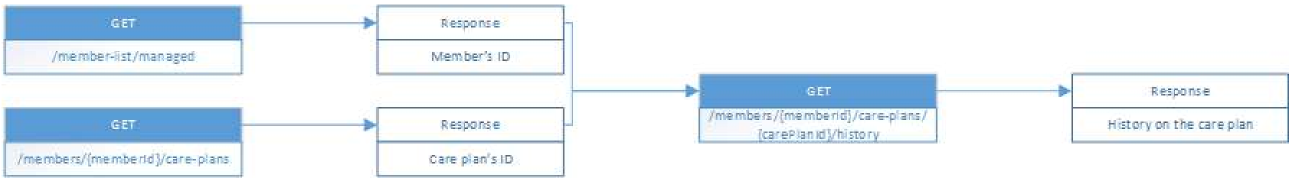
Get the history on a care plan

You may need to review the history of a care plan with a member. You can retrieve the history on the care plan using web services.

To get the care plan's history, you need the following information:

- Member ID
- Care plan ID

The following graphic shows how to use web services to retrieve the history on a member's care plan.



1. Retrieve the member ID to be used to get the care plan's history.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/care-plans web service to get a summary of the member's care plans.
4. Store the ID of the care plan.
5. Use the member ID, the care plan ID, and the GET /members/{memberId}/care-plans/{carePlanId}/history web service to get the history of the care plan.

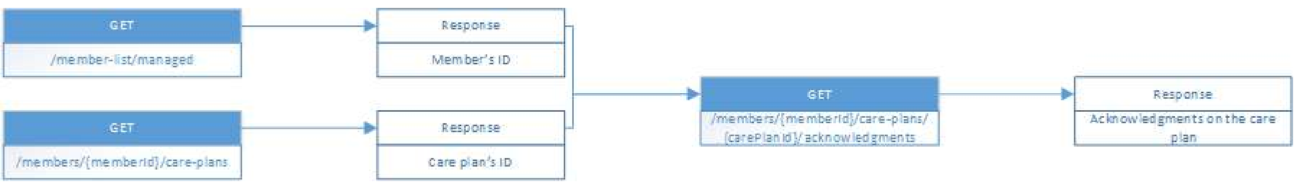
Get the acknowledgments on a care plan

You may need to review the member's acknowledgments with the member. You need certain information to use web services to retrieve the acknowledgments on a member's care plan.

To get the acknowledgments on a care plan, you need the following information:

- Member ID
- Care plan ID

The following graphic shows how to use web services to retrieve the acknowledgments on a member's care plan.



1. Retrieve the member ID to be used to retrieve the care plan and its associated acknowledgements.

Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.

2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/care-plans web services to get a summary of the member's care plans.
4. Store the ID of the care plan.
5. Use the member ID, the care plan ID, and the GET /members/{memberId}/care-plans/{carePlanId}/acknowledgments web service to get the acknowledgments on the care plan.

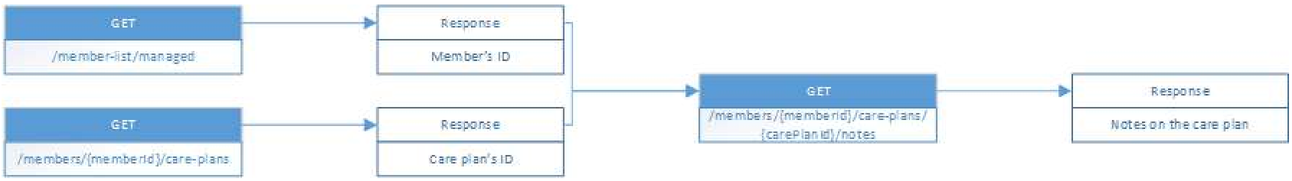
Get the notes on a care plan

You may need to review the notes on a care plan with a member. You need specific information to use web services to retrieve the notes on a member's care plan.

To get the notes, you need the following information:

- Member ID
- Care plan ID

The following graphic shows how to use web services to retrieve the notes on a member's care plan.



1. Retrieve the member ID to be used to retrieve the care plan.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/care-plans web service to get a summary of the member's care plans.
4. Store the ID of the care plan.
5. Use the member ID, the care plan ID, and the GET /members/{memberId}/care-plans/{carePlanId}/notes web service to get the notes on the care plan.

Create a Care Plan

You can create a care plan for a member.

To create a new care plan, you must provide an existing case and a condition. If you supply a care plan name that is equal to the name of an existing published condition definition, the condition for the care plan is linked with the matching condition definition. If a matching published condition definition does not exist, a custom condition without a link to an existing condition definition is created.

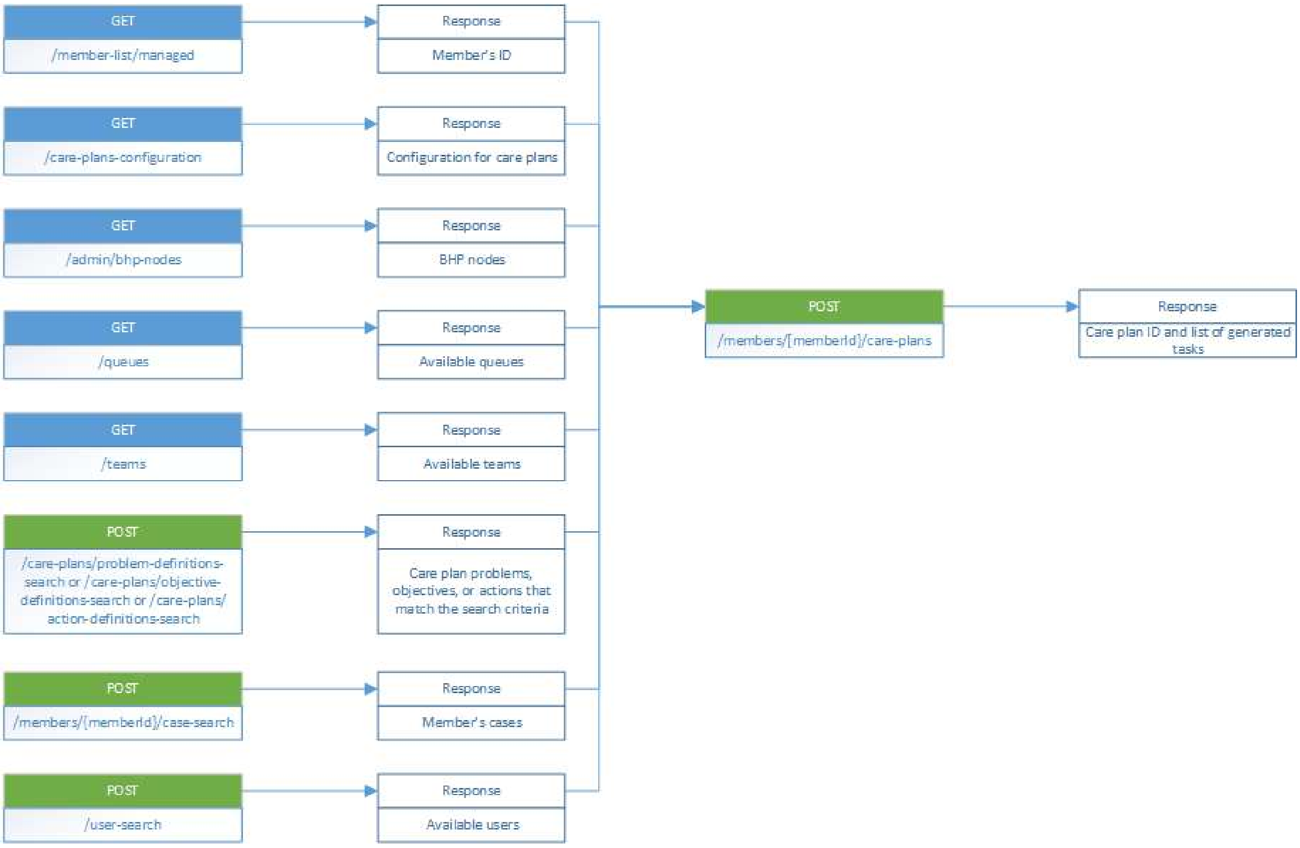
Each care plan may contain sets of care plan elements. A care plan can contain problems, objectives, and actions. A problem can contain objectives and actions. Objectives can contain actions. An objective can be a goal or an outcome. An action can be a task, assessment, intervention, service request, or a text action. Each care plan element can be created from an existing definition or can be custom (no link to a definition). When creating a care plan element from the definition, you must specify a valid definition ID, which represents the definition of the care plan element you are creating. The care plan element inherits the name, description, and other fields from the definition depending on the element type. You provide the rest of the values in the request. If you are creating a custom care plan element, leave the definitionId empty and all values, including the name and the description, of the new care plan element are taken from the request.

When you indicate the web service should create a task, the web service creates the task when you submit the request and you set the field to submit the care plan as true.

To create a care plan, you need the following information:

- Member ID
- Care plan configuration and element data or definition

The following graphic shows how to use web services to create a care plan.



1. Retrieve the member ID to be used to retrieve the member's care plan summary.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. You can use the GET /care-plans-configuration web service to get the configuration for care plans.
4. You can use the GET /admin/bhp-nodes web service to get information on the available BHP nodes.
5. You can use the GET /queues web service to get information on the available queues.
6. You can use the GET /teams web service to get information on the available teams.
7. If you need to search for care plan problems, use the POST /care-plans/problem-definitions- search web service.
8. If you need to search for care plan objectives, use the POST /care-plans/objective-definitions-search web service.
9. If you need to search for care plan actions, use the POST /care-plans/action-definitions-search web service.
10. If you need to search for a case, use the POST /members/{memberId}/case-search web service.
11. If you are not the primary or secondary owner, you can search for the appropriate user. Refer to Search for a user [297] on page 387 for more information.
12. Use the member ID, the care plan information, and the POST /members/{memberId}/care-plans

web service to create the care plan.

Create a draft care plan

You can create a draft care plan for a member.

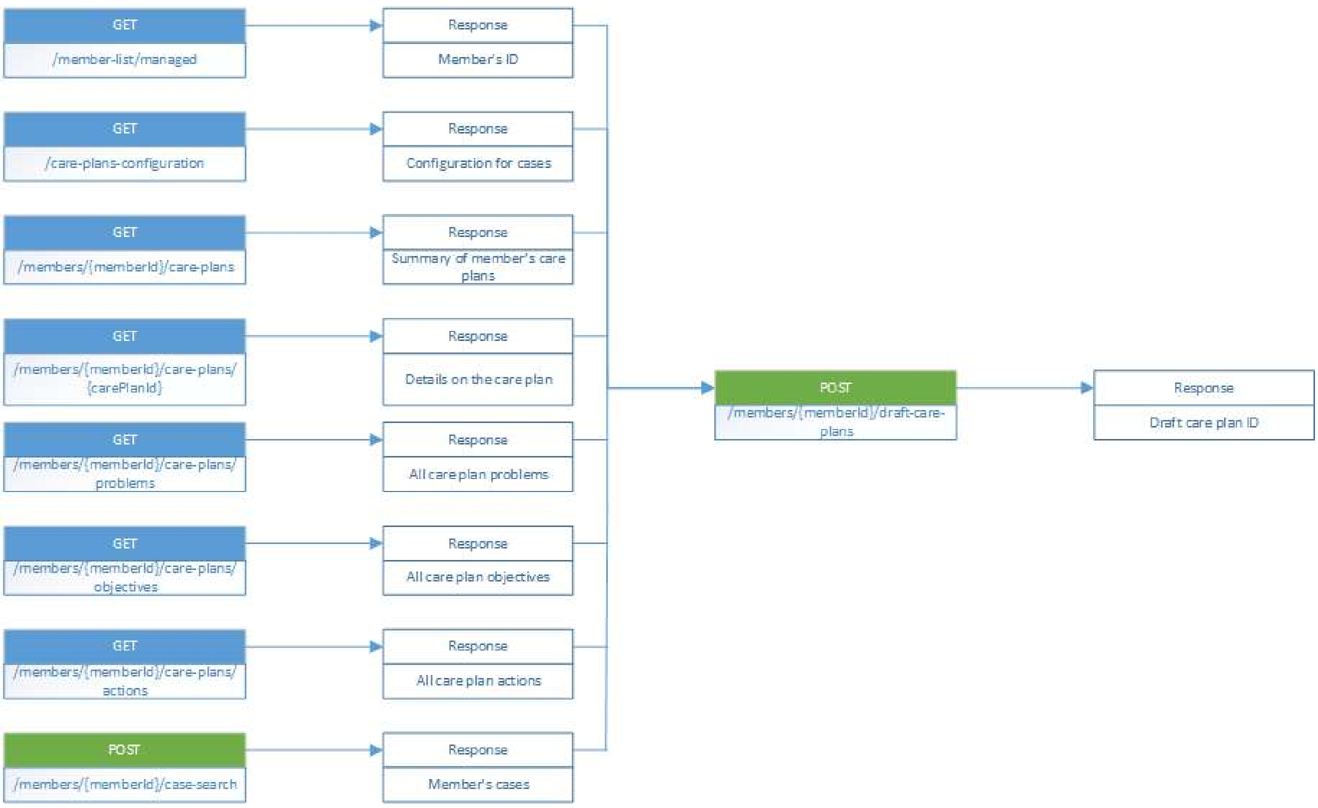
To create a draft of a new care plan, you must provide an existing case and a condition. If you supply a care plan name that is equal to the name of an existing, published condition definition, the condition for the draft care plan is linked with the matching condition definition. If a matching published condition definition does not exist, a custom condition without a link to an existing condition definition is created.

Each care plan may contain sets of care plan elements. A care plan can contain problems, objectives, and actions. A problem can contain objectives and actions. Objectives can contain actions. An objective can be a goal or an outcome. An action can be a task, assessment, intervention, service request, or a text action. Each care plan element can be created from an existing definition or can be custom (no link to a definition). When creating a care plan element from the definition, you must specify a valid definition ID, which represents the definition of the care plan element you are creating. The care plan element inherits the name, description, and other fields from the definition depending on the element type. You provide the rest of the values in the request. If you are creating a custom care plan element, leave the definitionId empty and all values, including the name and the description, of the new care plan element are taken from the request.

To create a draft care plan, you need the following information:

- Member ID
- Care plan configuration and element data

The following graphic shows how to use web services to create a draft care plan.



1. Retrieve the member ID to be used to retrieve the member's care plan summary.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.

3. You can use the GET /care-plans-configuration web service to get the configuration for care plans.
4. You can use the GET /members/{memberId}/care-plans web service to get a list of a member's care plans.
5. You can use the GET /members/{memberId}/care-plans/{carePlanId} web service to get the details of a care plan.
6. You can use the GET /members/{memberId}/care-plans/problems web service to get all of the member's care plan problems.
7. You can use the GET /members/{memberId}/care-plans/objectives web service to get all of the member's care plan objectives.
8. You can use the GET /members/{memberId}/care-plans/actions web service to get all of the member's care plan actions.
9. If you need to search for a member's case, use the POST /members/{memberId}/case-search web service.
10. Use the member ID, the care plan information, and the POST /members/{memberId}/draft-care- plans web service to create the draft care plan.

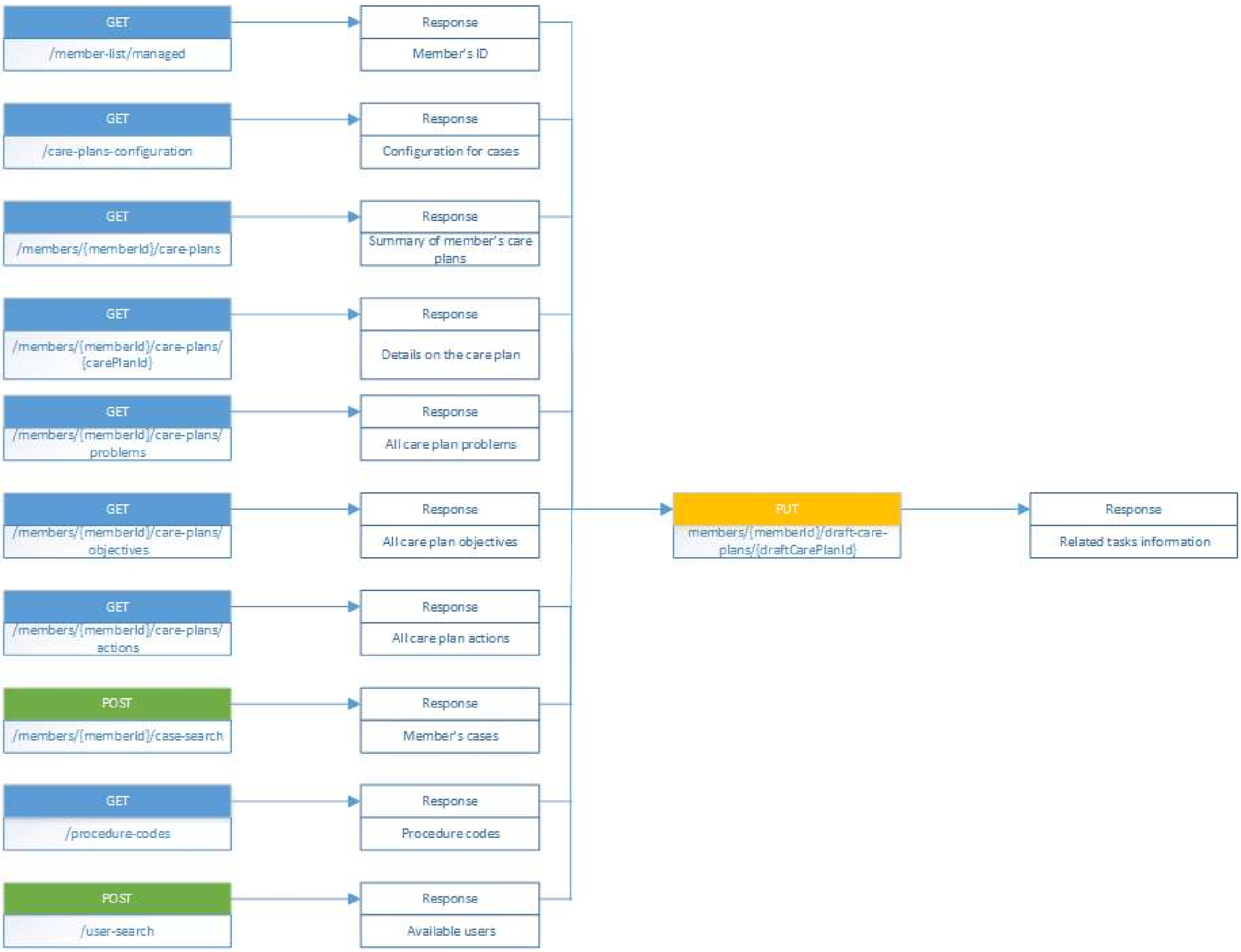
Update a draft care plan

You can update a draft care plan for a member.

To update a draft care plan, you need the following information:

- Member ID
- Draft care plan ID
- Care plan configuration and element data

The following graphic shows how to use web services to update a draft care plan.



1. Retrieve the member ID to be used to retrieve the member's care plan summary.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. You can use the GET /care-plans-configuration web service to get the configuration for care plans.
4. You can use the GET /members/{memberId}/care-plans web service to get a list of a member's care plans.
5. You can use the GET /members/{memberId}/care-plans/{carePlanId} web service to get the details of a care plan.
6. You can use the GET /members/{memberId}/care-plans/problems web service to get all of the member's care plan problems.
7. You can use the GET /members/{memberId}/care-plans/objectives web service to get all of the member's care plan objectives.
8. You can use the GET /members/{memberId}/care-plans/actions web service to get all of the member's care plan actions.
9. If you need to search for a member's case, use the POST /members/{memberId}/case-search web service.
10. If you need to retrieve procedure codes, use the GET /procedure-codes web service.
11. If you are not the primary or secondary owner, you can search for the appropriate user. Refer to Search for a user [297] on page 387 for more information.
12. Use the member ID, the draft care plan ID, the care plan information, and the PUT /members/{member Id}/draft-care-plans/{draftCarePlanId} web service to update the draft care plan.

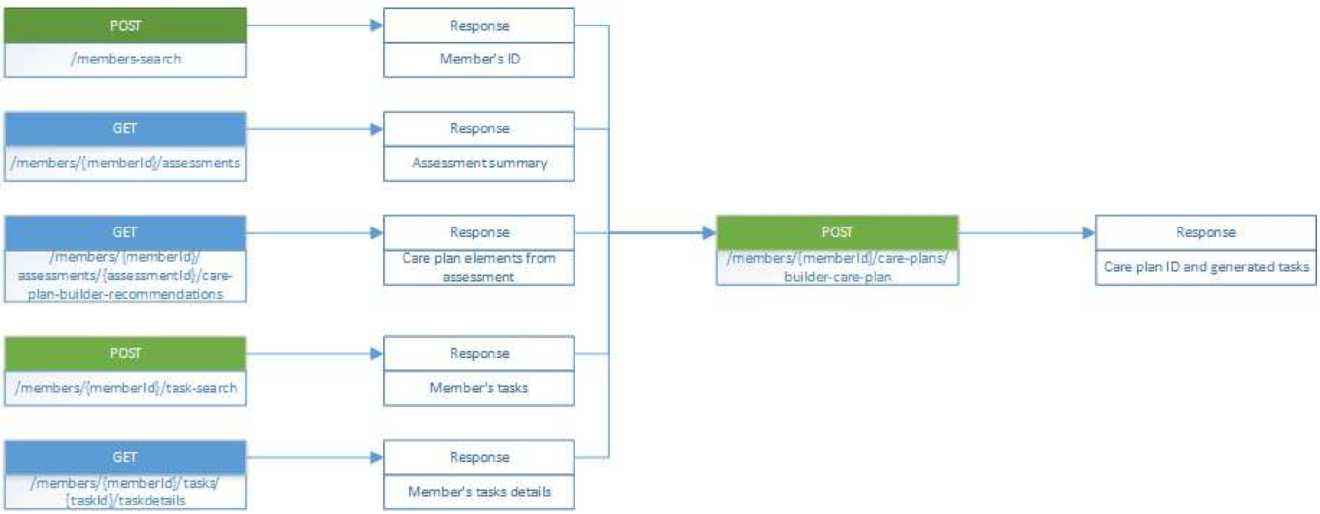
Create a Care Plan from the Builder

You can create a care plan for the member based on care plan elements sent to the care plan builder.

To create a care plan from the care plan builder, you need the following information:

- Member ID
- Member ID type - defaults to internal
- Care plan configuration and element data

The following graphic shows how to use web services to create a care plan from the care plan builder.



1. Retrieve the member ID to be used to retrieve the member's care plan summary.

Refer to Get a managed members list [166] or Search for a member [168] for more information.

2. Store the member ID.
3. You can use the GET /members/{memberId}/assessments web service to get a summary of the member's assessment.
4. You can use the GET /members/{memberId}/assessments/{assessmentId}/care-plan-builder-recommendations web service to get recommendations for the care plan builder.
5. If you need to search the member's tasks, use the POST /members/{memberId}/task-search web service.
6. If you need to get the details of a task, use the GET /members/{memberId}/tasks/{taskId}/taskdetails web service.
7. Use the member ID, the care plan information, and the POST /members/{memberId}/care-plans/ builder-care-plan web service to create a care plan for the member based on care plan elements sent to the care plan builder.

Update a care plan from the builder

You can update an existing care plan from the care plan builder.

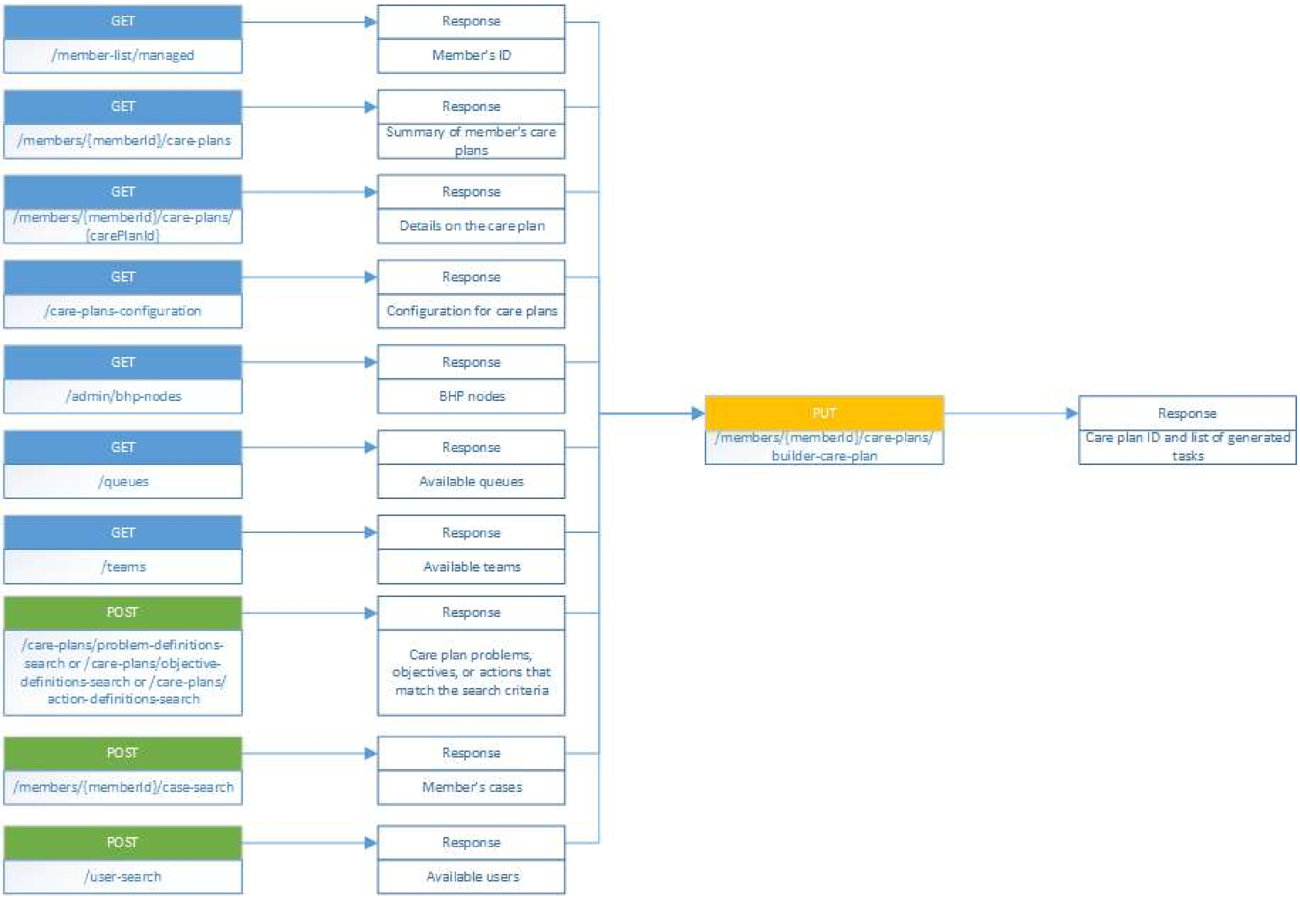
Each care plan can contain sets of care plan element, including problems, objectives, and actions. A problem can contain objectives and actions. Objectives can contain actions. An objective can be a goal or an outcome. Each care plan element can be created from an existing definition or can be custom (no link to a definition).

When creating a care plan element from the definition, you must specify a valid definition ID, which represents the definition of the care plan element you are creating. The care plan element inherits the name, description, and other fields from the definition depending on the element type. You provide the rest of the values in the request. If you are creating a custom care plan element, leave the definition ID empty and all values, including the name and the description, of the new care plan element are taken from the request.

To update an existing care plan from the care plan builder, you need the following information:

- Member ID
- Member ID Type - defaults to Internal

The following graphic shows how to use web services to update an existing care plan from the care plan builder.



1. Retrieve the member ID to be used to retrieve the member's care plan summary.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. You can use the GET /members/{memberId}/care-plans web service to get a summary of the member's care plans.
4. You can use the GET /members/{memberId}/care-plans/{carePlanId} web service to get the details of a member's care plan.
5. You can use the GET /care-plans-configuration web service to get the configuration for care plans.
6. You can use the GET /admin/bhp-nodes web service to get information on the available BHP nodes.
7. You can use the GET /queues web service to get information on the available queues.
8. You can use the GET /teams web service to get information on the available teams.
9. If you need to search for care plan problems, use the POST /care-plans/problem-definitions- search web service.
10. If you need to search for care plan objectives, use the POST /care-plans/objective-definitions-search web service.
11. If you need to search for care plan actions, use the POST /care-plans/action-definitions-search web service.
12. If you need to search for a case, use the POST /members/{memberId}/case-search web service.
13. If you are not the primary or secondary owner, you can search for the appropriate user. Refer to Search for a user [297] on page 387 for more information.
14. Use the member ID, the care plan information, and the PUT /members/{memberId}/care-plans/ builder-care-plan web service to update the care plan from the care plan builder.

Search the care plan's problems

You can search the care plan's problems.

To search the care plan's problems, you need the following information:

- Configuration/search criteria to search for problems

The following graphic shows how to use web services to search the care plan's problems.

1. Use the GET /care-plans-configuration web service to retrieve the configuration to search for the care plan's problems.
2. Use the configuration and the POST /care-plans/problem-definitions-search web service to search the care plan's problems.

Search the care plan's objectives

You can search the care plan's objectives.

To search the care plan's objectives, you need the following information:

- Configuration/search criteria to search for objectives

The following graphic shows how to use web services to search the care plan's objectives.

1. Use the GET /care-plans-configuration web service to retrieve the configuration to search for the care plan's objectives.
2. Use the configuration and the POST /care-plans/objective-definitions-search web service to search the care plan's objectives.

Search the care plan's actions

You can search the care plan's actions.

To search the care plan's actions, you need the following information:

- Configuration/search criteria to search for actions

The following graphic shows how to use web services to search the care plan's actions.

1. Use the GET /care-plans-configuration web service to retrieve the configuration to search for the care plan's actions.
2. Use the configuration and the POST /care-plans/action-definitions-search web service to search the care plan's actions.

Cases

You may need to use web services to interact with a member's cases.

The following sections describe how to use web services to interact with a member's cases. For example, you can use web services to create a case for a member, update an existing case for a member, and close a case for a member.

Topics in this section

You may need to determine if a case has been created for a member. You need specific information to use web services to search for a member's case.

Get the details on a member's case [114]

You may need to get the details on a case to review it with the member. You need specific information to use web services to retrieve the details on a member's case.

Create a case for a member [115]

You may need to create a case after an appointment with the member. You need specific information to use web services to create a case for a member.

Update a member's case [116]

You may need to update a case after reviewing it with a member. You need specific information to use web services to update a member's case.

Close a member's case [116]

You may need to close a case after reviewing the case with the member. You need specific information to use web services to close a member's case.

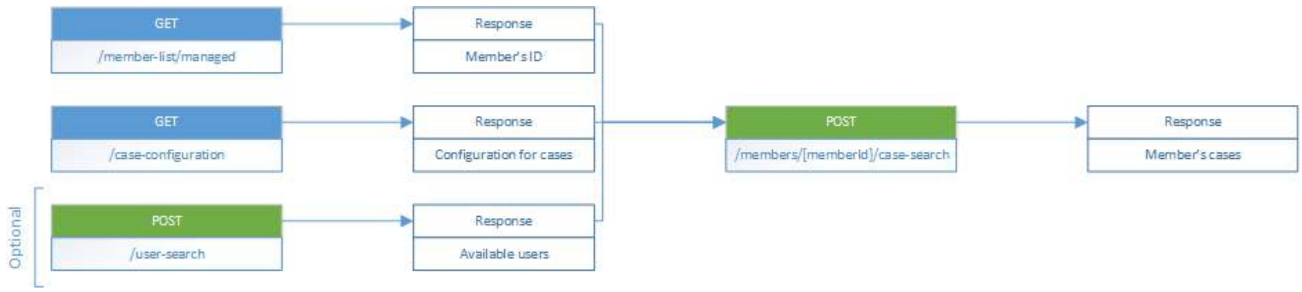
Search a member's cases

You may need to determine if a case has been created for a member. You need specific information to use web services to search for a member's case.

To search the member's cases, you need the following information:

- Member ID
- Configuration for cases
- User who created the case (optional)

The following graphic shows how to use web services to search for a member's case.



1. Retrieve the member ID to be used in the search.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the GET /case-configuration web service to get the configuration to be used in the search.
4. (Optional) If you did not create the case, search for the user you want to use in the search. Refer to Search for a user [297] on page 387 for more information.
5. Use the member ID, any additional search criteria, and the POST /members/{memberId}/case- search web service to search for a member's case.

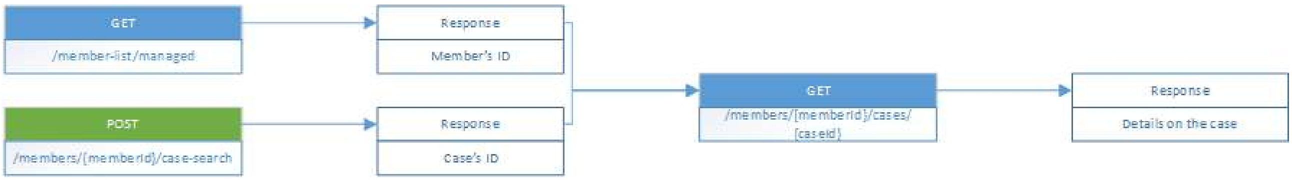
Get the details on a member's case

You may need to get the details on a case to review it with the member. You need specific information to use web services to retrieve the details on a member's case.

To get the details on a case, you need the following information:

- Member ID
- Case ID

The following graphic shows how to use web services to retrieve the details on a member's case.



1. Retrieve the member ID to be used to get the case and the associated details.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the case you want to view in detail.

   Refer to Search a member's cases [114] on page 151 for more information.
4. Store the ID of the case.
5. Use the member ID, the case ID, and the GET /members/{memberId}/cases/{caseId} web service to get the details on the case.

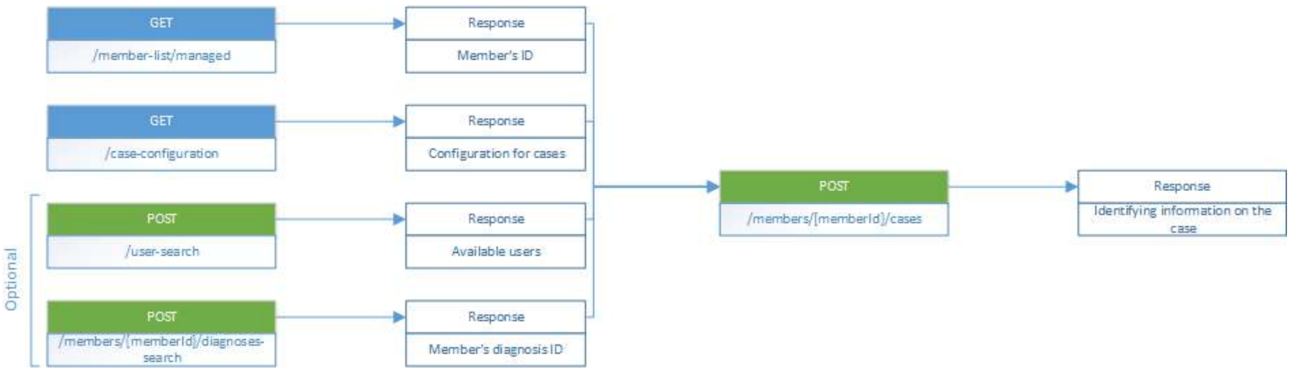
Create a case for a member

You may need to create a case after an appointment with the member. You need specific information to use web services to create a case for a member.

To create a case, you need the following information:

- Member ID
- Configuration to create a case
- User ID (optional)
- Diagnosis code (optional)

The following graphic shows how to use web services to create a case for a member.



1. Retrieve the member ID to be used to create the case.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.
3. Use the GET /case-configuration web service to get the configuration to create a case.
4. (Optional) If you are not the primary or secondary owner, search for the appropriate user. Refer to Search for a user [297] for more information.
5. (Optional) If including the primary diagnosis, search for the member's diagnosis using the POST / members/{memberId}/diagnoses-search web service.
6. Use the member ID, the case's information, and the POST /members/{memberId}/cases web service to create the case for the member.

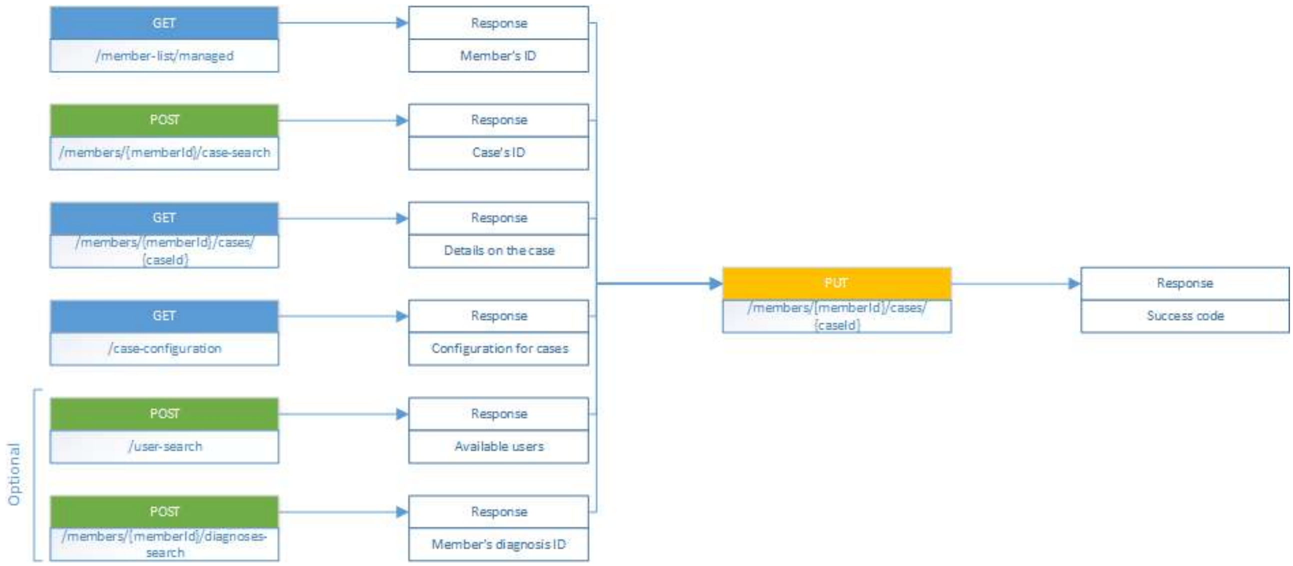
Update a member's case

You may need to update a case after reviewing it with a member. You need specific information to use web services to update a member's case.

To update a case, you need the following information:

- Member ID
- Case ID
- Details on the existing case
- Configuration to update the case
- User ID (optional)
- Diagnosis ID (optional)

The following graphic shows how to use web services to update a member's case.



1. Retrieve the member ID to retrieve and update a case.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the case you want to update.

   Refer to Search a member's cases [114] on page 151 for more information.
4. Store the ID of the case.
5. Use the member ID, the case ID, and the GET /members/{memberId}/cases/{caseId} web service to get the details on the case.
6. Use the GET /case-configuration web service to get the configuration to update a case.
7. (Optional) If you are not the primary or secondary case owner, search for the appropriate user's information.

   Refer to Search for a user [297] on page 387 for more information.
8. (Optional) To update the diagnosis information on the case, use the POST /members/{memberId}/ diagnoses-search web service to retrieve the member's diagnosis ID.
9. Use the member ID, the case ID, the updated case information, and the PUT /members/{memberId}/ cases/{caseId} web service to update the member's case.

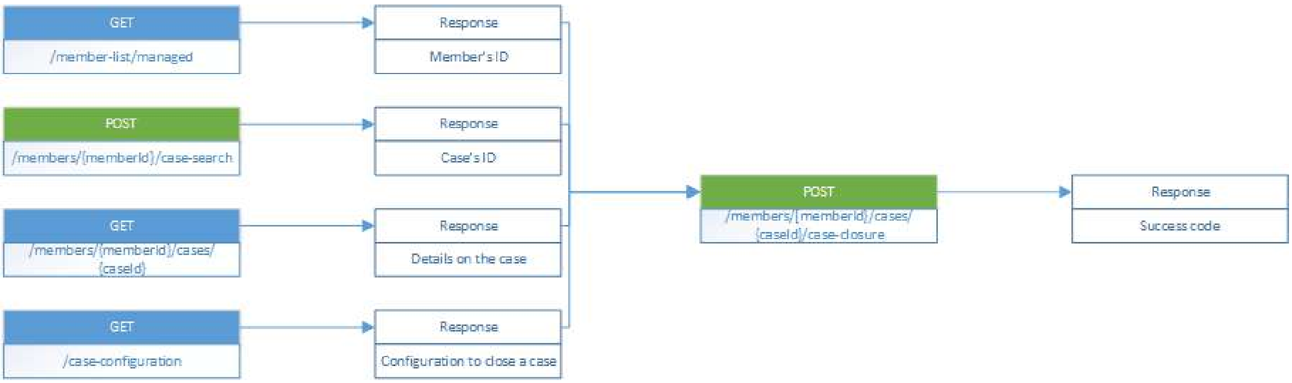
Close a member's case

You may need to close a case after reviewing the case with the member. You need specific information to use web services to close a member's case.

To close a case, you need the following information:

- Member ID
- Case ID
- Details on the case
- Configuration to close a case

The following graphic shows how to use web services to close a member's case.



1. Retrieve the member ID to be used to retrieve and close the case.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.
3. Search for the case you want to close.

   Refer to Search a member's cases [114] for more information.
4. Store the ID of the case to be closed.
5. Use the member ID, the case ID, and the GET /members/{memberId}/cases/{caseId} web service to get the details on the case.
6. Use the GET /case-configuration web service to get the configuration to close a case.
7. Use the member ID, the case ID, the closure information, and the POST /members/{memberId}/ cases/{caseId}/case-closure web service to close the member's case.

Correspondence search

You may need to review the member's correspondence. You can use web services to search the member's correspondence.

The following sections describe how to use web services to search for correspondence.

Topics in this section

You may need to search for a specific case in member correspondence with the member. You need specific information to use web services to search the member's correspondence summaries.

You can view the letter history for a distributed piece of correspondence. You need specific information to view letter history.

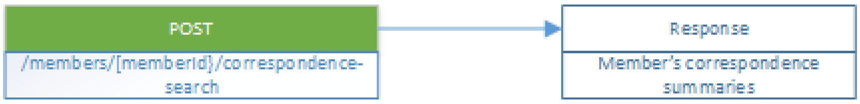
Search the member's correspondence for a specific case

You may need to search for a specific case in member correspondence with the member. You need specific information to use web services to search the member's correspondence summaries.

To search the for a specific case, you need the following information:

- Member ID
- License Feature (also known as Case Management) (in the back end, the license feature is added as CM)
- Case ID

The following graphic shows how to use web services to search a member's correspondence summary for a specific case.



1. Retrieve the member ID to be used in the search.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the GET /letter-configuration web service to get the configuration for letters.
4. Use the member ID to search for the case ID.
5. Use the member ID, case ID and the POST /members/{memberId}/correspondence-search web service to search the member's correspondence and fetch the correspondence detail for a specific case.

View letter history

You can view the letter history for a distributed piece of correspondence. You need specific information to view letter history.

To view letter history for a distributed piece of correspondence, you need the following information:

- Letter number

The following graphic shows how to use web services to view letter history:

1. Retrieve the distributed correspondence using the Get /letters/ web service.
2. Select a letter ID.
3. Use the letter ID and the POST /letters/{letterId}/mailings-search web service to view the letter history.

Cost savings

You can use web services to interact with a member's cost savings.

The following sections describes how to use web services to interact with a member's cost savings. For example, you can search a member's cost savings using web services.

Topics in this section

You may need to review a cost savings record with the member. You need specific information to use web services to search for a member's cost savings.

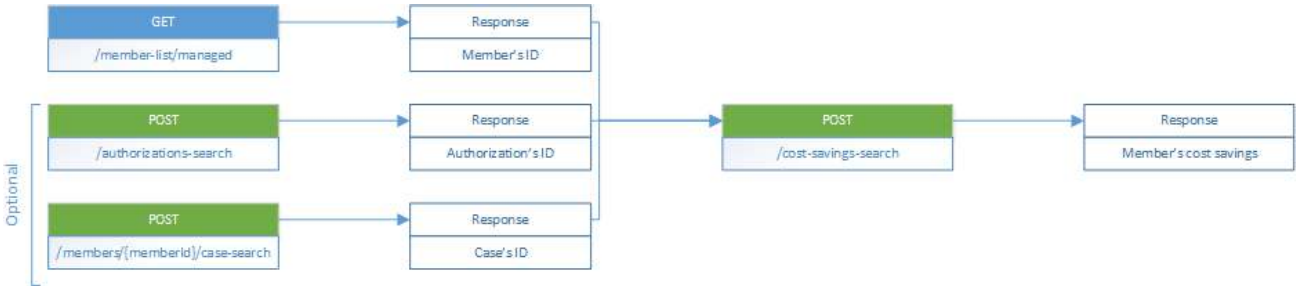
Search a member's cost savings

You may need to review a cost savings record with the member. You need specific information to use web services to search for a member's cost savings.

To search for cost savings, you need the following information:

- Member ID
- Authorization ID (optional)
- Case ID (optional)

The following graphic shows how to use web services to search a member's cost savings.



1. Retrieve the member ID to be used in the search.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. (Optional) If searching for cost savings associated with an authorization, search for the authorization to use the information in the search.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. (Optional) If searching for cost savings associated with a case, search for the case to use the information in the search.

   Refer to Search a member's cases [114] on page 151 for more information.
5. Use the member ID, any appropriate search criteria, and the POST /cost-savings-search web service to search for a cost savings.

Diagnosis

You can interact with a member's diagnoses using web services.

The following describes how to use web services to interact with a member's diagnoses. For example, you can use web services to create or update a member's diagnosis.

Topics in this section

Search a member's diagnoses [120] on page 158

You may need to review a diagnosis with a member. You need specific information to use web services to search the member's diagnoses.

Get the details on a member's diagnosis [120] on page 159

You may need to get the details on a diagnosis to review it with the member. You need specific information to use web services to retrieve the details on a member's diagnosis.

Create a diagnosis [120] on page 159

You may need to create a diagnosis after an appointment with the member. You need specific information to use web services to create a diagnosis for a member.

Update a member's diagnosis [121] on page 160

You may need to update a diagnosis after reviewing it with the member. You need specific information to use web services to update a member's diagnosis.

Void a member's diagnosis [122] on page 161

You may need to void a diagnosis for the member if it was recorded erroneously. You need specific information to use web services to void a member's diagnosis.

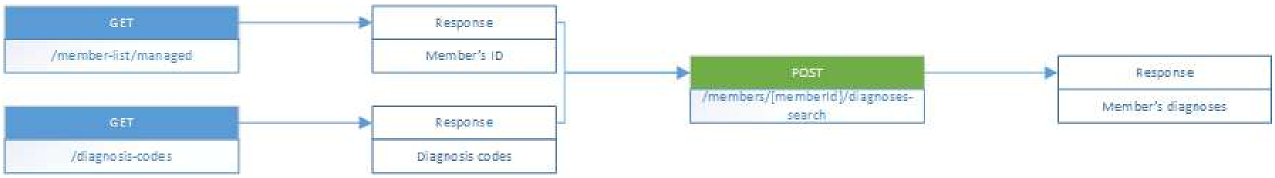
Search a member's diagnoses

You may need to review a diagnosis with a member. You need specific information to use web services to search the member's diagnoses.

To search for a diagnosis, you need the following information:

- Member ID
- Diagnosis code (optional)

The following graphic shows how to use web services to search a member's diagnoses.



1. Retrieve the member ID to be used in the search.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. (Optional) To include a specific code in the search, use the GET /diagnosis-codes web service to retrieve the appropriate diagnosis code.
4. Use the member ID, any additional search criteria, and the POST /members/{memberId}/diagnoses-search web service to search the member's diagnoses.

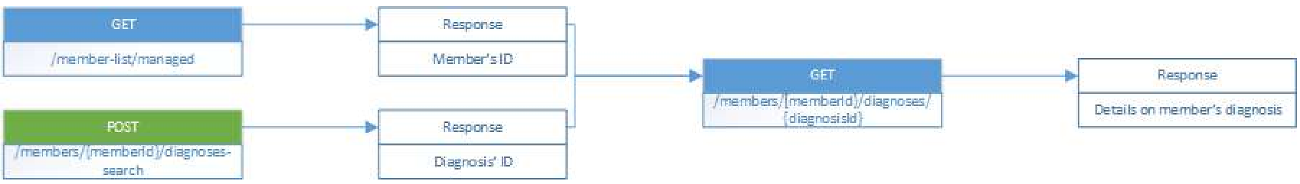
Get the details on a member's diagnosis

You may need to get the details on a diagnosis to review it with the member. You need specific information to use web services to retrieve the details on a member's diagnosis.

To get the details on a diagnosis, you need the following information:

- Member ID
- Diagnosis ID

The following graphic shows how to use web services to retrieve the details on a member's diagnosis.



1. Retrieve the member ID to be used to retrieve the diagnosis.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the diagnosis you want to view in detail.

   Refer to Search a member's diagnoses [120] on page 158 for more information.
4. Store the ID of the diagnosis.
5. Use the member ID, the diagnosis ID, and the GET /members/{memberId}/diagnoses/

{diagnosisId} web service to get the details on the member's diagnosis.

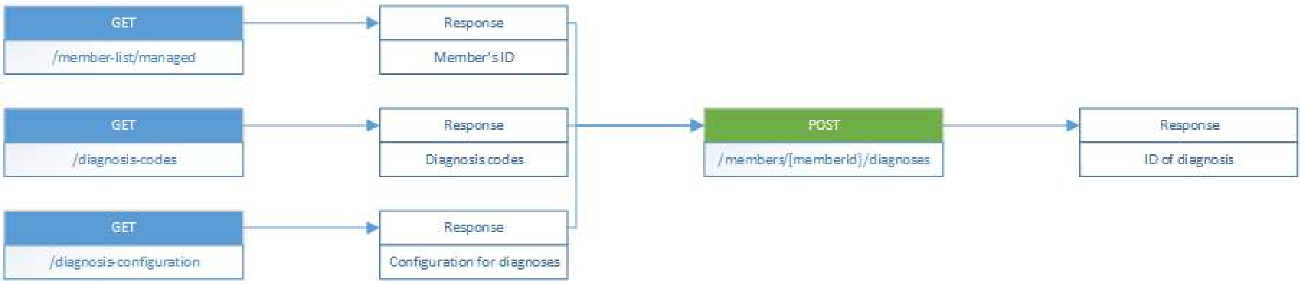
Create a diagnosis

You may need to create a diagnosis after an appointment with the member. You need specific information to use web services to create a diagnosis for a member.

To create a diagnosis, you need the following information:

- Member ID
- Diagnosis code
- Configuration to create a diagnosis

The following graphic shows how to use web services to create a diagnosis for a member.



1. Retrieve the member ID to be used to create the diagnosis.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.
3. Use the GET /diagnosis-codes web service to retrieve the diagnosis codes to be used to create the diagnosis.
4. Store the diagnosis information.
5. Use the GET /diagnosis-configuration web service to get the configuration to create a diagnosis for the member.
6. Use the member ID, the diagnosis code information, the configuration for creating a diagnosis, and the

POST /members/{memberId}/diagnoses web service to create a diagnosis for the member.

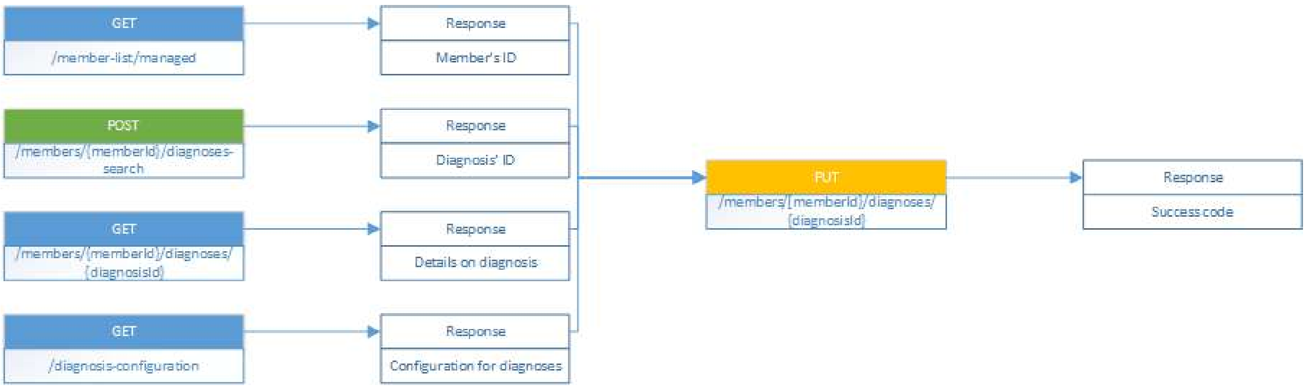
Update a member's diagnosis

You may need to update a diagnosis after reviewing it with the member. You need specific information to use web services to update a member's diagnosis.

To update a diagnosis, you need the following information:

- Member ID
- Diagnosis ID
- Details on the diagnosis
- Configuration to update a member's diagnosis

The following graphic shows how to use web services to update a member's diagnosis.



1. Retrieve the member ID to be used to retrieve and update the diagnosis.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.

2. Store the member ID.
3. Search for the diagnosis to be updated.

   Refer to Search a member's diagnoses [120] on page 158 for more information.
4. Store the ID of the diagnosis.
5. Use the member ID, the diagnosis ID, and the GET /members/{memberId}/diagnoses/{diagnosisId} web service to get the details on the diagnosis.
6. Use the GET /diagnosis-configuration to get the configuration to update a member's diagnosis.
7. Use the member ID, the diagnosis ID, the updated information, and the PUT /members/{memberId}/ diagnoses/{diagnosisId} web service to update the diagnosis.

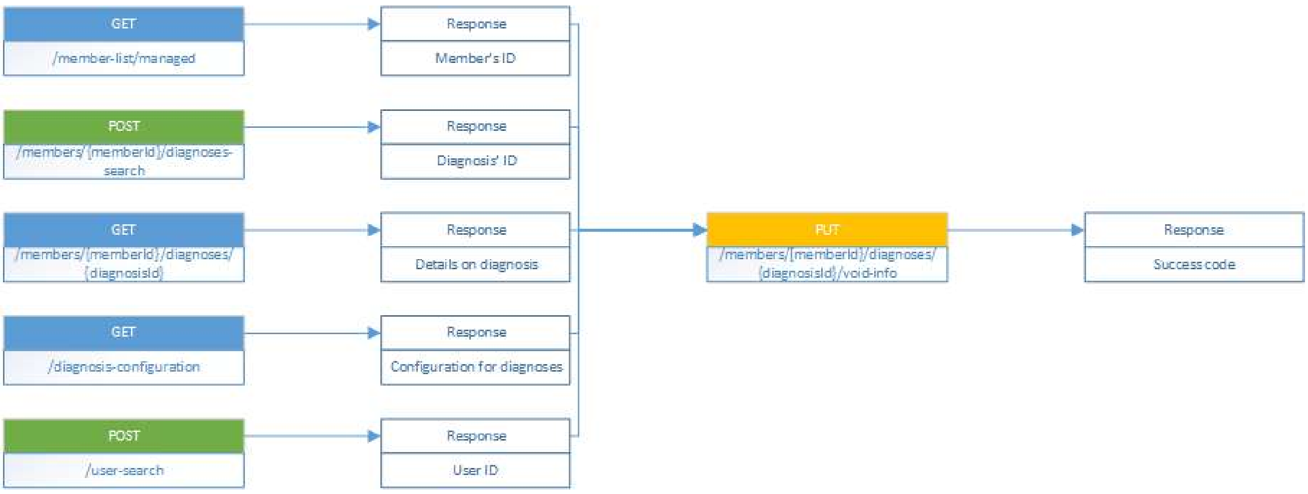
Void a member's diagnosis

You may need to void a diagnosis for the member if it was recorded erroneously. You need specific information to use web services to void a member's diagnosis.

To void a diagnosis, you need the following information:

- Member ID
- Diagnosis ID
- Details on the diagnosis
- Configuration to void a diagnosis

The following graphic shows how to use web services to void a member's diagnosis.



1. Retrieve the member ID to be used to retrieve and void the diagnosis.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the diagnosis to be voided.

   Refer to Search a member's diagnoses [120] on page 158 for more information.
4. Store the ID of the diagnosis.
5. Use the member ID, the diagnosis ID, and the GET /members/{memberId}/diagnoses/{diagnosisId} web service to get the details on the diagnosis.
6. Use the GET /diagnosis-configuration web service to get the configuration to void a diagnosis.
7. Use the POST /user-search web service to retrieve the information on the user who authorized voiding the diagnosis.
8. Use the member ID, the diagnosis ID, the void information, and the PUT /members/{memberId}/ diagnoses/{diagnosisId}/void-info web service to void the member's diagnosis.

Eligibilities

You can use web services to interact with the member's eligibility information.

The following sections describe how to use web services to interact with a member's eligibility. For example, you can retrieve the member's eligibility information to successfully create an authorization for the member.

Topics in this section

You may need to get a summary of eligibilities to review them with the member. You need specific information to use web services to retrieve a summary of the member's eligibilities.

You may need to review the details of a member's particular eligibility with the member. You need specific information to use web services to get the details on the member's eligibility.

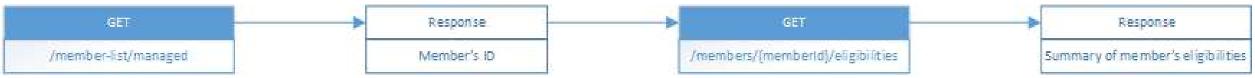
Get a summary of the member's eligibilities

You may need to get a summary of eligibilities to review them with the member. You need specific information to use web services to retrieve a summary of the member's eligibilities.

To get a summary of the member's eligibilities, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a summary of a member's eligibilities.



1. Retrieve the member ID to be used to retrieve the summary.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/eligibilities web service to get a summary of the member's eligibilities.

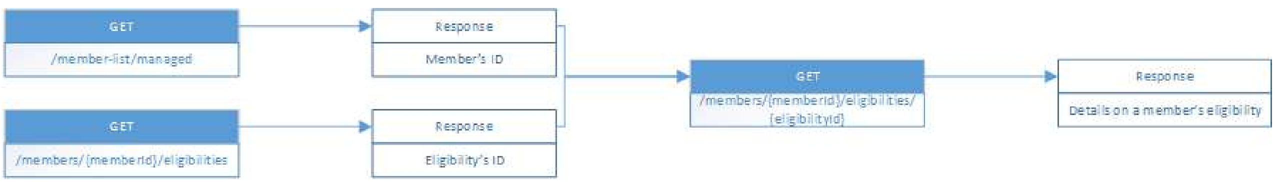
Get the details on a member's eligibility

You may need to review the details of a member's particular eligibility with the member. You need specific information to use web services to get the details on the member's eligibility.

To get the details, you need the following information:

- Member ID
- Eligibility ID

The following graphic shows how to use web services to retrieve the details on a member's eligibility.



1. Retrieve the member ID to be used to retrieve the eligibility information.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.

2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/eligibilities web service to get the summary of the member's eligibilities.
4. Store the ID of the eligibility.
5. Use the member ID, the eligibility ID, and the GET /members/{memberId}/eligibility/

{eligibilitiesId} web service to get the details on a member's eligibility.

Emails

You can interact with a member's email addresses using web services.

The following sections describe how to use web services to interact with a member's emails. For example, you can use web services to create or to update a member's email address.

Topics in this section

Get a summary of the emails for a member [124] on page 164

You may need to review a summary of the member's email addresses to review them with a member. You need specific information to use web services to receive the summary of the member's email addresses.

Get the details on a member's email address [124] on page 165

You may need to review the details on a member's email address. You need specific information to use web services to get the details on the member's email address.

Create an email address for the member [125] on page 165

You may need to create an email address after an appointment with the member. You need specific information to use web services create an email address for a member.

Update an email address for the member [125] on page 166

You may need to update a member's email address after reviewing it with the member. You need specific information to use web services to update the member's email address.

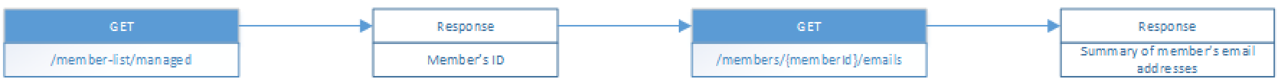
Get a summary of the emails for a member

You may need to review a summary of the member's email addresses to review them with a member. You need specific information to use web services to receive the summary of the member's email addresses.

To get the summary, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a summary of a member's emails.



1. Retrieve the member ID to be used to retrieve the summary.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/emails web service to get a summary of the member's email addresses.

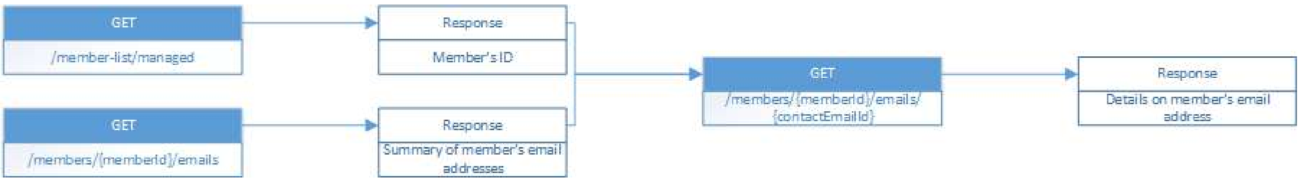
Get the details on a member's email address

You may need to review the details on a member's email address. You need specific information to use web services to get the details on the member's email address.

To get the details on an email address, you need the following information:

- Member ID
- Email address ID

The following graphic shows how to use web services to retrieve the details on a member's email address.



1. Retrieve the member ID to be used to retrieve the details on the email address.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/emails to get a summary of the member's email addresses.
4. Store the ID of the email address.
5. Use the member ID, the email address ID, and the GET /members/{memberId}/emails/{contact EmailId} web service to get the details on a member's email address.

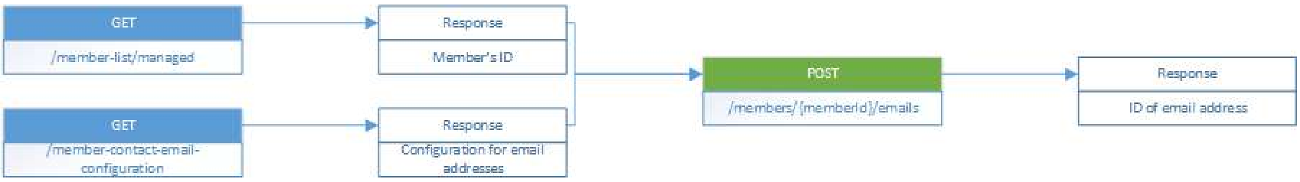
Create an email address for the member

You may need to create an email address after an appointment with the member. You need specific information to use web services create an email address for a member.

To create an email address, you need the following information:

- Member ID
- Configuration to create an email address

The following graphic shows how to use web services to create an email address for a member.



1. Retrieve the member ID to be used to create an email address.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the GET /member-contact-email-configuration web service to get the configuration to create an email address for the member.
4. Use the member ID, the information for the email, and the POST /members/{memberId}/emails web service to create an email address for the member.

Update an email address for the member

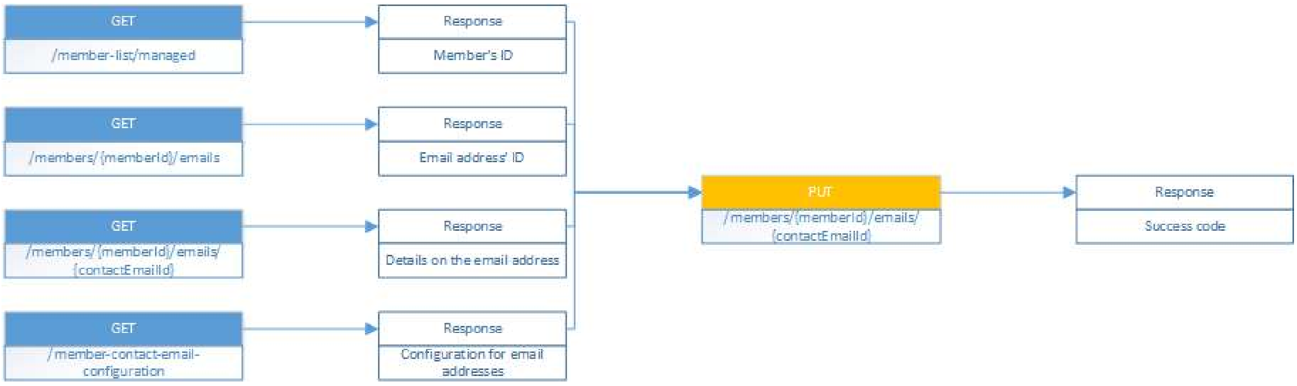
You may need to update a member's email address after reviewing it with the member. You need specific information to use web services to update the member's email address.

To update the email address, you need the following information:

- Member ID
- Email address ID

- Details on the email address
- Configuration to update an email address

The following graphic shows how to use web services to update an email address for a member.



1. Retrieve the member ID to be used to retrieve and update the email address.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/emails web service to get a summary of the member's email addresses.
4. Store the ID of the email address.
5. Use the member ID, the email address ID, and the GET /members/{memberId}/emails/{contact EmailId} web service to get the details on the email address.
6. Use the GET /members-contact-email-configuration web service to get the configuration to update the email address.
7. Use the member ID, the email address ID, the updated information, and the PUT /members/{member Id}/emails/{contactEmailId} web service to update the email address.

HCS enrollment

You can use web services to interact with member's HCS enrollments.

The following sections describes how to use web services to interact with a member's HCS enrollments. For example, you can use web services to create an HCS enrollment and to close an HCS enrollment.

Topics in this section

You may need to get a summary of the HCS enrollments to review them with the member. You need specific information to use web services to retrieve the member's HCS enrollments.

You may need to review the details on an HCS enrollment with the member. You need specific information to use the web services to retrieve the details on a member's HCS enrollment.

You may need to create an HCS enrollment after a meeting with the member. You need specific information to use web services to create an HCS enrollment for a member.

You may need to create an HCS enrollment and associate it with a case after a meeting with the member. You need specific information to use web services to create an HCS enrollment with a case.

Update an HCS enrollment [129] on page 170

You may need to update an HCS enrollment after reviewing it with the member. You need specific information to use web services to update the member's HCS enrollment.

Close an HCS enrollment [129] on page 171

You may need to close an HCS enrollment after reviewing it with the member. You need specific information to use web services to close a member's HCS enrollment.

Get a summary of the member's HCS enrollments

You may need to get a summary of the HCS enrollments to review them with the member. You need specific information to use web services to retrieve the member's HCS enrollments.

To get the summary of HCS enrollments, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a summary of a member's HCS enrollments.

1. Retrieve the member ID to be used to retrieve the summary.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/hcs-enrollments web service to get a summary of the member's HCS enrollments.

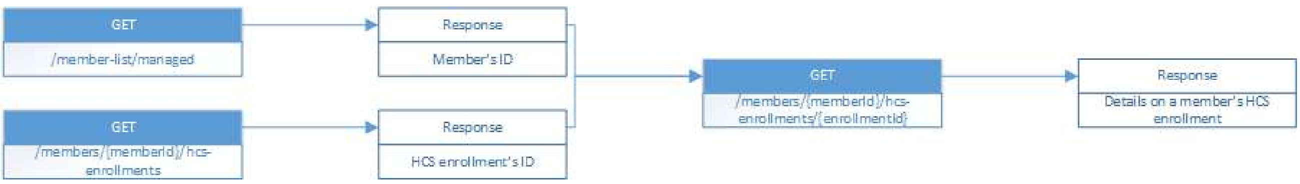
Get the details on a member's HCS enrollment

You may need to review the details on an HCS enrollment with the member. You need specific information to use the web services to retrieve the details on a member's HCS enrollment.

To get the details on an HCS enrollment, you need the following information:

- Member ID
- HCS enrollment ID

The following graphic shows how to use web services to retrieve the details on a member's HCS enrollment.



1. Retrieve the member ID to be used to retrieve the details on an HCS enrollment.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/hcs-enrollments web service to get a summary of the member's HCS enrollments.
4. Store the ID of the HCS enrollment.
5. Use the member ID, the HCS enrollment ID, and the GET /members/{memberId}/hcs-enrollments/{enrollmentId} web service to get the details on the member's HCS enrollment.

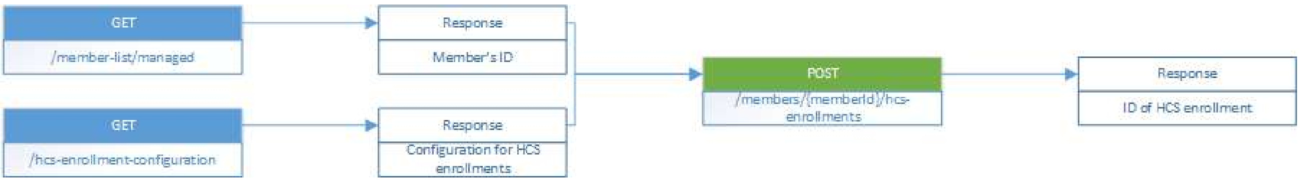
Create an HCS enrollment

You may need to create an HCS enrollment after a meeting with the member. You need specific information to use web services to create an HCS enrollment for a member.

To create an HCS enrollment, you need the following information:

- Member ID
- Configuration to create an HCS enrollment

The following graphic shows how to use web services to create an HCS enrollment for a member.



1. Retrieve the member ID to be used to create the HCS enrollment.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the GET /hcs-enrollment-configuration web service to retrieve the configuration to create an HCS enrollment.
4. Use the member ID, the configuration for the HCS enrollment, and the POST /members/{memberId}/ hcs-enrollments web service to create an HCS enrollment for the member.

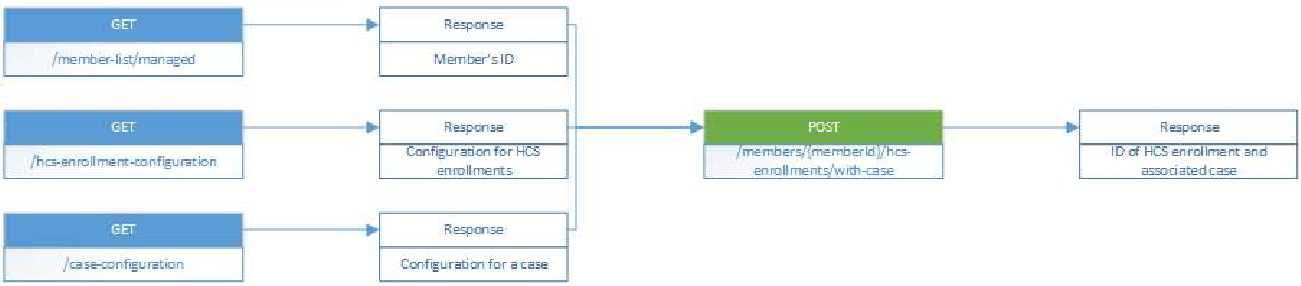
Create an HCS enrollment with a case

You may need to create an HCS enrollment and associate it with a case after a meeting with the member. You need specific information to use web services to create an HCS enrollment with a case.

To create an HCS enrollment with a case, you need the following information:

- Member ID
- Configuration to create an HCS enrollment
- Configuration to create a case

The following graphic shows how to use web services to create an HCS enrollment with a case.



1. Retrieve the member ID to be used to create the HCS enrollment.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the GET /hcs-enrollment-configuration web service to get the configuration to create an HCS enrollment.
4. Use the GET /case-configuration web service to retrieve the configuration to create a case.

5. Use the member ID, the information for the HCS enrollment, the case's information, and the POST / members/{memberId}/hcs-enrollments/with-case web service to create an HCS enrollment with an associated case.

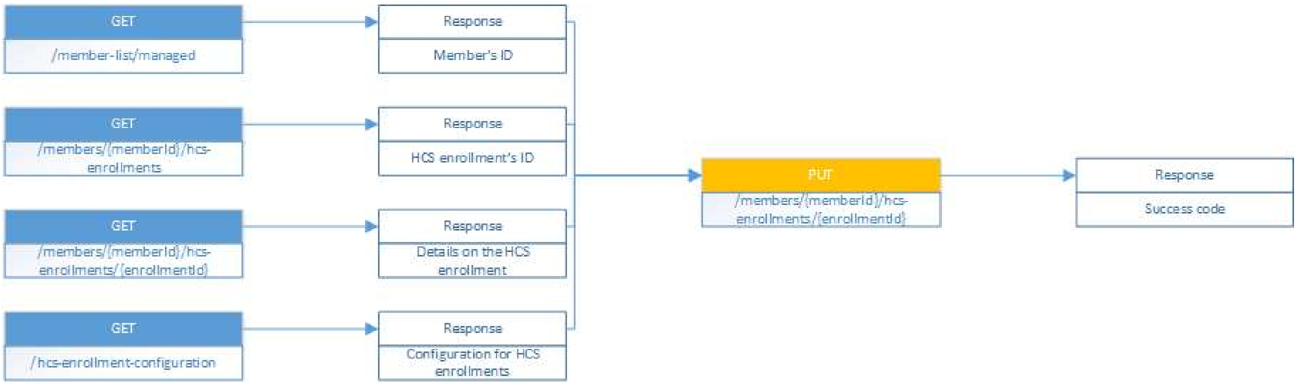
Update an HCS enrollment

You may need to update an HCS enrollment after reviewing it with the member. You need specific information to use web services to update the member's HCS enrollment.

To update an HCS enrollment, you need the following information:

- Member ID
- HCS enrollment ID
- Details on the HCS enrollment
- Configuration to update an HCS enrollment

The following graphic shows how to use web services to update a member's HCS enrollment.



1. Retrieve the member ID to be used to retrieve and update the HCS enrollment.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/hcs-enrollments web service to get a summary of the member's HCS enrollments.
4. Store the ID of the HCS enrollment.
5. Use the member ID, the HCS enrollment ID, and the GET /members/{memberId}/hcs-enrollments/{enrollmentId} web service to get the details on the enrollment.
6. Use the GET /hcs-enrollment-configuration web service to retrieve the configuration to update an enrollment.
7. Use the member ID, the HCS enrollment ID, the updated information, and the PUT /members/{member Id}/hcs-enrollments/{enrollmentId} web service to update the enrollment.

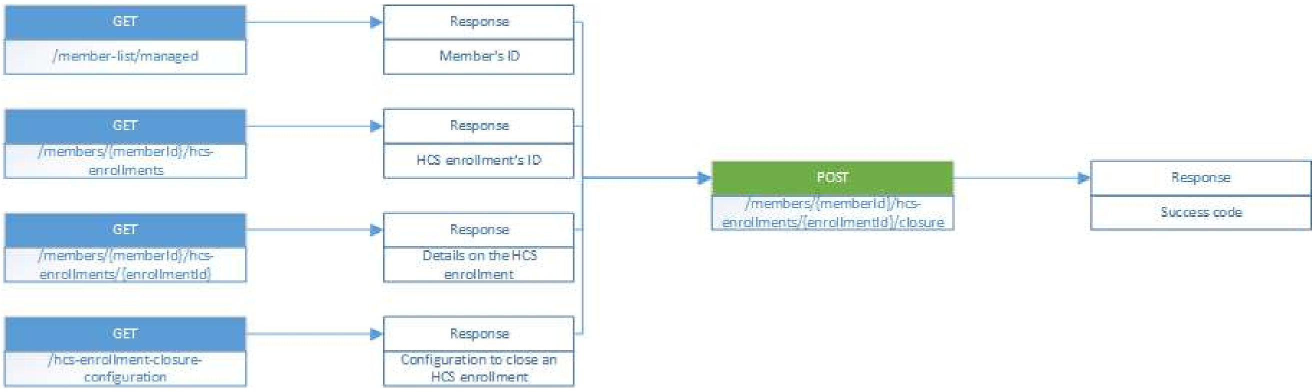
Close an HCS enrollment

You may need to close an HCS enrollment after reviewing it with the member. You need specific information to use web services to close a member's HCS enrollment.

To close an HCS enrollment, you need the following information:

- Member ID
- HCS enrollment ID
- Details on the HCS enrollment
- Configuration to close an HCS enrollment

The following graphic shows how to use web services to close a member's program enrollment.



1. Retrieve the member ID to be used to retrieve and close the HCS enrollment.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/hcs-enrollments web service to get a summary of the HCS enrollments for the member.
4. Store the ID of the HCS enrollment.
5. Use the member ID, the HCS enrollment ID, and the GET /members/{memberId}/hcs-enrollments/{enrollmentId} web service to get the details on the HCS enrollment.
6. Use the GET /hcs-enrollment-closure-configuration web service to retrieve the configuration to close the HCS enrollment.
7. Use the member ID, the HCS enrollment ID, the closure information, and the POST /members/{member Id}/hcs-enrollments/{enrollmentId}/closure web service to close the HCS enrollment.

Inpatient authorizations

You may need to interact with the member's inpatient (IP) authorizations using web services.

The following sections describe how to use web services to interact with a member's IP authorizations. For example, you can use web services to create an IP authorization and update the servicing facility on an IP authorization.

Topics in this section

You may need to create an inpatient (IP) authorization after an appointment with a member. You need specific information to use web services to create an IP authorization for a member.

You may need to review the determination on a line item on the inpatient (IP) authorization. You need specific information to use web services to retrieve the determination on a member's IP authorization.

You may need to review the reopening information on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the reopenings on a member's IP authorization.

You may need to review the appeals on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the appeals on a member's IP authorization.

You may need to review the requests for information (RFIs) on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the RFIs on a member's IP authorization.

Get the correspondence notifications on an inpatient (IP) authorization [138] on page 181

You may need to review the correspondence notifications on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the correspondence notifications on a member's IP authorization.

Get the phone notifications on an inpatient (IP) authorization [139] on page 182

You may need to review the phone notifications on an inpatient (IP) authorization. You need specific information to use web services to retrieve the phone notifications on a member's IP authorization.

Get the linked authorizations on an inpatient (IP) authorization [139] on page 183

You may need to review the service/procedure (SP) authorizations that are linked to an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the linked authorizations on a member's IP authorization.

Get the header information on an inpatient (IP) authorization [140] on page 183

You may need to review the header information on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the header information on a member's IP authorization.

Update the header information on an inpatient (IP) authorization [140] on page 184

You may need to update the header information on an inpatient (IP) authorization after reviewing the authorization with the member. You may need to update the level of urgency or who requested the authorization. You need specific information to use web services to update the header information on a member's IP authorization.

Get the notes on an inpatient (IP) authorization [141] on page 185

You may need to review the notes on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the notes on a member's IP authorization.

Create a note on an inpatient (IP) authorization [142] on page 186

You may need to create a note on an inpatient (IP) authorization after reviewing the authorization with the member. You need specific information to use web services to create a note on a member's IP authorization.

Get the attachments on an inpatient (IP) authorization [143] on page 188

You may need to review the attachments on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the attachments on a member's IP authorization.

Create an attachment on an inpatient (IP) authorization [144] on page 188

You may need to create an attachment on an inpatient (IP) authorization after reviewing the authorization with the member. You need specific information to use web services to create an attachment on a member's IP authorization.

Get the servicing facility on an inpatient (IP) authorization [145] on page 190

You may need to review the servicing facility on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the servicing facility on a member's IP authorization.

Update the servicing facility on an inpatient authorization [145] on page 190

You may need to update the servicing facility on an inpatient (IP) authorization after reviewing the authorization with the member. You need specific information to use web services to update the servicing facility on a member's IP authorization.

Get the diagnosis on an inpatient (IP) authorization [146] on page 192

You may need to review the diagnosis on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the diagnoses on a member's IP authorization.

Update the diagnosis on an inpatient (IP) authorization [147] on page 192

You may need to add, remove, or void a diagnosis on an inpatient (IP) authorization. You can use web services to update a diagnosis on the member's IP authorization.

Get the line item reviews on an inpatient (IP) authorization [148] on page 194

You may need to review the outcome of the reviews on the inpatient (IP) authorization's line items with the member. You need specific information to use web services to retrieve the line item reviews on a member's IP authorization.

Get the line items on an inpatient (IP) authorization [149] on page 194

You may need to review the line items on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the line items on a member's IP authorization.

Create a line item on an inpatient (IP) authorization [149] on page 195

You may need to add a line item to an inpatient (IP) authorization after reviewing the authorization with the member. You need specific information to use web services to create a line item on a member's IP authorization.

Update an inpatient line item on an inpatient (IP) authorization [151] on page 198

You may need to update an inpatient (IP) line item on an IP authorization after reviewing the line item with the member. You need specific information to use web services to update an IP line item on a member's IP authorization.

Update an Rx line item on an inpatient (IP) authorization [152] on page 199

You may need to update an Rx line item on an inpatient (IP) authorization after reviewing the line item with the member. You need specific information to use web services to update an Rx line item on a member's IP authorization.

Update a service/procedure (SP) line item on an inpatient (IP) authorization [154] on page 201

You may need to update a service/procedure (SP) line item on an inpatient (IP) authorization after reviewing the line item with the member. You need specific information to use web services to update an SP line item on a member's IP authorization.

Get the discharge information on an inpatient (IP) authorization [156] on page 204

You may need to review the discharge information on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the discharges on a member's IP authorization.

Create a discharge on an inpatient (IP) authorization [157] on page 205

You may need to discharge an inpatient (IP) authorization after reviewing the authorization with the member. You need specific information to use web services to create a discharge on a member's IP authorization.

Get the readmissions on an inpatient (IP) authorization [158] on page 206

You may need to review the readmission information on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the readmissions on a member's IP authorization.

Get the requesting provider on an inpatient (IP) authorization [158] on page 207

You may need to review the requesting provider on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the requesting provider on a member's IP authorization.

Update the requesting provider on an inpatient (IP) authorization on page 208

You may need to update the requesting provider on an inpatient (IP) authorization after reviewing the authorization with the member. You need specific information to use web services to update the requesting provider on a member's IP authorization.

Create an inpatient (IP) authorization

You may need to create an inpatient (IP) authorization after an appointment with a member. You need specific information to use web services to create an IP authorization for a member.

To create an IP authorization, you need the following information:

- Member ID
- Member BHP node
- Configuration to create an IP authorization
- Provider information
- Diagnosis information
- Procedure codes
- Drug codes (optional)
- Configuration for IP line items
- Configuration for service/procedure (SP) line items (optional)
- Configuration for Rx line items (optional)
- Configuration to create a note on the IP authorization (optional)
- Information on the supported countries (optional)
- Configuration to create an address (optional)
- Configuration to create a phone number (optional)
- Configuration to discharge the IP authorization (optional)
- Configuration to determine the line items (optional)

The following graphic shows how to use web services to create an IP authorization for a member.

1. Retrieve the member ID to be used to create the inpatient authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/member-details web service to get the member's BHP node.
4. Store the member's BHP node.
5. Use the member's BHP node and the GET /inpatient-authorization-configuration web service and the GET /inpatient-authorization-configuration/bhp-configuration web service to get the configuration to create an inpatient authorization for the member.

6. Search for the provider or facility to be included on the authorization. Refer to Search for a provider [231] on page 301 for more information.
7. Use the GET /diagnosis-configuration web service and the GET /diagnosis-codes web service to get the configuration and the diagnosis codes to be used to add a diagnosis to the authorization.
8. Use the GET /procedure-codes web service to get the information on the procedures to be included on the authorization.
9. Use the GET /ip-line-item-configuration web service to get the configuration to create an IP line item no the authorization.
10. (Optional) If including a service/procedure (SP) line item on the authorization, use the GET /sp-line- item-configuration/sp-service-types web service to get the service types available for the member, then use the service type and the GET /sp-line-item-configuration/{serviceType Value} web service to get the configuration for the service type.
11. (Optional) If including an Rx line item on the authorization, use the GET /rx-line-item-configuration web service to get the configuration to create an Rx line item on the authorization.
12. (Optional) If discharging the inpatient authorization, use the GET /discharge-configuration web service to get the configuration to discharge the authorization.
13. (Optional) If determining the line item, use the GET /determination-configuration web service to get the configuration to determine the line item.
14. (Optional) If including medication information on the authorization, use the GET /drugs web service to get the information on the appropriate medications.
15. (Optional) If including notes on the authorization, use the GET /note-definitions/{type} web service to get the definition for the type of note to be created, then use the GET /notes-configuration/note-definition/{noteDefinitionVisibleId} web service to get the configuration to create the note.
16. (Optional) If including international addresses or phone numbers, use the GET /countries web service to get the information on the supported countries.
17. (Optional) If including addresses, use the GET /address-configurations web service and country information, if applicable, to get the configuration to create an address.
18. (Optional) If including phone numbers, use the GET /phone-configurations web service and country information, if applicable, to get the configuration to create a phone number.
19. Use the member ID, the information for the inpatient authorization, and the POST /members/{member Id}/inpatient-authorizations web service to create an inpatient authorization for the member.

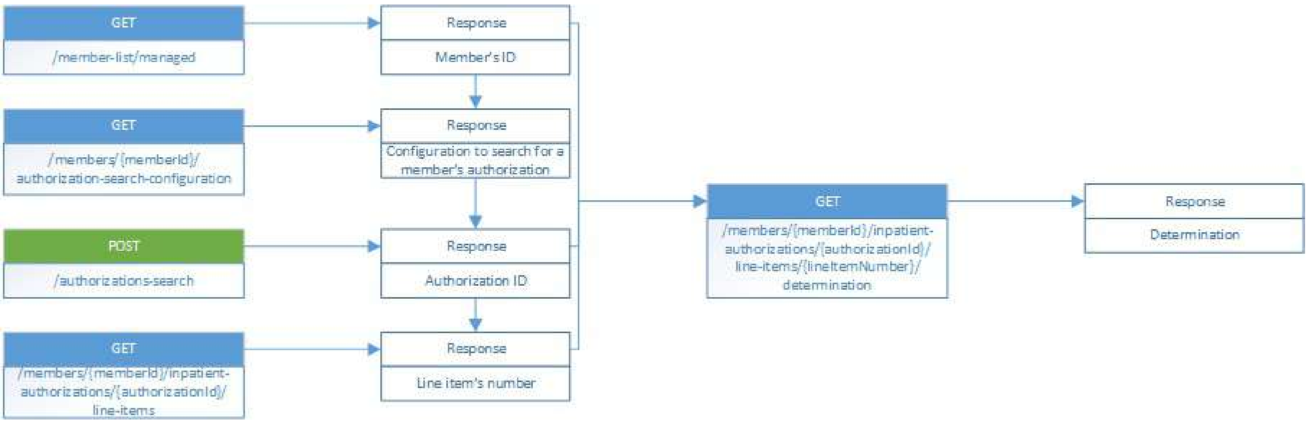
Get the determination on an inpatient (IP) authorization

You may need to review the determination on a line item on the inpatient (IP) authorization. You need specific information to use web services to retrieve the determination on a member's IP authorization.

To get the determination on an inpatient authorization, you need the following information:

- Member ID
- IP authorization ID
- Line item number

The following graphic shows how to use web services to retrieve the determination on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve the authorization and the associated determination information.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the IP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/line-items web service to get a summary of the line items on the IP authorization.
6. Store the number of the line item.
7. Use the member ID, the authorization ID, the line item number, and the GET /members/{member Id}/inpatient-authorizations/{authorizationId}/line-items/{lineItemNumber}/ determination web service to get the determination on the IP authorization's line item.

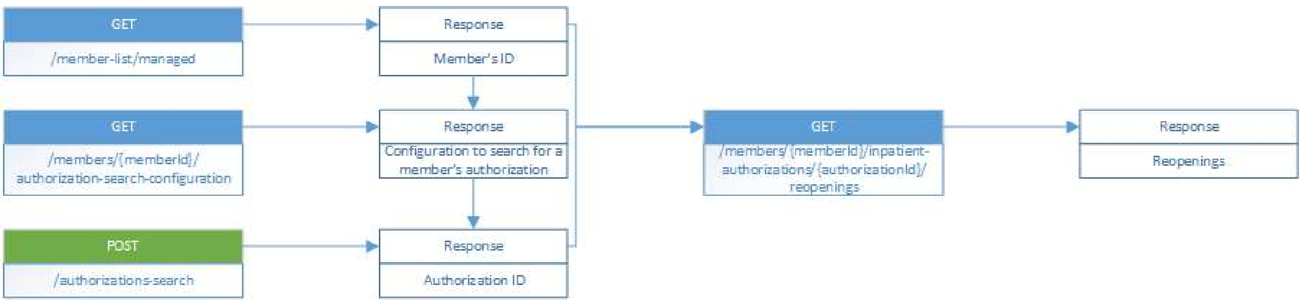
Get the reopenings on an inpatient (IP) authorization

You may need to review the reopening information on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the reopenings on a member's IP authorization.

To get the reopenings, you need the following information:

- Member ID
- IP authorization ID

The following graphic shows how to use web services to retrieve the reopen information on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve the authorization and the associated reopen information.

Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the IP authorization you want to view.

Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/reopenings web service to get the reopen information on the IP authorization.

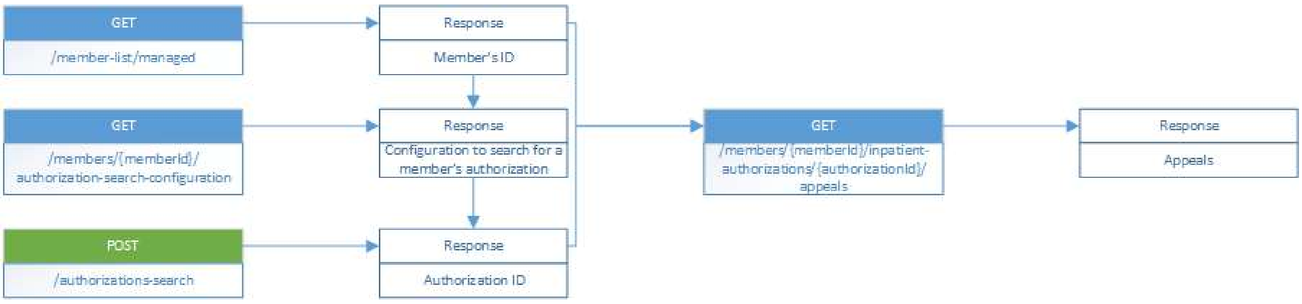
Get the appeals on an inpatient (IP) authorization

You may need to review the appeals on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the appeals on a member's IP authorization.

To get the appeal information on the IP authorization, you need the following information:

- Member ID
- IP authorization ID

The following graphic shows how to use web services to retrieve the appeals on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve the authorization and the associated appeals.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the IP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/appeals web service to get the appeals on the IP authorization.

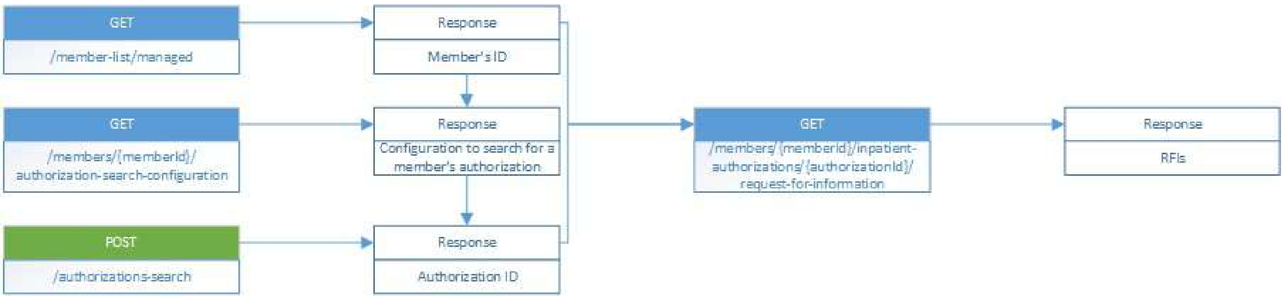
Get the RFIs on an inpatient (IP) authorization

You may need to review the requests for information (RFIs) on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the RFIs on a member's IP authorization.

To get the RFIs on an IP authorization, you need the following information:

- Member ID
- IP authorization ID

The following graphic shows how to use web services to retrieve the RFIs on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve the authorization and the associated RFIs.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the IP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/request-for-information web service to get the RFIs on the IP authorization.

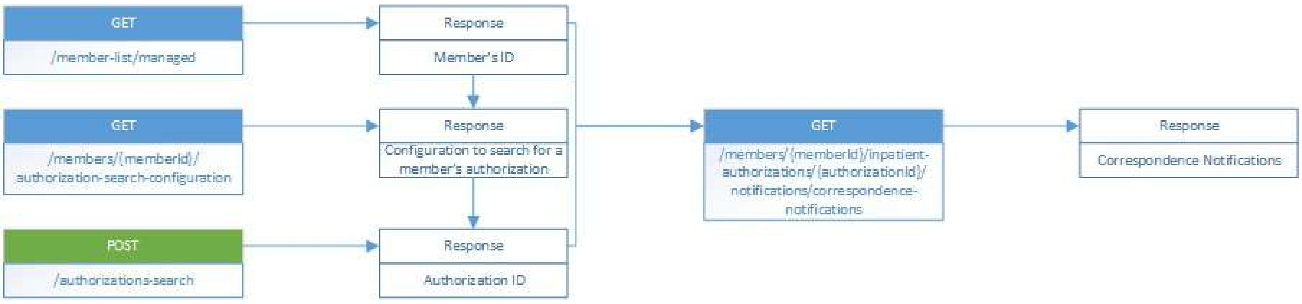
Get the correspondence notifications on an inpatient (IP) authorization

You may need to review the correspondence notifications on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the correspondence notifications on a member's IP authorization.

To retrieve the correspondence notifications, you need the following information:

- Member ID
- IP authorization ID

The following graphic shows how to use web services to retrieve the correspondence notifications on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve the authorization and the associated correspondence notifications.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the IP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/notifications/correspondence-notifications web service to get the correspondence notifications on the IP authorization.

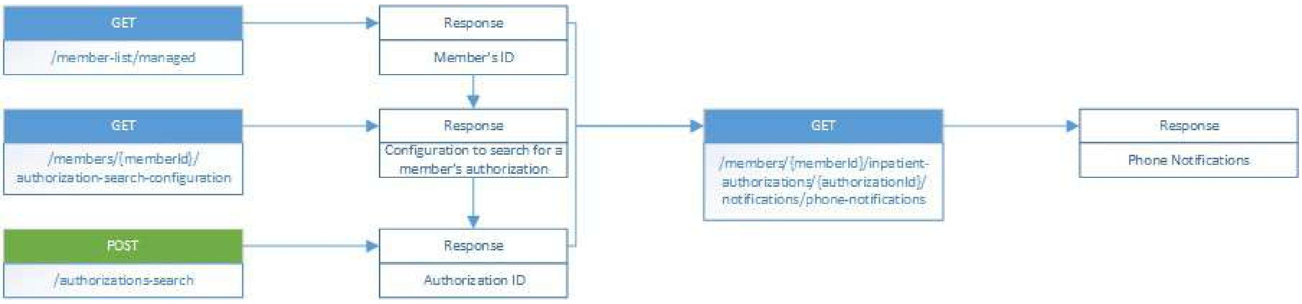
Get the phone notifications on an inpatient (IP) authorization

You may need to review the phone notifications on an inpatient (IP) authorization. You need specific information to use web services to retrieve the phone notifications on a member's IP authorization.

To retrieve the phone notifications, you need the following information:

- Member ID
- IP authorization ID

The following graphic shows how to use web services to retrieve the phone notifications on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve the IP authorization and the associated phone notifications.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the IP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/notifications/phone-notifications web service to get the phone notifications on the IP authorization.

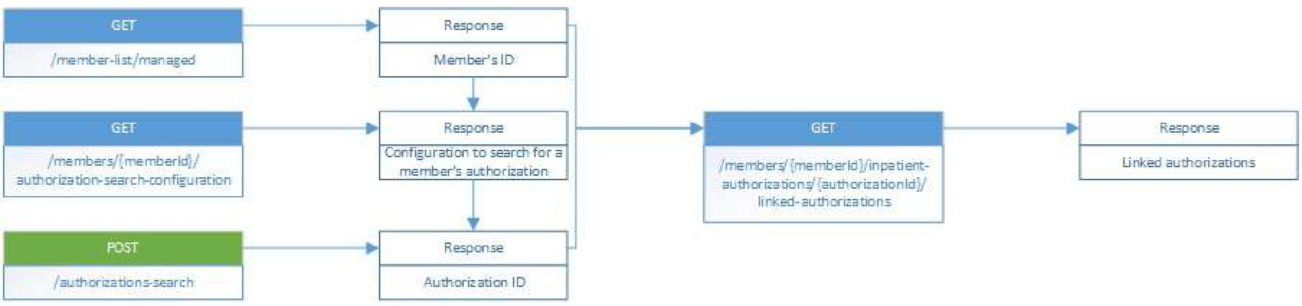
Get the linked authorizations on an inpatient (IP) authorization

You may need to review the service/procedure (SP) authorizations that are linked to an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the linked authorizations on a member's IP authorization.

To get the linked authorizations, you need the following information:

- Member ID
- IP authorization ID

The following graphic shows how to use web services to retrieve the linked authorizations on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve the linked authorizations.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the IP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/linked-authorizations web service to get information on the linked authorizations.

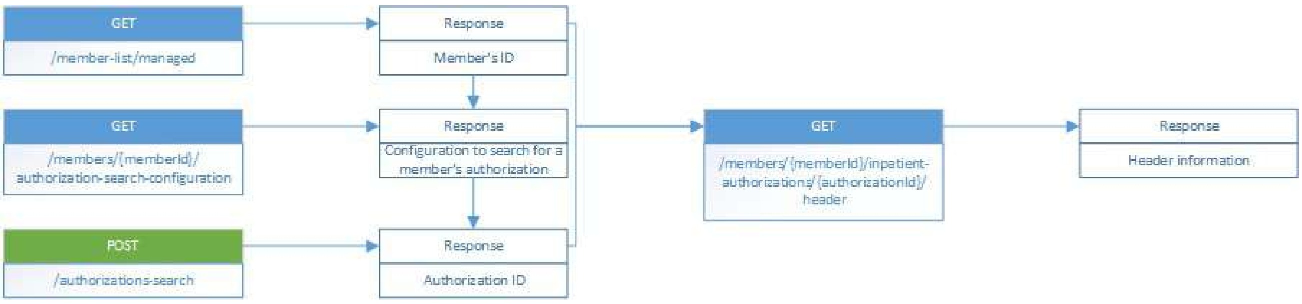
Get the header information on an inpatient (IP) authorization

You may need to review the header information on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the header information on a member's IP authorization.

To get the header information, you need the following information:

- Member ID
- IP authorization ID

The following graphic shows how to use web services to retrieve the header information on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve the authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the IP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/header web service to get the header information on the IP authorization.

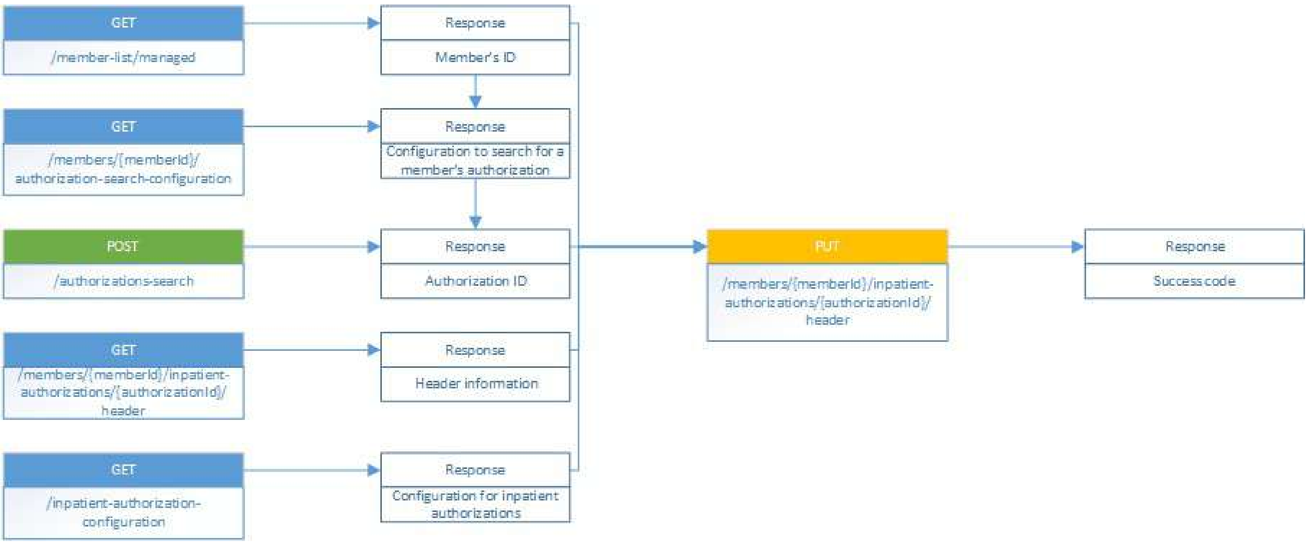
Update the header information on an inpatient (IP) authorization

You may need to update the header information on an inpatient (IP) authorization after reviewing the authorization with the member. You may need to update the level of urgency or who requested the authorization. You need specific information to use web services to update the header information on a member's IP authorization.

To update the header information, you need the following information:

- Member ID
- IP authorization ID
- Existing header information
- Configuration for an IP authorization

The following graphic shows how to use web services to update the header information on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve and update the authorization's header information.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the IP authorization you want to update.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/header web service to get the details on the header.
6. Use the GET /inpatient-authorization-configuration web service to get the configuration to update the IP authorization's header.
7. Use the member ID, the authorization ID, the updated header information, and the PUT / members/

{memberId}/inpatient-authorizations/{authorizationId}/header web service to update the header information.

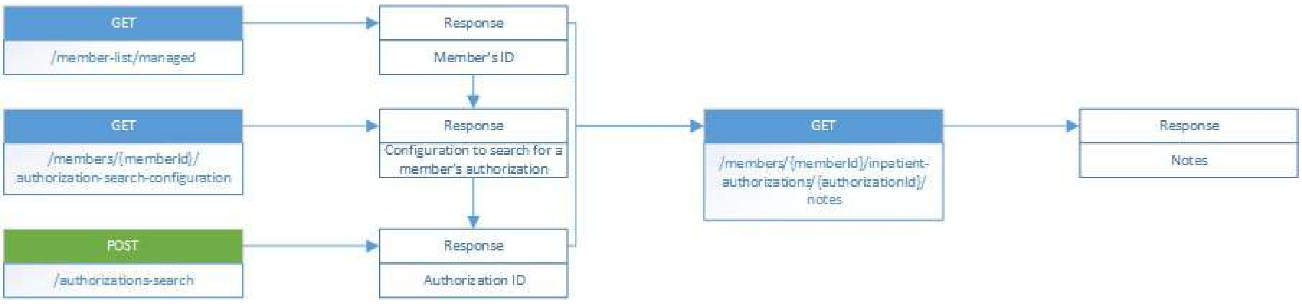
Get the notes on an inpatient (IP) authorization

You may need to review the notes on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the notes on a member's IP authorization.

To get the notes, you need the following information:

- Member ID
- IP authorization ID

The following graphic shows how to use web services to retrieve the notes on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve the information on the authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the IP authorization you want to review.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/notes web service to get the notes on the IP authorization.

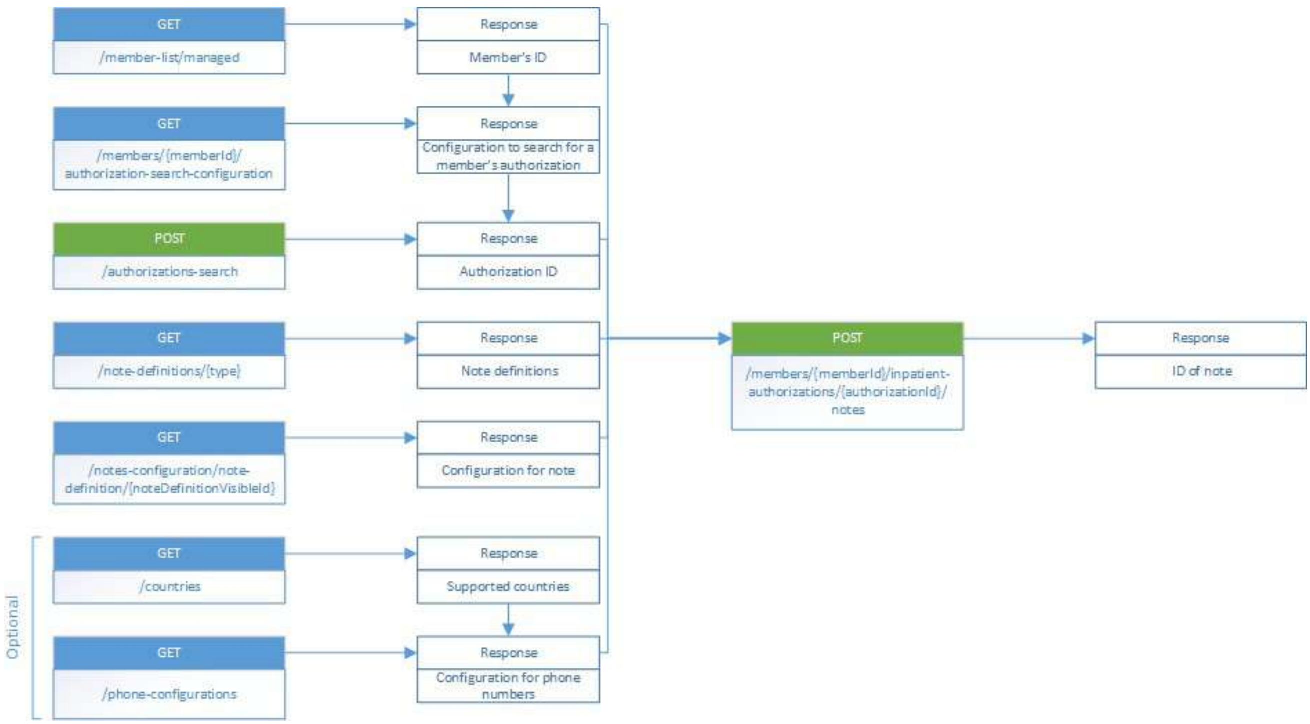
Create a note on an inpatient (IP) authorization

You may need to create a note on an inpatient (IP) authorization after reviewing the authorization with the member. You need specific information to use web services to create a note on a member's IP authorization.

To create a note, you need the following information:

- Member ID
- IP authorization ID
- Definition of the note
- Configuration to create the note
- Information on the supported countries (optional)
- Configuration to create a phone number (optional)

The following graphic shows how to use web services to create a note on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve the authorization ID and to create the note.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the IP authorization you want to update.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the GET /note-definitions/{type} web service to get the definition of the note you want to create on the authorization.
6. Store the ID of the note you want to create.
7. Use the ID of the note and the GET /notes-configuration/note-definition/{note DefinitionVisibleId} web service to get the configuration to create the note.
8. (Optional) If including an international phone number on the note, use the GET /countries web service to get the information on the supported countries.
9. (Optional) If including a phone number on the note, use the GET /phone-configurations web service and the country information, if applicable, to get the configuration to create a phone number.
10. Use the member ID, the authorization ID, the note information, and the POST /members/{memberId}/ inpatient-authorizations/{authorizationId}/notes web service to create a note on the IP authorization.

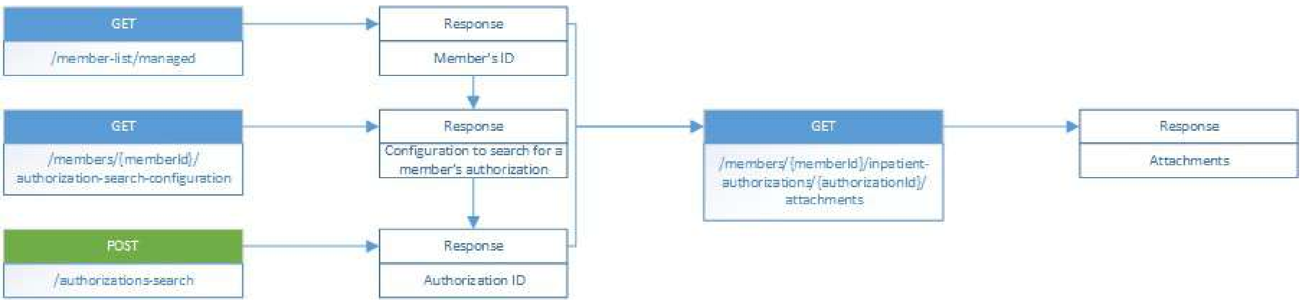
Get the attachments on an inpatient (IP) authorization

You may need to review the attachments on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the attachments on a member's IP authorization.

To get the attachments, you need the following information:

- Member ID
- IP authorization ID

The following graphic shows how to use web services to retrieve the attachments on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve the authorization and the associated attachments.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the IP authorization you want to review.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.

5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/attachments web service to get the attachments on the IP authorization.

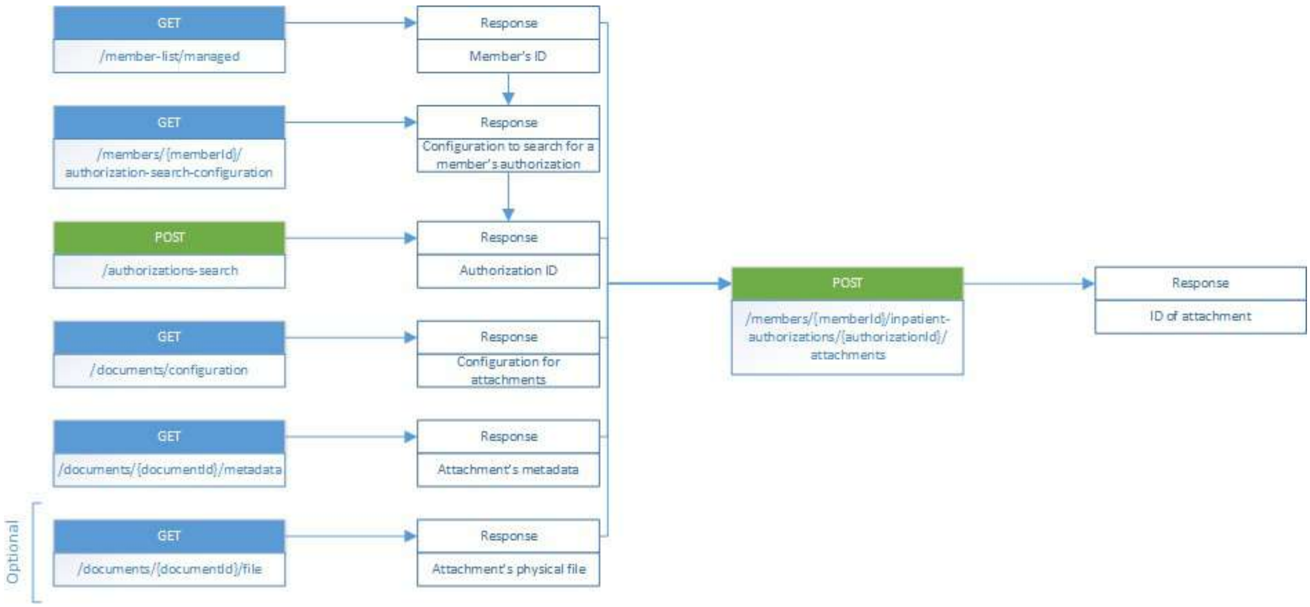
Create an attachment on an inpatient (IP) authorization

You may need to create an attachment on an inpatient (IP) authorization after reviewing the authorization with the member. You need specific information to use web services to create an attachment on a member's IP authorization.

To create an attachment, you need the following information:

- Member ID
- IP authorization ID
- Configuration to create an attachment
- Metadata for the attachment
- File for the attachment (optional)

The following graphic shows how to use web services to create an attachment on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve and update the IP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the IP authorization you want to update.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the GET /documents/configuration web service to get the configuration to create an attachment.
6. Use the GET /documents/{documentId}/metadata web service to get the metadata for the attachment.
7. (Optional) If attaching a physical file (instead of a URL) to the IP authorization, use the GET / documents/{documentId}/file web service to retrieve the physical file.
8. Use the member ID, the authorization ID, the information for the attachment (the metadata and the file, if applicable), and the POST /members/{memberId}/inpatient-authorizations/

{authorizationId}/attachments web service to create an attachment on an IP authorization.

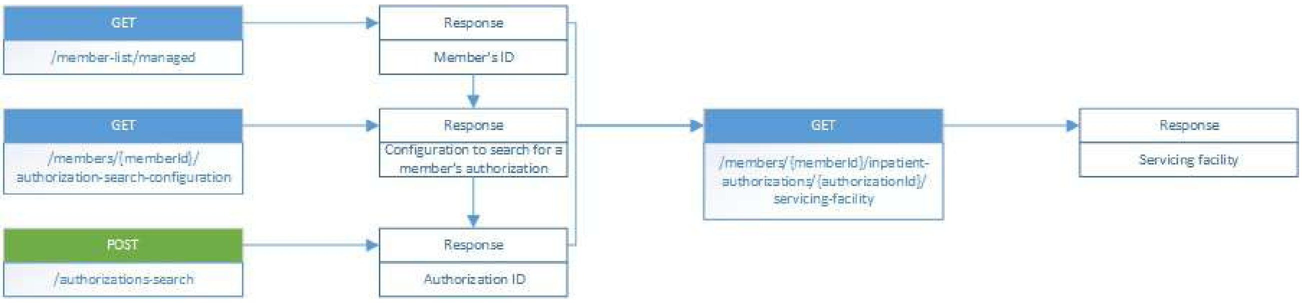
Get the servicing facility on an inpatient (IP) authorization

You may need to review the servicing facility on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the servicing facility on a member's IP authorization.

To get the servicing facility, you need the following information:

- Member ID
- IP authorization ID

The following graphic shows how to use web services to retrieve the servicing facility on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve the authorization and the associated servicing facility.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to review.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/servicing-facility web service to retrieve the servicing facility on an IP authorization.

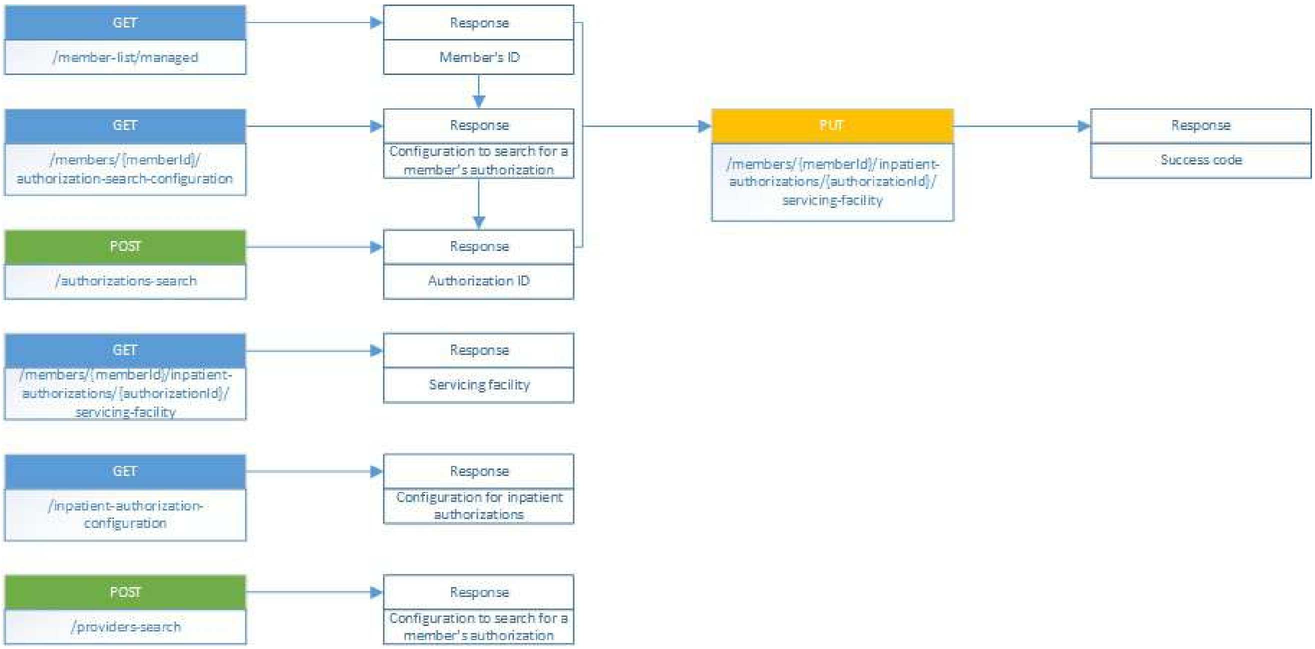
Update the servicing facility on an inpatient authorization

You may need to update the servicing facility on an inpatient (IP) authorization after reviewing the authorization with the member. You need specific information to use web services to update the servicing facility on a member's IP authorization.

To update the servicing facility, you need the following information:

- Member ID
- IP authorization ID
- Existing servicing facility information
- Configuration to update an IP authorization
- New provider information (optional)

The following graphic shows how to use web services to update the servicing facility on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve and update the authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the IP authorization you want to update.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/servicing-facility web service to retrieve the existing information on the servicing facility.
6. Use the GET /inpatient-authorization-configuration web service to get the configuration to update an IP authorization.
7. (Optional) If changing the servicing facility, search for the servicing facility to be used on the IP authorization.

   Refer to Search for a provider [231] on page 301 for more information.
8. Use the member ID, the authorization ID, the updated servicing facility information, and the PUT / members/{memberId}/inpatient-authorizations/{authorizationId}/servicing- facility web service to update the servicing facility on the IP authorization.

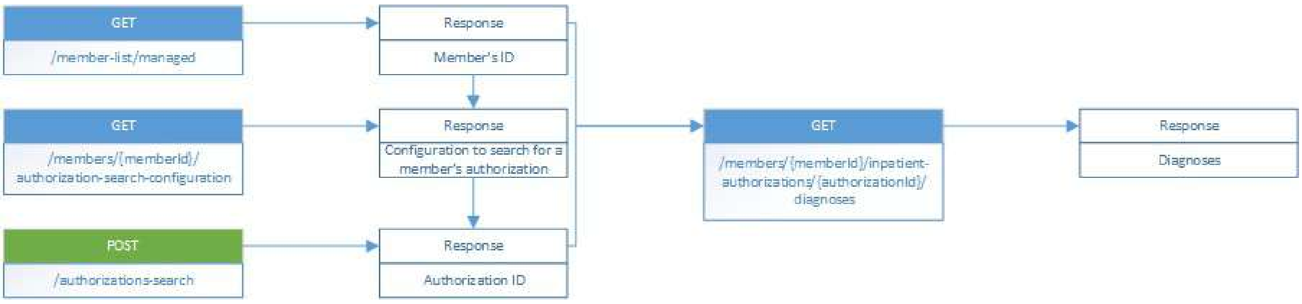
Get the diagnosis on an inpatient (IP) authorization

You may need to review the diagnosis on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the diagnoses on a member's IP authorization.

To retrieve the diagnosis information, you need the following information:

- Member ID
- IP authorization ID

The following graphic shows how to use web services to retrieve the diagnosis on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve the diagnosis and the corresponding diagnosis information.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to review.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/diagnoses web service to retrieve the diagnosis on an IP authorization.

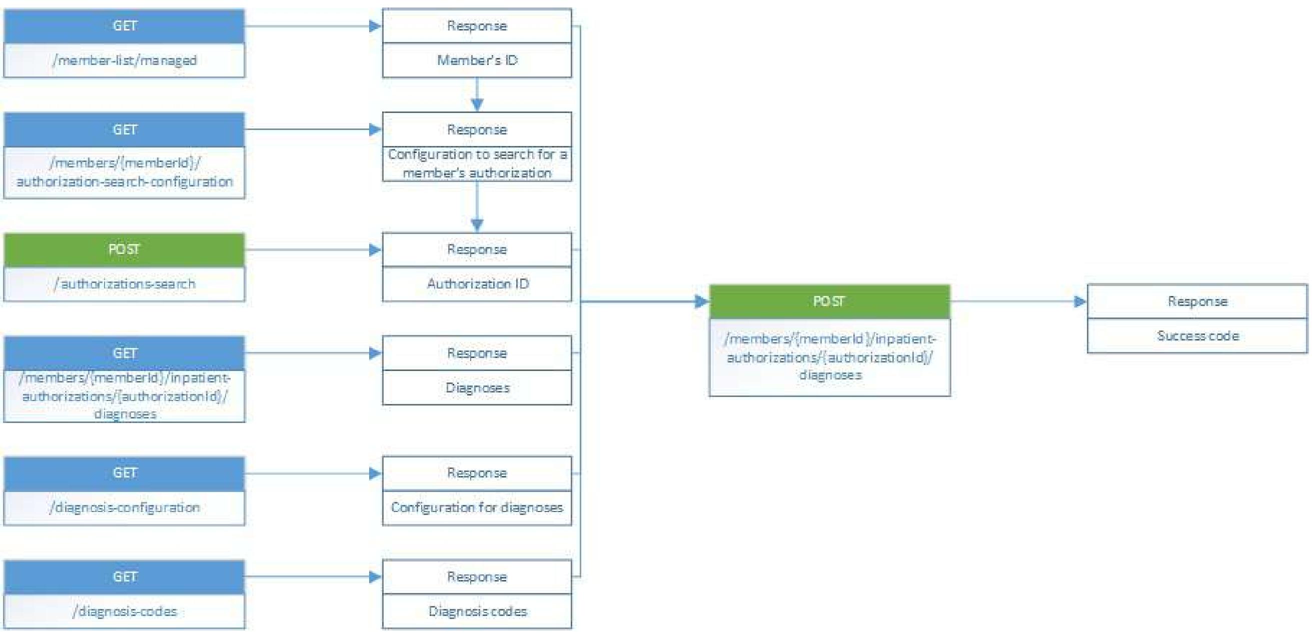
Update the diagnosis on an inpatient (IP) authorization

You may need to add, remove, or void a diagnosis on an inpatient (IP) authorization. You can use web services to update a diagnosis on the member's IP authorization.

To update the diagnosis, you need the following information:

- Member ID
- IP authorization ID
- Details on the diagnosis
- Configuration to update a diagnosis
- Diagnosis code (optional)

The following graphic shows how to use web services to update the diagnosis on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve and update the diagnosis.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to update.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/diagnoses web service to retrieve the information on the existing diagnosis.
6. (Optional) If adding or voiding the diagnosis, use the GET /diagnosis-configuration web service to retrieve the configuration to create and update the diagnosis.
7. (Optional) If adding a diagnosis, use the GET /diagnosis-codes web service to retrieve the appropriate diagnosis information.
8. Use the member ID, the authorization ID, the updated diagnosis information, and the POST /members/

{memberId}/inpatient-authorizations/{authorizationId}/diagnoses web service to update the diagnosis information on the IP authorization.

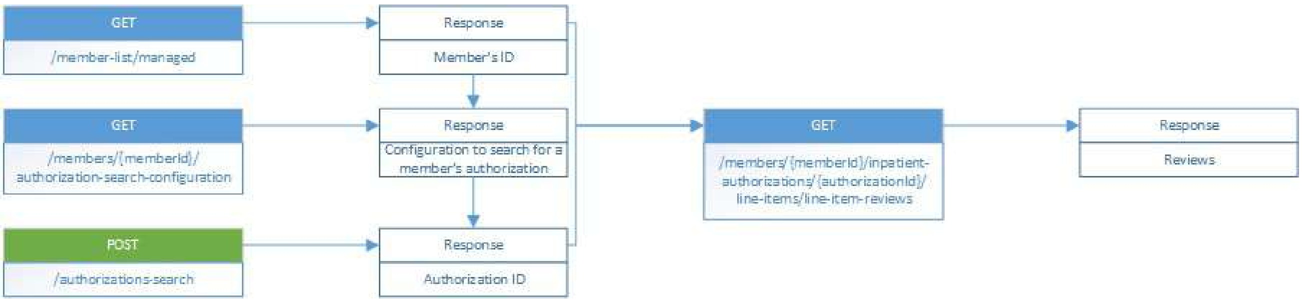
Get the line item reviews on an inpatient (IP) authorization

You may need to review the outcome of the reviews on the inpatient (IP) authorization's line items with the member. You need specific information to use web services to retrieve the line item reviews on a member's IP authorization.

To retrieve the reviews, you need the following information:

- Member ID
- IP authorization ID

The following graphic shows how to use web services to retrieve the line item reviews on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve the authorization and the associated reviews.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to review.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/line-items/line-item-reviews web service to retrieve the line items' reviews on an IP authorization.

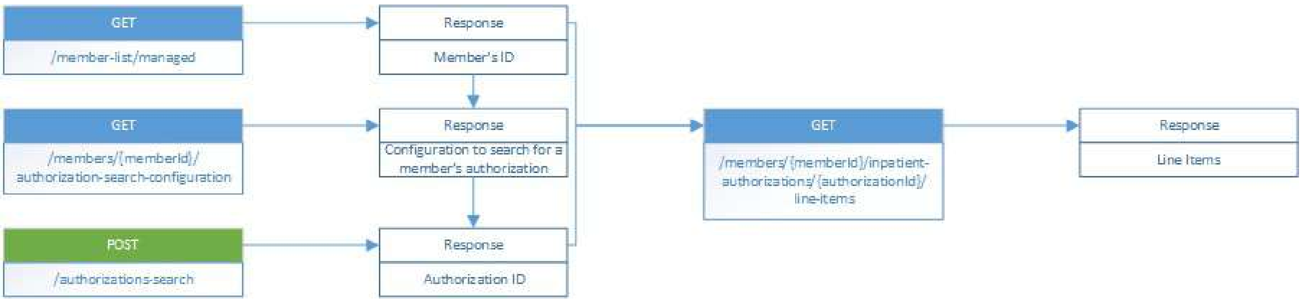
Get the line items on an inpatient (IP) authorization

You may need to review the line items on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the line items on a member's IP authorization.

To retrieve the line items, you need the following information:

- Member ID
- IP authorization ID

The following graphic shows how to use web services to retrieve the line items on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve the authorization and the associated line items.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to review.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/line-items web service to retrieve the line items on the IP authorization.

Create a line item on an inpatient (IP) authorization

You may need to add a line item to an inpatient (IP) authorization after reviewing the authorization with the member. You need specific information to use web services to create a line item on a member's IP authorization.

To create a line item, you need the following information:

- Member ID
- IP authorization ID
- Existing line items
- Configuration to update an IP authorization
- Configuration to create the line item (inpatient, service/procedure, or Rx)
- Member eligibility information
- Configuration to determine the line item (optional)
- Provider information
- Information for a queue or user (optional)
- Medication information (optional)

- Procedure code information (optional)
- Diagnosis code information (optional)

The following graphic shows how to use web services to create a line item on an IP authorization.

1. Retrieve the member ID to be used to retrieve and update the authorization.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.
3. Search for the authorization you want to update.

Refer to Search for a member's authorization [75] for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/line-items web service to retrieve the information on the existing line items.
6. Use the GET /inpatient-authorization-configuration web service and the GET/inpatient-authorization-configuration/bhp-configuration web service to retrieve the configuration to update an IP authorization.
7. Depending on the type of line item you want to add, use the following web services to retrieve the configuration to create the appropriate line item.
    - GET /ip-line-item-configuration — Get the configuration to create an IP line item.
    - GET /rx-line-item-configuration — Get the configuration to create an Rx line item.
    - GET /sp-line-item-configuration/sp-service-types — Get the available service types to create a service/procedure (SP) line item.
    - GET /sp-line-item-configuration/{serviceTypeValue} — Get the configuration for the service type to create the SP line item.
8. Use the member ID and the GET /members/{memberId}/eligibilities web service to retrieve the member's eligibility information.
9. (Optional) If determining the new line item, use the GET /determination-configuration web service to retrieve the configuration to determine the line item.
10. Search for the provider (or facility) to be used on the line item. Refer to Search for a provider [231] for more information.
11. (Optional) If including information for the next task to be created, use the GET /queues web service or the POST /user-search web service to retrieve the appropriate queue or user, respectively, to be assigned the task.
12. (Optional) If including medication information on the line item, use the GET /drugs web service to get the appropriate medication information.
13. (Optional) If including procedure information on the line item, use the GET /procedure-codes web service to retrieve the appropriate procedure information.
14. (Optional) If including diagnosis information on the line item, use the GET /diagnosis-codes web service to retrieve the appropriate diagnosis information.
15. Use the member ID, the authorization ID, the information for the new line item, and the POST / members/{memberId}/inpatient-authorizations/{authorizationId}/line-items web service to add the line item to the IP authorization.

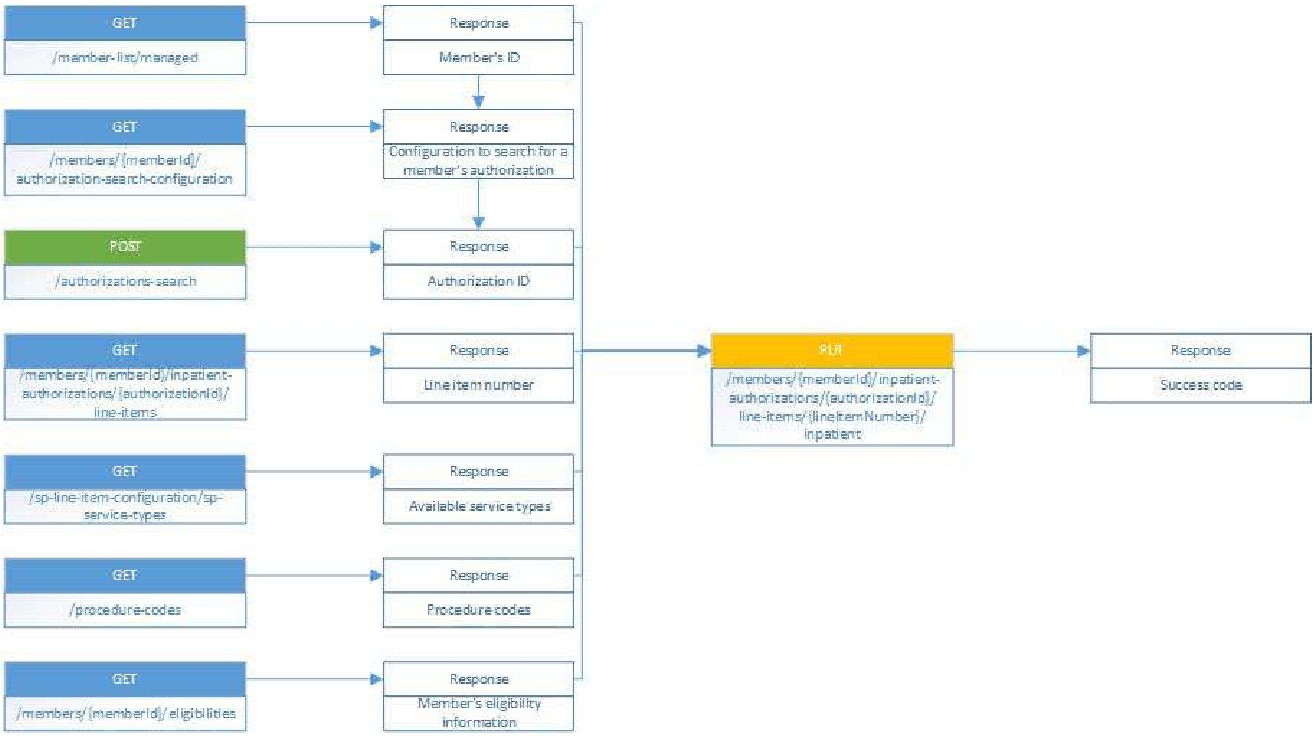
Update an inpatient line item on an inpatient (IP) authorization

You may need to update an inpatient (IP) line item on an IP authorization after reviewing the line item with the member. You need specific information to use web services to update an IP line item on a member's IP authorization.

To update the IP line item, you need the following information:

- Member ID
- IP authorization ID
- Line item number
- Configuration to update the IP line item
- Member's eligibility information
- Procedure information (optional)

The following graphic shows how to use web services to update an IP line item on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve and update the IP line item.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to update.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the GET /ip-line-item-configuration web service to retrieve the configuration to update the line item.
6. (Optional) If updating the procedure information, use the GET /procedure-code web service to retrieve the appropriate procedure information.
7. Use the member ID and the GET /members/{memberId}/eligibilities web service to retrieve the member's eligibility information.
8. Use the member ID, the authorization ID, the updated IP line item's information, and the PUT / members/{memberId}/inpatient-authorizations/{authorizationId}/line-items/{line ItemNumber}/inpatient web service to update the IP line item on the IP authorization.

Update an Rx line item on an inpatient (IP) authorization

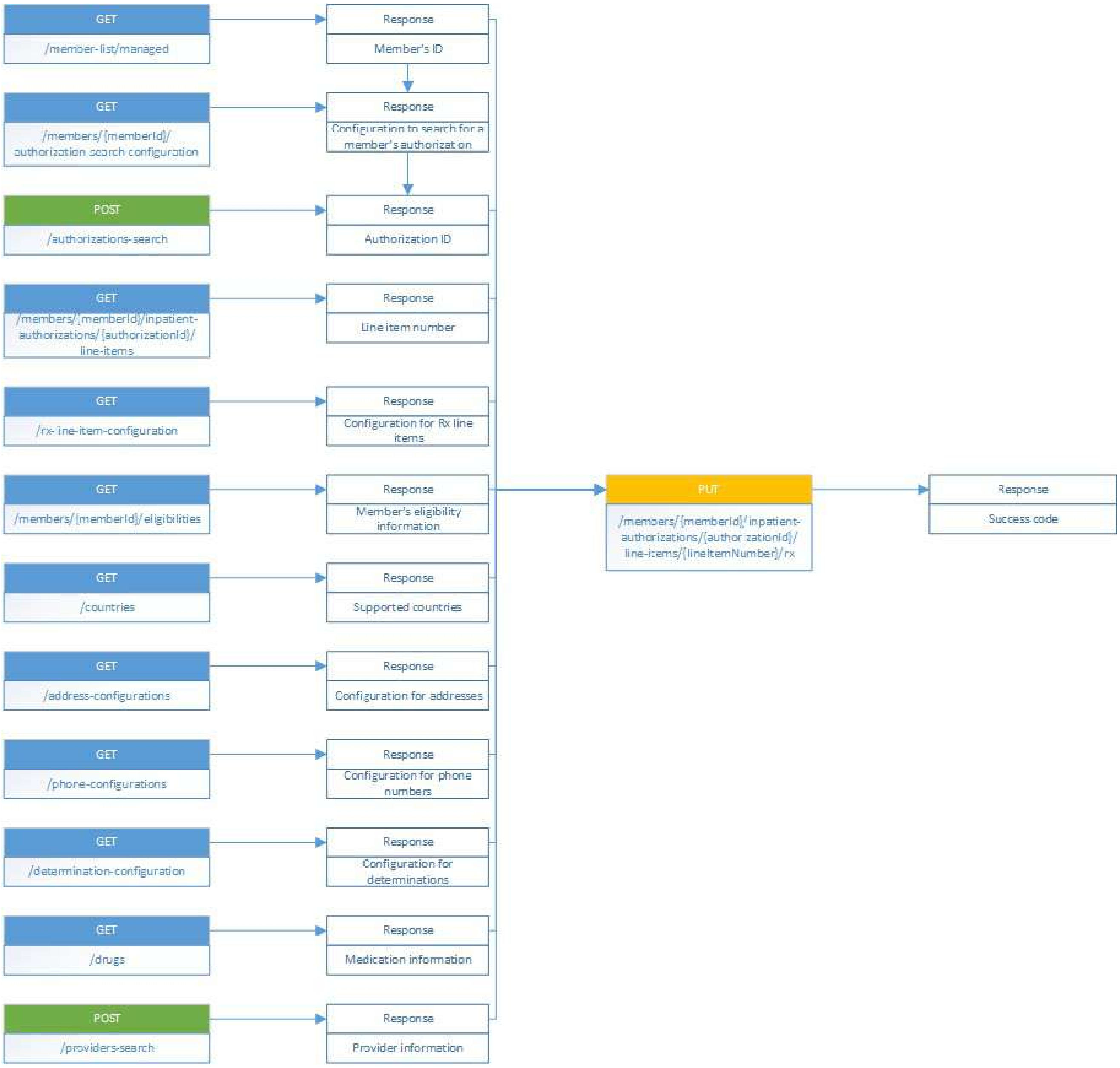
You may need to update an Rx line item on an inpatient (IP) authorization after reviewing the line item with the member. You need specific information to use web services to update an Rx line item on a member's IP authorization.

To update the Rx line item, you need the following information:

- Member ID
- IP authorization ID
- Line item number
- Configuration to update the Rx line item
- Member's eligibility information
- Information on the supported countries (optional)

- Configuration for addresses (optional)
- Configuration for phone numbers (optional)
- Configuration for determinations (optional)
- Information on medications (optional)
- Provider information (optional)

The following graphic shows how to use web services to update an Rx line item on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve and update the Rx line item.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to update.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/line-items web service to retrieve the line items on the IP authorization.

6. Store the number of the line item.
7. Use the GET /rx-line-item-configuration web service to retrieve the configuration to update an Rx line item.
8. Use the member ID and the GET /members/{memberId}/eligibilities web service to retrieve the member's eligibility information.
9. (Optional) If updating international addresses or phone numbers, use the GET /countries web service to retrieve information on the supported countries.
10. (Optional) If adding or updating addresses, use the GET /address-configurations web service and the country information, if applicable, to retrieve the configuration to add or update an address.
11. (Optional) If adding or updating phone numbers, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration to add or update an address.
12. (Optional) If including or updating the determination on the line item, use the GET / determination- configuration web service to retrieve the configuration to create or update the determination on the line item.
13. (Optional) If updating the medication information on the line item, use the GET /drugs web service to retrieve the appropriate medication information.
14. (Optional) If updating the provider on the line item, search for the appropriate provider to use on the line item.

    Refer to Search for a provider [231] on page 301 for more information.
15. Use the member ID, the authorization ID, the line item number, the updated line item information, and the

PUT /members/{memberId}/inpatient-authorizations/{authorizationId}/line-items/

{lineItemNumber}/rx web service to update the Rx line item on the IP authorization.

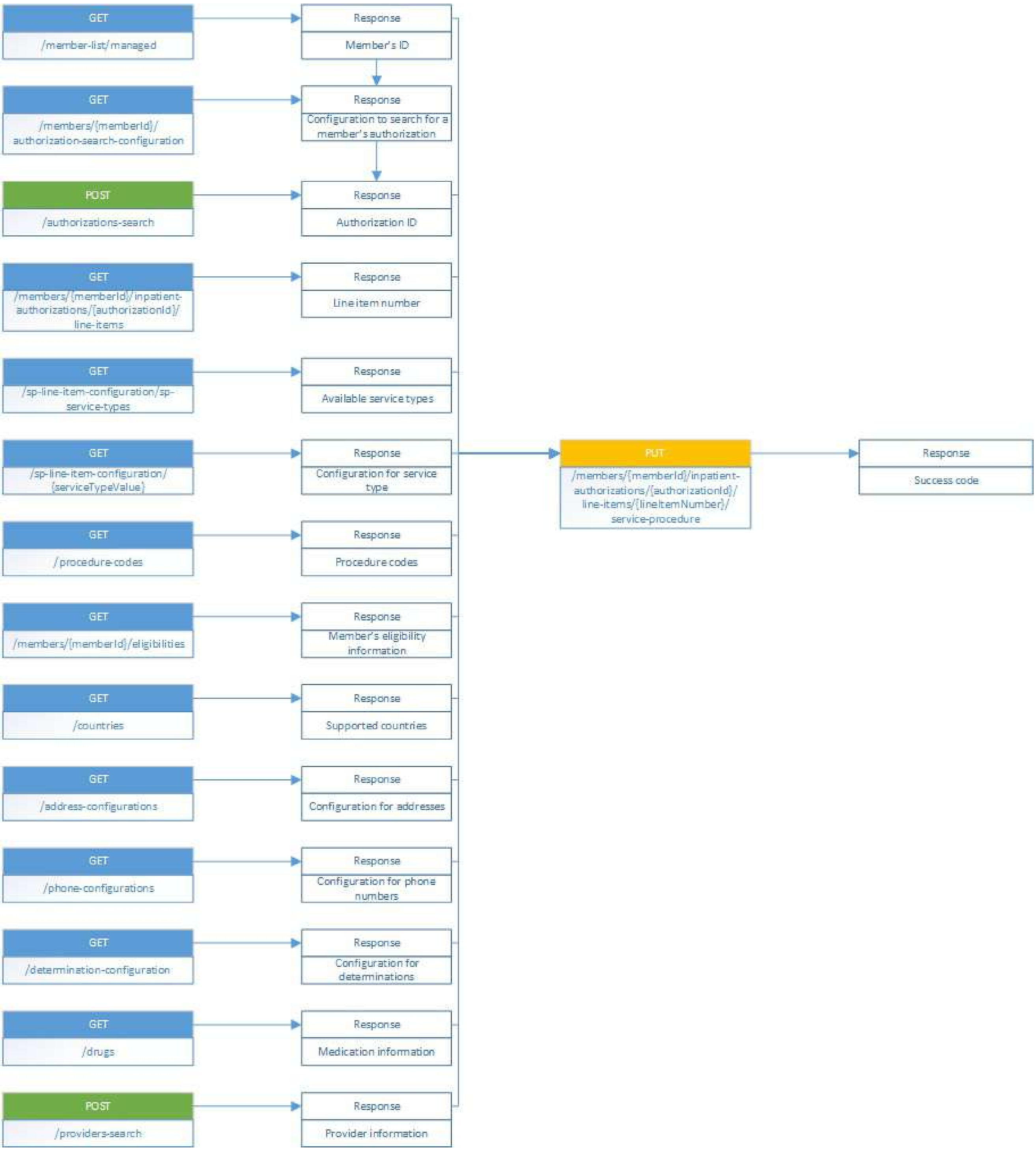
Update a service/procedure (SP) line item on an inpatient (IP) authorization

You may need to update a service/procedure (SP) line item on an inpatient (IP) authorization after reviewing the line item with the member. You need specific information to use web services to update an SP line item on a member's IP authorization.

To update the SP line item, you need the following information:

- Member ID
- IP authorization ID
- Line item number
- Existing information on the SP line item
- Available service types (optional)
- Configuration for the service type
- Procedure code information (optional)
- Member's eligibility information
- Information on the supported countries (optional)
- Configuration to add or update an address (optional)
- Configuration to add or update a phone number (optional)
- Configuration to determine the line item (optional)
- Medication information (optional)
- Provider information (optional)

The following graphic shows how to use web services to update an SP line item on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve and update the authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to update.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/line-items web service to retrieve the current line items on the IP authorization.
6. Store the number of the line item you want to update.

7. (Optional) To change the service type one the line item, use the GET /sp-line-item-configuration/sp-service-types web service to retrieve information on the available service types.
8. (Optional) To update values for the existing service type or to retrieve the configuration for an updated service type, use the GET /sp-line-item-configuration/{serviceTypeValue} web service to retrieve the configuration for the provided service type.
9. (Optional) If updating the procedure information on the line item, use the GET /procedure-codes web service to retrieve the appropriate procedure information.
10. Use the member ID and the GET /members/{memberId}/eligibilities web service to retrieve the member's eligibility information.
11. (Optional) If adding or updating international addresses or phone numbers, use the GET / countries

    web service to retrieve information on the supported countries.
12. (Optional) If adding or updating an address, use the GET /address-configurations web service and the country information, if applicable, to retrieve the configuration to add or update an address.
13. (Optional) If adding or updating a phone number, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration to add or update a phone number.
14. (Optional) If including or updating the determination information on the line item, use the GET / determination-configuration web service to retrieve the configuration for determining line items.
15. (Optional) If including medications on the line item, use the GET /drugs web service to retrieve the appropriate medication information.
16. (Optional) If updating the provider or facility, search for the appropriate provider. Refer to Search for a provider [231] on page 301 for more information.
17. Use the member ID, the authorization ID, the line item number, the updated line item number, and the PUT /members/{memberId}/inpatient-authorizations/{authorizationId}/line-items/{lineItemNumber}/service-procedure web service to update the SP line item on the IP authorization.

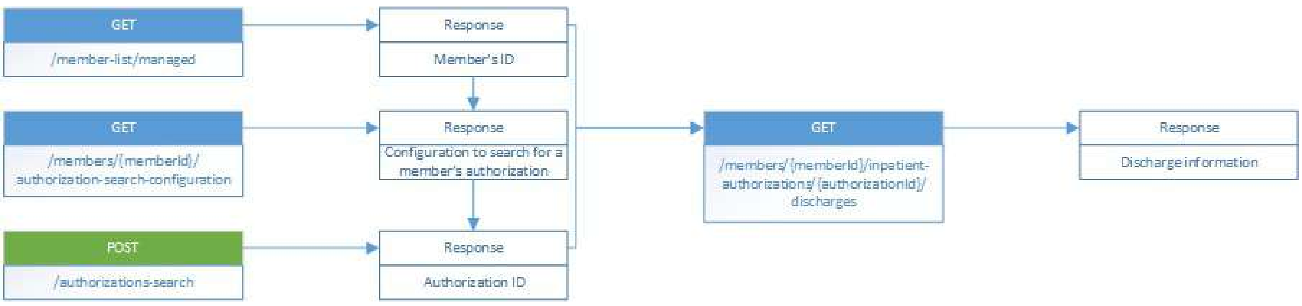
Get the discharge information on an inpatient (IP) authorization

You may need to review the discharge information on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the discharges on a member's IP authorization.

To retrieve the discharge information, you need the following information:

- Member ID
- IP authorization ID

The following graphic shows how to use web services to retrieve the discharges on a member's IP authorization.



1. Retrieve the member ID to retrieve the authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to view in detail.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/ inpatient- authorizations/{authorizationId}/discharges web service to retrieve the discharge information on the IP authorization.

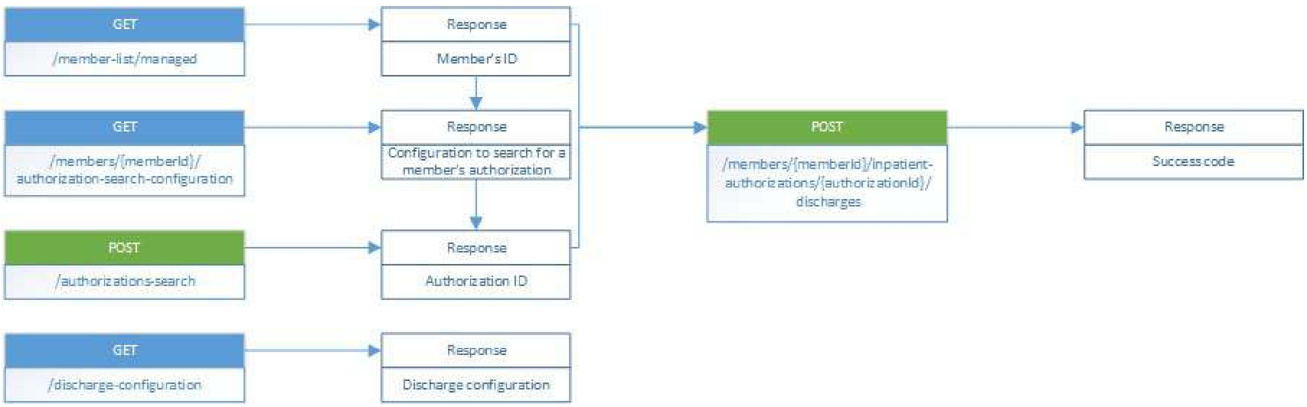
Create a discharge on an inpatient (IP) authorization

You may need to discharge an inpatient (IP) authorization after reviewing the authorization with the member. You need specific information to use web services to create a discharge on a member's IP authorization.

To create a discharge, you need the following information:

- Member ID
- IP authorization ID
- Previous discharge information
- Configuration to discharge an IP authorization

The following graphic shows how to use web services to create a discharge on a member's IP authorization.



1. Retrieve the member ID to retrieve and update the IP authorization.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.
3. Search for the authorization you want to update.

   Refer to Search for a member's authorization [75] for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/discharges web service to retrieve any previous discharges on the authorization.
6. Use the GET /discharge-configuration web service to retrieve the configuration to discharge the authorization.
7. Use the member ID, the authorization ID, the discharge information, and the POST / members/{member Id}/inpatient-authorizations/{authorizationId}/discharges web service to discharge an IP authorization.

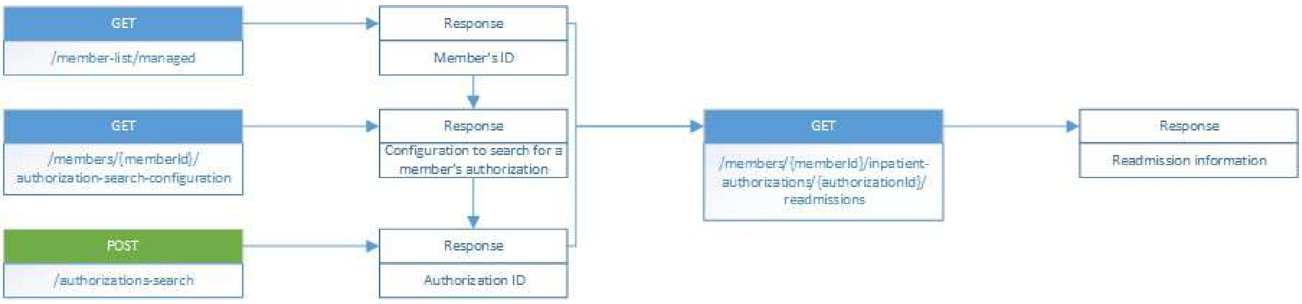
Get the readmissions on an inpatient (IP) authorization

You may need to review the readmission information on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the readmissions on a member's IP authorization.

To retrieve the readmission information, you need the following information:

- Member ID
- IP authorization ID

The following graphic shows how to use web services to retrieve the readmission information on a member's IP authorization.



1. Retrieve the member ID to retrieve the authorization and the associated readmissions.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to review.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/readmissions web service to retrieve the readmission on the IP authorization.

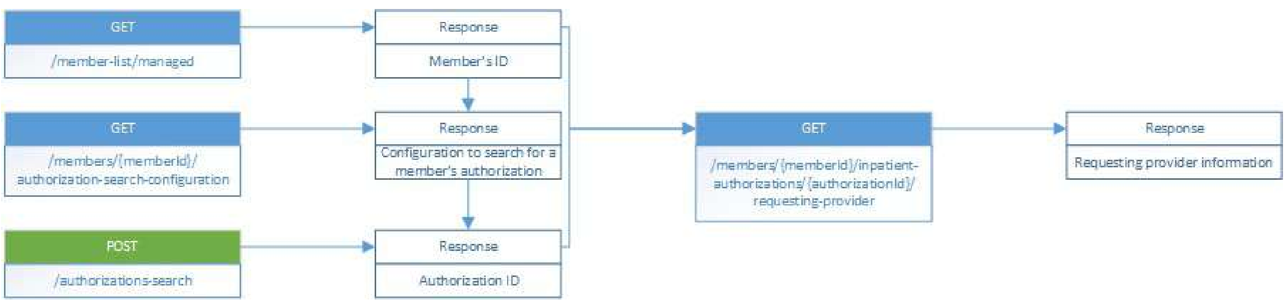
Get the requesting provider on an inpatient (IP) authorization

You may need to review the requesting provider on an inpatient (IP) authorization with the member. You need specific information to use web services to retrieve the requesting provider on a member's IP authorization.

To retrieve the requesting provider, you need the following information:

- Member ID
- IP authorization ID

The following graphic shows how to use web services to retrieve the requesting provider on a member's IP authorization.



1. Retrieve the member ID to retrieve the authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to review.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/requesting-provider web service to retrieve the requesting provider on the IP authorization.

Key metrics

You can use web services to interact with a member's key metrics.

The following sections describes how to use web services to interact with a member's key metrics. For example, you can use web services to create a key metric and to void a key metric.

Topics in this section

Search for a member's key metric [159] on page 210

You may need to search for a member's key metric to review it with the member. You need specific information to use web services to search for a member's key metric.

Get the details on a key metric [160] on page 211

You may need to retrieve the details on a key metric to review it with the member. You need specific information to use web services to retrieve the details on a member's key metric.

Create a key metric [160] on page 212

You can create a key metric after an appointment with the member. You need specific information to use web services to create a key metric for a member.

Void a key metric [161] on page 213

You may need to void a key metric after reviewing it with the member. You need specific information to use web services to void a member's key metric.

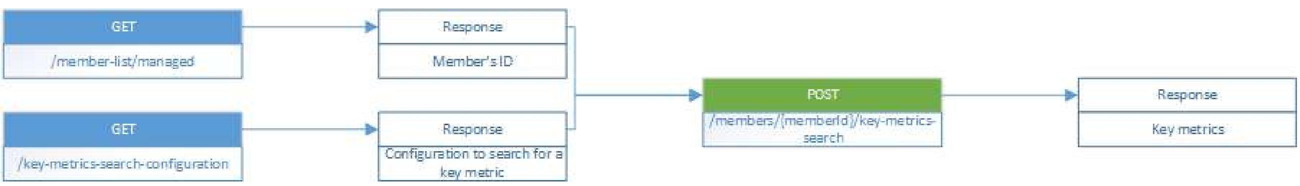
Search for a member's key metric

You may need to search for a member's key metric to review it with the member. You need specific information to use web services to search for a member's key metric.

To search for a member's key metric, you need the following information:

- Member ID
- Configuration to complete a search

The following graphic shows how to use web services to search for a member's key metric.



1. Retrieve the member ID to be used in the search.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.

3. Use the GET /key-metrics-search-configuration web service to retrieve the configuration to complete the search.
4. Use the member ID, the search criteria, and the POST /members/{memberId}/key-metrics-search web service to search for a member's key metric.

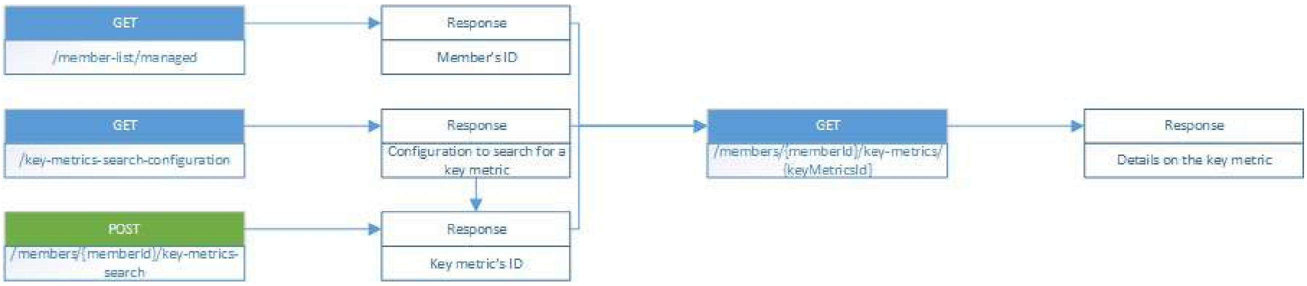
Get the details on a key metric

You may need to retrieve the details on a key metric to review it with the member. You need specific information to use web services to retrieve the details on a member's key metric.

To retrieve the details, you need the following information:

- Member ID
- Key metric ID

The following graphic shows how to use web services to retrieve the details on a member's key metric.



1. Retrieve the member ID to use to get the details.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the key metric you want to view in detail.

   Refer to Search for a member's key metric [159] on page 210 for more information.
4. Store the key metric ID.
5. Use the member ID, the key metric ID, and the GET /members/{memberId}/key-metrics/{key MetricId} web service to retrieve the details.

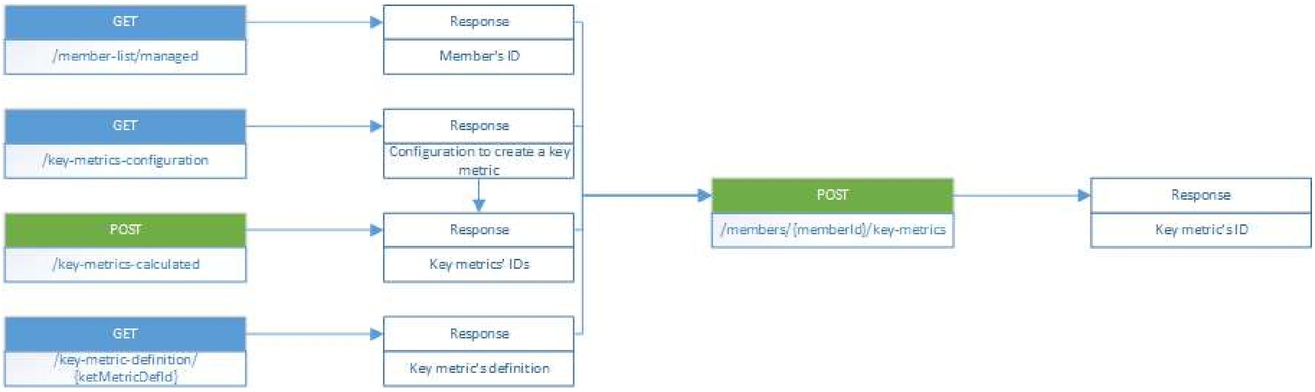
Create a key metric

You can create a key metric after an appointment with the member. You need specific information to use web services to create a key metric for a member.

To create a key metric, you need the following information:

- Member ID
- Configuration to create a key metric
- Available key metrics for the member
- Definition of the key metric

The following graphic shows how to use web services to create a key metric for a member.



1. Retrieve the member ID to create the key metric.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.
3. Use the GET /key-metric-configuration web service to retrieve the configuration to create a key metric.
4. Use the POST /key-metric-calculated web service to retrieve the available key metrics for the member.
5. Store the key metric ID you want to create.
6. Use the key metric ID and the GET /key-metric-definitions/{keyMetricDefId} web service to retrieve the definition for the key metric.
7. Use the member ID, the key metric's information, and the POST /members/{memberId}/key- metrics web service to create a key metric.

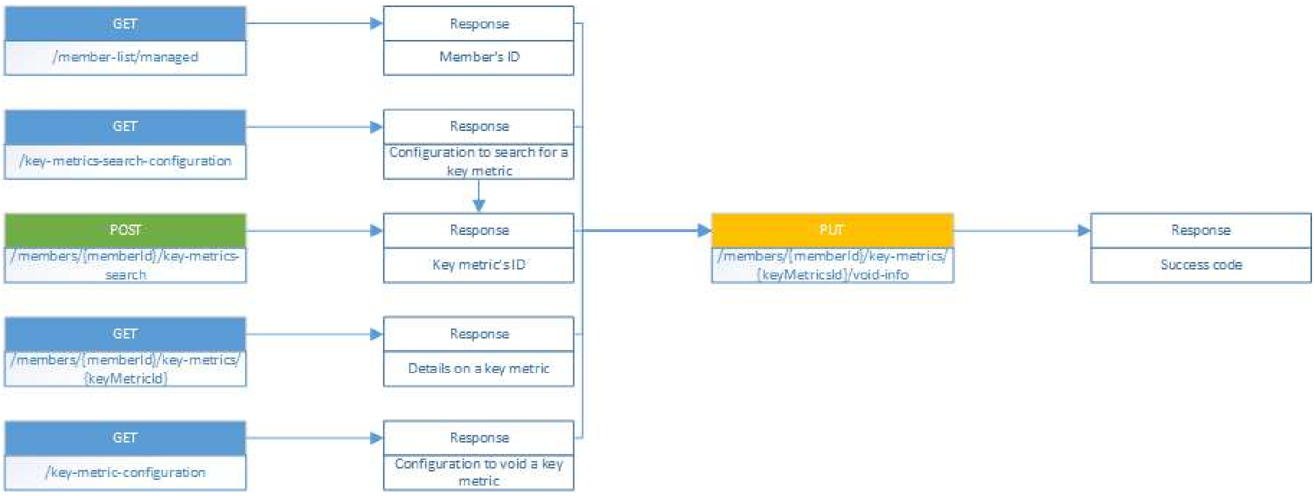
Void a key metric

You may need to void a key metric after reviewing it with the member. You need specific information to use web services to void a member's key metric.

To void a key metric, you need the following information:

- Member ID
- Key metric ID
- Details on the key metric
- Configuration to void the key metric

The following graphic shows how to use web services to void a member's key metric.



1. Retrieve the member ID to be used to retrieve and void the key metric.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.

2. Store the member ID.
3. Search for the key metric you want to void.

   Refer to Search for a member's key metric [159] on page 210 for more information.
4. Store the key metric ID.
5. Use the member ID, the key metric ID, and the GET /members/{memberId}/key-metrics/{key MetricId} web service to retrieve the details on the key metric.
6. Use the GET /key-metric-configuration web service to retrieve the configuration to void a key metric.
7. Use the member ID, the key metric ID, the void information, and the PUT /members/{memberId}/ key-metrics/{keyMetricId}/void-info web service to void the key metric.

Medications

You can use web services to interact with a member's medications.

The following sections describe how to use web services to interact with a member's medications. For example, you can create and void a medication.

Topics in this section

You can search for a member's list of medications to determine if you need to add or update a medication. You need specific information to use web services to search for a member's medication.

You can retrieve the details on a medication to review it with the member. You need specific information to use web services to retrieve the details on a member's medication.

You can retrieve the medication's regimen to review it with the member. You need specific information to use web services to retrieve the medication's regimen.

You can create a medication after a meeting with the member. You need specific information to use web services to create a medication for a member.

You can void a medication after reviewing it with the member. You need specific information to use web services to void a member's medication.

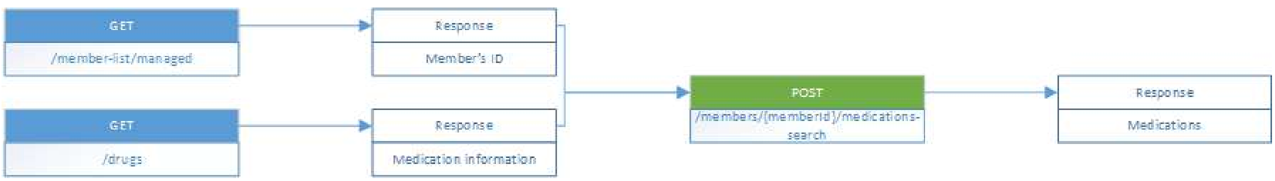
Search a member's medications

You can search for a member's list of medications to determine if you need to add or update a medication. You need specific information to use web services to search for a member's medication.

To search a member's medications, you need the following information:

- Member ID
- Drug code

The following graphic shows how to use web services to search for a member's medication.



1. Retrieve the member ID to use in the search.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. (Optional) Use the GET /drugs web service to retrieve the information on the drug to use in the search.
4. Use the member ID, the drug information, any additional search criteria, and the POST /members/

{memberId}/medications-search web service to search the member's medications.

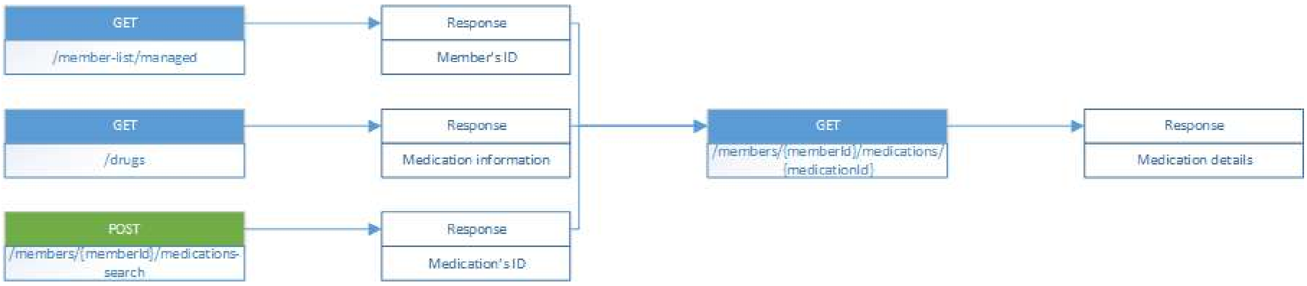
Get the details on a medication

You can retrieve the details on a medication to review it with the member. You need specific information to use web services to retrieve the details on a member's medication.

To get the details, you need the following information:

- Member ID
- Medication ID

The following graphic shows how to use web services to retrieve the details on a member's medication.



1. Retrieve the member ID to use it to retrieve the medication.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the medication you want to view.

   Refer to Search a member's medications [162] on page 214 for more information.
4. Store the medication ID.
5. Use the member ID, the medication ID, and the GET /members/{memberId}/medications/

{medicationId} web service to retrieve the medication's details.

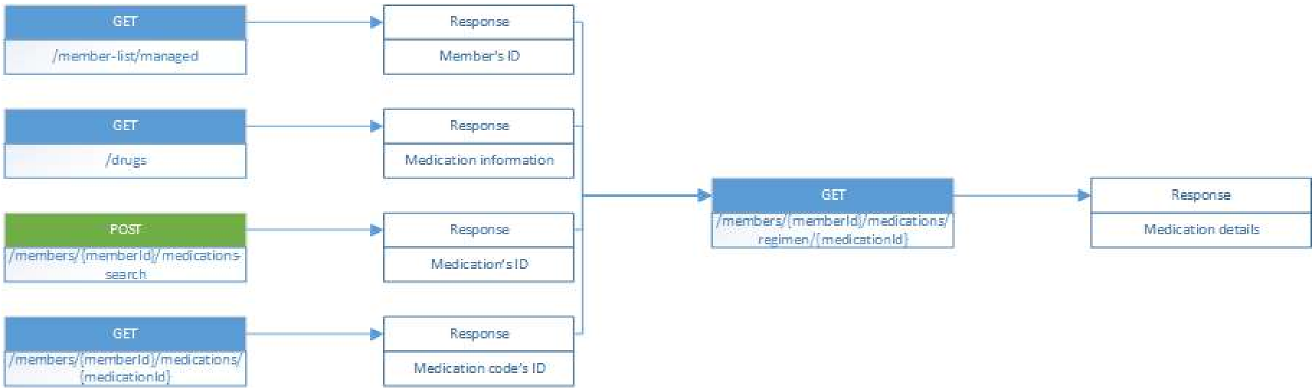
Get the medication's regimen

You can retrieve the medication's regimen to review it with the member. You need specific information to use web services to retrieve the medication's regimen.

To retrieve the regimen, you need the following information:

- Member ID
- Medication ID
- Medication code ID

The following graphic shows how to use web services to retrieve a regimen for a member's medication.



1. Retrieve the member ID to use to retrieve the regimen.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the medication you want to review.

   Refer to Search a member's medications [162] on page 214 for more information.
4. Store the medication ID.
5. Use the member ID, the medication ID, and the GET /members/{memberId}/medications/{medicationId} web service to retrieve the medication's details.
6. Store the medication code ID.
7. Use the member ID, the medication code ID, and the GET /members/{memberId}/medications/ regimen/{medicationCodeId} web service to retrieve the medication's regimen.

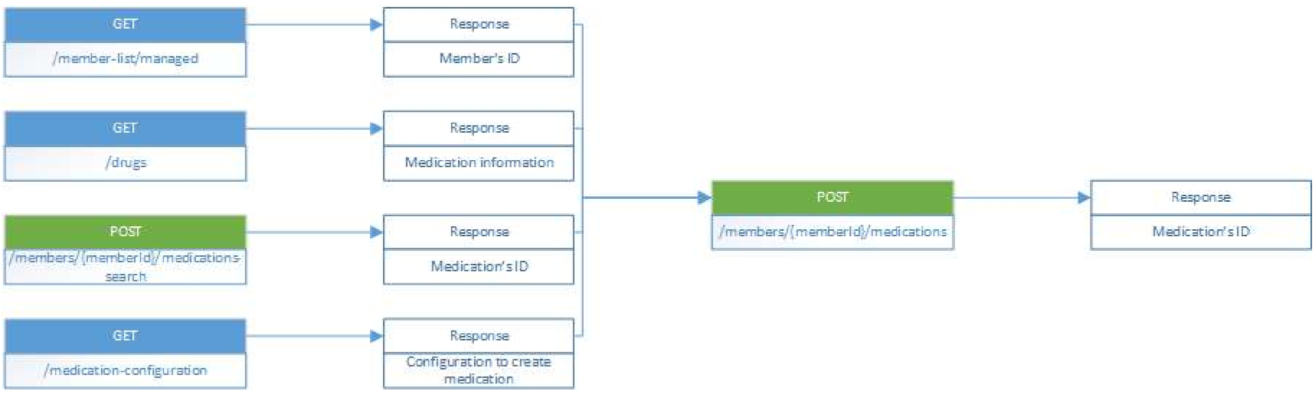
Create a medication

You can create a medication after a meeting with the member. You need specific information to use web services to create a medication for a member.

To create a medication, you need the following information:

- Member ID
- Information on the medication
- Configuration to create a medication

The following graphic shows how to use web services to create a medication for a member.



1. Retrieve the member ID to use it to create the medication.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the GET /drugs web service to retrieve the appropriate medication.
4. Store the drug's information.

5. Use the GET /medication-configuration web service to retrieve the configuration to create a medication.
6. Use the member ID, the drug information, and the POST /members/{memberId}/ medications web service to create the member's medication.

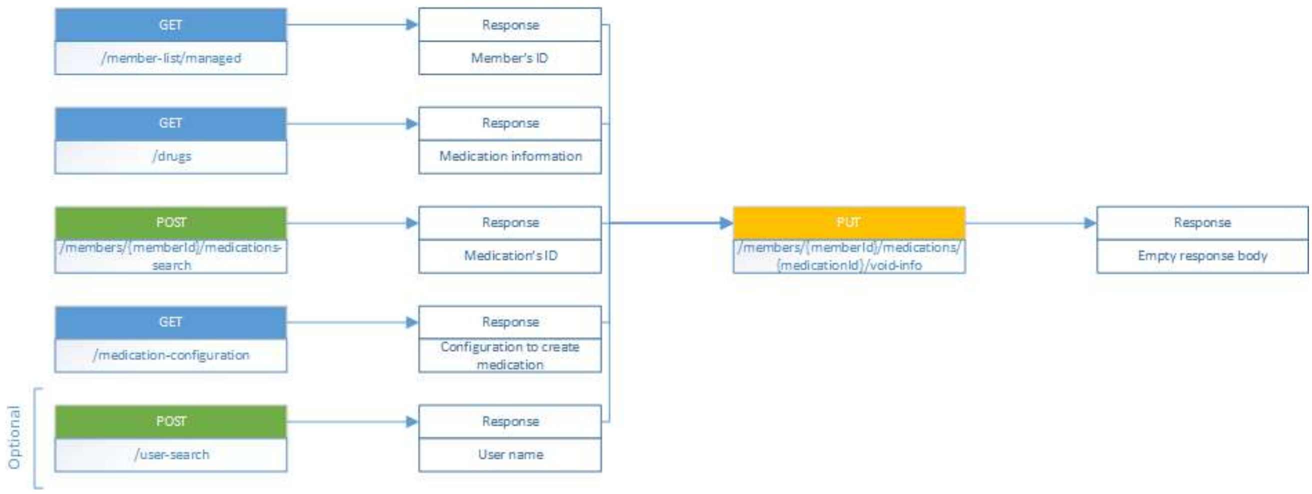
Void a medication

You can void a medication after reviewing it with the member. You need specific information to use web services to void a member's medication.

To void the medication, you need the following information:

- Member ID
- Medication ID
- Configuration to void a medication
- Information on the user that authorized voiding the medication (optional)

The following graphic shows how to use web services to void a member's medication.



1. Retrieve the member ID to use to retrieve and void the medication.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the medication you want to void.

   Refer to Search a member's medications [162] on page 214 for more information.
4. Store the medication ID.
5. Use the GET /medication-configuration web service to retrieve the configuration to void a medication.
6. (Optional) If a different user authorized voiding the medication, search for the appropriate user. Refer to Search for a user [297] on page 387 for more information.
7. Use the member ID, the medication ID, the void information, and the PUT /members/ {memberId}/ medications/{medicationId}/void-info web service to void the medication.

Member list

You can use web services to interact with member lists.

The following sections describe how to use web services to interact with member lists. For example, you can use web services to retrieve and update the managed member list.

Topics in this section

You can review the members on their managed member list. You can use web services to retrieve the managed members list.

Update the managed members list [166] on page 219

After reviewing their managed members list, you can add or remove members from the list. You need specific information to use web services to update the managed members list.

Add a member to the managed members list [166] on page 220

After reviewing your managed members list, you can add a member to the list. You need specific information to use web services to add a member to the managed members list.

Remove a member from the managed members list [167] on page 220

After reviewing your managed member list, you may need to remove a member from the list. You need specific information to use web services to remove a member from your managed members list.

Get a managed members list

You can review the members on their managed member list. You can use web services to retrieve the managed members list.

The following graphic shows how to use web services to retrieve the list of managed members.

Use the GET /member-list/managed web service to retrieve information on the members in their managed members list.

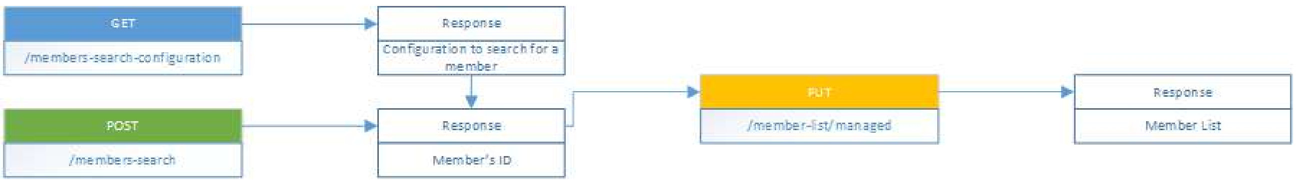
Update the managed members list

After reviewing their managed members list, you can add or remove members from the list. You need specific information to use web services to update the managed members list.

To update the managed member list, you need the following information:

- Member ID

The following graphic shows how to use web services to update your managed members list.



1. Retrieve the existing managed members list using the GET /member-list/managed web service.
2. Search for the members you want to add or remove from the managed member list. Refer to Search for a member [168] on page 221 for more information.
3. Store the members' IDs.
4. Use the list of members' IDs and the PUT /member-list/managed web service to update the managed member list.

Add a member to the managed members list

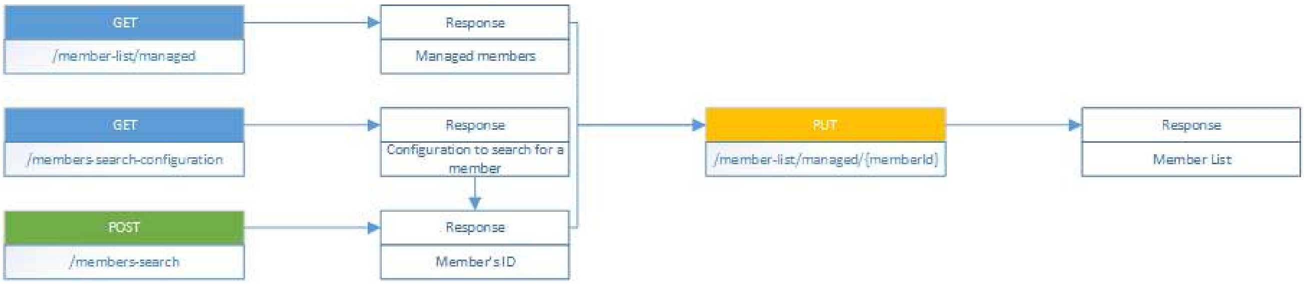
After reviewing your managed members list, you can add a member to the list. You need specific information to use web services to add a member to the managed members list.

To add a member, you need the following information:

- Existing managed members list

- Information on the member you want to add

The following graphic shows how to use web services to add a member to your managed members list.



1. Use the GET /member-list/managed web service to retrieve the current managed member list.
2. Search for the member you want to add to the list.

   Refer to Search for a member [168] for more information.
3. Store the identifying information on the member.
4. Use the member's information and the PUT /member-list/managed/{memberId} web service to add the member to the managed member list.

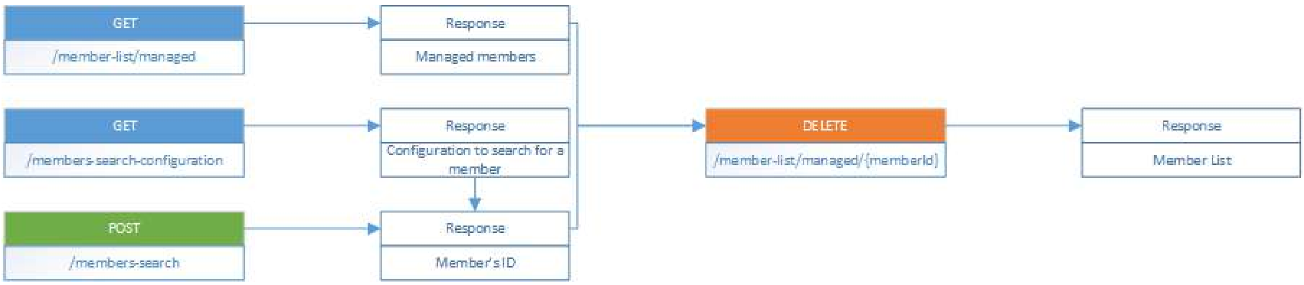
Remove a member from the managed members list

After reviewing your managed member list, you may need to remove a member from the list. You need specific information to use web services to remove a member from your managed members list.

To remove a member, you need the following information:

- Existing managed members list
- Information on the member to be removed

The following graphic shows how to use web services to remove a member from your managed members list.



1. Use the GET /member-list/managed web service to retrieve the current managed members list.
2. Store the ID of the member you want to remove from the list.
3. Use the member ID and the DELETE /member-list/managed/{memberId} web service to remove the member from the list.

Member search

You can use web services to search for a member.

The following section describes how to use web services to search for a member. You can use the member's ID to interact with any of the member's associated artifacts (for example, care plans and authorizations).

Topics in this section

You can search for a member to retrieve the member's information. You need specific information to use the web services to search for a member.

Search for a member

You can search for a member to retrieve the member's information. You need specific information to use the web services to search for a member.

To search for a member, you need the following information:

- Configuration to complete a search

The following graphic shows how to use web services to search for a member.

1. Use the GET /members-search-configuration web service to retrieve the configuration to search for a member.
2. Use the configuration and the POST /members-search web service to search for the member.

Members

You can interact directly with the members' records.

The following sections show how to use web services to create a record for the member.

Topics in this section

You can create a record for the member. You need specific information to use the web services to create a member record.

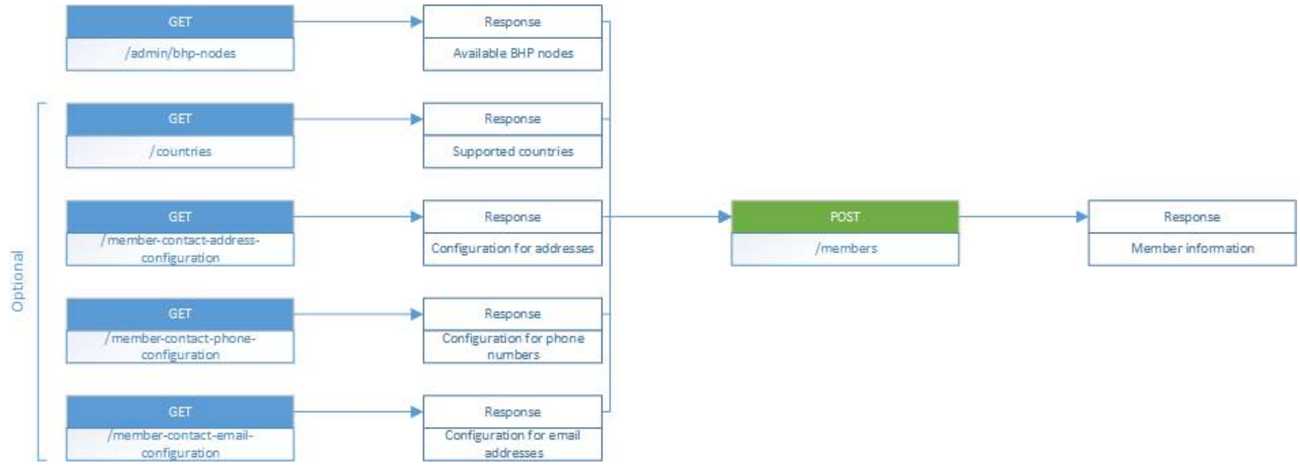
Create a member record

You can create a record for the member. You need specific information to use the web services to create a member record.

To create a record, you need the following information:

- Information from the member
- BHP node
- Information on the supported countries (optional)
- Configuration for addresses (optional)
- Configuration for phone numbers (optional)
- Configuration for emails (optional)

The following graphic shows how to use web services to create a member record.



1. Record basic information about the member.

   For example, the member's first and list name and the member's date of birth.
2. Use the GET /admin/bhp-node web service to retrieve BHP nodes to assign it to the member.
3. (Optional) If including an international address or phone number, use the GET /countries web service to retrieve information on the supported countries.
4. (Optional) If including addresses, use the GET /member-contact-address-configuration web service to retrieve the configuration to create addresses.
5. (Optional) If including phone numbers, use the GET /member-contact-phone-configuration web service to retrieve the configuration to create phone numbers.
6. (Optional) If including email addresses, use the GET /member-contact-email-configuration web service to retrieve the configuration to create email addresses.
7. Use the member's information and the POST /members web service to create a member record.

Networks

You can use web services to interact with a member's networks.

The following sections describe how to use web services to interact with a member's networks. For example, you can retrieve a summary of the member's networks.

Topics in this section

You can use web services to retrieve the member's network information. You need specific information to use the web services to retrieve the member's network information.

Get the member's networks

You can use web services to retrieve the member's network information. You need specific information to use the web services to retrieve the member's network information.

To retrieve the member's networks, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve the member's network.

1. Retrieve the member ID to retrieve the associated network'.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.

2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/networks web service to get the information on the member's network.

Notes

You can use web services to interact with a member's notes.

The following describes how to use web services to interact with a member's notes. For example, you can use web services to create a note, to create a comment on a note, and to add an attachment to a note.

Topics in this section

Search for a note [171] on page 225

You can search for a note to review it with the member. You need specific information to use the web services to search for a member's note.

Get the notes on the assessment header [171] on page 225

You can retrieve the notes on an assessment header so you can review the with the member. You need specific information to use the web services to retrieve the notes on the header of a member's assessment.

Create a note on an assessment header [172] on page 226

You can create a note on an assessment header after reviewing the assessment with the member. You need specific information to use the web services to create a note on the header of a member's assessment.

Get the notes on an assessment's question group [173] on page 227

You can get the notes on a question group while reviewing the assessment with the member. You need specific information to use the web services to retrieve the notes on a question group within the member's assessment.

Create a note on an assessment's question group [173] on page 228

You can create a note on a question group while completing or reviewing the assessment with the member. You need specific information to use the web services to create a note on a question groups within a member's assessment.

Get the details on a note [174] on page 230

You can retrieve the details on a note to review them with the member. You need specific information to use the web services to retrieve the details on a member's note.

Update the linked artifact on a note [175] on page 230

You can update the linked case or authorization on a note. You need specific information to use the web services to update the links on a member's note.

Create a comment on a note [176] on page 231

You can add a comment to a note after reviewing the note with the member. You need specific information to use the web services to create a comment on a member's note.

Create an attachment on a note [176] on page 232

You can create an attachment on a note after reviewing the note with the member. You need specific information to use the web services to create an attachment on a member's note.

Create a note [177] on page 233

You may need to create a note after a meeting with the member. You need specific information to use the web services to create a note for a member.

Void a note [179] on page 235

You may need to void a note if it was recorded erroneously. You need specific information to use web services to void a member's note.

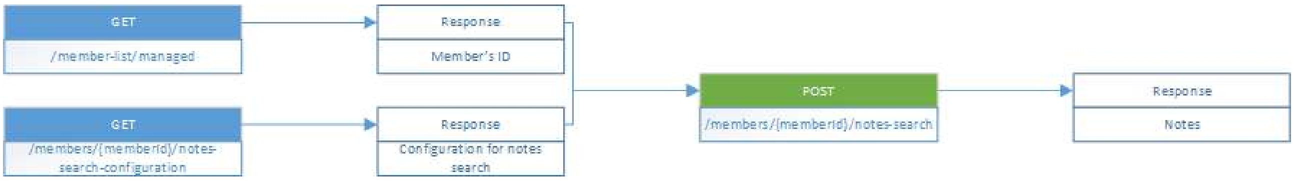
Search for a note

You can search for a note to review it with the member. You need specific information to use the web services to search for a member's note.

To search for a note, you need the following information:

- Member ID
- Configuration for the search

The following graphic shows how to use web services to search for a member's note.



1. Retrieve the member ID to be used in the search.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/notes-search-configuration web service to retrieve the configuration to search for the note.
4. Use the member ID, the search criteria, and the POST /members/{memberId}/notes-search web services to search for a note.

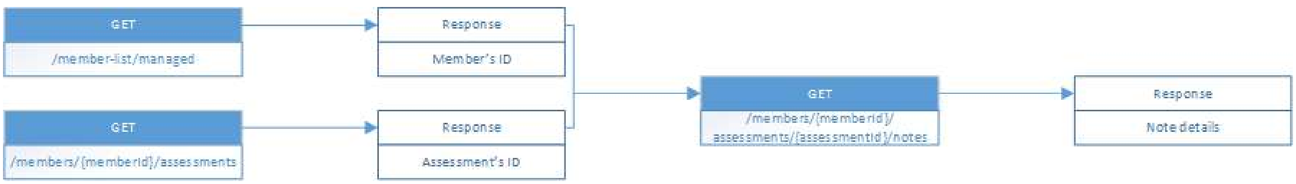
Get the notes on the assessment header

You can retrieve the notes on an assessment header so you can review the with the member. You need specific information to use the web services to retrieve the notes on the header of a member's assessment.

To retrieve the notes on the assessment header, you need the following information:

- Member ID
- Assessment ID

The following graphic shows how to use web services to retrieve the notes on a member's assessment header.



1. Retrieve the member ID to retrieve the assessment and the associated notes.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/assessments web service to retrieve a summary of the member's assessments.
4. Store the ID of the assessment you want to review.
5. Use the member ID, the assessment ID, and the GET /members/{memberId}/assessments/

{assessmentId}/notes web service to retrieve the notes on the assessment header.

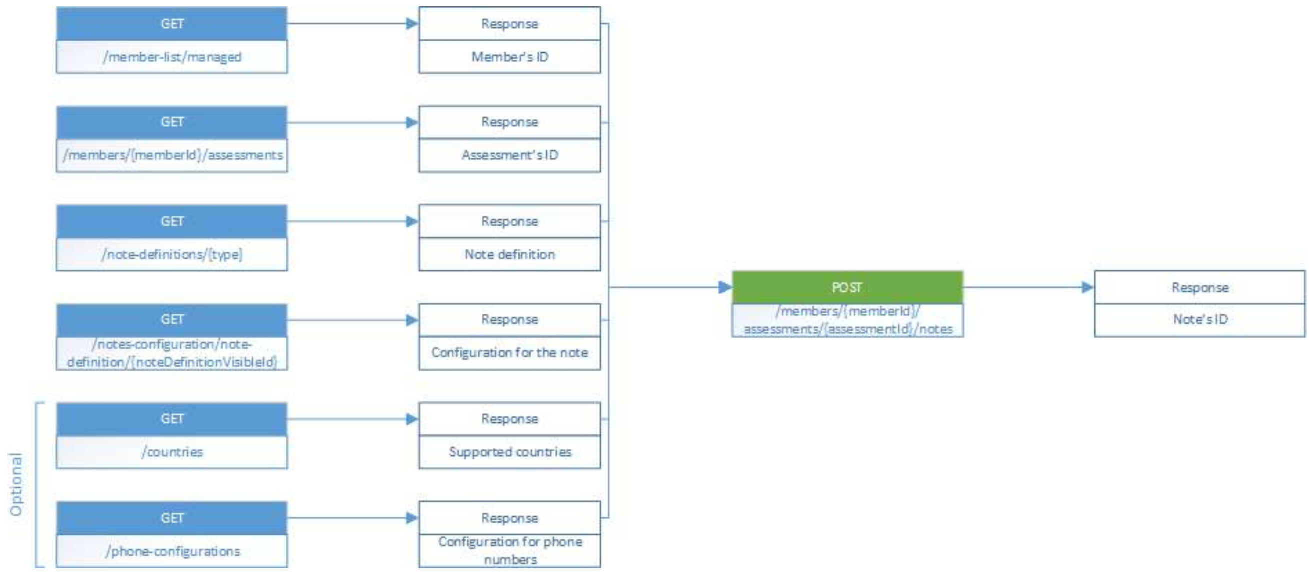
Create a note on an assessment header

You can create a note on an assessment header after reviewing the assessment with the member. You need specific information to use the web services to create a note on the header of a member's assessment.

To create a note on an assessment header, you need the following information:

- Member ID
- Assessment ID
- Definition for the note
- Configuration for the note
- Information on the supported countries (optional)
- Configuration for phone numbers (optional)

The following graphic shows how to use web services to create a note on a member's assessment header.



1. Retrieve the member ID to create the note.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/assessments web service to retrieve the ID of the assessment to be updated.
4. Store the assessment ID.
5. Use the GET /note-definitions/{type} web service with the type ASSESSMENT to get the definition for the note.
6. Store the visible ID of the note you want to create.
7. Use the ID of the note definition and the GET /notes-configuration/note-definition/{note DefinitionVisibleId} web service to retrieve the configuration for the note.
8. (Optional) If including an international phone number on the note, use the GET /countries web service to retrieve the information on the supported countries.
9. (Optional) If including a phone number on the note, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration to create a phone number.
10. Use the member ID, the note information, and the POST /members/{memberId}/ assessments/

{assessmentId}/notes web service to create a note on the assessment header.

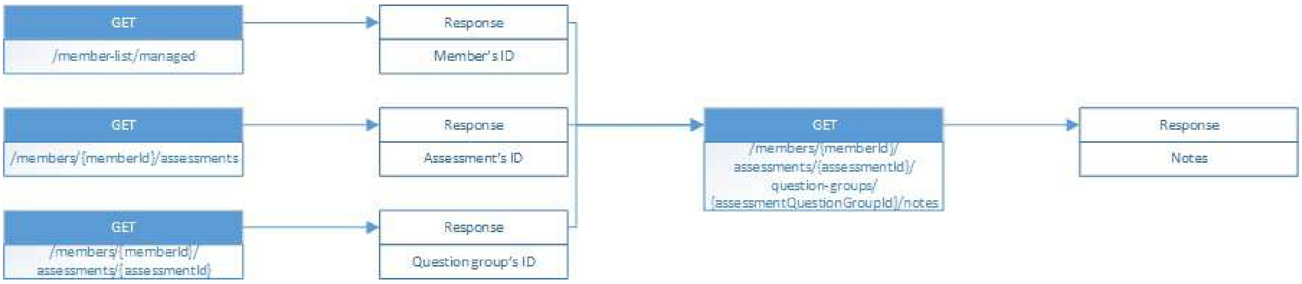
Get the notes on an assessment's question group

You can get the notes on a question group while reviewing the assessment with the member. You need specific information to use the web services to retrieve the notes on a question group within the member's assessment.

To get the notes on an assessment's question group, you need the following information:

- Member ID
- Assessment ID
- Question group ID

The following graphic shows how to use web services to retrieve the notes on a question group on a member's assessment.



1. Retrieve the member ID to be used to retrieve the assessment and the associated notes.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/assessments web service to retrieve the ID of the assessment you want to view in detail.
4. Store the assessment ID.
5. Use the member ID, the assessment ID, and the GET /members/{memberId}/assessments/{assessmentId} web service to retrieve the ID of the question group that has the note.
6. Store the question group ID.
7. Use the member ID, the assessment ID, the question group ID, and the GET /members/{memberId}/ assessments/{assessmentId}/question-groups/{assessmentQuestionGroupId}/notes web service to retrieve the notes on the question group.

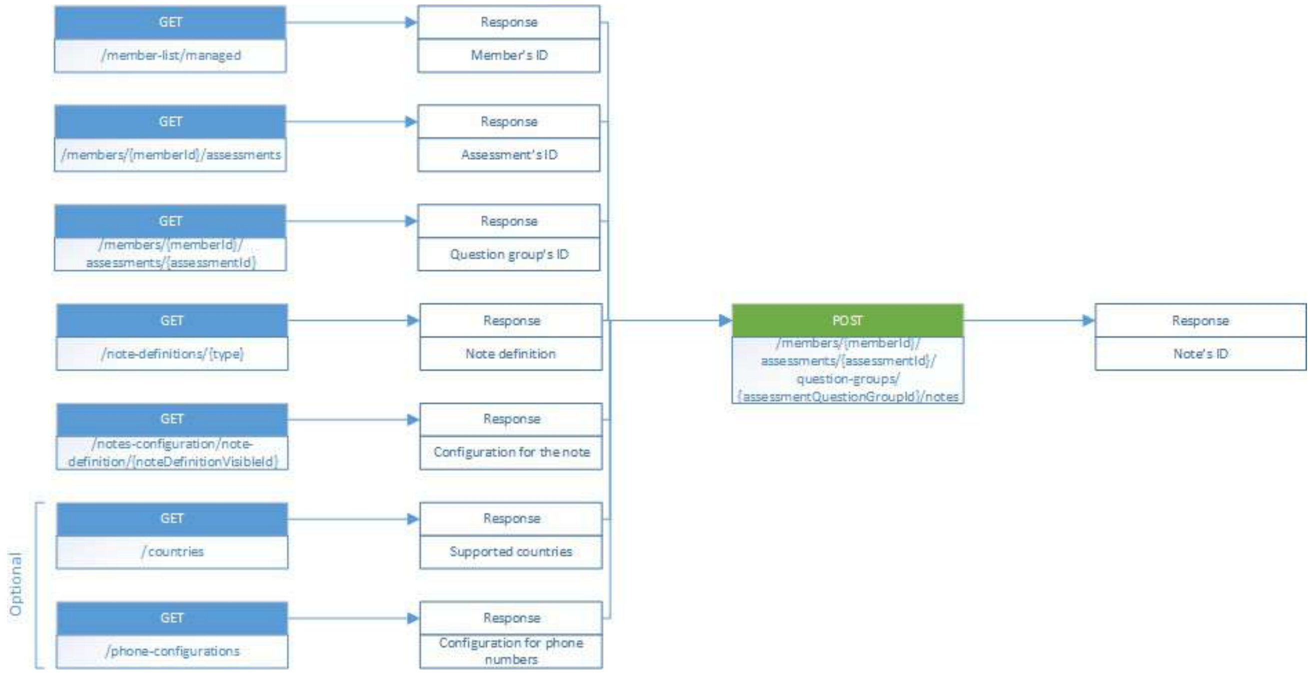
Create a note on an assessment's question group

You can create a note on a question group while completing or reviewing the assessment with the member. You need specific information to use the web services to create a note on a question groups within a member's assessment.

To create a note on a question group, you need the following information:

- Member ID
- Assessment ID
- Question group ID
- Definition of the note
- Configuration for the note
- Information on the supported countries (optional)
- Configuration for phone numbers (optional)

The following graphic shows how to use web services to create a note on a question group on a member's assessment.



1. Retrieve the member ID to retrieve and update the assessment's question group.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/assessments web service to retrieve the ID of the assessment you want to update.
4. Store the assessment ID.
5. Use the member ID, the assessment ID, and the GET /members/{memberId}/assessments/{assessmentId} web service to retrieve the ID of the question group you want to update.
6. Store the question group ID.
7. Use the GET /note-definitions/{type} web service with the type QUESTION_GROUP to get the definition of the note.
8. Store the visible ID of the note you want to create.
9. Use the ID of the note definition and the GET /notes-configuration/note-definition/{note DefinitionVisibleId} web service to retrieve the note's configuration.
10. (Optional) If including an international phone number on the note, use the GET /countries web service to retrieve the information on the supported countries.
11. (Optional) If including a phone number on the note, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration to create a phone number.
12. Use the member ID, the assessment ID, the question group ID, the note information, and the POST / members/{memberId}/assessments/{assessmentId}/question-groups/{assessment QuestionGroupId}/notes web service to create a note on an assessment's question group.

Get the details on a note

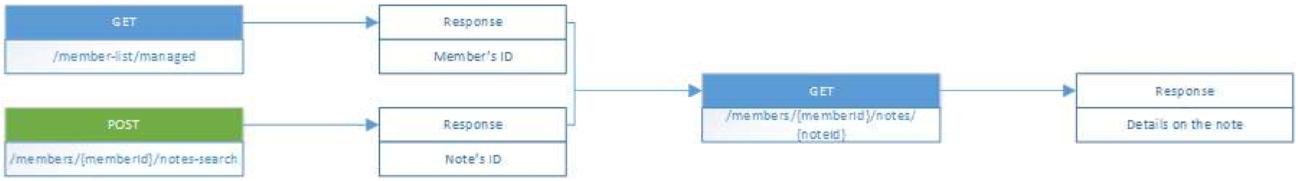
You can retrieve the details on a note to review them with the member. You need specific information to use the web services to retrieve the details on a member's note.

To retrieve the details, you need the following information:

- Member ID

- Note ID

The following graphic shows how to use web services to retrieve the details on a member's note.



1. Retrieve the member ID to search and to retrieve the note.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Search for the note you want to view in detail.

   Refer to Search for a note [171] on page 225 for more information.
3. Store the note ID.
4. Use the member ID, the note ID, and the GET /members/{memberId}/notes/{noteId} web service to retrieve the note's details.

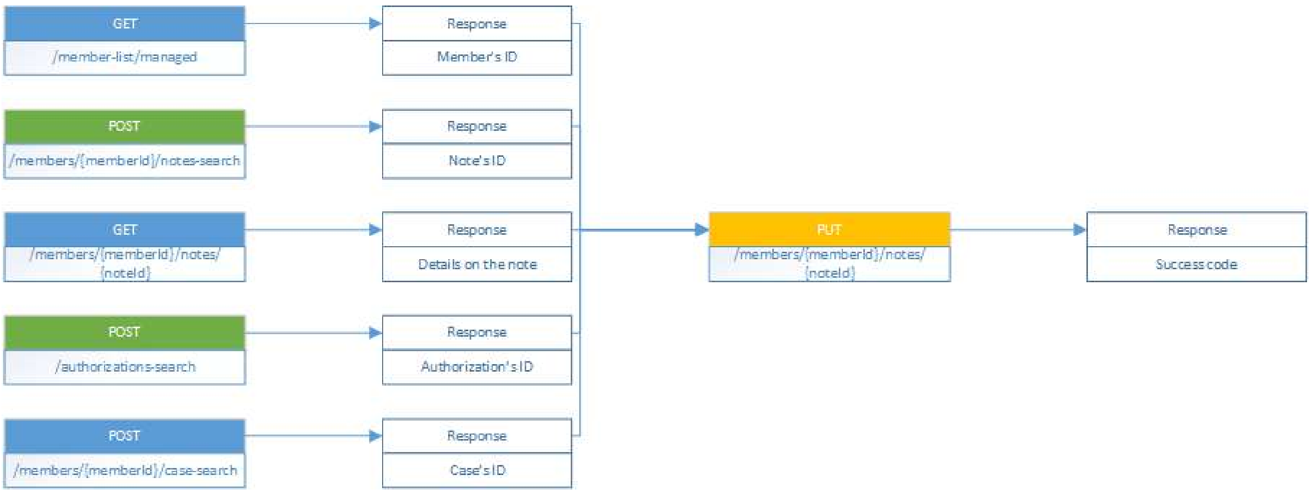
Update the linked artifact on a note

You can update the linked case or authorization on a note. You need specific information to use the web services to update the links on a member's note.

To update the link, you need the following information:

- Member ID
- Note ID
- Details on the note
- Information on the case (optional)
- Information on the authorization (optional)

The following graphic shows how to use web services to update the link on a member's note.



1. Retrieve the member ID to be used to retrieve and update the note.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Search for the note you want to update.

   Refer to Search for a note [171] on page 225 for more information.
3. Store the ID of the note you want to update.
4. Use the member ID, the note ID, and the GET /members/{memberId}/notes/{noteId} web service to retrieve the note's details.

5. (Optional) If updating the case or linking a case to the note, search for the case to be linked. Refer to Search a member's cases [114] on page 151 for more information.
6. (Optional) If updating the authorization or linking an authorization to the note, search for the authorization to be linked.

   Refer to Search for a member's authorization [75] on page 101 for more information.
7. Use the member ID, the note ID, the information on the artifact to be linked to the note, and the PUT / members/{memberId}/notes/{noteId} web service to update the note's associated artifact.

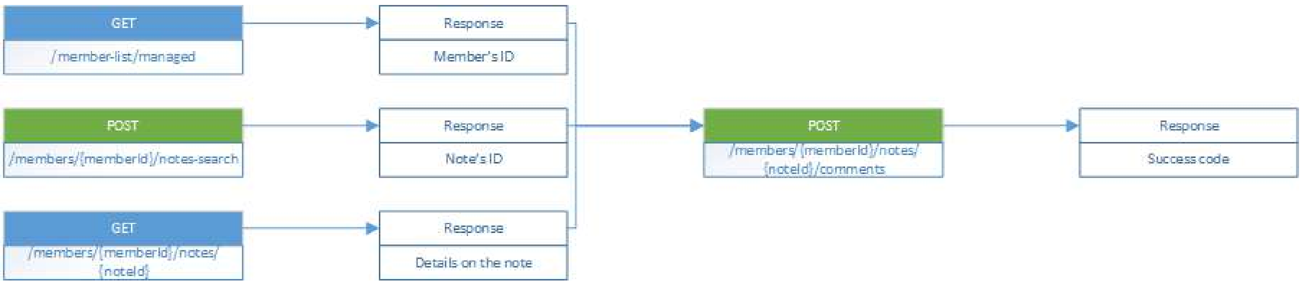
Create a comment on a note

You can add a comment to a note after reviewing the note with the member. You need specific information to use the web services to create a comment on a member's note.

To create a comment on a note, you need the following information:

- Member ID
- Note ID
- Details on the note

The following graphic shows how to use web services to create a comment on a member's note.



1. Retrieve the member ID to be used to retrieve and update the note.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Search for the note you want to update.

   Refer to Search for a note [171]for more information.
3. Store the note ID.
4. Use the member ID, the note ID, and the GET /members/{memberId}/notes/{noteId} web service to retrieve the note's details.
5. Use the member ID, the note ID, the comment, and the POST /members/{memberId}/notes/{note Id}/comments web service to create a comment on the note.

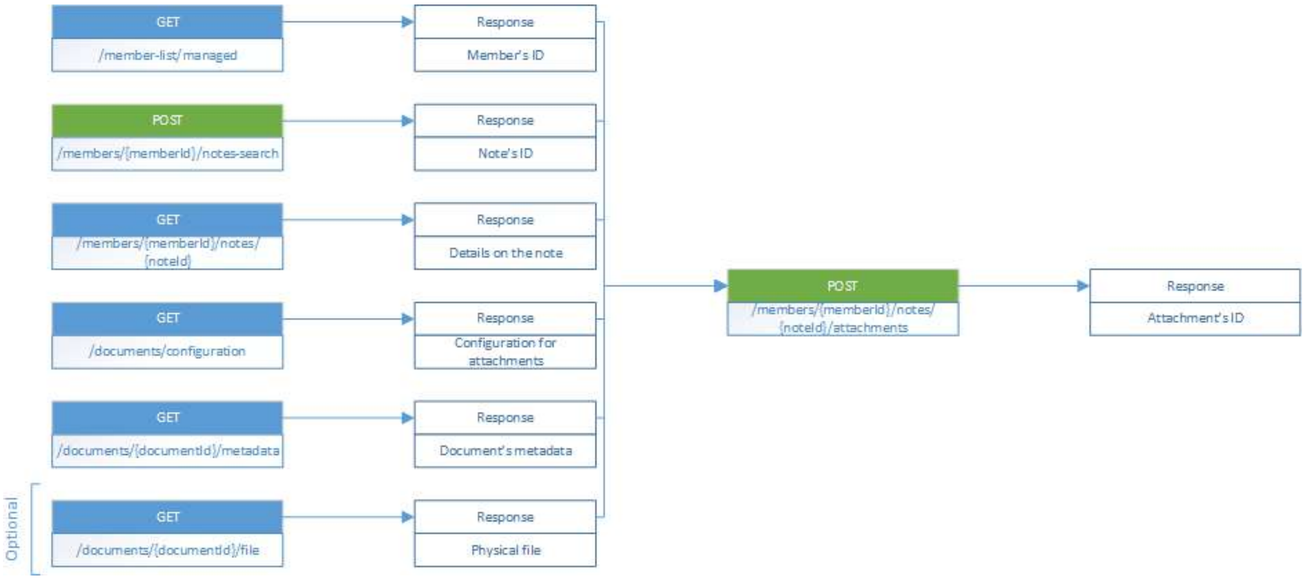
Create an attachment on a note

You can create an attachment on a note after reviewing the note with the member. You need specific information to use the web services to create an attachment on a member's note.

To create an attachment, you need the following information:

- Member ID
- Note ID
- Configuration for attachments
- Attachment metadata
- Physical file (optional)

The following graphic shows how to use web services to create an attachment on a member's note.



1. Retrieve the member ID to retrieve and update the note.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the note you want to update.

   Refer to Search for a note [171] on page 225 for more information.
4. Store the note ID.
5. Use the GET /documents/configuration web service to retrieve the configuration to create an attachment.
6. Use the GET /documents/{documentId}/metadata web service to retrieve the attachment metadata.
7. (Optional) If attaching a physical file (instead of a URL) to the note, use the GET /documents/

   {documentId}/file web service to retrieve the physical file.
8. Use the member ID, the note ID, the configuration, the attachment metadata, the attachment's physical file (if applicable), and the POST /members/{memberId}/notes/{noteId}/attachments web service to create an attachment on the note.

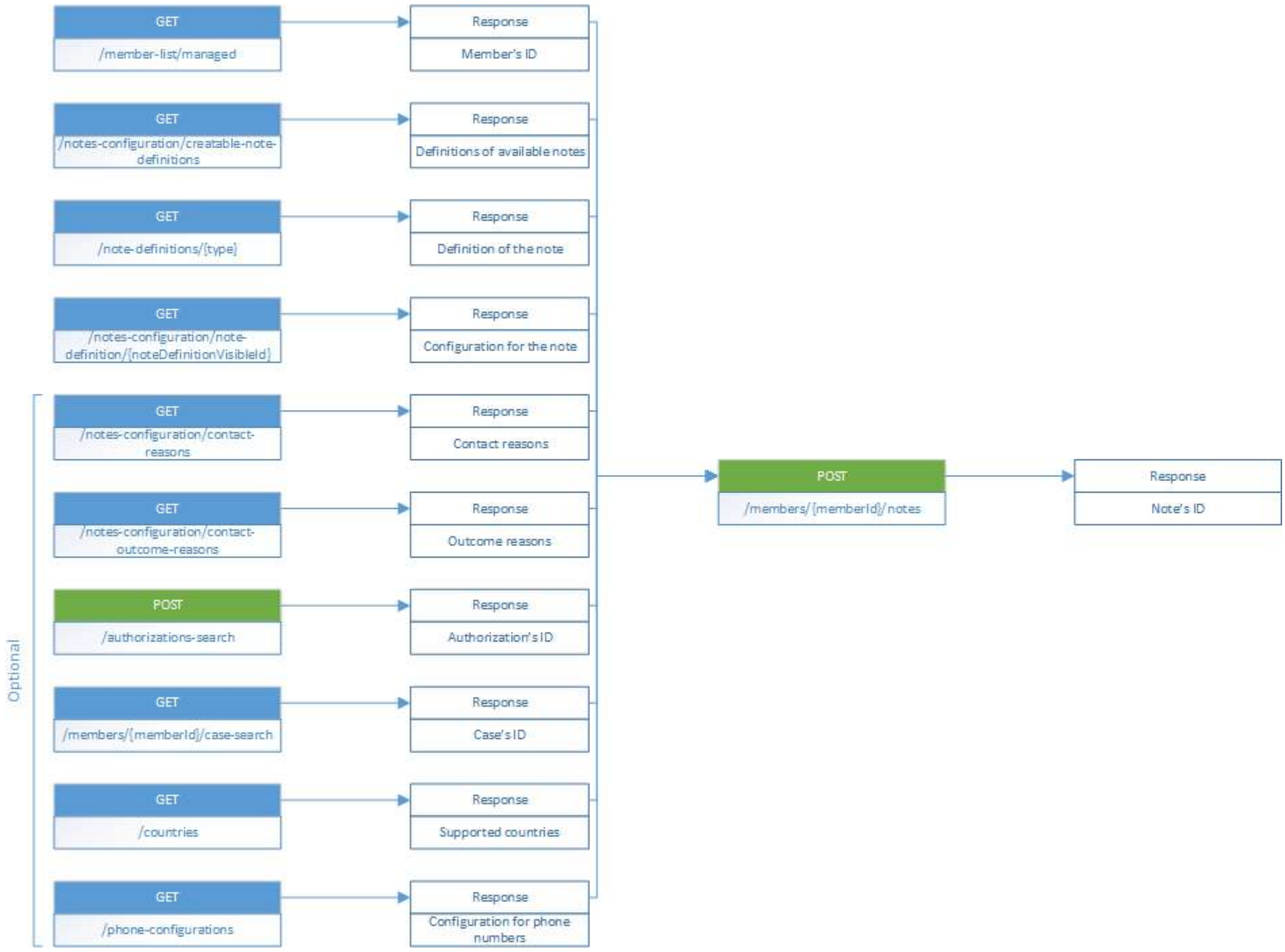
Create a note

You may need to create a note after a meeting with the member. You need specific information to use the web services to create a note for a member.

To create a note, you need the following information:

- Member ID
- Member ID type - defaults to INTERNAL
- Definitions for notes you can create
- Definition for the note
- Configuration for the note
- Contact reasons (optional)
- Contact outcomes (optional)
- Case or authorization to link to the note (optional)
- Information on the supported countries (optional)
- Configuration for phone numbers (optional)

The following graphic shows how to use web services to create a note for a member.



1. Retrieve the member ID to be used to create a note.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the GET /notes-configuration/creatable-note-definitions web service to retrieve the names and the ID of the notes you can create.
4. Use the type of note you want to create and the GET /note-definitions/{type} web service to get the note's definition.
5. Store the visible ID of the note.
6. Use the ID of the note and the GET /notes-configuration/note-definition/{note DefinitionVisibleId} web service to retrieve the note's configuration.
7. (Optional) If creating an inbound note or an outbound note, use the GET /notes-configuration/ contact-reasons web service to get the contact reasons for the note.
8. (Optional) If creating an outbound note, use the GET /notes-configuration/contact-outcome-reasons web service to get the contact outcomes for the note.
9. (Optional) If linking the note to a case or to an authorization, search for the appropriate artifact to link to the note.

   Refer to Search a member's cases [114] on page 151 or Search for a member's authorization [75] on page 101 for more information.
10. (Optional) If including an international phone number on the note, use the GET /countries web service to retrieve information for the supported countries.
11. (Optional) If including a phone number on a note, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration for phone numbers.
12. Use the member ID, the note's information, and the POST /members/{memberId}/notes web service to create the note.

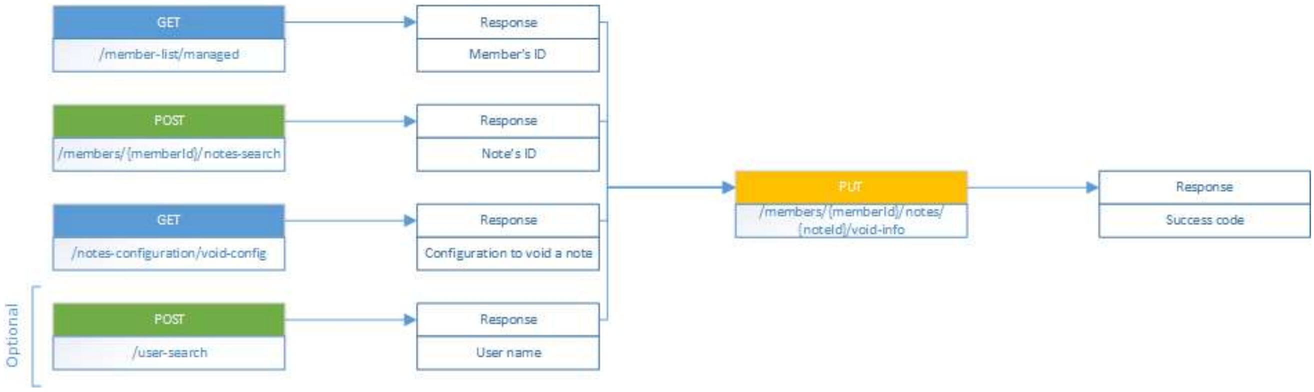
Void a note

You may need to void a note if it was recorded erroneously. You need specific information to use web services to void a member's note.

To void a note, you needs the following information:

- Member ID
- Note ID
- Configuration to void a note
- User who authorized voiding the note (optional)

The following graphic shows how to use web services to void a note.



1. Retrieve the member ID to use to retrieve and void the medication.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the note you want to void.

   Refer to Search for a note [171] on page 225 for more information.
4. Store the note ID.
5. Use the GET /notes-configuration/void-config web service to retrieve the configuration to void a note.
6. (Optional) If you did not authorize voiding the note, search for the appropriate user. Refer to Search for a user [297] on page 387 for more information.
7. Use the member ID, the note ID, the void information, and the PUT /members/{memberId}/ notes/

{noteId}/void-info web service to void the member's note.

Operations on a member

You can use web services to interact with a member's profile information.

The following sections show how to use web services to interact with a member's profile. For example, you can create a member's opt out preference, update a member's general information, and update a member's contact times.

Topics in this section

Get the member's header information [181] on page 238

You may need to review the member's header information (a summary of important member-specific information). You need specific information to use the web services to retrieve the member's header information.

Get the member's details [181] on page 238

You may need to review the member's martial status, gender, and primary care physician with the member. You need specific information to use the web services to retrieve the member's details.

Update the member's details [182] on page 239

After reviewing the member's details (for example, primary care physician, martial status, configured user- defined fields), you may need to update the user-defined fields. You need specific information to use the web services to update the member's details.

Update the member's opt out status [182] on page 240

You may need to update a member's profile to indicate they have opted out of being contacted. You need specific information to use the web services to update the member's opt out status.

Get a member's opt out preferences [182] on page 240

You may need to determine if a member has opted out of phone contact or letter mailings before completing a task to contact the member. You need specific information to use the web services to retrieve the member's opt out preferences.

Create an opt out preference for a member [183] on page 241

After reviewing the opt out preferences with the member, you may need to create an opt out preference. You need specific information to use the web services to create an opt out preference for the member.

Update a member's opt out preference [183] on page 241

After reviewing the opt out preferences with the member, you may need to update a preference. You need specific information to use the web services to update the member's opt out preference.

Delete a member's opt out preference [184] on page 242

After reviewing the opt out preferences with the member, you may need to delete a preference. You need specific information to use the web services to delete a member's opt out preference.

Get a member's alerts [184] on page 243

Before working with the member's information or artifacts (for example, an authorization or care plan), you may need to determine if there are any alerts for the member. You need specific information to use the web services to retrieve the member's alerts.

Update a member's alerts [185] on page 243

After reviewing the member's current alerts, you may need to update the alert. You need specific information to use the web services to update the member's alerts.

Get a member's relationships [185] on page 244

You may need to review the member's relationships to other member's in the TruCare system. You need specific information to use the web services to retrieve the member's relationships.

Get a member's privacy information [186] on page 244

You may need to review the privacy information with the member. You need specific information to use the web services to retrieve the member's privacy information.

Get the member's MPI [186] on page 245

You may need to determine if the member has another record in TruCare. You need specific information to use web services to retrieve the member's MPI (Master Person Index).

Get a member's contact information [186] on page 245

You may need to directly contact a member. You need specific information to use web services to retrieve a summary of a member's addresses, phone numbers, and email addresses.

Get a member's general information [187] on page 246

You may need to review the member's general information (including ethnicity, race, religion, and language) with the member. You need specific information to use the web services to retrieve the member's general information.

Update a member's general information [187] on page 246

After reviewing the general information (for example, race and language) with the member, you may need to update the member's general information. You need specific information to use the web services to update the member's general information.

Get a member's contact times [188] on page 247

You may need to contact a member by phone to complete a task. You need specific information to use the web services to retrieve the member's contact times.

Update a member's contact times [188] on page 248

After reviewing the contact times with the member, you may need to update the member's contact times. You need specific information to use the web services to update the member's contact times.

Get the member's header information

You may need to review the member's header information (a summary of important member-specific information). You need specific information to use the web services to retrieve the member's header information.

To get the member's header information, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve the member's header information.

1. Retrieve the member ID to retrieve their header information.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/header web service to retrieve the member's header information.

Get the member's details

You may need to review the member's martial status, gender, and primary care physician with the member. You need specific information to use the web services to retrieve the member's details.

To get the member's details, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve the member's details.

1. Retrieve the member ID to retrieve the member's details.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/member-details web service to retrieve the member's details.

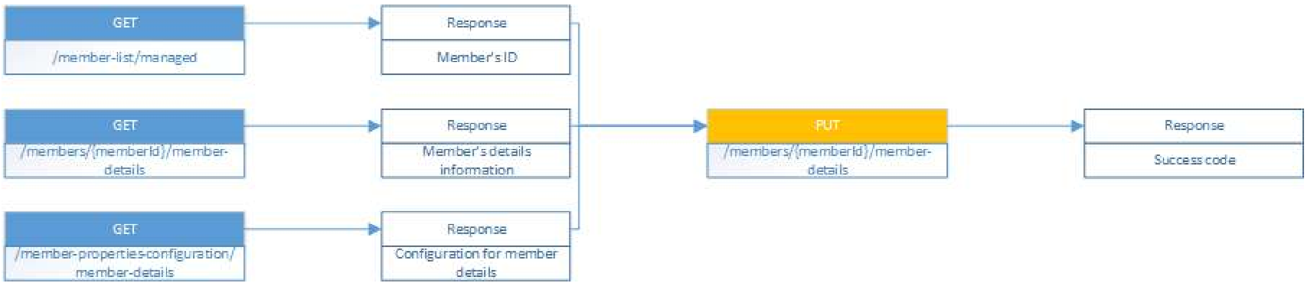
Update the member's details

After reviewing the member's details (for example, primary care physician, martial status, configured user- defined fields), you may need to update the user-defined fields. You need specific information to use the web services to update the member's details.

To update the member's details, you need the following information:

- Member ID
- Member's current details
- Configuration to update the member's details

The following graphic shows how to use web services to update the member's details.



1. Retrieve the member ID to retrieve and update their details.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/member-details web service to get the member's current details.
4. Use the GET /member-properties-configuration/member-details web service to get the configuration to update the member's details.
5. Use the member ID, the updated details, and the PUT /members/{memberId}/member-details web service to update the member's details.

Update the member's opt out status

You may need to update a member's profile to indicate they have opted out of being contacted. You need specific information to use the web services to update the member's opt out status.

To update the member's opt out status, you need the following information:

- Member ID

The following graphic shows how to use web services to update a member's opt out status.

1. Retrieve the member ID to update the member's opt out status.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the PUT /members/{memberId}/member-opt-out web service to update the member's opt out status.

Get a member's opt out preferences

You may need to determine if a member has opted out of phone contact or letter mailings before completing a task to contact the member. You need specific information to use the web services to retrieve the member's opt out preferences.

To get the member's opt out preferences, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a member's opt out preferences.

1. Retrieve the member ID to retrieve their preferences.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/opt-out-preferences web service to retrieve the member's opt out preferences.

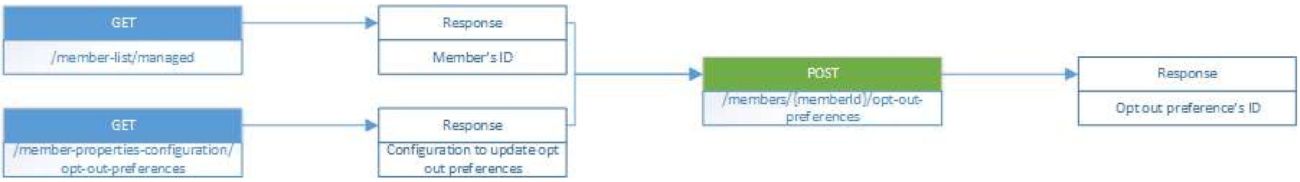
Create an opt out preference for a member

After reviewing the opt out preferences with the member, you may need to create an opt out preference. You need specific information to use the web services to create an opt out preference for the member.

To create an opt out preference, you need the following information:

- Member ID
- Configuration to create an opt out preference

The following graphic shows how to use web services to create an opt out preference for a member.



1. Retrieve the member ID that needs an opt out preference.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the GET /member-properties-configuration/opt-out-preferences web service to get the configuration to create an opt out preference.
4. Use the member ID, the opt out information, and the POST /members/{memberId}/opt-out-preferences web service to create an opt out preference for the member.

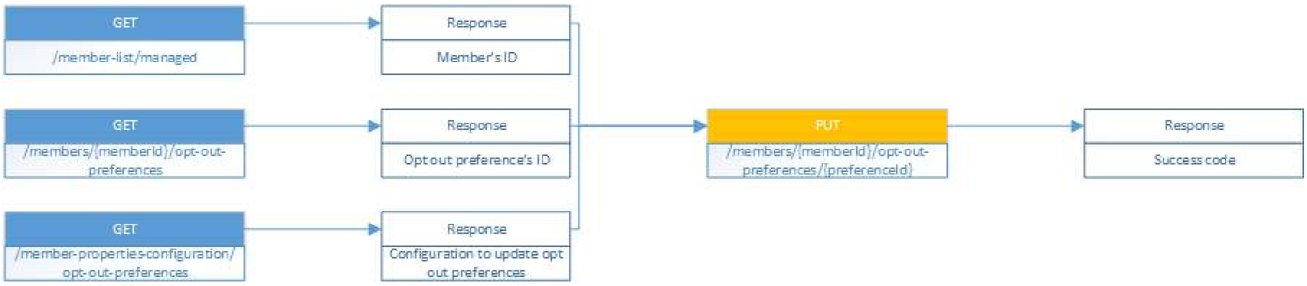
Update a member's opt out preference

After reviewing the opt out preferences with the member, you may need to update a preference. You need specific information to use the web services to update the member's opt out preference.

To update a member's opt out preference, you need the following information:

- Member ID
- Preference ID
- Configuration to update an opt out preference

The following graphic shows how to use web services to update a member's opt out preferences.



1. Retrieve the member ID to retrieve and update their opt out preference.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/opt-out-preferences web service to retrieve the member's current preferences.
4. Use the GET /member-properties-configuration/opt-out-preferences web service to retrieve the configuration to update an opt out preference.
5. Use the member ID, the preference ID, the updated opt out information, and the PUT / members/

{memberId}/opt-out-preferences/{preferenceId} web service to update the member's opt out preference.

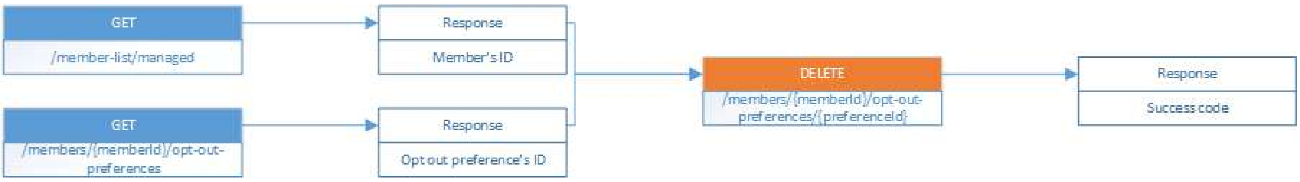
Delete a member's opt out preference

After reviewing the opt out preferences with the member, you may need to delete a preference. You need specific information to use the web services to delete a member's opt out preference.

To delete a member's opt out preference, you need the following information:

- Member ID
- Preference ID

The following graphic shows how to use web services to delete a member's opt out preference.



1. Retrieve the member ID to retrieve and delete the opt out preference.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/opt-out-preferences web service to retrieve the member's opt out preference.
4. Store the ID of the preference.
5. Use the member ID, the preference ID, and the DELETE /members/{memberId}/opt-out-preferences/{preferenceId} web service to delete the member's opt out preference.

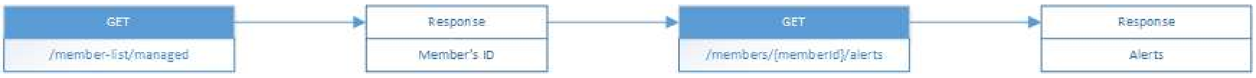
Get a member's alerts

Before working with the member's information or artifacts (for example, an authorization or care plan), you may need to determine if there are any alerts for the member. You need specific information to use the web services to retrieve the member's alerts.

To get a member's alerts, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a member's alerts.



1. Retrieve the member ID to retrieve their alerts.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/alerts web service to retrieve the member's alerts.

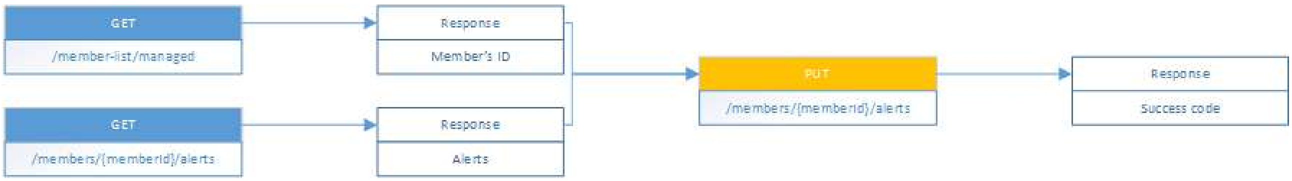
Update a member's alerts

After reviewing the member's current alerts, you may need to update the alert. You need specific information to use the web services to update the member's alerts.

To update a member's alerts, you need the following information:

- Member ID
- Current alerts

The following graphic shows how to use web services to update a member's alerts.



1. Retrieve the member ID to retrieve and update their alerts.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/alerts web service to retrieve the member's current alerts.
4. Use the member ID, the updated alert, and the PUT /members/{memberId}/alerts web service to update the member's alerts.

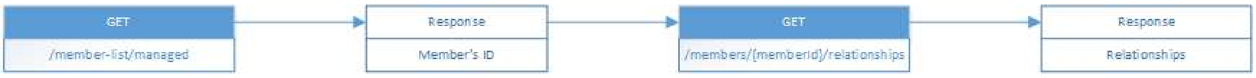
Get a member's relationships

You may need to review the member's relationships to other member's in the TruCare system. You need specific information to use the web services to retrieve the member's relationships.

To get the member's relationships, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a member's relationships.



1. Retrieve the member ID to retrieve their relationship information.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/relationships web service to retrieve the member's relationship information.

Get a member's privacy information

You may need to review the privacy information with the member. You need specific information to use the web services to retrieve the member's privacy information.

To retrieve a member's privacy information, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a member's privacy information.

1. Retrieve the member ID to retrieve their privacy information.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/privacy-information web service to retrieve the member's privacy information.

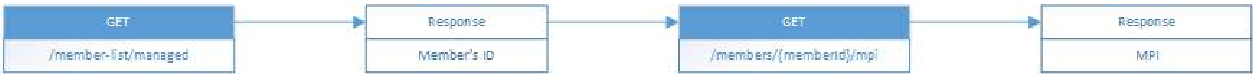
Get the member's MPI

You may need to determine if the member has another record in TruCare. You need specific information to use web services to retrieve the member's MPI (Master Person Index).

To retrieve the member's MPI, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a member's MPI.



1. Retrieve the member ID to retrieve their MPI.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/mpi web service to retrieve the member's MPI.

Get a member's contact information

You may need to directly contact a member. You need specific information to use web services to retrieve a summary of a member's addresses, phone numbers, and email addresses.

To retrieve a member's contact information, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a summary of the member's contact information.

1. Retrieve the member ID to retrieve their contact information.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/contact-information web service to retrieve the member's contact information.

Get a member's general information

You may need to review the member's general information (including ethnicity, race, religion, and language) with the member. You need specific information to use the web services to retrieve the member's general information.

To retrieve a member's general information, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a member's general information.

1. Retrieve the member ID to retrieve their general information.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/general-information web service to retrieve the member's general information.

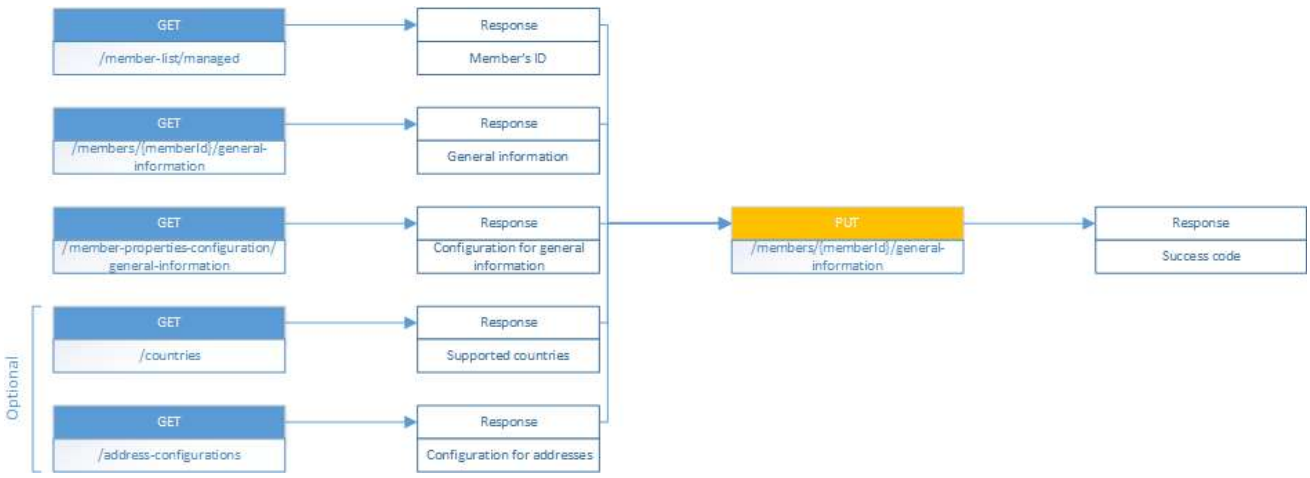
Update a member's general information

After reviewing the general information (for example, race and language) with the member, you may need to update the member's general information. You need specific information to use the web services to update the member's general information.

To update a member's general information, you need the following information:

- Member ID
- Existing general information
- Configuration to update the member's general information
- Information on the supported countries (optional)
- Configuration for addresses (optional)

The following graphic shows how to use web services to update a member's general information.



1. Retrieve the member ID to retrieve and update their general information.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/general-information web service to retrieve the member's general information.

4. Use the GET /member-properties-configuration/general-information web service to retrieve the configuration to update the member's general information.
5. (Optional) If adding or updating an international address, use the GET /countries web service to retrieve information on the supported countries.
6. (Optional) If adding or updating an address, use the GET /address-configurations web service and the country information, if applicable, to retrieve the configuration for addresses.
7. Use the member ID, the updated general information, and the PUT /members/{memberId}/general- information web service to update the member's general information.

Get a member's contact times

You may need to contact a member by phone to complete a task. You need specific information to use the web services to retrieve the member's contact times.

To retrieve a member's contact times, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a member's contact times.

1. Retrieve the member ID to retrieve their contact times.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/contact-times web service to retrieve the member's contact times.

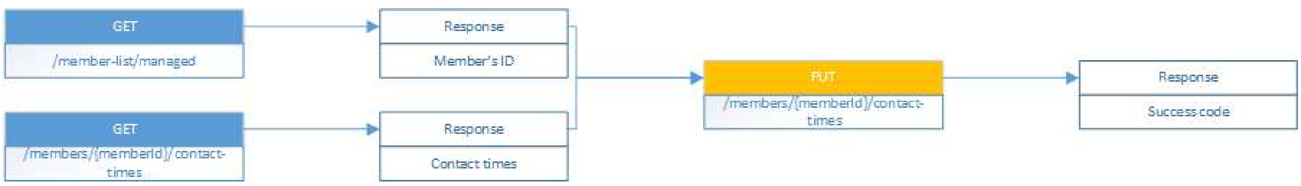
Update a member's contact times

After reviewing the contact times with the member, you may need to update the member's contact times. You need specific information to use the web services to update the member's contact times.

To update a member's contact times, you need the following information:

- Member ID
- Current contact times

The following graphic shows how to use web services to update a member's contact times.



1. Retrieve the member ID to retrieve and update their contact times.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/contact-times web service to retrieve the member's current contact times.
4. Use the member ID, the updated contact times, and the PUT /members/{memberId}/contact- times web service to update the member's contact times.

Organization contacts

You can use web services to interact with a member's organization contacts.

The following describes how to use web services to interact with a member's organization contact. For example, you can create an organization contact, edit an organization contact, add an address, and edit an address.

Topics in this section

After reviewing the organization contact with the member, you may need to update the contact's information. You need specific information to use the web services to update the phone number for a member's organization contact.

Get a summary of the organization contacts

You may need to review the organization contacts with the member. You need specific information to use the web services to retrieve a summary of the member's organization contacts.

To get a summary of the member's organization contacts, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a summary of the member's organization contacts.

1. Retrieve the member ID to retrieve the contacts' summary.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/organization-contacts web service to retrieve a summary of the member's organization contacts.

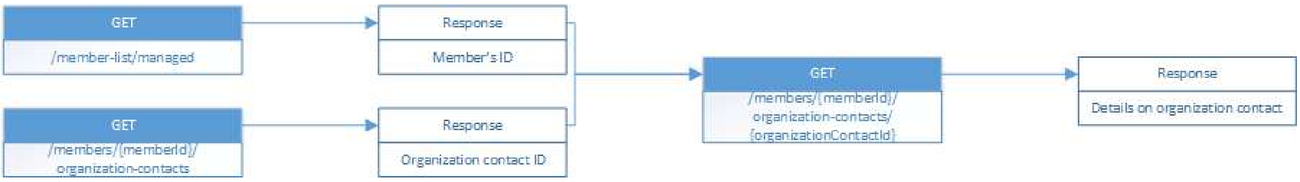
Get the details on an organization contact

You can review the details on an organization contact with member after retrieving the details using web services. You need specific information to use the web services to retrieve the details on the member's organization contact.

To get the details on a member's organization contact, you need the following information:

- Member ID
- Organization contact ID

The following graphic shows how to use web services to retrieve the details on a member's organization contact.



1. Retrieve the member ID to retrieve the summary and the details of the organization contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/organization-contacts web service to retrieve a summary of the member's organization contacts.
4. Store the ID of the contact.
5. Use the member ID, the organization contact ID, and the GET /members/{memberId}/organization-contacts/{organizationContactId} web service to retrieve the details on the member's organization contact.

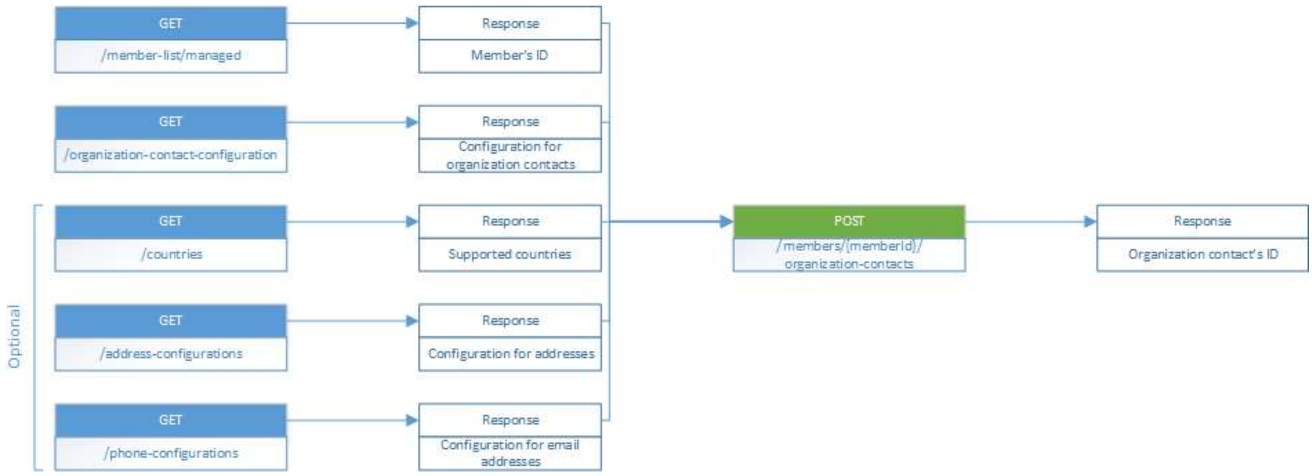
Create an organization contact

After reviewing the organization contacts with the member, you may need to create an organization contact. You need specific information to use the web services to create an organization contact for the member.

To create an organization contact, you need the following information:

- Member ID
- Configuration to create an organization contact
  - Includes the configuration to create an email address (optional)
- Information on the supported countries (optional)
- Configuration to create an address (optional)
- Configuration to create a phone number (optional)

The following graphic shows how to use web services to create an organization contact for a member.



1. Retrieve the member ID to create an associated organization contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the GET /organization-contact-configuration web service to get the configuration to create an organization contact.
4. (Optional) If including international addresses or international phone numbers, use the GET /countries

   web service to retrieve information on the supported countries.
5. (Optional) If including addresses, use the GET /address-configurations web service and the country information, if applicable, to retrieve the configuration to create an address.
6. (Optional) If including phone numbers, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration to create a phone number.
7. Use the member ID, the contact's information, and the POST /members/{memberId}/organization-contacts web service to create an organization contact for the member.

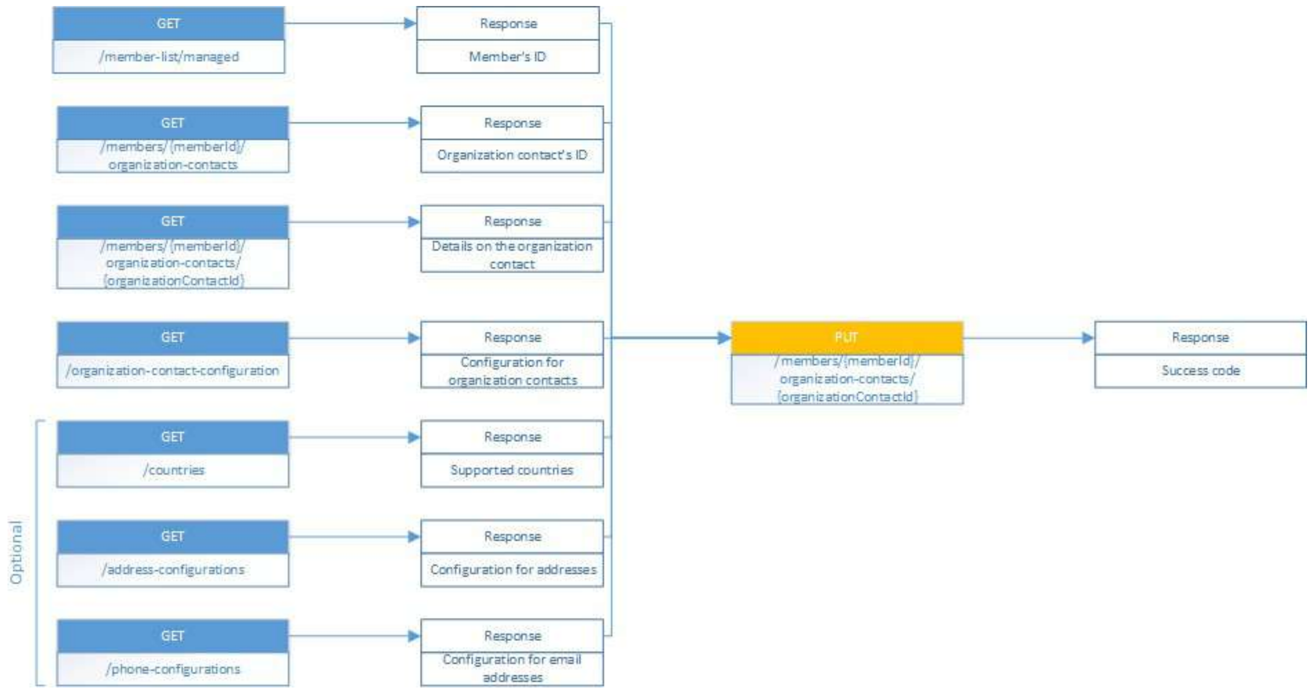
Update an organization contact

After reviewing the organization contact with the member, you may need to update the contact. You need specific information to use the web services to update the member's organization contact.

To update an organization contact, you need the following information:

- Member ID
- Organization contact ID
- Details on the organization contact
- Configuration to update an organization contact
  - Includes configuration to add or update an email address (optional)
- Information on the supported countries (optional)
- Configuration to add or update an address (optional)
- Configuration to add or update a phone number (optional)

The following graphic shows how to use web services to update a member's organization contact.



1. Retrieve the member ID to retrieve and update the organization contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/organization-contacts web service to retrieve a summary of the member's organization contacts.
4. Store the ID of the organization contact.
5. Use the member ID, the organization contact ID, and the GET /members/{memberId}/organization-contacts/{organizationContactId} web service to retrieve the details on the organization contact.
6. Use the GET /organization-contact-configuration web service to get the configuration to update an organization contact.
7. (Optional) If adding or updating international addresses or phone numbers, use the GET /countries

   web service to retrieve information on the supported countries.
8. (Optional) If adding or updating addresses, use the GET /address-configurations web service and the country information, if applicable, to retrieve the configuration to add or update an address.
9. (Optional) If adding or updating phone numbers, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration to add or update a phone number.

10. Use the member ID, the organization contact ID, the updated contact information, and the PUT / members/{memberId}/organization-contacts/{organizationContactId} web service to update the member's organization contact.

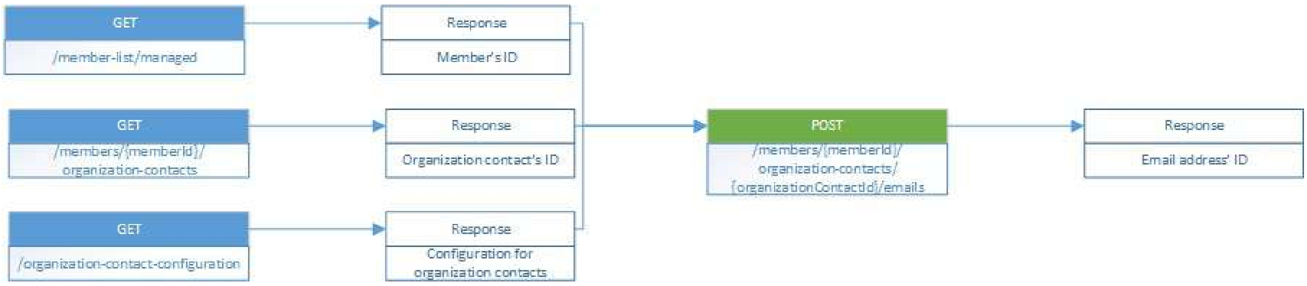
Create an email address for an organization contact

After reviewing the organization contact with the member, you can update the organization contact using web services. You need specific information to use the web services to update the email address for the member's organization contact.

To create an email address, you need the following information:

- Member ID
- Organization contact ID
- Configuration to update an organization contact (includes the configuration to create an email address)

The following graphic shows how to use web services to create an email address for a member's organization contact.



1. Retrieve the member ID to retrieve and update the organization contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/organization-contacts web service to get a summary of the member's organization contacts.
4. Store the ID of the organization contact.
5. Use the GET /organization-contact-configuration web service to get the configuration to create an email address for the organization contact.
6. Use the member ID, the organization contact ID, the information for the email address, and the POST / members/{memberId}/organization-contacts/{organizationContactId}/emails web service to create an email address for the member's organization contact.

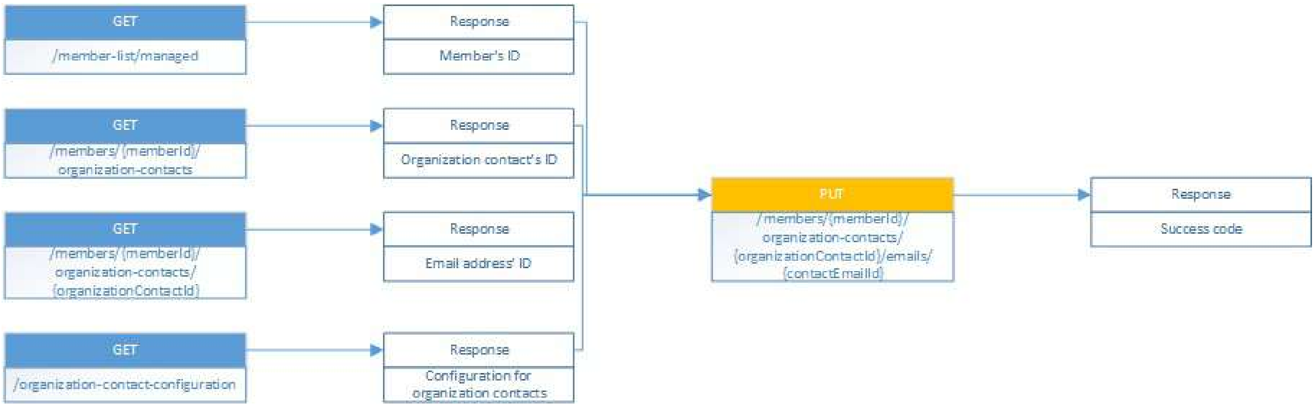
Update an email address for an organization contact

After reviewing the organization contact with the member, you can update the organization contact using web services. you need specific information to use the web services to update the email address for the member's organization contact.

To update an email address, you need the following information:

- Member ID
- Organization contact ID
- Details on the organization contact
- Configuration to update an email address

The following graphic shows how to use web services to update an email address for a member's organization contact.



1. Retrieve the member ID to retrieve and update the organization contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/organization-contacts web service to retrieve a summary of the member's organization contacts.
4. Store the ID of the organization contact.
5. Use the member ID, the organization contact ID, and the GET /members/{memberId}/organization-contacts/{organizationContactId} web service to retrieve the details on the organization contact, including the IDs of the contact's email addresses.
6. Store the ID of the email address.
7. Use the GET /organization-contact-configuration web service to get the configuration to update an email address.
8. Use the member ID, the organization contact ID, the email address' ID, the updated information, and the

PUT /members/{memberId}/organization-contacts/{organizationContactId}/emails/

{contactEmailId} web service to update the email address of the member's organization contact.

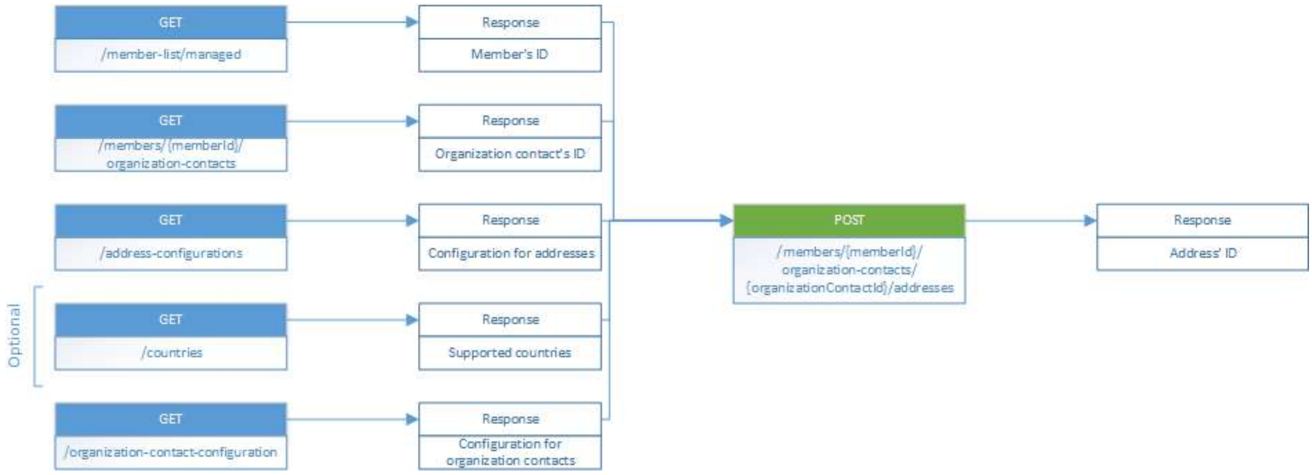
Create an address for an organization contact

After reviewing an organization contact with the member, you can update the organization contact. You need specific information to use the web services to create an address for the member's organization contact.

To create an address, you need the following information:

- Member ID
- Organization contact ID
- Configuration to update an organization contact
- Information on supported countries (optional)
- Configuration to create an address

The following graphic shows how to use web services to create an address for a member's organization contact.



1. Retrieve the member ID to retrieve and update the organization contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/organization-contacts web service to retrieve a summary of the member's organization contacts.
4. Store the ID of the organization contact.
5. Use the GET /organization-contact-configuration web service to retrieve the configuration to update an organization contact.
6. (Optional) If adding an international address, use the GET /countries web service to get the information on the supported countries.
7. Use the GET /address-configurations web service and the country information, if applicable, to get the configuration to create an address.
8. Use the member ID, the organization contact ID, the address information, and the POST / members/

{memberId}/organization-contacts/{organizationContactId}/addresses web service to create an address for the member's organization contact.

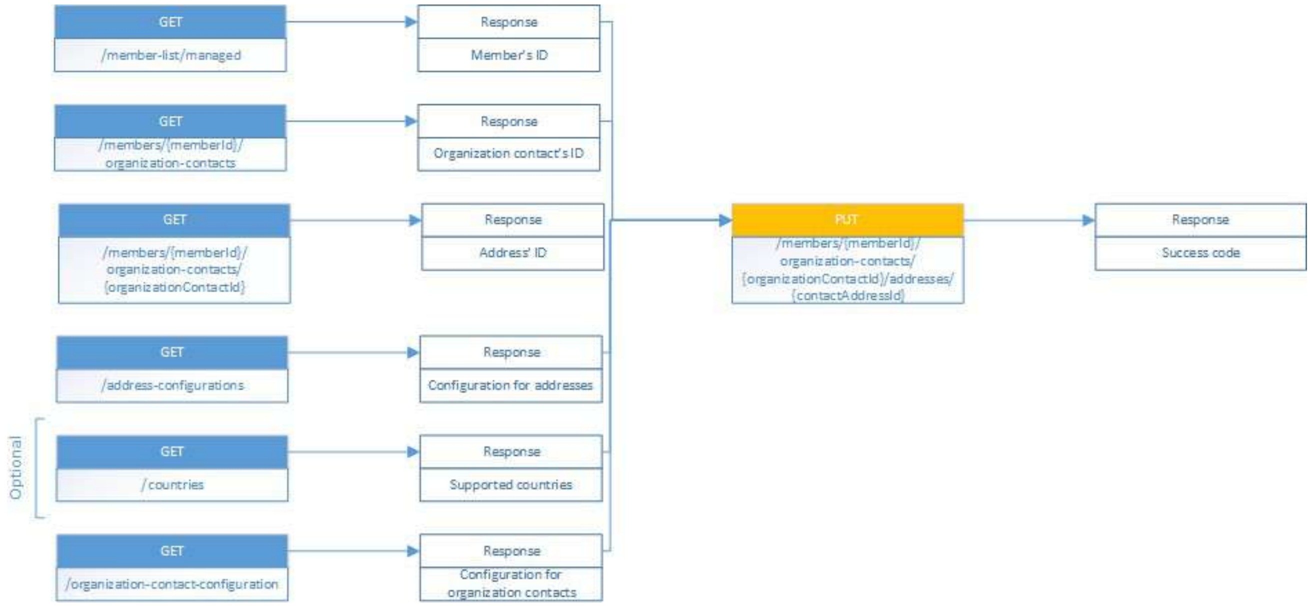
Update an address for an organization contact

After reviewing an organization contact with the member, you may need to update the contact. You need specific information to use the web services to update an address for the member's organization contact.

To update an address, you need the following information:

- Member ID
- Organization contact ID
- Address ID
- Configuration to update an organization contact
- Information on the supported countries (optional)
- Configuration to update an address

The following graphic shows how to use web services to update an address for a member's organization contact.



1. Retrieve the member ID to retrieve and update the organization contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/organization-contacts web service to retrieve a summary of the member's organization contacts.
4. Store the ID of the organization contact.
5. Use the member ID, the organization contact ID, and the GET /members/{memberId}/organization-contacts/{organizationContactId} web service to retrieve the details on the organization contact, including the IDs of the contact's addresses.
6. Store the ID of the address.
7. Use the GET /organization-contact-configuration web service to retrieve the configuration to update an organization contact.
8. (Optional) If updating an international address, use the GET /countries web service to get information on the supported countries.
9. Use the GET /address-configurations web service and the country information, if applicable, to get the configuration to update an address.
10. Use the member ID, the organization contact ID, the address ID, the updated address information, and the PUT /members/{memberId}/organization-contacts/{organizationContactId}/ addresses/{contactAddressId} web service to update the address for the member's organization contact.

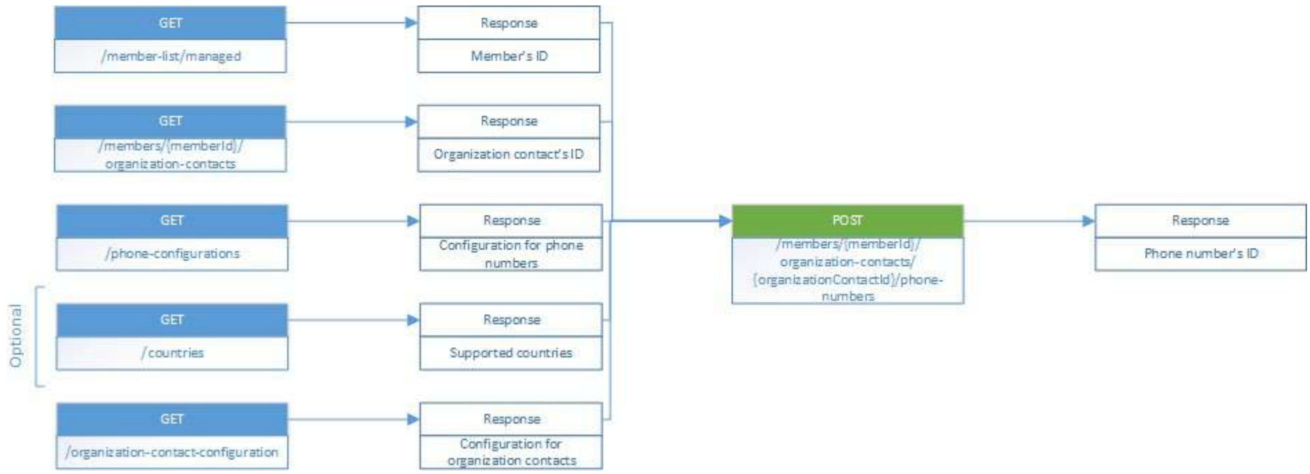
Create a phone number for an organization contact

After reviewing the organization contact with the member, you may need to update the contact. You need specific information to use the web services to create a phone number for a member's organization contact.

To create a phone number, you need the following information:

- Member ID
- Organization contact ID
- Configuration to update an organization contact
- Information on the supported countries (optional)
- Configuration to create a phone number

The following graphic shows how to use web services to create a phone number for a member's organization contact.



1. Retrieve the member ID to retrieve and update the organization contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/organization-contacts web service to retrieve the member's organization contact.
4. Store the ID of the organization contact.
5. Use the GET /organization-contact-configuration web service to get the configuration to update an organization contact.
6. (Optional) If creating an international phone number, use the GET /countries web service to retrieve information on the supported countries.
7. Use the GET /phone-configurations web service and the country information, if applicable, to get the configuration to create a phone number.
8. Use the member ID, the organization contact ID, the phone number information, and the POST / members/{memberId}/organization-contacts/{organizationContactId}/phone-numbers web service to create a phone number for the member's organization contact.

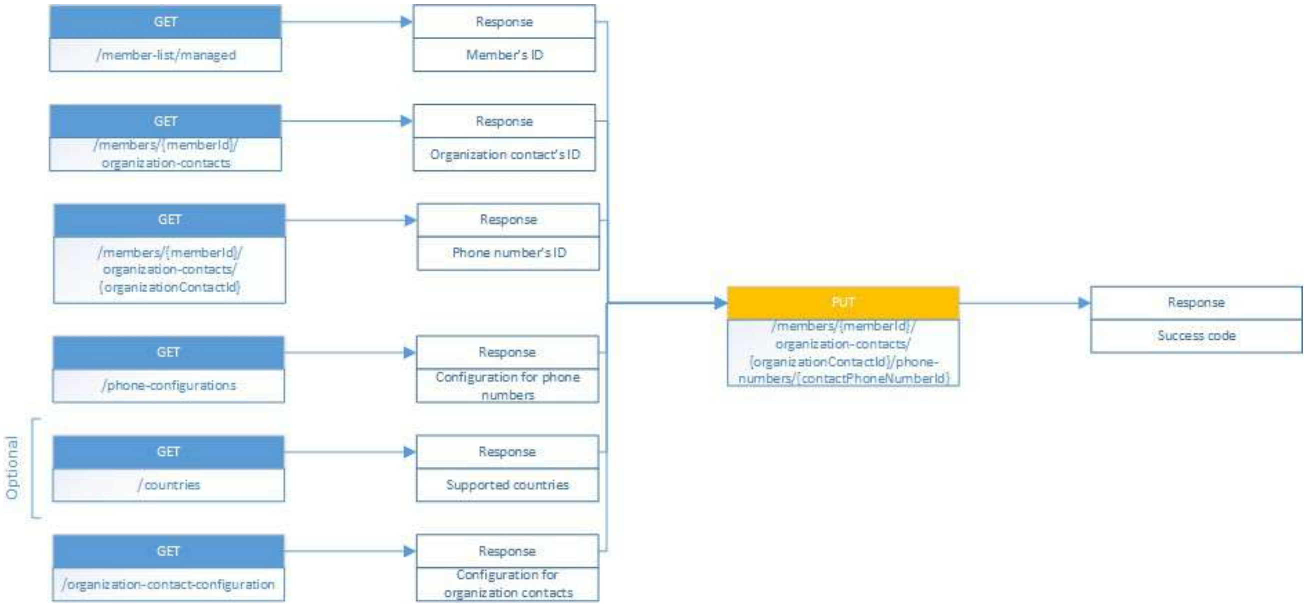
Update a phone number for an organization contact

After reviewing the organization contact with the member, you may need to update the contact's information. You need specific information to use the web services to update the phone number for a member's organization contact.

To update the phone number, you need the following information:

- Member ID
- Organization contact ID
- Details on the organization contact
- Configuration to update an organization contact
- Information on the supported countries (optional)
- Configuration to update a phone number

The following graphic shows how to use web services to update a phone number for a member's organization contact.



1. Retrieve the member ID to retrieve and update the organization contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/organization-contacts web service to get a summary of the member's organization contacts.
4. Store the ID of the organization contact.
5. Use the member ID, the organization contact ID, and the GET /members/{memberId}/ organization-contacts/{organizationContactId} web service to get the details on the organization contact including the IDs of associated phone numbers.
6. Store the ID of the phone number.
7. Use the GET /organization-contact-configuration web service to get the configuration to update an organization contact.
8. (Optional) If updating an international phone number, use the GET /countries web service to get information on the supported countries.
9. Use the GET /phone-configurations web service and the country information, if applicable, to get the configuration to update an phone number.
10. Use the member ID, the organization contact ID, the phone number ID, the updated phone information, and the PUT /members/{memberId}/organization-contacts/ {organizationContact Id}/phone-numbers/{contactPhoneNumberId} web service to update the phone number of the member's organization contact.

Personal contacts

You can use web services to interact with a member's personal contacts.

The following describes how to use web services to interact with a member's personal contacts. For example, you can use web services to create a personal contact, update a personal contact, create an address for the personal contact, and update an address for a personal contact.

Topics in this section

Get a summary of a member's personal contacts [199] on page 261

You can review a summary of a member's personal contacts to determine if you need to create or update a contact. You need specific information to use the web services to retrieve a summary of the member's personal contacts.

Get the details on a personal contact [200] on page 262

You can review the details on a personal contact with the member. You need specific information to use the web services to retrieve the details on the member's personal contact.

Create a personal contact [200] on page 262

You can create a personal contact for a member after reviewing the summary. You need specific information to use the web services to create a personal contact for the member.

Update a personal contact [201] on page 263

You can update a personal contact after reviewing it with the member. You need specific information to use the web services to update the member's personal contact.

Create an email address for a personal contact [202] on page 265

After reviewing the personal contact with the member, you can create an email address for the personal contact. You need specific information to use the web services to create an email address for the member's personal contact.

Update an email address for a personal contact [203] on page 266

After reviewing the personal contact with the member, you can update an email address for the contact. You need specific information to use the web services to update an email address for the member's personal contact.

Create an address for a personal contact [204] on page 267

After reviewing the personal contact with the member, you can create an address for the contact. You need specific information to use the web services to create an address for the member's personal contact.

Update an address for a personal contact [205] on page 268

After reviewing the personal contact with the member, you can update an address for the contact. You need specific information to use the web services to update the address for the member's personal contact.

Create a phone number for a personal contact [206] on page 269

After reviewing the personal contact with the member, you can create a phone number for the contact. you need specific information to use the web services to create a phone number for the member's personal contact.

Update a phone number for a personal contact [206] on page 270

After reviewing the personal contact with the member, you can update a phone number for the contact. You need specific information to use the web services to update a phone number for the member's personal contact.

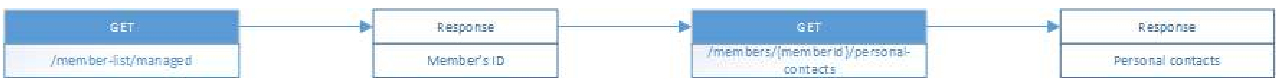
Get a summary of a member's personal contacts

You can review a summary of a member's personal contacts to determine if you need to create or update a contact. You need specific information to use the web services to retrieve a summary of the member's personal contacts.

To get a summary of a member's personal contacts, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a summary of a member's personal contacts.



1. Retrieve the member ID to be used to retrieve the summary.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.

2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/personal-contacts web service to get a summary of the member's personal contacts.

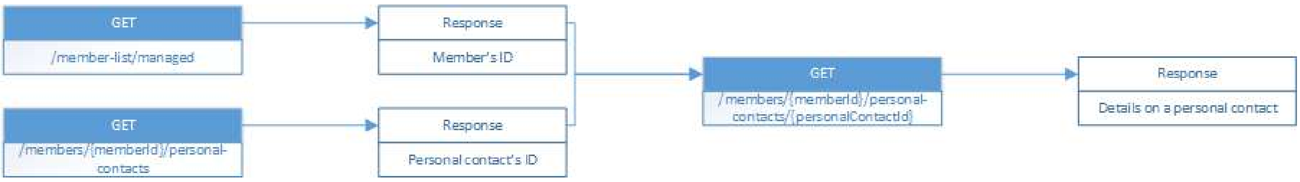
Get the details on a personal contact

You can review the details on a personal contact with the member. You need specific information to use the web services to retrieve the details on the member's personal contact.

To get the details on a personal contact, you need the following information:

- Member ID
- Personal contact ID

The following graphic shows how to use web services to retrieve the details on a member's personal contact.



1. Retrieve the member ID to retrieve the personal contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/personal-contacts web service to get a summary of the member's personal contacts.
4. Store the ID of the personal contact.
5. Use the member ID, the personal contact ID, and the GET /members/{memberId}/personal-contacts/{personalContactId} web service to get the details on the personal contact.

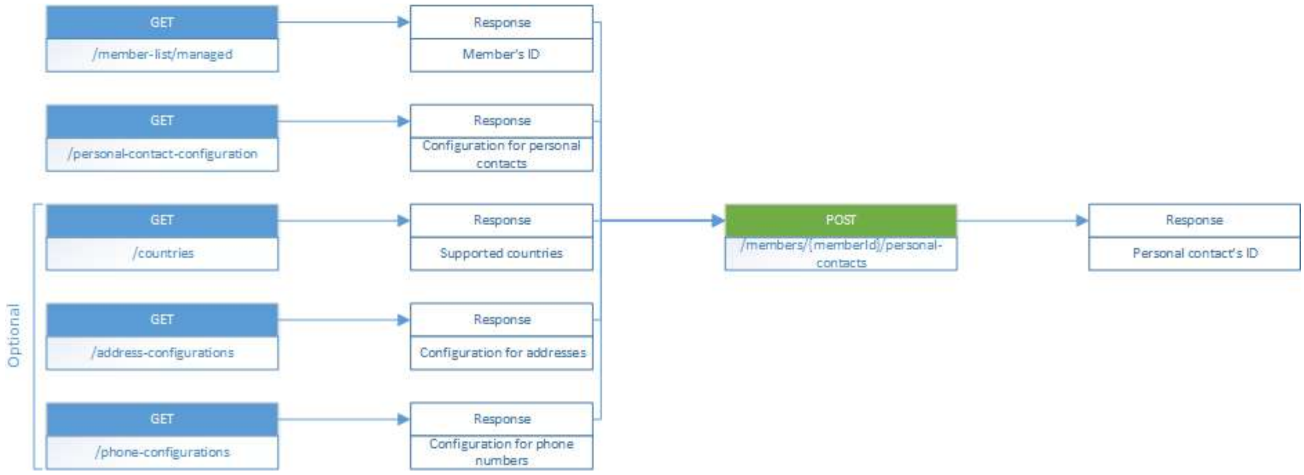
Create a personal contact

You can create a personal contact for a member after reviewing the summary. You need specific information to use the web services to create a personal contact for the member.

To create a personal contact, you need the following information:

- Member ID
- Configuration for personal contacts
  - Includes configuration for email addresses (optional)
- Countries (optional)
- Configuration for addresses (optional)
- Configuration for phone numbers (optional)

The following graphic shows how to use web services to create a personal contact for a member.



1. Retrieve the member ID to create a personal contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the GET /personal-contact-configurations web service to retrieve the configuration to create a personal contact.
4. (Optional) If including international addresses or phone numbers, use the GET /countries web service to get the information on the supported countries.
5. (Optional) If including addresses, use the GET /address-configurations web service and the country information, if applicable, to get the configuration to create an address.
6. (Optional) If including phone numbers, use the GET /phone-configurations web service and the country information, if applicable, to get the configuration to create a phone number.
7. Use the member ID, the personal contact's information, and the POST /members/{memberId}/ personal-contacts web service to create a personal contact.

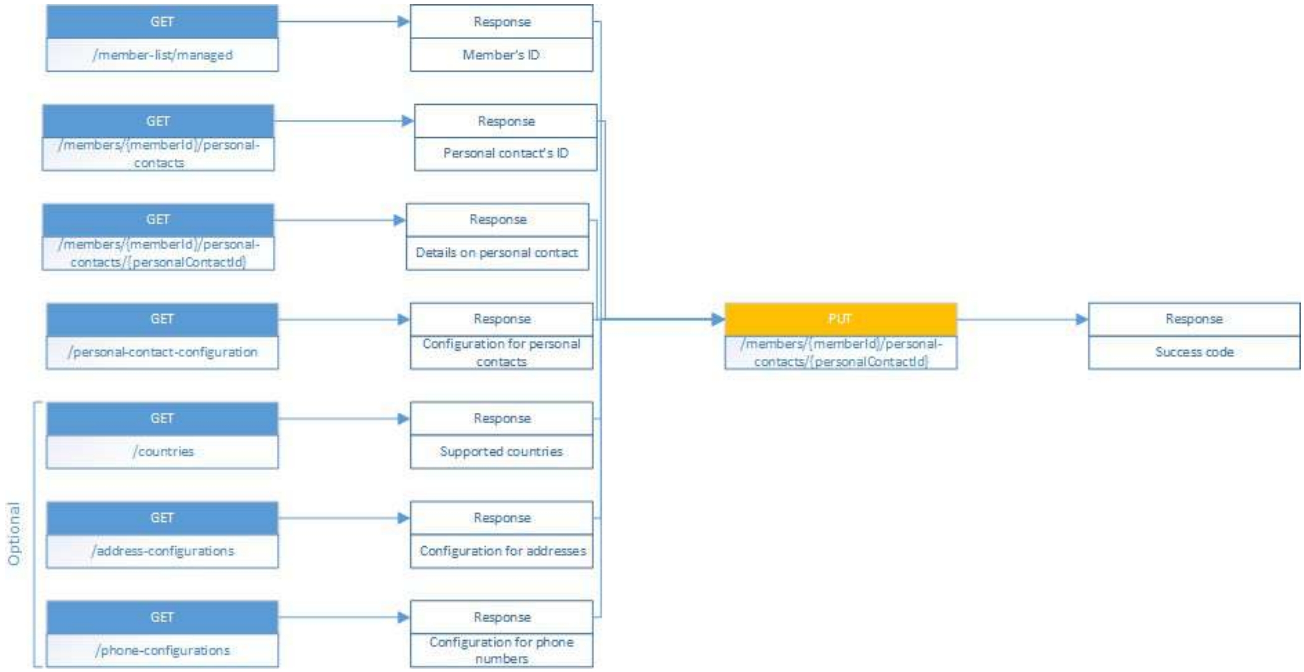
Update a personal contact

You can update a personal contact after reviewing it with the member. You need specific information to use the web services to update the member's personal contact.

To update a personal contact, you need the following information:

- Member ID
- Personal contact ID
- Details on the personal contact
- Configuration to update a personal contact
  - Including the configuration to update email addresses (optional)
- Information on the supported countries (optional)
- Configuration to update addresses (optional)
- Configuration to update phone numbers (optional)

The following graphic shows how to use web services to update a member's personal contact.



1. Retrieve the member ID to retrieve and update the personal contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/personal-contacts web service to retrieve a summary of the member's personal contacts.
4. Store the ID of the personal contact.
5. Use the member ID, the personal contact ID, and the GET /members/{memberId}/personal-contacts/{personalContactId} web service to retrieve the personal contact's details.
6. Use the GET /personal-contact-configuration web service to retrieve the configuration to update a personal contact.
7. (Optional) If updating international addresses or phone numbers, use the GET /countries web service to get the information on the supported countries.
8. (Optional) If adding or updating addresses, use the GET /address-configurations web service and the country information, if applicable, to retrieve the configuration to add or update addresses.
9. (Optional) If adding or updating phone numbers, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration to add or update phone numbers.
10. Use the member ID, the personal contact ID, the updated contact information, and the PUT /members/

{memberId}/personal-contacts/{personalContactId} web service to update the member's personal contact.

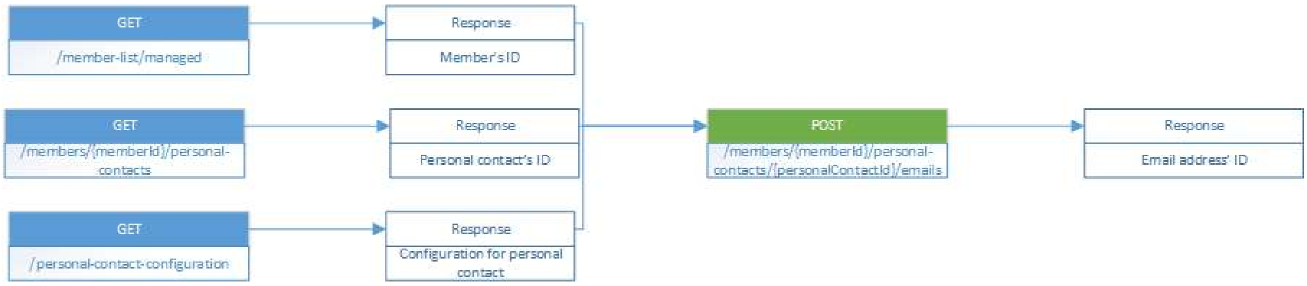
Create an email address for a personal contact

After reviewing the personal contact with the member, you can create an email address for the personal contact. You need specific information to use the web services to create an email address for the member's personal contact.

To create an email address, you need the following information:

- Member ID
- Personal contact ID
- Configuration for personal contacts

The following graphic shows how to use web services to create an email address for a personal contact.



1. Retrieve the member ID to retrieve and update the personal contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/personal-contacts web service to retrieve a summary of the member's personal contacts.
4. Store the ID of the personal contact.
5. Use the GET /personal-contact-configuration web service to retrieve the configuration to create an email address.
6. Use the member ID, the personal contact ID, the information for the email, and the POST / members/

{memberId}/personal-contacts/{personalContactId}/emails web service to create an email address for the personal contact.

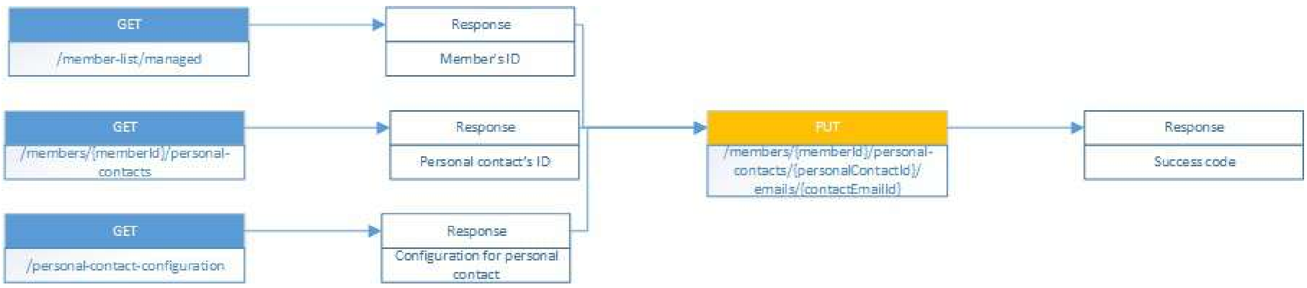
Update an email address for a personal contact

After reviewing the personal contact with the member, you can update an email address for the contact. You need specific information to use the web services to update an email address for the member's personal contact.

To update an email address, you need the following information:

- Member ID
- Personal contact ID
- Details on the personal contact
- Configuration to update an email address

The following graphic shows how to use web services to update an email address for a member's personal contact.



1. Retrieve the member ID to retrieve and update an email address.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/personal-contacts web service to get a summary of the member's personal contacts.

4. Store the ID of the personal contact.
5. Use the member ID, the personal contact ID, and the GET /members/{memberId}/personal-contacts/{personalContactId} web service to retrieve the details on the personal contact.
6. Store the ID of the email address.
7. Use the GET /personal-contact-configuration web service to retrieve the configuration to update an email address.
8. Use the member ID, the personal contact ID, the email address ID, the updated information, and the PUT /members/{memberId}/personal-contacts/{personalContactId}/emails/{contact EmailId} web service to update the personal contact's email address.

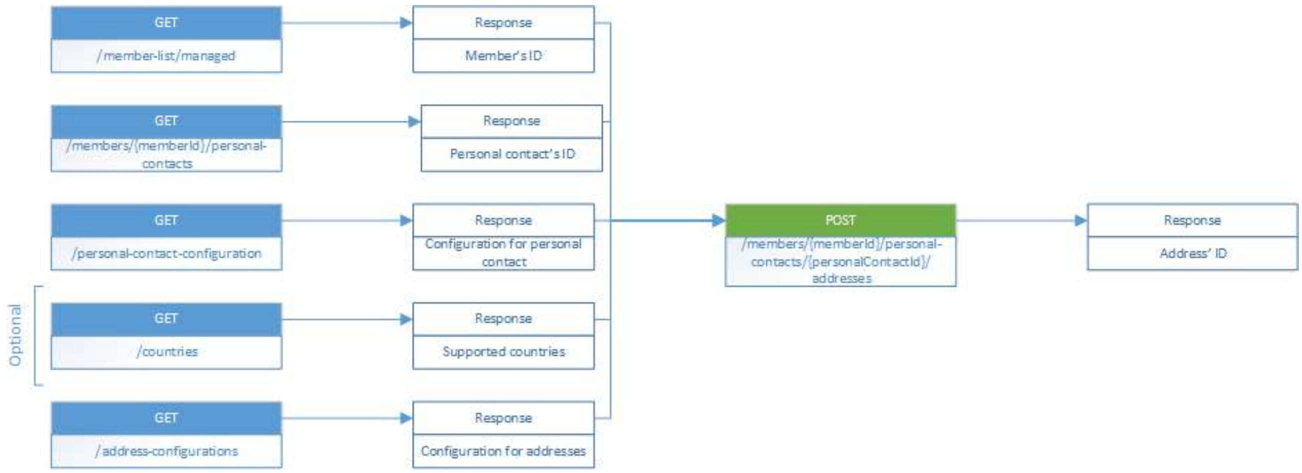
Create an address for a personal contact

After reviewing the personal contact with the member, you can create an address for the contact. You need specific information to use the web services to create an address for the member's personal contact.

To create an address, you need the following information:

- Member ID
- Personal contact ID
- Configuration to update a personal contact
- Information on supported countries (optional)
- Configuration to create an address

The following graphic shows how to use web services to create an address for a member's personal contact.



1. Retrieve the member ID to retrieve and create the address.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/personal-contacts web service to retrieve a summary of the member's personal contacts.
4. Store the ID of the personal contact.
5. Use the GET /personal-contact-configuration web service to retrieve the configuration to update a personal contact.
6. (Optional) If adding an international address, use the GET /countries web service to retrieve the information on the supported countries.
7. Use the GET /address-configurations web service and the country information, if applicable, to retrieve the configuration to create an address.
8. Use the member ID, the personal contact ID, the address information, and the POST /members/

{memberId}/personal-contacts/{personalContactId}/addresses web service to create an address for the member's personal contact.

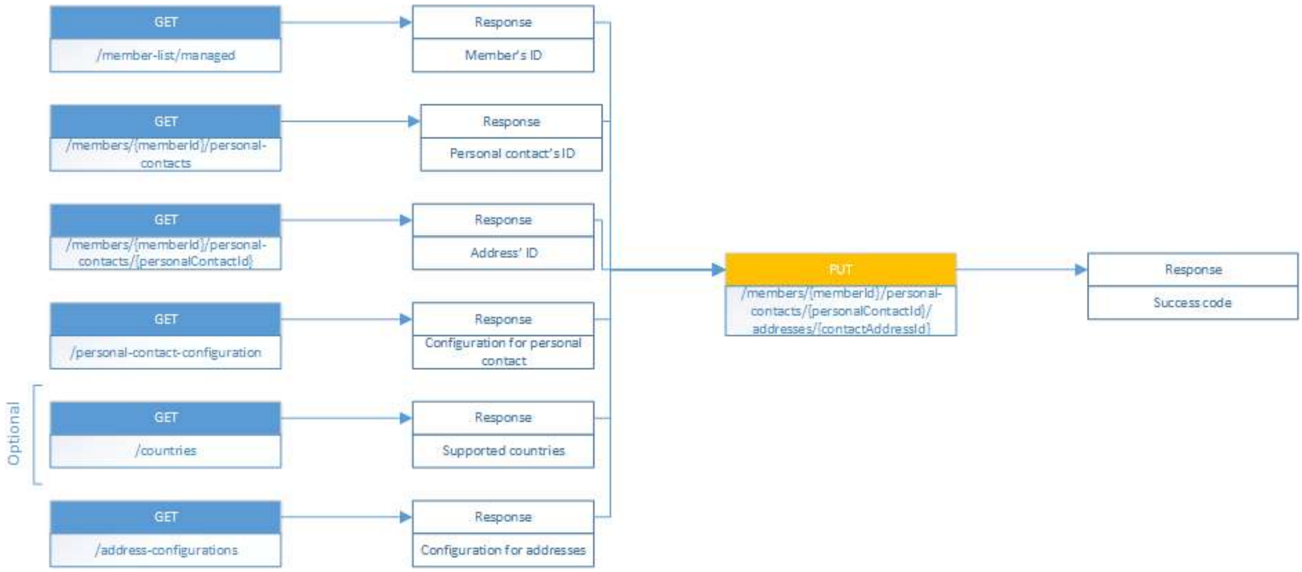
Update an address for a personal contact

After reviewing the personal contact with the member, you can update an address for the contact. You need specific information to use the web services to update the address for the member's personal contact.

To update an address, you need the following information:

- Member ID
- Personal contact ID
- Details on the personal contact
- Configuration for updating a personal contact
- Information on the supported countries (optional)
- Configuration for updating an address

The following graphic shows how to use web services to update an address for a member's personal contact.



1. Retrieve the member ID to retrieve and update the address.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/personal-contacts web service to retrieve a summary of the member's personal contacts.
4. Store the ID of the personal contact.
5. Use the member ID, the personal contact ID, and the GET /members/{memberId}/personal-contacts/{personalContactId} web service to retrieve the details on the personal contact.
6. Store the ID of the personal contact's address.
7. Use the GET /personal-contact-configuration web service to retrieve the configuration to update a personal contact.
8. (Optional) If updating an international address, use the GET /countries web service to retrieve the information on the supported countries.
9. Use the GET /address-configurations web service and the country information, if applicable, to get the configuration to update an address.
10. Use the member ID, the personal contact ID, the address ID, the updated address information, and the PUT /members/{memberId}/personal-contacts/{personalContactId}/addresses/

{contactAddressId} web service to update the address for the member's personal contact.

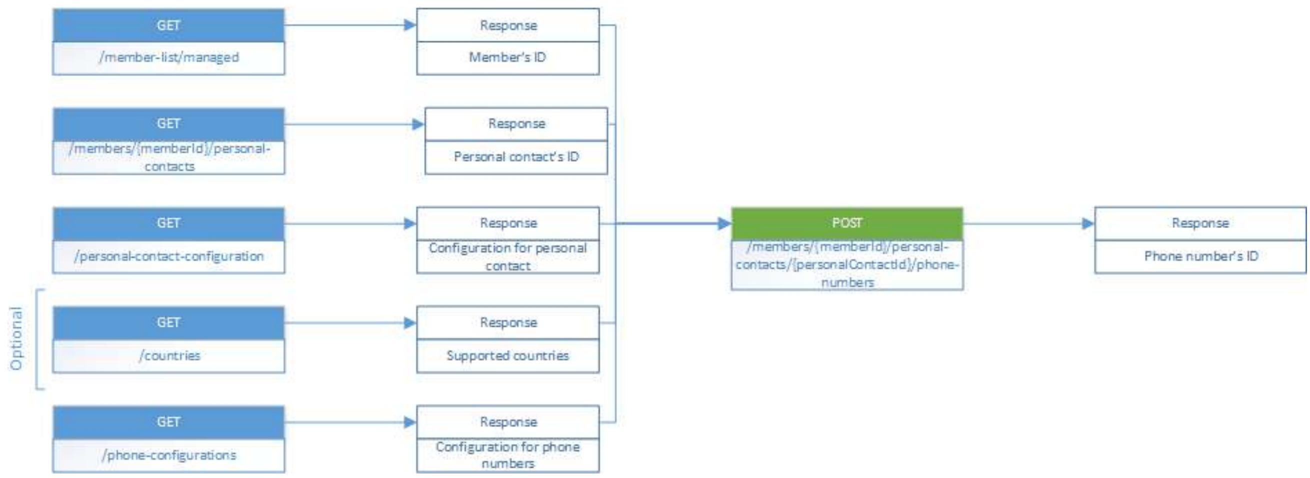
Create a phone number for a personal contact

After reviewing the personal contact with the member, you can create a phone number for the contact. you need specific information to use the web services to create a phone number for the member's personal contact.

To create a phone number, you need the following information:

- Member ID
- Personal contact ID
- Configuration for updating a personal contact
- Information on supported countries (optional)
- Configuration to create a phone number

The following graphic shows how to use web services to create a phone number for a member's personal contact.



1. Retrieve the member ID to retrieve and update a personal contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/personal-contacts web service to retrieve a summary of the member's personal contacts.
4. Store the ID of the personal contact.
5. Use the GET /personal-contact-configuration web service to retrieve the configuration to update a personal contact.
6. (Optional) If creating an international phone number, use the GET /countries web service to retrieve information on the supported countries.
7. Use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration to create a phone number.
8. Use the member ID, the personal contact ID, the phone number's information, and the POST /members/

{memberId}/personal-contacts/{personalContactId}/phone-numbers web service to create a phone number for the member's personal contact.

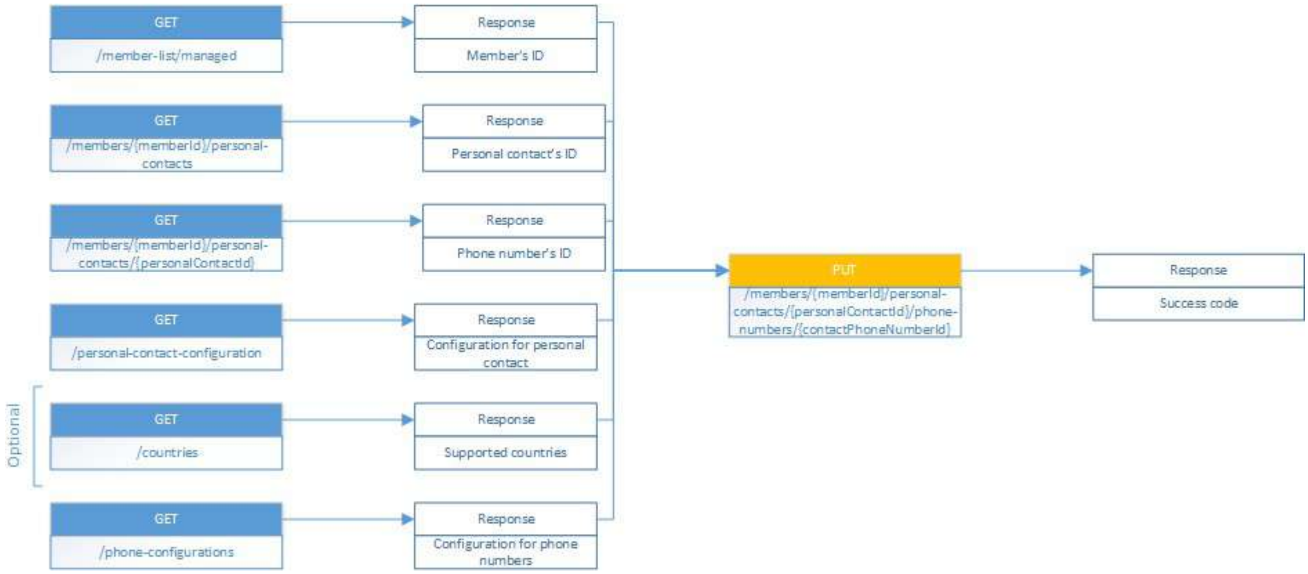
Update a phone number for a personal contact

After reviewing the personal contact with the member, you can update a phone number for the contact. You need specific information to use the web services to update a phone number for the member's personal contact.

To update the phone number, you need the following information:

- Member ID
- Personal contact ID
- Details on a personal contact
- Configuration to update a personal contact
- Information on supported countries (optional)
- Configuration to update a phone number

The following graphic shows how to use web services to update a phone number for a member's personal contact.



1. Retrieve the member ID to retrieve and update the personal contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/personal-contacts web service to retrieve a summary of the member's personal contacts.
4. Store the ID of the personal contact.
5. Use the member ID, the personal contact ID, and the GET /members/{memberId}/personal-contacts/{personalContactId} web service to retrieve the details on the personal contact.
6. Store the ID of the phone number.
7. Use the GET /personal-contact-configuration web service to retrieve the configuration to update a personal contact.
8. (Optional) If updating an international phone number, use the GET /countries web service to retrieve the information on the supported countries.
9. Use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration to update phone numbers.
10. Use the member ID, the personal contact ID, the phone number ID, the updated phone number information, and the PUT /members/{memberId}/personal-contacts/{personalContact Id}/phone-numbers/{contactPhoneNumberId} web service to update the phone number for the member's personal contact.

Phone numbers

You can use web services to interact with a member's phone numbers.

The following sections describe how to use web services to interact with the phone numbers. For example, you can use web services to retrieve, to add, and to update a member's phone numbers.

Topics in this section

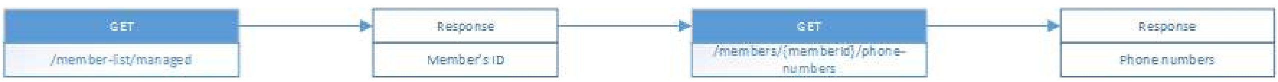
Get a summary of a member's phone numbers

You can review a summary of a member's phone numbers to determine if you need to create or update a phone number. You need specific information to use the web services to retrieve a summary of the member's phone numbers.

To retrieve a summary of the member's phone numbers, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a summary of the member's phone numbers.



1. Retrieve the member ID to retrieve the summary.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/phone-numbers web service to get a summary of the member's phone numbers.

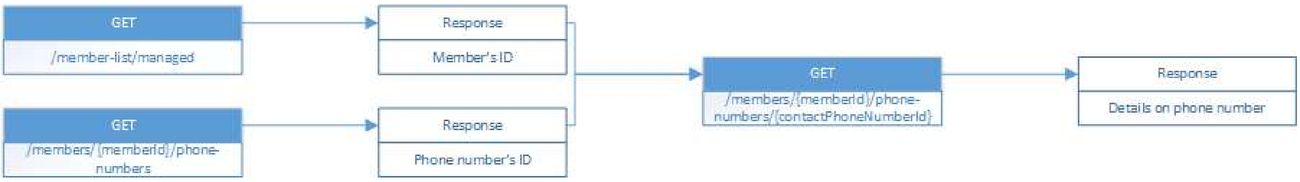
Get the details on a member's phone number

You can review the details on a phone number with the member after retrieving the details. You need specific information to use the web services to retrieve the details on a member's phone number.

To get the details on the phone number, you need the following information:

- Member ID
- Phone number ID

The following graphic shows how to use web services to retrieve the details on a member's phone number.



1. Retrieve the member ID to retrieve the phone number.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/phone-numbers web service to retrieve a summary of the member's phone numbers.
4. Store the ID of the phone number.
5. Use the member ID, the phone number ID, and the GET /members/{memberId}/phone-numbers/

{contactPhoneNumberId} web service to retrieve the details on the phone number.

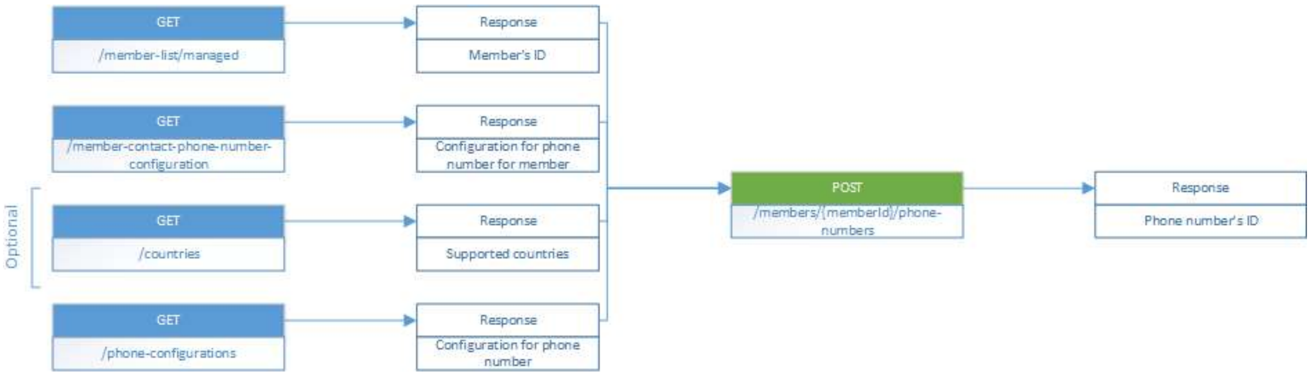
Create a phone number for a member

You can create a phone number for a member after reviewing the summary of the member's current phone numbers. You need specific information to use the web services to create a phone number for the member.

To create a phone number for a member, you need the following information:

- Member ID
- Configuration to create a phone number for the member
- Information on the supported countries (optional)
- Configuration for create a phone number

The following graphic shows how to use web services to create a phone number for a member.



1. Retrieve the member ID to create a phone number.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the GET /member-contact-phone-numbers-configuration web service to get the configuration to create a phone number for the member.
4. (Optional) If adding an international phone number, use the GET /countries web service to retrieve the information on the supported countries.
5. Use the GET /address-configurations web services and the country information, if applicable, to get the configuration to create a phone number.
6. Use the member ID, the information for the phone number, and the POST /members/{memberId}/ phone-numbers web service to create the phone number for the member.

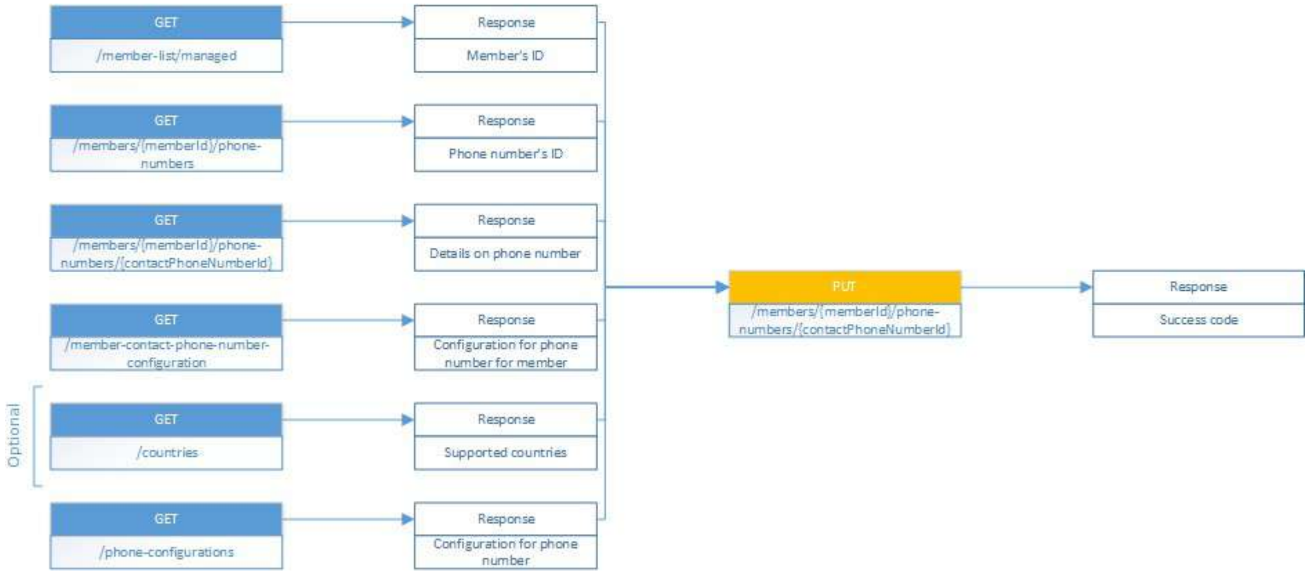
Update a phone number for a member

After reviewing the phone numbers with the member, you can update a phone number. You need specific information to use the web services to update the member's phone number.

To update the phone number, you need the following information:

- Member ID
- Phone number ID
- Details on the phone number
- Configuration for member's phone numbers
- Information for supported countries (optional)
- Configuration for phone numbers

The following graphic shows how to use web services to update a member's phone number.



1. Retrieve the member ID to retrieve and update the phone number.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/phone-numbers web service to get a summary of the member's phone numbers.
4. Store the ID of the phone number.
5. Use the member ID, the phone number ID, and the GET /members/{memberId}/phone-numbers/

   {contactPhoneNumber} web service to get the details on the phone number.
6. Use the GET /member-contact-phone-number-configuration web service to retrieve the configuration to update the member's phone number.
7. (Optional) If updating an international phone number, use the GET /countries web service to get the configuration to update a member's phone number.
8. Use the GET /phone-configurations web service and the country information, if applicable, to get the configuration for update a phone number.
9. Use the member ID, the phone number ID, the updated phone information, and the PUT /members/

{memberId}/phone-numbers/{contactPhoneNumber} web service to update the member's phone number.

Prescreen

You can use web services to prescreen an authorization before creating the authorization. The following describes how to use the prescreen web services.

Topics in this section

You can prescreen an inpatient (IP) authorization before creating the authorization. You need specific information to use the web services to prescreen an IP authorization.

You can prescreen a service/procedure (SP) authorization before creating the authorization. You need specific information to use the web services to prescreen an SP authorization.

You can prescreen an Rx authorization before creating the authorization. You need specific information to use the web services to prescreen an Rx authorization.

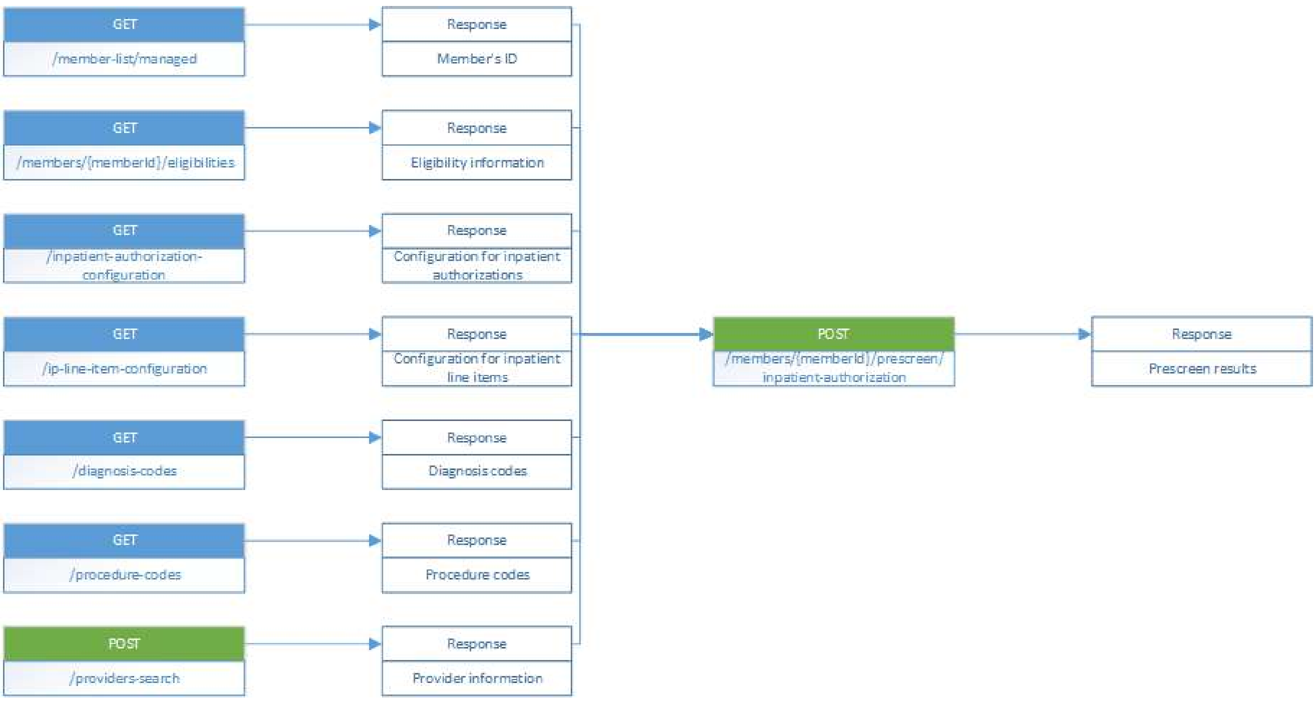
Prescreen an inpatient (IP) authorization

You can prescreen an inpatient (IP) authorization before creating the authorization. You need specific information to use the web services to prescreen an IP authorization.

To prescreen the IP authorization, you need the following information:

- Member ID
- Member's eligibility information
- Configuration to create an IP authorization
- Diagnosis codes
- Procedure codes
- Information on the provider

The following graphic shows how to use web services to prescreen an inpatient authorization.



1. Retrieve the member ID for the authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.

2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/eligibilities web service to get the member's eligibility to be used on the authorization.
4. Use the GET /inpatient-authorization-configuration web service and the GET / inpatient-authorization-configuration/bhp-configuration web service to get the configuration to create an IP authorization.
5. Use the GET /ip-line-item-configuration web service to get the configuration to create an IP line item.
6. Use the GET /diagnosis-codes web service to get the diagnosis codes you want to use on the authorization.
7. Use the GET /procedure-codes web service to get the procedure codes you want to use on the authorization.
8. Search for the provider you want to use on the authorization. Refer to Search for a provider [231] on page 301 for more information.
9. Use the member ID, the information for the IP authorization, and the POST / members/{memberId}/ prescreen/inpatient-authorization web service to prescreen the IP authorization.

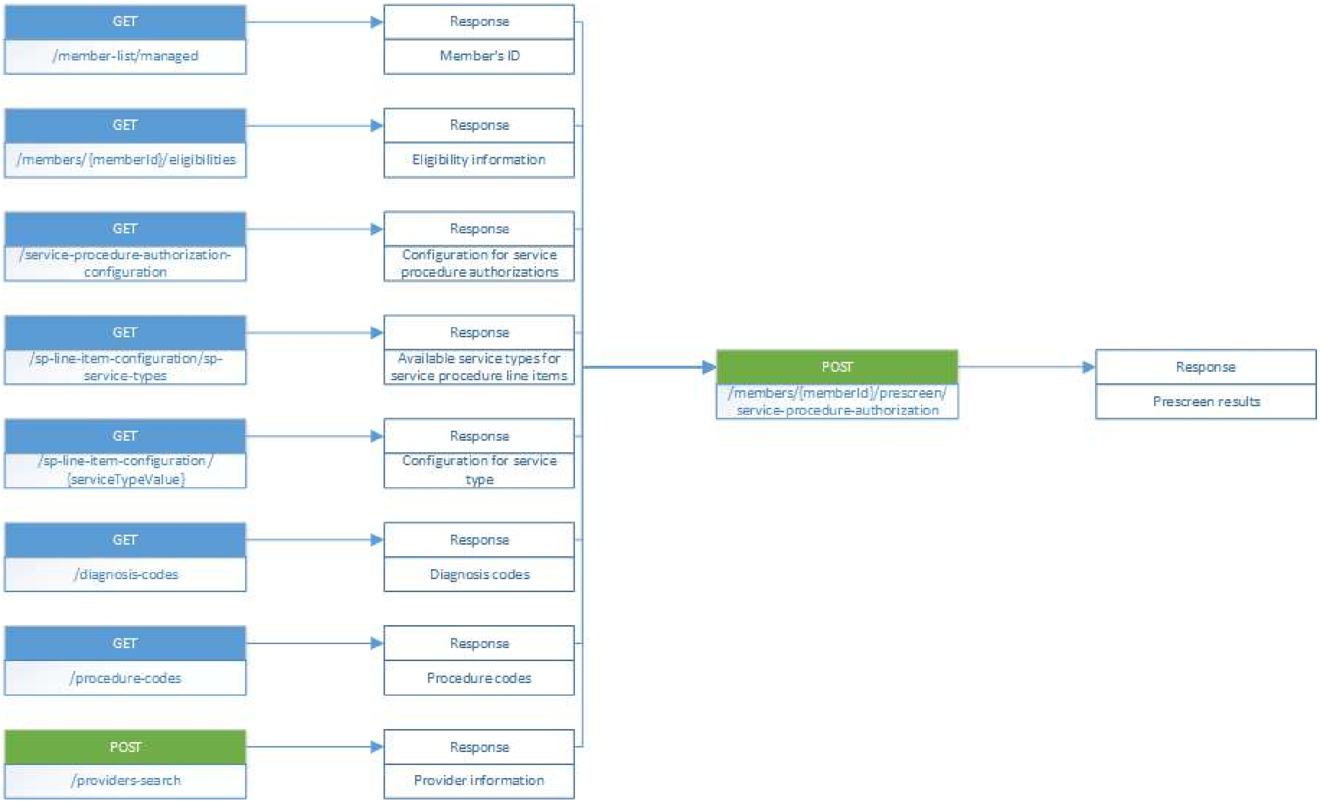
Prescreen a service/procedure (SP) authorization

You can prescreen a service/procedure (SP) authorization before creating the authorization. You need specific information to use the web services to prescreen an SP authorization.

To prescreen an SP authorization, you need the following information:

- Member ID
- Member's eligibility information
- Configuration to create an SP authorization
- Configuration to create an SP line item
- Diagnosis codes
- Procedure codes
- Provider information

The following graphic shows how to use web services to prescreen a service/procedure authorization.



1. Retrieve the member ID to prescreen the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/eligibilities web service to get the member's eligibility information to use it on the authorization.
4. Use the GET /service-procedure-authorization-configuration web service to retrieve the configuration to create an SP authorization.
5. Use the GET /sp-line-item-configuration/sp-service-types web service to retrieve the available services for the member.
6. Store the value for the service type to use it on the authorization.
7. Use the GET /sp-line-item-configuration/{serviceTypeValue} web service and the service type to get the configuration to create the line item.
8. Use the GET /diagnosis-codes web service to get the diagnosis information you want to use on the authorization.
9. Use the GET /procedure-codes web service to get the information on the procedure you want to use on the authorization.
10. Search for the provider you want to use on the authorization. Refer to Search for a provider [231] on page 301 for more information.
11. Use the member ID, the authorization's information, and the POST /members/{memberId}/prescreen/service-procedure-authorization web service to prescreen the authorization.

Prescreen an Rx authorization

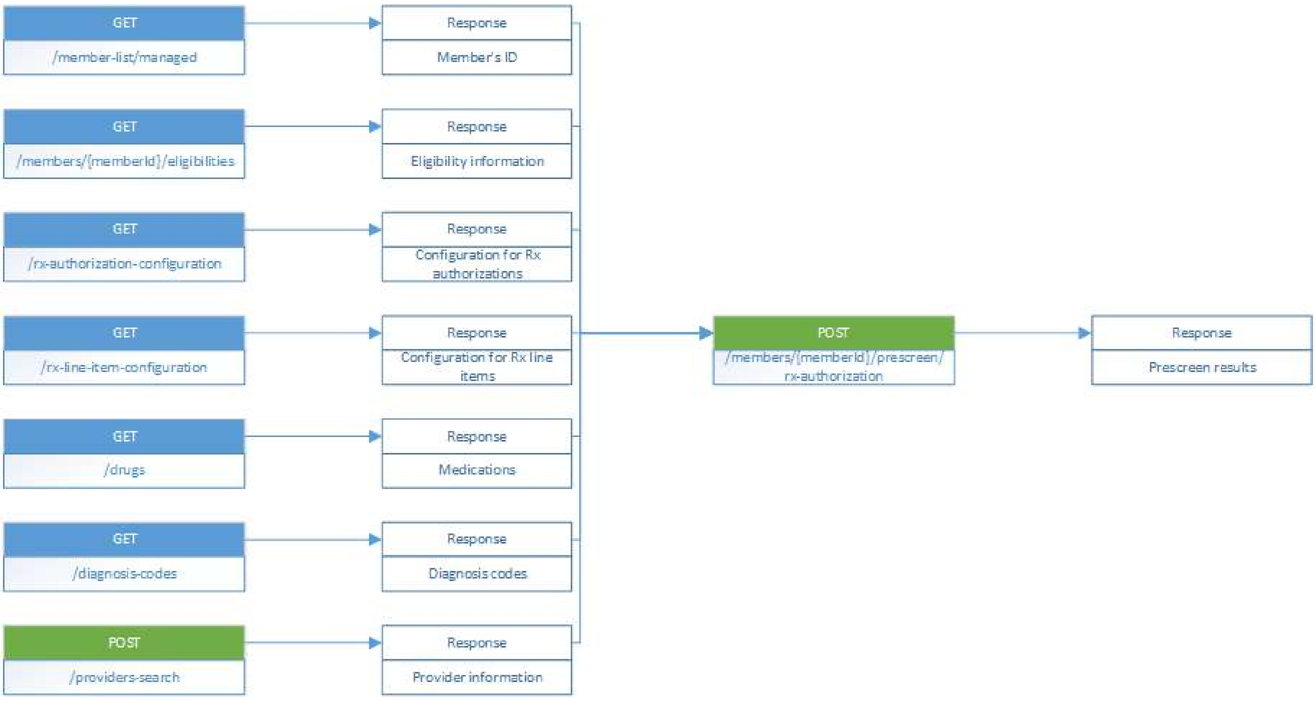
You can prescreen an Rx authorization before creating the authorization. You need specific information to use the web services to prescreen an Rx authorization.

To prescreen an Rx authorization, you need the following information:

- Member ID
- Member's eligibility information
- Configuration to create an Rx authorization

- Configuration to create an Rx line item
- Medication information
- Diagnosis information
- Provider information

The following graphic shows how to use web services to prescreen an Rx authorization.



1. Retrieve the member ID to prescreen the Rx authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/eligibilities web service to get the member's eligibility information to use on the authorization.
4. Use the GET /rx-authorization-configuration web service to get the configuration to create an Rx authorization.
5. Use the GET /rx-line-item-configuration web service to get the configuration to create an Rx authorization.
6. Use the GET /drugs web service to get the information on the medication you want to include on the authorization.
7. Use the GET /diagnosis-codes web service to get the diagnosis you want to include on the authorization.
8. Search for the provider you want to use on the authorization. Refer to Search for a provider [231] on page 301 for more information.
9. Use the member ID, the authorization's information, and the POST /members/{memberId}/prescreen/rx-authorization web service to prescreen the Rx authorization.

Product features and feature services

You can interact with a member's product features and feature services using web services.

TruCare Products have been enhanced with the ability to add product features and feature services which provide more in depth information on what constitutes a specific product. This optional feature includes the ability for you to view the product features and feature services a member has and to have these product features and feature services be used during various TruCare workflows.

Topics in this section

Search for product features and feature services

You can search for a member's product features and feature services to review the information with the member. You need specific information to use the web services to search for a member's product features and feature services.

To search for a member's product features and feature services, you need the following information:

- Member ID

The following graphic shows how to use web services to search for a member's product features and feature services.

1. Retrieve the member ID to use in the search.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID, the search criteria, and GET /members/{memberId}/product-feature-search web service to search the member's product features and feature services.

Search for product features

You can search for a member's product features using web services. You need specific information to use the web services to search for the member's product features.

To search for a member's product features, you need the following information:

- Member ID

The following graphic shows how to use web services to search for a member's product features.

1. Retrieve the member ID to use in the search.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID, the search criteria, and the POST /members/{memberId}/product-features- search/lite-v2 web service to search the member's product features.

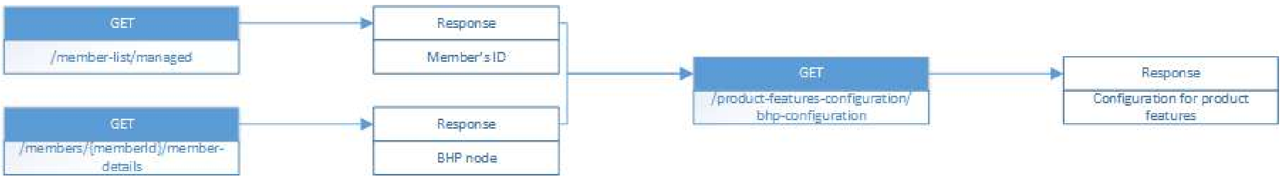
Get the BHP configuration for product features

You can get a member's BHP configuration for product features using web services. You need specific information to use the web services to retrieve the BHP configuration for product features.

To get the BHP configuration, you need the following information:

- Member ID
- BHP node

The following graphic shows how to use web services to retrieve the BHP configuration for product features.



1. Retrieve the member ID to retrieve the BHP node and the configuration.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/member-details web service to retrieve the member's BHP node.
4. Store the member's BHP node.
5. Use the member's BHP node and the GET /product-features-configuration/bhp-configuration web service to retrieve the configuration for product features for the member's BHP node.

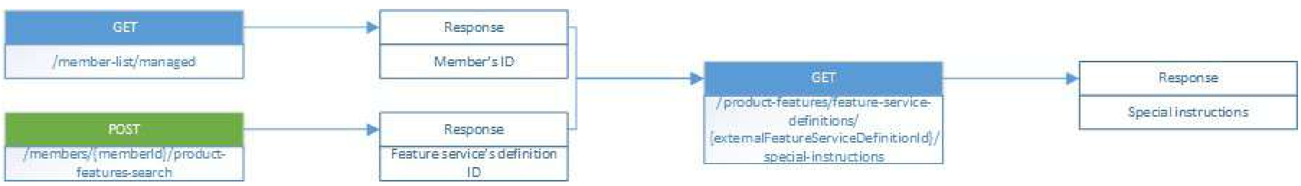
Get the special instructions on a product feature

You can review the special instructions on a feature service with the member. You need specific information to use the web services to retrieve the special instructions on a member's feature service.

To get the special instructions, you need the following information:

- Member ID
- Feature service ID

The following graphic shows how to use web services to retrieve the special instructions on a member's feature service.



1. Retrieve the member ID to search for the product feature.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID, any search criteria, and the POST /members/{memberId}/product-features- search web service to search for the product feature.
4. Store the product feature's external ID.
5. Use the product feature ID and the GET /product-features/product-feature-definitions/

{externalProductFeatureDefinitionId}/special-instructions web service to retrieve the special instructions on the product feature.

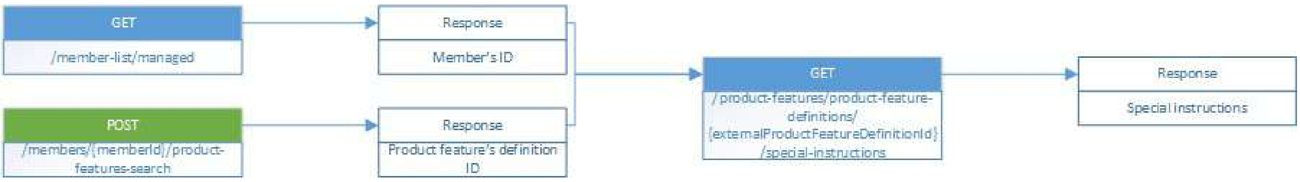
Get the special instructions on a feature service

You may need to review the special information on a product features with the member. You need specific information to use the web services to retrieve the special instructions on a member's product feature.

To get the special instructions, you need the following information:

- Member ID
- Product feature ID

The following graphic shows how to use web services to retrieve special instructions on a member's product feature.



1. Retrieve a member ID to use to search for feature service.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID, any search criteria, and the POST /members/{memberId}/product-features- search web service to search for the feature service you want to view.
4. Store the feature service's external ID.
5. Use the feature service ID and the GET /product-features/feature-search-definitions/

{externalFeatureServiceDefinitionId} web service to retrieve the special instructions on a feature service.

Program enrollments

You can interact with a member's program enrollments using web services.

The following describes how to use web services to interact with a member's program enrollments. For example, you can use web services to enroll a member in a program, to close a program enrollment, and to reinstate a member in a program.

Topics in this section

You can retrieve a summary of a member's program enrollments. You need specific information to use the web services to retrieve a summary of the member's program enrollments.

You can retrieve a summary of a member's current program enrollments. You need specific information to use the web services to retrieve a summary of the member's current program enrollments.

Create a program enrollment [219] on page 286

After reviewing the summary of the member's current program enrollments, you can create a program enrollment. You need specific information to use the web services to create a program enrollment for the member.

Close a program enrollment [219] on page 287

After reviewing the program enrollments with the member, you can close a program enrollment. You need specific information to use the web services to close a member's program enrollment.

Re-enroll a member in a program [220] on page 287

After reviewing the program enrollments with a member, you can re-enroll a member in a program. You need specific information to use the web services to re-enroll the member in a program.

Reinstate a member in a program [220] on page 288

After reviewing the program enrollments with a member, you can reinstate a member in the program using web services. You need specific information to use the web services to reinstate the member in a program.

Get a summary of the member's program enrollments

You can retrieve a summary of a member's program enrollments. You need specific information to use the web services to retrieve a summary of the member's program enrollments.

To get the summary, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a summary of the member's program enrollments.

1. Retrieve the member ID to use to retrieve the program enrollments.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/program-enrollments web service to get a summary of the member's program enrollments.

Get a summary of the member's current program enrollments

You can retrieve a summary of a member's current program enrollments. You need specific information to use the web services to retrieve a summary of the member's current program enrollments.

To get a summary of the member's current program enrollments, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a summary of the member's current program enrollments.

1. Retrieve the member ID to retrieve the current program enrollments.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/program-enrollments/current to retrieve a summary of the member's current program enrollments.

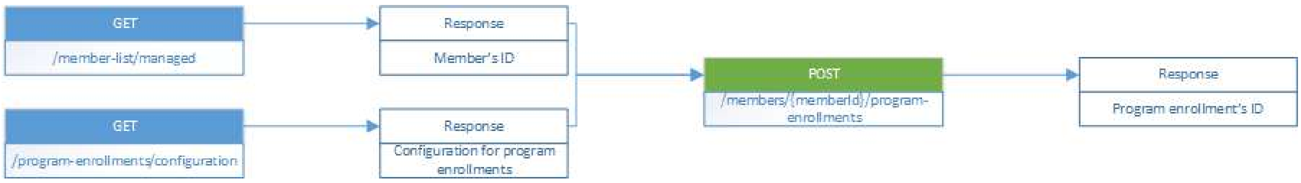
Create a program enrollment

After reviewing the summary of the member's current program enrollments, you can create a program enrollment. You need specific information to use the web services to create a program enrollment for the member.

To create a program enrollment, you need the following information:

- Member ID
- Configuration for a program enrollment

The following graphic shows how to use web services to create a program enrollment for a member.



1. Retrieve the member ID to create the program enrollment.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the GET /program-enrollments/configuration web service to get the configuration to create a program enrollment.
4. Use the member ID, the program's information, and the POST /members/{memberId}/program- enrollments web service to create a program enrollment for a member.

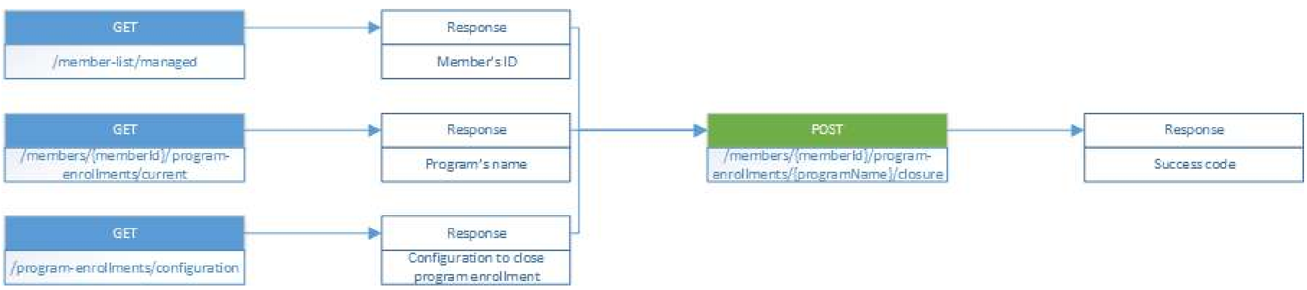
Close a program enrollment

After reviewing the program enrollments with the member, you can close a program enrollment. You need specific information to use the web services to close a member's program enrollment.

To close a program enrollment, you need the following information:

- Member ID
- Program name
- Configuration to close the program enrollment

The following graphic shows how to use web services to close a member's program enrollment.



1. Retrieve the member ID to retrieve and close the program enrollment.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/program-enrollments/current web service to retrieve a summary of the member's current program enrollments.
4. Store the program name.
5. Use the GET /program-enrollments/configuration web service to retrieve the configuration to close the program enrollment.
6. Use the member ID, the program name, the closure information, and the POST / members/{member Id}/program-enrollments/{programName}/closure web service to close the program.

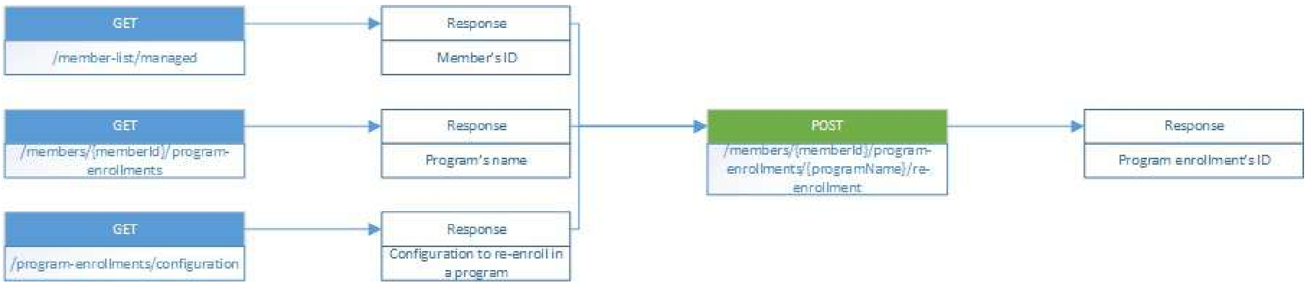
Re-enroll a member in a program

After reviewing the program enrollments with a member, you can re-enroll a member in a program. You need specific information to use the web services to re-enroll the member in a program.

To re-enroll a member in a program, you need the following information:

- Member ID
- Program name
- Configuration to re-enroll a member in a program

The following graphic shows how to use web services to re-enroll a member in a program.



1. Retrieve a member ID to use to retrieve and re-enroll the member in a program.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/program-enrollments web service to retrieve the member's program enrollments.
4. Store the program name.
5. Use the GET /program-enrollments/configuration web service to retrieve the configuration to re-enroll the member in a program.
6. Use the member ID, the program name, the re-enrollment information, and the POST / members/

{memberId}/program-enrollments/{programName}/re-enrollment web service to re-enroll the member in a program.

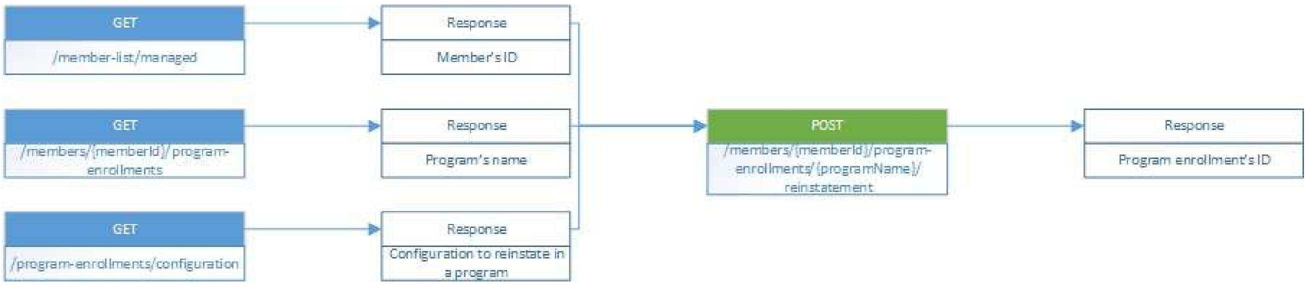
Reinstate a member in a program

After reviewing the program enrollments with a member, you can reinstate a member in the program using web services. You need specific information to use the web services to reinstate the member in a program.

To reinstate a member in a program, you need the following information:

- Member ID
- Program name
- Configuration to reinstate the member

The following graphic shows how to use web services to reinstate a member in a program.



1. Retrieve the member ID to retrieve and reinstate the member.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/program-enrollments web service to retrieve a summary of the member's programs.
4. Store the program name.
5. Use the GET /program-enrollments/configuration web service to get the configuration to reinstate the member in a program.
6. Use the member ID, the program name, the reinstatement information, and the POST /members/

{memberId}/program-enrollments/{programName}/reinstatement web service to reinstate the member in the program.

Provider contacts

You can use web services to interact with a member's provider contacts.

The following describes how to use web services to interact with a member's provider contacts. For example, you can use web services to create a provider contact, to update a provider contact, to create an address, and to update the address.

Topics in this section

Get a summary of provider contacts [222] on page 290

You can retrieve a summary of the member's provider contacts to determine if you need to create or update a contact. You need specific information to use the web services to retrieve a summary of the member's provider contacts.

Get the details on a provider contact [222] on page 291

You may need to review the details on a member's provider contact. You need specific information to use the web services to retrieve the details on the member's provider contact.

Create a provider contact [223] on page 291

You can create a provider contact for a member. You need specific information to use the web services to create a provider contact.

Update a provider contact [224] on page 293

You can use web services to retrieve and update a member's provider contact. You need specific information to use the web services to update the member's provider contact.

Create an email address for a provider contact [225] on page 294

After reviewing the provider contact with the member, you may need to create an email address for the provider contact. You need specific information to use the web services to create an email address for the member's provider contact.

Update an email address for a provider contact [226] on page 295

After reviewing the provider contact with the member, you may need to update the provider contact's email address. You need specific information to use the web services to update the email address for the member's provider contact.

Create an address for a provider contact [227] on page 296

After reviewing the provider contact with the member, you can create an address for the contact using web services. You need specific information to use the web services to create an address for the member's provider contact.

Update an address for a provider contact [228] on page 297

After reviewing the provider contact with the member, you can update an address for the contact using web services. You need specific information to use the web services to update an address for the member's provider contact.

Create a phone number for a provider contact [229] on page 299

After reviewing the provider contact with the member, you may need to create a phone number for the contact. You need specific information to use the web services to create a phone number for the member's provider contact.

Update a phone number for a provider contact [230] on page 300

After reviewing the provider contact with the member, you may need to update the contact's phone number. You need specific information to use web services to update the phone number for the member's provider contact.

Get a summary of provider contacts

You can retrieve a summary of the member's provider contacts to determine if you need to create or update a contact. You need specific information to use the web services to retrieve a summary of the member's provider contacts.

To get a summary of the member's provider contacts, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a summary of a member's provider contacts.

1. Retrieve the member ID to retrieve the provider contact summary.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/provider-contacts web service to get a summary of the member's provider contacts.

Get the details on a provider contact

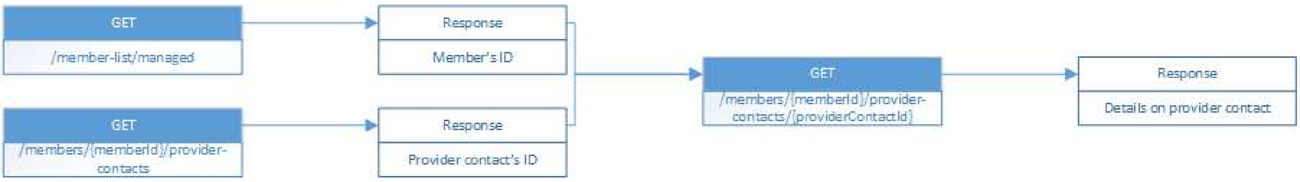
You may need to review the details on a member's provider contact. You need specific information to use the web services to retrieve the details on the member's provider contact.

To retrieve the details on a member's provider contact, you need the following information:

- Member ID

- Provider contact ID

The following graphic shows how to use web services to retrieve the details on a member's provider contact.



1. Retrieve the member ID to retrieve the details on the member's provider contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/provider-contacts web service to get a summary of the member's provider contacts.
4. Store the provider contact ID.
5. Use the member ID, the provider contact ID, and the GET /members/{memberId}/provider-contacts/{providerContactId} web service to retrieve the details on the member's provider contact.

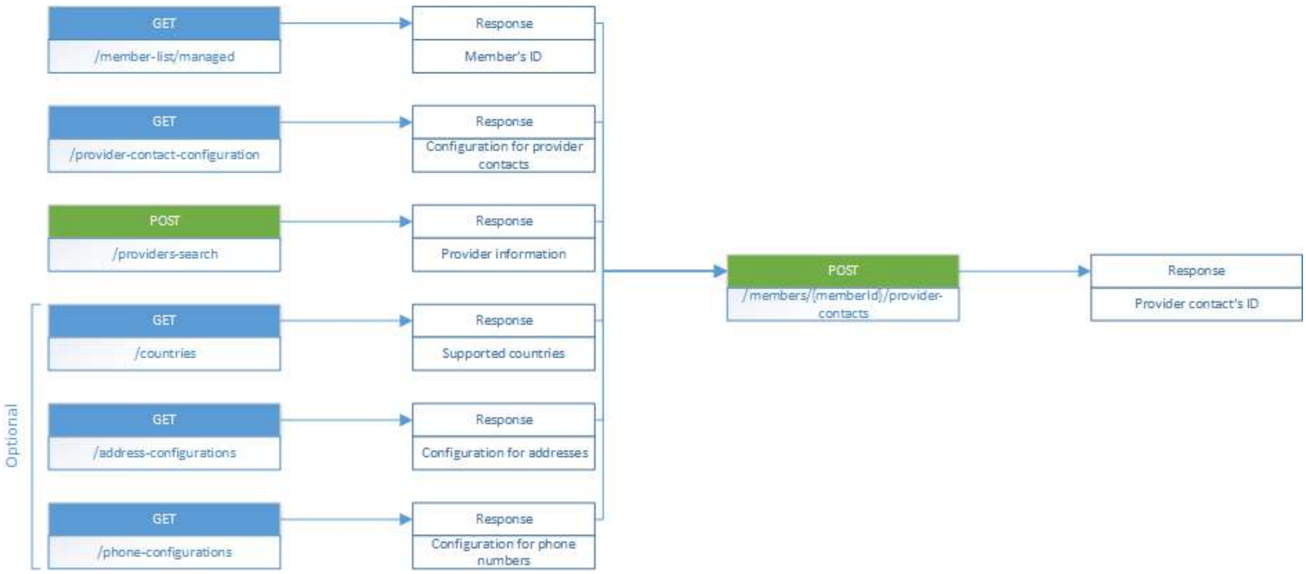
Create a provider contact

You can create a provider contact for a member. You need specific information to use the web services to create a provider contact.

To create a provider contact, you need the following information:

- Member ID
- Configuration to create a provider contact
  - Including configuration for email addresses (optional)
- Provider in the database
- Information on the supported countries (optional)
- Configuration to create an address (optional)
- Configuration to create a phone number (optional)

The following graphic shows how to use web services to create a provider contact for a member.



1. Retrieve the member ID to create a provider contact.

Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the GET /provider-contact-configuration web service to retrieve the configuration to create a provider contact.
4. Search for the provider you want to use for the contact.

   Refer to Search for a provider [231] on page 301 for more information.
5. Store the information on the provider to use for the contact.
6. (Optional) If including international addresses and phone numbers, use the GET /countries web service to retrieve information on the supported countries.
7. (Optional) If including addresses, use the GET /address-configurations web service and the country information, if applicable, to retrieve the configuration to create an address.
8. (Optional) If including phone numbers, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration to create a phone number.
9. Use the member ID, the provider's information, the contact information, and the POST / members/

{memberId}/provider-contacts web service to create a provider contact for the member.

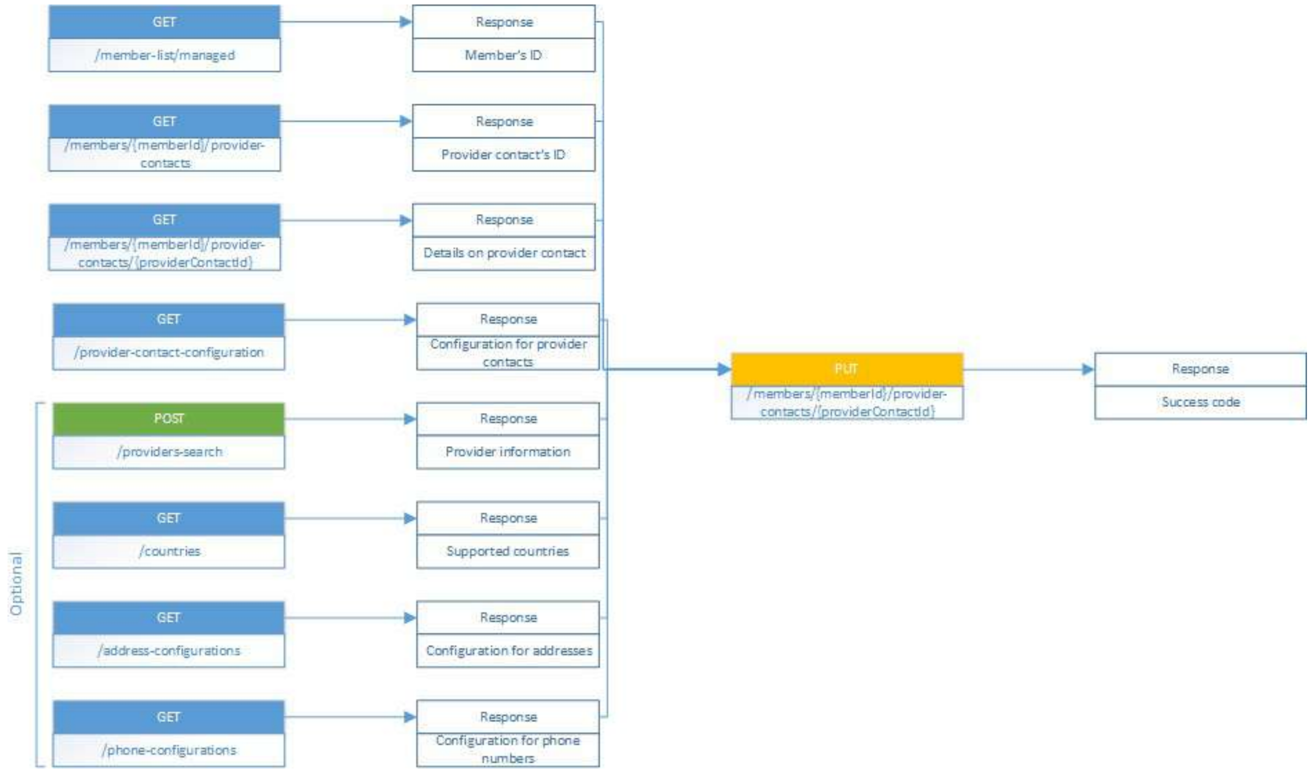
Update a provider contact

You can use web services to retrieve and update a member's provider contact. You need specific information to use the web services to update the member's provider contact.

To update the member's provider contact, you need the following information:

- Member ID
- Provider contact ID
- Details on the provider contact
- Configuration to update a provider contact
  - Includes configuration for email addresses (optional)
- Provider's information (optional)
- Information on the supported countries (optional)
- Configuration to update an address (optional)
- Configuration to update a phone number (optional)

The following graphic shows how to use web services to update a member's provider contact.



1. Retrieve the member ID to retrieve and update the provider contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/provider-contacts web service to retrieve a summary of the member's provider contacts.
4. Store the ID of the provider contact.
5. Use the member ID, the provider contact ID, and the GET /members/{memberId}/provider-contacts/{providerContactId} web service to retrieve the details on the provider contact.
6. Use the GET /provider-contact-configuration web service to get the configuration to update a provider contact.
7. (Optional) If you want to change the provider as the contact, search for the appropriate provider. Refer to Search for a provider [231] on page 301 for more information.
8. (Optional) If adding or updating international addresses or phone numbers, use the GET / countries

   web service to get the information on the supported countries.
9. (Optional) If adding or updating addresses, use the GET /address-configurations web service and the country information, if applicable, to retrieve the configuration for addresses.
10. (Optional) If adding or updating phone numbers, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration for phone numbers.
11. Use the member ID, the provider contact ID, the updated provider contact information, and the PUT / members/{memberId}/provider-contacts/{providerContactId} web service to update the member's provider contact.

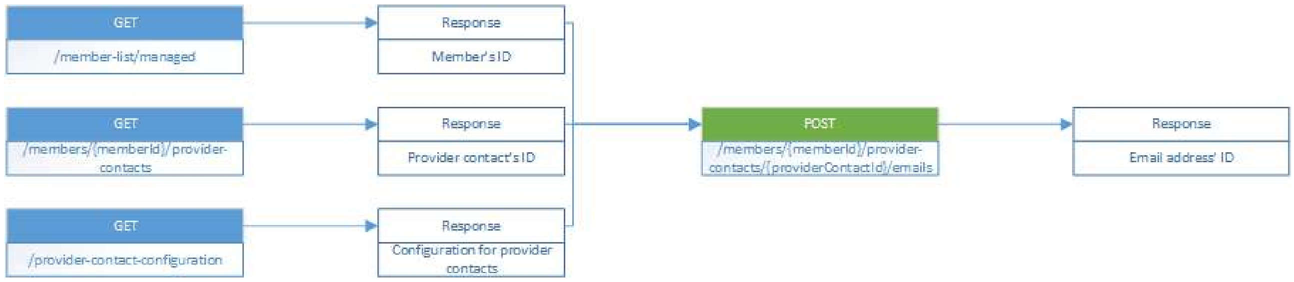
Create an email address for a provider contact

After reviewing the provider contact with the member, you may need to create an email address for the provider contact. You need specific information to use the web services to create an email address for the member's provider contact.

To create an email address, you need the following information:

- Member ID
- Provider contact ID
- Configuration to update a provider contact

The following graphic shows how to use web services to create an email address for a member's provider contact.



1. Retrieve the member ID to retrieve and update the provider contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/provider-contacts web service to get a summary of the member's provider contacts.
4. Store the provider contact ID.
5. Use the GET /provider-contact-configuration web service to get the configuration to create an email address.
6. Use the member ID, the provider contact ID, the information for the email address, and the POST / members/{memberId}/provider-contacts/{providerContactId}/emails web service to create an email address for the member's provider contact.

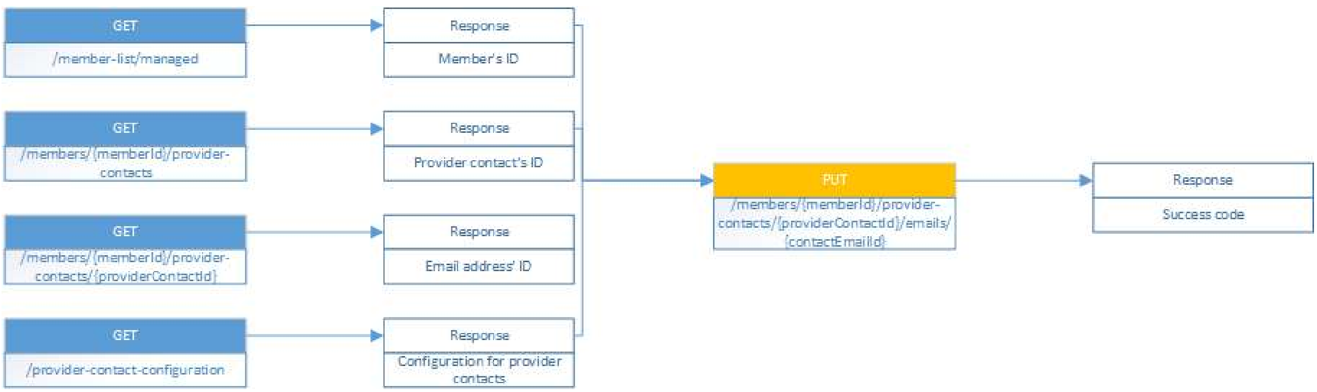
Update an email address for a provider contact

After reviewing the provider contact with the member, you may need to update the provider contact's email address. You need specific information to use the web services to update the email address for the member's provider contact.

To update an email address, you need the following information:

- Member ID
- Provider contact ID
- Details on the provider contact
- Configuration to update an email address

The following graphic shows how to use web services to update an email address for a member's provider contact.



1. Retrieve the member ID to retrieve and update the provider contact.

Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.

2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/provider-contacts web service to retrieve a summary of the member's provider contacts.
4. Store the ID of the provider contact.
5. Use the member ID, the provider contact ID, and the GET /members/{memberId}/provider-contacts/{providerContactId} web service to retrieve the details on the provider contact, including the IDs of any email addresses.
6. Store the ID of the email address.
7. Use the GET /provider-contact-configuration web service to get the configuration to update an email address.
8. Use the member ID, the provider contact ID, the email address ID, the updated email address information, and the PUT /members/{memberId}/provider-contacts/{providerContactId}/ emails/{contactEmailId} web service to update the provider contact's email address.

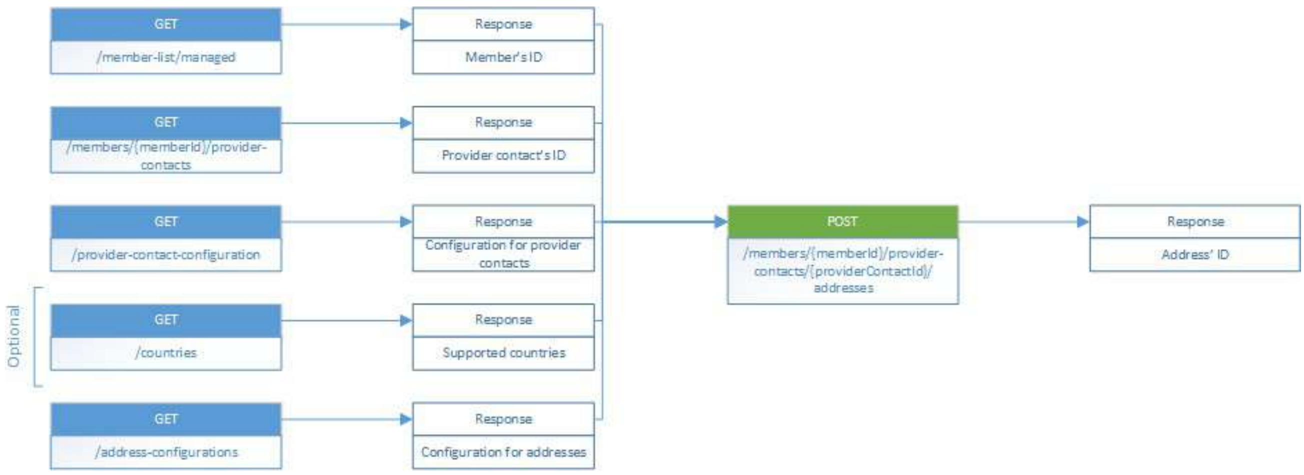
Create an address for a provider contact

After reviewing the provider contact with the member, you can create an address for the contact using web services. You need specific information to use the web services to create an address for the member's provider contact.

To create an address, you need the following information:

- Member ID
- Provider contact ID
- Configuration to update a provider contact
- Information on the supported countries (optional)
- Configuration to create an address

The following graphic shows how to use web services to create an address for a member's provider contact.



1. Retrieve the member ID to retrieve and update the provider contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/provider-contacts web service to retrieve a summary of the member's contacts.
4. Store the ID of the provider contact.

5. Use the GET /provider-contact-configuration web service to retrieve the configuration to update the provider contact.
6. (Optional) If creating an international address, use the GET /countries web service to get the information on the supported countries.
7. Use the GET /address-configurations web service and the country information, if applicable, to get the configuration to create an address.
8. Use the member ID, the provider contact ID, the address information, and the POST / members/

{memberId}/provider-contacts/{providerContactId}/addresses web service to create an address for the member's provider contact.

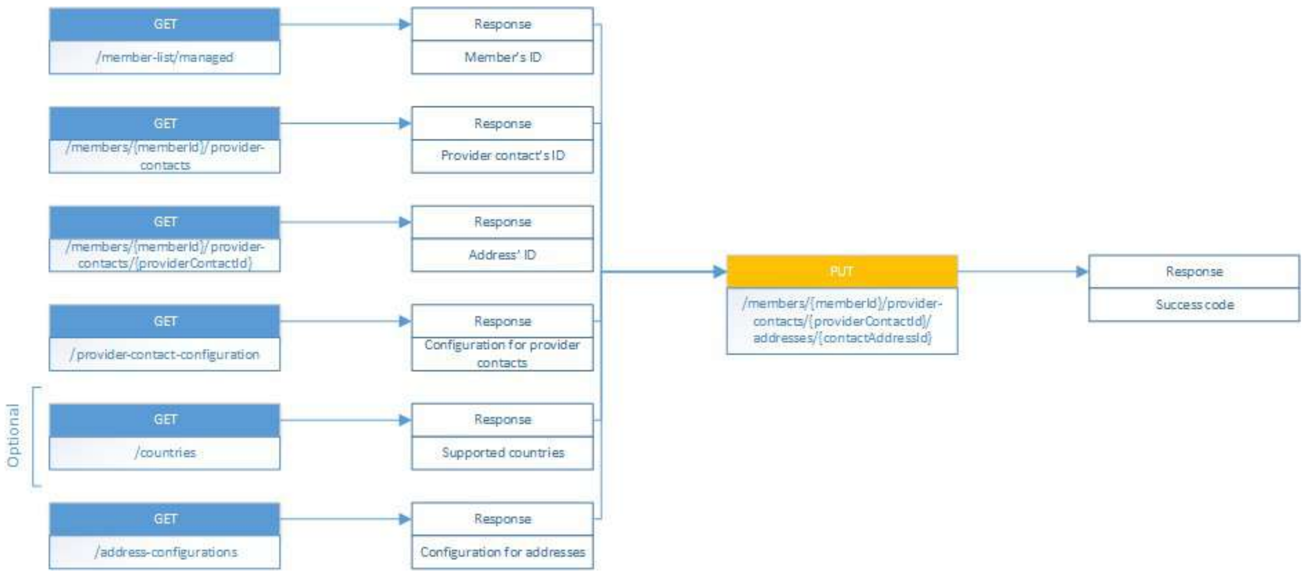
Update an address for a provider contact

After reviewing the provider contact with the member, you can update an address for the contact using web services. You need specific information to use the web services to update an address for the member's provider contact.

To update an address, you need the following information:

- Member ID
- Provider ID
- Details on the provider contact, including the address ID
- Configuration to update a provider contact
- Information on the supported countries (optional)
- Configuration to update an address

The following graphic shows how to use web services to update an address for a member's provider contact.



1. Retrieve the member ID to retrieve and update the provider contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/provider-contacts web service to get a summary of the member's provider contacts.
4. Store the ID of the provider contact.
5. Use the member ID, the provider contact ID, and the GET /members/{memberId}/provider-contacts/{providerContactId} web service to retrieve the details on the provider contact, including IDs of addresses.

6. Store the ID of the address.
7. Use the GET /provider-contact-configuration web service to retrieve the configuration to update a provider contact.
8. (Optional) If updating an international address, use the GET /countries web service to retrieve information on the supported countries.
9. Use the GET /address-configurations web service and the country information, if applicable, to retrieve the configuration to update an address.
10. Use the member ID, the provider contact ID, the address ID, the updated address information, and the PUT /members/{memberId}/provider-contacts/{providerContactId}/addresses/

{contactAddressId} web service to update the address of a member's provider contact.

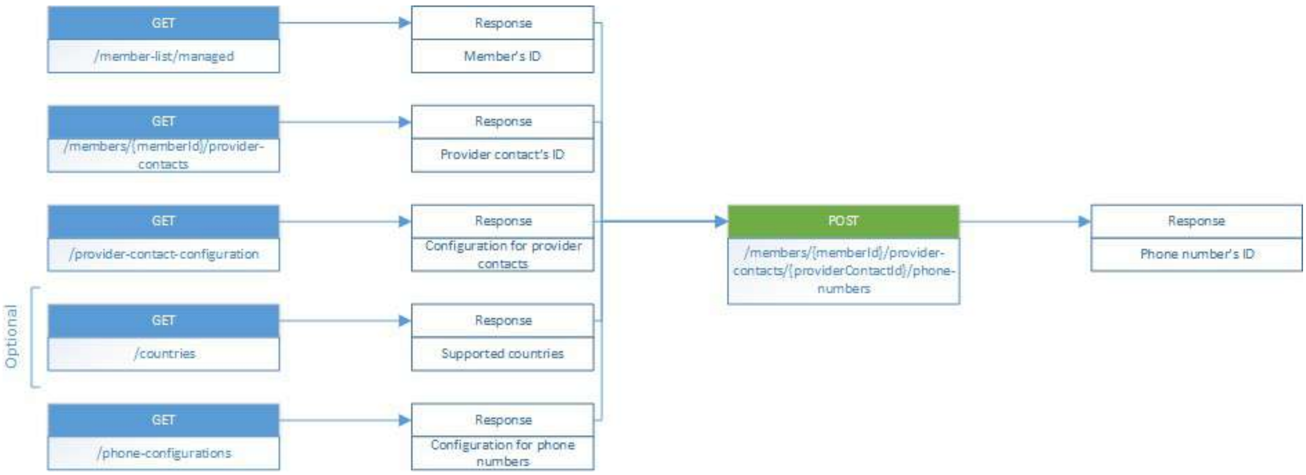
Create a phone number for a provider contact

After reviewing the provider contact with the member, you may need to create a phone number for the contact. You need specific information to use the web services to create a phone number for the member's provider contact.

To create a phone number, you need the following information:

- Member ID
- Provider contact ID
- Configuration to update a provider contact
- Information on the supported countries (optional)
- Configuration to create a phone number

The following graphic shows how to use web services to create a phone number for a member's provider contact.



1. Retrieve the member ID to retrieve and update the provider contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/provider-contacts web service to retrieve a summary of the member's provider contacts.
4. Store the ID of the provider contact.
5. Use the GET /provider-contact-configuration web service to retrieve the configuration to update a provider contact.
6. (Optional) If creating an international phone number, use the GET /countries web service to get information on the supported countries.
7. Use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration to create a phone number.

8. Use the member ID, the provider contact ID, the phone information, and the POST /members/{member Id}/provider-contacts/{providerContactId}/phone-numbers web service to create a phone number for the member's provider contact.

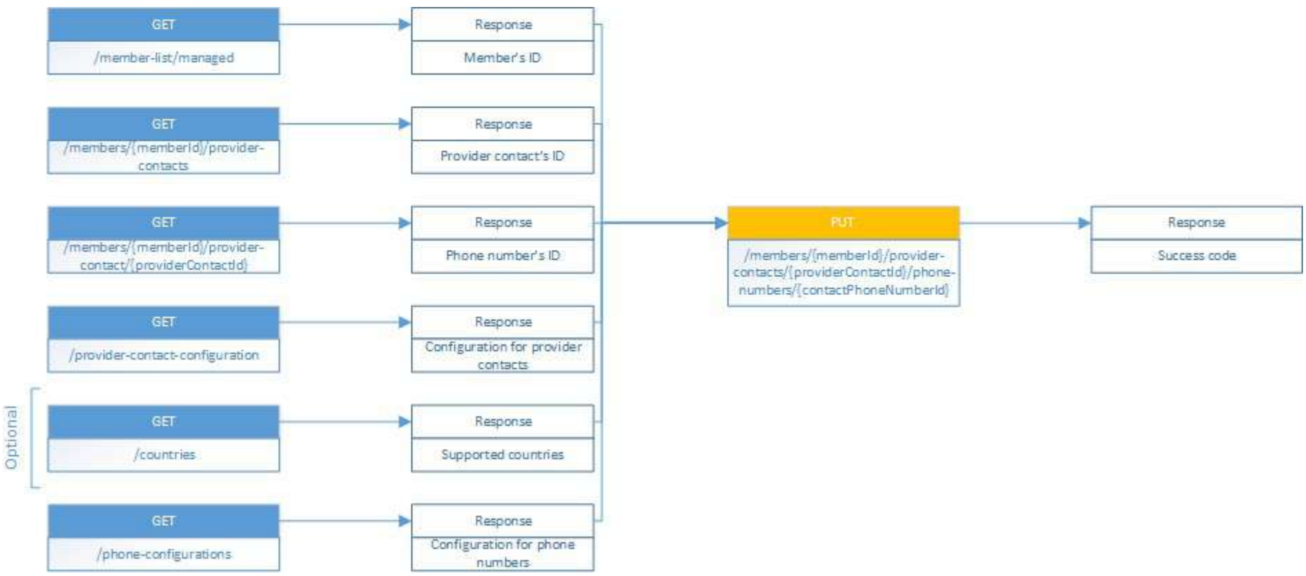
Update a phone number for a provider contact

After reviewing the provider contact with the member, you may need to update the contact's phone number. You need specific information to use web services to update the phone number for the member's provider contact.

To update the phone number, you need the following information:

- Member ID
- Provider contact ID
- Details on the provider contact
- Configuration to update a provider contact
- Information on the supported countries (optional)
- Configuration to update a phone number

The following graphic shows how to use web services to update a phone number for a member's provider contact.



1. Retrieve the member ID to retrieve and update the provider contact.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/provider-contacts web service to retrieve a summary of the member's provider contacts.
4. Store the ID of the provider contact.
5. Use the member ID, the provider contact ID, and the GET /members/{memberId}/provider-contacts/{providerContactId} web service to retrieve the details on the provider contact, including the IDs of the associated phone numbers.
6. Store the ID of the phone number.
7. Use the GET /provider-contact-configuration web service to retrieve the configuration to update a provider contact.
8. (Optional) If updating an international phone number, use the GET /countries web service to retrieve information on the supported countries.
9. Use the GET /phone-configurations web service and the country information, if applicable, to get the configuration to update phone numbers.

10. Use the member ID, the provider contact ID, the phone number ID, the updated phone information, and the PUT /members/{memberId}/provider-contacts/{providerContactId}/phone- numbers/{contactPhoneNumberId} web service to update the phone number for the member's provider contact.

Providers

You can use web services to interact with provider information.

The following sections describe how to use web services to interact with provider information. For example, you can use web services to search for a provider and to retrieve the provider's network information.

Topics in this section

You may need information on a provider for an authorization or a contact. You need specific information to use web services to search for a provider.

You may need to compare providers' networks or review the provider's network information. You need specific information to use the web services to retrieve the provider's network.

You may need to confirm a provider is in a member's network. You need specific information to use the web services to retrieve confirmation that the provider is in a member's network.

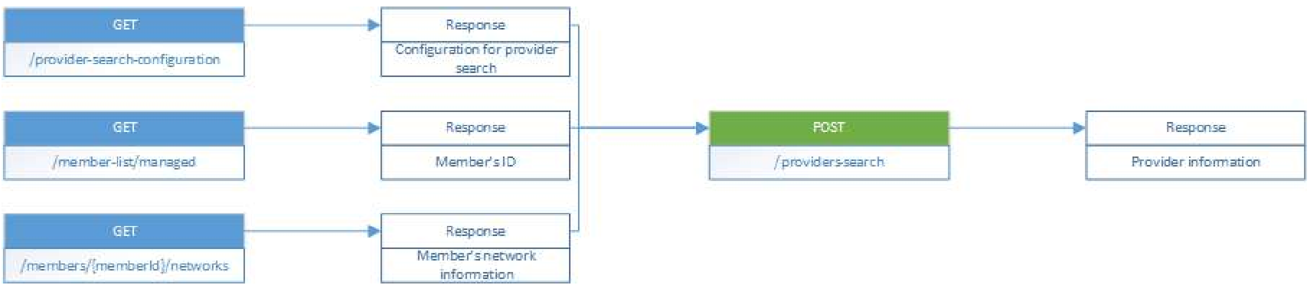
Search for a provider

You may need information on a provider for an authorization or a contact. You need specific information to use web services to search for a provider.

To search for a provider, you need the following information:

- Configuration to perform a provider search
- Member ID (optional)
- Member's network information (optional)

The following graphic shows how to use web services to search for a provider.



1. Use the GET /provider-search-configuration web service to get the configuration to perform a provider search.
2. (Optional) If looking for a provider for a member related artifact, retrieve and store the member ID to use in the search.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
3. (Optional) If looking for a provider within a particular member's network, retrieve the member's network information.

   Refer to Get the member's networks [169] on page 223 for more information.

4. Use the configuration for the search, any additional search criteria, and the POST / providers-search

web service to search for a provider.

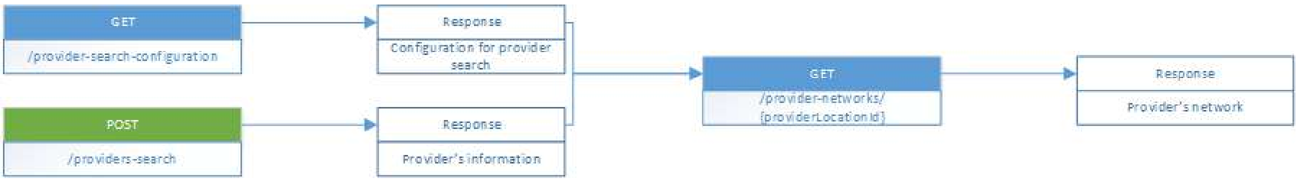
Get a provider's network

You may need to compare providers' networks or review the provider's network information. You need specific information to use the web services to retrieve the provider's network.

To get the provider's network, you need the following information:

- Provider's location ID

The following graphic shows how to use web services to retrieve information on a provider's network.



1. Search for the provider you want to view.

   Refer to Search for a provider [231] on page 301 for more information.
2. Store the ID of the provider's location.
3. Use the provider's location ID and the GET /provider-networks/{providerLocationId} web service to retrieve the provider's networks.

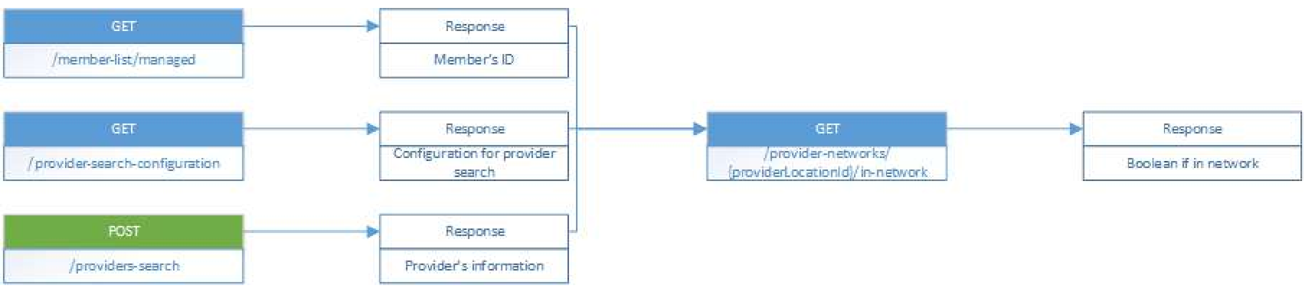
Get information if the provider is in a member's network

You may need to confirm a provider is in a member's network. You need specific information to use the web services to retrieve confirmation that the provider is in a member's network.

To determine if the provider is in the member's network, you need the following information:

- Member ID
- Provider's location ID

The following graphic shows how to use web services to determine if a provider is in a member's network.



1. Retrieve the member ID.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the provider.

   Refer to Search for a provider [231] on page 301 for more information.
4. Store the provider's location ID.
5. Use the member ID, the provider's location ID, and the GET /provider-networks/{provider LocationId}/in-network web service to determine if the provider is in the member's network.

Queues

You can use web services to interact with system queues.

The following sections describe how to use web services to interact with queues. For example, you can use web services to get information on the available queues.

Topics in this section

You may need to assign a task to a queue. You can use web services to get information on the available queues.

Get information on the available queues

You may need to assign a task to a queue. You can use web services to get information on the available queues.

The following graphic shows how to use web services to retrieve the available queues.

Use the GET /queues and the applicable parameter to get information on the available queues.

Referrals

You can use web services to interact with a member's referrals.

The following describes how to use web services to interact with a member's referrals. For example, you can retrieve a summary of the member's referrals, create a referral, and update a referral.

Topics in this section

You may need to review the referrals with the member. You need specific information to use web services to retrieve a summary of the member's referrals.

You may need to review the referral with the member. You need specific information to use web services to retrieve the details on the member's referral.

After reviewing the member's current referrals, you may need to create a referral. You need specific information to use web services to create a referral for the member.

After reviewing the referral with the member, you may need to update the referral. You need specific information to use web services to update a member's referral.

After reviewing the referral with the member, you may need to update the referral with the information from the associated case. You need specific information to use web services to update a member's referral with case information.

After reviewing the member's current referrals, you might need to create a draft referral. You need specific information to use web services to create a draft referral for the member.

After creating a draft referral, you might need to update the draft referral. You need specific information to use web services to update a member's draft referral.

After creating a the member's draft referrals, you might need to submit a draft referral. You need specific information to use web services to sibmit a draft referral for the member.

After reviewing the member's current referrals, you might need to create a new referral, possibly based on a draft referral. You need specific information to use web services to create a referral for the member.

You might need to review the referrals with the member. You need specific information to use web services to retrieve a summary of the member's referrals.

After reviewing the referral with the member, you might need to update the referral with the information from the associated case. You need specific information to use web services to update a member's referral with case information.

You might need to review the referral with the member. You need specific information to use web services to retrieve the details on the member's referral.

After reviewing the referral with the member, you might need to update the referral. You need specific information to use web services to update a member's referral.

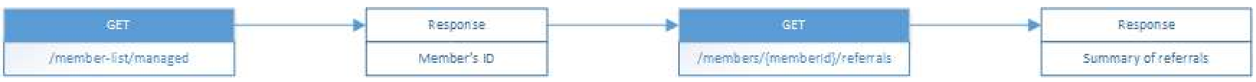
Get a summary of the member's referrals

You may need to review the referrals with the member. You need specific information to use web services to retrieve a summary of the member's referrals.

To retrieve a summary of the member's referrals, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a summary of a member's referrals.



1. Retrieve the member ID to retrieve the summary.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/referrals web service to retrieve a summary of the member's referrals.

Get the details on the referral

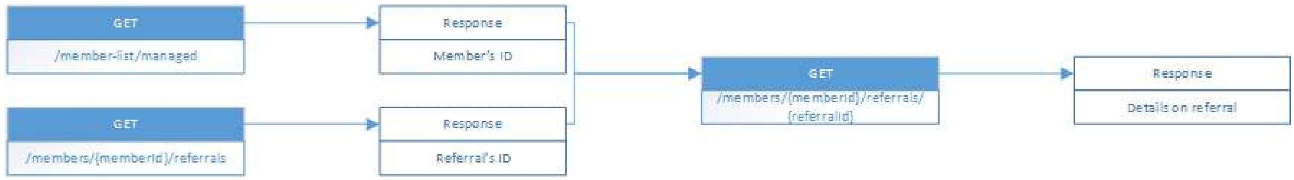
You may need to review the referral with the member. You need specific information to use web services to retrieve the details on the member's referral.

To retrieve the details on a referral, you need the following information:

- Member ID

- Referral ID

The following graphic shows how to use web services to retrieve the details on a member's referrals.



1. Retrieve the member ID to retrieve the summary.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/referrals web services to retrieve a summary of the member's referrals.
4. Store the ID of the referral.
5. Use the member ID, the referral ID, and the GET /members/{memberId}/referrals/{referral Id} web service to retrieve the details on the referral.

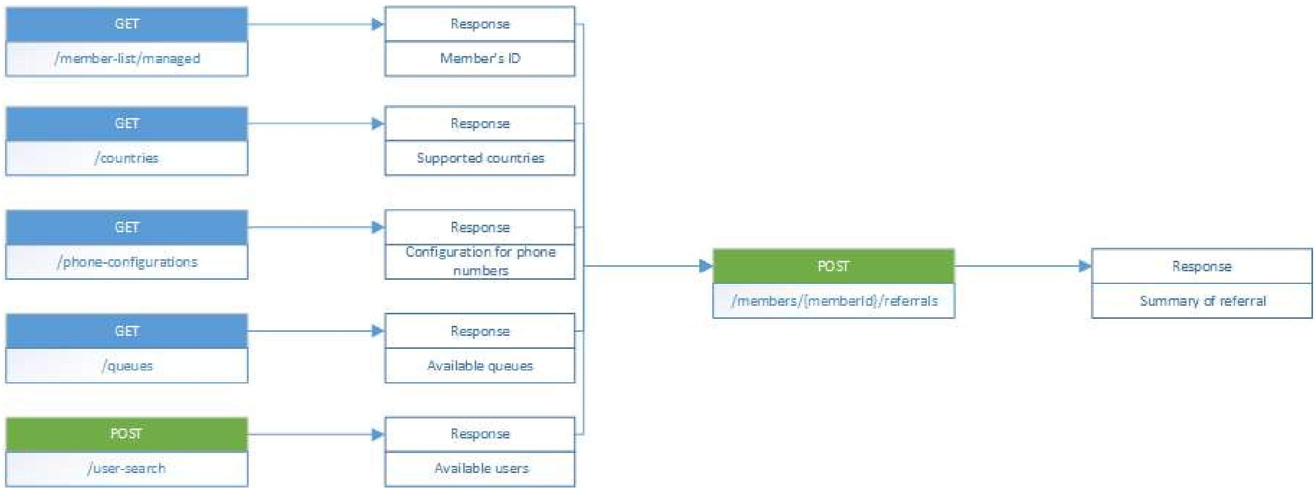
Create a referral

After reviewing the member's current referrals, you may need to create a referral. You need specific information to use web services to create a referral for the member.

To create a referral, you need the following information:

- Member ID
- Configuration to create a referral
- Information on the supported countries (optional)
- Configuration for phone numbers (optional)
- Appropriate assignee, which can be a queue or a user (optional)

The following graphic shows how to use web services to create a referral for a member.



1. Retrieve the member ID to create a referral.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. If including an international phone number, use the GET /countries web service to retrieve information on the supported countries.
4. If including a phone number, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration to create a phone number.

5. If including information for the next task to be created, use the GET /queues or POST /user-search

   web service to retrieve the appropriate queue or user, respectively, to be assigned the task.
6. Use the member ID, the referral's information, and the POST /members/{memberId}/referrals web service to create a referral for the member.

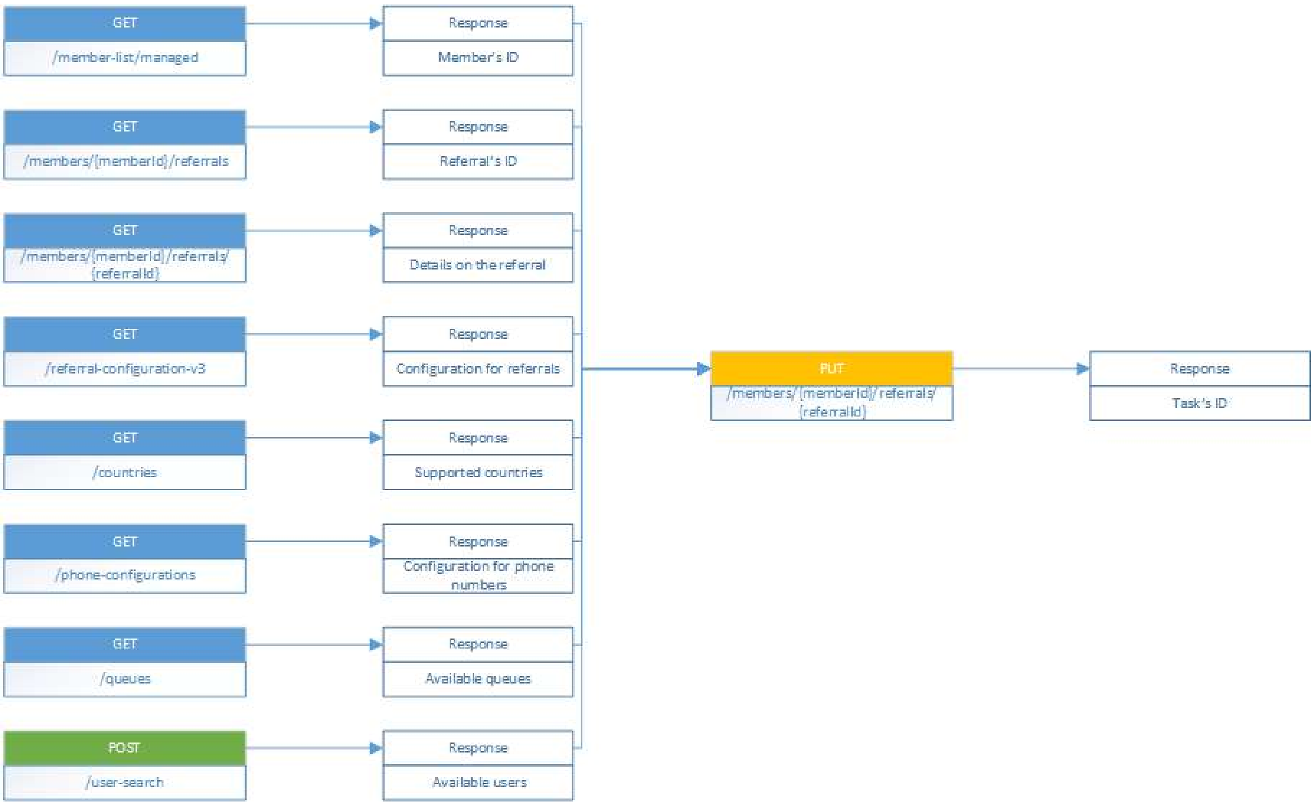
Update a referral

After reviewing the referral with the member, you may need to update the referral. You need specific information to use web services to update a member's referral.

To update a referral, you need the following information:

- Member ID
- Referral ID
- Details on the referral
- Configuration to update a referral
- Information on the supported countries (optional)
- Configuration for phone numbers (optional)
- Information for the next task's assignee (optional)

The following graphic shows how to use web services to update a member's referral.



1. Retrieve the member ID to update the referral.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/referrals to retrieve a summary of the member's referrals.
4. Store the ID of the referral.
5. Use the member ID, the referral ID, and the GET /members/{memberId}/referrals/{referral Id} web service to retrieve the details on the referral.

6. Use the GET /referral-configuration-v3 web service to retrieve the configuration to update a referral.
7. If adding or updating an international phone number, use the GET /countries web service to retrieve information on the supported countries.
8. If adding or updating a phone number, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration for phone numbers.
9. If adding or updating the information for the next task, use the GET /queues or the POST /user- search web service to retrieve information on the appropriate queue or user, respectively, to be the task's assignee.
10. Use the member ID, the referral ID, the updated referral information, and the PUT / members/{member Id}/referrals/{referralId} web service to update the member's referral.

Update a referral with a case

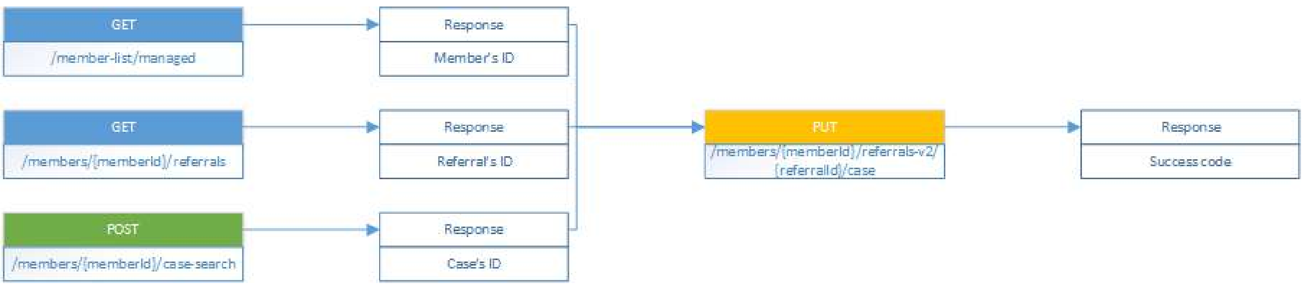
After reviewing the referral with the member, you may need to update the referral with the information from the associated case. You need specific information to use web services to update a member's referral with case information.

If the referral is already associated with a case, the information sent using this web service overrides the configuration.

To update a referral with a case, you need the following information:

- Member ID
- Referral ID
- Case ID

The following graphic shows how to use web services to update a member's referral with case information.



1. Retrieve the member ID to retrieve the summary.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/referrals web services to get a summary of the member's referrals.
4. Store the ID of the referral.
5. Search for the case you want to link to the referral.

   The case must be open. Refer to Search a member's cases [114] on page 151 for more information.
6. Store the case ID or the case number.
7. Use the member ID, the referral ID, the case's information, and the PUT /members/ {memberId}/ referrals-v2/{referralId}/case web service to associate the case to the referral.

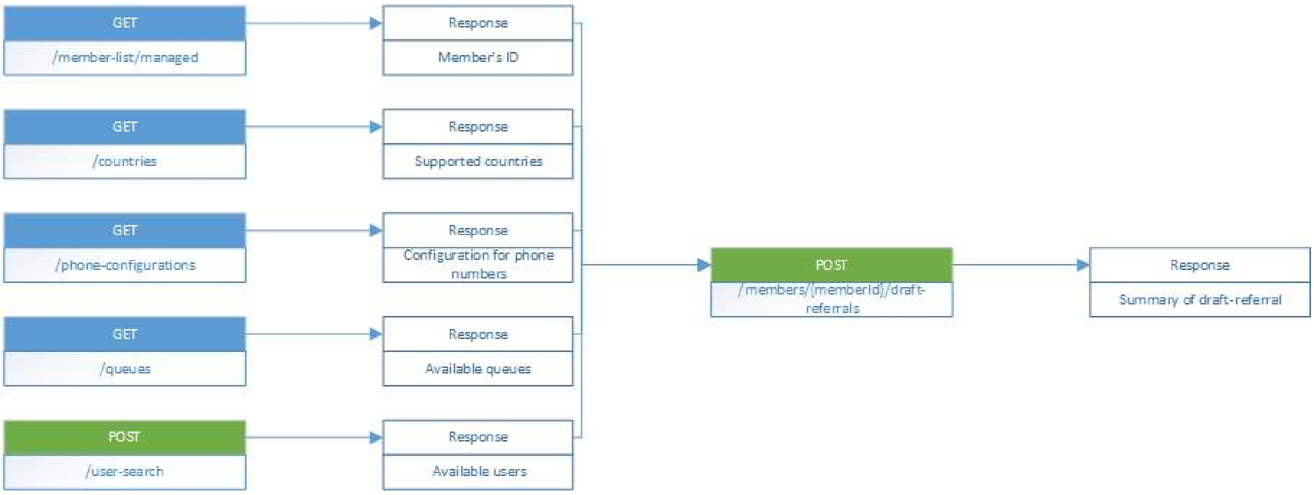
Create a draft referral

After reviewing the member's current referrals, you might need to create a draft referral. You need specific information to use web services to create a draft referral for the member.

To create a draft referral, you need the following information:

- Member ID
- Member type
- The option of which referral related screen configuration to validate against

The following graphic shows how to use web services to create a referral for a member.



1. Retrieve the member ID to create a draft referral.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.
3. If including an international phone number, use the GET /countries web service to retrieve information on the supported countries.
4. If including a phone number, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration to create a phone number.
5. If including information for the next task to be created, use the GET /queues or POST / user-search

   web service to retrieve the appropriate queue or user, respectively, to be assigned the task.
6. Use the member ID, the draft referral's information, and the POST /members/{memberId}/ draft- referrals web service to create a draft referral for the member.

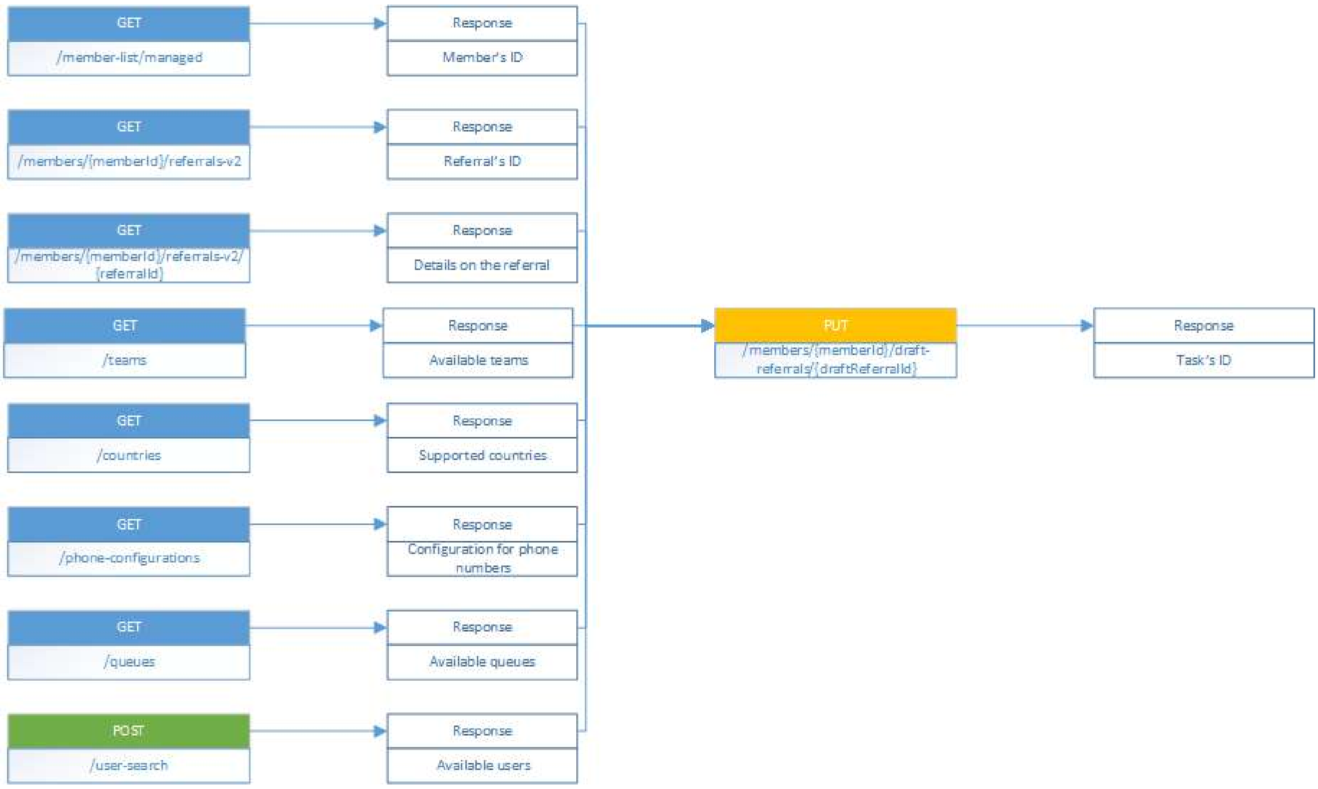
Update a draft referral

After creating a draft referral, you might need to update the draft referral. You need specific information to use web services to update a member's draft referral.

To update a draft referral, you need the following information:

- Member ID
- Member type
- Draft referral ID
- The option on which referral related screen configuration to validate agains

The following graphic shows how to use web services to update a member's referral.



1. Retrieve the member ID to update the draft referral.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/referrals-v2 to retrieve a summary of the member's referrals.
4. Store the ID of the referral.
5. Use the member ID, the referral ID, and the GET /members/{memberId}/referrals-v2/{referralId} web service to retrieve the details on the referral.
6. Use the Get /teams web service to retrieve the available teams.
7. If adding or updating an international phone number, use the GET /countries web service to retrieve information on the supported countries.
8. If adding or updating a phone number, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration for phone numbers.
9. If adding or updating the information for the next task, use the GET /queues or the POST /user- search web service to retrieve information on the appropriate queue or user, respectively, to be the task's assignee.
10. Use the member ID, the referral ID, the updated referral information, and the PUT /members/{member Id}/draft-referrals/{draftReferralId} web service to update the member's draft referral.

Submit an existing draft referral

After creating a the member's draft referrals, you might need to submit a draft referral. You need specific information to use web services to sibmit a draft referral for the member.

To submit a draft referral, you need the following information:

- Member ID
- Member type
- Draft Referral ID
- The options of which referral related screen to validate against

The following graphic shows how to use web services to update a member's referral.

1. Retrieve the member ID to update the draft referral.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/referrals and GET /members/{member Id}/referrals-v2 web services to retrieve a summary of the member's referrals.
4. Store the ID of the referral.
5. Use the member ID, the referral ID, and the GET /members/{memberId}/referrals/{referral Id} and GET /members/{memberId}/referrals-v2/{referralId} web services to retrieve the details on the referral.
6. Use the Get /teams web service to retrieve the available teams.
7. If adding or updating an international phone number, use the GET /countries web service to retrieve information on the supported countries.
8. If adding or updating a phone number, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration for phone numbers.
9. If adding or updating the information for the next task, use the GET /queues or the POST /user- search web service to retrieve information on the appropriate queue or user, respectively, to be the task's assignee.
10. Use the member ID, the referral ID, the updated referral information, and the POST /members/{member Id}/draft-referrals/{draftReferralId} web service to submit the member's draft referral.

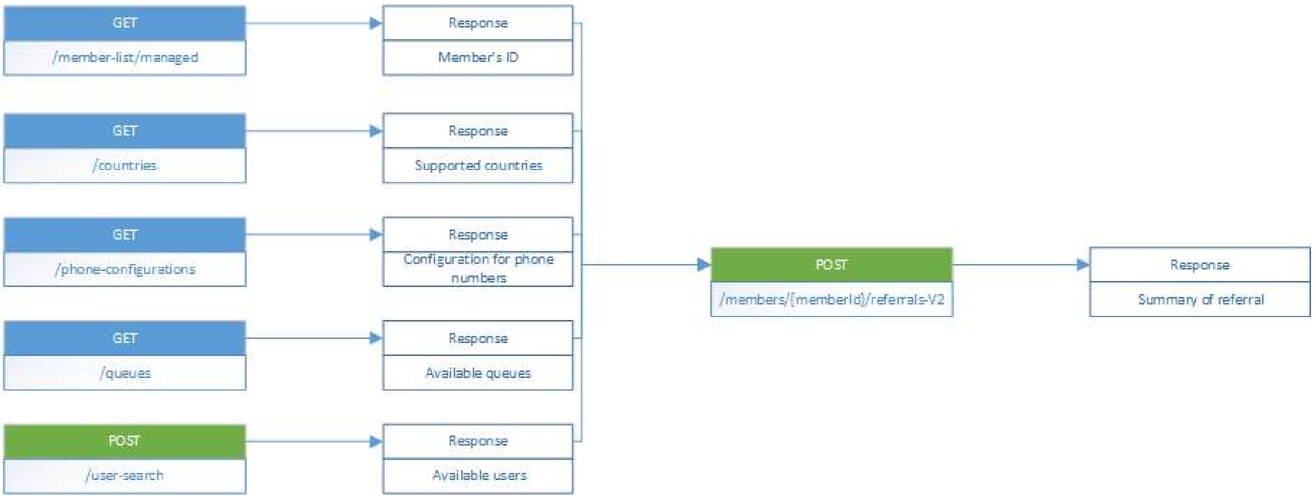
Create a referral, Version 2

After reviewing the member's current referrals, you might need to create a new referral, possibly based on a draft referral. You need specific information to use web services to create a referral for the member.

To create a referral, you need the following information:

- Internal member ID
- Draft referral ID (optional)

The following graphic shows how to use web services to create a referral for a member.



1. Retrieve the member ID to create a referral.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. If including an international phone number, use the GET /countries web service to retrieve information on the supported countries.
4. If including a phone number, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration to create a phone number.
5. If including information for the next task to be created, use the GET /queues or POST / user-search

   web service to retrieve the appropriate queue or user, respectively, to be assigned the task.
6. Use the member ID, the referral's information, and the POST /members/{memberId}/ referrals-v2

web service to create a referral for the member.

Get a summary of the member's referrals, Version 2

You might need to review the referrals with the member. You need specific information to use web services to retrieve a summary of the member's referrals.

To retrieve a summary of the member's referrals, you need the following information:

- Member ID

The following graphic shows how to use web services to retrieve a summary of a member's referrals.

1. Retrieve the member's list of referrals, using the GET /members/{memberId}/referrals-v2/

   {referralId web services.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/referrals-v2 web service to retrieve a summary of the member's referrals.

Update a referral with a case, Version 2

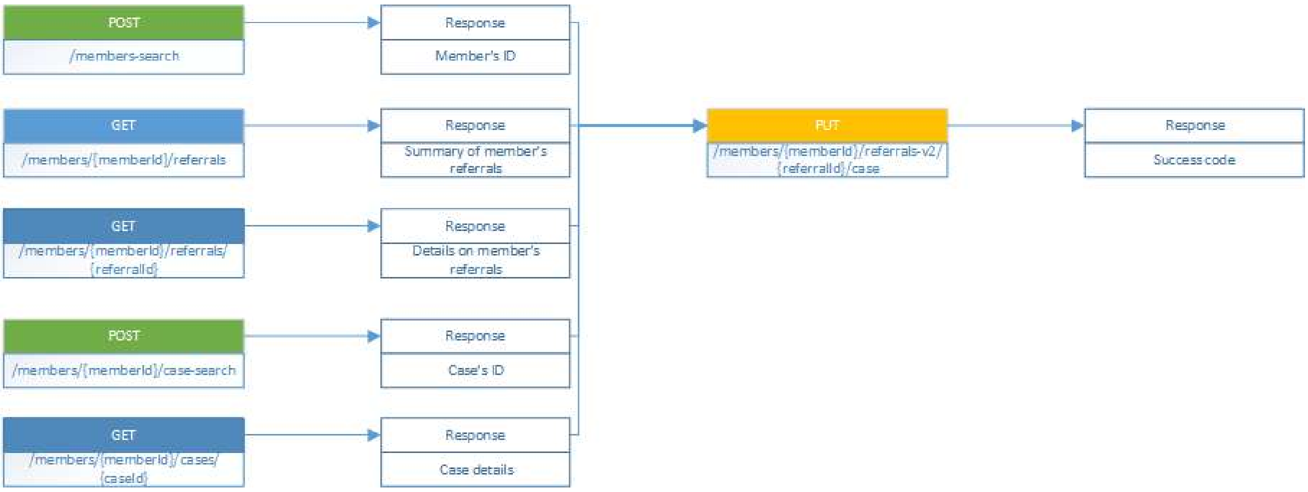
After reviewing the referral with the member, you might need to update the referral with the information from the associated case. You need specific information to use web services to update a member's referral with case information.

If the referral is already associated with a case, the information sent using this web service overrides the configuration.

To update a referral with a case, you need the following information:

- Member ID
- Member ID type
- Referral ID

The following graphic shows how to use web services to update a member's referral with case information.



1. Do a member search and retrieve the member ID using the POST /members-search web service.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/referrals web services to get a summary of the member's referrals.
4. Store the ID of the referral.
5. Use the referral ID and the GET /members/{memberId}/referrals/{referralId web service to retrieve the details of the referrals.
6. Search for the case you want to link to the referral using the POST /members/{memberId}/case- search web service.

   The case must be open. Refer to Search a member's cases [114] on page 151 for more information.
7. Store the case ID or the case number.
8. Use the member ID, the referral ID, the case ID, and the GET /members/{memberId}/cases/{case Id} web service to retrieve the case details.
9. Use the member ID, referral ID, and case ID, and the PUT /members/{memberId}/referrals-v2/

{referralId}/case web service to associate the case to the referral.

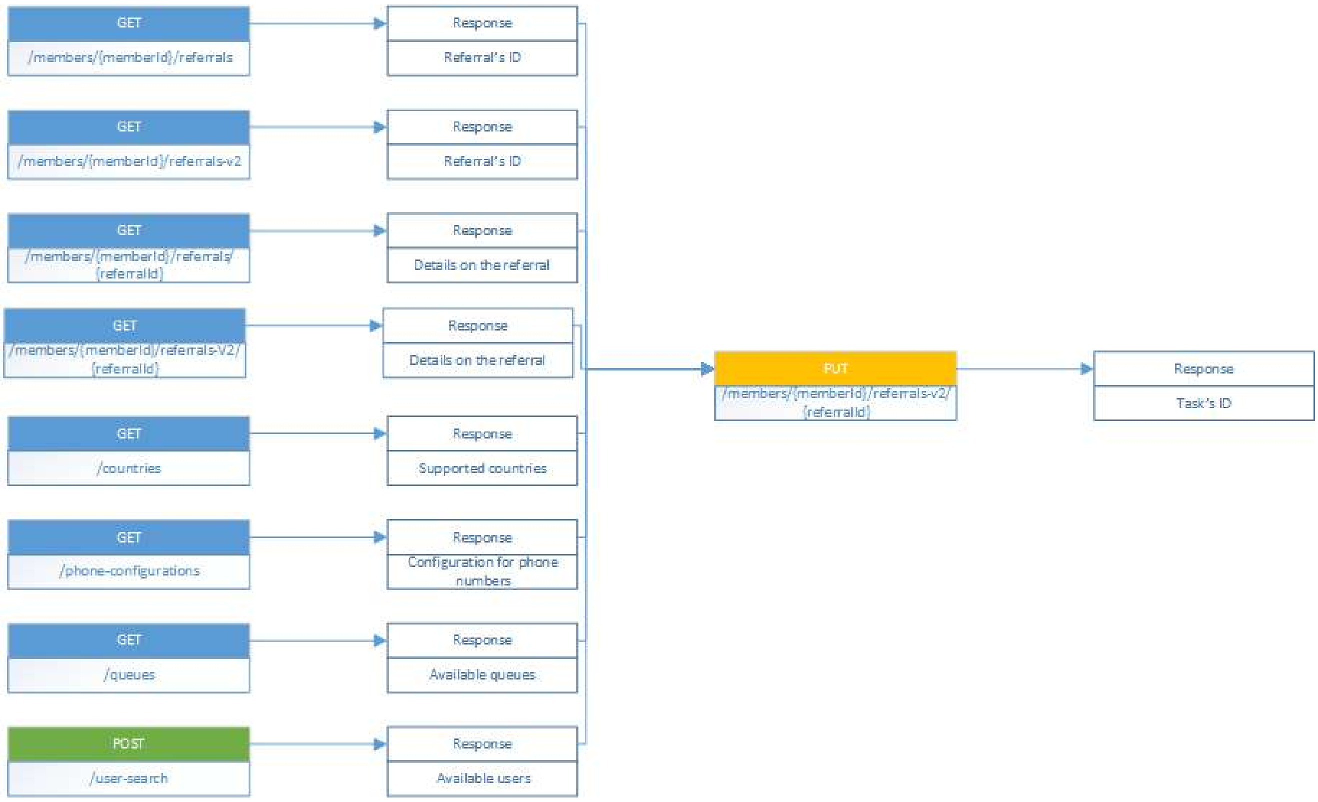
Update a referral, Version 2

After reviewing the referral with the member, you might need to update the referral. You need specific information to use web services to update a member's referral.

To update a referral, you need the following information:

- Member ID
- Member ID type
- Referral ID
- Complete referral task (defaults to true)

The following graphic shows how to use web services to update a member's referral.



1. Retrieve the member ID to update the referral.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/referrals, GET /members/{member Id}/referrals-v2 web services to retrieve a summary of the member's referrals.
4. Store the ID of the referral.
5. Use the member ID, the referral ID, and the GET /members/{memberId}/referrals/{referral Id} and GET /members/{memberId}/referrals-v2/{referralId} web services to retrieve the details on the referral.
6. If adding or updating an international phone number, use the GET /countries web service to retrieve information on the supported countries.
7. If adding or updating a phone number, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration for phone numbers.
8. If adding or updating the information for the next task, use the GET /queues or the POST /user- search web service to retrieve information on the appropriate queue or user, respectively, to be the task's assignee.
9. Use the member ID, the referral ID, the updated referral information, and the PUT / members/{member Id}/referrals-v2/{referralId} web service to update the member's referral.

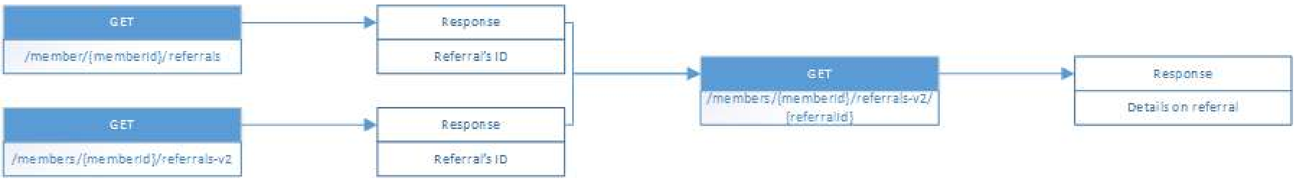
Get the details on the referral, Version 2

You might need to review the referral with the member. You need specific information to use web services to retrieve the details on the member's referral.

To retrieve the details on a referral, you need the following information:

- Member ID
- Referral ID

The following graphic shows how to use web services to retrieve the details on a member's referrals.



1. Retrieve the member ID to retrieve the summary.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/referrals and GET /members/{member Id}/referrals-v2 web services to retrieve a summary of the member's referrals.
4. Store the ID of the referral.
5. Use the member ID, the referral ID, and the GET /members/{memberId}/referrals-v2/

{referralId} web service to retrieve the details on the referral.

Requests for information (RFIs)

You can use web services to interact with a member's RFIs.

The following sections describe how to use web services to interact with a member's RFIs. For example, you can use web services to edit an RFI, to add an attempt to an RFI, to and void an attempt on an RFI.

Topics in this section

Update a request for information (RFI) [244] on page 318

After reviewing the member's RFI, you may need to update the RFI. You need specific information to use web services to update the member's RFI.

Create a task attempt on a request for information (RFI) [245] on page 319

You may have tried to acquire the requested information. You need specific information to use web services to create a task attempt on a member's RFI.

Void a task attempt on a request for information (RFI) [246] on page 320

You may have erroneously recorded an attempt on an RFI. You need specific information to use web services to void a task attempt on a member's RFI.

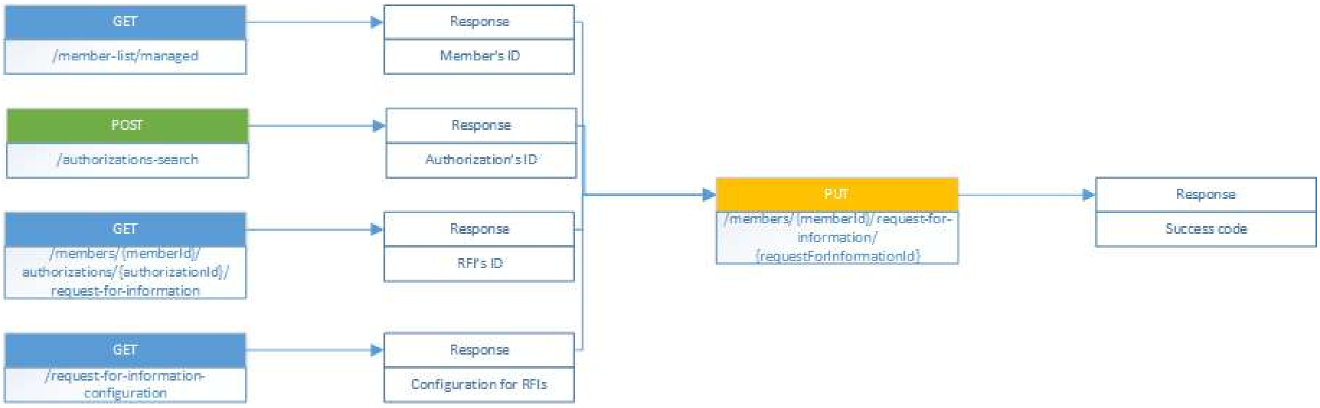
Update a request for information (RFI)

After reviewing the member's RFI, you may need to update the RFI. You need specific information to use web services to update the member's RFI.

To update a member's RFI, you need the following information:

- Member ID
- Authorization ID
- RFI ID
- Configuration to update an RFI

The following graphic shows how to use web services to update a member's RFI.



1. Retrieve the member ID to create a referral.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that has the RFI you want to update.

   Refer toSearch for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/ authorizations/

   {authorizationId}/request-for-information web service to get a summary of the RFIs on the authorization.
6. Store the ID of the RFI.
7. Use the GET /request-for-information-configuration web service to get the configuration to update the RFI.
8. Use the member ID, the RFI ID, the updated information, and the PUT /members/ {memberId}/ request-for-information/{requestForInformationId} web service to update the RFI.

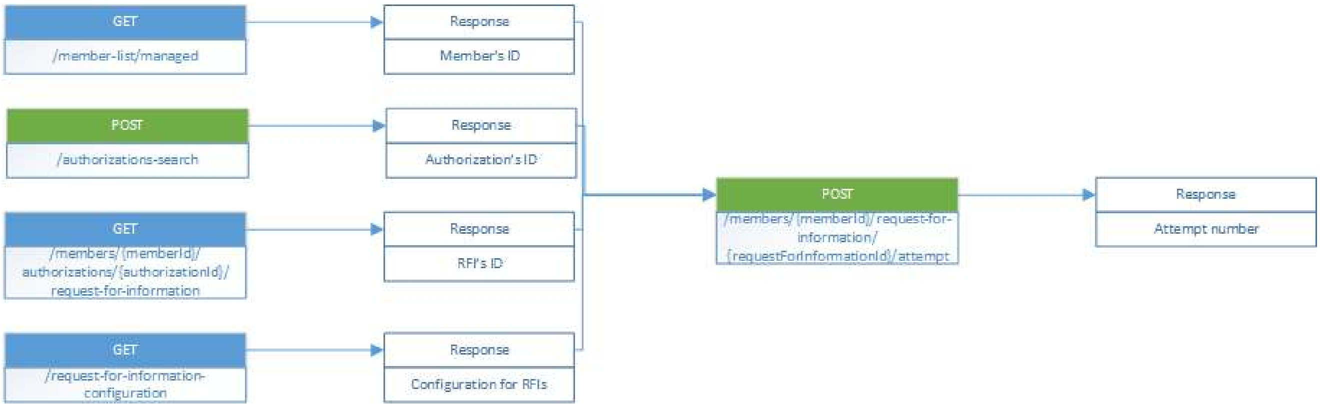
Create a task attempt on a request for information (RFI)

You may have tried to acquire the requested information. You need specific information to use web services to create a task attempt on a member's RFI.

To create a task attempt, you need the following information:

- Member ID
- Authorization ID
- RFI ID
- Configuration to create an attempt

The following graphic shows how to use web services to create a task attempt on a member's RFI.



1. Retrieve the member ID to create an attempt.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that has the RFI you want to update.

   Refer toSearch for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/ authorizations/

   {authorizationId}/request-for-information web service to get a summary of the RFIs on the authorization.
6. Store the ID of the RFI.
7. Use the GET /request-for-information-configuration web service to retrieve the configuration to create a task attempt.
8. Use the member ID, the RFI ID, the attempt information, and the POST /members/ {memberId}/ request-for-information/{requestForInformationId}/attempt web service to create an attempt on the member's RFI.

Void a task attempt on a request for information (RFI)

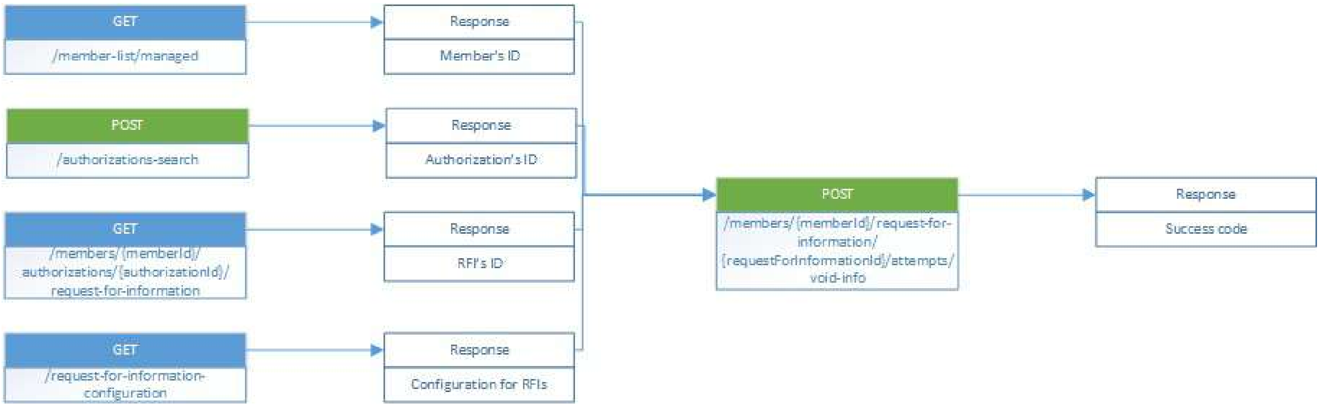
You may have erroneously recorded an attempt on an RFI. You need specific information to use web services to void a task attempt on a member's RFI.

To void a task attempt, you need the following information:

- Member ID
- Authorization ID
- RFI ID
- Configuration to void a task attempt

If you void the only task attempt on the RFI, the entire RFI is voided.

The following graphic shows how to use web services to void a task attempt on a member's RFI.



1. Retrieve the member ID to update their referral.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization that has the RFI you want to update.

   Refer toSearch for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/authorizations/

   {authorizationId}/request-for-information web service to get a summary of the RFIs on the authorization.
6. Store the ID of the RFI.
7. Use the GET /request-for-information-configuration web service to retrieve the configuration to void a task attempt.
8. Use the member ID, the RFI ID, the void information, and the POST /members/{memberId}/request-for-information/{requestForInformationId}/attempts/void-info web service to void the latest attempt on the member's RFI.

Rx authorizations

You can use web services to interact with a member's Rx authorizations.

The following sections describe how to use web services to interact with a member's Rx authorizations. For example, you can retrieve the appeals on the Rx authorization.

Topics in this section

Get the BHP configuration for Rx authorizations [249] on page 323

You can get a member's BHP configuration for Rx authorizations using web services. You need specific information to use the web service to retrieve the BHP configuration for Rx authorizations.

Create an Rx authorization [249] on page 324

After meeting with a member, you may need to create an Rx authorization. You need specific information to use web services to create an Rx authorization.

Get the header information on an Rx authorization [251] on page 327

You may need to review the header information on an Rx authorization with the member. You need specific information to use web services to retrieve the header information on a member's Rx authorization.

Get the requesting provider on an Rx authorization [252] on page 327

You may need to review the requesting provider on the Rx authorization with the member. You need specific information to retrieve the requesting provider on a member's Rx authorization.

You may need to review the requests for information (RFIs) on an Rx authorization with the member. You need specific information to use web services to retrieve the RFIs on a member's Rx authorization.

You may need to review the appeals on an Rx authorization with the member. You need specific information to use web services to retrieve the appeals on the member's Rx authorization.

You may need to review the determination on a line item on an Rx authorization. You need specific information to use web services to retrieve the determination on a member's Rx authorization.

You may need to review the diagnosis information on the Rx authorization with the member. You need specific information to use web services to retrieve the diagnosis information on a member's Rx authorization.

After reviewing the diagnoses on the Rx authorization, you may need to update the diagnosis, including adding and removing a diagnosis, on the authorization. You need specific information to update the diagnoses on a member's Rx authorization.

You may need to review the notes on an Rx authorization with the member. You need specific information to use web services to retrieve the notes on a member's Rx authorization.

You may need to create a note on an Rx authorization after reviewing the authorization with the member. You need specific information to use web services to create a note on a member's Rx authorization.

You may need to review the attachments on an Rx authorization with the member. You need specific information to use web services to retrieve the attachments on a member's Rx authorization.

You may need to create an attachment on an Rx authorization after reviewing the authorization with the member. You need specific information to use web services to create an attachment on a member's Rx authorization.

You may need to review the correspondence notifications on an Rx authorization with the member. You need specific information to use web services to retrieve the correspondence notifications on a member's authorization.

You may need to review the phone notifications on an Rx authorization. You need specific information to use web services to retrieve the phone notifications on a member's Rx authorization.

You may need to review the line items on an Rx authorization with the member. You need specific information to use web services to retrieve the line items on a member's Rx authorization.

Get line item reviews on an Rx authorization [260] on page 339

You may need to review the specific outcome of the reviews on an Rx authorization's line items with the member. You need specific information to use web services to retrieve the line item reviews on a member's Rx authorization.

Create an Rx line item on an Rx authorization [261] on page 339

After reviewing the line items on an Rx authorization with the member, you may need to create a line item on an Rx authorization. You need specific information to use web services to create an Rx line item on a member's Rx authorization.

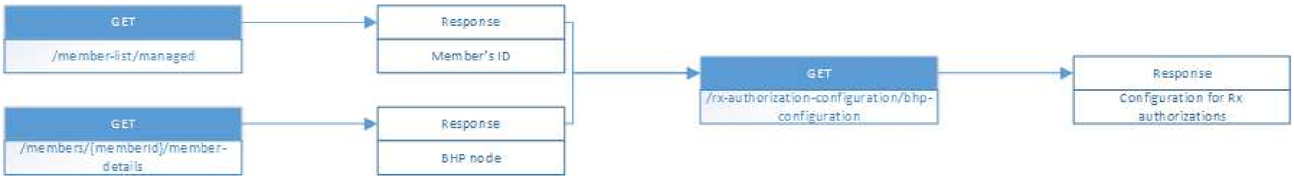
Get the BHP configuration for Rx authorizations

You can get a member's BHP configuration for Rx authorizations using web services. You need specific information to use the web service to retrieve the BHP configuration for Rx authorizations.

To get the BHP configuration, you need the following information:

- Member's ID
- BHP node

The following graphic shows how to use web services to retrieve the BHP configuration for Rx authorizations.



1. Retrieve the member's ID.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/member-details web service to retrieve the member's BHP node.
4. Store the member's BHP node.
5. Use the member's BHP node and the GET /rx-authorization-configuration/bhp-configuration web service to retrieve the configuration for Rx authorizations for the member's BHP node.

Create an Rx authorization

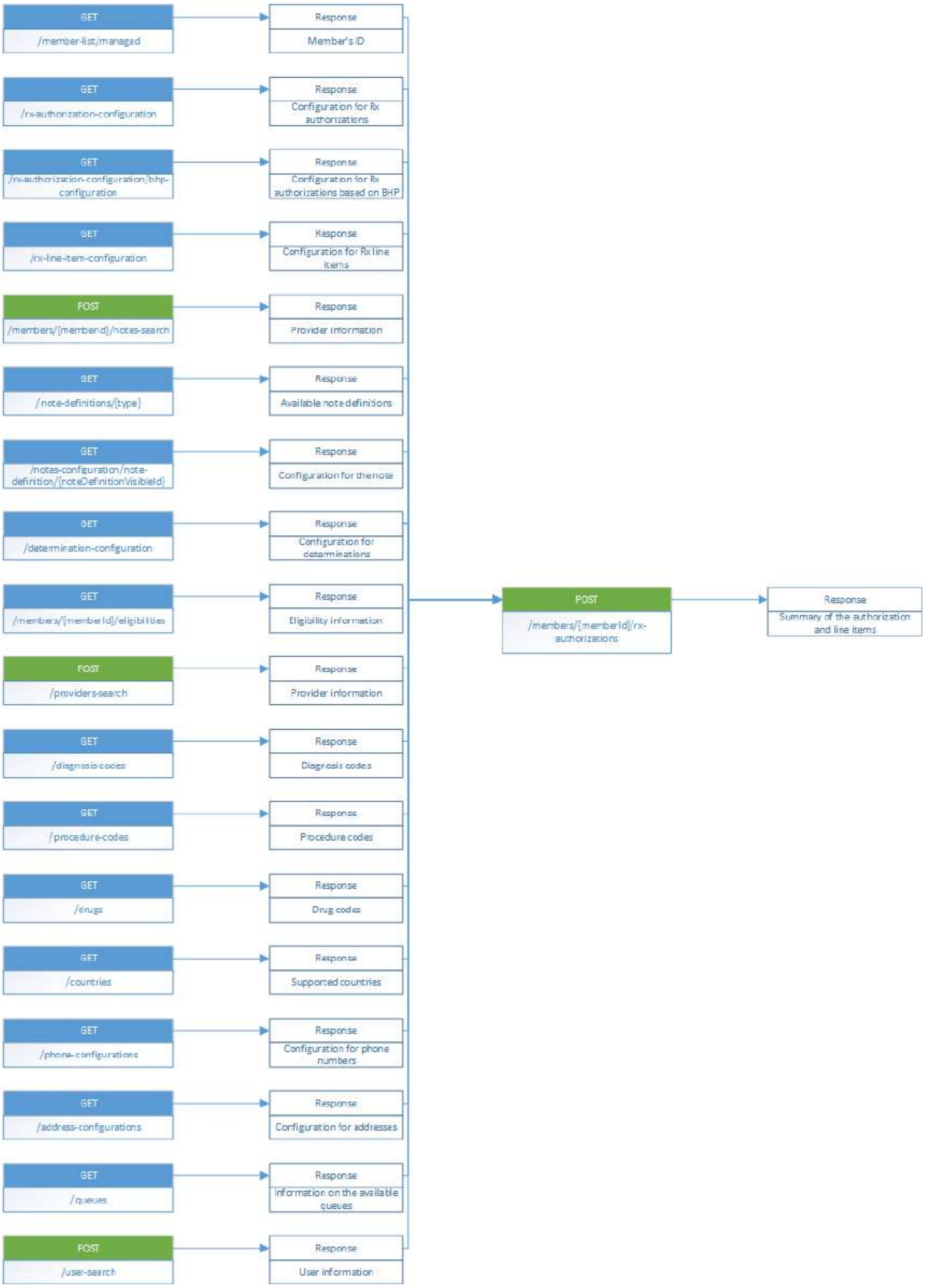
After meeting with a member, you may need to create an Rx authorization. You need specific information to use web services to create an Rx authorization.

To create an Rx authorization, you need the following information:

- Member ID
- Configuration for Rx authorizations
- Configuration for Rx line items
- Available note definitions and configurations (optional)
- Member's eligibility information
- Provider information
- Diagnosis information
- Procedure code information
- Medication information

- Information on the supported countries (optional)
- Configuration for phone numbers (optional)
- Configuration for addresses (optional)
- Available queues or users (optional)

The following graphic shows how to use web services to create an Rx authorization for a member.



1. Retrieve the member ID to be used to retrieve the authorization and the associated header information.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.

3. Use the GET /rx-authorization-configuration web service and the GET /rx- authorization-configuration/bhp-configuration web service to retrieve the configuration to create an Rx authorization.
4. Use the GET /rx-line-item-configuration web service to retrieve the configuration to create an Rx line item.
5. (Optional) If you need to associate an existing prescreen note to the Rx authorization, use the POST / members/{memberId}/notes-search web service to search for the note.
6. (Optional) If including a note on the authorization, use the GET /note-definitions/{type} web service where the type is AUTH to retrieve the available note definitions, then use the note definition ID and the GET /notes-configuration/note-definition/{noteDefinitionVisibleId} web service to retrieve the configuration to create the note.
7. (Optional) If you are including determination information on the line item, use the GET / determination-configuration web service to retrieve the configuration to determine a line item.
8. Use the GET /members/{memberId}/eligibilities web service to retrieve the member's eligibility information.
9. Search for the provider you want to use on the authorization. Refer to Search for a provider [231] on page 301 for more information.
10. Use the GET /diagnosis-codes web service to retrieve the diagnosis you want to use on the authorization.
11. Use the GET /procedure-codes web service to get the procedure information you want to use on the authorization.
12. (Optional) If including medication information, use GET /drugs web service to retrieve the medication's information.
13. (Optional) If including international addresses or international phone numbers, use the GET /countries

    web service to retrieve the information on supported countries.
14. (Optional) If including addresses, use the GET /address-configurations web service and the country information, if applicable, to get the configuration for addresses.
15. (Optional) If including phone numbers or fax numbers, use the GET /phone-configurations web service and the country information, if applicable, to get the configuration for phone numbers and fax numbers.
16. (Optional) If assigning the task to a different user or queue, use the POST /user-search web service or the GET /queues web service to find information on the assignee.

    Refer to Search for a user [297] on page 387 and Get information on the available queues [233] on page 304 for more information on how to use the web services.
17. Use the member ID, the information for the authorization, and the POST /members/{memberId}/rx- authorizations web service to create the Rx authorization for the member.

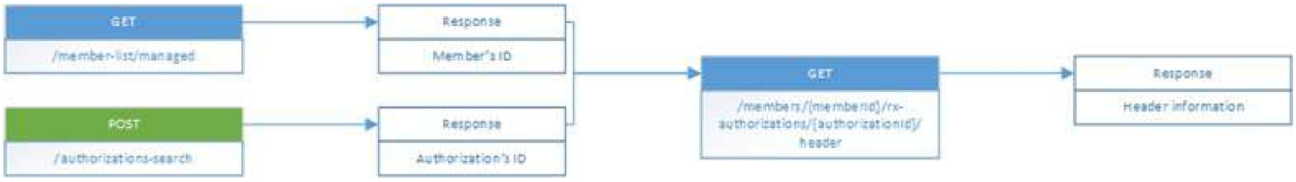
Get the header information on an Rx authorization

You may need to review the header information on an Rx authorization with the member. You need specific information to use web services to retrieve the header information on a member's Rx authorization.

To get the header information, you need the following information:

- Member ID
- Rx authorization ID

The following graphic shows how to use web services to retrieve the header information on a member's Rx authorization.



1. Retrieve the member ID to be used to retrieve the authorization and the associated header information.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the Rx authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/rx-authorizations/{authorizationId}/header web service to get the header information on the Rx authorization.

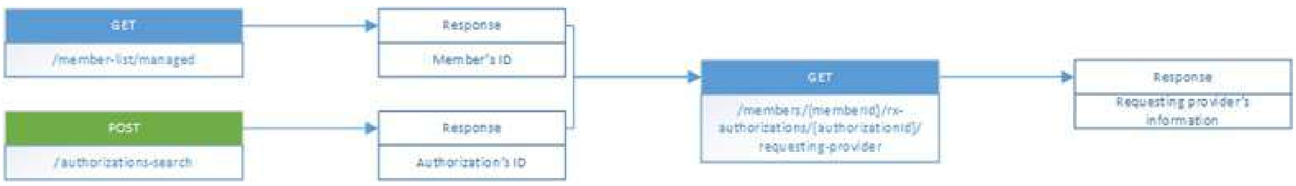
Get the requesting provider on an Rx authorization

You may need to review the requesting provider on the Rx authorization with the member. You need specific information to retrieve the requesting provider on a member's Rx authorization.

To retrieve the requesting provider, you need the following information:

- Member Id
- Rx authorization ID

The following graphic shows how to use web services to retrieve the requesting provider on a member's Rx authorization.



1. Retrieve the member ID to be used to retrieve the authorization and the requesting provider.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the Rx authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the Rx authorization ID, and the GET /members/{memberId}/rx-authorizations/{authorizationId}/requesting-provider web service to retrieve the requesting provider on a member's Rx authorization.

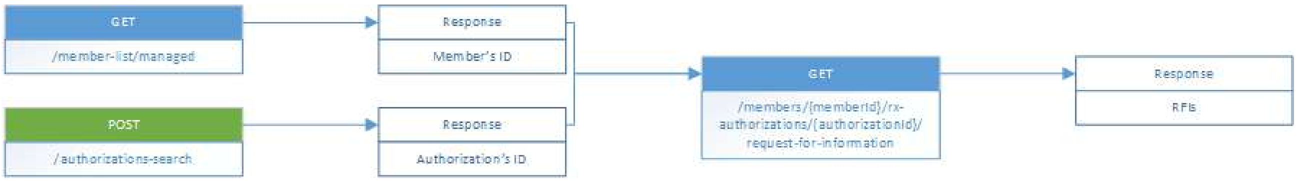
Get the RFIs on an Rx authorization

You may need to review the requests for information (RFIs) on an Rx authorization with the member. You need specific information to use web services to retrieve the RFIs on a member's Rx authorization.

To get the RFIs on an Rx authorization, you need the following information:

- Member ID
- Rx authorization ID

The following graphic shows how to use web services to retrieve the RFIs on a member's Rx authorization.



1. Retrieve the member ID to be used to retrieve the authorization and the associated determination information.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the Rx authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/rx-authorizations/{authorizationId}/request-for-information web service to retrieve the RFIs on the member's Rx authorization.

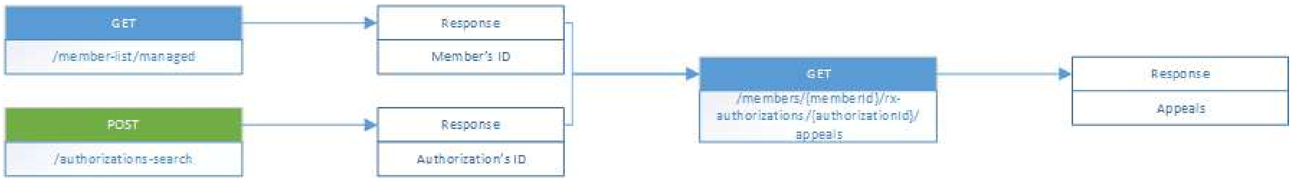
Get the appeals on an Rx authorization

You may need to review the appeals on an Rx authorization with the member. You need specific information to use web services to retrieve the appeals on the member's Rx authorization.

To retrieve the appeals on an Rx authorization, you need the following information:

- Member ID
- Rx authorization ID

The following graphic shows how to use web services to retrieve the appeals on a member's Rx authorization.



1. Retrieve the member ID to retrieve the authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the Rx authorization that has the appeal information.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/rx-authorizations/{authorizationId}/appeals web service to retrieve the appeals on the member's Rx authorization.

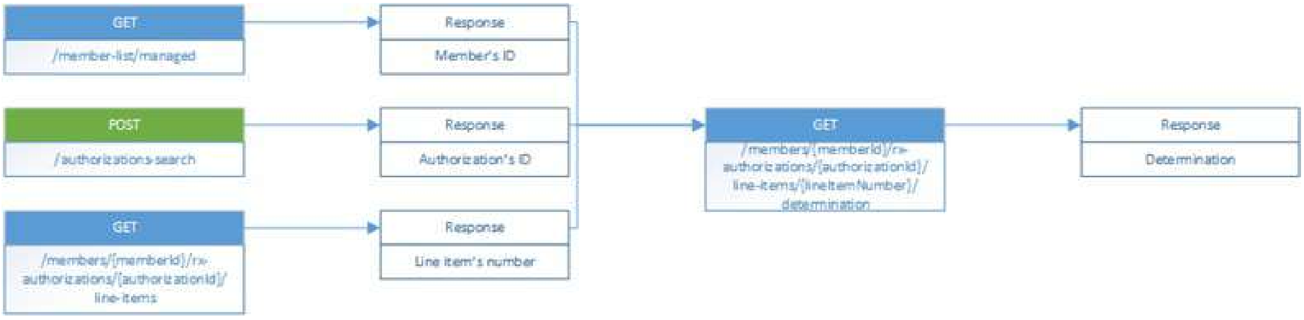
Get the determination on an Rx authorization

You may need to review the determination on a line item on an Rx authorization. You need specific information to use web services to retrieve the determination on a member's Rx authorization.

To get the determination on an Rx authorization, you need the following information:

- Member ID
- Rx authorization
- Line item number

The following graphic shows how to use web services to retrieve the determination on a member's Rx authorization.



1. Retrieve the member ID to be used to retrieve the authorization and the associated determination information.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the Rx authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/rx-authorizations/{authorizationId}/line-items web service to retrieve a summary of the line items on the Rx authorization.
6. Store the number of the line item.
7. Use the member ID, the authorization ID, the line item number, and the GET /members/{memberId}/ rx-authorizations/{authorizationId}/line-items/{lineItemNumber}/determination web service to retrieve the determination on the Rx authorization's line item.

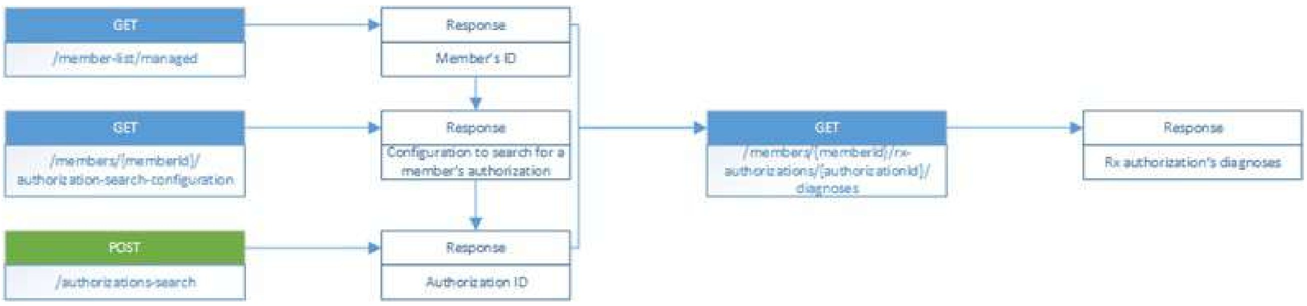
Get the diagnosis information on an Rx authorization

You may need to review the diagnosis information on the Rx authorization with the member. You need specific information to use web services to retrieve the diagnosis information on a member's Rx authorization.

To retrieve the diagnosis information, you need the following information:

- Member ID
- Authorization ID

The following graphic shows how to use web services to retrieve the diagnosis information on a member's Rx authorization.



1. Retrieve the member ID to be used to retrieve the diagnosis information.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information on searching for an authorization.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/rx-authorizations/{authorizationId}/diagnoses web service to retrieve the diagnosis information on the Rx authorization.

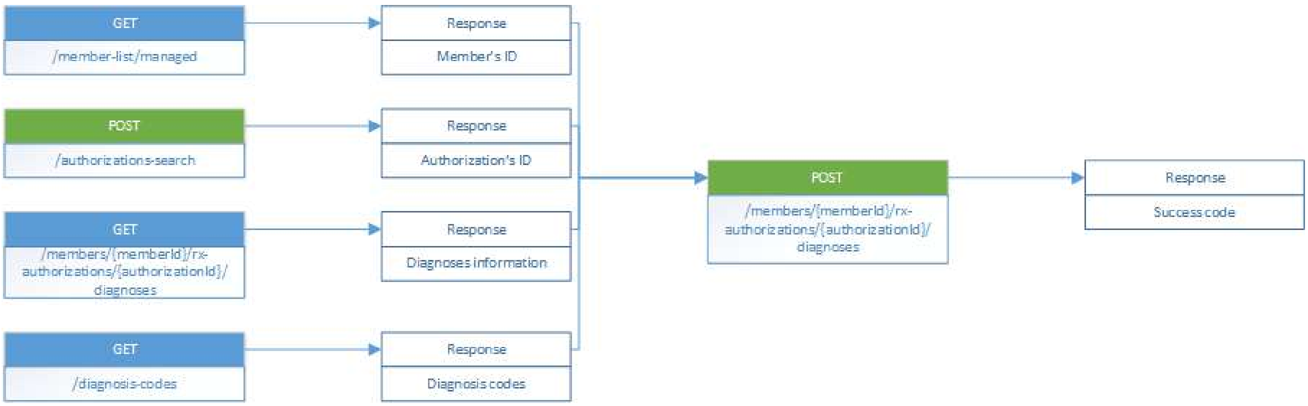
Update the diagnosis information on an Rx authorization

After reviewing the diagnoses on the Rx authorization, you may need to update the diagnosis, including adding and removing a diagnosis, on the authorization. You need specific information to update the diagnoses on a member's Rx authorization.

To update the diagnoses, you need the following information:

- Member ID
- Rx authorization ID
- Existing diagnoses information
- Diagnosis codes

The following graphic shows how to use web services to update the diagnoses on a member's Rx authorization.



1. Retrieve the member ID to retrieve the Rx authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the Rx authorization you want to update.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the member ID, the Rx authorization ID, and the GET /members/{memberId}/rx-authorizations/{authorizationId}/diagnoses web service to retrieve the diagnosis information on the Rx authorization.
6. (Optional) If adding a diagnosis, use the GET /diagnosis-codes web service to retrieve the diagnosis information to add to the authorization.

7. Use the member ID, the Rx authorization, the diagnosis information if adding a diagnosis, and the POST /members/{memberId}/rx-authorizations/{authorizationId}/diagnoses web service to update the diagnoses information on the member's Rx authorization.

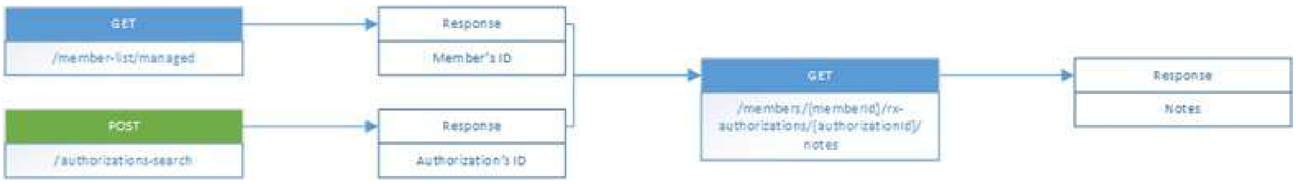
Get the notes on an Rx authorization

You may need to review the notes on an Rx authorization with the member. You need specific information to use web services to retrieve the notes on a member's Rx authorization.

To get the notes, you need the following information:

- Member ID
- Rx authorization ID

The following graphic shows how to use web services to retrieve the notes on a member's Rx authorization.



1. Retrieve the member ID to be used to retrieve the information on the authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the Rx authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member's ID, the authorization ID, and the GET /members/{memberId}/rx-authorizations/{authorizationId}/notes web service to retrieve the notes on the Rx authorization.

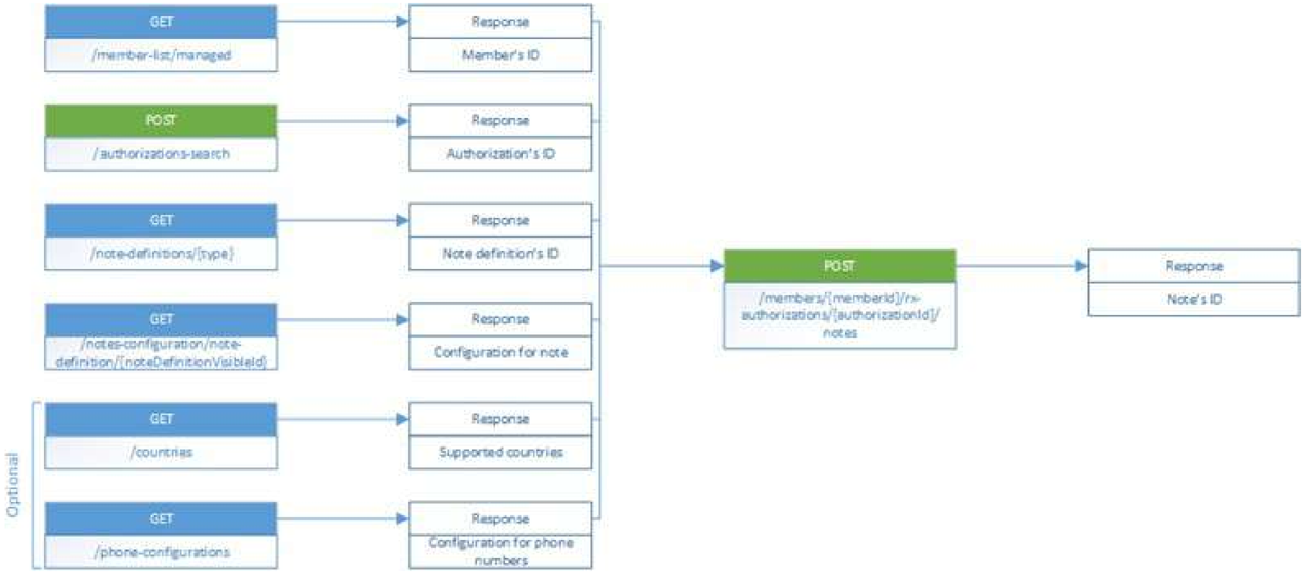
Create a note on an Rx authorization

You may need to create a note on an Rx authorization after reviewing the authorization with the member. You need specific information to use web services to create a note on a member's Rx authorization.

To create a note, you need the following information:

- Member ID
- Rx authorization ID
- Definition of the note
- Configuration to create the note
- Information on the supported countries (optional)
- Configuration to create a phone number (optional)

The following graphic shows how to use web services to create a note on a member's Rx authorization.



1. Retrieve the member ID to be used to retrieve the authorization ID and to create the note.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the Rx authorization you want to update.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the GET /note-definitions/{type} web service to get the definition of the note you want to create on the authorization.
6. Store the ID of the note you want to create.
7. Use the ID of the note and the GET /notes-configuration/note-definition/{note DefinitionVisibleId} web service to get the configuration to create the note.
8. (Optional) If including an international phone number on the note, use the GET /countries web service to get the information on the supported countries.
9. (Optional) If including a phone number on the note, use the GET /phone-configurations web service and the country information, if applicable, to get the configuration to create a phone number.
10. Use the member ID, the authorization ID, the note information, and the POST /members/{member Id}/rx-authorizations/{authorizationId}/notes web service to create a note on an Rx authorization.

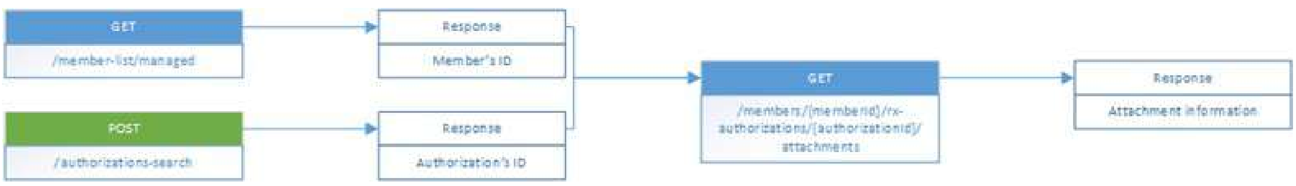
Get the attachments on an Rx authorization

You may need to review the attachments on an Rx authorization with the member. You need specific information to use web services to retrieve the attachments on a member's Rx authorization.

To get the attachments, you need the following information:

- Member ID
- Rx authorization ID

The following graphic shows how to use web services to retrieve the attachments on a member's Rx authorization.



1. Retrieve the member ID to be used to retrieve the authorization and the associated attachments.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the IP authorization you want to review.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/rx-authorizations/{authorizationId}/attachments web service to get the attachments on an Rx authorization.

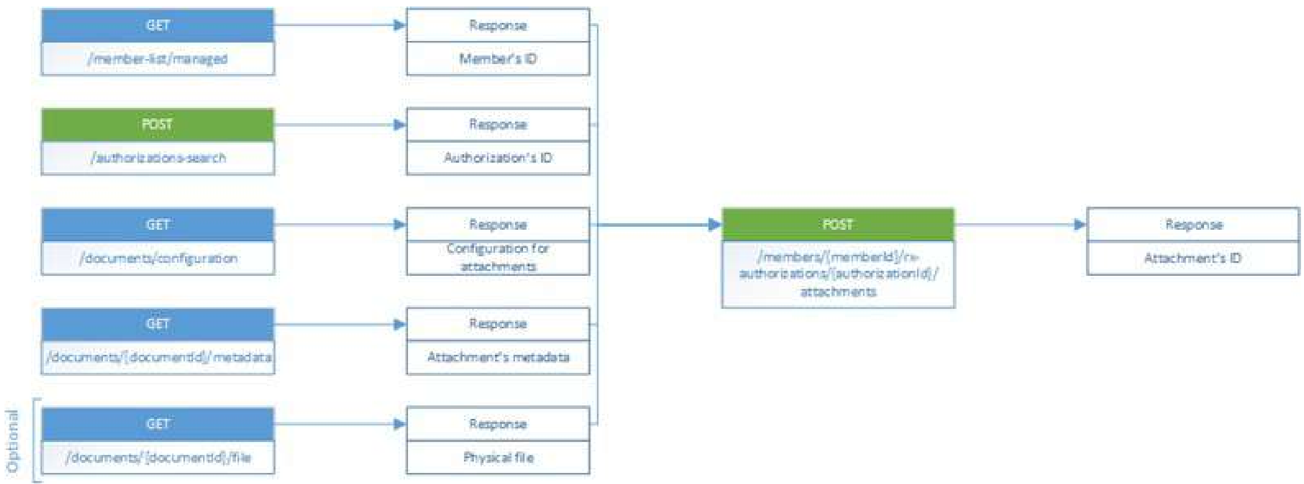
Create an attachment on an Rx authorization

You may need to create an attachment on an Rx authorization after reviewing the authorization with the member. You need specific information to use web services to create an attachment on a member's Rx authorization.

To create an attachment, you need the following information:

- Member ID
- Rx authorization ID
- Configuration to create an attachment
- Metadata for the attachment
- File for the attachment (optional)

The following graphic shows how to use the web services to create an attachment on a member's Rx authorization.



1. Retrieve the member ID to be used to retrieve and update the IP authorization.

   Refer to Search for a member [168] on page 221 or Get a managed members list [166] on page 219 for more information.
2. Store the member ID.
3. Search for the Rx authorization you want to update.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the GET /documents/configuration web service to get the configuration to create an attachment.
6. Use the GET /documents/{documentId}/metadata web service to get the metadata for the attachment.

7. (Optional) If attaching a physical file (instead of a URL) to the Rx authorization, use the GET / documents/{documentId}/file web service to retrieve the physical file.
8. Use the member ID, the authorization ID, the information for the attachment (the metadata and the file, if applicable), and the POST /members/{memberId}/rx-authorizations/{authorizationId}/ attachments web service to create an attachment on an Rx authorization.

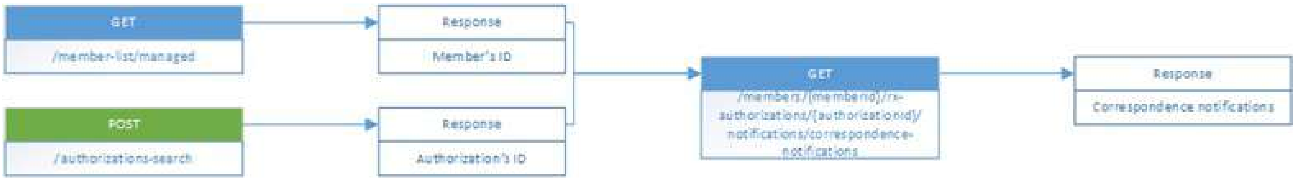
Get the correspondence notifications on an Rx authorization

You may need to review the correspondence notifications on an Rx authorization with the member. You need specific information to use web services to retrieve the correspondence notifications on a member's authorization.

To retrieve the correspondence notifications, you need the following information:

- Member ID
- Rx authorization ID

The following graphic shows how to use web services to retrieve the correspondence notifications on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve the authorization and the associated correspondence notification.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the Rx authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/rx-authorizations/{authorizationId}/notifications/correspondence-notifications web service to get the correspondence notifications on the Rx authorization.

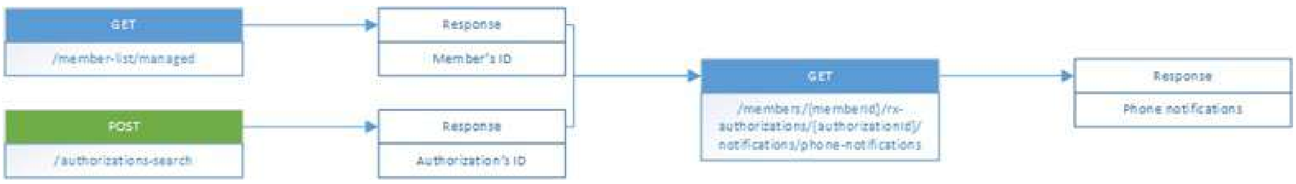
Get the phone notifications on an Rx authorization

You may need to review the phone notifications on an Rx authorization. You need specific information to use web services to retrieve the phone notifications on a member's Rx authorization.

To retrieve the phone notifications, you need the following information:

- Member ID
- Rx authorization ID

The following graphic shows how to use web services to retrieve the phone notifications on a member's Rx authorization.



1. Retrieve the member ID to be used to retrieve the authorization and the associated phone notifications.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the Rx authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/rx-authorizations/{authorizationId}/notifications/phone-notifications web service to get the phone notifications on the Rx authorization.

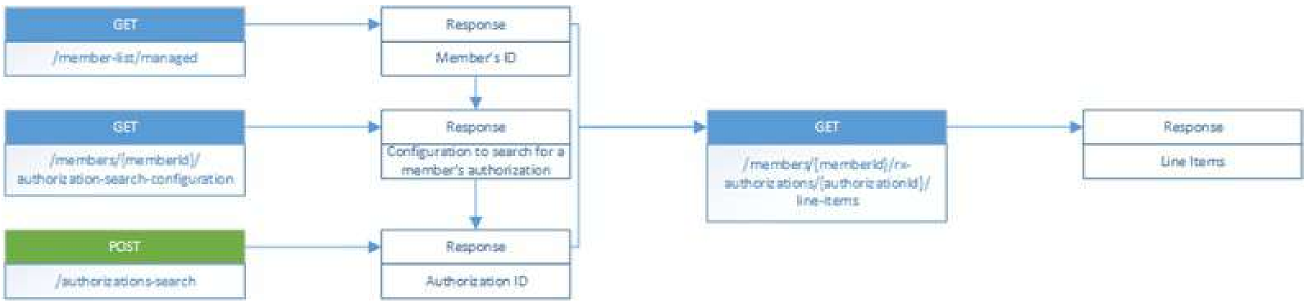
Get the line items on an Rx authorization

You may need to review the line items on an Rx authorization with the member. You need specific information to use web services to retrieve the line items on a member's Rx authorization.

To retrieve the line items, you need the following information:

- Member ID
- Rx authorization ID

The following graphic shows how to use web services to retrieve the line items on a member's Rx authorization.



1. Retrieve the member ID to be used to retrieve the authorization and the associated line items.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the Rx authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/rx-authorizations/{authorizationId}/line-items web service to retrieve the line items on a member's Rx authorization.

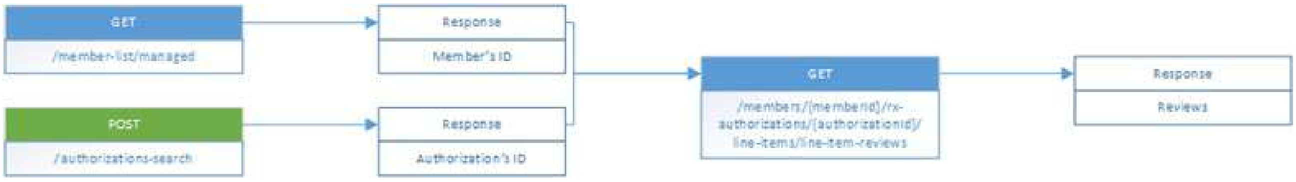
Get line item reviews on an Rx authorization

You may need to review the specific outcome of the reviews on an Rx authorization's line items with the member. You need specific information to use web services to retrieve the line item reviews on a member's Rx authorization.

To retrieve the reviews, you need the following information:

- Member ID
- Rx authorization ID

The following graphic shows how to use web services to retrieve the line item reviews on a member's Rx authorization.



1. Retrieve the member ID to be used to retrieve the authorization and the associated reviews.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the Rx authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. use the member ID, the authorization ID, and the GET /members/{memberId}/rx-authorizations/{authorizationId}/line-items/line-item-reviews web service to retrieve the line items' reviews on the Rx authorization.

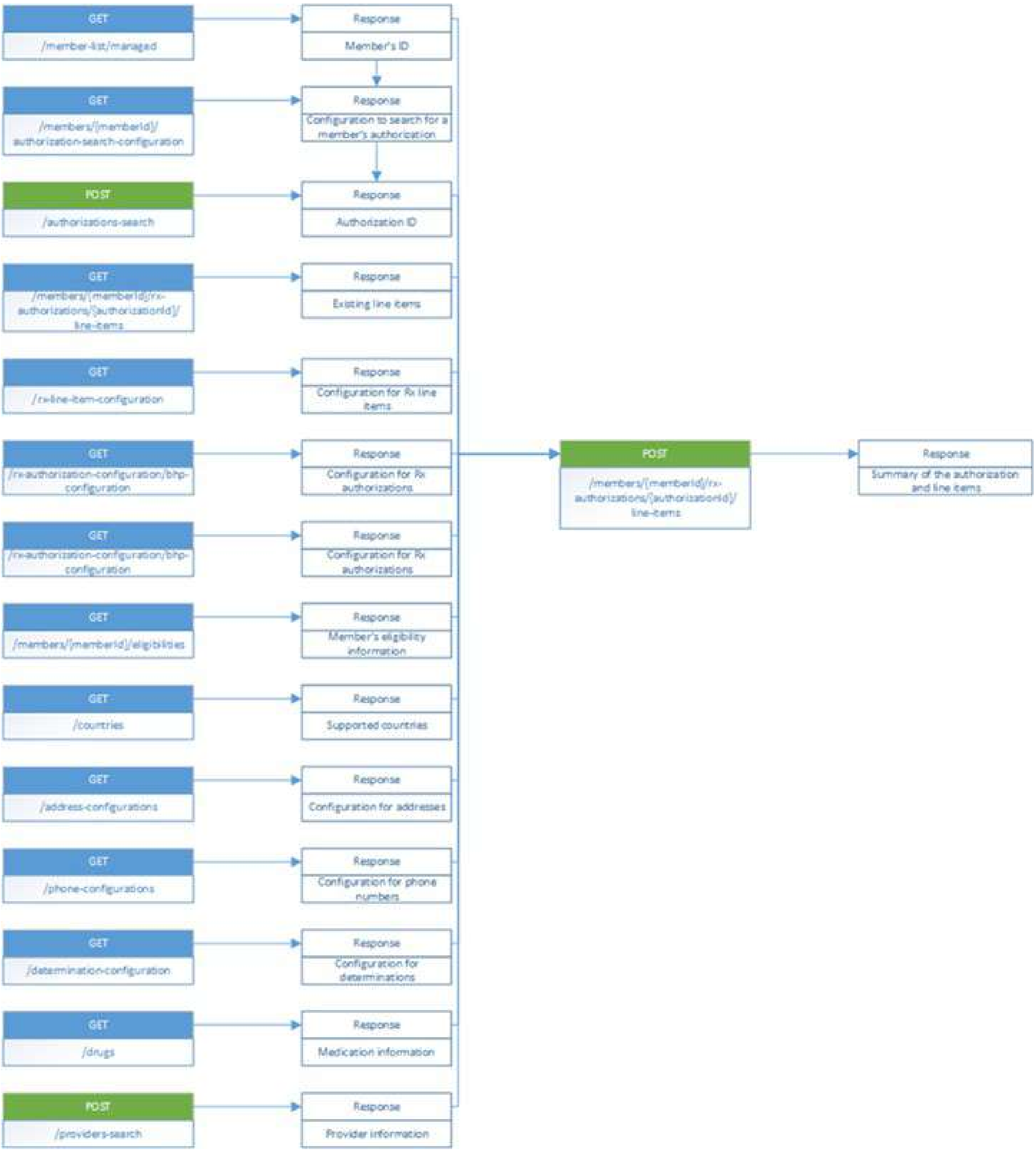
Create an Rx line item on an Rx authorization

After reviewing the line items on an Rx authorization with the member, you may need to create a line item on an Rx authorization. You need specific information to use web services to create an Rx line item on a member's Rx authorization.

To create an Rx line item, you need the following information:

- Member ID
- Rx authorization ID
- Configuration to update an Rx authorization
- Configuration to create an Rx line item
- Member's eligibility information
- Information on the supported countries (optional)
- Configuration for addresses (optional)
- Configuration for phone numbers (optional)
- Configuration for determinations (optional)
- Information on medications (optional)
- Provider information (optional)

The following graphic shows how to use web services to create an Rx line item on a member's Rx authorization.



1. Retrieve the member ID to be used to retrieve the authorization and create an Rx line item.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the Rx authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/rx-authorizations/{authorizationId}/line-items web service to retrieve the most up-to-date version of the authorization and its line items.
6. Use the GET /rx-line-item-configuration web service to retrieve the configuration to create an Rx line item.

7. Use the GET /rx-authorization-configuration/bhp-configuration web service and the GET /rx-authorization-configuration web service to retrieve the configuration for Rx authorizations.
8. Use the member ID and the GET /members/{memberId}/eligibilities web service to retrieve the member's eligibility information.
9. (Optional) If creating an international address or phone number, use the GET /countries web service to retrieve information on the supported countries.
10. (Optional) If creating an address, use the GET /address-configurations web service and the country information, if applicable, to retrieve the configuration to create an address.
11. (Optional) If creating a phone number or fax number, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration to create a phone number or fax number.
12. (Optional) If including determination information on the line item, use the GET / determination- configuration web service to retrieve the configuration to create the determination on the line item.
13. (Optional) If including medication information on the line item, use the GET /drugs web service to retrieve the medication information.
14. (Optional) If including a provider on the line item, search for the appropriate provider to use on the line item.

    Refer to Search for a provider [231] on page 301 for more information.
15. Use the member ID, the authorization ID, the line item information, and the POST / members/{member Id}/rx-authorizations/{authorizationId}/line-items web service to create an Rx line item on an Rx authorization.

Service/procedure (SP) authorizations

You can use web services to interact with a member's service/procedure (SP) authorizations.

The following sections describe how to use web services to interact with a member's SP authorizations. For example, you can use web services to create an SP authorization, create a line item, and update a line item.

Topics in this section

After meeting with a member, you may need to create an SP authorization. You need specific information to use web services to create an SP authorization.

You may need to review the authorizations linked to the SP authorization with the member. You need specific information to use the web services to retrieve the linked authorizations.

You may need to review the correspondence notifications on an SP authorization with the member. You need specific information to use web services to retrieve the correspondence notifications on a member's SP authorization.

You may need to review the phone notifications on the SP authorization with the member. You need specific information to use web services to retrieve the phone notifications on the member's SP authorization.

You may need to review the RFIs on a SP authorization with the member. You need specific information to use web services to retrieve the RFIs on the member's SP authorization.

Get the determination on a service/procedure (SP) authorization's line item [269] on page 351

You may need to review the line item's determination with the member. You need specific information to use web services to retrieve the line item's determination on the member's SP authorization.

Get the reviews on a service/procedure (SP) authorization's line items [270] on page 352

You may need to go over the reviews on an SP authorization with the member. You need specific information to use web services to retrieve the reviews on the SP authorization's line items.

Get the appeals on a member's service/procedure (SP) authorization [271] on page 352

You may need to review the appeals on an SP authorization with the member. You need specific information to use web services to retrieve the appeals on the member's SP authorization.

Get the reopenings on a service/procedure (SP) authorization [271] on page 353

You may need to review the reopen information on an SP authorization with the member. You need specific information to use web services to retrieve the reopenings on the member's SP authorizations.

Get the header on a service/procedure (SP) authorization [272] on page 354

You may need to review the header on an SP authorization with the member. You need specific information to use web services to retrieve the header information on a member's SP authorization.

Update the header information on a service/procedure (SP) authorization [272] on page 354

After reviewing the header information on an SP authorization with the member, you may need to update the information. You need specific information to use web services to update the header on a member's SP authorization.

Get the line items on a service/procedure (SP) authorization [273] on page 356

You may need to review the line items on a member's SP authorization. You need specific information to use web services to retrieve the line items on a member's SP authorization.

Create a line item on a service/procedure (SP) authorization [274] on page 356

After reviewing the line items on an SP authorization with the member, you may need to create a line item on an SP authorization. You need specific information to use web services to create an SP line item on a member's SP authorization.

Update a service/procedure (SP) line item on an SP authorization on page 359

After reviewing the line item on an SP authorization with the member, you may need to update the line item. You need specific information to use web services to update an SP line item on the member's SP authorization.

Get the notes on a service/procedure (SP) authorization [278] on page 363

You may need to review the notes on an SP authorization with the member. You need specific information to use web services to retrieve the notes on a member's SP authorization.

Create a note on a service/procedure (SP) authorization [279] on page 363

After reviewing the notes on an SP authorization, you may need to create a note on the authorization. You need specific information to use web services to create a note on the member's SP authorization.

Get the attachments on a service/procedure (SP) authorization [280] on page 365

You may need to review the attachments on an SP authorization with the member. You need specific information to use web services to retrieve the attachments on a member's SP authorization.

Create an attachment on a service/procedure (SP) authorization [280] on page 365

After reviewing or completing an SP authorization with the member, you may need to create an attachment on the authorization. You need specific information to use web services to create an attachment on a member's SP authorization.

Get the requesting provider on a service/procedure (SP) authorization [281] on page 366

You may need to review the requesting provider on the SP authorization with the member. You need specific information to retrieve the requesting provider on a member's SP authorization.

Update the requesting provider on a service/procedure (SP) authorization [282] on page 367

After reviewing the requesting provider on an SP authorization with the member, you may need to update the provider's information. You need specific information to use web services to update the requesting provider on a member's SP authorization.

Get the diagnoses on a service/procedure (SP) authorization [283] on page 368

You may need to review the diagnoses information on a member's SP authorization. You need specific information to use web services to retrieve the diagnoses on the authorization.

Update the diagnoses on a service/procedure (SP) authorization [283] on page 369

After reviewing the diagnoses on the SP authorization, you may need to update the diagnosis, including adding and removing a diagnosis, on the authorization. You need specific information to update the diagnoses on a member's SP authorization.

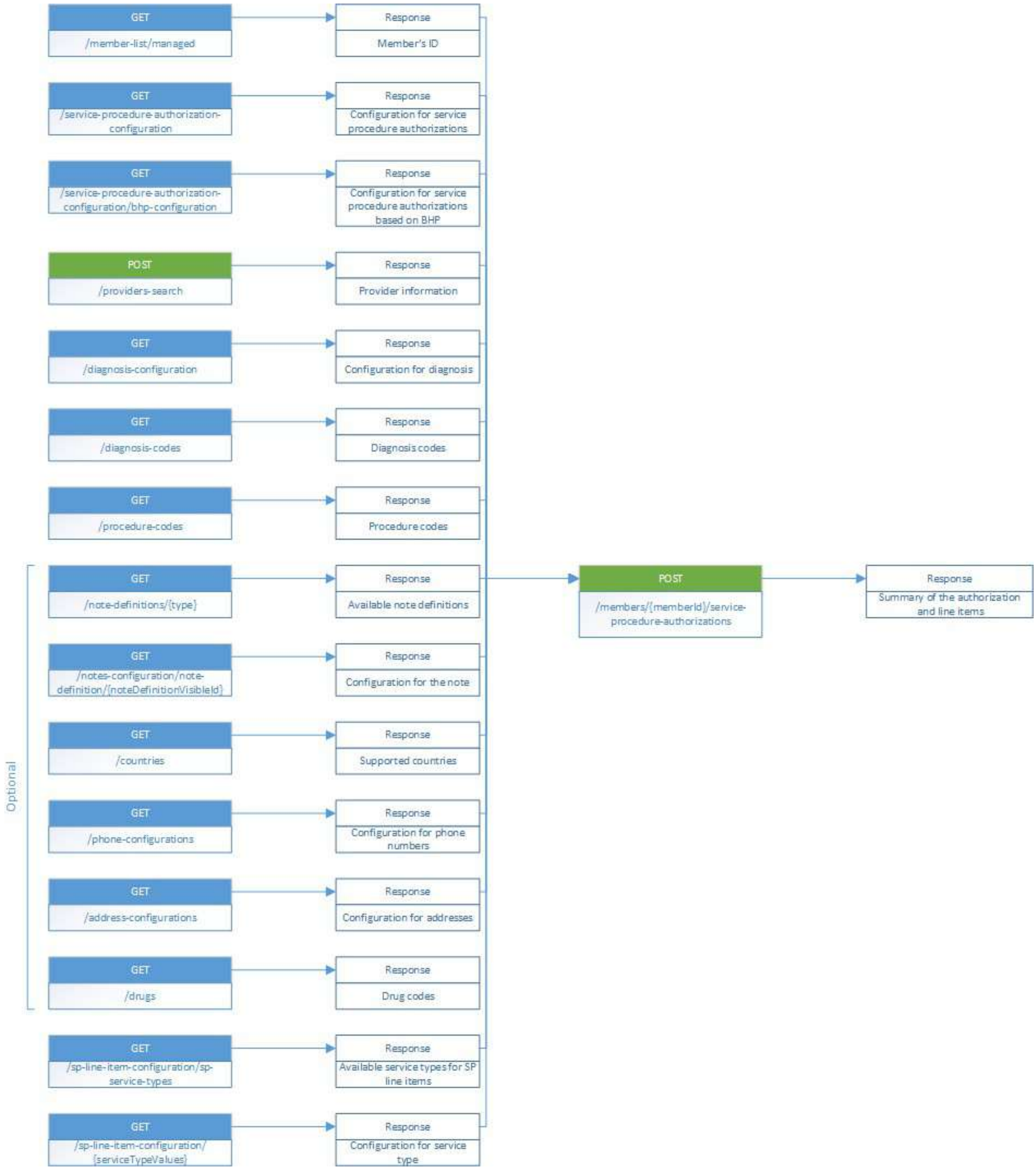
Create a service/procedure (SP) authorization

After meeting with a member, you may need to create an SP authorization. You need specific information to use web services to create an SP authorization.

To create an SP authorization, you need the following information:

- Member ID
- Configuration to create an SP authorization
- Provider's information
- Configuration to add a diagnosis
- Diagnosis codes
- Procedure codes
- Definition of the note you want to create (optional)
- Configuration for the note (optional)
- Information on the supported countries (optional)
- Configuration for addresses (optional)
- Configuration for phone number (optional)
- Medication information (optional)
- Available service types for the SP line item
- Configuration for the service type

The following graphic shows how to use web services to create an SP authorization for a member.



1. Retrieve the member ID to create the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/member-details web service to retrieve the member's BHP node.
4. Store the BHP node.
5. Use the GET /service-procedure-authorization-configuration web service to retrieve the configuration to create an SP authorization.
6. Use the member's BHP node and the GET /service-procedure-authorization- configuration/ bhp-configuration web service to retrieve the configuration for SP authorizations for the member's BHP node.

7. Search for the providers you want to use on the authorization. Refer to Search for a provider [231] on page 301 for more information.
8. Use the GET /diagnosis-configuration web service to get the configuration to add a diagnosis.
9. Use the GET /diagnosis-codes web service to retrieve the diagnosis you want to use on the authorization.
10. Use the GET /procedure-codes web service to get the procedure information you want to use on the authorization.
11. (Optional) If including a note on the authorization, use the GET /note-definitions/{type} web service where the type is AUTH to retrieve the available note definitions, then use the note's definition ID and the GET /notes-configuration/note-definition/{noteDefinitionVisibleId} web service to retrieve the configuration to create the note.
12. (Optional) If including international addresses or international phone numbers, use the GET /countries

    web service to retrieve information on the supported countries.
13. (Optional) If including an address, use the GET /address-configurations web service and the country information, if applicable, to get the configuration for addresses.
14. (Optional) If including phone numbers, use the GET /phone-configurations web service and the country information, if applicable, to get the configuration for phone numbers.
15. (Optional) If including medication information, use the GET /drugs web service to retrieve the medication's information.
16. Use the GET /sp-line-item-configuration/sp-service-types web service to retrieve the service types available for SP line items.
17. Store the service type you want to use on the SP line item.
18. Use the service type and the GET /sp-line-item-configuration/{serviceTypeValue} web service to retrieve the configuration for the service type.
19. Use the member ID, the information for the authorization, and the POST /members/{memberId}/ service-procedure-authorizations web service to create the SP authorization for the member.

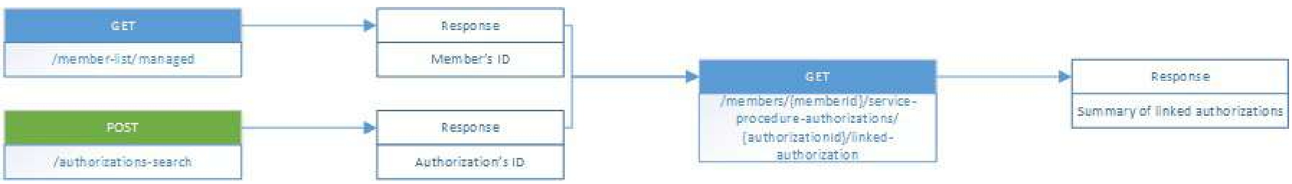
Get the linked authorizations on a service/procedure (SP) authorization

You may need to review the authorizations linked to the SP authorization with the member. You need specific information to use the web services to retrieve the linked authorizations.

To retrieve the linked authorizations, you need the following information:

- Member ID
- SP authorization ID

The following graphic shows how to use web services to retrieve the authorizations linked with a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the SP authorization you want to view.

Refer to Search for a member's authorization [75] on page 101 for more information.

4. Store the authorization ID.
5. Use the member ID, the SP authorization ID, and the GET /members/{memberId}/service-procedure-authorizations/{authorizationId}/linked-authorizations web service to retrieve the linked authorizations.

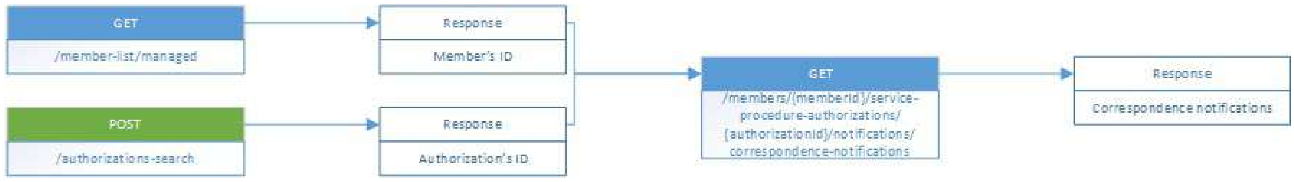
Get the correspondence notifications on a service/ procedure (SP) authorization

You may need to review the correspondence notifications on an SP authorization with the member. You need specific information to use web services to retrieve the correspondence notifications on a member's SP authorization.

To retrieve the correspondence notifications, you need the following information:

- Member ID
- SP authorization ID

The following graphic shows how to use web services to retrieve the correspondence notifications on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the SP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the member ID, the SP authorization ID, and the GET /members/{memberId}/service-procedure-authorizations/{authorizationId}/notifications/correspondence- notifications web service to retrieve the correspondence notifications on the member's SP authorization.

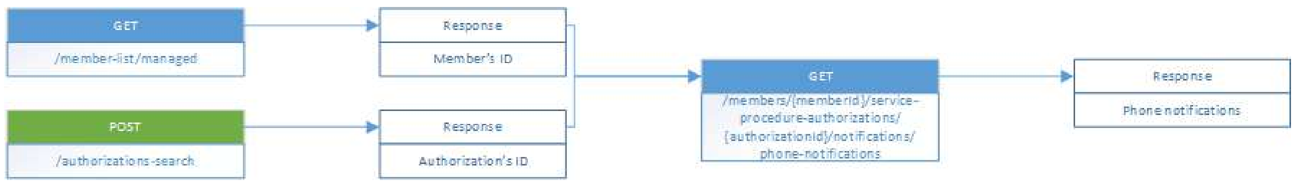
Get the phone notifications on the service/ procedure (SP) authorization

You may need to review the phone notifications on the SP authorization with the member. You need specific information to use web services to retrieve the phone notifications on the member's SP authorization.

To retrieve the phone notifications, you need the following information:

- Member ID
- SP authorization ID

The following graphic shows how to use web services to retrieve the phone notifications on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the SP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/service-procedure-authorizations/{authorizationId}/notifications/phone-notifications web service to retrieve the phone notifications on the member's SP authorization.

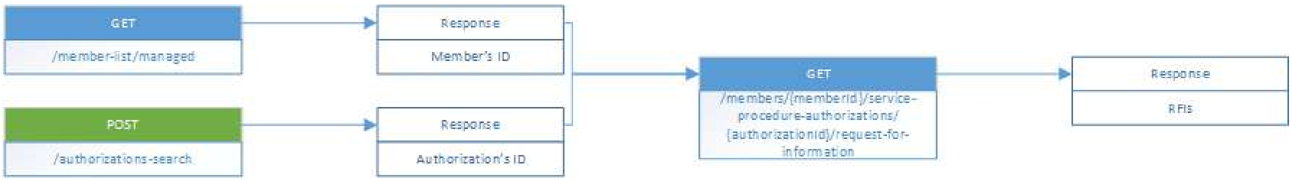
Get the requests for information (RFIs) on a service/ procedure (SP) authorization

You may need to review the RFIs on a SP authorization with the member. You need specific information to use web services to retrieve the RFIs on the member's SP authorization.

To retrieve the RFIs, you need the following information:

- Member ID
- SP authorization ID

The following graphic shows how to use web services to retrieve the RFIs on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the SP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/service-procedure-authorizations/{authorizationId}/request-for-information web service to retrieve the RFIs on the member's SP authorization.

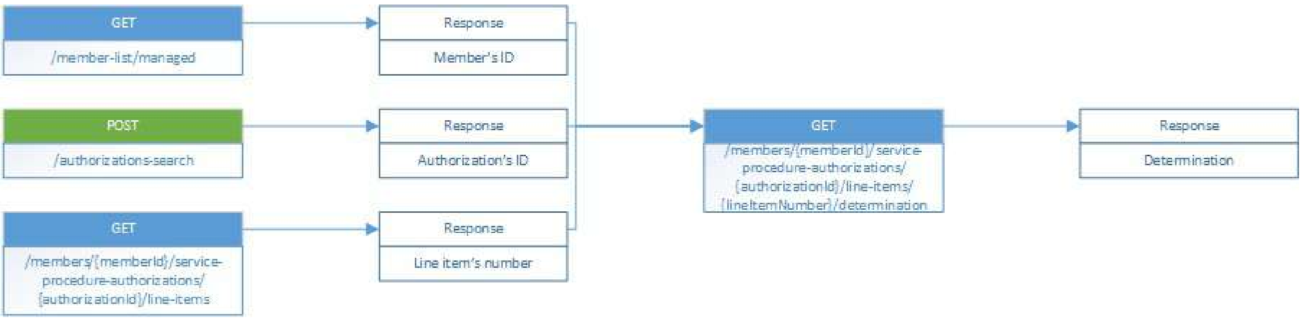
Get the determination on a service/procedure (SP) authorization's line item

You may need to review the line item's determination with the member. You need specific information to use web services to retrieve the line item's determination on the member's SP authorization.

To retrieve the determination, you need the following information:

- Member ID
- SP authorization ID
- Line item number

The following graphic shows how to use web services to retrieve the determination on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the SP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/authorizations/

   {authorizationId} web service to retrieve the details on the member's authorization.
6. Store the number of the line item.
7. Use the member ID, the SP authorization ID, the line item number, and the GET /members/{member Id}/service-procedure-authorizations/{authorizationId}/line-items/{lineItem Number}/determination web service to retrieve the determination on the SP authorization's line item.

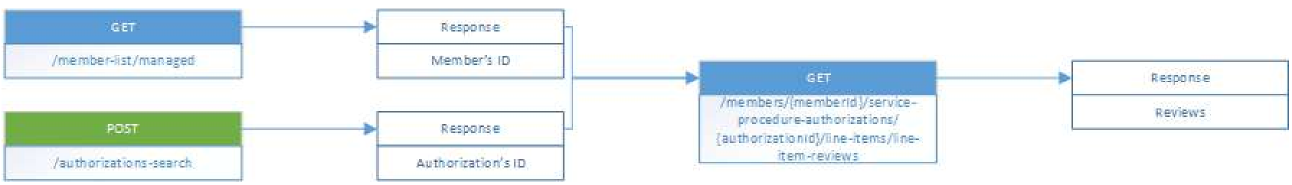
Get the reviews on a service/procedure (SP) authorization's line items

You may need to go over the reviews on an SP authorization with the member. You need specific information to use web services to retrieve the reviews on the SP authorization's line items.

To retrieve the reviews, you need the following information:

- Member ID
- SP authorization ID

The following graphic shows how to use web services to retrieve the line item reviews on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the SP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.

5. Use the member ID, the authorization ID, and the GET /members/{memberId}/service- procedure-authorizations/{authorizationId}/line-items/line-item-reviews web service to retrieve the line items' reviews on the member's SP authorization.

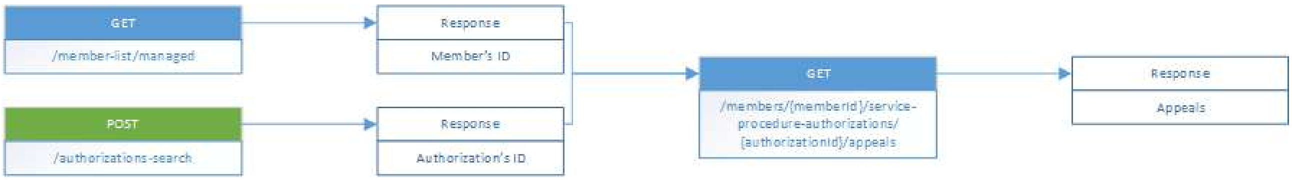
Get the appeals on a member's service/ procedure (SP) authorization

You may need to review the appeals on an SP authorization with the member. You need specific information to use web services to retrieve the appeals on the member's SP authorization.

To retrieve the appeals, you need the following information:

- Member ID
- SP authorization ID

The following graphic shows how to use web services to retrieve the appeals on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the SP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the member ID,the authorization ID, and the GET /members/{memberId}/service-procedure-authorizations/{authorizationId}/appeals web service to retrieve the appeal on the member's SP authorization.

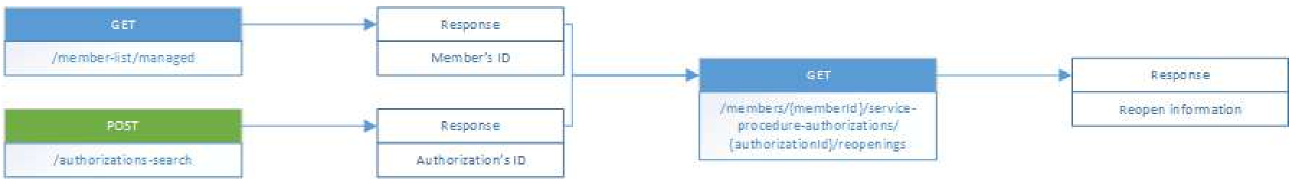
Get the reopenings on a service/procedure (SP) authorization

You may need to review the reopen information on an SP authorization with the member. You need specific information to use web services to retrieve the reopenings on the member's SP authorizations.

To retrieve the reopenings, you need the following information:

- Member ID
- SP authorization ID

The following graphic shows how to use web services to retrieve the reopen information on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.

2. Store the member ID.
3. Search for the SP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/service-procedure-authorizations/{authorizationId}/reopenings web service to retrieve the reopen information on the member's SP authorization.

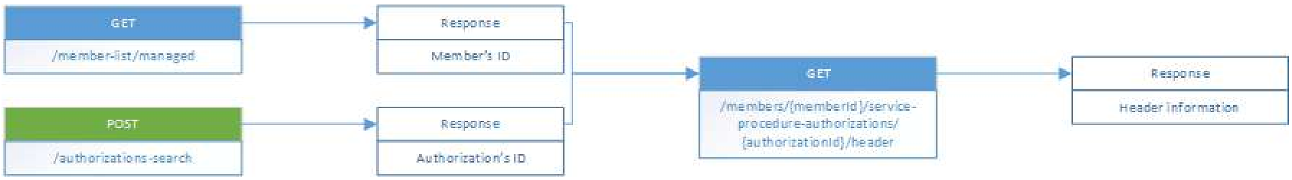
Get the header on a service/procedure (SP) authorization

You may need to review the header on an SP authorization with the member. You need specific information to use web services to retrieve the header information on a member's SP authorization.

To retrieve the header information, you need the following information:

- Member ID
- SP authorization ID

The following graphic shows how to use web services to retrieve the header information on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the SP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/service-procedure-authorizations/{authorizationId}/header web service to retrieve the header information on the member's SP authorization.

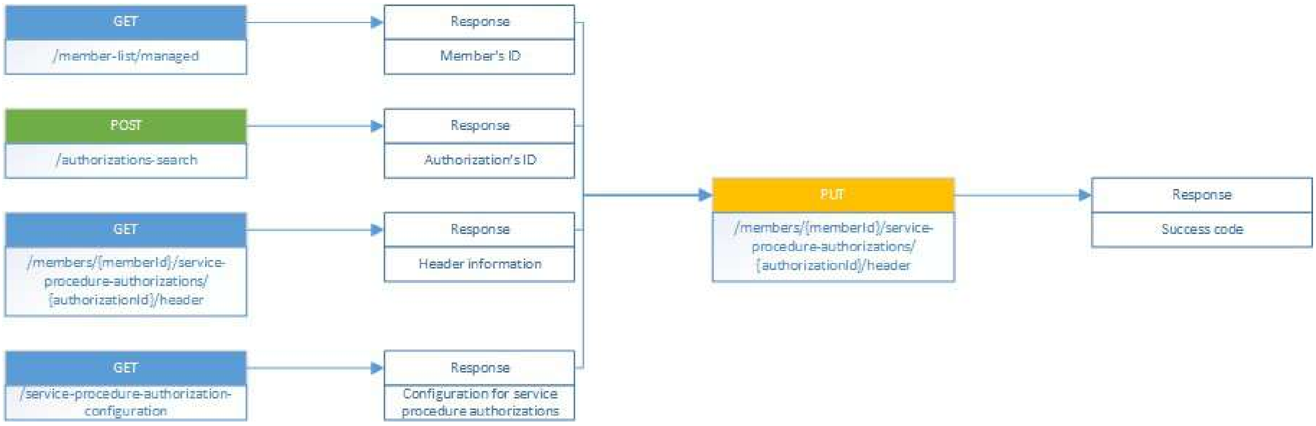
Update the header information on a service/procedure (SP) authorization

After reviewing the header information on an SP authorization with the member, you may need to update the information. You need specific information to use web services to update the header on a member's SP authorization.

To update the header information, you need the following information:

- Member ID
- SP authorization ID
- Existing header information
- Configuration to update an SP authorization

The following graphic shows how to use web services to update the header on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the SP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the member ID, the SP authorization ID, and the GET /members/{memberId}/service-procedure-authorizations/{authorizationId}/header web service to retrieve the current information on the header.
6. Use the GET /service-procedure-authorization-configuration web service to retrieve the configuration to update an SP authorization.
7. Use the member ID, the authorization ID, the updated header information, and the PUT / members/

{memberId}/service-procedure-authorizations/{authorizationId}/header web service to update the header information on the member's SP authorization.

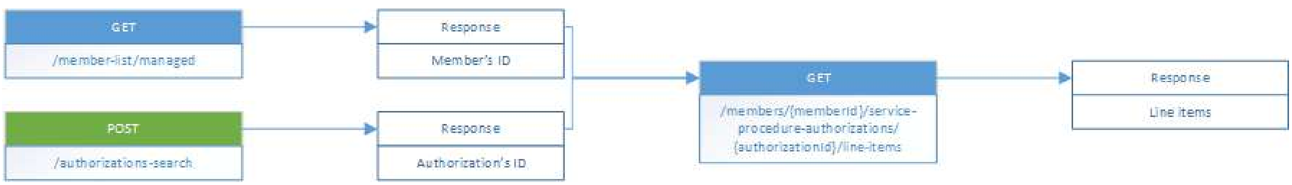
Get the line items on a service/procedure (SP) authorization

You may need to review the line items on a member's SP authorization. You need specific information to use web services to retrieve the line items on a member's SP authorization.

To retrieve the line items, you need the following information:

- Member ID
- SP authorization ID

The following graphic shows how to use web services to retrieve the line items on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the SP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.

4. Store the authorization ID.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/service-procedure-authorizations/{authorizationId}/line-items web service to retrieve the line items on the member's SP authorization.

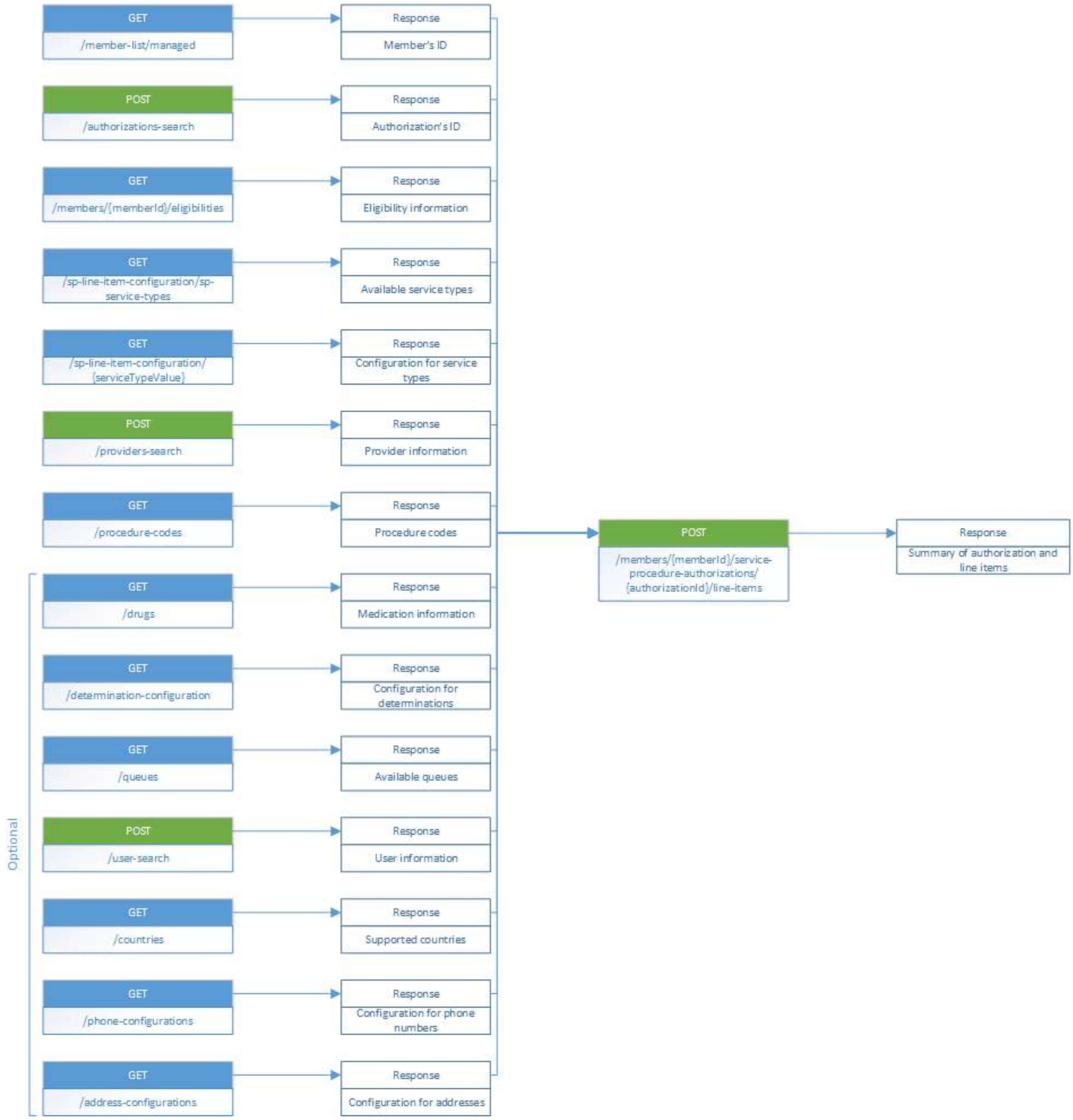
Create a line item on a service/procedure (SP) authorization

After reviewing the line items on an SP authorization with the member, you may need to create a line item on an SP authorization. You need specific information to use web services to create an SP line item on a member's SP authorization.

To create an SP line item, you need the following information:

- Member ID
- SP authorization ID
- Member's eligibility information
- Available service types for a line item
- Configuration for the service type
- Provider information
- Procedure codes
- Drug information (optional)
- Configuration for determinations (optional)
- Assignee for the next task (queue or user) (optional)
- Supported countries (optional)
- Configuration for phone numbers (optional)
- Configuration for addresses (optional)

The following graphic shows how to use web services to create a line item on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.
3. Search for the SP authorization you want to update.

   Refer to Search for a member's authorization [75] for more information.
4. Store the authorization ID.
5. Use the member ID and the GET /members/{memberId}/eligibilities web service to retrieve the member's eligibility information.
6. Use the GET /sp-line-item-configuration/sp-service-types web service to retrieve the available service types.
7. Use the service type for the line item and the GET /sp-line-item-configuration/{serviceType Value} web service to retrieve the configuration to create the line item.
8. Search for the provider you want to use on the line item.

   Refer to Search for a provider [231] for more information.

9. Use the GET /procedure-codes web service to retrieve the procedure information to use on the authorization.
10. (Optional) If including medications on the line item, use the GET /drugs web service to retrieve the appropriate medication information.
11. (Optional) If determining the line item, use the GET /determination-configuration web service to retrieve the configuration to create a determination.
12. (Optional) If including assignee information on the next task to be created, use the GET / queues or

    POST /user-search web service to retrieve the appropriate queue or user, respectively.
13. (Optional) If including international addresses or international phone numbers, use the GET /countries

    web service to retrieve information on the supported countries.
14. (Optional) If including addresses, use the GET /address-configurations web service and the country information, if applicable, to get the configuration for addresses.
15. (Optional) If including phone numbers, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration for phone numbers.
16. Use the member ID, the SP authorization ID, the line item information, and the POST / members/

{memberId}/service-procedure-authorizations/{authorizationId}/line-items web service to create a line item on the member's SP authorization.

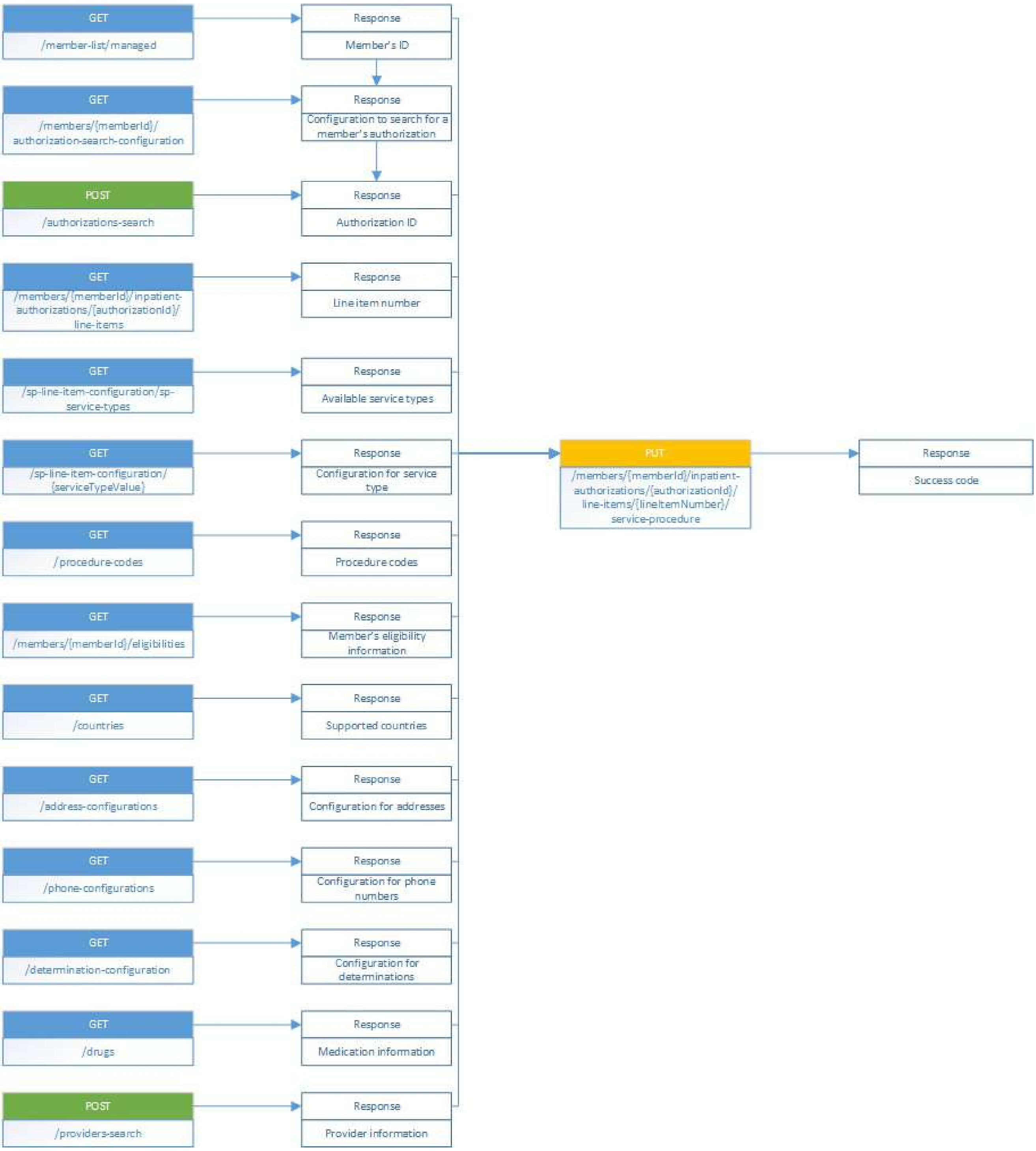
Update a service/procedure (SP) line item on an inpatient (IP) authorization

You may need to update a service/procedure (SP) line item on an inpatient (IP) authorization after reviewing the line item with the member. You need specific information to use web services to update an SP line item on a member's IP authorization.

To update the SP line item, you need the following information:

- Member ID
- IP authorization ID
- Line item number
- Existing information on the SP line item
- Available service types (optional)
- Configuration for the service type
- Procedure code information (optional)
- Member's eligibility information
- Information on the supported countries (optional)
- Configuration to add or update an address (optional)
- Configuration to add or update a phone number (optional)
- Configuration to determine the line item (optional)
- Medication information (optional)
- Provider information (optional)

The following graphic shows how to use web services to update an SP line item on a member's IP authorization.



1. Retrieve the member ID to be used to retrieve and update the authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the authorization you want to update.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the ID of the authorization.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/inpatient-authorizations/{authorizationId}/line-items web service to retrieve the current line items on the IP authorization.
6. Store the number of the line item you want to update.

7. (Optional) To change the service type one the line item, use the GET /sp-line-item-configuration/sp-service-types web service to retrieve information on the available service types.
8. (Optional) To update values for the existing service type or to retrieve the configuration for an updated service type, use the GET /sp-line-item-configuration/{serviceTypeValue} web service to retrieve the configuration for the provided service type.
9. (Optional) If updating the procedure information on the line item, use the GET /procedure-codes web service to retrieve the appropriate procedure information.
10. Use the member ID and the GET /members/{memberId}/eligibilities web service to retrieve the member's eligibility information.
11. (Optional) If adding or updating international addresses or phone numbers, use the GET / countries

    web service to retrieve information on the supported countries.
12. (Optional) If adding or updating an address, use the GET /address-configurations web service and the country information, if applicable, to retrieve the configuration to add or update an address.
13. (Optional) If adding or updating a phone number, use the GET /phone-configurations web service and the country information, if applicable, to retrieve the configuration to add or update a phone number.
14. (Optional) If including or updating the determination information on the line item, use the GET / determination-configuration web service to retrieve the configuration for determining line items.
15. (Optional) If including medications on the line item, use the GET /drugs web service to retrieve the appropriate medication information.
16. (Optional) If updating the provider or facility, search for the appropriate provider. Refer to Search for a provider [231] on page 301 for more information.
17. Use the member ID, the authorization ID, the line item number, the updated line item number, and the PUT /members/{memberId}/inpatient-authorizations/{authorizationId}/line-items/{lineItemNumber}/service-procedure web service to update the SP line item on the IP authorization.

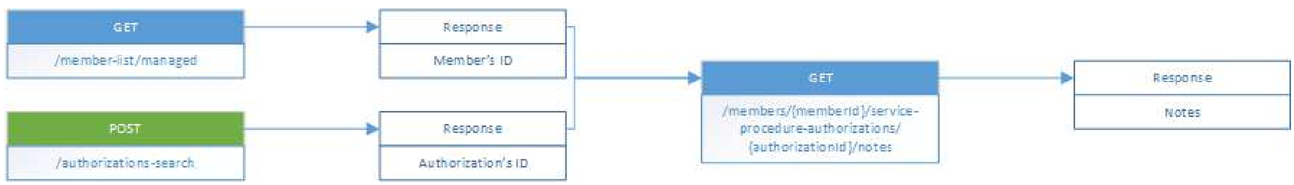
Get the notes on a service/procedure (SP) authorization

You may need to review the notes on an SP authorization with the member. You need specific information to use web services to retrieve the notes on a member's SP authorization.

To retrieve the notes on an SP authorization, you need the following information:

- Member ID
- SP authorization ID

The following graphic shows how to use web services to retrieve the notes on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.

3. Search for the SP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the members ID, the authorization ID, and the GET /members/{memberId}/service-procedure-authorizations/{authorizationId}/notes web service to retrieve the notes on the member's SP authorization.

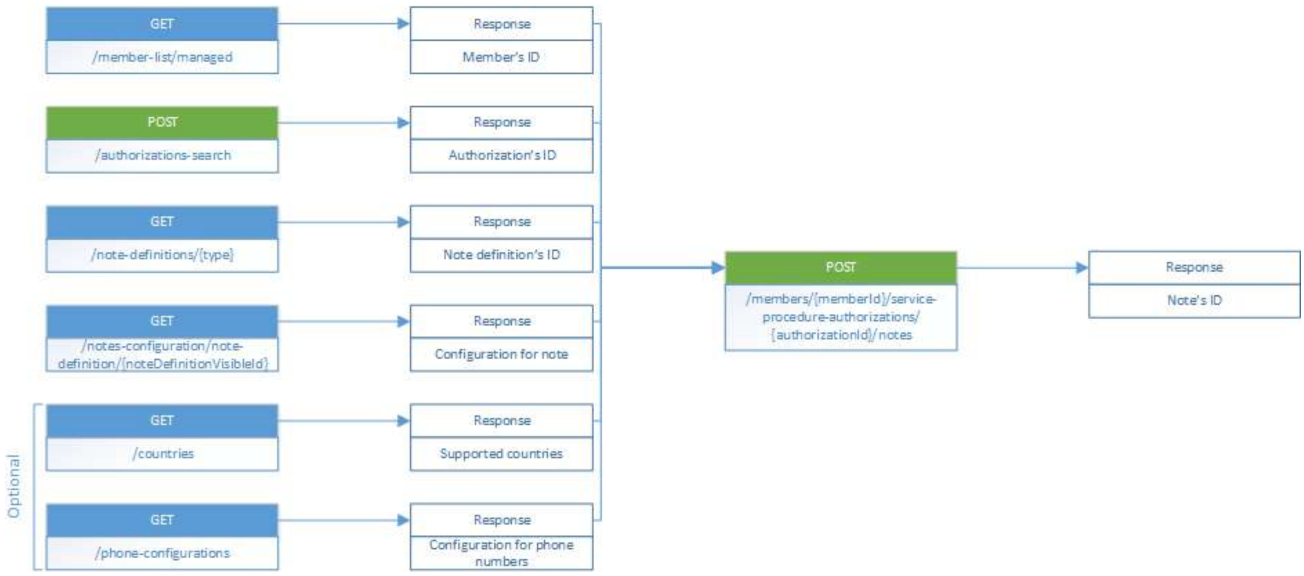
Create a note on a service/procedure (SP) authorization

After reviewing the notes on an SP authorization, you may need to create a note on the authorization. You need specific information to use web services to create a note on the member's SP authorization.

To create a note, you need the following information:

- Member ID
- SP authorization ID
- Definition of the note
- Configuration to create the note
- Information on the supported countries (optional)
- Configuration for phone numbers (optional)

The following graphic shows how to use web services to create a note on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the SP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the GET /note-definitions/{type} web service with the type AUTH to retrieve the available definitions.
6. Store the ID of the note's definition.
7. Use the note definition ID and the GET /notes-configuration/note-definition/{note DefinitionVisibleId} web service to retrieve the configuration for the note.

8. (Optional) If including international phone numbers on the note, use the GET /countries web service to retrieve information on the supported countries.
9. (Optional) If including phone numbers on the note, use the GET /phone-configurations web service and the country information, if applicable, to get the configuration for phone numbers.
10. Use the member ID, the SP authorization ID, the note information, and the POST /members/{member Id}/service-procedure-authorizations/{authorizationId}/notes web service to create the note on the member's SP authorization.

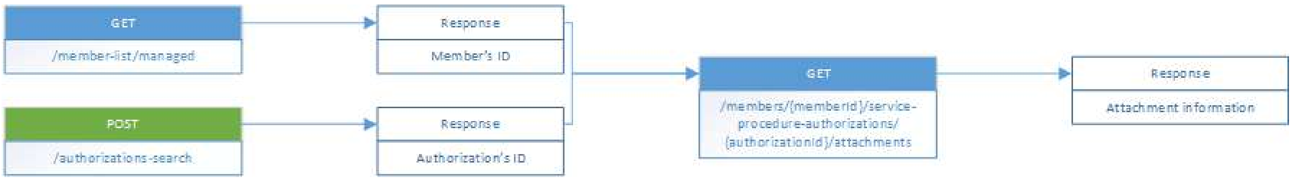
Get the attachments on a service/procedure (SP) authorization

You may need to review the attachments on an SP authorization with the member. You need specific information to use web services to retrieve the attachments on a member's SP authorization.

To retrieve the attachments, you need the following information:

- Member ID
- SP authorization ID

The following graphic shows how to use web services to retrieve the attachments on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the SP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the member ID, the SP authorization ID, and the GET /members/{memberId}/service- procedure-authorizations/{authorizationId}/attachments web service to retrieve the attachments on the member's SP authorization.

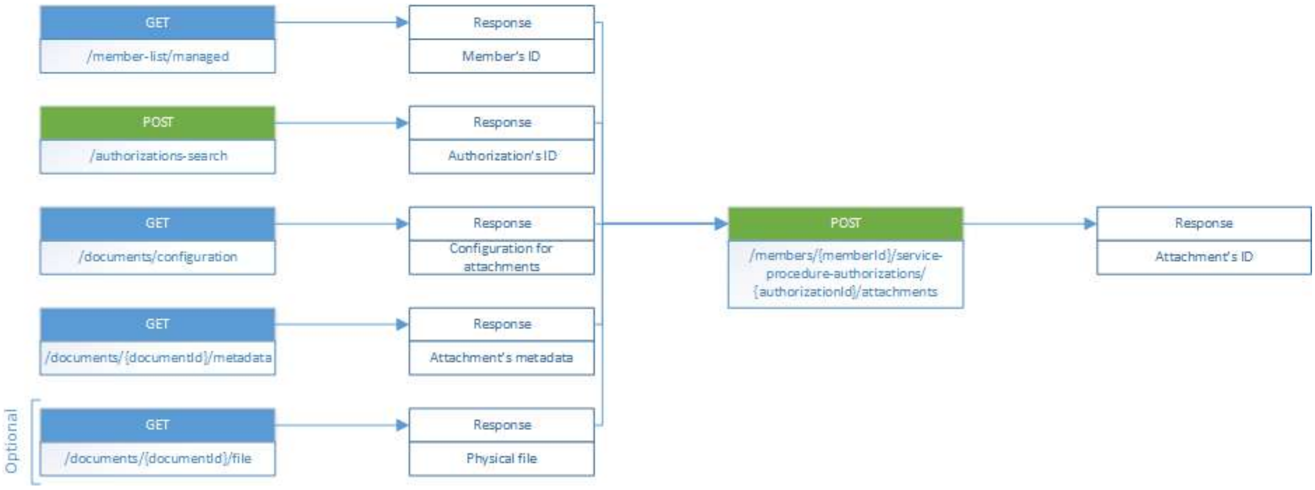
Create an attachment on a service/procedure (SP) authorization

After reviewing or completing an SP authorization with the member, you may need to create an attachment on the authorization. You need specific information to use web services to create an attachment on a member's SP authorization.

To create an attachment, you need the following information:

- Member ID
- SP authorization ID
- Configuration for attachments
- Attachment's metadata
- Physical file (optional)

The following graphic shows how to use web services to create an attachment on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the SP authorization you want to update.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the GET /documents/configuration web service to retrieve the configuration for attachments.
6. Use the GET /documents/{documentId}/metadata web service to retrieve the attachment's metadata.
7. (Optional) If attaching a physical file (instead of a URL), use the GET /documents/{documentId}/ file web service to retrieve the physical file.
8. Use the member ID, the authorization ID, the attachment's information, and the POST /members/

{memberId}/service-procedure-authorizations/{authorizationId}/attachments web service to create the attachment on the member's SP authorization.

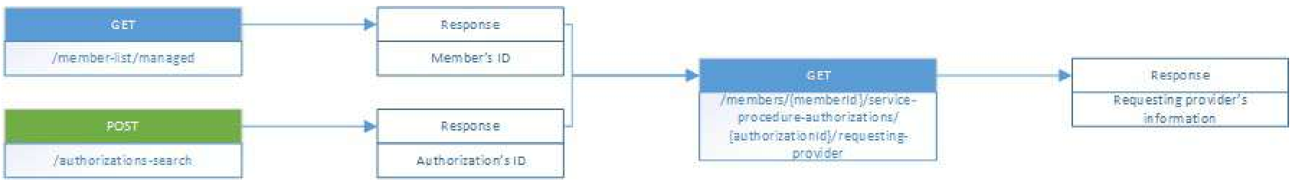
Get the requesting provider on a service/ procedure (SP) authorization

You may need to review the requesting provider on the SP authorization with the member. You need specific information to retrieve the requesting provider on a member's SP authorization.

To retrieve the requesting provider, you need the following information:

- Member ID
- SP authorization ID

The following graphic shows how to use web services to retrieve the requesting provider on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.

2. Store the member ID.
3. Search for the SP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the member ID, the SP authorization ID, and the GET /members/{memberId}/service-procedure-authorizations/{authorizationId}/requesting-provider web service to retrieve the requesting provider on a member's SP authorization.

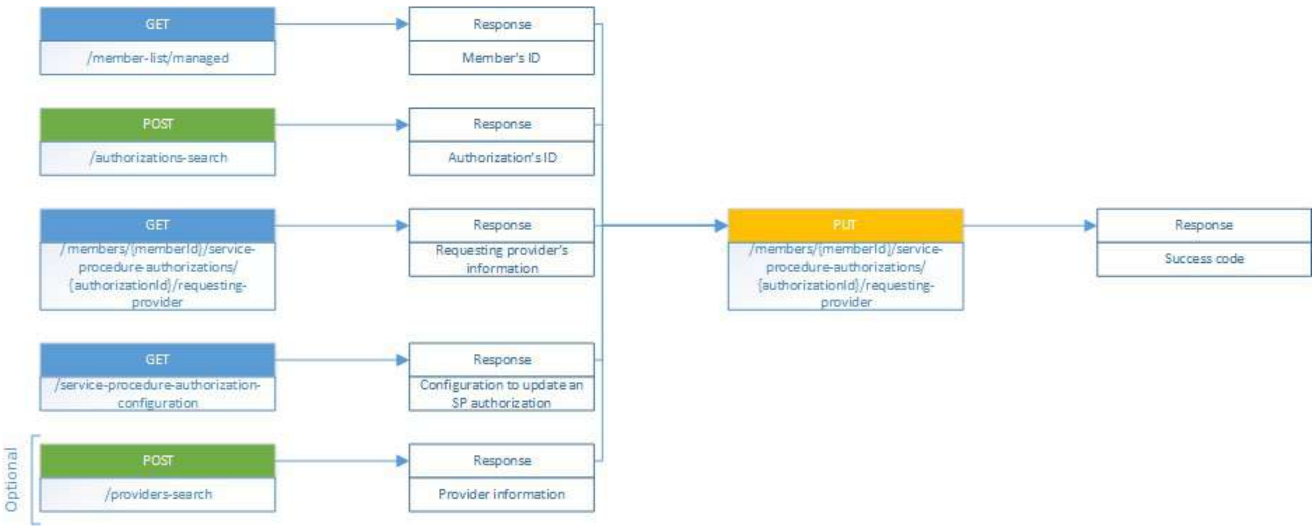
Update the requesting provider on a service/ procedure (SP) authorization

After reviewing the requesting provider on an SP authorization with the member, you may need to update the provider's information. You need specific information to use web services to update the requesting provider on a member's SP authorization.

To update the requesting provider, you need the following information:

- Member ID
- SP authorization ID
- Current requesting provider information
- Configuration to update an SP authorization
- Provider information (optional)

The following graphic shows how to use web services to update the requesting provider on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the SP authorization you want to update.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the member ID, the authorization ID, and the GET /members/{memberId}/service-procedure-authorizations/{authorizationId}/requesting-provider web service to retrieve the requesting provider on the member's SP authorization.
6. Use the GET /service-procedure-authorization-configuration web service to retrieve the configuration to update an SP authorization.
7. (Optional) If changing the provider, search for and store the appropriate provider. Refer to Search for a provider [231] on page 301 for more information.

8. Use the member ID, the SP authorization ID, the updated provider information, and the PUT /members/

{memberId}/service-procedure-authorizations/{authorizationId}/requesting- provider web service to update the requesting provider on the member's SP authorization.

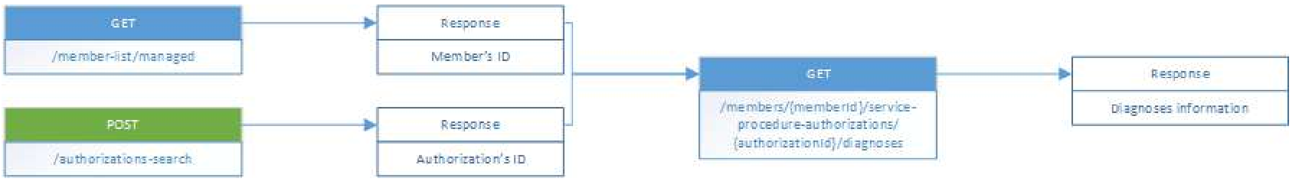
Get the diagnoses on a service/procedure (SP) authorization

You may need to review the diagnoses information on a member's SP authorization. You need specific information to use web services to retrieve the diagnoses on the authorization.

To retrieve the diagnoses, you need the following information:

- Member ID
- SP authorization ID

The following graphic shows how to use web services to retrieve the diagnoses information on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the SP authorization you want to view.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the member ID, the SP authorization ID, and the GET /members/{memberId}/service-procedure-authorizations/{authorizationId}/diagnoses web service to retrieve the diagnoses on the member's SP authorization.

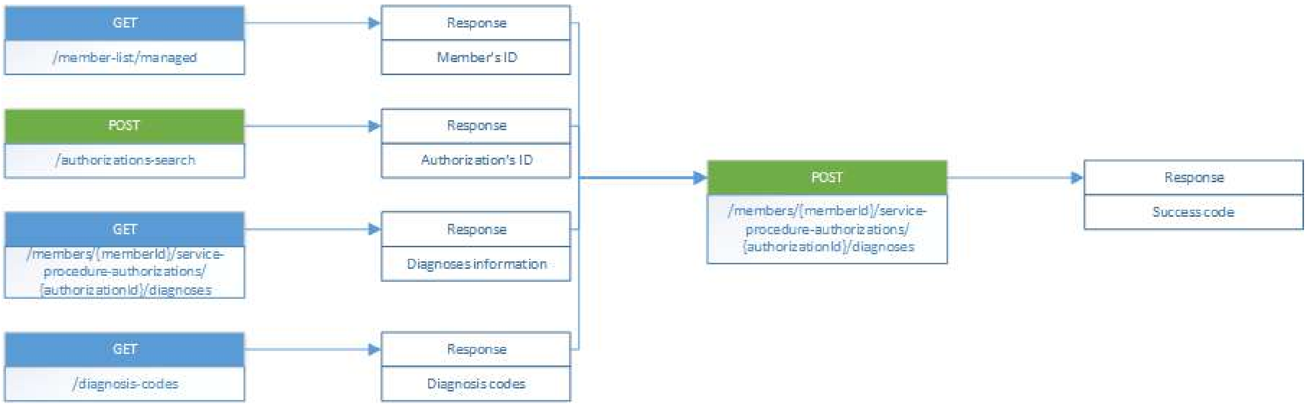
Update the diagnoses on a service/procedure (SP) authorization

After reviewing the diagnoses on the SP authorization, you may need to update the diagnosis, including adding and removing a diagnosis, on the authorization. You need specific information to update the diagnoses on a member's SP authorization.

To update the diagnoses, you need the following information:

- Member ID
- SP authorization ID
- Existing diagnosis information
- Diagnosis codes

The following graphic shows how to use web services to update the diagnoses on a member's SP authorization.



1. Retrieve the member ID to retrieve the SP authorization.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the SP authorization you want to update.

   Refer to Search for a member's authorization [75] on page 101 for more information.
4. Store the authorization ID.
5. Use the member ID, the SP authorization ID, and the GET /members/{memberId}/service-procedure-authorizations/{authorizationId}/diagnoses web service to retrieve the current diagnoses on the SP authorization.
6. (Optional) If adding a diagnosis, use the GET /diagnosis-codes web service to retrieve the diagnosis information to add to the authorization.
7. Use the member ID, the SP authorization ID, the diagnosis information if adding a diagnosis, and the POST /members/{memberId}/service-procedure-authorizations/{authorizationId}/ diagnoses web service to update the diagnoses on the member's SP authorization.

Service requests

You can use web services to interact with a member's service requests.

The following describes how to use web services to interact with a member's service requests. For example, you can submit a service request and close a service request.

Topics in this section

Create a service request [284] on page 371

You may need to create a service request for a member. You need specific information to use web services to create a service request for the member.

Close a service request [286] on page 373

After reviewing the service request with the member, you may need to close the service request. You need specific information to use web services to close a member's service request.

Void a service request [286] on page 374

If a service request was recorded erroneously, you can void the service request. You need specific information to use web services to void a member's service request.

Create a service request

You may need to create a service request for a member. You need specific information to use web services to create a service request for the member.

To create a service request, you need the following information:

- Member ID
- Configuration for service requests
- Configuration for service request line items
- Configuration for service request's header
- Appropriate service offer
- Details on the service offer
- Supported countries (optional)
- Configuration for addresses (optional)

The following graphic shows how to use web services to create a service request for a member.

1. Retrieve the member ID to create the service request.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the member ID and the GET /members/{memberId}/member-details web service to retrieve the member's BHP node.
4. Store the member's BHP node.
5. Use the member's BHP node and the GET /service-request-configuration/bhp-configuration web service to retrieve the configuration for service requests based on the BHP node.
6. Use the GET /service-request-lineitem-configuration web service to retrieve the configuration to create a service request line item.
7. Use the GET /service-request-header-configuration web service to retrieve the configuration for a service request's header.
8. Use the GET /service-offer-search-configuration web service to retrieve the configuration to search for a service offer to use on the service request.

9. Use the search configuration and the POST /service-offers/search web service to search for the service offer you want to use on the service request.
10. Store the ID of the service offer.
11. Use the member ID, the service offer ID, and the GET /members/{memberId}/service-offers/

    {serviceOfferId} web service to retrieve the details on the service offer.
12. (Optional) If including international addresses on the service request, use the GET /countries web service to retrieve information on the supported countries.
13. (Optional) If including addresses on the service request, use the GET /address-configurations

    web service and the country information, if applicable, to retrieve the configuration for addresses.
14. Use the member ID, the service request ID, and the POST /members/{memberId}/service-requests web service to create a service request for the member.

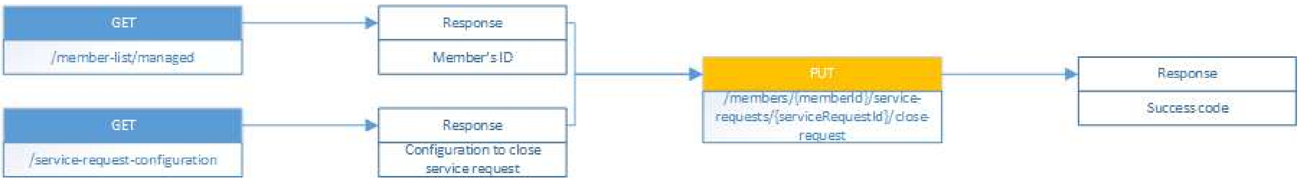
Close a service request

After reviewing the service request with the member, you may need to close the service request. You need specific information to use web services to close a member's service request.

To close a service request, you need the following information:

- Member ID
- Service request ID
- Configuration to close a service request

The following graphic shows how to use web services to close a member's service request.



1. Retrieve the member ID to close the service request.

    Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.
3. Use the GET /service-request-configuration web service to retrieve the configuration to close a service request.
4. Use the member ID, the service request ID, the closure information, and the PUT /members/{member Id}/service-requests/{serviceRequestId}/close-request web service to close the member's service request.

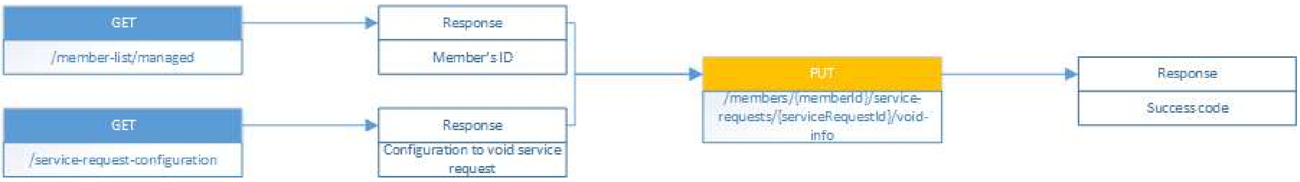
Void a service request

If a service request was recorded erroneously, you can void the service request. You need specific information to use web services to void a member's service request.

To void a service request, you need the following information:

- Member ID
- Service request ID
- Configuration to void a service request

The following graphic shows how to use web services to void a member's service request.



1. Retrieve the member ID to void the service request.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the GET /service-request-configuration web service to retrieve the configuration to close a service request.
4. Use the member ID, the service request ID, the closure information, and the PUT / members/{member Id}/service-requests/{serviceRequestId}/void-info web service to void the member's service request.

Tasks

You can use web services to interact with a member's tasks.

The following sections describe how to use web services to interact with a member's tasks. For example, you can create a task instance, comment on a task instance, and complete a task using the available web services.

Topics in this section

You may have tasks to complete associated with a member. You need specific information to use the web services to search for a member's task.

You may need to review the details of a task with the member. You need specific information to use the web services to retrieve the task's details.

You may need to create a task for the member. You need specific information to use the web services to create a task.

You may need to review the comments you made, or another user made, on a task. You need specific information to use the web services to retrieve the task's comments.

After reviewing the details on a task, you may need to create a comment on a task. You need specific information to use the web services to create a comment on a task.

You may have made an attempt to complete a task, for example, you attempted to call the member about the member's care plan but was unsuccessful in reaching them. You need specific information to use the web services to record an attempt on the task.

After completing a task, you can use web services to mark a generic task complete (closed). You need specific information to use the web services to mark a generic task complete (closed).

After reviewing a workflow task with the member, you may need to cancel the task. You need specific information to use the web services to cancel a workflow task.

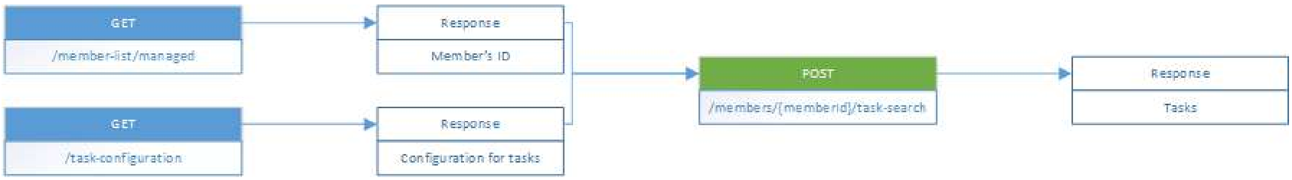
Search for a member's task

You may have tasks to complete associated with a member. You need specific information to use the web services to search for a member's task.

To search for a member's task, you need the following information:

- Member ID
- Configuration for tasks

The following graphic shows how to use web services to search for a member's tasks.



1. Retrieve the member ID to use in the search.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the GET /task-configuration web service to retrieve the configuration to use in the search.
4. Use the member ID, the task's configuration, and the POST /members/{memberId}/task-search

web service to search for the member's task.

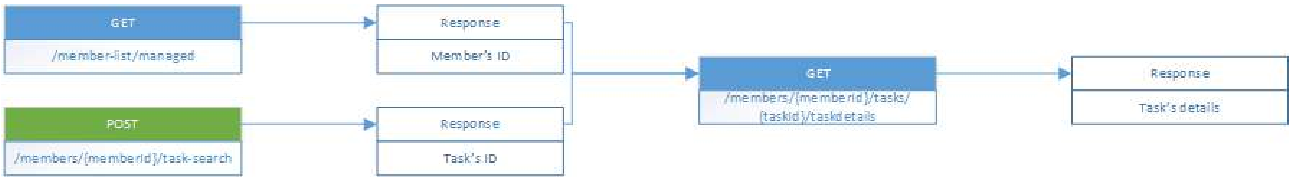
Get the details on a member's task

You may need to review the details of a task with the member. You need specific information to use the web services to retrieve the task's details.

To get the task's details, you need the following information:

- Member ID
- Task ID

The following graphic shows how to use web services to retrieve the details on a member's task.



1. Retrieve the member ID to retrieve the task.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the task you want to view.

   Refer to Search for a member's task [288] on page 375 for more information.
4. Store the task ID.
5. Use the member ID, the task ID, and the GET /members/{memberId}/tasks/{taskId}/taskdetails web service to get the details on the member's task.

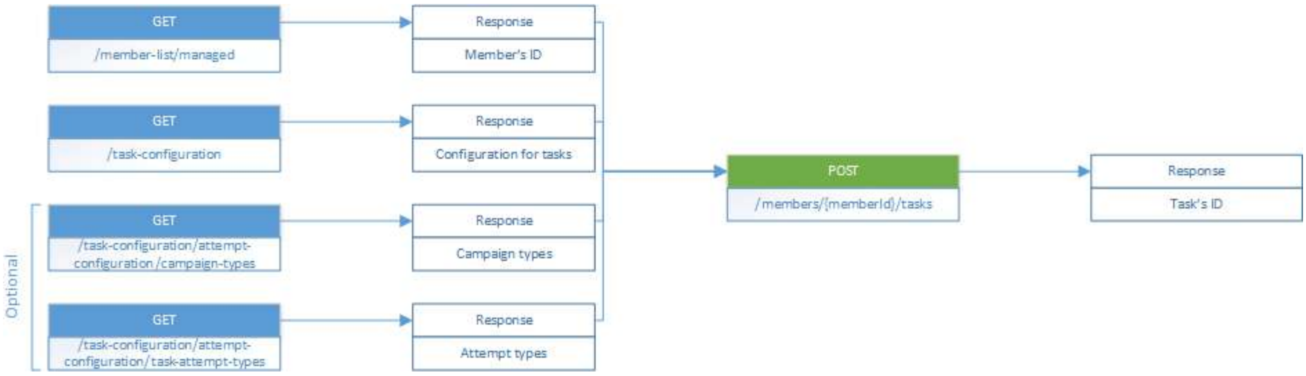
Create a task

You may need to create a task for the member. You need specific information to use the web services to create a task.

To create a task, you need the following information:

- Member ID
- Configuration to create a task
- Available campaign types (optional)
- Available types of task attempts (optional)

The following graphic shows how to use web services to create a task for a member.



1. Retrieve the member ID to create the task.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Use the GET /task-configuration web service to get the configuration to create a task.
4. (Optional) If including campaign types on the task, use the GET /task-configuration/attempt-configuration/campaign-types web service to retrieve the available campaign types.
5. (Optional) If including an attempt, use the GET /task-configuration/attempt-configuration/task-attempt-type web service to retrieve the available attempt types.
6. Use the member ID, the task's information, and the POST /members/{memberId}/tasks web service to create the task for the member.

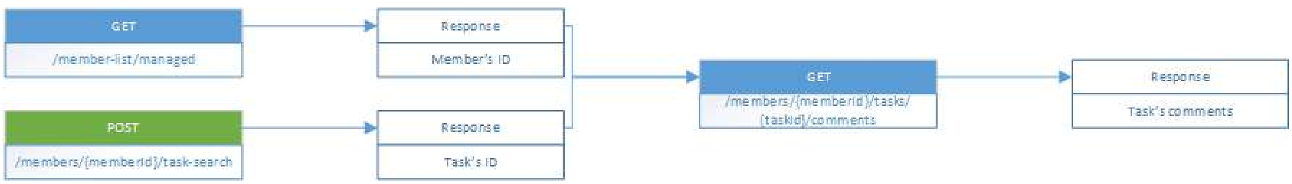
Get the comments on a task

You may need to review the comments you made, or another user made, on a task. You need specific information to use the web services to retrieve the task's comments.

To get the comments on a task, you need the following information:

- Member ID
- Task ID

The following graphic shows how to use web services to retrieve the comments on a member's task.



1. Retrieve the member ID to retrieve the task.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the task you want to review.

   Refer to Search for a member's task [288] on page 375 for more information.

4. Store the task ID.
5. Use the member ID, the task ID, and the GET /members/{memberId}/tasks/{taskId}/comments

web service to get the comments on the member's task.

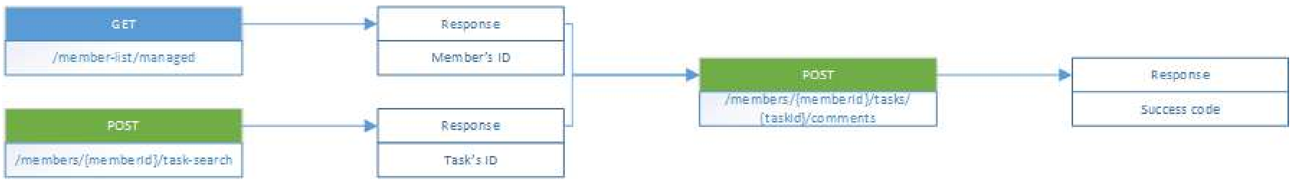
Create a comment on a task

After reviewing the details on a task, you may need to create a comment on a task. You need specific information to use the web services to create a comment on a task.

To create a comment on a task, you need the following information:

- Member ID
- Task ID

The following graphic shows how to use web services to create a comment on a member's task.



1. Retrieve the member ID to retrieve the task.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Store the member ID.
3. Search for the task you want to update.

   Refer to Search for a member's task [288] for more information.
4. Store the task ID.
5. Use the member ID, the task ID, the comment, and the POST /members/{memberId}/tasks/{task Id}/comments web service to create a comment on a task.

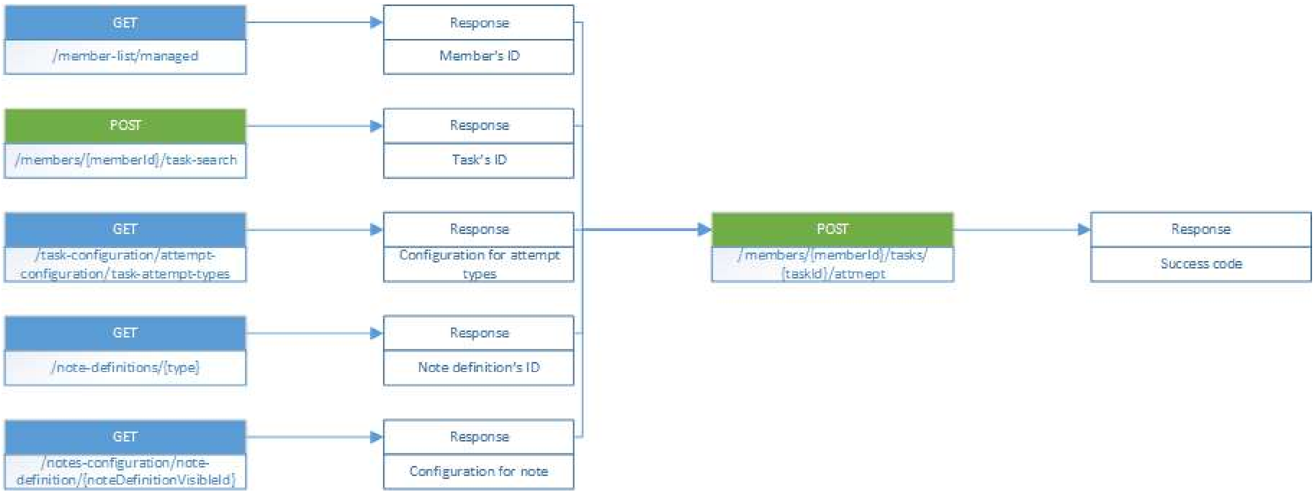
Create an attempt on a task

You may have made an attempt to complete a task, for example, you attempted to call the member about the member's care plan but was unsuccessful in reaching them. You need specific information to use the web services to record an attempt on the task.

To create a task attempt, the user needs the following information:

- Member ID
- Task ID
- Available task attempt types
- Available note definitions and the associated configuration (optional)

The following graphic shows how to use web services to create an attempt on a member's task.



1. Retrieve the member ID to retrieve and update the task.

   Refer to Get a managed members list [166] on page 219 or Search for a member [168] on page 221 for more information.
2. Store the member ID.
3. Search for the task you want to update.

   Refer to Search for a member's task [288] on page 375 for more information.
4. Store the task ID.
5. Use the GET /task-configuration/attempt-configuration/task-attempt-types web service to get the available attempt types.
6. If including a note, use the GET /note-definitions/{type} web service to retrieve the IDs of the available notes, then use the ID and the GET /notes-configuration/note-definition/{note DefinitionVisibleId} web service to get the configuration to create the note.
7. Use the member ID, the task ID, the attempt's information, and the POST /members/{memberId}/ tasks/{taskId}/attempt web service to create a task attempt.

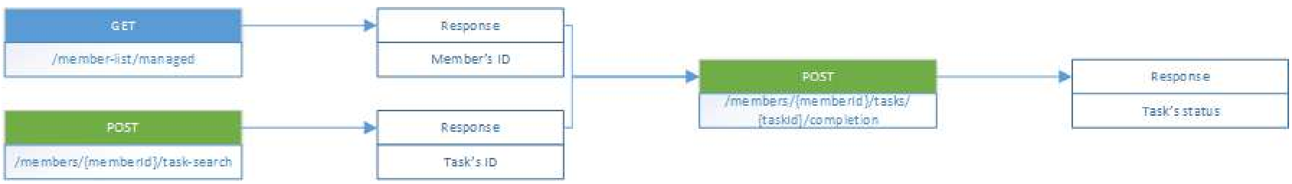
Complete a generic task

After completing a task, you can use web services to mark a generic task complete (closed). You need specific information to use the web services to mark a generic task complete (closed).

To complete a generic task, you need the following information:

- Member ID
- Task ID

The following graphic shows how to use web services to complete (close) a member's generic task.



1. Retrieve the member ID to complete the task.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Search for the task you want to complete (close).

   Refer to Search for a member's task [288] for more information.
3. Store the task ID.
4. Use the member ID, the task ID, and the POST /members/{memberId}/tasks/{taskId}/completion web service to mark the task complete (closed).

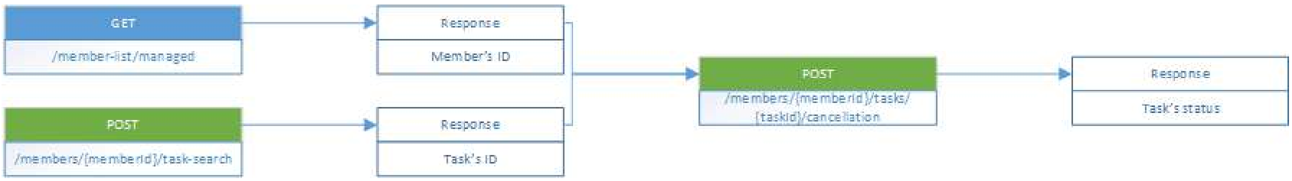
Cancel a workflow task

After reviewing a workflow task with the member, you may need to cancel the task. You need specific information to use the web services to cancel a workflow task.

To cancel a workflow task, you need the following information:

- Member ID
- Task ID

The following graphic shows how to use web services to cancel a member's workflow task.



1. Retrieve the member ID to retrieve and cancel the task.

   Refer to Get a managed members list [166] or Search for a member [168] for more information.
2. Search for the task you want to cancel.

   Refer to Search for a member's task [288] for more information.
3. Store the task ID.
4. Use the member ID, the task ID, and the POST /members/{memberId}/tasks/{taskId}/cancellation web service to cancel the workflow task.

Teams

You can use web services to interact with teams.

The following sections describe how to use web services to interact with teams. For example, you can use web services to get the information on the available teams.

Topics in this section

You may need to assign a task to a team. You need specific information to use the web services to get the information on the available teams.

Get information on the available teams

You may need to assign a task to a team. You need specific information to use the web services to get the information on the available teams.

To get the available teams, you can use the following information:

- BHP node

The following graphic shows how to use web services to retrieve the information on the available teams.

1. (Optional) If looking for teams associated with a specific BHP node, use the GET /admin/bhp-nodes

   web service to get the available BHP nodes.
2. Use the BHP node, if applicable, and the GET /teams web service to get information on the available teams.

User profile

You can use web services to interact with your profile or another user's profile.

The following section describes how to use web services to interact with a user's profile. For example, you can get information on a user's profile and update a user's profile.

Topics in this section

Get a user's profile [293] on page 382

You may need to review your own, or another user's, profile to ensure its accuracy. You can use web services to retrieve the profile information. You need specific information to use the web services successfully.

Update a user's profile [293] on page 382

After reviewing your own profile, or another user's profile, you may need to update the profile. You can use web services to update the profile. You need specific information to use the web services successfully.

Get a user's email notifications for tasks [294] on page 384

You may need to review your own or another user's email notifications. You need specific information to use the web services to retrieve the email notifications.

Create an email notification for a task [295] on page 384

After reviewing a user's email notifications, you may need to create an email notification. You need specific information to use the web services to create an email notification for a task.

Delete a user's email notification for tasks [296] on page 385

After reviewing your own, or another user's, email notifications, you may need to delete an email notification. You need specific information to use web services to delete an email notification.

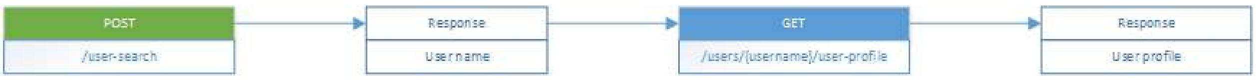
Get a user's profile

You may need to review your own, or another user's, profile to ensure its accuracy. You can use web services to retrieve the profile information. You need specific information to use the web services successfully.

To get a profile, you need the following information:

- User name

The following graphic shows how to use web services to retrieve a user's profile.



1. Search for the user profile that you need to review.

   Refer to Search for a user [297] on page 387 for more information.
2. Store the user name.
3. Use the user name and the GET /users/{username}/user-profile web service to retrieve the profile.

Update a user's profile

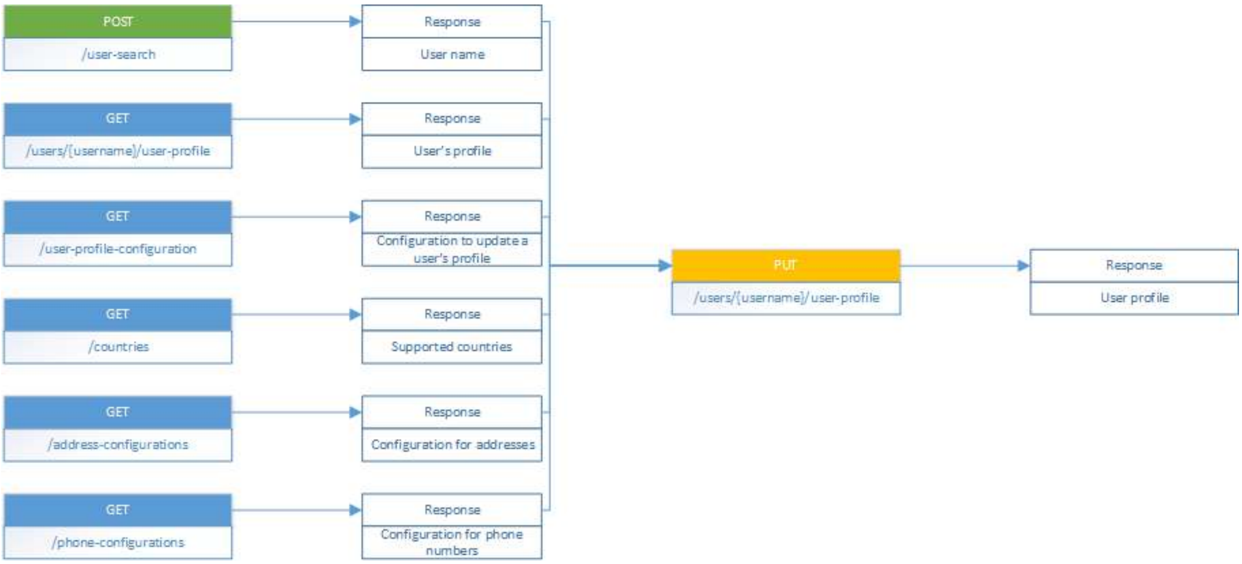
After reviewing your own profile, or another user's profile, you may need to update the profile. You can use web services to update the profile. You need specific information to use the web services successfully.

To update a user's profile, you need the following information:

- User name

- Existing profile information
- Configuration to update a user's profile
- Information on the supported countries (optional)
- Configuration for addresses (optional)
- Configuration for phone numbers (optional)

The graphic shows how to use web services to update a user's profile.



1. Search for the user profile that needs to be updated.

   Refer to Search for a user [297] on page 387 for more information.
2. Store the user name.
3. Use the user name and the GET /users/{username}/user-profile web service to get the current information on the profile.
4. Use the GET /user-profile-configuration web service to retrieve the configuration to update a profile.
5. (Optional) If adding or updating an international address or phone number on the profile, use the GET / countries web service to retrieve information on the supported countries.
6. (Optional) If adding or updating addresses, use the GET /address-configurations web service and the country information, if applicable, to get the configuration for addresses.
7. (Optional) If adding or updating phone numbers, use the GET /phone-configurations web service and the country information, if applicable, to get the configuration for phone numbers.
8. Use the user name, the updated profile information, and the PUT /users/{username}/user-profile web service to update the profile.

Get a user's email notifications for tasks

You may need to review your own or another user's email notifications. You need specific information to use the web services to retrieve the email notifications.

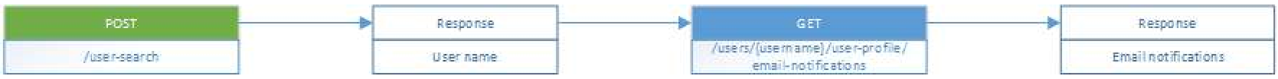
In order to use this feature:

- The TruCare administrator must configure TruCare to use an SMTP server to enable email notification in TruCare Admin. See the *TruCare Admin Guide* for details on configuring the Email Notification Settings in System Management.
- Any TruCare user who wants to receive email notifications must have at least one email address configured in their user profile in TruCare. See the *TruCare User Guide* for details on adding email addresses to user profiles.

To get the email notifications, you need the following information:

- User name

The following graphic shows how to use web services to retrieve a user's email notifications.



1. Search for the user to view their email notifications.

   Refer to Search for a user [297] on page 387 for more information.
2. Store the user name.
3. Use the user name and the GET /users/{username}/user-profile/email-notifications

web service to retrieve the user's email notifications.

Create an email notification for a task

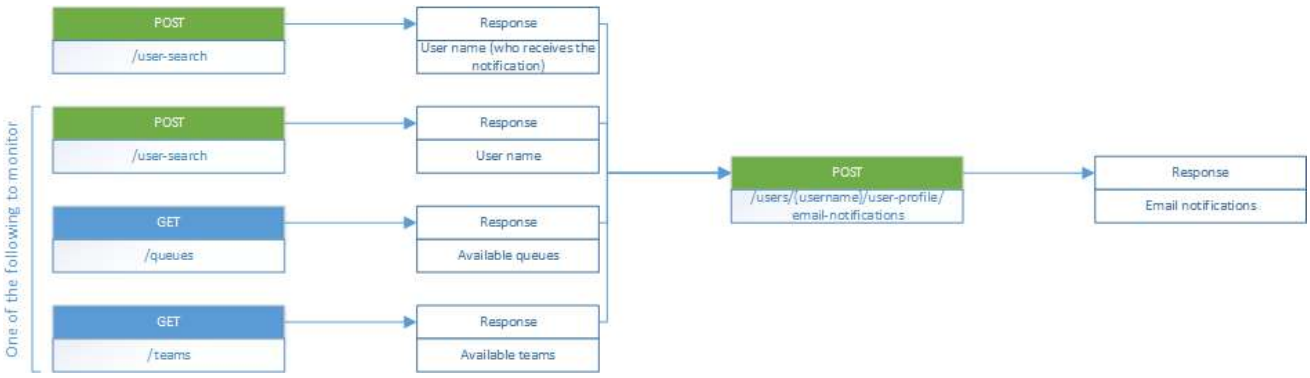
After reviewing a user's email notifications, you may need to create an email notification. You need specific information to use the web services to create an email notification for a task.

In order to use this feature:

- The TruCare administrator must configure TruCare to use an SMTP server to enable email notification in TruCare Admin. See the *TruCare Admin Guide* for details on configuring the Email Notification Settings in System Management.
- Any TruCare user who wants to receive email notifications must have at least one email address configured in their user profile in TruCare. See the *TruCare User Guide* for details on adding email addresses to user profiles.

To create an email notification, you need the following information:

- name of the user, team, or queue to monitor if they are assigned a new task
- how often the person potentially wants to be notified, in hours (value must be between 1 and 24)
- if the user has more than one email address configured in their TruCare profile, which email address to use The following graphic shows how to use web services to create an email notification for a user.



1. Search for the user the needs the email notification.

   Refer to Search for a user [297] on page 387 for more information.
2. Store the user name.
3. Retrieve the appropriate user, queue, or team to monitor.

   Refer to Search for a user [297] on page 387, Get information on the available queues [233] on page 304, and Get information on the available teams [292] on page 381 for more information.
4. Use the user name, the notification's information, and the POST /users/{username}/user-profile/email-notifications web service to create the email notification for the user.

When you are setting the frequency, remember the **Job Frequency** setting in the Email Notification settings in TruCare Admin. The Job Frequency defines how often TruCare polls for new tasks for a user, team, or queue. The frequency in the email notification is how often TruCare may generate emails. If your email notification frequency is set to be more often than the Job Frequency, TruCare tries to send emails before there has been a check to see if there are new tasks. Always set the Email Notification Frequency to be less often than the Job Frequency.

Delete a user's email notification for tasks

After reviewing your own, or another user's, email notifications, you may need to delete an email notification. You need specific information to use web services to delete an email notification.

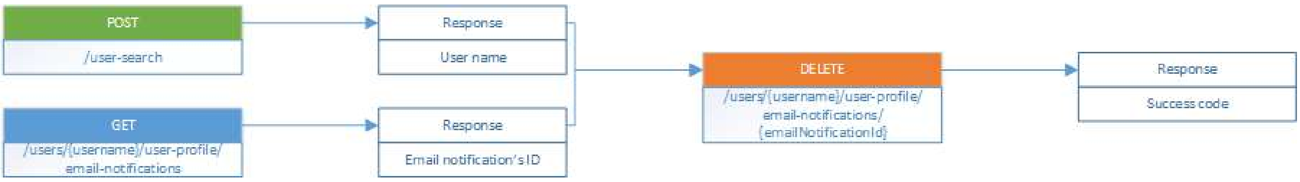
In order to use this feature:

- The TruCare administrator must configure TruCare to use an SMTP server to enable email notification in TruCare Admin. See the *TruCare Admin Guide* for details on configuring the Email Notification Settings in System Management.
- Any TruCare user who wants to receive email notifications must have at least one email address configured in their user profile in TruCare. See the *TruCare User Guide* for details on adding email addresses to user profiles.

To delete a user's email notification, you need the following information:

- User name
- Email notification ID

The following graphic shows how to use web services to delete a user's email notification.



1. Search for the user whose email notification needs to be removed. Refer to Search for a user [297] on page 387 for more information.
2. Store the user name.
3. Use the user name and the GET /users/{username}/user-profile/email-notifications web service to retrieve the user's current email notifications.
4. Store the ID of the email notification that you want to delete.
5. Use the user name, the email notification ID, and the DELETE /users/{username}/user-profile/ email-notifications/{emailNotificationId} web service to delete the email notification for the user.

Users

You can use web services to interact with other users in regards to the user's user name and using their information for assignee.

The following sections describe how to use web services to interact with other users. For example, you can search for other users and get a list of the current users.

Topics in this section

You might be creating a task that needs to be assigned to a different user. You can use web services to search for the correct user.

You may need to ensure they are logged in with the correct user name. You can use web services to get your current log in information.

Get a user's information [297] on page 387

You may need to contact another user. You need specific information to use the web services to retrieve a user's information.

Get the current user's permissions [297] on page 388

You may need to create an artifact (for example, a care plan) for a member. You can use web services to verify your permissions.

Create user activity audit entry [298] on page 388

You can use web services to add a user activity entry to the auditing logs.

Search for a user

You might be creating a task that needs to be assigned to a different user. You can use web services to search for the correct user.

The following graphic shows how to use web services to search for a user.

Use any search criteria and the POST /user-search web service to search for the user.

Get the current user's information

You may need to ensure they are logged in with the correct user name. You can use web services to get your current log in information.

The following graphic shows how to use web services to retrieve information on the current user.

Use the GET /users/current web service to get the current user's information. The information can include the user's first name, last name, and user name.

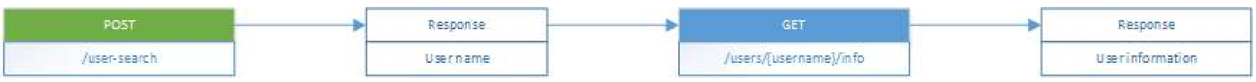
Get a user's information

You may need to contact another user. You need specific information to use the web services to retrieve a user's information.

To get a user's information, you need the following information:

- User name

The following graphic shows how to use web services to retrieve a user's information.



1. Search for the user to view their information.

   Refer to Search for a user [297] on page 387 for more information.
2. Store the user name.
3. Use the user name and the GET /users/{username}/info web service to get the user's information.

Get the current user's permissions

You may need to create an artifact (for example, a care plan) for a member. You can use web services to verify your permissions.

The following graphic shows how to use web services to retrieve your permissions.

Use the GET /users/permissions web service to retrieve your permissions.

Create user activity audit entry

You can use web services to add a user activity entry to the auditing logs.

The following graphic shows how to use web services to add a user activity entry to the auditing logs.

Use the POST /users/activity web service to add a user activity entry to the auditing logs.

User-defined fields

You can use web services to update user-defined fields.

The following sections describe how to use web services to update user-defined fields.

Topics in this section

UDF (user-defined field) behavior

UDFs are submitted to TruCare API web services as fields enclosed in the extendedAttributes object. All UDFs configured to be required must always be included in the request.

For POST operations, optional UDFs that are not available in the request do not persist in the database.

For PUT operations, if an optional UDF is not included in the request, it is removed from the database. If the configuration does not contain required UDFs and the extendedAttributes object is not available in the request, then the entire set of UDFs are removed. This is standard behavior of the RESTful API architecture.

When POST and PUT share the same configuration

When the configuration in TruCare Admin allows the same set of UDFs to be used for the Create and Edit operations, the POST and PUT web services share the same configuration.

For example, all UDFs are configured as optional:

Field	Required
Color	No
Food	No
Sport	No

The following examples are of POST and PUT requests and what persists as the result.

POST	PUT	Persisted Value
Color = Red Food = Pizza	Empty/missing extended Attributes	
Color = Red Food = Pizza	Color = Blue	Color = Blue
Color = Red Food = Pizza	Food = Hamburger	Food = Hamburger
Color = Red Food = Pizza Sport = Tennis	Color = Blue Food = Hamburger Sport = Soccer	Color = Blue Food = Hamburger Sport = Soccer
Empty/missing extended Attributes	Food = Hamburger Sport = Soccer	Food = Hamburger Sport = Soccer

Another example, if one of the UDFs is configured as required.

Table 1:

Field	Required
Color	Yes
Food	No
Sport	No

The following are examples of POST and PUT requests, and what is persisted as the result.

POST	PUT	Persisted Value
Color = Red	Color = Blue	Color = Blue
Color = Red Food = Pizza	Color = Red	Color = Red
Color = Red Food = Pizza	Color = Blue	Color = Blue
Color = Red Food = Pizza	Color = Blue Food = Hamburger	Color = Blue Food = Hamburger
Color = Red Food = Pizza Sport = Tennis	Color = Blue Food = Hamburger Sport = Soccer	Color = Blue Food = Hamburger Sport = Soccer

The following requests would result in an error.

Table 2:

Method	UDFs	Reason
POST/PUT	Sport = Soccer	The Color field is required.
POST/PUT	Empty/missing extended Attributes	The Color field is required.

When POST and PUT use different configurations

For selected screens in TruCare, you can configure user-defined fields (UDFs) for specific actions. For example, one set of UDFs are available for the Create a Case screen. Another set is also available for the Edit a Case screen. One configuration can contain different sets of UDFs, depending on the action parameters.

Therefore, different UDFs can be used for a PUT or PUT required. For example, the Case UDFs are configured as the following.

Case Add Configuration

Field	Required
Color	Yes
Food	No

Case Edit Configuration

Field	Required
Sport	No
Food	No

The following are examples of POST and PUT requests and what persists as the result.

POST	PUT	Persisted Value
Color = Red	Empty/missing extended Attributes	Color = Red
Color = Red Food = Pizza	Empty/missing extended Attributes	Color = Red
Color = Red Food = Pizza	Food = Hamburger	Color = Red Food = Hamburger
Color = Red Food = Pizza	Sport = Soccer	Color = Red Sport = Soccer
POST	**PUT**	**Persisted Value**
Color = Red Food = Pizza	Food = Hamburger Sport = Soccer	Color = Red Food = Hamburger Sport = Soccer

The following requests would result in an error.

Method	UDFs	Reason
POST	Color = Red Sport = Soccer	The Sport field is not configured for the Create a Case screen.
PUT	Color = Red Sport = Soccer	The Color field is not configured for the Edit Case screen.

XML review parser

You can use web services to parse clinical and advisor review documents.

The following sections describe how to use web services to parse clinical and advisor review documents.

Topics in this section

You can parse InterQual® XML documents using web services.

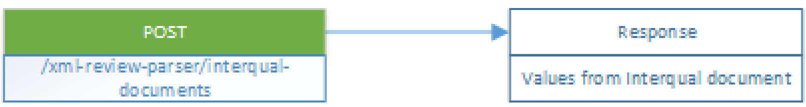
Parse InterQual® XML documents

You can parse InterQual® XML documents using web services.

InterQual®, a product of Change Healthcare, is used to perform a clinical, advisor, or appeal review. To parse an InterQual® XML document, you need the following information:

- Review source - value is either REVIEW_MANAGER or IQCONNECT (for InterQual Connect™)
- The contents of the InterQual® XML file as a string

The following graphic shows how to use web services to parse an InterQual® XML document.



Use the POST /xml-review-parser/interqual-documents web service to parse an InterQual® XML document.