



# TruCare Admin Guide

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**Version 25.2**

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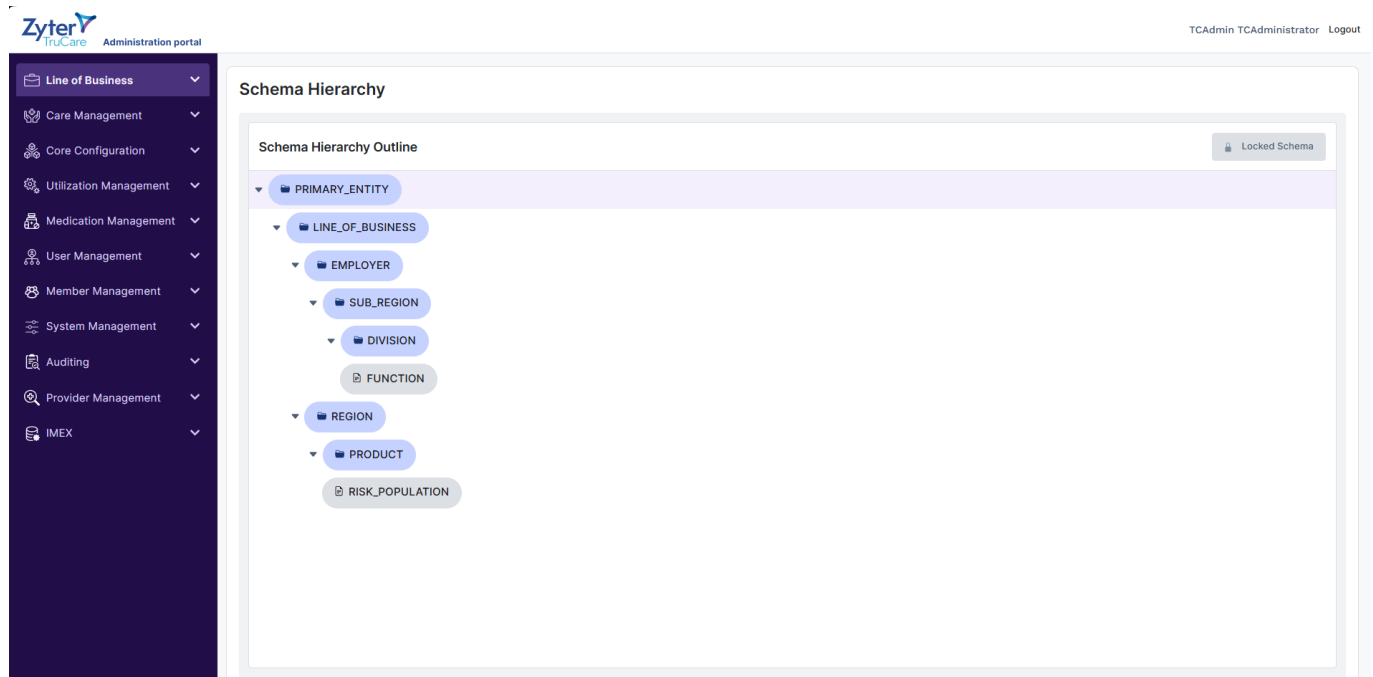
# Introduction

TruCare Admin 25.1 delivers a completely revamped user interface, designed to enhance both performance and usability. This latest version uses a fully HTML-based design to provide a faster, smoother, and more responsive experience. A newly refined navigation menu improves intuitiveness, allowing users to access tools and information more easily with fewer clicks.



## Note

After you make configuration changes in TruCare Admin, ask TruCare users to log out and log back in to ensure the changes take effect in their session.



TruCare Admin v25.1

This section explains the main menus available in TruCare Admin v25.1.

System administrators configure and maintain TruCare using TruCare Admin, which consists of the following components:

1. **Line of Business:** The Line of Business component provides the tools that form the functional infrastructure TruCare uses to model customer organizations' care management operations. It allows users to create healthcare initiatives tailored to the unique needs of individual member populations.
  - Schema Hierarchy
  - Business Hierarchy
  - Feature Matrix
  - Program Matrix
  - Customer Set up
  - Member filter
2. **Care Management:** The Care Management component includes tools that let users set up and manage program-related artifacts and functionalities within TruCare. It enables administrators to tailor TruCare artifacts to align with organizational workflows and clinical requirements.
  - Assessments
  - Programs

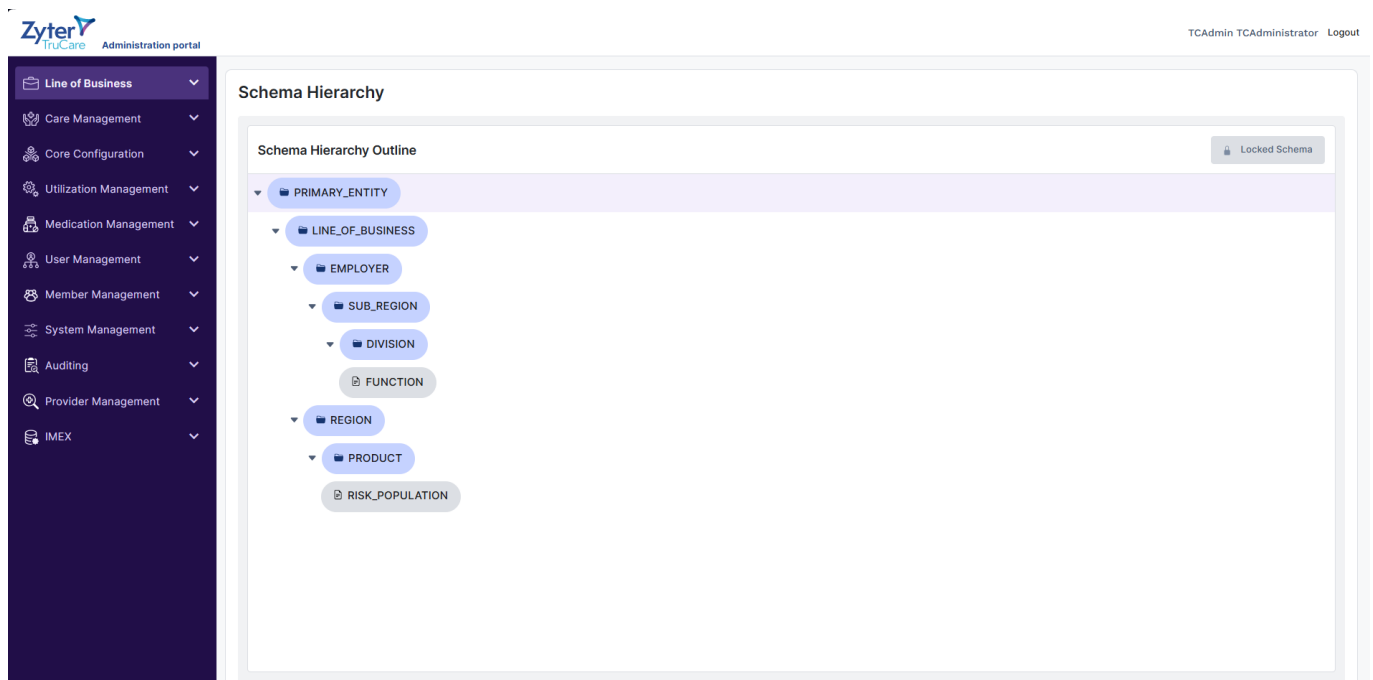
- Care Plans
- MCG Guided Care
- 3. **Core Configuration:** The Core Configuration component is comprised of the tools to allow the customization, set up and management of the Core screens used throughout TruCare.
  - Notes
  - Tasks and Queues
  - Correspondence
  - Distributed Correspondence
  - Drop-Down Values
  - User Defined Fields
  - Key Metrics
  - Cost Savings Events
  - Product Features
- 4. **Utilization Management:** The Utilization Management component includes tools that let users customize, set up, and manage the Utilization Management screens used throughout TruCare.
  - Authorization Search
  - Determination Status Mapping
  - Authorization Settings
- 5. **Medication Management:** The Medication Management component provides tools that enable Admin users to configure medications and adjust settings for optimal medication management within TruCare.
  - Medication Settings
  - Measure Definitions
- 6. **User Management:** The User Management component includes tools that let users create TruCare users, Admin users, assign user permissions, and set up Teams for use within TruCare.
  - Users
  - Role Groups
  - Roles
  - Teams
  - Admin Groups
  - Company Groups
- 7. **Member Management:** Admin users use the Member Management component to manage member search criteria, reconciliation elements, Member Dashboard parameters, Mobile lock capabilities, and the settings and configurations needed for member management in TruCare.
  - Member Dashboard
  - Member Demographics
  - Member Reconciliation
  - Member Search
  - Mobile Offline and Lock Timer
- 8. **System Management:** The System Management component includes tools that allow users to manage TruCare environment settings, data management, security settings, external services, user notifications, TruCare eventing, and license updates.
  - Data Management
  - Environment Settings

- Security Settings
  - External Services
  - User Notifications
  - Events
  - Update License
9. **Auditing:** The Auditing component enables Admin users to audit logs by user or by member within TruCare.
    - Logs By User
    - Logs By Member
    - HTML5 Logs By User
    - HTML5 Logs By Member
  10. **Provider Management:** The Provider Management component provides tools that enable Admin users to configure and manage settings for searching Providers in TruCare.
    - Provider Search Settings
  11. **IMEX:** Admin users use the IMEX component to control settings, manage file locations, and monitor logs for IMEX and integration activities.
    - Import Configuration
    - Export Configuration

## Navigation updates

TruCare Admin v25.1 features a completely revamped user interface designed to enhance performance and usability. The latest version offers a fully HTML-based interface, providing customers with a smoother and more responsive experience. Additionally, the refined navigation menu improves intuitiveness and user-friendliness.

The updated navigation menu now includes the following categories:



TruCare Admin v25.1

Click the links below to access the updated navigation menus.

1. [Line of Business \[47\]](#)
2. [Care Management \[70\]](#)
3. [Core Configuration \[139\]](#)

4. [Utilization Management \[198\]](#)
5. [Medication Management \[201\]](#)
6. [User Management \[207\]](#)
7. [Member Management \[224\]](#)
8. [System Management \[227\]](#)
9. [Auditing \[263\]](#)
10. [Provider Management \[265\]](#)
11. [IMEX \[266\]](#)

## Navigation Menu Categories

Main Menu	Secondary menu	Harman	Components
Line of Business	Schema Hierarchy	DCM	<ul style="list-style-type: none"> <li>Schema Setup configuration</li> </ul>
	Business Hierarchy	DCM	<ul style="list-style-type: none"> <li>Identify Label/Feed IDs</li> <li>View existing structure</li> <li>Add/Remove Child Nodes</li> <li>Add/Edit Features and Programs</li> </ul>
	Feature Matrix	DCM	<ul style="list-style-type: none"> <li>View Only Feature screen by Business Hierarchy</li> </ul>
	Program Matrix	DCM	<ul style="list-style-type: none"> <li>View Only Program screen by License Feature and Business Hierarchy</li> </ul>
	Customer Setup	DCM	<ul style="list-style-type: none"> <li>Configuration of License Features by Business Hierarchy</li> </ul>
	Member Filter	DCM	<ul style="list-style-type: none"> <li>Create a Member Filter</li> <li>View Member Filters</li> </ul>
Care Management	Assessment	Clinical Configuration	<ul style="list-style-type: none"> <li>Assessment Save, Creation, Edit, Copy, Preview, Version, Disable</li> <li>Question Group Save, Creation, View, Edit, Copy, Version, Disable</li> <li>Question Save, Creation, View, Edit, Copy, Version, Disable</li> </ul>
	Programs	DCM	<ul style="list-style-type: none"> <li>Program Creation, View and Edit</li> <li>Service Level assignment</li> <li>Task Package assignment</li> </ul>
	Care Plans	Clinical Configuration	<ul style="list-style-type: none"> <li>Care Plan Library → Care Plan Save, Creation, View, Edit, Copy, Version, Disable, Assign Note</li> <li>Problem Library → Problems Save, Creation, Copy, Version, Disable, Assign Note</li> <li>Objective Library → Objectives Save, Creation, View, Edit, Copy, Version, Disable</li> <li>Actions Library → Actions Save, Creation, View, Edit, Copy, Version, Disable</li> </ul>
	MCG Guided Care	System Management /	<ul style="list-style-type: none"> <li>Connection settings</li> <li>Update/Retrieve/Deactivate</li> </ul>

Main Menu	Secondary menu	Harman	Components
		Third party Configuration	
Core Configuration	Notes	Clinical Configuration	<ul style="list-style-type: none"> <li>Notes configuration → Notes Save, Creation, View, Version, Disable</li> </ul>
	Tasks and Queues	Clinical Configuration / Technical Configuration	<ul style="list-style-type: none"> <li>Task and Queues Management → Tasks Management and Queue Management</li> <li>Column selection and ordering</li> <li>System Queue identification</li> <li>Task Library → Tasks Save, Creation, View, Edit, Copy, Disable</li> <li>Task Packages → Task Packages Save, Creation, View, Edit, Copy, Disable</li> <li>Task Configuration → Tasks Save, Creation, View, Edit, Copy, Disable</li> </ul>
	Correspondence	Clinical Configuration	<ul style="list-style-type: none"> <li>Templates → Templates Save, Creation, Preview, Void</li> <li>Rule Summary → Rules Creation, View, Edit, Copy, Disable</li> <li>User Defined Tags → Tags Creation, View, Edit, Copy, Disable</li> <li>Library Documents → Creation of Library Documents Creation, Preview, View, Edit, Disable</li> </ul>
	Drop-Downs	Technical Configuration	<ul style="list-style-type: none"> <li>Drop-Down Search</li> <li>Drop-Down Configuration – View, Edit, Mandatory, Defaults</li> <li>Export/Import CSV Data</li> </ul>
	User Defined Fields	Technical Configuration	<ul style="list-style-type: none"> <li>UDF Search</li> <li>UDF Configuration – View, Edit, Disable, Mandatory, Screen Ordering</li> <li>Export/Import CSV Data</li> </ul>
	Key Metrics	Clinical Configuration	<ul style="list-style-type: none"> <li>Key Metrics Configuration – Create, View, Copy, Disable</li> </ul>
	Cost Savings	Technical Configuration	<ul style="list-style-type: none"> <li>Cost Savings Configuration – View, Edit</li> </ul>
	Product Features	Clinical Configuration	<ul style="list-style-type: none"> <li>Product Feature → Product Feature Library – Create, View, Copy, Disable</li> <li>Feature Services – Create, View, Copy, Disable</li> </ul>
Utilization Management	Authorization Search	Technical Configuration	<ul style="list-style-type: none"> <li>Column configuration</li> </ul>
	Determination Status Mapping	Technical Configuration	<ul style="list-style-type: none"> <li>Mapping Status to Explanation</li> </ul>
	Authorization Settings	System Management	<ul style="list-style-type: none"> <li>Details</li> <li>Code Expiration Date Settings</li> </ul>

Main Menu	Secondary menu	Harman	Components
			<ul style="list-style-type: none"> <li>▪ Prescreen Settings</li> <li>▪ IP/SP Auth/Line-item limits</li> <li>▪ SR Auth/Line-item limits</li> <li>▪ Clinical Criteria</li> <li>▪ Launch Pad via Jump Page</li> <li>▪ Provider Affiliation</li> </ul>
Medication Management	Medication Settings	System Management	<ul style="list-style-type: none"> <li>▪ RX Claims</li> <li>▪ Medication Duplicate Therapy</li> <li>▪ Discontinue Medication</li> <li>▪ Coverage Gap Thresholds</li> <li>▪ Allergy Configuration</li> <li>▪ Import Measure Codes</li> </ul>
	Measure Definitions		<ul style="list-style-type: none"> <li>▪ Define a Medication Measure – dependent on a feed</li> </ul>
User Management	User	User Management	<ul style="list-style-type: none"> <li>▪ User → Create, View, Edit, Copy, Disable</li> </ul>
	Role Groups	User Management	<ul style="list-style-type: none"> <li>▪ Role Groups → Create, View, Edit, Copy, Disable</li> <li>▪ Custom vs OOB status</li> </ul>
	Roles	User Management	<ul style="list-style-type: none"> <li>▪ Role Library → Create, View, Edit, Copy, Disable</li> <li>▪ Custom vs OOB status</li> </ul>
	Teams	User Management	<ul style="list-style-type: none"> <li>▪ Teams Library → Create, View, Edit, Copy, Disable</li> </ul>
	Admin Groups	User Management The new HTML5 UI has the Old Admin permission verbiage.	<ul style="list-style-type: none"> <li>▪ Admin Groups → Create, View, Edit, Copy, Disable</li> <li>▪ Custom vs OOB status</li> </ul>
	Company Groups	User Management	<ul style="list-style-type: none"> <li>▪ Company Groups → Create, View, Edit, Add Child, Remove</li> </ul>
Member Management	Member Dashboard	System Management/ Global Configuration	<ul style="list-style-type: none"> <li>▪ Pod Display configuration</li> </ul>
	Member Demographics	System Management, User Management (Role Group), DCM (Customer SetUp → Member Details)	<ul style="list-style-type: none"> <li>▪ Member Information configuration</li> </ul>
	Member Reconciliation	Technical Configuration	<ul style="list-style-type: none"> <li>▪ Reconciliation settings</li> </ul>
	Member Search	Technical Configuration	<ul style="list-style-type: none"> <li>▪ Member Search settings</li> <li>▪ Member Search result Column Displays</li> </ul>

Main Menu	Secondary menu	Harman	Components
	Member Offline & Lock Timer	System Management/Global Configuration	<ul style="list-style-type: none"> <li>Member download limit</li> <li>Member offline lock time</li> </ul>
System Management	Data Management	System Management	<ul style="list-style-type: none"> <li>Data Feed Configuration and Execution</li> <li>Upload Management → File Size and File Extension Management</li> </ul>
	Environment Settings	System Management	<ul style="list-style-type: none"> <li>Environment naming and color</li> <li>Custom Logo</li> <li>TruActivity Configuration</li> <li>Localization</li> <li>Holiday calendar</li> </ul>
	Security Settings	System Management	<ul style="list-style-type: none"> <li>SSO/Single Sign On → Enable, Keystore configuration, IDP Configuration, TruCare Metadata Generator, Advanced Configuration, SSO Binding, Copy Meta Data to Clipboard</li> <li>LDAP → Synchronization</li> </ul>
	External Services	System Management (Third Party Configuration), DCM (Customer Setup)	<ul style="list-style-type: none"> <li>Custom URL → URL Creation, Key Generation, Enable, Disable</li> <li>UM Clinical Criteria → Enable/Disable Clinical Criteria source</li> <li>Collaborate → Collaborate Settings</li> <li>Findhelp Integration → Findhelp Settings Enable/Disable</li> <li>Health Literacy Content → Healthwise Settings Enable/Disable</li> <li>BRE External Services → External Service Creation, Enable, Disable</li> <li>Jump Page → Creation of a URL to be used for the jump page, Enable, Disable</li> <li>Analytics URL → Analytics URL Setting</li> <li>Claims System Destination → Claims Destination, Creation, Enable, Disable and Edit</li> <li>AI Models → AI Models Library Edit, Enable, Disable</li> </ul>
	User Notifications	System Management	<ul style="list-style-type: none"> <li>System Messages → System Messages Creation, Enable, View, Edit, Disable</li> <li>User Messages → Number Of Days to Display Setting</li> <li>Email Notification → Email Server notification, JOB configuration</li> </ul>
	Events	System Management	<ul style="list-style-type: none"> <li>Events Configuration → General configuration, Rabbit MQ configuration, SSL configuration, Enable Events, Task Events</li> </ul>

Main Menu	Secondary menu	Harman	Components
			<ul style="list-style-type: none"> <li>Change Data Capture Settings (CDC) → Enable CDC captures and set data</li> </ul>
	Update License	System Management	<ul style="list-style-type: none"> <li>Update license → Adding licenses and updating licenses</li> </ul>
Auditing	Logs By User	Auditing	<ul style="list-style-type: none"> <li>Log in and Log out data</li> <li>Activity per user</li> </ul>
	Logs By Member	Auditing	<ul style="list-style-type: none"> <li>Activity per member</li> </ul>
	HTML5 Logs By User	New	<ul style="list-style-type: none"> <li>Log in and Log out data</li> <li>Activity per user</li> </ul>
	HTML5Logs By Member	New	<ul style="list-style-type: none"> <li>Activity per member</li> </ul>
Provider Management	Provider Search	Technical Configuration, System Management	<ul style="list-style-type: none"> <li>Provider Simple Search Configuration</li> <li>Provider Search Settings</li> <li>Provider Participation Settings</li> </ul>
IMEX	Import Configuration	System Management	<ul style="list-style-type: none"> <li>Integration Export Configuration</li> <li>Export the Integration data</li> <li>Import the Integration Configuration</li> </ul>
	Export Configuration	System Management	<ul style="list-style-type: none"> <li>Application → Last Exported Version, Export Location, Log</li> <li>Integration → Last Exported Version, Export Location, Log</li> </ul>

## Consolidated Navigation Menu List

### Actions Library

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

**Table 1. Actions Library**

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Care Management→Care Plans→Actions Library	Care Management→Care Plans→Actions Library
Care Management→Care Plans→Actions Library→Create	Care Management→Care Plans→Actions Library→Create
Care Management→Care Plans→Actions Library→View	Care Management→Care Plans→Actions Library→View
Care Management→Care Plans→Actions Library→Create Version	Care Management→Care Plans→Actions Library→Create Version
Care Management→Care Plans→Actions Library→UnPublish Definition	Care Management→Care Plans→Actions Library→UnPublish Definition
Care Management→Care Plans→Actions Library→Copy	Care Management→Care Plans→Actions Library→Copy
Care Management→Care Plans→Actions Library→Edit	Care Management→Care Plans→Actions Library→Edit

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Care Management→Care Plans→Actions Library→Disable	Care Management→Care Plans→Actions Library→Disable
Care Management→Care Plans→Actions Library→View Version History	Care Management→Care Plans→Actions Library→View Version History

## Assessments

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

**Table 2. Assessments**

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Clinical Configuration→Assessments→Assessment Questions	Care Management→Assessments→Questions
Clinical Configuration→Assessment Questions→Create new Question	Care Management→Assessments→Questions→Create Question
Clinical Configuration→Assessment Questions→Create new Question	Care Management→Assessments→Questions→Create Question→Add Question
Clinical Configuration→Assessment Questions→Create new Question	Care Management→Assessments→Questions→Create Question→Add Question →Insert
Clinical Configuration→Assessment Questions→Create new Question →Edit Group	Care Management→Assessments→Questions→Create Question→Edit Group
Clinical Configuration→Assessment Questions→Create new Question →Copy Group	Care Management→Assessments→Questions→Create Question→Copy Group
Clinical Configuration→Assessment Questions→Create new Question →New Group	Care Management→Assessments→Questions→Create Question→New Group
Clinical Configuration→Assessment Questions→View Question	Care Management→Assessments→Questions→View Question
Clinical Configuration→Assessment Questions→View Question→View Version History	Care Management→Assessments→Questions→View Question→Version History→Details
Clinical Configuration→Assessment Questions→View Question→View Version History→Parent links tab	Care Management→Assessments→Questions→View Question→Version History→Parent links tab
Clinical Configuration→Assessment Questions→View Question→View Version History→Child links tab	Care Management→Assessments→Questions→View Question→Version History→Child links tab
Clinical Configuration→Assessment Questions→View Question	Care Management→Assessments→Questions→View Question

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Clinical Configuration→Assessment Questions→View Question→Version	Care Management→Assessments→Questions→View Question→Create Version
Clinical Configuration→Assessment Questions→View Question→Version	Care Management→Assessments→Questions→View Question→Create Version→Add Question
Clinical Configuration→Assessment Questions→View Question→Version	Care Management→Assessments→Questions→View Question→Create Version→Add Question→Insert
Clinical Configuration→Assessment Questions→View Question→Version →Edit Group	Care Management→Assessments→Questions→View Question→Create Version →Edit Group
Clinical Configuration→Assessment Questions→View Question→Version→Copy Group	Care Management→Assessments→Questions→View Question→Create Version →Copy Group
Clinical Configuration→Assessment Questions→View Question→Version→New Group	Care Management→Assessments→Questions→View Question→Create Version →New Group
Clinical Configuration→Assessment Questions→View Question→Edit Question	Care Management→Assessments→Questions→View Question→Edit Question
Clinical Configuration→Assessment Questions→View Question→Edit Question	Care Management→Assessments→Questions→View Question→Edit Question→Add Question
Clinical Configuration→Assessment Questions→View Question→Edit Question	Care Management→Assessments→Questions→View Question→Edit Question→Add Question→Insert
Clinical Configuration→Assessment Questions→View Question→Edit Question →Edit Group	Care Management→Assessments→Questions→View Question→Edit Question →Edit Group
Clinical Configuration→Assessment Questions→View Question→Edit Question→Copy Group	Care Management→Assessments→Questions→View Question→Edit Question →Copy Group
Clinical Configuration→Assessment Questions→View Question→Edit Question→New Group	Care Management→Assessments→Questions→View Question→Edit Question →New Group
Clinical Configuration→Assessment Questions→View Question→Edit Question→View Version History	Care Management→Assessments→Questions→View Question→Edit Question→Version History→Details
Clinical Configuration→Assessment Questions→View Question→Edit Question→View Version History→Parent links tab	Care Management→Assessments→Questions→View Question→Edit Question→Version History→Parent links tab
Clinical Configuration→Assessment Questions→View Question→Edit	Care Management→Assessments→Questions→View

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Question→View Version History→Child links tab	w Question→Edit Question→Version History→Child links tab
Clinical Configuration→Assessment Questions→View Question→Edit Question	Care Management→Assessments→Questions→View Question→Edit Question
Clinical Configuration→Assessment Questions→View Question→Edit Question	Care Management→Assessments→Questions→View Question→Edit Question
Clinical Configuration→Assessment Questions→Copy Question	Care Management→Assessments→Questions→Copy Question
Clinical Configuration→Assessment Questions→Copy Question	Care Management→Assessments→Questions→Copy Question→Add Question
Clinical Configuration→Assessment Questions→Copy Question	Care Management→Assessments→Questions→Copy Question→Add Question→Insert
Clinical Configuration→Assessment Questions→Copy Question →Edit Group	Care Management→Assessments→Questions→Copy Question→Edit Group
Clinical Configuration→Assessment Questions→Copy Question →Copy Group	Care Management→Assessments→Questions→Copy Question→Copy Group
Clinical Configuration→Assessment Questions→Copy Question →New Group	Care Management→Assessments→Questions→Copy Question→New Group
Clinical Configuration→Assessments→Assessment Question Groups	Care Management→Assessments→Question Groups
Clinical Configuration→Assessment Questions→View Question	Care Management→Assessments→Questions→View Question
Clinical Configuration→Assessment Questions→View Question	Care Management→Assessments→Questions→View Question
Clinical Configuration→Assessment Questions→View Question	Care Management→Assessments→Questions→View Question
Clinical Configuration→Assessment Questions→View Question	Care Management→Assessments→Questions→View Question
Clinical Configuration→Assessment Questions→View Question→View Version History	Care Management→Assessments→Questions→View Question→Version History→Details
Clinical Configuration→Assessment Questions→View Question→View Version History→Parent links tab	Care Management→Assessments→Questions→View Question→Version History→Parent links tab

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Clinical Configuration→Assessment Questions→View Question→View Version History→Child links tab	Care Management→Assessments→Questions→View Question→Version History→Child links tab
Clinical Configuration→Assessment Questions→View Question	Care Management→Assessments→Questions→View Question
Clinical Configuration→Assessment Questions→View Question	Care Management→Assessments→Questions→View Question
Clinical Configuration→Assessment Questions→View Question	Care Management→Assessments→Questions→View Question
Clinical Configuration→Assessment Question Groups→Create new Question Group	Care Management→Assessments→Question Groups→Create Question Group
Clinical Configuration→Assessment Question Groups→Create New Question Group→Add Question	Care Management→Assessments→Question Groups→Create Question Group→Add Question→Insert
Clinical Configuration→Assessment Question Groups→Create New Question Group→Add Question→Create New Question	Care Management→Assessments→Question Groups→Create Question Group→Create Question
Clinical Configuration→Assessment Question Groups→Create New Question Group→Add Question→Create New Question	Care Management→Assessments→Question Groups→Create Question Group→Create Question
Clinical Configuration→Assessment Question Groups→Create New Question Group→Add Question→Create New Question	Care Management→Assessments→Question Groups→Create Question Group→Create Question→Insert
Clinical Configuration→Assessment Question Groups→Create New Question Group→Add Question→Create New Question→Edit Group	Care Management→Assessments→Question Groups→Create Question Group→Create Question→Edit Group
Clinical Configuration→Assessment Question Groups→Create New Question Group→Add Question→Create New Question→Copy Group	Care Management→Assessments→Question Groups→Create Question Group→Create Question→Copy Group
Clinical Configuration→Assessment Question Groups→Create New Question Group→Add Question→Create New Question→New Group	Care Management→Assessments→Question Groups→Create Question Group→Create Question→New Group
Clinical Configuration→Assessment Question Groups→View Question Group	Care Management→Assessments→Question Groups→View Question Group
Clinical Configuration→Assessment Question Groups→View Question Group→View Version History	Care Management→Assessments→Question Groups→View Question Group→Version History→Details
Clinical Configuration→Assessment Question Groups→View Question Group→View Version History→Parent links tab	Care Management→Assessments→Question Groups→View Question Group→Version History→Parent links tab
Clinical Configuration→Assessment Question Groups→View Question Group→View Version History→Child links tab	Care Management→Assessments→Question Groups→View Question Group→Version History→Child links tab

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Clinical Configuration→Assessment Question Groups→View Question Group→Version	Care Management→Assessments→Question Groups→View Question Group→Create Version
Clinical Configuration→Assessment Question Groups→View Question Group→Version→Add Question	Care Management→Assessments→Question Groups→View Question Group→Add Question→Insert
Clinical Configuration→Assessment Question Groups→View Question Group→Version→Add Question→Create New Question	Care Management→Assessments→Question Groups→View Question Group→Create Question
Clinical Configuration→Assessment Question Groups→View Question Group→Version→Add Question→Create New Question	Care Management→Assessments→Question Groups→View Question Group→Create Question
Clinical Configuration→Assessment Question Groups→View Question Group→Version→Add Question→Create New Question	Care Management→Assessments→Question Groups→View Question Group→Create Question→Insert
Clinical Configuration→Assessment Question Groups→View Question Group→Version→Add Question→Create New Question→Edit Group	Care Management→Assessments→Question Groups→View Question Group→Create Question→Edit Group
Clinical Configuration→Assessment Question Groups→View Question Group→Version→Add Question→Create New Question→Copy Group	Care Management→Assessments→Question Groups→View Question Group→Create Question→Copy Group
Clinical Configuration→Assessment Question Groups→View Question Group→Version→Add Question→Create New Question→New Group	Care Management→Assessments→Question Groups→View Question Group→Create Question→New Group
Clinical Configuration→Assessment Question Groups→View Question Group→Edit Question Group	Care Management→Assessments→Question Groups→View Question Group→Edit Question Group
Clinical Configuration→Assessment Question Groups→View Question Group→Edit Question Group→Add Question	Care Management→Assessments→Question Groups→View Question Group→Edit Question Group→Add Question
Clinical Configuration→Assessment Question Groups→View Question Group→Edit Question Group→Add Question→Create New Question	Care Management→Assessments→Question Groups→View Question Group→Edit Question Group→Create Question
Clinical Configuration→Assessment Question Groups→View Question Group→Edit Question Group→Add Question→Create New Question	Care Management→Assessments→Question Groups→View Question Group→Edit Question Group→Create Question→Add Question
Clinical Configuration→Assessment Question Groups→View Question Group→Edit Question Group→Add Question→Create New Question→Insert	Care Management→Assessments→Question Groups→View Question Group→Edit Question Group→Create Question→Add Question→Insert
Clinical Configuration→Assessment Question Groups→View Question Group→Edit Question Group→Add Question→Create New Question→Edit Question→Edit Group	Care Management→Assessments→Question Groups→View Question Group→Edit Question Group→Create Question→Edit Group
Clinical Configuration→Assessment Question Groups→View Question Group→Edit Question Group→Add Question→Create New Question→Edit Question→Copy Group	Care Management→Assessments→Question Groups→View Question Group→Edit Question Group→Create Question→Copy Group

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Clinical Configuration→Assessment Question Groups→View Question Group→Edit Question Group→Add Question→Create New Question→Edit Question→New Group	Care Management→Assessments→Question Groups→View Question Group→Edit Question Group→Create Question→New Group
Clinical Configuration→Assessment Question Groups→View Question Group→Edit Question Group→Add Question→Create New Question→Edit Question→View Version History	Care Management→Assessments→Question Groups→View Question Group→Edit Question Group→Version History→Details
Clinical Configuration→Assessment Question Groups→View Question Group→Edit Question Group→View Version History→Parent links tab	Care Management→Assessments→Question Groups→View Question Group→Edit Question Group→Version History→Parent links tab
Clinical Configuration→Assessment Question Groups→View Question Group→Edit Question Group→View Version History→Child links tab	Care Management→Assessments→Question Groups→View Question Group→Edit Question Group→Version History→Child links tab
Clinical Configuration→Assessment Question Groups→View Question Group→Edit Question Group	Care Management→Assessments→Question Groups→View Question Group→Edit Question Group
Clinical Configuration→Assessment Question Groups→View Question Group→Edit Question Group	Care Management→Assessments→Question Groups→View Question Group→Edit Question Group
Clinical Configuration→Assessment Question Groups→View Question Group→Copy Question Group	Care Management→Assessments→Question Groups→Copy Question
Clinical Configuration→Assessment Question Groups→View Question Group→Copy Question Group	Care Management→Assessments→Question Groups→Copy Question→Add Question
Clinical Configuration→Assessment Question Groups→View Question Group→Copy Question Group	Care Management→Assessments→Question Groups→Copy Question→Add Question→Insert
Clinical Configuration→Assessment Question Groups→View Question Group→Copy Question Group→Edit Group	Care Management→Assessments→Question Groups→Copy Question→Edit Group
Clinical Configuration→Assessment Question Groups→View Question Group→Copy Question Group→Copy Group	Care Management→Assessments→Question Groups→Copy Question→Copy Group
Clinical Configuration→Assessment Question Groups→View Question Group→Copy Question Group→New Group	Care Management→Assessments→Question Groups→Copy Question→New Group
Clinical Configuration→Assessments	Care Management→Assessments
Clinical Configuration→Assessment→View Assessments	Care Management→Assessments→View Assessments
Clinical Configuration→Assessment→View Assessments→View Version History	Care Management→Assessments→View Assessments→Version History
Clinical Configuration→Assessment→View Assessments→View Version History→Parent links tab	Care Management→Assessments→View Assessments→Version History→Parent links tab

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Clinical Configuration→Assessment→View Assessments→View Version History→Child links tab	Care Management→Assessments→View Assessments→Version History→Child links tab
Clinical Configuration→Assessment→Create Assessments	Care Management→Assessments→Create Assessments
Clinical Configuration→Assessment→Create Assessments→Add Question Groups	Care Management→Assessments→Create Assessments→Add Question Group
Clinical Configuration→Assessment→Create Assessments→Create Question Groups	Care Management→Assessments→Create Assessments→Create Question Group
Clinical Configuration→Assessment→Create Assessments→Add Note Definitions	Care Management→Assessments→Create Assessments→Add Note Definitions
Clinical Configuration→Assessment→Edit Assessments	Care Management→Assessments→Edit Assessments→Create Question Group
Clinical Configuration→Assessment→Edit Assessments→Add Question Groups	Care Management→Assessments→Edit Assessments→Add Question Group
Clinical Configuration→Assessment→Edit Assessments→Create Question Groups	Care Management→Assessments→Edit Assessments→Create Question Group
Clinical Configuration→Assessment→Edit Assessments→Add Note Definitions	Care Management→Assessments→Edit Assessments→Add Note Definitions
Clinical Configuration→Assessment→Copy Assessments	Care Management→Assessments→Edit Assessments→Create Question Group
Clinical Configuration→Assessment→Copy Assessments→Add Question Groups	Care Management→Assessments→Edit Assessments→Add Question Group
Clinical Configuration→Assessment→Copy Assessments→Create Question Groups	Care Management→Assessments→Edit Assessments→Create Question Group
Clinical Configuration→Assessment→Copy Assessments→Add Note Definitions	Care Management→Assessments→Edit Assessments→Add Note Definitions
Clinical Configuration→Assessment→View Assessments→Create Version	Care Management→Assessments→View Assessments→Create Version
Clinical Configuration→Assessment→View Assessments→Create Version→Add Question Groups	Care Management→Assessments→View Assessments→Create Version→Add Question Group
Clinical Configuration→Assessment→View Assessments→Create Version→Create Question Groups	Care Management→Assessments→View Assessments→Create Version→Create Question Group
Clinical Configuration→Assessment→View Assessments→Create Version→Add Note Definitions	Care Management→Assessments→View Assessments→Create Version→Add Note Definitions

## Auditing

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

**Table 3. Auditing**

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Auditing →Logs by User	Auditing →Logs by User

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Auditing →Logs by User	Auditing →Logs by User
Auditing →Logs by User	Auditing →Logs by User
Auditing →Logs by User	Auditing →Logs by User
Auditing →Logs by Member	Auditing →Logs by Member
Auditing →Logs by Member	Auditing →Logs by Member
Auditing →Logs by Member	Auditing →Logs by Member
Auditing →Logs by Member	Auditing →Logs by Member
Auditing →HTML5 Logs by User	Auditing →HTML5 Logs by User
Auditing →HTML5 Logs by User	Auditing →HTML5 Logs by User
Auditing →HTML5 Logs by User	Auditing →HTML5 Logs by User
Auditing →HTML5 Logs by User	Auditing →HTML5 Logs by User
Auditing →HTML5 Logs by Member	Auditing →HTML5 Logs by Member
Auditing →HTML5 Logs by Member	Auditing →HTML5 Logs by Member
Auditing →HTML5 Logs by Member	Auditing →HTML5 Logs by Member
Auditing →HTML5 Logs by Member	Auditing →HTML5 Logs by Member

## Business Hierarchy

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

**Table 4. Business Heirarchy**

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Distributed Correspondence Management→Business Hierarchy→Primary Entity	Line of Business→Business Hierarchy→Primary Entity
Distributed Correspondence Management→Business Hierarchy→Primary Entity→Line of Business 1	Line of Business→Business Hierarchy→Primary Entity→Line of Business 1
Distributed Correspondence Management→Business Hierarchy→Primary Entity→Line of Business 1	Line of Business→Business Hierarchy→Primary Entity→Line of Business 1
Distributed Correspondence Management→Business Hierarchy→Primary Entity→Line of Business 1→Employer	Line of Business→Business Hierarchy→Primary Entity→Line of Business 1→Employer
Distributed Correspondence Management→Business Hierarchy→Primary Entity→Line of Business 1→Employer→Sub-region	Line of Business→Business Hierarchy→Primary Entity→Line of Business 1→Employer→Sub-region
Distributed Correspondence Management→Business Hierarchy→Primary Entity→Line of Business 1→Employer→Sub-region→Division	Line of Business→Business Hierarchy→Primary Entity→Line of Business 1→Employer→Sub-region→Division
Distributed Correspondence Management→Business Hierarchy→Primary Entity→Line of Business 1→Employer→Sub-region→Division→Function	Line of Business→Business Hierarchy→Primary Entity→Line of Business 1→Employer→Sub-region→Division→Function

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Distributed Correspondence Management→Business Hierarchy→Primary Entity→Line of Business 2	Line of Business→Business Hierarchy→Primary Entity→Line of Business 2
Distributed Correspondence Management→Business Hierarchy→Primary Entity→Line of Business 2→Region	Line of Business→Business Hierarchy→Primary Entity→Line of Business 2→Region
Distributed Correspondence Management→Business Hierarchy→Primary Entity→Line of Business 2→Region→Product	Line of Business→Business Hierarchy→Primary Entity→Line of Business 2→Region→Product
Distributed Correspondence Management→Business Hierarchy→Primary Entity→Line of Business 2→Region→Product→Risk population	Line of Business→Business Hierarchy→Primary Entity→Line of Business 2→Region→Product→Risk population

## Care Plans

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

**Table 5. Care Plans**

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Care Management→Care Plans →Care Plans Library	Care Management→Care Plans →Care Plans Library
Care Management→Care Plans →Care Plans Library→Create	Care Management→Care Plans →Care Plans Library→Create
Care Management→Care Plans →Care Plans Library→View	Care Management→Care Plans →Care Plans Library→View
Care Management→Care Plans →Care Plans Library→Create Version	Care Management→Care Plans →Care Plans Library→Create Version
Care Management→Care Plans →Care Plans Library→UnPublish Definition	Care Management→Care Plans →Care Plans Library→UnPublish Definition
Care Management→Care Plans →Care Plans Library→Copy	Care Management→Care Plans →Care Plans Library→Copy
Care Management→Care Plans →Care Plans Library→Edit	Care Management→Care Plans →Care Plans Library→Edit
Care Management→Care Plans →Care Plans Library→Disable	Care Management→Care Plans →Care Plans Library→Disable
Care Management→Care Plans →Care Plans Library→View Version History	Care Management→Care Plans →Care Plans Library→View Version History
Care Management→Care Plans →Care Plans Library→Parent Links	Care Management→Care Plans →Care Plans Library→Parent Links
Care Management→Care Plans →Care Plans Library→Child Links	Care Management→Care Plans →Care Plans Library→Child Links
Care Management→Care Plans →Care Plans Library→Preview Updates	Care Management→Care Plans →Care Plans Library→Preview Updates

# Correspondence

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

**Table 6. Correspondence**

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Clinical Configuration →Correspondence →Template	Core Configuration →Correspondence →Template
Clinical Configuration →Correspondence →Create Template	Core Configuration →Correspondence →Create Template
Clinical Configuration →Correspondence →Actions	Core Configuration →Correspondence →Create Template →Actions
Clinical Configuration →Correspondence →Copy	Core Configuration →Correspondence →Create Template →Action button →EllipsisPic →Copy
Clinical Configuration →Correspondence →Copy Version	Core Configuration →Correspondence →Create Template →Action button → EllipsisPic →Copy Version
Clinical Configuration →Correspondence →Edit	Core Configuration →Correspondence →Create Template →Action button → EllipsisPic →Edit
Clinical Configuration →Correspondence →Rule Summary	Core Configuration →Correspondence →Rule Summary
Clinical Configuration →Correspondence →Create Rule	Core Configuration →Correspondence →Create Rule
Clinical Configuration →Correspondence →Rule Summary	Core Configuration →Correspondence →Actions
Clinical Configuration →Correspondence →View	Core Configuration →Correspondence →View
Clinical Configuration →Correspondence →Edit	Core Configuration →Correspondence →Edit
Clinical Configuration →User Defined Tag	Core Configuration →Correspondence →User Defined Tag
Clinical Configuration →User Defined Tag →Create User defined	Core Configuration →Correspondence →Create Tag
Clinical Configuration →User Defined Tag →Actions	Core Configuration →Correspondence →User Defined Tag →Actions
Clinical Configuration →User Defined Tag →View	Core Configuration →Correspondence →User Defined Tag →View
Clinical Configuration →User Defined Tag	Core Configuration →Correspondence →User Defined Tag →Edit
Clinical Configuration →Library document	Core Configuration →Correspondence →Library document
Clinical Configuration →Library Document →Create Library document	Core Configuration →Correspondence →Library Document →Create Library document
Clinical Configuration →Library Document →Action	Core Configuration →Correspondence →Library Document →Action

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Clinical Configuration →Library Document →View	Core Configuration →Correspondence →Library Document →View
Clinical Configuration →Library Document →Edit	Core Configuration →Correspondence →Library Document →Edit

## Cost Savings Events

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

**Table 7. Drop-Down Values**

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Technical Configuration →Cost Savings Events	Core Configuration →Cost Savings Events
Technical Configuration →Cost Savings Events →View Cost Savings Events	Core Configuration →Cost Savings Events →Action →View
Technical Configuration →Cost Savings Events →View Cost Savings Events	Core Configuration →Cost Savings Events →Action →Edit
Technical Configuration →Cost Savings Events →View Cost Savings Events →Edit	Core Configuration →Cost Savings Events →Action →Edit
Technical Configuration →Cost Savings Events →View Cost Savings Events →Edit	Core Configuration →Cost Savings Events →Action →Edit

## Distributed Correspondence Management (DCM)

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

**Table 8. Distributed Correspondence Management (DCM)**

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Distributed Correspondence Management→Customer Setup→Primary Entity→License Feature→UM	Line of Business→Customer Setup→Primary Entity→UM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→License Feature→UM	Line of Business→Customer Setup→Primary Entity→Line of Business 1→License Feature→UM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→License Feature→UM	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→License Feature→UM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→License Feature→UM	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→License Feature→UM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→License Feature→UM	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→License Feature→UM

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→Function→License Feature→UM	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→Function→License Feature→UM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→License Feature→UM	Line of Business→Customer Setup→Primary Entity→Line of Business 2→License Feature→UM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→Region→License Feature→UM	Line of Business→Customer Setup→Primary Entity→Line of Business 2→Region→License Feature→UM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→Region→Product→License Feature→UM	Line of Business→Customer Setup→Primary Entity→Line of Business 2→Region→Product→License Feature→UM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→Region→Product→Risk Population→License Feature→UM	Line of Business→Customer Setup→Primary Entity→Line of Business 2→Region→Product→Risk Population→License Feature→UM
Distributed Correspondence Management→Customer Setup→Primary Entity→License Feature→CM	Line of Business→Customer Setup→Primary Entity→CM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→License Feature→CM	Line of Business→Customer Setup→Primary Entity→Line of Business 1→License Feature→CM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→License Feature→CM	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→License Feature→CM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→License Feature→CM	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→License Feature→CM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→License Feature→CM	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→License Feature→CM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→Function→License Feature→CM	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→Function→License Feature→CM

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→License Feature→CM	Line of Business→Customer Setup→Primary Entity→Line of Business 2→License Feature→CM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→Region→License Feature→CM	Line of Business→Customer Setup→Primary Entity→Line of Business 2→Region→License Feature→CM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→Region→Product→License Feature→CM	Line of Business→Customer Setup→Primary Entity→Line of Business 2→Region→Product→License Feature→CM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→Region→Product→Risk Population→License Feature→CM	Line of Business→Customer Setup→Primary Entity→Line of Business 2→Region→Product→Risk Population→License Feature→CM
Distributed Correspondence Management→Customer Setup→Primary Entity→License Feature→DM	Line of Business→Customer Setup→Primary Entity→DM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→License Feature→DM	Line of Business→Customer Setup→Primary Entity→Line of Business 1→License Feature→DM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→License Feature→DM	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→License Feature→DM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→License Feature→DM	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→License Feature→DM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→License Feature→DM	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→License Feature→DM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→Function→License Feature→DM	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→Function→License Feature→DM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→License Feature→DM	Line of Business→Customer Setup→Primary Entity→Line of Business 2→License Feature→DM
Distributed Correspondence Management→Customer Setup→Primary	Line of Business→Customer Setup→Primary Entity→Line of Business 2→Region→License Feature→DM

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Entity→Line of Business 2→Region→License Feature→DM	
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→Region→Product→License Feature→DM	Line of Business→Customer Setup→Primary Entity→Line of Business 2→Region→Product→License Feature→DM
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→Region→Product→Risk Population→License Feature→DM	Line of Business→Customer Setup→Primary Entity→Line of Business 2→Region→Product→Risk Population→License Feature→DM
Distributed Correspondence Management→Customer Setup→Primary Entity→License Feature→HCS	Line of Business→Customer Setup→Primary Entity→HCS
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→License Feature→HCS	Line of Business→Customer Setup→Primary Entity→Line of Business 1→License Feature→HCS
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→License Feature→HCS	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→License Feature→HCS
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→License Feature→HCS	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→License Feature→HCS
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→License Feature→HCS	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→License Feature→HCS
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→Function→License Feature→HCS	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→Function→License Feature→HCS
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→License Feature→HCS	Line of Business→Customer Setup→Primary Entity→Line of Business 2→License Feature→HCS
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→Region→License Feature→HCS	Line of Business→Customer Setup→Primary Entity→Line of Business 2→Region→License Feature→HCS
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→Region→Product→License Feature→HCS	Line of Business→Customer Setup→Primary Entity→Line of Business 2→Region→Product→License Feature→HCS

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→Region→Product→Risk Population→License Feature→HCS	Line of Business→Customer Setup→Primary Entity→Line of Business 2→Region→Product→Risk Population→License Feature→HCS
Distributed Correspondence Management→Customer Setup→Primary Entity→License Feature→Generic	Line of Business→Customer Setup→Primary Entity→Generic
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→License Feature→Generic	Line of Business→Customer Setup→Primary Entity→Line of Business 1→License Feature→Generic
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→License Feature→Generic	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→License Feature→Generic
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→License Feature→Generic	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→License Feature→Generic
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→License Feature→Generic	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→License Feature→Generic
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→Function→License Feature→Generic	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→Function→License Feature→Generic
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→License Feature→Generic	Line of Business→Customer Setup→Primary Entity→Line of Business 2→License Feature→Generic
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→Region→License Feature→Generic	Line of Business→Customer Setup→Primary Entity→Line of Business 2→Region→License Feature→Generic
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→Region→Product→License Feature→Generic	Line of Business→Customer Setup→Primary Entity→Line of Business 2→Region→Product→License Feature→Generic
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→Region→Product→Risk Population→License Feature→Generic	Line of Business→Customer Setup→Primary Entity→Line of Business 2→Region→Product→Risk Population→License Feature→Generic

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Distributed Correspondence Management→Customer Setup→Primary Entity→License Feature→AAG	Line of Business→Customer Setup→Primary Entity→AAG
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→License Feature→AAG	Line of Business→Customer Setup→Primary Entity→Line of Business 1→License Feature→AAG
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→License Feature→AAG	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→License Feature→AAG
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→License Feature→AAG	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→License Feature→AAG
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→License Feature→AAG	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→License Feature→AAG
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→Function→License Feature→AAG	Line of Business→Customer Setup→Primary Entity→Line of Business 1→Employer→Sub-region→Division→Function→License Feature→AAG
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→License Feature→AAG	Line of Business→Customer Setup→Primary Entity→Line of Business 2→License Feature→AAG
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→Region→License Feature→AAG	Line of Business→Customer Setup→Primary Entity→Line of Business 2→Region→License Feature→AAG
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→Region→Product→License Feature→AAG	Line of Business→Customer Setup→Primary Entity→Line of Business 2→Region→Product→License Feature→AAG
Distributed Correspondence Management→Customer Setup→Primary Entity→Line of Business 2→Region→Product→Risk Population→License Feature→AAG	Line of Business→Customer Setup→Primary Entity→Line of Business 2→Region→Product→Risk Population→License Feature→AAG

## Drop-Down Values

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

Table 9. Drop-Down Values

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Technical Configuration →Drop-Down Values →Summary	Core Configuration →Drop-Down Values →Summary
Technical Configuration →Drop-Down Values →Summary	Core Configuration →Drop-Down Values →Summary
Technical Configuration →Drop-Down Values →Summary	Core Configuration →Drop-Down Values →Summary
Technical Configuration →Drop-Down Values →Summary	Core Configuration →Drop-Down Values →Summary
Technical Configuration →Drop-Down Values →Summary	Core Configuration →Drop-Down Values →Summary
Technical Configuration →Drop-Down Values →Summary	Core Configuration →Drop-Down Values →Summary
Technical Configuration →Drop-Down Values →Import CSV	Core Configuration →Drop-Down Values →Summary → EllipsisPic →import button →import slider display
Technical Configuration →Drop-Down Values →Import CSV	Core Configuration →Drop-Down Values →Summary → EllipsisPic →import button →import slider display
Technical Configuration →Drop-Down Values →Import CSV	Core Configuration →Drop-Down Values →Summary → EllipsisPic →import button →import slider display
Technical Configuration →Drop-Down Values →Export CSV	Core Configuration →Drop-Down Values →Summary → EllipsisPic →Export Button →Export Slider Display
Technical Configuration →Drop-Down Values →Export CSV	Core Configuration →Drop-Down Values →Summary → EllipsisPic →Export Button →Export Slider Display
Technical Configuration →Drop-Down Values →Summary →Configure Field	Core Configuration →Drop-Down Values →Summary →Actions → EllipsisPic →View
Technical Configuration →Drop-Down Values →Summary →Configure Field	Core Configuration →Drop-Down Values →Summary →Actions → EllipsisPic →View
Technical Configuration →Drop-Down Values →Summary →Configure Field →Edit	Core Configuration →Drop-Down Values →Summary →Actions → EllipsisPic →Edit
Technical Configuration →Drop-Down Values →Summary →Configure Field →Edit	Core Configuration →Drop-Down Values →Summary →Actions → EllipsisPic →Edit
Technical Configuration →Drop-Down Values →Summary →Configure Field →Edit	Core Configuration →Drop-Down Values →Summary →Actions → EllipsisPic →Edit
Technical Configuration →Drop-Down Values →Summary →Configure Field →Edit	Core Configuration →Drop-Down Values →Summary →Actions → EllipsisPic →Edit
Technical Configuration →Drop-Down Values →Summary →Configure Field →Edit	Core Configuration →Drop-Down Values →Summary →Actions → EllipsisPic →Edit
Technical Configuration →Drop-Down Values →Summary →Configure Field →Edit	Core Configuration →Drop-Down Values →Summary →Actions → EllipsisPic →Edit
Technical Configuration →Drop-Down Values →Summary →Configure Field →Edit	Core Configuration →Drop-Down Values →Summary →Actions → EllipsisPic →Edit

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Technical Configuration → Drop-Down Values → Summary → Edit Values	Core Configuration → Drop-Down Values → Summary → Actions → EllipsisPic → Edit Values Section → EllipsisPic → Add New Row
Technical Configuration → Drop-Down Values → Summary → Edit Values	Core Configuration → Drop-Down Values → Summary → Actions → EllipsisPic → Edit Values Section → EllipsisPic → Add New Row
Technical Configuration → Drop-Down Values → Summary → Edit Values	Core Configuration → Drop-Down Values → Summary → Actions → EllipsisPic → Edit Values Section → EllipsisPic → Add New Row
Technical Configuration → Drop-Down Values → Summary → Edit Values	Core Configuration → Drop-Down Values → Summary → Actions → EllipsisPic → Edit Values Section → EllipsisPic → Add New Row
Technical Configuration → Drop-Down Values → Summary → Edit Values	Core Configuration → Drop-Down Values → Summary → Actions → EllipsisPic → Edit Values Section → EllipsisPic → Disable Toggle Button
Technical Configuration → Drop-Down Values → Summary → Edit Values	Core Configuration → Drop-Down Values → Summary → Actions → EllipsisPic → Edit Values Section → EllipsisPic → Disable Toggle Button

## Feature Matrix

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

**Table 10. Feature Matrix**

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Distributed Correspondence Management → Feature Matrix → Primary Entity	Line of Business → Feature Matrix → Primary Entity
Distributed Correspondence Management → Feature Matrix → Primary Entity → Line of Business 1	Line of Business → Feature Matrix → Primary Entity → Line of Business 1
Distributed Correspondence Management → Feature Matrix → Primary Entity → Line of Business 1 → Employer	Line of Business → Feature Matrix → Primary Entity → Line of Business 1 → Employer
Distributed Correspondence Management → Feature Matrix → Primary Entity → Line of Business 1 → Employer → Sub- region	Line of Business → Feature Matrix → Primary Entity → Line of Business 1 → Employer → Sub- region
Distributed Correspondence Management → Feature Matrix → Primary Entity → Line of Business 1 → Employer → Sub- region → Division	Line of Business → Feature Matrix → Primary Entity → Line of Business 1 → Employer → Sub- region → Division
Distributed Correspondence Management → Feature Matrix → Primary Entity → Line of Business 1 → Employer → Sub- region → Division → Function	Line of Business → Feature Matrix → Primary Entity → Line of Business 1 → Employer → Sub- region → Division → Function

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Distributed Correspondence Management→Feature Matrix→Primary Entity→Line of Business 2	Line of Business→Feature Matrix→Primary Entity→Line of Business 2
Distributed Correspondence Management→Feature Matrix→Primary Entity→Line of Business 1→Region	Line of Business→Feature Matrix→Primary Entity→Line of Business 1→Region
Distributed Correspondence Management→Feature Matrix→Primary Entity→Line of Business 1→Region→Product	Line of Business→Feature Matrix→Primary Entity→Line of Business 1→Region→Product
Distributed Correspondence Management→Feature Matrix→Primary Entity→Line of Business 1→Region→Product→Risk population	Line of Business→Feature Matrix→Primary Entity→Line of Business 1→Region→Product→Risk population

## Key Metrics

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

**Table 11. Key Metrics**

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Clinical Configuration →Key Metrics	Core Configuration →Key Metrics
Clinical Configuration →Key Metrics →Create New key metrics definition	Core Configuration →Key Metrics →Create Key Metric Definition
Clinical Configuration →Key Metrics →View Key Metrics	Core Configuration →Key Metrics →Action →View
Clinical Configuration →Key Metrics →Copy	Core Configuration →Key Metrics →Action →Copy
Clinical Configuration →Key Metrics →View Key Metrics →Edit	Core Configuration →Key Metrics →Action →Edit

## Notes

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

**Table 12. Notes**

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Clinical Configuration →Notes	Core Configuration →Notes
Clinical Configuration →Notes →Create Note	Core Configuration →Notes →Create Note
Clinical Configuration →Notes →Actions	Core Configuration →Notes →Actions
Clinical Configuration →Notes →View	Core Configuration →Notes →View
Clinical Configuration →Notes →Edit	Core Configuration →Notes →Edit
Clinical Configuration →Notes →copy	Core Configuration →Notes →Copy

## Objectives Library

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

Table 13. Objectives Library

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Care Management→Care Plans→Objectives Library	Care Management→Care Plans→Objectives Library
Care Management→Care Plans→Objectives Library→Create	Care Management→Care Plans→Objectives Library→Create
Care Management→Care Plans→Objectives Library→View	Care Management→Care Plans→Objectives Library→View
Care Management→Care Plans→Objectives Library→Create Version	Care Management→Care Plans→Objectives Library→Create Version
Care Management→Care Plans→Objectives Library→UnPublish Definition	Care Management→Care Plans→Objectives Library→UnPublish Definition
Care Management→Care Plans→Objectives Library→Copy	Care Management→Care Plans→Objectives Library→Copy
Care Management→Care Plans→Objectives Library→Edit	Care Management→Care Plans→Objectives Library→Edit
Care Management→Care Plans→Objectives Library→Disable	Care Management→Care Plans→Objectives Library→Disable
Care Management→Care Plans→Objectives Library→View Version History	Care Management→Care Plans→Objectives Library→View Version History
Care Management→Care Plans→Objectives Library→Parent Links	Care Management→Care Plans→Objectives Library→Parent Links
Care Management→Care Plans→Objectives Library→Child Links	Care Management→Care Plans→Objectives Library→Child Links
Care Management→Care Plans→Objectives Library→Preview Updates	Care Management→Care Plans→Objectives Library→Preview Updates

## Problems Library

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

Table 14. Problems Library

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Care Management→Care Plans→Problems Library	Care Management→Care Plans→Problems Library
Care Management→Care Plans→Problems Library→Create	Care Management→Care Plans→Problems Library→Create
Care Management→Care Plans→Problems Library→View	Care Management→Care Plans→Problems Library→View
Care Management→Care Plans→Problems Library→Create Version	Care Management→Care Plans→Problems Library→Create Version
Care Management→Care Plans→Problems Library→UnPublish Definition	Care Management→Care Plans→Problems Library→UnPublish Definition
Care Management→Care Plans→Problems Library→Copy	Care Management→Care Plans→Problems Library→Copy
Care Management→Care Plans→Problems Library→Edit	Care Management→Care Plans→Problems Library→Edit

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Care Management→Care Plans→Problems Library→Disable	Care Management→Care Plans→Problems Library→Disable
Care Management→Care Plans→Problems Library→View Version History	Care Management→Care Plans→Problems Library→View Version History
Care Management→Care Plans→Problems Library→Parent Links	Care Management→Care Plans→Problems Library→Parent Links
Care Management→Care Plans→Problems Library→Child Links	Care Management→Care Plans→Problems Library→Child Links
Care Management→Care Plans→Problems Library→Preview Updates	Care Management→Care Plans→Problems Library→Preview Updates

## Product Features

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

**Table 15. Product Feature**

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Clinical Configuration →Product Features →Product Feature Library	Core Configuration →Product Feature Library
Clinical Configuration →Product Features →Product Feature Library	Core Configuration →Product Feature Library
Clinical Configuration →Product Features →Product Feature Library	Core Configuration →Product Feature Library
Clinical Configuration →Product Features →Product Feature Library	Core Configuration →Product Feature Library
Clinical Configuration →Feature Services →Feature Service Library	Core Configuration →Feature Service Library
Clinical Configuration →Feature Services →Feature Service Library	Core Configuration →Feature Service Library

## Program Matrix

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

**Table 16. Program Matrix**

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Distributed Correspondence Management→Member Filter	Line of Business→Member Filter

## Schema Hierarchy

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

Table 17. Schema Hierarchy

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Distributed Correspondence Management→Schema Hierarchy→Primary Entity	Line of Business→Schema Hierarchy→Primary Entity
Distributed Correspondence Management→Schema Hierarchy→Primary Entity→Line of Business	Line of Business→Schema Hierarchy→Primary Entity→Line of Business
Distributed Correspondence Management→Schema Hierarchy→Primary Entity→Line of Business→EMPLOYER	Line of Business→Schema Hierarchy→Primary Entity→Line of Business→EMPLOYER
Distributed Correspondence Management→Schema Hierarchy→Primary Entity→Line of Business→EMPLOYER→SUB-REGION	Line of Business→Schema Hierarchy→Primary Entity→Line of Business→EMPLOYER→SUB-REGION
Distributed Correspondence Management→Schema Hierarchy→Primary Entity→Line of Business→EMPLOYER→SUB-REGION→DIVISION	Line of Business→Schema Hierarchy→Primary Entity→Line of Business→EMPLOYER→SUB-REGION→DIVISION
Distributed Correspondence Management→Schema Hierarchy→Primary Entity→Line of Business→EMPLOYER→SUB-REGION→DIVISION→FUNCTION	Line of Business→Schema Hierarchy→Primary Entity→Line of Business→EMPLOYER→SUB-REGION→DIVISION→FUNCTION
Distributed Correspondence Management→Schema Hierarchy→Primary Entity→Line of Business→REGION	Line of Business→Schema Hierarchy→Primary Entity→Line of Business→REGION
Distributed Correspondence Management→Schema Hierarchy→Primary Entity→Line of Business→REGION→PRODUCT	Line of Business→Schema Hierarchy→Primary Entity→Line of Business→REGION→PRODUCT
Distributed Correspondence Management→Schema Hierarchy→Primary Entity→Line of Business→REGION→PRODUCT→RISK POPULATION	Line of Business→Schema Hierarchy→Primary Entity→Line of Business→REGION→PRODUCT→RISK POPULATION

## User Defined Fields

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

Table 18. User Defined Fields

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Core Configuration→User Defined Fields	Core Configuration→User Defined Fields
Core Configuration→User Defined Fields→Import User Defined Fields	Core Configuration→User Defined Fields→Import User Defined Fields
Core Configuration→User Defined Fields→Export User Defined Fields	Core Configuration→User Defined Fields→Export User Defined Fields

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
Core Configuration→User Defined Fields→Edit UDF Screen Ordering	Core Configuration→User Defined Fields→Edit UDF Screen Ordering
Core Configuration→User Defined Fields→Create User Defined Fields	Core Configuration→User Defined Fields→Create User Defined Fields

## User Management

This table compares the previous TruCare Admin Navigation Menu (up to version 24.2) with the updated TruCare Admin 25.1 Navigation Menu structure.

**Table 19. User Management**

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
User Management	User Management →Users →Users Library
User Management →Create User	User Management →Users →Users Library →Create User
User Management →View	User Management →Users →Users Library →View
User Management →View →Edit	User Management →Users →Users Library →Edit
	User Management →Users →Users Library →Copy
User Management →Roles Groups Management →Summary Screen	User Management →Role Groups →Summary Screen
User Management →Roles Groups Management →Create New Role Group	User Management →Role Groups →Create New Role Group
User Management →Roles Groups Management →View	User Management →Role Group →View
User Management →Roles Groups Management →Edit	User Management →Roles Group →Edit
	User Management →Roles Group →Copy
User Management →Role Management →Summary Screen	User Management →Roles →Summary Screen
User Management →Role Management →Create New Role Group	User Management →Roles →Create New Role Group
User Management →Role Management →View	User Management →Roles →View
User Management →Role Management →Edit	User Management →Roles →Edit
	User Management →Roles →Copy
User Management →Teams Management →Summary Screen	User Management →Teams →Summary Screen
User Management →Teams Management →Create New Team	User Management →Teams →Create New Team
User Management →Teams Management →View	User Management →Teams →View
User Management →Teams Management →Edit	User Management →Teams →Edit

TruCare Admin Navigation Menu till 24.2	TruCare Admin 25.1 Navigation Menu Structure
User Management →Admin Company Group Management →Summary Screen	User Management →Admin Groups →Summary Screen
User Management →Admin Company Group Management →Create New Admin Group	User Management →Admin Groups →Create Admin Group
User Management →Admin Group Management →View	User Management →Admin Groups →View
User Management →Admin Group Management →Edit	User Management →Admin Groups →Edit
User Management →Company Group Management →Summary Screen	User Management →Company Groups →Summary Screen
User Management →Company Group Management →Primary Company Group	User Management →Company Groups →Primary Company Group
User Management →Company Group Management →View	User Management →Company Groups →View
User Management →Company Group Management →Edit	User Management →Company Groups →Edit
User Management →Company Group Management →Add Child	User Management →Company Groups →Add Child

## Using the system

This chapter covers the basics of how to log in to TruCare Admin and how to navigate the application.

### Browser support

TruCare runs on a web browser. Windows display set at 100%, with 1920 x 1080 display resolution is required.

For information on the supported web browsers and display resolutions, refer to the [TruCare User Guide](#) and the [Third Party Support Matrix](#).



#### Note

TruCare no longer supports the Harman browser starting with the TruCare v25.1 release.

### Dark Mode support

The TruCare portal supports dark mode, so you may browse with a dark theme by default or by enabling it in your system settings.

### Supported characters in text fields

Characters in the Latin 1 character set are supported in text fields.

Examples of text fields include **First Name** and **Last Name**. Text fields do not support emojis or symbols not found in the Latin 1 character set.

Refer to [Code Page 1252 Windows Latin 1 \(ANSI\)](#) for the Latin 1 character set list.

### Log in to TruCare Admin

TruCare Admin version 25.1 runs smoothly on most modern browsers and all major operating systems, ensuring a seamless user experience across different devices and platforms. To view the list of supported browsers, navigate to [Third Party Support Matrix > Supported Browsers](#)

To login to TruCare Admin version 25.1

1. Navigate to <Your-Organization-Domain>/trucare-admin/login.
2. Enter your Username and Password.
  - To save your login information, enable the Remember Me option.
3. Click Login.

The TruCare Admin version 25.1 Dashboard page is displayed.

To view the online help from TruCare Admin, use a standard browser like Google Chrome™ browser to access the online documentation site: <https://documentation.zyter.com/main/v25.1/>.

## Top Menu bar

The administrative dashboard has a top menu bar, which is available from all screens in TruCare Admin.

The top menu bar includes the User account name, Help, About, and the Logout button.

## Administrator permissions

Your ability to view and edit in TruCare Admin depends on your Administrator permissions.

These permissions are specified when your account is created in User Management → Roles.

## Permissions

- Only users with permission to access the Audit Log can see the Audit Log option on the main menu.
- Only users with permission to access a member's BHP can search for or select that member.
- Only users with permission to access a member's BHP can view that member in the activity log.

## Administrator and User permissions

The TruCare administrator modifies the permissions for each screen and component by updating the Admin Group settings. These settings determine whether the user can access the following features in the Actions column:

- View
- Edit
- Copy
- Enable or Disable

# Line of Business

**Line of Business:** The Line of Business component provides the tools that form the functional infrastructure TruCare uses to model customer organizations' care management operations. It allows users to create healthcare initiatives tailored to the unique needs of individual member populations.

## Schema Hierarchy

The Schema Hierarchy replicates your business structure in TruCare. During implementation, the TruCare implementation team helps configure the hierarchy. The Primary Entity, which represents the actual Care Management Organization, sits at the top of the Schema Hierarchy.

Including the Primary Entity, the hierarchy consists of nine levels that organize member populations based on various needs, such as employer group purchasing preferences, product lines, and the type, scope, and intensity of service. While the Primary Entity remains the highest level, you can arrange the remaining nodes in any order that aligns with your business structure.

The system defines the default schema hierarchy levels as follows:

1. Primary Entity
2. Line of Business
3. Employer
4. Sub Region
5. Division
6. Function
7. Region
8. Product
9. Risk Population

When configuring the Schema Hierarchy, you must consider the services provided to each member population and how Case Managers are assigned to them. Members are assigned at the lowest level of the hierarchy. Inheritance ensures that all services enabled at a specific node automatically propagate to all members in lower nodes.

You must create the Schema Hierarchy before using other Line of Business functions. TruCare includes a default Schema Hierarchy that represents a standard Commercial or Medicare/Medicaid business structure. These default structures include the standard levels used to create the Business Hierarchy Profile (BHP). The TruCare implementation team works with you to design a Schema Hierarchy that supports a BHP tailored to your current and future business needs.

Once you arrange the Schema Hierarchy to match your desired business structure, the system locks it. You cannot change the order of the levels unless you uninstall and reinstall TruCare and recreate everything from scratch.

## View Schema Hierarchy

To View Schema Hierarchy

1. Navigate to Line of Business → Schema Hierarchy.  
The Schema Hierarchy summary page is displayed.
2. Expand the Schema Hierarchy tree structure to navigate to the appropriate level.
3. To view the details, click on the appropriate tree level.  
The tree level details pane is displayed.

## Edit or Add a Child

To edit or add a child.

1. Navigate to Line Of Business → Schema Hierarchy.  
The Schema Hierarchy page is displayed.
2. Expand the Schema Hierarchy tree structure to navigate to the appropriate level.
3. To edit or remove the level, click on the appropriate tree level.
4. Click Edit.  
The Edit Child pane is displayed.
5. Update the required information and click Submit.

## Business Hierarchy

The Business Hierarchy Profile (BHP) isolates the specific member populations that are managed by your care management organization to all the levels required. This capability allows healthcare initiatives to be tailored to each population.

The BHP names the nodes in the structure of the Schema Hierarchy after the Schema Hierarchy is complete. For example, the Primary Entity might be named Care Management Organization, then each of the lower nodes is named accordingly.

The structure of the BHP cannot deviate from the structure of the Schema Hierarchy. If a new line of business is created, it can have descendants of any type that is a child of a line of business in the schema but after a child has been created, the child's type determines the type of other children of the node. The entire hierarchy can be determined by the type of the child.

Members are always associated with nodes at the bottom of the tree structure.

## About active features and programs

Use the Business Hierarchy section of Line of Business to determine the features that are available for each level in your BHP.

TruCare Admin lets you limit the license features and programs you provide to specific member populations. You can enable these high-level features according to your specific business needs:

- CM (Care Management)
- Collaborate
- DM (Disease Management)
- UM (Utilization Management)
- TruCare Remote
- Member Portal
- Employer Portal
- Provider Portal
- Reporting
- Analytics
- Wellness
- HCS (Home and Community Services)
- AAG (Administrative Appeals and Grievances)

By default, all features that are included in your TruCare license are available at all levels. You can specify that certain features available in a license be unavailable to certain members for business reasons (insurance costs, pricing), or because a certain feature might not be useful to a certain BHP level.

A feature (such as CM, UM, or DM) can contain many programs. For example, possible programs for UM include Inpatient, Inpatient BH, Pharmacy, Pharmacy BH, Services & Procedures, and Services & Procedures BH. If a feature is enabled, by default all the programs in this feature are included. You can turn specific programs on or off at any level.

Perform modifications to the features and programs in the BHP at the highest level possible because all of the children of the entity or node inherit the same features as the parent entity or node.

## Editing the active features and programs

You can configure active features and programs for any level within the business hierarchy. To apply specific settings across multiple levels, repeat the steps below for each relevant node.

Steps to Edit Active Features and Programs:

1. Select the **Business Hierarchy** option from the **Line of Business** menu.
2. Expand the **Business Hierarchy** tree to view all available nodes.
3. Choose the node you want to modify in the **Features/Programs** section.
4. Click **Edit** to enable editing mode for the selected node.
5. Select the **Features and Programs** you want to activate.
6. Click **Submit** to save and apply your changes.

## Add a child to a business entity

You can add children to business entities. Child nodes have the same program and feature settings as their parent node by default.

The **Feed Identifier** field is used to associate nodes in the data feed with nodes in the BHP. The feed identifier must be unique for each node that belongs to the same parent entity you define in the BHP. If you change this field, you might also need to change the data feeds. In general, avoid changing this field for an existing node.



### Note

Prior to removing a child, you must remove all configuration that was entered in **Customer Setup** for this entity or node. All configurations must be set back to **Inherit from Primary Entity** before you can remove the node. See [Remove a child from a business entity \[50\]](#).

## Add a Child tree level

To Add a Child tree level

1. Navigate to Line of Business > Business Hierarchy.
2. Expand the Business Hierarchy tree structure to navigate to the appropriate level.
3. To add A Child Tree level, click on the appropriate tree level.

The Add Child and Remove options are displayed.

4. Click Add Child.



### Note

The Add Child options is displayed in the last tree level in the hierarchy.

The Add Child pane is displayed.

5. Enter the required Child tree level information in the following fields:
  - Display Label
  - Feed Identifier

- Type

6. Click Submit.

The Child tree level is added to the Business Hierarchy Outline.

## View Business Hierarchy

To view Business Hierarchy

1. Navigate to Line of Business → Business Hierarchy.

The Business Hierarchy summary page is displayed.

2. Expand the Business Hierarchy tree structure to navigate to the appropriate level.

3. To view the details, click on the appropriate tree level.

The tree level details pane is displayed.



### Note

When you click on the tree level, you may also Add Child level entries or Remove a tree level.

## Edit labels and identifiers in the business hierarchy

Edit the display label and feed identifier for any level of a business hierarchy. You can also change the **Ready To Export** setting.

The **Feed Identifier** field is used to associate nodes in the data feed with nodes in the BHP. The **Feed Identifier** must be unique for each node that belongs to the same parent entity you define in the BHP. If you change this field, you might also need to change the data feeds. In general, avoid changing this field for an existing node.

## Edit Business Hierarchy details

To edit Business Hierarchy details

1. Navigate to Line of Business > Business Hierarchy.

The Business Hierarchy summary page is displayed.

2. Expand the Business Hierarchy tree structure to navigate to the appropriate level.

3. To edit the details, click on the appropriate tree level.

The tree level details pane is displayed.

4. Click Edit.

5. Update the required information and click Submit.

## Remove a child from a business entity

You can remove nodes from the business hierarchy. If you remove a node that has children, the children are also deleted.

Prior to removing a child, you must remove all configuration that was entered in **Customer Setup** for this entity or node. All configurations must be set back to **Inherit from Primary Entity** before you can remove the node.

## Delete a Business Hierarchy tree level

To delete a Business Hierarchy tree level

1. Navigate to Line of Business > Business Hierarchy.

The Business Hierarchy summary page is displayed.

2. Expand the Business Hierarchy tree structure to navigate to the appropriate level.

3. Click the Business Hierarchy tree.  
The Remove button is displayed in the Business Hierarchy tree.
4. Click Remove.  
A confirmation message is displayed.
5. Click Yes.  
The Business Hierarchy tree is deleted from the tree view.

## Feature Matrix

The feature matrix shows the license features you provide to specific member populations. You can enable or disable these high-level features according to your specific business needs.

The feature matrix shows the features that are available for each level in your BHP. By default, all features that are included in your TruCare license are available to all levels. You can specify that certain features available in a license be unavailable to certain clients for business reasons (insurance costs and pricing), or because a certain feature might not be useful for a certain BHP level.

The feature matrix displays the license features you assign to specific member populations.

- CM (Care Management)
- Collaborate
- DM (Disease Management)
- UM (Utilization Management)
- Analytics
- Reporting
- Member Portal
- Provider Portal
- Employer Portal
- TruCare Remote
- Wellness
- HCS (Home and Community Services)
- AAG (Administrative Appeals and Grievances)
- Medication Management - requires integration with Wolters Kluwer's Medi-Span® database to use the features offered by this license.
- Insights Care Management
- Insights Care Management with Business Intelligence and Modeling
- Insights Time Tracking
- Insights Time Tracking with Business Intelligence and Modeling
- Insights Utilization Management
- Insights Utilization Management with Business Intelligence and Modeling

The feature matrix displays the features available at each level in your BHP. By default, TruCare includes all licensed features for all levels. You can restrict certain licensed features from specific clients for business reasons, such as insurance costs and pricing, or because a feature may not be useful at a particular BHP level.

## View Feature Matrix

To view the Feature Matrix

1. Navigate to Line Of Business > Feature Matrix.  
The Feature Matrix summary page is displayed.

2. Expand the Feature Matrix tree structure to navigate to the appropriate level.

**Note**

The feature matrix is a view only page and does not allow you to editing the features.

## Program Matrix

The program matrix shows the specific programs that members receive at each level of the BHP. Each feature or license (such as CM, UM, or DM) can include multiple programs. You assign programs to business levels using the Business Hierarchy tab.

### View Program Matrix

To view the Feature Matrix

1. Navigate to Line Of Business > Program Matrix.  
The Program Matrix summary page is displayed.
2. Select the appropriate option from the License Feature drop-down list.
3. Expand the Program Matrix tree structure to navigate to the appropriate level.

**Note**

The Program matrix is a view only page and does not allow you to editing the features.

A Y under the program name indicates available programs.

## Customer Setup

Use **Customer Setup** to configure the features in according to member BHP.

You can perform configuration at the highest node possible knowing that every node below it inherits the same settings. Use this feature only when exceptions are necessary.

The customer setup provides a hierarchical tree structure to represent BHP nodes, enabling users to easily navigate and understand node relationships within the system. Additionally, organize License-related features into tabbed sections, as reflected in the latest design mockups. This tabbed layout improves discoverability, streamlines access to different feature sets, and aligns with modern UI best practices.

### View Customer Setup

To view customer setup

1. Navigate to Line of Business → Customer Setup.  
The Customer Setup summary page is displayed.
2. Expand the Customer Setup tree structure to navigate to the appropriate level.
3. To view the details, click on the appropriate tree level.

The tree level details pane is displayed.

The Customer Setup includes the following categories:

- Generic
- DM
- CM
- AAG
- HCS

- UM
- Medication Management

## Generic Information

**Prerequisites:** Navigate to Customer Setup and click the Generic tab.

To view the Generic Information

1. Select the appropriate tree level hierarchy.  
The configuration pane is displayed.
2. To view the Generic Information, click the Generic tab.
3. The Generic tab displays the following options:
  - Correspondence
    - Template List
    - BHP Configuration
    - PDF Logo Configuration
    - Configure Fax Failure Task
    - Printing Queue
  - Cost Savings
  - Scheduler
  - Member location
  - Member Details
    - BHP Field Setup
    - SSN
    - Member Information
  - Program Configuration
  - Localization
    - Country
    - Currency
  - Product Features
  - Notes
  - UDF
  - Referral
4. To add or edit the Configure fax failure task, click Correspondence > Configure fax failure task.
  - a. Click Add Definition or Edit as required.  
The Add Definition pane is displayed.
  - b. Enter or update the appropriate information and click Submit.
5. To edit the Printing Queue, click Correspondence > Printing Queue.
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Select Existing Folder or Add New Folder.
  - c. Enter the appropriate folder name.
  - d. Click Submit.
  - e. To Inherit from parent node, click Inherit from parent node.  
A confirmation message is displayed.
6. To edit the Country, click Localization.
  - a. Click Add Definition.

- The Add Definition pane is displayed.
    - b. Select the appropriate country from the drop-down and click Submit.
  7. To edit the Currency, click Localization.
    - a. Click Add Definition.
 

The Add Definition pane is displayed.

      - b. Select the appropriate currency from the drop-down and click Add Currency.
      - c. Click the appropriate selection as Default.
  8. To edit the Template Configuration, click Template List.
    - a. Click Add Definition.
 

The Add Definition pane is displayed.

      - b. Select the appropriate Template Name and click Submit.
      - c. Click the appropriate selection as Default.
  9. To edit the BHP Configuration, click BHP Configuration.
    - a. Click Add Definition.
 

The Add Definition pane is displayed.

      - b. In BHP Configuration, click Edit
      - c. Select the appropriate logo and click Submit.
      - d. Click the appropriate selection as Default.
  10. To edit the Template Configuration, click Template List.
    - a. Click Add Definition.
 

The Add Definition pane is displayed.

      - b. Select the appropriate Template Name and click Submit.
      - c. Click the appropriate selection as Default.
  11. To edit the Cost Savings, click Cost Savings.
    - a. Click Add Definition.
 

The Add Definition pane is displayed.

      - b. Select Yes or No to enable the cost savings and click Submit.
  12. To edit the Members details, click Member Details > BHP Field Setup
    - a. Click Add Definition.
 

The Add Definition pane is displayed.

      - b. Enter the appropriate Field Name, Field Value, and click Submit.
  13. To edit the Members details, click Member Details > SSN
    - a. Click Add Definition.
 

The Add Definition pane is displayed.

      - b. Select the appropriate options in the Member Social Security Number (SSN) Masking and click Submit.
  14. To edit the Members Information, click Member Details > Member Information
    - a. Click Add Definition.
 

The Add Definition pane is displayed.

      - b. Move the appropriate options to the header tab and click Submit.
  15. To edit the Member Location, click Member Location
    - a. Click Add Definition.
 

The Add Definition pane is displayed.

      - b. Select Yes or No to enable the Enable Location Summary and click Submit.
  16. To edit or Copy Notes, click Notes.
    - a. Click Add Definition.
 

The Add Definition pane is displayed.

- b. Click Select Notes or Copy Notes.
  - c. Select the appropriate Notes and click Submit.  
A confirmation message is displayed.
  - d. Click Yes.
  - e. To Inherit from parent node, click Inherit from parent node.  
A confirmation message is displayed.
17. To edit or Copy an UDF, click UDF.
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Click Add UDF or Copy UDF.
  - c. Select the appropriate UDF and click Submit.  
A confirmation message is displayed.
  - d. Click Yes.
  - e. To Inherit from parent node, click Inherit from parent node.  
A confirmation message is displayed.
18. To edit the Product Features, click Product Features
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Select Yes or No to enable the Enable Product Features and click Submit.
19. To edit the Scheduler, click Scheduler
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Expand the appropriate category and update information.
  - c. Click Add Attribute.
  - d. To save the schedule, click Submit.
20. To edit the Notes, click Notes
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Select the appropriate Template Name and click Submit.
  - c. To Inherit from parent node, click Inherit from parent node.  
A confirmation message is displayed.
  - d. Click Yes.  
Configuration Inherited from Parent message is displayed.

## DM - Disease Management

For disease management (DM), you can configure Program Enrollment Mailings and Correspondence Template Lists.

**Prerequisites:** Navigate to Customer Setup and click the DM tab.

To view the DM Information

1. Select the appropriate tree level hierarchy.  
The configuration pane is displayed.
2. To view the DM Information, click the DM tab.
3. The DM tab displays the following options:
  - Correspondence
4. To edit the Template Configuration, click Template List.
  - a. Click Add Definition.  
The Add Definition pane is displayed.

- b. Select the appropriate Template Name and click Submit.
  - c. Click the appropriate selection as Default.
5. To edit the Program Enrollment Mailings, click Program Enrollment Mailings.
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Enable or Disable the appropriate option and click Submit.  
The Edit and Inherit from parent node buttons are displayed.
  - c. To Inherit from parent node, click Inherit from parent node.  
A confirmation message is displayed.
6. To edit the Letter configuration in programs, click Correspondence >Program Enrollment Mailings.
  - a. Click Add Definition.
  - b. In the Programs section drop-down, select the appropriate Program.
  - c. You may select either Automatically generate letter without user intervention or Create task for letter review.
7. To edit a Correspondence, click the appropriate letter or template.
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Select the appropriate template and Click Submit.  
The Correspondence pane is displayed.

## CM - Case Management

**Prerequisites:** Navigate to Customer Setup and click the CM tab.

1. To edit the Template Configuration, click Template List.
  - a. Click Add Definition.  
The Select Letter Template pane is displayed.
  - b. Select the appropriate Template Name and click Submit.
  - c. Click the appropriate selection as Default.
2. To edit a Correspondence, click the appropriate letter or template.
  - a. Click Add Definition.  
The Correspondence pane is displayed.
  - b. Select Create task for letter review and click Select Template.
  - c. Select the appropriate options in the following drop-down menu:
    - Queue/Assignee
    - Priority
    - Task due date offset in days
 The Template pane is displayed.
  - d. Select the appropriate template and Click Submit.  
The Correspondence pane is displayed.
  - e. Click Submit.  
The appropriate letter or template is added.
3. To edit the Correspondence, click Welcome Letter Mailing.
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Select the appropriate Template Name and click Submit.
  - c. To Inherit from parent node, click Inherit from parent node.  
A confirmation message is displayed.

- d. Click Yes.
4. To edit an Assessment, click the appropriate letter or template.
  - a. Navigate to Line Of Business > Primary Entity > CM > Assessments.
  - b. Click Add Assessment.  
The Assessment pane is displayed.
  - c. Select the appropriate options in the following drop-down menu:
    - Assessment Type
    - Queue/Assignee
    - Priority
    - Task due date offset in days
  - d. Click Submit.  
The appropriate Assessment is added.
5. To edit Task Attempts, click Task Attempts.
  - a. Click Edit.  
The Add Definition pane is displayed.
  - b. Select the appropriate options and click Submit.
  - c. To Inherit from parent node, click Inherit from parent node.  
A confirmation message is displayed.
6. To edit Case Configuration, click Case Configuration.
  - a. Click Edit.  
The Add Definition pane is displayed.
  - b. Select or Deselect the appropriate options and click Submit.
  - c. To Inherit from parent node, click Inherit from parent node.  
A confirmation message is displayed.
7. To edit Message Board Alerts, click Message Board Alerts.
  - a. Click Add Functionality.  
The Add Functionality pane is displayed.
  - b. Update the required information and click Submit.
8. To edit Time Tracking, click Time Tracking.
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Enable or Disable Time Tracking and click Submit.
9. To edit a Care Plan Configuration, click Care Plan Configuration.
  - a. Click Edit.  
The Edit Care Plan pane is displayed.
  - b. Select or Deselect the appropriate options and click Submit.


## AAG - Administrative Appeals and Grievances

For Administrative Appeals and Grievances (AAG), you can configure the following options:

**Prerequisites:** Navigate to Customer Setup.

To view the AAG Information

1. Select the appropriate tree level hierarchy.  
The configuration pane is displayed.
2. To view the AAG Information, click the AAG tab.
3. The AAG tab displays the following options:
  - [AAG Definition \[58\]](#)

- [AAG Trigger \[58\]](#)
  - [Template Configuration \[58\]](#)
4. To edit the AAG Definition, click AAG Definition.
    - a. Select the appropriate definition from the AAG Type drop-down menu.
    - b. Click Add Definition.  
The Add Definition pane is displayed.
    - c. Click Edit.  
The Edit AAG Definition page is displayed.
    - d. In the Actions column, click .  
The Option Value Select pane is displayed.
    - e. Select the appropriate Option Values and click Submit.  
The Edit AAG Definition page is displayed.
    - f. Click Submit.
  5. To edit the AAG Trigger, click AAG Trigger.
    - a. Move the appropriate Option Values and click Submit.  
A confirmation message is displayed.
    - b. Click Yes.
  6. To edit the Letter Template, click Correspondence Template List.
    - a. Click Add Definition.  
The Select Letter Template pane is displayed.
    - b. Select the appropriate Template Name and click Submit.
    - c. Click the appropriate selection as Default.
  7. To edit the Template Configuration, click Correspondence Templates.
    - a. Click Add Definition.  
The Add Definition pane is displayed.
    - b. Select the appropriate Template Name and click Submit.
    - c. Click the appropriate selection as Default.
    - d. To Inherit from parent node, click Inherit from parent node.  
A confirmation message is displayed.
    - e. Click Yes.

## AAG header

Configure the AAG header under the AAG license.

All BHP nodes will have the following initial configuration. However, if a parent node receives a custom configuration, the child nodes will inherit that configuration. If the parent node does not receive a custom configuration, the nodes will follow the Technical configuration.

In the **AAG Header** section, you can configure the following fields displayed in the table. The triggering fields must be set to display, so that the configurations set in the associated fields work. For example, if **Timeframe Extension** is changed to not display, then any configuration set to its associated fields (**Extension Requested Date** and **Extension Requested By**) is cleared.

**Table 20. AAG Details**

Field Name	Display Required Edit		
AAG Reason	Yes	Yes	Yes
AAG Urgency	No	No	Yes
Received Method	No	No	Yes
Appeal Type	Yes	Yes	Yes

Field Name	Display	Required	Edit
Claim Id	Yes	Yes	No
Vendor Id	Yes	Yes	No
AAG Due Date	Yes	No	No
Request Timely	Yes	Yes	No
Good Cause Receipt Date (enabled when <b>Request Timely</b> is selected)	Yes	Yes	No
Good Cause Exception (enabled when <b>Request Timely</b> is selected)	Yes	Yes	Yes
Urgency Change Reason	Yes	Yes	Yes
Urgency Change Requested By	Yes	Yes	Yes
Urgency Change Requested Date	Yes	Yes	No
Timeframe Extension	Yes	No	No
Extension Requested Date (enabled when <b>Timeframe Extension</b> is selected)	Yes	Yes	No
Extension Requested By (enabled when <b>Timeframe Extension</b> is selected)	Yes	Yes	Yes
Complete Clinical Information Received Date	Yes	No	No
Prior Authorization Denied for Lack of Medical Necessity	Yes	No	No
<b>Requestor Information</b>			
Request Source	Yes	No	Yes
AOR Request	Yes	No	No
AOR Receipt Date	No	No	No
Form Required	No	No	No
Form Type	No	No	Yes
WOL Request	Yes	No	No

For each of the above, if the option is presented:

- To access the AAG Header, click:  
Line of Business → Customer Setup → select the node → AAG tab → AAG → select the node AAG tab → AAG → select an AAG type under the AAG Definition option.
- To add an **AAG Type**, click Add Definition → Add definition for this node.  
If the **AAG Type** is configured, and you want to edit fields in the **AAG Header** section, click **Edit**.  
For each of the above, if the option is presented:
  - Click **Action**, then select the options to display in TruCare.
    - By default, all options are selected.  
Clear the options that you do not want to display in TruCare.  
To clear all the options, clear the check box next to the **Default** column, then select the options you want to display in TruCare.
    - Click **Default** option to configure the option as a default for this value.
  - Select **Display** if you want the option to appear in TruCare.
    - Click **Required** (becomes active if **Display** is selected) if this field is required in TruCare.
    - Click **Action** (becomes active if **Display** is selected) to select the options for appeal type.
    - Click **Default** (if the option is selected) to configure as a default for the option.
    - Click **Submit** to save the selected options.
- Click **Submit**.

## Configure AAG Trigger

Use the AAG Trigger tab to select which option values for the **AAG Trigger** drop-down will trigger the **Urgency Change Reason**, **Urgency Change Requested By**, and **Urgency Change Requested Date** to be conditionally displayed.

Consistent with AAG configuration functionality, if a customer configuration is not set for a node, that node will inherit parent nodes configuration.

1. Click **Line of Business** → **Customer Setup**.
2. Select the child node where the configuration changes are required.
3. Select the **AAG** tab from the right pane.
4. Select the **AAG Trigger** option.
5. Select the **AAG** type.
6. Click **Add Definition**.
7. Select the options you want to trigger in the **Available Option Values** box and move them into the **AAG Urgency Trigger** box (multi select).
8. Click **Submit**.

## HCS - Home and Community Services

**Prerequisites:** Navigate to Customer Setup.

To view the HCS Information

1. Select the appropriate tree level hierarchy.  
The configuration pane is displayed.
2. To view the HCS Information, click the HCS tab.
3. The HCS tab displays the following options:
  - Enrollment Task Configuration
  - Correspondence Templates
  - Individual Service Plan
  - Service Request Submission
4. To edit the Individual Service Plan, click Individual Service Plan.
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Enter the appropriate information and click Submit.
  - c. To Inherit from parent node, click Inherit from parent node.  
A confirmation message is displayed.
5. To edit the Enrollment Task Configuration, click Enrollment Task Configuration.
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Select the appropriate Default Task Package For and click Submit.
  - c. Click the appropriate selection as Default.
  - d. To Inherit from parent node, click Inherit from parent node.  
A confirmation message is displayed.
6. To edit the Correspondence Templates, click Correspondence Templates.
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Select the appropriate Default Task Package For and click Submit.
  - c. Click the appropriate selection as Default.
7. To edit the Correspondence Templates, click Correspondence Templates.
  - a. Click Add Definition.

- The Add Definition pane is displayed.
  - b. Select the appropriate Default Task Package For and click Submit.
  - c. Click the appropriate selection as Default.
8. To edit the Service Request Submission, click Service Request Submission.
  - a. Click Add Definition.
 

The Add Definition pane is displayed.
  - b. Select the appropriate Service Request Line Items and click Submit.
 

A confirmation message is displayed.
  - c. Click Yes.
  - d. To Inherit from parent node, click Inherit from parent node.
 

A confirmation message is displayed.
  - e. Click Yes.


## UM - Utilization Management

**Prerequisites:** Navigate to Customer Setup and click the UM tab.

To view the UM Information

1. Select the appropriate tree level hierarchy.
 

The configuration pane is displayed.
2. To view the UM Information, click the UM tab.
3. The UM tab displays the following options:
  - Authorization Types
  - Diagnosis Types
  - Authorization/Submission Options
    - Authorization Definition Inpatient
    - Authorization Definition Service/Procedure
    - Authorization Definition Rx
    - Line Item Level Urgency Trigger Inpatient
    - Line Item Level Urgency Trigger Service/Procedure
    - Line Item Level Urgency Trigger Rx
    - Line Item Definition Inpatient
    - Line Item Definition Service/Procedure
    - Line Item Definition Rx
    - Submission Options Inpatient
    - Submission Options Service/Procedure
    - Submission Options Rx
  - Comprehensive Authorization
  - Concurrent Review
  - Business Rules Engine
  - Determinations
  - Prescreen
  - Criteria Source
  - IP Configuration
  - Service Type Configurations
    - SP Service Types
    - IP Service Types
    - RX Service Types

- IP Auth: SP Line Items
  - SP Auth: SP Line Items
  - RX Auth: RX Line Items
  - IP Auth: RX Line Items
  - Task Attempt Configuration
  - Correspondence
    - Template List
    - Auto-Generation
  - Request For Information
  - UM Appeal Options
    - UM Appeal Definition
    - UM Appeal Trigger
    - Configure Appeal Tasks
  - Attachment Notification Task
  - Note Notification Task
4. To edit the Diagnosis Types, click Authorization Options > Diagnosis Types.
    - a. Click Add Definition.  
The Add Definition pane is displayed.
    - b. Enable or Disable the appropriate option and click Submit.
  5. To edit the IP Configuration, click Authorization Options > IP Configuration.
    - a. Click Add Definition.  
The Add Definition pane is displayed.
    - b. In the Actions column, click .  
The Option Value Selection tab is displayed.
    - c. Select the appropriate IP Configuration and click Submit.  
The IP Configuration tab is displayed.
    - d. Validate the selections and click Submit.
  6. To edit the Authorization Definition Configuration, click Authorization Options > Authorization/Submission Options > Authorization Definition Rx.
    - a. Click Add Definition.  
The Add Definition pane is displayed.
    - b. Select the appropriate Authorization Header - Rx and click Submit.
    - c. Click the appropriate selection as Default.
  7. To edit the Submission Options - Service/Procedure, click Authorization Options > Authorization/Submission Options > Submission Options - Service/Procedure.
    - a. Select the appropriate option from the Diagnosis Type drop-down.  
The appropriate diagnosis type page is displayed.
    - b. Click Add Definition.  
The Add Definition pane is displayed.
    - c. Select the appropriate options and click Submit.  
A confirmation message is displayed.
    - d. Click Yes.
  8. To edit the Submission Options Inpatient, click Authorization Options > Authorization/Submission Options > Submission Options Inpatient.
    - a. Select the appropriate option from the Diagnosis Type drop-down.  
The appropriate diagnosis type page is displayed.

- b. Click Add Definition.  
The Add Definition pane is displayed.
        - c. Select the appropriate options and click Submit.  
A confirmation message is displayed.
        - d. Click Yes.
9. To edit the Prescreen options, click Authorization Options > Prescreen.
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Enable or Disable the appropriate option and click Submit.
10. To edit the Criteria Source, click Authorization Options > Criteria Source.
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Enable or Disable the appropriate option and click Submit.
11. To edit the Service Type Configurations, Navigate to Service Type Configurations > Select the appropriate configuration.  
The following are the applicable Authorization Definition categories:
  - IP Auth: SP Line Items
  - SP Auth: SP Line Items
  - a. Click Edit.  
The Add Definition pane is displayed.
  - b. In the Actions column, select the appropriate options in the following drop-down menu:
    - Inherit from parent
    - Exclude
  - c. Click Submit.  
A confirmation message is displayed.
  - d. Click Yes.
12. To edit the IP Service Type, Navigate to Service Type Configurations > IP Service Type.
  - a. Select the appropriate Inpatient Service Type from the drop-down menu.
  - b. Click Add Definition.  
The Add Definition pane is displayed.
  - c. Select or Deselect the appropriate option and click Submit.
  - d. Click Submit.
13. To edit the IP Service Type, Navigate to Service Type Configurations > SP Service Type.
  - a. Select the appropriate SP Service Type from the drop-down menu.
  - b. Click Add Definition.  
The Add Definition pane is displayed.
  - c. Select or Deselect the appropriate option and click Submit.
  - d. Click Submit.
14. To edit the Rx Service Type, Navigate to Service Type Configurations > Rx Service Type.
  - a. Select the appropriate Rx Service Type from the drop-down menu.
  - b. Click Add Definition.  
The Add Definition pane is displayed.
  - c. Select or Deselect the appropriate option and click Submit.
  - d. Click Submit.
15. To edit the IP Auth: Rx Line Item, Navigate to Service Type Configurations > IP Auth: Rx Line Item.
  - a. Select the appropriate IP Auth: Rx Line Item from the drop-down menu.

- b. Click Add Definition.  
The Add Definition pane is displayed.
  - c. In the Actions column, select the appropriate option and click Submit.
  - d. Click Submit.
16. To edit the Rx Auth: Rx Line Item, Navigate to Service Type Configurations > Rx Auth: Rx Line Item.
  - a. Select the appropriate Rx Auth: Rx Line Item from the drop-down menu.
  - b. Click Add Definition.  
The Add Definition pane is displayed.
  - c. In the Actions column, select the appropriate option and click Submit.
  - d. Click Submit.
17. To edit the Business Rules Engine, Navigate to Authorization Options > Business Rules Engine.
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Select the appropriate options and click Submit.  
A confirmation message is displayed.
  - c. Click Yes.
  - d. Click the appropriate selection as Default.
18. To edit the Comprehensive Authorization, click Authorization Options > Comprehensive Authorization.
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Enable or Disable the appropriate option and click Submit.  
A confirmation message is displayed.
  - c. Click Yes.
  - d. Click the appropriate selection as Default.
19. To edit the Concurrent Review, click Authorization Options > Concurrent Review.
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Enable or Disable the Concurrent Review option.
  - c. Select the appropriate options in the following drop-down menu:
    - Queue/Assignee
    - Priority
 A confirmation message is displayed.
  - d. Click Yes.
  - e. Click the appropriate selection as Default.
20. To edit the Task Attempt Configuration, click Authorization Options > Task Attempt Configuration.
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Update the appropriate option and click Submit.
  - c. Click Submit.
21. To edit the Determinations, click Authorization Options > Determinations.
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Enable or Disable the appropriate option and click Submit.  
A confirmation message is displayed.

- c. Click Yes.
  - d. Click the appropriate selection as Default.
22. To edit the Request for Information, click Authorization Options > Request for Information.
  - a. Click Add Definition.

The Add Definition pane is displayed.
  - b. Enable or Disable the appropriate option and click Submit.

A confirmation message is displayed.
  - c. Select the appropriate options in the following drop-down menu:
    - Queue/Assignee
    - Priority
    - Task due date offset in days
  - d. Click Submit.
  - e. Click the appropriate selection as Default.
23. To edit the Authorization Definition category, click Authorization Options > Authorization/ Submission Options > Authorization Definition category.

The following are the applicable Authorization Definition categories:

  - Inpatient
  - Service/Procedure
  - a. Click Add Definition.

The Add Definition pane is displayed.
  - b. Select the appropriate option and click Submit.

A confirmation message is displayed.
  - c. Click Yes.
  - d. Click the appropriate selection as Default.
24. To edit the Line Item Level of Urgency Trigger, click Authorization Options > Authorization/ Submission Options > Line Item Level of Urgency Trigger.

The following are the applicable Authorization Definition categories:

  - Inpatient
  - Service/Procedure
  - a. Click Add Definition.

The Add Definition pane is displayed.
  - b. Move the appropriate Option Values and click Submit.

A confirmation message is displayed.
  - c. Click Yes.
  - d. Click the appropriate selection as Default.
25. To edit the Line Item Definition Rx, click Authorization Options > Authorization/Submission Options > Line Item Definition Rx.

The following are the applicable Line Item Definition Rx categories:

  - Requestor Information
  - Urgency Level Details
  - Extension Details
  - a. Click Add Definition.

The Add Definition pane is displayed.
  - b. Select the appropriate Definition and click Submit.

A confirmation message is displayed.
  - c. Click Yes.

- d. Click the appropriate selection as Default.
26. To edit the Line Item Definition Inpatient, click Authorization Options > Authorization/ Submission Options > Line Item Definition Inpatient.
  - a. Click Add Definition.


The Add Definition pane is displayed.
  - b. Select the appropriate Definition and click Submit.

A confirmation message is displayed.
  - c. Click Yes.
  - d. Click the appropriate selection as Default.
27. To edit the Template Configuration, click Correspondence > Template Configuration.
  - a. Click Add Definition.

The Select Letter Template pane is displayed.
  - b. Select the appropriate Task Configuration and click Submit.
28. To edit the Auto Letter Generation, click Correspondence > Auto Letter Generation.
  - a. Select the appropriate Appeal Type in the drop-down.
  - b. Click Add Definition.

The Add Definition pane is displayed.
  - c. Select the appropriate Task Configuration and click Submit.
29. To edit the UM Appeal Definition, click UM Appeal Options > UM Appeal Definition.
  - a. Click Add Definition.

The Appeal Definition pane is displayed.
  - b. Select the appropriate Appeal Type in the drop-down.
  - c. Click Add Definition.

The Add Definition pane is displayed.
  - d. In the Actions column, click .
  - e. Select the appropriate Option Values and click Submit.
30. To Configure Appeal Tasks, click UM Appeal Options > Configure Appeal Tasks.
  - a. Click Add Definition.

The Add Definition pane is displayed.
  - b. Update the appropriate Option and click Submit.
31. To edit the UM Appeal Trigger, click UM Appeal Options > UM Appeal Trigger.
  - a. Click Add Definition.

The Add Definition pane is displayed.
  - b. Move the appropriate Option Values and click Submit.
32. To edit the Attachment Notification Task, click Attachment Notification Task.
  - a. Click Add Definition.

The Add Definition pane is displayed.
  - b. Update the appropriate Option Values and click Submit.
33. To edit the Note Notification Task, click Note Notification Task.
  - a. Click Add Definition.

The Add Definition pane is displayed.
  - b. Update the appropriate Option Values and click Submit.
34. To edit the Submission Options-Rx, Navigate to Authorization Options > Authorization/ Submission Options > Submission Options-Rx.
  - a. Click Add Definition.


The Add Definition pane is displayed.
  - b. Select or Deselect the appropriate Option Values and click Submit.

35. To edit the Line Item Definition-Rx, Navigate to Authorization Options > Authorization/ Submission Options > Line Item Definition-Rx.
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. In the Actions column, click Edit.
  - c. The Add Definition pane is displayed.  
The Options Value Select pane is displayed.
  - d. Select or Deselect the appropriate Option Values and click Submit.  
The Add Definition pane is displayed.
  - e. Click Submit.


## Medication Management

**Prerequisites:** Navigate to Customer Setup.

To edit Medication Management

1. Select the appropriate tree level hierarchy.  
The configuration pane is displayed.
2. To view the Medication Management, click the Medication Management tab.
3. The Medication Management tab displays the following options:
  - Correspondence Templates
  - Medicare Coverage Gap
  - Measure Configuration
4. To view the Medication Management Information, click Medicare Coverage Gap.  
To edit the Medication Management Information:
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Enable or Disable the Prescription Coverage Gap and click Submit.  
The Edit and Inherit from parent node buttons are displayed.
  - c. To Inherit from parent node, click Inherit from parent node.  
A confirmation message is displayed.
  - d. Click Yes.  
Configuration Inherited from Parent message is displayed.
5. To view the Measure List, click Measure Configuration > Measure List.  
To edit the Measure List:
  - a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Enable or Disable the Prescription Coverage Gap and click Submit.  
The Edit and Inherit from parent node buttons are displayed.
  - c. To Inherit from parent node, click Inherit from parent node.  
A confirmation message is displayed.
  - d. Click Yes.  
Configuration Inherited from Parent message is displayed.
6. To view the Measure Definitions, navigate to Medication Management > Measure Definition.  
To edit the Measure Definition:
  - a. In the Actions column, click  > Edit.
  - b. Update the required information and click Submit.

To copy the Measure Definition:

- a. In the Actions column, click  > Copy.
  - b. Update the required information and click Submit.
7. To edit the Template Configuration, click Correspondence Configuration.
- a. Click Add Definition.  
The Add Definition pane is displayed.
  - b. Select the appropriate Template Name and click Submit.

## Member Filter

Member filters define the member populations visible to user groups in TruCare.

Create and manage security groups that control member access based on the Business Hierarchy. Then you assign a member filter group to a user.

A member filter makes the members of one or more nodes accessible to users who are associated with the member filter. If an entity or node has children, access to the entity or node allows access to all of the child nodes that are descendants of the entity or node. Members are always associated with the lowest node of the BHP.

## Create Member Filter

Create the member filter groups to assign to users. Member filters need to be only at the appropriate parent node so that any user assigned to the member filter can view the members in this filter node as well and the members in this filter's children nodes.

To Create Member Filter

1. Navigate to Line of Business → Member Filter.  
The Member Filter summary Page is displayed.
2. Click Create New Member Filter Group.  
The Create Member Filter Group page is displayed.
3. Enter the required information in the following fields:
  - Name
  - Ready To Export



### Note

The import and export (IMEX) process will fail if the Parent artifact is RTE-enabled but the Child artifacts are not RTE-enabled. The error caused by the incorrect artifact is logged in the **tc\_infolog** table, along with a reference to the linked Child artifact.

You can export successfully only if RTE is enabled for both the Parent and Child artifacts.

- Description
4. Click Select Path.  
The Add Business Hierarchy Path pane is displayed.
  5. Select the required line items and click Submit.  
The Member Filter summary Page is displayed.
  6. Click Submit.



### Note


For the member filter group to be exported, its associated BHP nodes (that you configure in the next step) must also be marked as ready to export.

### Example 1. Example

if a member filter group that is marked as ready to export includes two BHP nodes, BHP1 and BHP2, of which only BHP1 is marked as ready to export, the configuration for the member filter group for BHP1 will be exported while the configuration for the member filter group for BHP2 will not be exported.

## View Member Filter


To view a Member Filter

1. Navigate to Line of Business → Member Filter.
2. In the Actions column, click  > View.
3. Update the required information and click Submit.

## Edit Member Filter

You can edit the group name and description, mark the group as ready to export, and add or remove BHP paths.

To edit a Member Filter

1. Navigate to Line of Business → Member Filter.
2. In the Actions column, click  > Edit.
3. Update the required information and click Submit.



### Note

When you click Edit to edit a member filter group, the Ready To Export check box is cleared even if it was previously selected.


For the member filter group to be exported, its associated BHP nodes (that you configure in the next step) must also be marked as ready to export.

### Example 2. Example

if a member filter group that is marked as ready to export includes two BHP nodes, BHP1 and BHP2, of which only BHP1 is marked as ready to export, the configuration for the member filter group for BHP1 will be exported while the configuration for the member filter group for BHP2 will not be exported.


## Copy Member Filter

To copy a Member Filter

1. Navigate to Line of Business → Member Filter.
2. In the Actions column, click  > Copy.
3. Update the required information and click Submit.

## Delete Member Filter

To Delete a Member Filter

1. Navigate to Line of Business → Member Filter.
2. In the Actions column, click  > Delete.  
A confirmation message is displayed.
3. Click Yes.

# Care Management

**Care Management:** The Care Management component includes tools that let users set up and manage program-related artifacts and functionalities within TruCare. It enables administrators to tailor TruCare artifacts to align with organizational workflows and clinical requirements.

## Assessments

Assessments in TruCare consist of question groups, which contain individual questions. Users can create conditional questions that trigger additional questions based on member responses.

While TruCare provides built-in assessments, question groups, and questions, users can also create their own or copy existing ones as templates. When building a new assessment, it is best to create questions first, followed by groups, and then the assessment. Assessment results can trigger actions based on member responses.

## Assessments

### About publish and ready to export

Publishing assessments, groups, and questions and marking them as ready to export affects your ability to edit the artifact.

Before you can use an assessment in TruCare, you need to publish it and all of its contents. When you publish an assessment, you cannot make any changes to it or its contents unless you unpublish it. You can unpublish only a question whose parent is not published.

When you publish an assessment, you can publish any assessment groups it contains and any questions contained in the assessment groups. Similarly, when you publish an assessment group, you can publish any of its child questions.

To maintain the best control over what you are publishing, you can publish questions, groups, and assessments from the bottom up. However, publishing an assessment or group is a convenient way to publish all of the contents at once.

Marking an assessment, group, or question **Ready To Export** means it is ready to be exported from TruCare Admin and then imported to TruCare. For information on importing and exporting, see [TruCare Import Export Guide](#).

Similar to publishing, when you mark an assessment or group ready to export, the change propagates down the hierarchy and all children and their children are marked ready to export.

Once you mark any aspect of an assessment **Ready to Export**, you cannot make any edits to it, including unpublishing. You can only change the status from **Published** to **Disabled**. Make sure you have previewed your assessment and are satisfied with the structure before you mark it as ready to export. See [Preview and test an assessment](#).

## Create a basic question

Create an assessment question that does not have conditional questions.

You can use a basic question as a question in an assessment group or as a child of a question that has a conditional question. After you create a question, it becomes part of the question library.

1. Select Clinical Configuration → Assessment Questions.
2. Select **Create New Question**.
3. Enter the question text, an ID, and the type of interface element you want to use.
4. (Optional) The **Version** field shows the version you are working on. The version for a new question is 1. Enter a comment to describe the version.

5. Depending on the type of element, you are prompted for more information. For a date field, for example, you are not prompted for more information. For a text field, you are prompted only for whether the information is textual or numeric. Respond to the prompt as needed.  
For elements that require the user to choose between options, see [Add an option group to a question](#).
6. To publish the question, change **Status** to **Publish**. Respond to the confirmation.
7. Select **Submit**.

## Add an option group to a question

Specify option groups such as drop-down lists to use in an assessment question.

A question can have a simple date or text box for the user to enter the answer or you can specify options for the user to select from. For example, suppose you select **Drop Down List** as the GUI type. You then must add an option group, that is, the set of choices on the list.

TruCare comes with many options groups that you can choose from. For example, **YesNoUnsure** is an option group with three possible answers: Yes, No, and Unsure. See [Option groups \[71\]](#) for more information. If you do not see an option group that suits your needs, you can copy an existing group and modify it, or you can create a new group from scratch. In either case, use the **New Option Group** dialog box to build, order, and edit the list. For example, to build a new group that uses a drop-down list:

1. Select Clinical Configuration → Assessment Questions.
2. Select **Create New Question**.
3. Fill in the screen as described in [Create a basic question](#).
4. For **GUI Type**, select **Drop Down List**.
5. You can select an option group from the **Option Group** library. Alternatively, add your own. Select **New Group**.
6. In the **New Option Group** box, enter the name of your new group. Give it an intuitive name so that it's a useful part of your library.
7. Select the plus sign for each option you want to add and enter the option text in the text box.
  - Use the up and down arrows to reorder the list.
  - Select the red **x** next to an option to remove it.
8. Select **Submit**.
9. On the **Create Assessment Questions** screen, select **Submit**.

## Option group

### Option groups

You can use any of these supplied option groups as possible answers to your questions.

If you want to use or copy a supplied option group, the table shows the list of groups and the answers associated with each option group.

Option group name	Option
AbilityEverydayActivities	Excellent; Good; Mildly Impaired; Moderately Impaired; Other; Severely Impaired; Totally Impaired
ActivityDifficulty	No difficulty; Significant Difficulty; Some Difficulty; Unable
ActivityDifficultyHRA	A little difficulty; A lot of difficulty; No difficulty; Not able to do so; Some difficulty
ADLStatus	Independent; Partial assist; Dependent
Age	20 or younger; 21-29; 30 or older
AgeFirstChildAdult	NA; 18 or younger; 19-35; 36 or older

Option group name	Option
AgeFirstChildPedi	N/A; <14; 15-17; >17
AltTherapy	Acupuncture; Acupressure; Chiropractic; Massage Therapy; Hot/Cold Treatment; TENS; Other
AmbulatoryStatus	Independent; Minimal assistance; Nonambulatory (i.e. wheelchair); Bedbound; Other
Assistive Devices	Wheelchair; Walker; Cane; Stair Glide; Ramp; Shower/Tub Chair; Commode; Safety Rails; Other
BabyFeeding	Breast; Bottle; NG Tube; TPN; Other
BloodSugarTest	Daily; >2 times per day; Weekly; Infrequently; Does not test; Other
ChangeFromLastReview	Increased; Decreased; Same
ChemicalDependSymptoms	Increased energy; Speech Disturbances; Impaired Judgement; Increased/Decreased Sexuality; Altered Thought Patterns; Mood Swings; Changes in Perception; Emotional Pain; Excess Anger`
ChemicalDepProvider	Medical Doctor; Psychiatrist; LSW; Nurse Practitioner; Counselor; Psychologist; Addiction Med Specialist; Other Professional
ChildGender	Male; Female; Unknown
CognitiveStatus	Alert/Oriented; Occasional forgetfulness; Significant memory loss
CompletedWith	Member; Authorized Representative of Member
CondomUse	100% condom use; Occasional condom use; Do not use condoms
ContactSuccess	Successful; Left Voicemail; Unsuccessful
CoordinationOfCare	High; Moderate; Low
DiabeticUlcerClass	Pre-/post ulcerative lesion; Superficial wound; Wound penetrating to tendon or capsule; Wound penetrating to bone or joint
DrugTypePartD	Chronic/Maintenance; Disease Specific; N/A; Other
Education	Grade School or Less; Some High School; HS Grad/GED; Some College; College Graduate; Post-Graduate; Professional Degree
EmploymentIncentive	Vocational Rehab; Educational/Training Program; Job Search Support; Ticket to Work; Other
EmploymentSupport	Job Search Support; Job Skills Training; On-the-Job Training; Community Service Program; Learning Disability Assessment; Vocational Rehab Services; GED testing; English as a Secondary Language (ESL) Training; Young Parents Literacy & Skills Training; Other
ETOHEmploymentHistory	Steadily employed; Unemployed >50% of the time; Unemployed <50% of the time; Fired from 1 or more jobs; Unemployed - not seeking work; Unemployed - seeking work; Student
ETOHFrequencyWeek	None; 1 to 7; 8 to 14; > 14
EvidenceInfection	Induration; Purulent drainage; Foul odor; Increased pain; Fever; Other
Exudate Amount	Heavy; Moderate; Scant; None
Exudate Type	Serous; Serosanguinous; Sanguinous; Purulent
Feet	3; 4; 5; 6; 7; 8
FollowUpStatus	Improved; Worsened; Remained the same
FosterCareArrangement	Relative foster care; Non-relative foster care; Foster care group home; Other
Frequency	Always; Sometimes; Never

Option group name	Option
FrequencyFoodType	Rarely or never; Occasionally; Less than once per day; 1 to 2 times per day; 3 to 4 times per day; 5 or more times per day
Gender	Male; Female; Undetermined
GestationalAge	1; 2; 3; 4; 5; 6; 7; 8; 9; 10; 11; 12; 13; 14; 15; 16; 17; 18; 19; 20; 21; 22; 23; 24; 25; 26; 27; 28; 29; 30; 31; 32; 33; 34; 35; 36
Gravida	1; 2; 3; 4; 5; 6; 7; 8; 9; 10; 11; 12; 13; 14; 15; 16; 17; 18; 19; 20
HealthRating	Excellent; Very Good; Good; Fair; Poor
HighMediumLow	High; Medium; Low
HighModerateLow	High; Moderate; Low
HighModerateLowNone	High; Moderate; Low; None
HomeEquipment	None; Glucose meter; Blood pressure cuff; Spacer; Peak flow meter; Inhalation equipment; Scale; Other
HoursSleep	Less than 5; More than 5 hours but less than 7 hours; 7 to 8 hours; More than 8 hours
HowFeeling	Very concerned and worried; Moderately concerned or worried; Neither concerned nor optimistic; Moderately optimistic; Very optimistic
HowLearns	Doing; Listening; Reading; Watching
HowLongTransplantProgram	< 6 months; Within the last year; > 1 year; N/A
HowOften	Not At All; Several Days; More Than Half The Days; Nearly Everyday
HowOftenFrequency	Never; Occasionally; Weekly; Daily; Several times per day
HowOftenInterferes	All of the time; Most of the time; Some of the time; A little of the time; None of the time
HowOftenStressed	Never; Occasionally; Frequently; All of the time
HRAChildCompletedWith	Child; Parent; Legal Guardian; Friend; Sibling; Other
HRA MealsPerDay	Fewer than 3; 3; 4 to 6; More than 6
HRAWorkStatus	Employed; Unemployed; Fulltime parent/caregiver; On disability; Student; Retired; Other
Impaired	None; Minimally Impaired; Moderately Impaired; Majorly Impaired
ImpairedSchoolPerform	No impairment; A little impairment; Moderate impairment; Quite a lot of impairment; Major impairment
Inches	1; 2; 3; 4; 5; 6; 7; 8; 9; 10; 11
InterfereMedsFollowUp	Forgets to take meds; Forgets to refill prescription on time; Doubts value of med; Visual Problems; Med side effects; Difficulty opening pill bottles; Concerns about drug safety; Language barrier; Confused; Other
InterfereTakingMeds	Side effects; Difficulty opening pill bottles; Concerns about drug safety; Doubts value of med; Visual Problems; Language barrier; Confused
Job Accommodation	Job Restructuring; Modified Work Schedule; Job Reassignment; Other
LengthLimitedActivity	Years; Months; Weeks; Days; Unsure
LengthTime	<1 month; 1-3 months; 4-6 months; 7-12 months; > 12 months
LiveBirths	N/A; 1; 2; 3; 4; 5; 6; 7; 8; 9; 10

Option group name	Option
LivesWith	Lives with Sibling; Lives with Grandparent; Adopted; In Foster Care; Lives in Group Home/Institution; Other
Living Arrangement	Lives alone; Lives with family; Lives with non-family caregiver; Lives with friends; Lives in institution; Lives in shelter; Homeless; Other
Lochia	Lochia Rubra; Lochia Serosa; Lochia Alba
ManageStress	Can't seem to manage; Some difficulty managing; Manage reasonably well; Excellent management skills
MaritalStatus	Single; Married/Domestic Partner; Separated; Divorced; Widowed
MaternalInfantBonding	Adjusting well; Having some difficulties; Minimal or no bond
MedicalStability	Unstable; Somewhat Stable; Stable
MedMgt	Skipping doses; Substituting meds; Postponing refills of scripts; Taking half doses
MemberControl	None; Some; A great amount; Refused to answer
MenopauseAge	40 or younger; 41-50; 51-55; 56 or older
MensusAge	11 or younger; 12-13; 14 or older; n/a
Mood	Severe mania; Mild to moderate mania; Balanced mood; Mild to moderate depression; Severe depression
NumberPhysicians	None; 1; <3; 3 to 4; >4
NYHAClass	Class I; Class II; Class III; Class IV
PainInterferes	Not at all; A little bit; Moderately; Quite a bit; Extremely
PapResult	Normal; Abnormal; Not Sure
PediEducation	Pre-School; Elementary School; MiddleSchool; High School; High School Grad/GED; Some College/Technical School; N/A
PediResidence	Family owned home; Rental; Temporary housing; Staying with friends/family; Assisted Living; Homeless; Group home; Other
PediWorkStatus	Full-time; Part-time; Unemployed; N/A
PerDay	< 3; 3; 4-6; > 6
PeriWound	Normal/pink; Bright red/blanches to touch; White/gray pallor (or hyperpigmented); Dark red/purple (non-blanchable); Black/hyperpigmented
PHIReceiver	Member; Caregiver; No One; Other
PhoneInPersonEmail	Phone; In Person; Email
PlannedTypeDelivery	Vaginal; C-Section; Unsure
PregnancyHx	N/A; 1; 2; 3; 4; 5; 6; 7; 8; 9; 10; 11; 12; 13; 14; 15; 16; 17; 18; 19; 20
PressureUlcerStage	Suspected deep tissue injury; Intact skin with non-blanchable redness of localized area (Stage I); Partial thickness loss of dermis (Stage II); Full thickness tissue loss (Stage III); Full thickness loss with exposed bone, tendon or muscle (Stage IV); Unable to stage
Provider	Medical Doctor; Psychiatrist; LSW; Nurse Practitioner; Counselor; Psychologist; Other Professional
QualityLifeADLStatus	Independent; Partial assist; Dependent; Refused to answer
QualityLifeHealthStatus	Excellent; Good; Mildly Impaired; Moderately Impaired; Severely Impaired; Totally Impaired; Other; Refused to answer
QualityLifeHowOften	Not At All; Several Days; More Than Half The Days; Nearly Everyday; Refused to answer
QualityLifeLimitedActivity	Years; Months; Weeks; Days; Don't Know; Refused to answer

Option group name	Option
QualityLifeLivingWith	Lives alone; Lives with Spouse; Lives with spouse & children; Lives with children; Other; Refused to answer
QualityLifeResidence	Owns Home; Rents; Temporary housing; Staying with friends/family; Assisted Living; Homeless; Group home; Other; Refused to answer
QualityLifeSocialSupport	High; Above average; Average; Below average; None; Other; Refused to answer
QuiteALotSomewhatNaa	Quite A Lot; Somewhat; Not At All
Rating	Excellent; Good; Fair; Poor
Relationship	Parent; Guardian; Spouse; Friend; Lawyer; Provider; Other
Residence	Owns Home; Rents; Temporary housing; Staying with friends/Family; Assisted Living; Homeless; Group home; Other
ResourceAvailability	Necessary resources not available/in place; Limited resources available/ineffective resources in place; Current resources in place/adequate & no additional resources needed
RiskForOsteo	Bone exposed; Tissue necrosis overlying bone; Gangrene; Persistent sinus tract; Wound recurrence; Other
Scale	1; 2; 3; 4; 5; 6; 7; 8; 9; 10
SeniorRelationship	Spouse; Child; Guardian; Friend; Provider
Status	Decreased; Remained the same; Increased
StemCellType	Autologous; Allogeneic; Nonmyeloablative Allogeneic (Mini-Allogeneic)
SuicideAttempt	Impulsive; Planned
TimesExerciseWeek	None; 1 to 2 times; 3 to 4 times; 5 or more times
TimesUtilizedServices	0; 1; 2; More than 2
TobaccoUse	Never used; Current user trying to quit; Current user not trying to quit; Previous user
TrackMeds	Written chart; Day of the week pill tray; Count pills remaining in bottle; Electronic reminder; Another person administers the meds; Not keeping track
TransplantProcess	Pre-Transplant Work Up; Transplant Approved; Post Transplant
TransplantType	Heart; Lung; Lung-Single; Lung-Double; Heart/Lung; Living Lobar Lung; Kidney-Cadaver; Kidney-Living Donor; Liver/Kidney; Liver-Living Donor; Liver-Cadaver; Intestinal/Multi-Visceral; Islet Cell Pancreas; Pancreas; Pancreas after Kidney; Simultaneous Kidney/Pancreas; Small Intestine; Multi-Organ; Stem Cell; Other
Transportation	Taxi; Family/Friends; Bus; Ambulance; Wheelchair Van; Special Transit; Member; Other
TreatmentCompliance	Significant compliance issues present; Ongoing monitoring for compliance needed; No significant compliance issues present
TypeDelivery	Vaginal; Planned C-Section; Emergency C-Section
VerySomewhatNaa	Very; Somewhat; Not At All
VerySomewhatNaaRefused	Very; Somewhat; Not At All; Refused to answer
WaistMeasurement	<31 inches; 31 to 35 inches; 36 to 40 inches; > 40 inches
WatchChildren	Boyfriend/Girlfriend; Spouse; Children's Mother/Father; Family Member; Friend; Child Care Center; Baby Sitter; No One; Other

Option group name	Option
WillingToChange	Unwilling or unable to change; Considering possibility of change but ambivalent/uncertain; Committed to making change in near future, but still considering what to do; Actively taking steps toward change; Has achieved initial goals and working on maintaining the change(s)
WorkStatus	Full-Time; Part-Time; Unemployed; Family Medical Leave; Workers' compensation; Retired; Temporarily Disabled; Permanently Disabled; Other
WoundBed	Epithelial; Granulation; Slough; Necrotic
WoundBedChange	Increased granulation tissue; Decreased granulation tissue; Increased necrotic tissue; Decreased necrotic tissue; Friable granulation tissue; Other
WoundEdgeQuality	Indistinct/diffuse; Attached; Not attached; Rolled under; Fibrotic/scarred; Hyperkeratotic
WoundHealingTime	< 6 months; 6 to 12 months; > 12 months
WoundLocation	Hip; Thigh; Leg; Ankle; Foot; Heel; Sacrum/Coccyx; Elbow; Other
WoundSurfaceArea	< 2.0; 2.1-4.0; 4.1-8.0; 8.1-16.0; 16.1-36.0; 36.1-80; > 80
WoundType	Neuropathic (e.g., diabetic) ulcer; Venous ulcer; Arterial ulcer; Pressure (decubitus) ulcer
YesNo	Yes; No
YesNoMaybe	Yes; No; Maybe
YesNoNa	Yes; No; N/A
YesNoRefused	Yes; No; Refused to answer
YesNoUnable	Yes; No; Unable to do
YesNoUnknown	Yes; No; Unknown
YesNoUnsure	Yes; No; Unsure

## Option groups

You can use any of these supplied option groups as possible answers to your questions.

If you want to use or copy a supplied option group, the table shows the list of groups and the answers associated with each option group.

Option group name	Option
AbilityEverydayActivities	Excellent; Good; Mildly Impaired; Moderately Impaired; Other; Severely Impaired; Totally Impaired
ActivityDifficulty	No difficulty; Significant Difficulty; Some Difficulty; Unable
ActivityDifficultyHRA	A little difficulty; A lot of difficulty; No difficulty; Not able to do so; Some difficulty
ADLStatus	Independent; Partial assist; Dependent
Age	20 or younger; 21-29; 30 or older
AgeFirstChildAdult	NA; 18 or younger; 19-35; 36 or older
AgeFirstChildPedi	N/A; <14; 15-17; >17
AltTherapy	Acupuncture; Acupressure; Chiropractic; Massage Therapy; Hot/Cold Treatment; TENS; Other
AmbulatoryStatus	Independent; Minimal assistance; Nonambulatory (i.e. wheelchair); Bedbound; Other
Assistive Devices	Wheelchair; Walker; Cane; Stair Glide; Ramp; Shower/Tub Chair; Commode; Safety Rails; Other

Option group name	Option
BabyFeeding	Breast; Bottle; NG Tube; TPN; Other
BloodSugarTest	Daily; >2 times per day; Weekly; Infrequently; Does not test; Other
ChangeFromLastReview	Increased; Decreased; Same
ChemicalDependSymptoms	Increased energy; Speech Disturbances; Impaired Judgement; Increased/Decreased Sexuality; Altered Thought Patterns; Mood Swings; Changes in Perception; Emotional Pain; Excess Anger`
ChemicalDepProvider	Medical Doctor; Psychiatrist; LSW; Nurse Practitioner; Counselor; Psychologist; Addiction Med Specialist; Other Professional
ChildGender	Male; Female; Unknown
CognitiveStatus	Alert/Oriented; Occasional forgetfulness; Significant memory loss
CompletedWith	Member; Authorized Representative of Member
CondomUse	100% condom use; Occasional condom use; Do not use condoms
ContactSuccess	Successful; Left Voicemail; Unsuccessful
CoordinationOfCare	High; Moderate; Low
DiabeticUlcerClass	Pre-/post ulcerative lesion; Superficial wound; Wound penetrating to tendon or capsule; Wound penetrating to bone or joint
DrugTypePartD	Chronic/Maintenance; Disease Specific; N/A; Other
Education	Grade School or Less; Some High School; HS Grad/GED; Some College; College Graduate; Post-Graduate; Professional Degree
EmploymentIncentive	Vocational Rehab; Educational/Training Program; Job Search Support; Ticket to Work; Other
EmploymentSupport	Job Search Support; Job Skills Training; On-the-Job Training; Community Service Program; Learning Disability Assessment; Vocational Rehab Services; GED testing; English as a Secondary Language (ESL) Training; Young Parents Literacy & Skills Training; Other
ETOHEmploymentHistory	Steadily employed; Unemployed >50% of the time; Unemployed <50% of the time; Fired from 1 or more jobs; Unemployed - not seeking work; Unemployed - seeking work; Student
ETOHFrequencyWeek	None; 1 to 7; 8 to 14; > 14
EvidenceInfection	Induration; Purulent drainage; Foul odor; Increased pain; Fever; Other
Exudate Amount	Heavy; Moderate; Scant; None
Exudate Type	Serous; Serosanguinous; Sanguinous; Purulent
Feet	3; 4; 5; 6; 7; 8
FollowUpStatus	Improved; Worsened; Remained the same
FosterCareArrangement	Relative foster care; Non-relative foster care; Foster care group home; Other
Frequency	Always; Sometimes; Never
FrequencyFoodType	Rarely or never; Occasionally; Less than once per day; 1 to 2 times per day; 3 to 4 times per day; 5 or more times per day
Gender	Male; Female; Undetermined
GestationalAge	1; 2; 3; 4; 5; 6; 7; 8; 9; 10; 11; 12; 13; 14; 15; 16; 17; 18; 19; 20; 21; 22; 23; 24; 25; 26; 27; 28; 29; 30; 31; 32; 33; 34; 35; 36
Gravida	1; 2; 3; 4; 5; 6; 7; 8; 9; 10; 11; 12; 13; 14; 15; 16; 17; 18; 19; 20
HealthRating	Excellent; Very Good; Good; Fair; Poor

Option group name	Option
HighMediumLow	High; Medium; Low
HighModerateLow	High; Moderate; Low
HighModerateLowNone	High; Moderate; Low; None
HomeEquipment	None; Glucose meter; Blood pressure cuff; Spacer; Peak flow meter; Inhalation equipment; Scale; Other
HoursSleep	Less than 5; More than 5 hours but less than 7 hours; 7 to 8 hours; More than 8 hours
HowFeeling	Very concerned and worried; Moderately concerned or worried; Neither concerned nor optimistic; Moderately optimistic; Very optimistic
HowLearns	Doing; Listening; Reading; Watching
HowLongTransplantProgram	< 6 months; Within the last year; > 1 year; N/A
HowOften	Not At All; Several Days; More Than Half The Days; Nearly Everyday
HowOftenFrequency	Never; Occasionally; Weekly; Daily; Several times per day
HowOftenInterferes	All of the time; Most of the time; Some of the time; A little of the time; None of the time
HowOftenStressed	Never; Occasionally; Frequently; All of the time
HRAChildCompletedWith	Child; Parent; Legal Guardian; Friend; Sibling; Other
HRA MealsPerDay	Fewer than 3; 3; 4 to 6; More than 6
HRAWorkStatus	Employed; Unemployed; Fulltime parent/caregiver; On disability; Student; Retired; Other
Impaired	None; Minimally Impaired; Moderately Impaired; Majorly Impaired
ImpairedSchoolPerform	No impairment; A little impairment; Moderate impairment; Quite a lot of impairment; Major impairment
Inches	1; 2; 3; 4; 5; 6; 7; 8; 9; 10; 11
InterfereMedsFollowUp	Forgets to take meds; Forgets to refill prescription on time; Doubts value of med; Visual Problems; Med side effects; Difficulty opening pill bottles; Concerns about drug safety; Language barrier; Confused; Other
InterfereTakingMeds	Side effects; Difficulty opening pill bottles; Concerns about drug safety; Doubts value of med; Visual Problems; Language barrier; Confused
Job Accommodation	Job Restructuring; Modified Work Schedule; Job Reassignment; Other
LengthLimitedActivity	Years; Months; Weeks; Days; Unsure
LengthTime	<1 month; 1-3 months; 4-6 months; 7-12 months; > 12 months
LiveBirths	N/A; 1; 2; 3; 4; 5; 6; 7; 8; 9; 10
LivesWith	Lives with Sibling; Lives with Grandparent; Adopted; In Foster Care; Lives in Group Home/Institution; Other
Living Arrangement	Lives alone; Lives with family; Lives with non-family caregiver; Lives with friends; Lives in institution; Lives in shelter; Homeless; Other
Lochia	Lochia Rubra; Lochia Serosa; Lochia Alba
ManageStress	Can't seem to manage; Some difficulty managing; Manage reasonably well; Excellent management skills

Option group name	Option
MaritalStatus	Single; Married/Domestic Partner; Separated; Divorced; Widowed
MaternalInfantBonding	Adjusting well; Having some difficulties; Minimal or no bond
MedicalStability	Unstable; Somewhat Stable; Stable
MedMgt	Skipping doses; Substituting meds; Postponing refills of scripts; Taking half doses
MemberControl	None; Some; A great amount; Refused to answer
MenopauseAge	40 or younger; 41-50; 51-55; 56 or older
MensusAge	11 or younger; 12-13; 14 or older; n/a
Mood	Severe mania; Mild to moderate mania; Balanced mood; Mild to moderate depression; Severe depression
NumberPhysicians	None; 1; <3; 3 to 4; >4
NYHAClass	Class I; Class II; Class III; Class IV
PainInterferes	Not at all; A little bit; Moderately; Quite a bit; Extremely
PapResult	Normal; Abnormal; Not Sure
PediEducation	Pre-School; Elementary School; MiddleSchool; High School; High School Grad/GED; Some College/Technical School; N/A
PediResidence	Family owned home; Rental; Temporary housing; Staying with friends/family; Assisted Living; Homeless; Group home; Other
PediWorkStatus	Full-time; Part-time; Unemployed; N/A
PerDay	< 3; 3; 4-6; > 6
Periwound	Normal/pink; Bright red/blanches to touch; White/gray pallor (or hyperpigmented); Dark red/purple (non-blanchable); Black/hyperpigmented
PHIReceiver	Member; Caregiver; No One; Other
PhoneInPersonEmail	Phone; In Person; Email
PlannedTypeDelivery	Vaginal; C-Section; Unsure
PregnancyHx	N/A; 1; 2; 3; 4; 5; 6; 7; 8; 9; 10; 11; 12; 13; 14; 15; 16; 17; 18; 19; 20
PressureUlcerStage	Suspected deep tissue injury; Intact skin with non-blanchable redness of localized area (Stage I); Partial thickness loss of dermis (Stage II); Full thickness tissue loss (Stage III); Full thickness loss with exposed bone, tendon or muscle (Stage IV); Unable to stage
Provider	Medical Doctor; Psychiatrist; LSW; Nurse Practitioner; Counselor; Psychologist; Other Professional
QualityLifeADLStatus	Independent; Partial assist; Dependent; Refused to answer
QualityLifeHealthStatus	Excellent; Good; Mildly Impaired; Moderately Impaired; Severely Impaired; Totally Impaired; Other; Refused to answer
QualityLifeHowOften	Not At All; Several Days; More Than Half The Days; Nearly Everyday; Refused to answer
QualityLifeLimitedActivity	Years; Months; Weeks; Days; Don't Know; Refused to answer
QualityLifeLivingWith	Lives alone; Lives with Spouse; Lives with spouse & children; Lives with children; Other; Refused to answer
QualityLifeResidence	Owns Home; Rents; Temporary housing; Staying with friends/family; Assisted Living; Homeless; Group home; Other; Refused to answer
QualityLifeSocialSupport	High; Above average; Average; Below average; None; Other; Refused to answer
QuiteALotSomewhatNaa	Quite A Lot; Somewhat; Not At All

Option group name	Option
Rating	Excellent; Good; Fair; Poor
Relationship	Parent; Guardian; Spouse; Friend; Lawyer; Provider; Other
Residence	Owns Home; Rents; Temporary housing; Staying with friends/Family; Assisted Living; Homeless; Group home; Other
ResourceAvailability	Necessary resources not available/in place; Limited resources available/ineffective resources in place; Current resources in place/adequate & no additional resources needed
RiskForOsteo	Bone exposed; Tissue necrosis overlying bone; Gangrene; Persistent sinus tract; Wound recurrence; Other
Scale	1; 2; 3; 4; 5; 6; 7; 8; 9; 10
SeniorRelationship	Spouse; Child; Guardian; Friend; Provider
Status	Decreased; Remained the same; Increased
StemCellType	Autologous; Allogeneic; Nonmyeloablative Allogeneic (Mini-Allogeneic)
SuicideAttempt	Impulsive; Planned
TimesExerciseWeek	None; 1 to 2 times; 3 to 4 times; 5 or more times
TimesUtilizedServices	0; 1; 2; More than 2
TobaccoUse	Never used; Current user trying to quit; Current user not trying to quit; Previous user
TrackMeds	Written chart; Day of the week pill tray; Count pills remaining in bottle; Electronic reminder; Another person administers the meds; Not keeping track
TransplantProcess	Pre-Transplant Work Up; Transplant Approved; Post Transplant
TransplantType	Heart; Lung; Lung-Single; Lung-Double; Heart/Lung; Living Lobar Lung; Kidney-Cadaver; Kidney-Living Donor; Liver/Kidney; Liver-Living Donor; Liver-Cadaver; Intestinal/Multi-Visceral; Islet Cell Pancreas; Pancreas; Pancreas after Kidney; Simultaneous Kidney/Pancreas; Small Intestine; Multi-Organ; Stem Cell; Other
Transportation	Taxi; Family/Friends; Bus; Ambulance; Wheelchair Van; Special Transit; Member; Other
TreatmentCompliance	Significant compliance issues present; Ongoing monitoring for compliance needed; No significant compliance issues present
TypeDelivery	Vaginal; Planned C-Section; Emergency C-Section
VerySomewhatNaa	Very; Somewhat; Not At All
VerySomewhatNaaRefused	Very; Somewhat; Not At All; Refused to answer
WaistMeasurement	<31 inches; 31 to 35 inches; 36 to 40 inches; > 40 inches
WatchChildren	Boyfriend/Girlfriend; Spouse; Children's Mother/Father; Family Member; Friend; Child Care Center; Baby Sitter; No One; Other
WillingToChange	Unwilling or unable to change; Considering possibility of change but ambivalent/uncertain; Committed to making change in near future, but still considering what to do; Actively taking steps toward change; Has achieved initial goals and working on maintaining the change(s)
WorkStatus	Full-Time; Part-Time; Unemployed; Family Medical Leave; Workers' compensation; Retired; Temporarily Disabled; Permanently Disabled; Other
WoundBed	Epithelial; Granulation; Slough; Necrotic

Option group name	Option
WoundBedChange	Increased granulation tissue; Decreased granulation tissue; Increased necrotic tissue; Decreased necrotic tissue; Friable granulation tissue; Other
WoundEdgeQuality	Indistinct/diffuse; Attached; Not attached; Rolled under; Fibrotic/scarred; Hyperkeratotic
WoundHealingTime	< 6 months; 6 to 12 months; > 12 months
WoundLocation	Hip; Thigh; Leg; Ankle; Foot; Heel; Sacrum/Coccyx; Elbow; Other
WoundSurfaceArea	< 2.0; 2.1-4.0; 4.1-8.0; 8.1-16.0; 16.1-36.0; 36.1-80; > 80
WoundType	Neuropathic (e.g., diabetic) ulcer; Venous ulcer; Arterial ulcer; Pressure (decubitus) ulcer
YesNo	Yes; No
YesNoMaybe	Yes; No; Maybe
YesNoNa	Yes; No; N/A
YesNoRefused	Yes; No; Refused to answer
YesNoUnable	Yes; No; Unable to do
YesNoUnknown	Yes; No; Unknown
YesNoUnsure	Yes; No; Unsure

## Conditional logic in assessments

Conditional logic in assessments causes additional questions to appear based on how questions are answered.

TruCare incorporates conditional logic into assessment questions. You can configure questions so that specific responses cause one or more questions to be shown or removed, in a chain-like fashion.

When you configure a question, each response option that supports conditional logic (radio button, drop-down list, or vertical or three-column check box) allows you to add conditional questions triggered by that response.







## Node icon types

### Node icon types

Certain node icon types and colors indicate how each question is configured.

Green in an icon indicates the conditional logic is triggered.

**Table 21. Inheritance Options**

Icon	Description	Tool tip
	Question	Question
	Question with condition logic	
	Single-select answer option	Single-Select Answer Option
	Single-select answer option that triggers conditional questions	
	Multi-select answer option or single-check box question answer option	The tool tip depends on the configuration. Possibilities are: ▪ Multi-Select Answer Option
	Multi-select answer option or single-check box question answer option that triggers conditional questions	

Icon	Description	Tool tip
		<ul style="list-style-type: none"> <li>Single-Check box Question Displayed as Multi-Select Answer Option</li> <li>Single-Check box Question Answer Option</li> </ul>

## Node icon types

Certain node icon types and colors indicate how each question is configured.

Green in an icon indicates the conditional logic is triggered.

**Table 22. Inheritance Options**

Icon	Description	Tool tip
	Question	Question
	Question with condition logic	
	Single-select answer option	Single-Select Answer Option
	Single-select answer option that triggers conditional questions	
	Multi-select answer option or single-check box question answer option	The tool tip depends on the configuration. Possibilities are: <ul style="list-style-type: none"> <li>Multi-Select Answer Option</li> <li>Single-Check box Question Displayed as Multi-Select Answer Option</li> <li>Single-Check box Question Answer Option</li> </ul>
	Multi-select answer option or single-check box question answer option that triggers conditional questions	

## Add a conditional question

A conditional question is one in which the way the user enters the answer triggers another question.

Add a question that can trigger another question. For example, if there is a drop-down list in which one of the choices is **Other**, you might want to trigger a question that says **Please explain** with a text box for entering the answer.

Only some GUI types let you add conditional questions. Any type that allows multiple answers allows for conditional questions. Examples include vertical radio buttons, drop-down list, and three-column radio buttons. Examples of GUI types that do not allow for conditional questions include text field and phone number.

Before you start creating a question that has conditional questions, create the conditional questions or find ones in the library that suit your needs by searching in the library. Select Clinical Configuration → Assessment Questions to open the library.

Although you can create questions in the process of adding conditional questions, best practice is to plan and build your assessment from the bottom up.

1. Add a conditional question or find one in the library. Any question you add becomes part of the library. See [Create a basic question](#).
2. Create the parent question. Select Clinical Configuration → Assessment Questions, then select **Create New Question**.
3. Fill in the screen as described in [Add an option group to a question](#). Select a GUI type that supports conditional questions. Select or build an option group.

4. Select **Add conditional question** for any option that requires a conditional question.
5. Search for and select questions from the library. If you have not yet published your question, clear the **Only show published entries** check box. Select the **Only show entries with updates available** check box to find questions that were updated. A red flag appears in the Update column.
6. Select **Submit**.  
You return to the screen where you were building your conditional question.
7. Add more conditional questions as needed.
8. Select **Submit**.

## Version and update a published question

Version a published question before you update it. Then update the new version by making changes to it such as rewording questions, adding conditional questions, and pulling in changes from versioned conditional questions.

Questions that need to pull in updates are displayed with a red flag in the Update column. You can find them using the **Only show entries with updates available** check box to return the questions that need to be versioned and updated. In addition, while working on a question, selecting **View Version History and Links** displays a list of child questions and shows a red flag on the questions that were updated but not yet pulled into the parent question.

1. Select Clinical Configuration → Assessment Questions.
2. Search for the question you want to update.
3. From the search results, select the question name.
4. Create a new version. Select **Version**.  
The version number increments by one. The status changes from Published to Draft.
5. Enter a comment to describe your update.
6. Edit fields and add and remove questions as needed.
7. If the question contains conditional questions that are flagged, you can pull in the updates. Next to **Available Updates**, select **Update**. Alternatively, pull in all changes to the assessment, which versions and updates the element at each level.  
The flag next to updated questions turns green.
8. Select **Publish** if you want to publish the question. Alternatively, publishing a parent publishes all its children and their children.
9. Select **Submit**.  
If children also will be published, a prompt asks you to confirm. Select **Yes** to publish any the children.

## Create an assessment question group

An assessment group is a group of questions that you can add to an assessment.

Although you can create questions while you are building a question group or add them later, best practice is to create the questions first.

1. Click Clinical Configuration → Assessment Question Groups.
2. Click **Create New Question Group**.
3. Enter the name of the question group and an ID and specify any optional information.
4. Add a question. Click **Add question**.
5. From the library, search for the question you want to add. (If your question is not yet in the library, you can create it by clicking **Create New Question**.)
6. Select the check box next to each question you want to add and select **Submit**.
7. Add, remove, and reorder questions as needed.

8. If any of the questions need updates, a flag appears next to the question. If any flags appear, you can select **Update** next to **Available Updates**. Or, you can update the assessment, which versions and updates all of its children and their children.
9. Click **Submit**.

## Create a medication question group - medication management license only

A medication question group allows a user to select from a list of open medications that apply to the question group answers. A duplicate question group is created for each medication chosen with the medication name displaying underneath the medication question group title. When you add a medication group to any assessment, the list of open medications appears on each question group, whether it is designated a medication group or not. This feature is only available with Medi-Span® and the Medication Management License (MML).

You can create a medication-based questions why you are building a group or add them later, but the best practice is to create the medication-based question group first.

1. Select Clinical Configuration → Assessment Question Groups.
2. Click **Create New Question Group**.
3. Enter the name of the question group and an ID .
4. Check **Artifact - Based Question Group**.
5. Select the medication.
6. Specify any optional information.
7. Add a question. Click **Add question**.
8. From the library, search for the questions you want to add. (If your question is not yet in the library, you can create it by clicking **Create New Question**.)
9. Select the check box next to each question you want to add.
10. Select **Submit**.
11. Add, remove, and reorder questions as needed.
12. Click **Submit**.

## Version and update a published question

Version a published question before you update it. Then update the new version by making changes to it such as rewording questions, adding conditional questions, and pulling in changes from versioned conditional questions.

Questions that need to pull in updates are displayed with a red flag in the Update column. You can find them using the **Only show entries with updates available** check box to return the questions that need to be versioned and updated. In addition, while working on a question, selecting **View Version History and Links** displays a list of child questions and shows a red flag on the questions that were updated but not yet pulled into the parent question.

1. Select Clinical Configuration → Assessment Questions.
2. Search for the question you want to update.
3. From the search results, select the question name.
4. Create a new version. Select **Version**.

The version number increments by one. The status changes from Published to Draft.

5. Enter a comment to describe your update.
6. Edit fields and add and remove questions as needed.
7. If the question contains conditional questions that are flagged, you can pull in the updates. Next to **Available Updates**, select **Update**. Alternatively, pull in all changes to the assessment, which versions and updates the element at each level.

The flag next to updated questions turns green.

8. Select **Publish** if you want to publish the question. Alternatively, publishing a parent publishes all its children and their children.
9. Select **Submit**.  
If children also will be published, a prompt asks you to confirm. Select **Yes** to publish any the children.

## Define assessment scoring

Defining assessment scoring helps the user to know if the member's score is high, medium, or low.

You can assign points to questions in assessments. You can then define the threshold of what the scoring means for each question group. You can also define what the total from all groups means in terms of high, medium, and low. These scores appear in TruCare as the user performs the assessment and are saved with the assessment. Group scores appear at the top of the question group, and running assessment totals appear at the top of the assessment screen.

Start by assigning points to answers. Keep in mind the conditional questions and assign points to them as needed. Then define the meaning of the points for each question group. Knowing the potential high, medium, and low scores from all question groups, assign numbers to the Max High, Max Medium, and Max Low scores in the assessment.



### Note

Assessment scoring applies only to TruCare assessments, not to MCG assessments.

## Assign points to answers

You can assign points when the question has multiple possible answers, for example for a drop-down list or radio buttons.

1. Create or edit an assessment. Add question groups to the assessment. See [Create an assessment](#).
2. Click a question whose answers you want to assign points to.
3. For each answer, change the **Score** value to the desired number.
4. Assign points to more questions as needed.
5. Click **Submit**.

## Define scoring for a question group

Define scoring for a question group to determine what the user sees in TruCare as they complete the assessment.

When you define scoring, you can both set the threshold and specify the wording to appear in TruCare when that threshold is met. These words appear in parentheses at the top of the question group as the user performs the assessment.

You can use whatever wording you want to describe each threshold. For example, you can use High, Medium, and Low, or you can use something more meaningful to your organization and the question group.

1. Create or edit an assessment. Add question groups to the assessment. See [Create an assessment](#).
2. Click the question group name to expand that section of the assessment.
3. Click **Add Score**.
4. In the **Max Answer Value** column, select the value up to which the score applies.
5. In the **Score** column, enter the label you want to associate with that score. For example, enter High, Medium, or Low, or enter something more meaningful to your organization and

the question group. (You must enter text in the **Score** box for group scoring to show any effect in TruCare.

6. Add more scores as needed for each question group.
7. When you have finished adding scores, click **Submit**.

## Define scoring for an assessment

Enter thresholds for which the total of all points in all question groups in the assessment are considered high, medium, or low.

The running total and its scoring group appear at the top of the assessment as the user completes it and are saved with the assessment.

1. Create or edit an assessment. Add question groups to the assessment. See [Create an assessment](#).
2. Set **Max High Score**, **Max Medium Score**, and **Max Medium Score** to the threshold values. For example, if you want scores over 50 to show the total score as High, enter 50 in the box.
3. Complete creating or editing the assessment as needed, then click **Submit**.

## Assign points to answers

You can assign points when the question has multiple possible answers, for example for a drop-down list or radio buttons.

1. Create or edit an assessment. Add question groups to the assessment. See [Create an assessment](#).
2. Click a question whose answers you want to assign points to.
3. For each answer, change the **Score** value to the desired number.
4. Assign points to more questions as needed.
5. Click **Submit**.

## Define scoring for a question group

Define scoring for a question group to determine what the user sees in TruCare as they complete the assessment.

When you define scoring, you can both set the threshold and specify the wording to appear in TruCare when that threshold is met. These words appear in parentheses at the top of the question group as the user performs the assessment.

You can use whatever wording you want to describe each threshold. For example, you can use High, Medium, and Low, or you can use something more meaningful to your organization and the question group.

1. Create or edit an assessment. Add question groups to the assessment. See [Create an assessment](#).
2. Click the question group name to expand that section of the assessment.
3. Click **Add Score**.
4. In the **Max Answer Value** column, select the value up to which the score applies.
5. In the **Score** column, enter the label you want to associate with that score. For example, enter High, Medium, or Low, or enter something more meaningful to your organization and the question group. (You must enter text in the **Score** box for group scoring to show any effect in TruCare.
6. Add more scores as needed for each question group.
7. When you have finished adding scores, click **Submit**.

## Define scoring for an assessment

Enter thresholds for which the total of all points in all question groups in the assessment are considered high, medium, or low.

The running total and its scoring group appear at the top of the assessment as the user completes it and are saved with the assessment.

1. Create or edit an assessment. Add question groups to the assessment. See [Create an assessment](#).
2. Set **Max High Score**, **Max Medium Score**, and **Max Medium Score** to the threshold values. For example, if you want scores over 50 to show the total score as High, enter 50 in the box.
3. Complete creating or editing the assessment as needed, then click **Submit**.

## Preview and test an assessment

You can preview an assessment to see how it looks for users and to test submission of the assessment with any configurations that were added.

Conditional logic configuration elements work in preview mode.

1. Click Clinical Configuration → Assessments.
2. If necessary, search for the assessment you want to preview.
3. In the **Action** column next to the assessment, click **Preview**.
4. View the assessment by clicking through the question groups and questions. Enter information as needed to test your assessment.

Use the **Next Group** and **Prev Group** buttons at the top of the screen to navigate through the question groups and questions.

5. To view the triggered actions of the assessment based on the answers selected for the questions, click **Test Submit**.



### Note

**Test Submit** is not available for MCG assessments.

The triggered actions can include:

- **Tasks** tab — This tab includes a list of tasks and assessments to trigger.
  - **Care Plan Elements** tab — The tab includes a list of Care Plan Elements to trigger.
  - **Programs** tab — Initial, general, and specialty assessments configured to recommend programs based on assessment responses or set to assessment answer choices display a grid with the following information: **Program Name**, **Service Level**, **Program Family**, and **Associated Feature**.
6. To exit the **Test Submit Results** screen, click **OK**.
  7. To exit the **Preview Assessment** screen, click **Cancel**.

## Publish a draft assessment

Publish an assessment when you are ready to show it in TruCare.

After an assessment is published, you can no longer edit it other than to change its status to **Disabled**. However, you can create a new version of the assessment and update it. See [Version and update a published assessment](#). If the assessment contains question groups that were updated you must version and update the assessment before you publish it.

You can unpublish an assessment that you have not marked **Ready to Export**. See [Unpublish a TruCare assessment](#).

1. Click Clinical Configuration → Assessments.

2. Search for the assessment you want to publish, if necessary, and open it.
3. In the assessment, click **Edit**.
4. If a red flag appears next to any question groups, next to **Available Updates**, select **Update**.
5. Change the **Status** field from **Draft** to **Published**.
6. Respond **Yes** to the warning message that appears.  
If you choose **Yes**, the names of associated question groups and questions that are still in **Draft** status appear in red at the top of the assessment screen with the message that they will be published.
7. Click **Submit**.  
If you click **Submit** with draft question groups in the assessment, a pop-up screen asks if you want to proceed. If you choose **Yes**, the assessment is published as well as all of its question groups and questions.

## Next steps after publishing an assessment

After you publish an assessment, give permissions to the roles to use the new assessment and configure the assessment at the BHP.

To give permissions, use the non-screen permissions group of the programs you selected when you created the assessment.

1. Click User Management → Role Management.
2. Create a new role or edit an existing role.
3. Click the **Non-Screen Permissions** tab.
4. Expand the folder for the type of feature and program you created the assessment for. Select the assessment (and any other actions you want to associate with the care plan).
5. Click **Submit**.

For more information on role management, see [Role management](#).

You can configure the assessment at the BHP. This applies only to assessments with CM as their license feature.

1. Click Differential Care Management → Customer Setup.
2. Select the entity that you want to have access to the assessment.
3. Select CM as the license feature.
4. On the **Assessments** tab, click **Add/Override**.
5. Select the assessment tab. Then, from the **Assessment** list, select your assessment.
6. Fill in the rest of the dialog box and click **Submit**.

For more information on customer setup, see [Configuring CM customer setup options](#).

## Unpublish a TruCare assessment

Under certain circumstances, you can unpublish an assessment.

In a Golden Configuration environment, you can unpublish an assessment definition before you mark it **Ready To Export**. Unpublishing puts the assessment back in the **Draft** status. All instance data (related to the assessment definition) created in a Golden Configuration using TruCare is removed when it is unpublished. This includes assessments and related care plan elements.

Unpublishing a versioned artifact reverts the artifact to its previous published version. For example, if version 3 of an assessment is unpublished, the latest published version of the assessment reverts to version 2.

Unpublishing an assessment removes all care plan elements (problems, objectives, and actions) that were triggered from the assessment whether they are in a care plan or the care plan builder. Related task data is not removed.

You can unpublish an assessment only if it meets all of the following criteria:

- It is published.
  - It is not marked as Disabled, Draft, or Ready to Export.
  - It has been removed from all related assessment task actions.
  - It is not triggered from another draft assessment.
  - It is not the only initial or general assessment available at the BHP or parent node.
  - It is not being used by other published or disabled entities, such as a task definition or another assessment.
  - It was not yet exported to a production environment.
1. Click Clinical Configuration → Assessments.
  2. Search for the assessment you want to unpublish.
  3. In the **Assessment** column, click the name of the assessment you want to unpublish.
  4. Click **Edit**.



### Note

Do not make any other changes on this screen as they are canceled when the assessment is unpublished.

5. Click **Unpublish Assessment Definition**.
6. Respond **Yes** to the message that appears.
7. Click **Submit**.

## Disable an assessment

You can disable published assessments. Disabled assessments no longer appear in TruCare.

You cannot disable an assessment if it is used by another artifact, such as a task definition or another assessment.

After you disable an assessment, you can publish it again to re-enable it.

1. Select Clinical Configuration → Assessments.
2. Search for the assessment you want to disable.
3. In the **Assessment** column, select the name of the assessment you want to disable.
4. Select **Edit**.
5. Select **Disable** for the **Status**.  
A warning message opens.
6. To disable the assessment, select **Yes**.
7. To save your edits, select **Submit**.

## Create an assessment with flagged question groups

Flagged question groups are groups that have updated content. If your new assessment contains flagged question groups, pull the latest changes into the assessment before you submit the new assessment.

1. Select Clinical Configuration → Assessments.
2. Select **Create New Assessment**.
3. Complete the fields as described in [Assessment options](#).
4. Start to add a question group. Select **Add Question Group**.
5. Search for the question group.

If the question group is not yet published, clear the **Only show published entries** check box. To exclude questions that need to be updated, select **Only show entries with updates available**.

6. Select the check box next to each question group that you want to add and select **Submit**. Each flagged question group shows a red flag in the assessment.  
Complete the assessment as needed. For example, you can reorder, add, and remove question groups. Also complete any configuration of question groups and individual questions. The configuration includes scoring and items that can be triggered. See [Define assessment scoring](#) and [Define items to trigger based on assessment questions](#).
7. Next to **Available Updates**, select **Update**.
8. The flag next to each flagged question group changes to green to indicate it was updated. Selecting **Update** on the assessment also pulls in updates to all of the assessment's children and their children.
9. If your assessment is ready to publish, select **Publish** and respond **Yes** to the prompt.
10. A warning states that child elements will also be published. To ensure that all updates are included in the published assessment, select **Yes**.
11. Select **Submit**.  
If you selected **Publish**, all children and their children are published as well. A message prompts you to confirm that you want to publish them. Select **Yes** to publish all the children and their children.

## Version and update a published assessment

Version a published assessment before you update it. Then update the new version by making changes to it such as adding and removing question groups and pulling in changes from question groups.

You can find assessments that need to pull in updates by searching for assessments with a red flag in the Update column. When searching, use the **Only show entries with updates available** check box to return the assessments that need to be versioned and updated. In addition, while working on the assessment, selecting **View Version History and Links** displays a list of all child questions in alphanumeric order and shows a red flag on the question groups and questions that were updated but not yet pulled into the assessment.

You can pull in updates from all children and their children, which versions and updates the elements at each level as needed. For that reason, it makes sense to make any changes to the lower levels before versioning and updating the assessment.

1. Select Clinical Configuration → Assessments.
2. Search for the assessment you want to update. Select the **Only show entries with updates available** check box to find assessments that need to be versioned and updated because question groups were updated. A red flag appears in the Update column.
3. From the search results, select the assessment name.
4. Create a new version. Select **Version**.  
The version number increments by one. The status changes from **Published** to **Draft**.
5. Enter a comment to describe your update.
6. Edit fields and add and remove question groups as needed. For more information on the fields, see [Assessment options](#).
7. If the assessment contains question groups that are flagged, pull in the updates. Next to **Available Updates**, select **Update**.  
The flag next to updated question groups turns green.
8. Select **Publish** to publish the assessment again and make the newest version available in TruCare. When you publish an assessment, you publish all of its children and their children.
9. Select **Submit**.  
If children will also be published, a prompt asks you to confirm. Select **Yes** to publish all the children and their children.

## Configure a question in a question group in an assessment

Configure a question group with properties such as whether the question is required or prepopulates with duplicate answers.

- You can configure questions in a question group after you add them to a TruCare assessment.
- You can configure questions when creating or copying an assessment or when editing an assessment.

For information on the configuring scoring, see [Define assessment scoring](#).

1. Click Clinical Configuration → Assessments.
2. Create or edit an assessment. Add question groups to the assessment. See [Create an assessment](#).
3. Click the name of the question group to expand the details.
4. Click the question you want to configure.
5. In the **Configure Assessment Question** screen, configure the following.
  - **Required** — Check this box to make the question required when the user performs the assessment in TruCare. This check box is available when the question is not defined as a check box or label.
  - **Prepopulate** — If the member has already answered this question in another assessment, checking this box fills in each instance of the question with the information that the member already provided. You can automate turning this check box on or off for all questions in an assessment by clicking the **Set All Questions to Prepopulate** or **Set all Questions to Not Prepopulate** on the assessment creation screen.
  - **Assessment Triggerables** and **Score** — See [Define assessment scoring](#).
  - **Post Condition** — If **Display Details** is selected, a **Details** field appears when the selected answer is given for the question. This allows the user to enter comments as they perform the assessment. You cannot configure this field for questions that have a text or numeric answer such a date or phone number.
6. Click **Save**.
7. Complete creating or editing the assessment as necessary.
8. Click **Submit**.

## Define items to trigger based on assessment questions

You can select items to trigger based on an answer choice when creating or editing an assessment.

You can select care plan elements, tasks, and programs to associate with a trigger.

- You can add or remove items only before the assessment is published.
- Once you have published the assessment, you cannot change the items to trigger unless you unpublish the assessment.

When the user submits an assessment, the system shows all the items that were triggered based on the responses given for each of the assessment questions.



### Note

This procedure does not apply to MCG assessments.

1. Create or edit an assessment and add the question groups to it. See [Create an assessment](#).
2. Click the name of a question group to expand the details.

3. Click the name of the question you want to configure.
4. In the row of the answer you want to be the trigger, click **Select Items To Be Triggered**.
5. Use the three tabs to select the care plan elements, tasks, and programs to associate with the trigger.

You can trigger these items:

- **Care Plan Elements** — You can select triggered problems and actions. When there are new versions for these artifacts — or in the case of an Assessment Task action when there is a new version of the assessment triggered by the action — a new version of the assessment will need to be created and then updated to pull in the latest versions of the problems and actions.
- **Tasks** — Use this tab to trigger tasks from an assessment without adding them to a care plan. You can configure tasks so that users can edit them before they are triggered in TruCare.
  - **Care plan action to trigger a specialty assessment** — The assessment will automatically update to use the latest published version of the linked or triggered assessment. You do not need to take any action for this process to occur.
- **Another specialty assessment** — You can trigger specialty assessments in these ways:
  - **As a care plan element action** — You can configure an assessment task to trigger a specialty assessment.
  - **As an assessment task** — You can trigger a specialty assessment task from an initial, general, or specialty assessment without the need to add it to an existing care plan.
 

This trigger does not open the **Select Items to be Triggered** dialog box and generates only a task to complete the triggered specialty assessment, not the assessment itself.

Set the specialty assessment to **Publish** before you configure it as triggered from another assessment.

The assessment will automatically use the latest published version of the linked or triggered assessment. You do not need to take any action for this process to occur.
- **Programs** — Use this tab to trigger a recommendation to enroll the member in the selected programs. You can trigger up to five programs. You can trigger only published programs.
  - For a general or initial assessment, the programs option is always available. (Triggering programs based on answer choices does not apply to MCG assessments.)
  - For specialty assessments, this tab is available only if **Assessment Answer Choices** is selected for the **Recommend Programs Based On** setting.
  - The **Programs** tab is not available for specialty assessments that have **Recommend Programs based on** set to **Selected Programs**. (For MCG assessments, this defaults to **Selected Programs**.)

6. Click **Save**.
7. In the **Configure Assessment Question** dialog box, click **Save**.
8. Complete the assessment as needed.
9. Click **Submit**.

## Create Assessment

To create an Assessment

1. Navigate to Care Management → Assessment → Assessments.  
The Assessments summary page is displayed.
2. Click Create Assessment.
3. The Assessments page displayed the following options:

- Assessment Library Name
- Assessment Library ID
- Version Comment
- Type
- Feature
- Programs
- Notes Definition
- Allow Users To Edit Task Before Triggering
- Target Publish Date
- Max High Score
- Max Medium Score
- Max Low Score
- Ready To Export
- Question Groups



### Note

You may also choose to add or create questions, question groups, set up triggerable actions, create or add notes definitions.

4. Click Submit.



### Note

To generate a draft assessment, click Save.

A confirmation message is displayed.

5. Click Yes.

## Assessment options

When creating an assessment, select from these options.

### Assessment

Enter a name to identify the assessment.

### ID

Enter a unique alphanumeric value. Do not use apostrophes (') or spaces.

### Version

Number of the version. When creating an assessment, the version is 1. This is a read-only field and increments by one every time you version the assessment.

### Comment

Enter a comment of up to 255 characters that describes the version of the assessment.

### Available Updates

This number indicates how many child question groups, questions, problems, actions, and notes have new versions available.

### Source

This read-only field indicates the source of the assessment.

## Custom

This field indicates if the assessment is custom (created by a TruCare administrator in TruCare Admin) or out-of-the-box.

## Type

- If the assessment is an initial member assessment, select **Initial**.
- If the assessment is a general health or general health risk assessment, select **General**.
- If the assessment is a specialty assessment for a chronic or specific condition, select **Specialty**.

## MCG Content Version

This field indicates the version of MCG content the assessment is from. When the assessment is created in TruCare, the version is N/A.

## Feature

Use the drop-down list to select the license feature with which to associate the assessment (AAG, Analytics, CM, DM, Employer Portal, HCS, Member Portal, Provider Portal, Reporting, TruCare Remote, UM, or Wellness).

## Programs

When you select CM, DM, or UM, as the feature, the **Programs** drop-down list becomes active for you to select the programs to associate with that assessment.



### Note

If you do not select any programs to associate with a specialty assessment, the program enrollment section is not shown for that assessment in TruCare. For details, refer to the information on completing assessments in the [TruCare User Guide](#)

## Recommend Programs Based On

You can configure specialty assessments to recommend programs based on these options:

- **Selected Programs** — When you select this option, the list of programs in which the user can enroll the member includes only programs selected for the license features. When the user selects this option and completes the assessment in TruCare, the program does not trigger any of the associated task packages.
- **Assessment Answer Choices** — When you select this option, the list of programs in which the user can enroll the member is determined by the program recommendations configured from one or more assessment answer choices. When the user selects this option and completes the assessment in TruCare, the program triggers the associated task packages.



### Note

The **Recommended Programs Based On** configuration option applies only to specialty assessments. You can configure initial and general assessments only to recommend programs based on assessment answer choices.

## Status

- If you want to make the assessment available immediately, select **Publish**.
- If you want to publish the assessment later, select **Draft**.

For information on publishing assessments, see [About publish and ready to export](#).

## Target Publish Date

Use this field as a reminder to publish the new assessment by the specified date.

## Note Definitions

You can associate these notes with an assessment:

- This list comes from notes defined in the **Notes** section of **Clinical Configuration**.
- The license feature of the assessment must match the note definition to work properly.
- In TruCare Admin, **Assessment** and **Question Group** definition types are available for the license type of **HCS**.
- Highlight the note definition to select it.
- If you want to clear a selected note definition, hover over it and press .

## Max Scores

Use these scores to specify the threshold for which you want TruCare to report that the assessment has scored high, medium, and low. These scores take into account the answers to all questions in all question groups. For more information on scoring, see [Define assessment scoring](#).

## Allow Users To Edit Tasks Before Triggering

Enabling this option allows users to make changes to configured tasks when the assessment is complete and the task is triggered. When users double-clicks the task in the pop-up that appears, they can specify additional options and enter a description of the task.

If this option is not enabled (this is the default), then the tasks are triggered with the settings configured in TruCare Admin.

## Ready to Export

This check box identifies content that is ready for export.

- Select the **Ready To Export** check box to make the assessment viewable in other environments after the Import/Export process is run.
- Select the **Ready To Export** check box only after all edits are completed.
- You can designate as **Ready to Export** only artifacts that were published.
- When you select **Ready To Export** on an assessment, all related artifacts, including notes, care plans, objectives, and actions are flagged as **Ready to Export** in a cascading manner.

For more information about how **Ready to Export** works, see [About publish and ready to export](#).

## Set All Questions to Prepopulate/Not Prepopulate

Click these buttons to select or clear the **Prepopulate** check box in all questions associated with the assessment, assuming they are in draft state and can be edited. You can check or clear the check box for each question (the default is checked) or you can check or clear the check box for all the questions at once using one of the two buttons.



### Note

The **Prepopulate** option is not available for medication-based questions (artifact type = Medication).

**Prepopulate** means that if the user asks a question more than once to the same member, the answer is filled with the same answer the member gave before. This is useful when multiple assessments reuse the same question group, saving the user from entering the same information once.

Perform this operation once all your questions are in place so you can ensure that all the questions in the assessment are affected.



## Note

If the TruCare version is upgraded, the prepopulate status is selected for all questions.

# View Assessments

To view Assessments

1. Navigate to Care Management → Assessments.
2. Click Assessments tab.  
The Assessments summary page is displayed.
3. To view Assessment Library Detail:
  - In the Actions column, click > View.  
The Assessment Library Detail page is displayed.
4. The following columns are displayed on the assessment page:
  - Assessment Name
  - Assessment ID
  - Status
  - Version
  - MCG Version
  - Type
  - Updates



## Note

An Update Available label is displayed in the Question Group category.

- Action



## Tip

To view **Version History**:

1. In the Actions column, click > View.
2. Click the Version History tab.  
The Versions pane is displayed.
3. Click the appropriate version to view the information.
4. To return to the Assessments page, click Close.



## Tip

To view **Child Links**:

1. In the Actions column, click > View.
2. Click the Child Links tab.  
The Versions pane is displayed.
3. Click the appropriate version to view the information.
4. To return to the Assessments page, click Close.

**Tip**

To view **Parent Links**:

1. In the Actions column, click **:** > View.
2. Click the Parent Links tab.  
The Versions pane is displayed.
3. Click the appropriate version to view the information.
4. To return to the Assessments page, click Close.

**Note**

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## Preview an Assessment

To Preview an Assessment

1. Navigate to Care Management → Assessments.
2. Click Assessments tab.  
The Assessments summary page is displayed.
3. To preview an Assessment:
  - In the Actions column, click **:** > Preview.  
The Assessment preview page is displayed.
4. Preview the Assessment and click Test Submit.

## Copy Assessment

To Copy Assessment

1. Navigate to Care Management > Assessments.  
The Assessment summary page is displayed.
2. In the Actions column, click **:** > Copy.  
The Copy Assessment page is displayed.
3. Click Submit.  
An Assessment Created Successfully message is displayed.

A Copy of the appropriate assessment is created.

## Edit an Assessment


To Edit Assessment

1. Navigate to Care Management > Assessments.  
The Assessment summary page is displayed.
2. In the Actions column, click **:** > Edit.  
The Edit Assessment page is displayed.
3. Click Submit.  
An Assessment edited Successfully message is displayed.

A Edit of the appropriate question is created.


## Delete or Discard Assessment

To Delete or Discard Assessment

1. Navigate to Care Management > Assessments.  
The View Assessments page is displayed.
2. Select an Assessment in Draft status.
3. In the Actions column, click  > View.
4. Click Discard Draft.  
A Discard Assessment Draft message is displayed.
5. Click Yes.  
The Assessment is deleted or discarded from the Assessments Summary page.

## Unpublish or Deactivate Assessments

To Unpublish or Deactivate Assessments

1. Navigate to Care Management → Assessments → Assessments.  
The Assessments summary page is displayed.
2. In the Actions column, click  > Edit.  
The Edit Assessments page is displayed.
3. Click Unpublish or Deactivate.  
An Unpublish or Deactivate confirmation message is displayed.
4. Click Yes.  
A Assessment has been unpublished or Deactivated successfully message is displayed.  
The status changes to Draft or Deactivated for the appropriate Assessment.

## Available Update – Assessment



### Note

The system displays available updates only when you perform one of the following actions:

- Unpublish
- Create Version
- Copy

To update an Assessment:

1. Navigate to Care Management > Assessments > Assessment.  
The Assessment summary page is displayed.
2. In the Actions column, click Edit.  
The Edit Assessment page is displayed.
3. Click Unpublish.  
A confirmation message is displayed.
4. Click Yes.  
The Assessment summary page is displayed.
5. In the Actions column, click Edit.  
The Edit Assessment page is displayed.
6. Hover over the appropriate question group and perform one of the following actions:
  - a. Delete - To remove a component from the group.
  - b. Insert - To add a component to the group.
  - c. Copy - To duplicate a component within the group.
7. Click Submit.

## Accept the Available Updates – Assessment

To accept the available updates in an Assessment



### Note

The Updates Available flag is no longer displayed after you accept the available updates.

1. Navigate to Care Management > Assessments > Assessment.  
The Assessment summary page is displayed.
2. Identify the Assessment with the Updates Available flag.
3. In the Actions column, click Edit.  
The Edit Assessment page is displayed.
4. Click Available Updates.  
The Updates pane is displayed.
5. Review the available updates and click Update.  
The confirmation message with changes to the child artifacts is displayed.
6. Click Yes.  
The Edit Assessment page is displayed.
7. Click Submit.  
The confirmation message is displayed.
8. Click Yes.

## View Version History, Parent Link, Child Link for an Assessment

**Prerequisites:** View a Assessment

Click one of the following options:

1. **Version History**
  1. The Version History pane is displayed.
  2. Review the required information.
  3. To return to the Assessment page, click Cancel
2. **Parent Link**
  1. The Parent Link Versions pane is displayed.
  2. Review the required information.
  3. To return to the Assessment page, click Cancel
3. **Child Link**
  1. The Child Link Versions pane is displayed.
  2. Review the required information.
  3. To return to the Assessment page, click Cancel

## Add Question

To Add Question to an Assessment

1. Navigate to Care Management > Assessments > Assessments.
2. Select an Assessment.
3. In the Actions column, click > Edit.  
The Edit Library Details page is displayed.
4. In the Question Groups section, click Create Question Groups.  
The Create Question Group pane is displayed.
5. Enter the required information in the Create Question Group pane.

6. In the Questions section, click Add Question.  
The Add Question pane is displayed.
7. Select the appropriate question and click Submit.
8. Click Submit on the Create Question Group pane.  
A confirmation message is displayed.
9. Click Yes.  
A Question Group created successfully message is displayed.
10. Select the Appropriate Question Group and click Submit.  
The page returns to the Create Library Details page.



### Note

To generate a draft assessment, click Save.

11. Click Submit

## Create an Assessment Library Version

**Prerequisite:** View an Assessment.



### Note



You can create a version of a component only when the component is in published status.

To create an Assessment Library Version

1. Click Create Version.  
The Create Version page is displayed.
2. Update the required information.
3. Click Submit.  
An Assessment Version Created Successfully message is displayed.

## View a Assessments Trigger Configuration Details

To view a Trigger Configuration Details

1. Navigate to Care Management → Assessments.
2. Click Assessments tab.  
The Assessments summary page is displayed.
3. In the Actions column, click  > View.  
The Assessments page is displayed.
4. In the Questions Group, expand the appropriate question group.
5. Expand the appropriate question.
6. Hover over the appropriate trigger.  
The View Trigger Configuration button is displayed.
7. Click View Trigger Configuration.  
The View Trigger Configuration pane is displayed.
8. Select the appropriate trigger.
9. In the appropriate Answer Assessment Triggers tab, expand the appropriate trigger.
10. In the Actions column, click .  
The View Detail pane is displayed.
11. Verify the Assessments Trigger Configuration Details.

12. Click Close to return to the View Trigger Configuration pane.

## Add a Trigger Configuration

**Prerequisites:** To create a trigger configuration, you may perform any one of the following actions

- Create an Assessment.
- Create an Assessment Version.
- Copy an Assessment.
- Edit an Action.

To add a trigger configuration

1. In the Question Groups section, click Triggerable.  
The Trigger Configuration pane is displayed.
2. Select Required or Pre-Populate.
3. Select the Post Condition: Display Details and set the Score Value.
4. In the Answer Assessment Triggers, expand any of the following triggers.
  - Care Plan Elements: Problems
  - Care Plan Elements: Actions
  - Task
  - Assessment Tasks
  - Programs
5. Click Get Started.
6. Select the appropriate Triggers.



### Note

The Assessments Triggers category allows the following maximum limits:

- 5 Problems
- 5 Programs
- 10 Tasks
- 15 Actions

7. Click Add Problems, Add Actions, Add Tasks, or Add Programs accordingly.



### Note

**To delete a trigger:**

1. In the Actions column, click > Delete.  
A Confirmation message is displayed.
2. Click Yes.

The selected triggers are displayed in the appropriate Assessments Triggers categories.

8. Click Submit.

## Versioning artifacts

As a TruCare administrator, you can update artifacts when the content needs to change. When you use *versioning* to update an artifact in TruCare Admin, the TruCare user sees the latest changes without having to take any action.

For example, when a user starts a new instance, TruCare displays the latest published version.

## Artifacts you can version

You can use Versioning to create versions of any of the following:

- Assessments
- Question Groups
- Questions
- Notes
- Care Plans
- Problems
- Objectives
- Actions

For assessments and care plans, you can create versions of any element in the hierarchy and update all elements that use the child elements. (Notes do not have a hierarchy.) When you update the care plan or assessment, you can pull in changes from all the children, which pulls in version changes to each level in the artifact hierarchy with a single click.

For example, suppose you versioned a question that is used in many assessments. You can create a new version of that question and then update any assessments that contain that question. This is true at all levels of the artifact hierarchy.

You can version out-of-the-box assessment artifacts, but you cannot version out-of-the-box care plan elements and notes. Care plan elements and notes must be custom in order for them to be versioned.

## Advantages of versioning

The alternative to versioning is to copy and rename an artifact and make changes to the copy before publishing it. In addition, if you update a child artifact, such as a question, that is used in more than one parent artifact, you must keep track of the parent artifacts that need to be updated and update them, which quickly becomes complex. This approach also requires that you number or name each version and let the users know which version to use.

After you version and update an artifact in TruCare Admin, the user must refresh their browser or log out and log back in to TruCare before the published changes are visible. So users can continue working with the same artifacts they have always worked with and receive the latest changes when they start a new instance of an artifact.

## Keeping track of artifact history

TruCare Admin keeps a history of each element of the artifact, including when it was updated last, who updated it, and the changes that were made if documented in a comment.

TruCare Admin also shows any linked artifacts, including parent and child artifacts.

When you unpublish the first version of an artifact in the Golden Configuration, all instance data of that artifact in TruCare is deleted. When you unpublish a later version of that artifact (for example, version 3), the artifact reverts to the previous version (for example, version 2). Use the history to help you to know the version the artifact will revert to.

## Approach to updating an artifact using versioning

When versioning a hierarchical artifact (care plan or assessment), use this general approach.

1. Determine the needed changes. Planning out your changes is helpful. However, the advantage of versioning is that you do not need to know every place in the hierarchy where your revised element is used. TruCare versioning does the work for you by flagging elements that need to pull in updates.
2. Start at the lowest level of the artifact hierarchy where changes are needed. For example, for assessments, start at assessment questions.

3. For each artifact that you want to update:
  - a. Search for and select the element.
  - b. "Version" the artifact by selecting the Version button. The version increases by 1.
  - c. Optionally pull in changes from child elements. Elements with changes are marked with a red flag. However, you can instead pull in changes at the top level, as described in step 4.
  - d. Make any other changes and submit.  
You can publish the changes if you want, but you can alternatively publish at the highest level (for example, at the assessment level), which publishes all children and their changes.
4. Pull in the changes to the top-level (assessment or care plan).
  - a. Search for assessments or care plans that need to be updated by selecting the **Only show entries with updates available** check box.
  - b. One at a time, edit each artifact that needs updating. Select the **Version** button to create a new version.
  - c. The number of available updates appears next to the **Available Updates** label. Select **Update** to pull in changes from all descendants. Pulling in updates versions and updates each child element, pulling in changes from its children.

## Working with and discarding draft versions

For every type of artifact that you can version—assessments, care plans, and notes—you can also create draft versions with any of its elements. A draft version is one for which you have:

- Versioned the element
- Submitted a draft of that versioned element

You can see whether an element has a draft version by searching for the element with the **Only show published entries** check box cleared. When an artifact has a draft version, you can see the draft as a child of the published element, shown circled in the figure.

If you do not want to keep the draft, you can discard it by performing the following steps with two different options:

1. Select the draft from the tree.
2. In the element editor, Select **Discard**.
3. Respond **Yes** to the prompt.

Alternatively, you can:

1. Select the published element that has the draft you want to discard. In this case, you can leave the **Only show published entries** check box selected.
2. In the element editor, select **Version**.  
Selecting Version opens the draft where you can continue working on it or discard it.
3. Select **Discard**.
4. Respond **Yes** to the prompt.

## Question Groups

To view a Question Group

1. Navigate to Care Management → Assessments → Question Groups.  
The Question Group summary page is displayed.
2. The Question Group summary page displayed the following options:
  - Updates
  - Question Group Name
  - Question Group ID

- Status
- Version
- Custom
- Action



### Note

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## Create a Question Group

To Create a Question Group

1. Navigate to Care Management > Assessments > Question Groups.  
The Question Group summary page is displayed.
2. Click Create Question Group.
3. Enter the required information in the following fields:
  - Question Group
  - ID
  - Version Comment
  - Target Publish Date
  - Ready To Export




### Note

To set a Question Group in Draft, click Save Draft.

4. To create the question group, click Submit  
A confirmation message is displayed.
5. Click Yes.  
A Question Group created successfully message is displayed.
6. Return to step 4 in Create a Question Group.

## View a Question Group

To view a Question Group

1. Navigate to Care Management → Assessments → Question Groups.
2. In the Actions column, click  > View.  
The View Questions Group page is displayed.
3. The following columns are displayed on the Question Group page:
  - Question Group Name
  - Question Group ID
  - Status
  - Version
  - Updates



### Note

An Update Available label is displayed in the Question Group category.


- Action

You may perform any of the following actions:

- Create a version
- Copy the Question Group
- Edit the Question Group


## Copy a Question Group

To copy a Question Group

1. Navigate to Care Management → Assessments → Question Groups.
2. In the Actions column, click  > Copy.  
The Copy Questions Group page is displayed.
3. Update the required information.
4. To create a draft of the Question Group, click Save.
5. To publish the Question Group, click Submit.  
A confirmation message is displayed.


## Edit a Question Group

To Edit a Question Group

1. Navigate to Care Management > Assessments > Question Groups.  
The Question Group summary page is displayed.
2. In the Actions column, click  > Edit.  
The Edit Question Group page is displayed.
3. Update the required information in the following fields:
  - Question Group
  - ID
  - Version Comment
  - Target Publish Date
  - Ready To Export
4. Click Submit.  
A Question Group updated successfully message is displayed.


## Delete or Discard Question Group

To Delete or Discard a Question Group

1. Navigate to Care Management > Question Groups.  
The Question Groups summary page is displayed.
2. Select a Question Group in Draft status.
3. In the Actions column, click  > View.
4. Click Discard Draft.  
A Discard Question Group Draft message is displayed.
5. Click Yes.  
The question group is deleted or discarded from the Assessments Summary page.

## Unpublish or Deactivate Questions Groups

To Unpublish or Deactivate Questions Groups

1. Navigate to Care Management → Assessments → Question Groups.  
The Questions Groups summary page is displayed.
2. In the Actions column, click  > Edit.  
The Edit Question Groups page is displayed.

3. Click Unpublish or Deactivate.

An Unpublish or Deactivate confirmation message is displayed.

4. Click Yes.

A question group has been unpublished or Deactivated successfully message is displayed.

The status changes to Draft or Disabled for the appropriate question.

## Available Update – Question Group



### Note

The system displays available updates only when you perform one of the following actions:

- Unpublish
- Create Version
- Copy

To update a Question Group:

1. Navigate to Care Management > Assessments > Question Group.  
The Question Group summary page is displayed.
2. In the Actions column, click Edit.  
The Edit Question Group page is displayed.
3. Click Unpublish.  
A confirmation message is displayed.
4. Click Yes.  
The Question Group summary page is displayed.
5. In the Actions column, click Edit.  
The Edit Question Group page is displayed.
6. Hover over the appropriate question group and perform one of the following actions:
  - a. Delete - To remove a component from the group.
  - b. Insert - To add a component to the group.
  - c. Copy - To duplicate a component within the group.
7. Click Submit.

## Accept the Available Updates – Question Group

To accept the available updates in an Assessment



### Note

The Updates Available flag is no longer displayed after you accept the available updates.

1. Navigate to Care Management > Assessments > Question Group.  
The Question Group summary page is displayed.
2. Identify the Question Group with the Updates Available flag.
3. In the Actions column, click Edit.  
The Edit Question Group page is displayed.
4. Click Available Updates.  
The Updates pane is displayed.
5. Review the available updates and click Update.  
The confirmation message with changes to the child artifacts is displayed.
6. Click Yes.

The Edit Question Group page is displayed.

7. Click Submit.

The confirmation message is displayed.

8. Click Yes.

## View Version History, Parent Link, Child Link for a Question Group

**Prerequisites:** View a Question Group

Click one of the following options:

1. **Version History -**

1. The Version History pane is displayed.
2. Review the required information.
3. To return to the Question Group page, click Cancel

2. **Parent Link -**

1. The Parent Link Versions pane is displayed.
2. Review the required information.
3. To return to the Question Group page, click Cancel

3. **Child Link -**

1. The Child Link Versions pane is displayed.
2. Review the required information.
3. To return to the Question Group page, click Cancel

## Question Group in Draft or Publish status

**Prerequisites:** Ensure to complete till step 3 in Create a Question Group.

To set the question group status to Draft or Publish status.

### Draft Status

1. Click Save draft.

A Question group is saved successfully message is displayed.

2. Click Yes.

### Publish Status

1. Click Submit.



#### Note

To deactivate a Questions Group, click Deactivate.

A confirmation message is displayed.

2. Click Yes.

The Question Group is unpublished message is displayed.

## Create a Question Group Version

**Prerequisites:** View a Question Group.



#### Note

You can create a version of a component only when the component is in published status.

To create a question Group version

1. Click Create Version.
2. Update the required information.
3. Click Submit.

A Question Group Version Created Successfully message is displayed.

## View Answers


To view Answers

- a. Navigate to Care Management > Assessment > Assessments.
- b. In the Assessment Library Detail, navigate to Question Groups.
- c. Expand the appropriate Question Group.

The Answers are displayed.

## Add Question Group

To Add Question Group to an Assessment

1. Navigate to Care Management > Assessments > Assessments.
2. Select an Assessment.
3. In the Actions column, click  > Edit.

The Edit Library Details page is displayed.

4. In the Question Groups section, click Add Question Groups.

The Add Question Group pane is displayed.

5. Select the appropriate question and click Submit.

The page returns to the Create Library Details page.




### Note

To generate a draft assessment, click Save.

6. Click Submit

## View Question Group by Notes ID

To view Question Group by Notes ID

1. Navigate to Care Management > Assessments > Assessments.
2. In the Actions column, click  > View.
3. In the appropriate Question Group, click Notes.


The Notes pane is displayed.

4. You may view the Notes Name and Notes ID in the Notes pane.

5. To close the Question Group Scoring pane, click Cancel.

## View Question Group by Score

To view Question Group Score

1. Navigate to Care Management > Assessments > Assessments.
2. In the Actions column, click  > View.
3. In the appropriate Question Group, click Question Group Scoring.

The Question Group Scoring pane is displayed.

4. You may view the Max Answer Value and Score in the Question Group Scoring pane.

5. To close the Question Group Scoring pane, click Close.

## Add Question Group Scoring

**Prerequisites:** Add Question Group to Assessment.

## To add Question Group Scoring

1. In the Assessment Library Detail, navigate to Question Groups.
2. In the appropriate Question Group, click Question Group Scoring.  
The Question Group Scoring pane is displayed.
3. Enter the required information in the Max Answer Value and Score field.
4. Click + to add an additional score line item.
5. After adding the score line items, click Save.

# Questions

## Create a Question

### To Create Question

1. Navigate to Care Management > Assessments > Questions.  
The Question summary page is displayed.
2. Click Create Question.  
The Create Question pane is displayed.
3. Enter the required information in the following fields:
  - Question Name
  - ID
  - Version Comment
  - Target Publish Date
  - Tool Tip
  - Will this question required
  - Ready To Export
  - GUI Type
4. You may click here to set a Question in Draft or Publish status.
5. To create the question, click Submit.  
A confirmation message is displayed.
6. Click Yes.  
A Question Created Successfully message is displayed.
7. Return to step 4 in Create a Question.

## View a Question

### To view a question

1. Navigate to Care Management → Assessments → Questions.
2. In the Actions column, click ⋮ > View.  
The View Questions page is displayed.
3. The following fields are displayed in the view question page:
  - Question Name
  - ID
  - Version Comment
  - Target Publish Date
  - Tool Tip
  - Created Date
  - Mandatory Question
  - Ready To Export

- Available Updates
  - GUI Type
4. You may click Edit to update the information or Cancel to return to the questions summary page.




### Note

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## Copy a Question

To Copy Question

1. Navigate to Care Management > Assessments > Questions.  
The Questions summary page is displayed.
2. In the Actions column, click  > Edit.  
The Copy Questions page is displayed.
3. Click Submit.  
A Question Created Successfully message is displayed.

A Copy of the appropriate question is created.


## Edit a Question

To Edit Questions



### Note

You may only edit a question in draft status.

1. Navigate to Care Management > Assessments > Question.  
The Question summary page is displayed.
2. In the Actions column, click  > Edit.  
The Edit Questions page is displayed.
3. Update the required information and click Submit.




### Note

If you change the GUI type, it will remove the conditional logic applied in the previous GUI setting.

4. Click Submit.  
A confirmation message is displayed.
5. Click Yes.  
A Question Updated Successfully message is displayed.

## Delete or Discard Question

To Delete or Discard a Question

1. Navigate to Care Management > Question.  
The Questions summary page is displayed.
2. Select a Question in Draft status.
3. In the Actions column, click  > View.
4. Click Discard Draft.

A Discard Question Draft message is displayed.

5. Click Yes.

The question is deleted or discarded from the Assessments Summary page.

## Unpublish or Deactivate a Question

To Unpublish Questions

1. Navigate to Care Management → Assessments → Questions.

The Questions summary page is displayed.

2. In the Actions column, click  > Edit.

The Edit Questions page is displayed.

3. Click Unpublish or Deactivate.

An Unpublish or Deactivate confirmation message is displayed.

4. Click Yes.

A modified confirmation message is displayed.

The status changes to Draft or Disabled for the appropriate question.

## Available Updates - Question



### Tip

Available Update for a Question is only available for the following GUI Types:

- Horizontal radio buttons
- Vertical radio buttons
- Drop-down list
- Three column radio buttons
- Vertical check boxes
- Three column check boxes



### Note

The system displays available updates only when you perform one of the following actions:

- Unpublish
- Create Version
- Copy

To update a Question:

1. Navigate to Care Management > Assessments > Question.

The Question summary page is displayed.

2. In the Actions column, click Edit.

The Edit Question page is displayed.

3. Click Unpublish.

A confirmation message is displayed.

4. Click Yes.

The Question summary page is displayed.

5. In the Actions column, click Edit.

The Edit Question page is displayed.

6. Hover over the appropriate question and perform one of the following actions:

- a. Delete - To remove a component from the GUI Type.
  - b. Insert - To add a component to the GUI Type.
  - c. Copy - To duplicate a component within the GUI Type.
7. Click Submit.

## Accept the Available Updates – Question

To accept the available updates in an Assessment



### Note

The Updates Available flag is no longer displayed after you accept the available updates.

1. Navigate to Care Management > Assessments > Question.  
The Question Group summary page is displayed.
2. Identify the Question with the Updates Available flag.
3. In the Actions column, click Edit.  
The Edit Question page is displayed.
4. Click Available Updates.  
The Updates pane is displayed.
5. Review the available updates and click Update.  
The confirmation message with changes to the child artifacts is displayed.
6. Click Yes.  
The Edit Question page is displayed.
7. Click Submit.  
The confirmation message is displayed.
8. Click Yes.

## View Version History, Parent Link, Child Link for a Question

**Prerequisites:** View a Question

Click one of the following options:

1. **Version History** -
  1. The Version History pane is displayed.
  2. Review the required information.
  3. To return to the Question page, click Cancel
2. **Parent Link** -
  1. The Parent Link Versions pane is displayed.
  2. Review the required information.
  3. To return to the Question page, click Cancel
3. **Child Link** -
  1. The Child Link Versions pane is displayed.
  2. Review the required information.
  3. To return to the Question page, click Cancel

## Question in Draft or Publish status

**Prerequisites:** Ensure to complete till step 3 in Create a Question

To set the question status to Draft or Publish status.

### Draft

1. Click Save draft  
A Question is saved successfully message is displayed.
2. Click Yes.

### **Publish**

1. Click Submit.  
A confirmation message is displayed.
2. Click Yes.

To create a question group, click [here](#).

## **Add a Question**

To add a question

1. Navigate to Care Management > Assessments > Questions.  
The Question Group summary page is displayed.
2. Click Add Question.  
The Add Question pane is displayed.
3. Select the appropriate questions.
4. Click Submit.  
The Question summary page is displayed.
5. Return to step 4 in Create a Question Group.

## **Create a Conditional Question**

**Prerequisites:** To create a conditional question, you may perform any one of the following actions

- Create a Question.
- Create a Question Version.
- Copy a Question.

To create a Conditional Question

1. In the GUI section, select the appropriate GUI Type.



### **Warning**

When you change the GUI type of a question, it removes all existing conditional logic applied to the question.

2. Select the appropriate Drop-down details.
3. In the appropriate Option Group, click Add Question.



### **Warning**

When you change the Option Group of a GUI type, it removes all existing conditional logic applied to the GUI type.



### Note

Conditional Questions are not allowed for the following GUI types:

- Text field, Label
- Vertical Checkbox Date
- , Data Field
- Phone Number
- Diagnosis Field
- Text Area

The Add Conditional Question pane is displayed.

4. Select the appropriate conditional questions and click Submit.

The Questions page is displayed.

5. Click Submit.

A confirmation message is displayed.

6. Click Yes.

A Question Created Successfully message is displayed.

## Edit or Update a Conditional Question

**Prerequisites:** To edit or update a conditional question, you may perform any one of the following actions

- Create a Question.
- Create a Question Version.
- Copy a Question.

To edit a Conditional Question

1. In the GUI section, select the appropriate GUI Type.
2. In the appropriate sub-category, Inset, Delete, or Add Conditional Question.



### Note

An Update Available label is displayed in the updated sub-category.

To view the list of updated sub-categories

- a. Scroll to the top of the Questions page.  
A New versions available bar is displayed.
- b. Click Available Update.  
The Updates pane is displayed.
- c. To view the updates, expand the appropriate sub-categories.
- d. Click Update to accept the updated questions versions.



### Note

Click Cancel to return to the Questions page, where you may continue to edit the question.

3. Click Submit.



### Note

To save the question, click Save Draft.

A confirmation message is displayed.

4. Click Yes.

A Question Created Successfully message is displayed.

## Create a Question Version

**Prerequisites:** Ensure that you have access to the View a Question feature before proceeding. To version an artifact, the environment must be configured as a GC environment.



### Note

You can create a version of a component only when the component is in published status.

To create a question version

1. Click Create Version.
2. Update the required information.
3. Click Submit.

A Question Version Created Successfully message is displayed.

## Note Definitions

### Create Note Definitions

To create a Note Definition


1. Navigate to Core Configuration > Notes
2. Click Create Note.  
The create note page is displayed.
3. Enter the required information and click Submit.

### View or Edit Note Definitions



**Prerequisites:**

- Create an Assessment
- Edit an Assessment
- Copy an Assessment

To view or edit Note Definitions

1. To view the Note Definitions, scroll to the Type section.
2. To edit Note Definitions, in the Actions column, click  > Edit.
3. In the Type section, click Add Definitions.

The Add Note Definitions pane is displayed.

4. Select the required Note Definitions and click Submit.
5. To view the Note Definition details:
  - a. In the Actions column, click  > View.  
The View Notes pane is displayed.
  - b. Click Close to return to the Assessments page.
6. To delete the Note Definition details:
  - a. In the Actions column, click  > Delete.  
A confirmation message is displayed
  - b. Click Yes.

## Add Note Definitions

### Prerequisites:

- Create an Assessment
- Copy an Assessment

To add note definitions

1. Scroll to the Type section and click Add Note Definition.

The Add Note Definition pane is displayed.

2. Select the appropriate Note Definition.

3. Click Save.

4. To view the Note Definition details:

- a. In the Actions column, click  > View.

The View Notes pane is displayed.

- b. Click Close to return to the Assessments page.

5. To delete the Note Definition details:

- a. In the Actions column, click  > Delete.

A confirmation message is displayed

- b. Click Yes.

## Programs

The Programs screen is used to create and manage care programs such as disease management, wellness initiatives, and complex care coordination. Users can do the following actions in the Programs section:

- Define program goals, workflows, and eligibility criteria.
- Assign members to appropriate interventions.
- Customize program parameters to support value-based care.

## Program Summary

The Programs Summary screen provides a high-level overview of all active and completed programs. This will include the following:

- Enrollment numbers and member progress
- Program status and performance metrics
- Outcome tracking to evaluate effectiveness across populations

## Create a Program

To create a program

1. Navigate to Care Management > Program.

2. Click **Create Program**.

The Create Program Page is displayed.

3. The Create Program page displayed the following options:

- **Name** — The program name must be unique.
- **Description** — The program name must be unique.
- **Program Family** — A program family is a group of programs that can be used to limit a member to being enrolled into only one program from a program family at a time. This can be configured at the BHP node level in **Customer Setup**.
- **Associated Features** — The program name must be unique.

- **TruCare Program?** — The default is **No** for custom programs and **Yes** for others.
  - **Ready To Export** — If the program is ready to be exported from TruCare Admin and then imported to TruCare, select the **Ready To Export** check box. A check mark appears in the **RTE** column in the programs summary grid for programs that have the **Ready To Export** check box selected. See the [TruCare Import Export Admin Guide](#) for more information about export/import processes.
  - **Service Level** — Multiple service levels can be added to a program. This value describes the level of service being delivered to the members associated with the enrolled program. These include from highest (most intensive) to lowest (least intensive). The service level is an option value set that can be defined in the **Technical Configuration** section. Out-of-the-box values include **Coaching**, **Education**, and **Self-Directed**.
4. From the Service Levels drop-down, select the appropriate service level
  5. Click Add Service Level.
    - a. Click Related Specialization  
The Related Specialization pane is displayed.
    - b. Select the required Related Specialization and click Add Selected.
    - a. Click Add Task Packages.  
The Select Task Packages to be Added pane is displayed.
    - b. Select the required Task Packages and click Add Selected.
  6. Click **Submit**.  
On successful save, the Program Summary page is displayed.

## View Program Summary

To view a program summary

1. Navigate to Care Management > Program.  
The Program Summary page is displayed.
2. The Program Summary page displays the following options:
  - Program Name
  - Description
  - License Features
  - Source
  - Status
  - Ready to Export
  - Actions



### Note

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## View Program Details

To view program details

1. Navigate to Care Management > Program.  
The Program Summary page is displayed.
2. In the Actions column, click View.  
The View page is displayed.
3. The View Program page displays the following options:

- Program Name
- Description
- Program Family
- License Feature
- TruCare Program
- Ready to Export



### Note


To modify the Program details, Add Service Level, or Disable Program, you may click Edit.

## Edit a Program

When you edit a program and remove the service level or disable it from the Drop-Down Values screen, the system warns that members enrolled at the selected service level cannot continue working with the related task packages. If you choose Yes in response to the warning, the system removes the service level and its related task packages from the program and associated BHP nodes.

Additionally, when you edit (but do not add) a program and remove a task package from a program-service level combination, the system warns you if the service level has been selected for at least one BHP node. In this case, members enrolled in the program will lose access to the selected task package.

To edit a program summary

1. Navigate to Care Management → Program.  
The Program Summary page is displayed.
2. In the Actions column, click  > Edit.  
The Edit Program page is displayed.
3. Edit any of the following options:
  - Program Name
  - Description
  - Program Family
  - License Feature
  - TruCare Program
  - Ready to Export
  - Status
4. From the Service Levels drop-down, select the appropriate service level
5. Click Add Service Level.
  - a. Click Related Specialization  
The Related Specialization pane is displayed.
  - b. Select the required Related Specialization and click Add Selected.
  - a. Click Add Task Packages.  
The Select Task Packages to be Added pane is displayed.
  - b. Select the required Task Packages and click Add Selected.
6. Click **Submit**.



### Note

You may also Add Service Level or Disable Program on this page.

## Edit Ready to Export

**Prerequisite:** Ensure that you Create a Program or Edit a Program.


To edit Ready to Export

1. In the Ready To Export option, select the appropriate option.  
A confirmation message is displayed.
2. Click Yes.
3. Click Submit.

The Task Package is successfully added.


## Edit a Service Level

To edit a Service Level

1. Navigate to Care Management > Program  
The Program Summary page is displayed.
2. In the Service Level section, click  > Add Service Level.
3. Select the appropriate Service Level and click Submit.

## Delete a Service Level

To delete a Service Level

1. Navigate to Care Management > Program.  
The Program Summary page is displayed.
2. In the Actions column, click  > Edit.
3. In the Service Level section, Select the appropriate Service level and click DELETE ICON.  
The Delete Service Level confirmation message is displayed.
4. Click Yes.
5. Click Submit.

## Edit a Related Specialization

To edit a Related Specialization

1. Navigate to Care Management > Program.  
The Program Summary page is displayed.
2. Select the appropriate Service Level.
3. Click Related Specialization.  
The Related Specialization pane is displayed.
4. Select or deselect the appropriate Related Specialization.
5. Click Add Selected.
6. Click Submit.

## Disable a program

**Prerequisites:** Follow the steps in Edit Program Summary.

To disable a program

1. Click Disable Program.  
A Disable Program confirmation message is displayed.
2. Click Yes.  
The toggle switch position changes to Enable Program.
3. Click **Submit**.

# Care Plans

You can use out-of-the-box care plans, create them from scratch, or combine custom and supplied components to build a care plan. Care plans guide care management activities by focusing on member problems, objectives, and actions, such as assessments and interventions, to resolve identified issues.

After you publish a care plan definition or care plan elements, you can create and update new versions of each element. In TruCare, users working with an in-progress care plan continue using the version they started, while new instances adopt the latest version. When you create a new version of an element, such as an action definition at a lower level of a care plan, you must also version and update parent elements at each level up the tree.

Although you can do this manually, the best practice is to update the care plan definition at the top level, which automatically incorporates changes from lower levels and increments each version. While working on a parent element, you can identify updates to child elements by checking for a flag on the tab.

For example, if you update a problem, a flag appears on the Problems tab. You can also review updated elements on the corresponding summary screen. For more details, see [Create a Version of an Care Plan \[124\]](#).

Care plans are hierarchical:

- A care plan contains one or more problems.
- Each problem contains one or more objectives, in the form of goals or outcomes.
- Each goal or outcome contains one or more actions in one of these forms:
  - Assessment task
  - An intervention
  - A service request
  - A task

You can use one of the supplied text options or you can add your own by editing the [Drop-down values \[176\]](#) list.

## About Care plan

### Example: Create a care plan

This example shows how to create all aspects of a care plan, search in the libraries, edit a problem, and build a care plan hierarchy.

Suppose you want to create your own care plan that is made up of your own problems, objectives, and actions. You can create these components in any order you want. For example, you can create all of your problems at one time, all of your actions at one time, and all of your objectives at one time. It's important that you leave them in draft mode so you can continue to edit them. You can also create them in order from the bottom up—starting with actions and moving up the hierarchy, adding the lowest components first and building the hierarchy as you create the rest of the tree. Regardless of how you create them, you need to create a hierarchy.

To create the hierarchy, add actions to goals, goals to objectives, objectives to problems, and problems to care plans. You can perform these activities in any order you want. Here is one example for how to create the care plan:

1. Create two actions: Action-1 and Action-2.
2. Create an objective: Objective-1. Add Action-1 and Action-2 to it.
3. Create a problem: Problem-1. Add Objective-1 to it.
4. Create the care plan My Care Plan. Add Problem-1 to it.

The care plan has the structure shown in the figure:

▼ PROBLEM: Problem 1	PROBLEM-1
▼ GOAL: Objective 1	OBJECTIVE-1
ASSESSMENT TASK: Adult Health Risk Assessment (HRA)	ACTION-1
ASSESSMENT TASK: Alcohol/Chemical Dependency	ACTION-2

## Create actions

Create two actions.

1. Select Care Management → Care Plans.
2. Click the Actions Library tab.
3. Click **Create New Action**.
4. In the Action Editor screen, from the **Action Type** drop-down list, select **Assessment Task**.
5. Enter **ACTION-1** as the action ID.
6. From the **Assessment Task** list, select an assessment. You can select any assessment for this example. The assessment name becomes the name of your action.
7. Click **Submit**.

Create the second of the two actions. Repeat this procedure, this time setting ID to **ACTION-2** and selecting a different assessment task. Alternatively, select a different value for **Action Type** and follow the prompts.

## Search for actions in the library

Search the actions library to see the actions that you created.

1. On the Actions Library tab, enter **ACTION** in the ID box.
2. Clear the **Only show published actions** check box.
3. Click **Search**.
4. The name of the action associated with the ID appears in the Action Name column.

## Create objective

You can add children as you create an objective. Or, you can create an objective and then later edit it to add children.

Create the objective. Then add ACTION-1 as its child.

1. Click Care Management → Care Plans.
2. Click the Objectives Library tab.
3. Click **Create New Objective**.
4. Enter an objective name. For this example, enter **Objective 1**.
5. Enter an ID of **OBJECTIVE-1**.
6. Leave the objective type set to **Goal**.
7. Add an action to the objective. Click the Actions tab.
8. Click **Add actions**.
9. Search for the action that you want to add to the objective. Enter **ACTION** in the ID box, clear the **Only show published entries** check box, then click **Search**.
10. Click **Select** next to ACTION-1. The action appears in the Select Items list at the bottom of the screen.
11. Click **Add Selected**.
12. Click **Submit**.

## Edit an objective to add a child

You can edit an objective to add a child.

The new objective has one child, ACTION-1, but you want to add another child. You can edit the objective to add a child.

1. Click Care Management → Care Plans.
2. Click the Objectives Library tab.
3. Search for the objective you want to edit. Enter an objective ID of **OBJECTIVE**, clear the **Only show published entries** check box, then click **Search**.
4. In the Objective Name column, click **Objective 1**. The objective opens in draft mode. You can edit objectives that are in draft mode.
5. Click the **Actions** tab.
6. Click **Add Actions**.
7. Clear the **Only show published entries** check box. Then search for an action ID that starts with ACTION.
8. Click **Select** next to ACTION-2. The action appears in the **Selected Items** table.
9. Click **Add Selected**.
10. Click **Submit**.

## Add a problem

Add a problem and add an objective to it as you create it.

Create a problem named Problem 1 and add Objective 1 as its child.

1. Click Care Management → Care Plans.
2. Click the Problems Library tab.
3. Click **Create New Problem**.
4. Enter **Problem 1** as the problem name and **PROBLEM-1** as the ID.
5. Click the Objectives tab.
6. Click **Add Objectives**.
7. Search for the objective that you want to add to the problem. Enter **OBJECTIVE** in the ID box, clear the **Only show published entries** check box, then click **Search**.
8. Click **Select** next to Objective 1. The objective appears in the Selected Items table at the bottom of the screen.
9. Click **Add Selected**.
10. Click **Submit**.

## Create the care plan

Create the care plan and add a problem to it.

This problem is Problem 1, which you just created, so it has a complete problem hierarchy: a problem and a child objective that has two children actions.

1. Click Care Management → Care Plans.
2. On the Care Plans Library screen, click **Create New Care Plan**.
3. Enter **My Care Plan** as the care plan name and **MYCAREPLAN** as the care plan ID.
4. Select any license feature, for example, CM.
5. Click the Problems tab.
6. Click **Add Problems**.
7. Search for the problem that you want to add to the care plan. Enter **PROBLEM** in the ID box, clear the **Only show published entries** check box, then click **Search**.
8. Click **Select** next to Problem 1. The problem appears in the Selected Items table at the bottom of the screen.

9. Click **Add Selected**.

**Note**

The problem appears in the Care Plan Element column. You can expand the hierarchy to see that the parts that you added are there in the expected structure.

10. Click **Submit**.

## Next steps

After you finish creating a care plan, you need to make the care plan available to the appropriate users in TruCare.

After you are satisfied with a care plan, you can publish it. See [Edit and publish a care plan definition](#). Publishing the care plan publishes all of its components and makes the care plan available in TruCare to users who have the appropriate permissions.

You must also give permission to the role to access this new resource. For more information, see [Edit role access for new TruCare program resources](#).

After you have published the care plan, you can mark it ready to export to the production environment. See [Mark a care plan ready to export](#).

## Care Plans Library


### Create a Care Plans Library

To create a care plan library

1. Navigate to Care Management > Assessments > Care Plans.
2. Click Create Plan.
3. Enter the required information and click Submit.  
A publish confirmation message is displayed.
4. Click Yes.

### View a Care Plans Library

To view a Care Plans Library


1. Navigate to Care Management > Care Plans > Care Plans Library.  
The Care Plans Library summary page is displayed.
2. In the Actions column, click  > View.  
The View Care Plan page is displayed.
3. You may click Edit to update the information or Cancel to return to the Care Plans Library summary page.

**Note**

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

### Copy a Care Plan Library

To copy a Care Plan Library

1. Navigate to Care Management > Care Plans > Care Plans Library.  
The Care Plans Library summary page is displayed.
2. In the Actions column, click  > Copy.  
The Copy Care Plan page is displayed.

3. Update the required information and click Submit or Cancel to return to the Care Plans Library summary page.



### Note

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## Create a Version of an Care Plan

To Preview Version Update

1. Navigate to Care Management > Care Plans > Care Plan.  
The Care Plan summary page is displayed.
2. In the Actions column for a Care Plan, click > View.  
The View Care Plan page is displayed.
3. Click Create Version.



### Important

A message There is a new version of Objective available. Changes can be viewed or accepted to create a version is displayed.

4. Update the required information and click Submit
5. To create a draft of the Care Plan, click Save.
6. To publish the Care Plan, click Submit.  
The Care Plan summary page is displayed.



### Note

The version number column is updated to the newer version.

## View Version History, Parent Link, Child Link for a Care Plan

**Prerequisites:** View a Care Plan


Click one of the following options:

1. **Version History -**
  1. The Version History pane is displayed.
  2. Review the required information.
  3. To return to the Care Plan page, click Cancel
2. **Parent Link -**
  1. The Parent Link Versions pane is displayed.
  2. Review the required information.
  3. To return to the Care Plan page, click Cancel
3. **Child Link -**
  1. The Child Link Versions pane is displayed.
  2. Review the required information.
  3. To return to the Care Plan page, click Cancel

## Preview Updates of a Care Plan




### Note

The system marks a Care Plan that includes updated plan or information in published or draft status with a .

The system displays an  label in the updated sub-category.

To preview a Care Plan

1. Navigate to Care Management > Care Plans > Care Plan.  
The Care Plan summary page is displayed.
2. Select a draft version of an Care Plan with multiple versions.
3. In the Actions column of the appropriate Care Plan, click  > Edit.



### Important

A message There is a new version of Objective available. Changes can be viewed or accepted to create a version is displayed.

4. In the appropriate sub-category, Inset, Delete, or Add Care Plan.

To view the list of updated sub-categories

- a. Scroll to the top of the Care Plan page.

A New versions available bar is displayed with the  button.

- b. Click .

The Updates pane is displayed.

- c. To view the updates, select the appropriate sub-categories.
- d. To accept the updated Care Plan versions, click Update.




### Note


Click Cancel to return to the Care Plan page, where you may continue to edit the care plan.

5. To create a draft of the Care Plan, click Save.
6. To publish the Care Plan, click Submit.  
A confirmation message is displayed.
7. Click Yes.  
The Care Plan summary page is displayed and the status is updated to Published.

## View a Care Plan Trigger Configuration Details

To view a Care Plan Trigger Configuration Details

1. Navigate to Care Management → Care Plan.
2. Click Actions Library tab.  
The Actions Library summary page is displayed.
3. In the Actions column, click  > View.  
The Actions Library page is displayed.
4. In the Questions Group, expand the appropriate question group.
5. Expand the appropriate question.
6. Hover over the appropriate trigger.  
The View Trigger Configuration button is displayed.

7. Click View Trigger Configuration.  
The View Trigger Configuration pane is displayed.
8. Click View Trigger Configuration.  
The View Trigger Configuration pane is displayed.
9. Select the appropriate trigger.
10. In the appropriate Answer Assessment Triggers tab, expand the appropriate trigger.
11. In the Actions column, click .
- The View Detail pane is displayed.
12. Verify the Care Plan Trigger Configuration Details.
13. Click Close to return to the View Trigger Configuration pane.

## Configuring Care Plan Date Tracking Review for Compliance

Care Managers must review Care Plans regularly to meet compliance guidelines. TruCare simplifies this by automatically tracking past reviews and upcoming due dates, eliminating manual tracking. The system calculates the next review date based on the last review and updates the Care Plan accordingly.

Users can find the **Last Reviewed Date** beneath the Care Plan's start date and access past reviews in the **Care Plan History** table, ensuring efficient and accurate compliance tracking.

The New Admin Portal provides an updated interface for configuring the **Next Review Date** settings. Administrators can set default review intervals, ensuring automated tracking of Care Plan reviews.

### Navigation Path:

*Line of Business > Customer Setup > CM > Care Plan Configuration > Care Plan Option > Next Review Date Configuration*

### Configuration Steps:

1. Access the Care Plan Configuration module via the designated path.
2. Modify the **Next Review Date** Configuration to set appropriate review frequency.
3. Ensure that the system aligns review tracking with compliance requirements.

## Configure Mark as Reviewed Comment Dropdown Selections

TruCare administrators can configure the dropdown selections available when a user selects **Mark as Reviewed** within the Care Plan interface. This customization helps maintain consistency in review tracking while allowing flexibility in selection options.

The New Admin Portal enables administrators to configure the dropdown selections displayed when users select **Mark as Reviewed** on the *Add*, *Edit*, or *Summary* Care Plan page.

### Navigation Path:

*Admin Portal > CM License Configuration > Care Plan Tab > Dropdown Selection Settings*

Follow these steps for proper setup:

1. Navigate to **CM License Configuration** under the Care Plan Tab.
2. Locate the **Mark as Reviewed Comment Configuration** field and define the appropriate dropdown options.
3. Adjust the settings to allow or restrict selections based on administrative needs.

### Configuration Steps:

A selection option is included with the CM License under the Care Plan tab:

1. **Question Text:** Mark as Reviewed Comment Configuration.
2. **Default Selections:**
  - *Reviewed with Member*
  - *Reviewed with Caregiver*
  - *Reviewed with Provider*
  - *Other*

Administrators have the ability to disable default selections as needed. At least one selection is mandatory to ensure proper functionality.

## Configure Next Review Date after Review is Complete

To support timely Care Plan reviews, administrators can configure the **Next Review Date** setting. This field automatically populates when a user marks a Care Plan as reviewed, providing a clear reminder of when the next review is due.

The New Admin Portal provides administrators with the ability to configure the **Next Review Date** field efficiently. Follow these steps for proper setup:

### Navigation Path:

*Line of Business > Customer Setup > CM > Care Plan Configuration > Care Plan Tab > Next Review Date Configuration*

### Configuration Steps:

1. Navigate to **Next Review Date Configuration** under the Care Plan Tab.
2. When **Mark as Reviewed** is selected configure the **Next Review Date** within the appropriate settings.
3. A selection option should be added to the CM license under the Care Plan tab:
  - **Question Text:** *Next Review Date Configuration (enter number) days.*
  - **Default Value:** *30 days.*

## Problems Library

In the problems library, you create problem definitions to use in one or more care plans. You can copy existing problems as a basis for your own definitions.

You can edit the problems you create while their status is Draft. You can also add objectives to problems.

## Create a Problems Library

To create a Problems Library

1. Navigate to Care Management > Care Plans > Problems Library.
2. Click Create New Problems.  
The Create page is displayed.
3. Enter the required information in the following fields:
  - Problem Name
  - Problem ID
  - Description
  - Problem Category
  - License Feature
  - Program
  - Target Publish Date
  - Ready To Export

- Version Comments
- 4. In the Add Notes section, click Select Notes.  
The Add Note to Problem pane is displayed.
- 5. Select the appropriate Notes and click Add Selected.
- 6. In the Add Objectives section, click Select Objectives.  
The Add Objectives to Problem pane is displayed.
- 7. Select the appropriate Objectives and click Add Selected.
- 8. Click Submit.  
A confirmation message is displayed.
- 9. Click Yes.

## View a Problems Library

To view the Problems Library

1. Navigate to Care Management > Care Plans > Problems Library  
The Problems Library summary page is displayed.
2. The Problems Library page displays the following options:
  - Problem Name
  - Problem ID
  - Problem Category
  - Status
  - Version
  - Custom
  - Target Publish Date
  - Action



### Note

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

3. In the Actions column, click ⋮ > View.
4. You may click Edit to update the information or Cancel to return to the questions summary page.

## View Problems Library History


To view the Problems Library History

1. Navigate to Care Management > Care Plans > Problems Library.
2. In the Actions column, click ⋮ > View.
3. Click View Version History.  
The Version pane is displayed.
4. Select the appropriate version and click the Problem Detail tab.
5. The following are the details available in the Problems History Version pane
  - Notes
  - Objectives

## Edit a Problem Library

To edit a Problem Library

1. Navigate to Care Management > Care Plans > Problems Library.  
The Problems Library summary page is displayed.

2. In the Actions column, click  > Edit.  
The Problems Library details edit Page is displayed.
3. Update the required information and click Submit.



### Note

From the Edit Problems Library screen, you may also choose to Disable or Unpublish an Actions Library line item.

#### Disable


1. Click Disable or Enable.  
A Confirmation message is displayed.
2. Click Yes.  
The status of the Problems Library is updated accordingly.

#### Unpublish

1. Click Unpublish or Publish  
A Confirmation message is displayed.
2. Click Yes.  
The status of the Problems Library is updated accordingly.

## Copy a Problem Library

To copy a Problem Library


1. Navigate to Care Management > Care Plans > Problems Library
2. In the Actions column, click  > Copy.
3. Update the required fields and click Submit.

## Preview Updates of a Problem Library

Before you update a published problem definition, create a new version of it. Then update the new version by making changes such as adding or removing objectives and, optionally, pulling in changes from its children. If the problem is used in care plan definitions, version and update those care plans as well. For details, see Version and update a published care plan definition.

When you publish an updated problem definition, the system simultaneously publishes any children in draft state. If the children of a problem definition have been updated, you can pull in those updates. However, best practice is to pull in the changes through the care plans, which automatically versions and pulls in updates across all levels of the care plan hierarchies.

To preview updates of a Problem Library

1. Navigate to Care Management > Care Plans > Problem Library.  
The Problem Library summary page is displayed.
2. Select a draft version of an Problem Library with multiple versions.
3. In the Actions column of the appropriate Problem Library, click  > Edit.



### Important

There is a new version of Problem Library is available. Changes can be viewed or accepted to create a version is displayed.

4. Click Preview Version.  
The Preview Version Update pane is displayed.
5. You may click Cancel to return to the Edit Problem Library page.

6. To apply the changes to child artifacts, click Update.

A confirmation message is displayed.

7. Click Yes.



### Important

There is a new version of Problem Library is available. Changes can be viewed or accepted to create a version is removed and the draft status is displayed.

8. To create a draft of the Problem Library, click Save.

9. To publish the Problem Library, click Submit.

A confirmation message is displayed.

10. Click Yes.

The Problem Library summary page is displayed and the status is updated to Published.

## Objectives Library

Use the objectives library to create an objective definition for one or more problems or care plans. You can reuse an objective definition in multiple problems and care plans. The library includes many existing objectives that you can search for and copy to use in your own plans.

You can use these TruCare objective definitions directly in a care plan or as the basis for a new objective. While the objective is in a draft state, you can also add actions to it.

To view Objective Library

1. Navigate to Care Management > Care Plans > Objective Library.

The Objective Library Summary page is displayed.

2. The Objective Library page displays the following options:

- Updates
- Objective Name
- Objective ID
- Objective Category
- Objective Type
- Status
- Version
- Custom
- Target Publish Date
- Action



### Note

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## Create an Objective

**Prerequisites:** Navigate to Objectives Library

To create an Objective

1. Click Create New Objective.

The Create Objective page is displayed.

2. Update the required information and click Submit.



### Note

- To set the Objective in Draft status, click Save.
- To set the Objective in Publish status, click Submit.

A Publish confirmation message is displayed.

3. Click Yes.

## Copy an Objective

**Prerequisites:** Navigate to Objectives Library

To copy an Objective

1. In the Actions column, Click > Copy.
2. Update the required fields and click Submit.  
A Publish confirmation message is displayed.
3. Click Yes.

## View an Objective

**Prerequisites:** Navigate to Objectives Library

To copy an Objective

- In the Actions column, Click > View.  
The Objective Library details page is displayed.  
To view the Objective Version History
  - a. Click View Version History.  
The versions pane is displayed.
  - b. To view the Objective version, click the Objective Details tab.
- To view the Parent Links
  - a. Click View Parent Links.  
The versions pane is displayed.
  - b. To view the Parent Links, click the Parent Links tab.
- To view the Child Links
  - a. Click View Child Links.  
The versions pane is displayed.
  - b. To view the Child Links, click the Child Links tab.

## Create an Objective Library version


To Create Objective Library Version

1. Navigate to Care Management > Care Plans > Objective Library.
  2. In the Actions column, click > View.
  3. Click Create Version.
  4. Update the required information and click Submit.  
A confirmation message is displayed.
  5. Click Yes.
  6. To view the Objectives Library Version History:
    - a. Click View Version History.  
The versions pane is displayed.
    - b. To view the Objectives Library version, click the Version History tab.
- To view the Parent Links

- a. Click View Parent Links.  
The versions pane is displayed.
- b. To view the Parent Links, click the Parent Links tab.  
To view the Child Links
  - a. Click View Child Links.  
The versions pane is displayed.
  - b. To view the Child Links, click the Child Links tab.

## Edit an Objective Library

To Edit an Objective Library

1. Navigate to Care Management > Care Plans > Objective Library.  
The Objective Library summary page is displayed.
2. In the Actions column, click  > Edit.  
The Objective Library details edit Page is displayed.
3. Update the required information and click Submit.



### Note

From the Edit Objective Library screen, you may also choose to Disable or Unpublish an Actions Library line item.

#### Disable


1. Click Disable or Enable.  
A Confirmation message is displayed.
2. Click Yes.  
The status of the Objective Library is updated accordingly.

#### Unpublish

1. Click Unpublish or Publish  
A Confirmation message is displayed.
2. Click Yes.  
The status of the Objective Library is updated accordingly.

## Create a Version of an Objectives Library

To Preview Version Update

1. Navigate to Care Management > Care Plans > Objectives Library.  
The Objectives Library summary page is displayed.
2. In the Actions column for a Objectives Library, click  > View.  
The View Objectives Library page is displayed.
3. Click Create Version.



### Important


A message There is a new version of Objective available. Changes can be viewed or accepted to create a version is displayed.

4. Update the required information and click Submit
5. To create a draft of the Objectives Library, click Save.
6. To publish the Objectives Library, click Submit.  
The Objectives Library summary page is displayed.

**Note**

The version number column is updated to the newer version.

## Preview Updates of a Objectives Library

1. Navigate to Care Management > Care Plans > Objectives Library.  
The Objectives Library summary page is displayed.
2. Select a draft version of an Objectives Library with multiple versions.
3. In the Actions column of the appropriate Objectives Library, click  > Edit.

**Important**

A message There is a new version of Objectives Library is available. Changes can be viewed or accepted to create a version is displayed.

4. Click Preview Version.  
The Preview Version Update pane is displayed.
5. You may click Cancel to return to the Edit Objective Library page.
6. To apply the changes to child artifacts, click Update.  
A confirmation message is displayed.
7. Click Yes.

**Important**

The message There is a new version of Objective Library is available. Changes can be viewed or accepted to create a version is removed and the draft status is displayed.

8. To create a draft of the Objective Library, click Save.
9. To publish the Objective Library, click Submit.  
A confirmation message is displayed.
10. Click Yes.  
The Objective Library summary page is displayed and the status is updated to Published.

## Actions Library

Use the actions library to create a TruCare action definition that you can reuse in multiple objectives and care plans. Actions help case managers outline the activities needed to achieve an objective. You can also copy existing TruCare action definitions as a starting point for your own.

TruCare provides the following action types:

- **Assessment Task** — Define an action to conduct an assessment.
- **Intervention** — Define an intervention that creates a task assignable to a user, team, queue, or assigned team.
- **Service Request** — Define an action that creates a draft Service Request in TruCare. Service Requests cover non-medical services requested on behalf of the member, such as housekeeping, meal preparation and delivery, or care companionship.
- **Task** — Define an action that generates a task based on a task definition previously created in the Tasks Library.
- **Text** — Define a custom action tailored to your organization's specific needs.

When you select the Text action type, the Text Type field appears. This field defines the text action as a Barrier, Member Strength, or another category. The Text Type value is required

when you choose the Text action type. A Text action type is a free-text, user-defined action that you can add to an objective or directly to a care plan. You can also configure care plan actions to trigger from an assessment. For example, you can add a member barrier at the care plan level if the same barrier applies to multiple objectives.

You can categorize text actions based on your organization's needs. For instance, you might define Member Preference and Member Approach as categories that Case Manager Administrators use to classify custom text actions. You configure these custom Text Type values in the Drop-Down Values section of Technical Configuration.

To view the Actions Library

1. Navigate to Care Management > Care Plans > Actions Library

The Actions Library summary page is displayed.

2. The Actions Library page displays the following options:

- Action Name
- Action ID
- Action Type
- Action Category
- Generate Tasks
- Status
- Version
- Custom
- Target Publish Date
- Action



### Note

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## Create an Actions Library

To create an Actions Library

1. Navigate to Care Management > Care Plan > Actions Library.
2. Click Create New Action.
3. Update the required information and click Submit.



### Note

- To set the Action in Draft status, click Save.
- To set the Action in Publish status, click Submit.


A Publish confirmation message is displayed.

4. Click Yes.

## Copy an Actions Library

**Prerequisites:** Navigate to Actions Library


To copy an Objective

1. In the Actions column, Click  > Copy.
  2. Update the required fields and click Submit.
- A Publish confirmation message is displayed.

3. Click Yes.

## View Action Library details

To View Action

1. Navigate to Care Management > Care Plans > Action Library.  
The Action Library summary page is displayed.
2. In the Actions column, click  > View.  
The Action Library details view Page is displayed.
3. Click Close to return to the Action Library summary page.




### Note

To view the Version History, click View Version History.

## Edit an Actions Library

To Edit an Actions Library

1. Navigate to Care Management > Care Plans > Action Library.  
The Action Library summary page is displayed.
2. In the Actions column, click  > Edit.  
The Action Library details edit Page is displayed.
3. Update the required information and click Submit.



### Note

From the Edit Actions Library screen, you may also choose to Disable or Unpublish an Actions Library line item.

#### Disable


1. Click Disable or Enable.  
A Confirmation message is displayed.
2. Click Yes.  
The status of the Actions Library is updated accordingly.

#### Unpublish

1. Click Unpublish or Publish  
A Confirmation message is displayed.
2. Click Yes.  
The status of the Actions Library is updated accordingly.

## Create Action Library Version

To Create Action Library Version

1. Navigate to Care Management > Care Plans > Action Library.
2. In the Actions column, click  > View.
3. Click Create Version.
4. Update the required information and click Submit.  
A confirmation message is displayed.
5. Click Yes.
6. To view the Actions Library Version History:
  - a. Click View Version History.

The versions pane is displayed.

- b. To view the Actions Library version, click the Version History tab.

To view the Parent Links

- a. Click View Parent Links.

The versions pane is displayed.

- b. To view the Parent Links, click the Parent Links tab.

To view the Child Links

- a. Click View Child Links.

The versions pane is displayed.

- b. To view the Child Links, click the Child Links tab.

## View an Actions Trigger Configuration Details

To view an Actions Trigger Configuration Details

1. Navigate to Care Management → Care Plan.
2. Click Actions Library tab.

The Actions Library summary page is displayed.

3. In the Actions column, click  > View.

The Actions Library page is displayed.

4. In the Questions Group, expand the appropriate question group.
5. Expand the appropriate question.
6. Hover over the appropriate trigger.


The View Trigger Configuration button is displayed.

7. Click View Trigger Configuration.

The View Trigger Configuration pane is displayed.

8. Click View Trigger Configuration.

The View Trigger Configuration pane is displayed.

9. Select the appropriate trigger.
10. In the appropriate Answer Actions Triggers tab, expand the appropriate trigger.
11. In the Actions column, click .

The View Detail pane is displayed.

12. Verify the Actions Trigger Configuration Details.
13. Click Close to return to the View Trigger Configuration pane.

## MCG Guided Care

### MCG guidelines report

You can generate a report that contains a list of all TruCare assessments that are linked to one or more MCG assessments. You can use this report for guidance to recreate links between TruCare assessments and a newer version of MCG Chronic Care Guidelines.

Zyter|TruCare recommends you generate this report before deactivating the guidelines from the selected content version. In this report, the following TruCare information is returned for each TruCare assessment that has been configured to trigger an MCG assessment.

- Assessment ID
- Assessment Type
- Status
- Ready to Export (Yes or No)

- Assessment name
- Question group name
- Question and associated answer
- Conditional Question and associated conditional question answer
- Name and version of the linked MCG assessment

The information above is shown for each answer set that contains a reference to an MCG assessment. Each set of information is sorted alphabetically.

The format of multi-select questions in the report is different from conditional logic questions. Multi-select questions are shown with the label followed by vertical check boxes, or a label, followed by three-column check boxes. Each answer choice is within its own box within the report and formatted as follows:

- Question Group
- Question Label
- Question Text
- MCG assessment

The report contains the following information:

- TruCare assessments linked with MCG assessments that are in the content version selected in the drop-down list
- BHP nodes and their associated MCG assessments that are in the content version selected in the drop-down list
- The Content Version

If there are no MCG assessments that are in the content version selected in the drop-down list linked to TruCare assessments, the following message is shown under the TruCare Assessments with Links to MCG assessments header.

No MCG assessments are linked to TruCare Assessments

If there are no BHP nodes configured with MCG assessments that are in the content version selected in the drop-down list, the following message is shown under the BHP Configuration header.

No BHP settings are configured for MCG assessments

The footer of the report includes the user name of the user who generated the report, the date and time the report was generated, and the page number.

If there are no links between TruCare assessments and MCG assessments, the report contains the following message:

No MCG assessments are linked to TruCare assessments.

## Importing MCG Guidelines in HTML5 Admin

This section outlines the process for importing MCG guidelines into the TruCare HTML5 Admin portal. It details each step an administrator must follow to retrieve, initiate, and validate the import of guidelines, including how to monitor progress and verify completion through system logs.

1. Begin by successfully retrieving the MCG guidelines from the designated content source in the HTML5 Admin portal.
2. Click on **Import Guidelines** to begin importing the retrieved guidelines.
3. A message will appear indicating that the import may take several minutes and that the user may freely navigate away from the screen while the process continues in the background.

4. While the import is underway, progress can be observed in the Assessment Summary section, where the number of assessments increases as guidelines are imported.
5. Upon successful completion, confirmation is recorded in the `server.log` file with a message such as: **"Import of MCG guidelines completed, total attempted <xx>, total successfully imported: <xx>"**
6. If the import fails, detailed information about the failed guidelines will be available in the `server.log` file for review and troubleshooting.

# Core Configuration

**Core Configuration:** The Core Configuration component is comprised of the tools to allow the customization, set up and management of the Core screens used throughout TruCare.

## Notes

You can use out-of-the-box notes, create new notes based on them, or build notes from scratch. TruCare includes standard notes installed by default, which serve as tools for data collection and presentation. The system can generate notes for certain artifacts to capture relevant member information.

- You can copy some out-of-the-box notes to use as a starting point for your own notes. (Note that some notes cannot be copied.)
- TruCare also makes certain note types available as note definitions when users create or edit custom notes.

You cannot edit notes integrated with Assessments, Care Plans and Nurse Triage through the Administration configuration. Although you can view these notes in TruCare Admin, you cannot edit or copy them. After you publish a note, you can version it. You update the version by adding or removing attributes.

In TruCare, any note already in progress does not automatically use the new version when you publish it. Only new instances of the note definition use the updated version. If the note has a Definition Type of Assessment Note, Question Group Note, Care Plan Note, or Problem Note, the system makes the new version available only when you update the parent artifact to use it. For all other Definition Types, TruCare automatically updates them to the latest version.

When you update a note associated with another artifact, such as an assessment, you must also version and update the parent artifact. TruCare flags the parent artifact with an indicator next to the note's name.

The table shows the note types that you can copy and the ones available as note definitions.

**Table 23. Note types and capabilities**

Note types	Can be copied	Available as note definition
Appeal Note		<input checked="" type="checkbox"/>
Assessment Note This note type is not applicable to MCG assessments.		<input checked="" type="checkbox"/>
Assessment Summary Note This note type is not applicable to MCG assessments.		<input checked="" type="checkbox"/>
Auth Note		<input checked="" type="checkbox"/>
Care Plan Note		<input checked="" type="checkbox"/>
Case Note		<input checked="" type="checkbox"/>
Clinical Note	<input checked="" type="checkbox"/>	
Conversation Note		
Cost Savings Note		<input checked="" type="checkbox"/>
Customer Service Note	<input checked="" type="checkbox"/>	
Discharge Note		

Note types	Can be copied	Available as note definition
Follow Up Note		<input checked="" type="checkbox"/>
Functional Note	<input checked="" type="checkbox"/>	
General Note	<input checked="" type="checkbox"/>	
ID Verification Note		<input checked="" type="checkbox"/>
Individual Service Plan Note		<input checked="" type="checkbox"/>
IP Prescreen Note		
Medication Notes		<input checked="" type="checkbox"/>
Member		<input checked="" type="checkbox"/>
Member Centered Plan Note		<input checked="" type="checkbox"/>
NICU Note	<input checked="" type="checkbox"/>	
Outcome Note		<input checked="" type="checkbox"/>
Problem Note This note type is not applicable to MCG assessments.		<input checked="" type="checkbox"/>
Quality Measures Note		No longer used
Question Group Note This note type is not applicable to MCG assessments.		<input checked="" type="checkbox"/>
Rx Prescreen Note		
Service Request Note		<input checked="" type="checkbox"/>
SP Prescreen Note		
Task Note		
Team Approach Note		<input checked="" type="checkbox"/>



### Note

You cannot copy, edit, unpublish, or disable the Inpatient Prescreen, Service Procedure Prescreen, and Rx Prescreen notes. TruCare captures prescreen information in these notes at a global level, configured through the System Management section in TruCare Admin. When authorization is not required, TruCare also provides additional note types for capturing IP, SP, and Rx prescreen data.

## Note permissions

The table describes what the user can do in TruCare if specific permissions for notes are granted on their own.

Permissions	From Documentation > Notes summary screen	From the artifact (for instance, from within an auth, AAG, appeal...)
Create	<ul style="list-style-type: none"> <li>Cannot add a new instance of the note type.</li> <li>Cannot view or add a comment to an existing note.</li> </ul>	<ul style="list-style-type: none"> <li>Can add a new instance of the note type.</li> <li>No view link; cannot add a comment to an existing note.</li> </ul>

Permissions	From Documentation > Notes summary screen	From the artifact (for instance, from within an auth, AAG, appeal...)
View	<ul style="list-style-type: none"> <li>Cannot add a new instance of the note type.</li> <li>Can view an existing note but cannot comment.</li> </ul>	<ul style="list-style-type: none"> <li>Cannot add a new instance of the note type.</li> <li>Cannot view or add a comment to an existing note.</li> </ul>
Edit	<ul style="list-style-type: none"> <li>Cannot add a new instance of the note type.</li> <li>Cannot view or add a comment to an existing note.</li> </ul>	<ul style="list-style-type: none"> <li>Cannot add a new instance of the note type.</li> <li>Can view or add a comment to an existing note.</li> </ul>
Edit with View	<ul style="list-style-type: none"> <li>Cannot add a new instance of the note type.</li> <li>Can view or add a comment to an existing note.</li> </ul>	<ul style="list-style-type: none"> <li>Cannot add a new instance of the note type.</li> <li>Can view and add a comment to an existing note.</li> </ul>



### Note

For users to create a PDF of a note, they must have View permission in addition to Create and Edit for the permission **ViewNoteWithComments**.

## Create a Note Definition and Add Attribute

To create a Note Definition

- Navigate to Core Configuration > Notes.  
The Notes Summary screen is displayed.
- Click **Create Note**.  
The Create Note screen is displayed.
- The Create Note Definition screen displays the following options:
  - Note Type
  - Note Description
  - ID
  - License Feature
  - Version Comments
  - Definition Type
  - Programs
  - Target Publish Date
  - Note Body Required
  - Ready To Export
- Enter the required information and click **Add Attribute**.  
The Current Attribute section is displayed.
- The Current Attribute section displays the following options:
  - Label
  - Type
  - Required
- Enter the required information and click Add Submit.

**Note**

You can click **Save Draft** to save the Note Definition in Draft status.  
To publish a Draft Note Definition, click Edit > Submit.

## Edit a Note Definition

To Edit a Note Definition

1. Navigate to Core Configuration > Notes.
2. In the Action column, click > Edit  
The Edit Note screen is displayed.
3. Update the required information and click Submit.  
The Note Definition is saved in Published status.

**Note**

You can click Save Draft to save the Note Definition in Draft status.  
To publish a Draft Note Definition, click Edit > Submit.  
Once you publish a note, you can only view it and can no longer edit it.

## View a Note Definition

To view a Note Definition

1. Navigate to Core Configuration > Notes.
2. In the Action column, click > View.  
The View Note screen is displayed.
3. Click Cancel to return to the Note Definition summary page.

**Note**

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## Copy a Note

To copy a Note Definition

1. Navigate to Core Configuration > Notes.
2. In the Action column, click > Copy.  
The Copy Note screen is displayed.
3. Verify the details and click Submit.


## Create a Version for Note Definition

When you select a definition type, you associate a note type with an artifact—such as an assessment, care plan, member, problem, authorization, case, appeal follow-up, MCP, question group, medication, or service request.

- If you select a Member note definition, users can create the note from the Notes Summary screen in TruCare.
- You can associate member notes with a specific case or authorization.
- Users can access other note definition types (assessment, care plan, problem, authorization, case, medication, appeal, and follow-up) only within their relevant areas.

- To make a note appear in the Assessment, Care Plan, Authorization, Case, Appeal, or Follow-Up area, you must define and publish the note definition, then copy or create the related assessment or care plan to associate it.
- TruCare uses system note types—such as care plan and assessment notes—that you cannot copy as default note types on their associated artifacts.
- The note definition appears in the assessment or care plan only when the license feature and program match.

To create a Version for Note Definition

1. Navigate to Core Configuration > Notes.
  2. In the Actions column, click  > View.
  3. Click Create Version.  
The Create Version page is displayed.
  4. The Create Version page displays the following options:
    - Note Type
    - Note Description
    - Note ID
    - License Feature
    - Programs
    - Version Comments
    - Definition Type
    - Target Publish Date
    - Note Body Required
    - Ready To Export
  5. Enter the required information and click Submit.
  6. To view the Notes Version History:
    - a. Click View Version History.  
The versions pane is displayed.
    - b. To view the Notes version, click the Version History tab.
- To view the Parent Links
- a. Click View Parent Links.  
The versions pane is displayed.
  - b. To view the Parent Links, click the Parent Links tab.

## Tasks And Queues

### Tasks And Queue Management

#### Task management

You can configure the columns that appear in the TruCare My Tasks, Team, and Personal Queue browsers.

#### View Task Management

To view Task Management

1. Navigate to Core Configuration > Tasks and Queues > Task and Queue Management > Task Management.
2. The Task Management screen displays the following options:
  - Name

- Description
- RTE (Ready To Export)
- Action

## Edit Task Management

To edit Task Configuration (My Tasks, Team Queue, or Personal Queue).

1. Navigate to Core Configuration > Tasks and Queues > Task and Queue Management > Task Management.
2. In the Action column, click EDIT.  
The Edit screen is displayed.
3. Drag and drop the required options from the Available Columns to Selected Columns and vice versa as required.
4. Update the Ready to Export option.
5. Click Submit

## Queue management

You can view the standard TruCare queues, create custom queues, and edit them as needed.

- Select, remove, and reorder the columns that appear in each system and custom queue.
- After creating a queue, update its description, adjust the "ready to export" setting, and manage the columns by selecting, removing, or reordering them.
- You cannot edit any other queue attributes. However, if the queue is disabled, you can still edit the description and manage the columns.

## View Queue Management Summary

To view Queue Management Summary

1. Navigate to Core Configuration > Tasks and Queues > Task and Queue Management > Queue Management.
2. The Queue Management Summary screen displays the following options:
  - Name
  - Description
  - System
  - License Feature
  - Program
  - Status
  - RTE (Ready To Export)
  - Action



### Note

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## Create a queue

Create a queue for a license feature and, if applicable, a program.

1. Navigate to Core Configuration → Tasks and Queues → Task and Queue Management → Queue Management.
2. Click **Create Queue**.
3. The CREATE screen displays the following options:



- **Queue Name** — Enter the name of the queue.
- **License Feature** — Select the applicable license feature for the queue from the drop-down list.
- **Program** — When you select CM, DM, UM, or HCS as the license feature, the **Programs** drop-down list allows you to select the program.  
To clear the selection, open the drop-down list, then press **Ctrl+Shift+Space**.
- **Description** — Optionally, enter a description for the queue.
- **Ready To Export** — Select this option to mark the configuration as ready to be exported from TruCare Admin and then imported to TruCare. A check mark appears in the **RTE** column in the summary grid for queues that have the **Ready To Export** check box selected. See the [TruCare Import Export Admin Guide](#) for more information about export/import processes.
- Available Columns
- Selected Columns

#### 4. Click **Submit**.

On successful save, the Queue Management summary screen is displayed.


## Edit a Queue

To edit a Queue

1. Navigate to Core Configuration > Tasks and Queues > Task and Queue Management > Queue Management.
2. In the Actions column, click  > Disable or Enable.
3. In the Actions column, click  > Edit.
4. Update the required information in the fields or Ready To Export.
5. Click Submit.

## View a Queue


To view a Queue

1. Navigate to Core Configuration > Tasks and Queues > Task and Queue Management > Queue Management.
2. In the Action column, click  > View.
3. The VIEW screen displays the following fields:
  - Queue Name
  - License Feature
  - Program
  - Status
  - Ready To Export
  - Last RTE
  - Description
  - Available Column
  - Selected Column
4. Click close to return to the Queue Management summary screen.

## Enable or Disable Custom Queues

To Enable or Disable Custom Queues

1. Navigate to Core Configuration > Tasks and Queues > Task and Queue Management > Queue Management.  
The Queue Management summary page is displayed.

2. In the Actions column, click  > Enable or Disable.  
A Disable Queue Item message is displayed.
3. Click Yes.  
The Status is updated to Enabled or Disabled accordingly.

## Task Library

### Create Task Definition

To create Task definition

1. Navigate to Core Configuration > Tasks and Queues > Task Library.  
The Task Library summary page is displayed.
2. Click Create New Task.
3. Enter the information in the required fields:
  - Activity Type
  - Task Activity
  - Task Activity Custom (Only available when Task Activity = Other)
  - Task ID
  - Assignee Type
  - Category
  - Priority
  - Target Publish Date
  - Task Due Date Offset in Days
  - Ready to Export



#### Note

The import and export (IMEX) process will fail if the Parent artifact is RTE-enabled but the Child artifacts are not RTE-enabled. The error caused by the incorrect artifact is logged in the **tc\_infolog** table, along with a reference to the linked Child artifact.

You can export successfully only if RTE is enabled for both the Parent and Child artifacts.

- Description
4. Click Submit.  
A confirmation message is displayed.
  5. Click Yes.



#### Note

If you click Cancel, the system displays a confirmation message. Click Yes to discard the entry.

### View Task definition

To view Task definition

1. Navigate to Core Configuration > Tasks and Queues > Task Library.  
The Task Library Summary page is displayed.
2. The Task Library Summary page displays the following columns:
  - Task Activity

- Activity Type
- Task ID
- Category
- Assignee Type
- Assignee
- Target Publish Date
- Status
- Ready to Export

**Note**

The import and export (IMEX) process will fail if the Parent artifact is RTE-enabled but the Child artifacts are not RTE-enabled. The error caused by the incorrect artifact is logged in the **tc\_infolog** table, along with a reference to the linked Child artifact.

You can export successfully only if RTE is enabled for both the Parent and Child artifacts.

- Action

**Note**

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## Edit a Task Library

To edit a Task Library

1. Navigate to Core Configuration > Tasks and Queues > Task Library.  
The Task Library Summary page is displayed.
2. In the Action column, click > Edit.  
The Task Library definition screen is displayed.
3. Update the required information and click Submit.

**Note**

To enable or disable a Task Library, click Enable or Disable on the Edit Task Library page.

## Copy Task Library Definition

To Copy Task Library Definition

1. Navigate to Core Configuration > Tasks and Queues > Task Library.  
The Task Library summary screen is displayed.
2. In the Action column, click > Copy.  
The COPY screen is displayed.
3. Update the required information.


**Note**

You can create a draft or publish the copied task library.

- a. To create a draft of the task library, click Save.
  - b. To publish the task library, click Submit.
4. A confirmation message is displayed.

## View Task Library Definition

To view Task Library Definition

1. Navigate to Core Configuration > Tasks and Queues > Task Library.  
The Task Library Summary page is displayed.
2. In the Action column, click  > View.  
The View screen is displayed.
3. The Task Library Definition displays the following fields:
  - Task ID
  - Activity Type
  - Task Activity
  - Category
  - Priority
  - Assignee Type
  - Target Publish Date
  - Created Date
  - Task Due Date Offset In Days
  - Ready to Export



### Note

The import and export (IMEX) process will fail if the Parent artifact is RTE-enabled but the Child artifacts are not RTE-enabled. The error caused by the incorrect artifact is logged in the **tc\_infolog** table, along with a reference to the linked Child artifact.

You can export successfully only if RTE is enabled for both the Parent and Child artifacts.

- Description

## Task Packages

Task Packages group related tasks together. You can configure these groups for use when enrolling a member in an HCS waiver program or a condition-specific program. When you submit the enrollment, the system generates all the tasks in the selected task package. By grouping tasks into packages, you can select a single package instead of choosing multiple individual tasks.

## Create Task Packages

To create task packages

1. Navigate to Core Configuration > Tasks and Queues > Task Packages.
2. Click Create New Task Package.
3. Enter the required information in the following fields:
  - Name
  - Task Package ID
  - Category
  - Description

- Target Publish Date
- Ready to Export

**Note**

The import and export (IMEX) process will fail if the Parent artifact is RTE-enabled but the Child artifacts are not RTE-enabled. The error caused by the incorrect artifact is logged in the **tc\_infolog** table, along with a reference to the linked Child artifact.

You can export successfully only if RTE is enabled for both the Parent and Child artifacts.

- Selected Tasks
4. Click Submit.  
A confirmation message is displayed.
  5. Click Yes.


## View Task Packages Summary

To view Task Packages Summary

1. Navigate to Core Configuration > Tasks and Queues > Task Packages.  
The Task Packages summary screen is displayed.
2. The Task Packages summary screen displays the following options:
  - Task Package Name
  - Task Package ID
  - Category
  - Target Publish Date
  - Status
  - RTE (Ready To Export)
  - Action

## Edit Task Package

To edit a Task Package


1. Navigate to Core Configuration > Tasks and Queues > Task Packages.
2. In the Actions column, click  > Edit.
3. Update the required information and click Submit.

**Note**

Click Disable and Unpublish to disable or unpublish the task package.


## Copy Task Package

To copy task package

1. Navigate to Core Configuration > Tasks and Queues > Task Packages.
2. In the Actions column, click  > Copy.  
The Copy task package screen is displayed.
3. Update the required information and click Submit.  
A confirmation message is displayed.
4. Click Yes.

## Add or Edit Task Package definition

To Add or Edit Task Package definition

1. Navigate to Core Configuration > Tasks and Queues > Task Packages.
2. In the Actions column, click  > Edit.
3. In the Selected Tasks section, click Add Required Tasks or Add Optional Tasks.



### Note

TruCare Admin enables the Add Required Tasks and Add Optional Tasks options only for Task packages in Draft status.

If you want to add or edit a published task package, unpublish it to enable the Add Required Tasks and Add Optional Tasks buttons.

The Add Required Tasks or Add Optional Tasks pane is displayed.

4. Select or Deselect the Tasks Activity as required.
5. Click Add Selected.

The selected package is added to the Selected Task section.

6. Click Submit.

A confirmation message is displayed.

7. Click Yes.

## Task Configuration

### Task attempt types

You can add, edit the label, or disable or enable a custom attempt type. Attempt types are used to track outreach campaigns to targeted members.

TruCare users track campaign calls in TruCare on the **Attempts** tab of the **View/Edit Tasks** screen.

### Add task attempt type

To add a task attempt type

1. Navigate to **Core Configuration** → **Tasks and Queues** → **Task Configuration** → **Task Attempt Types**.

The Task Attempt Type screen is displayed.

2. Enter the required information in the following fields:



### Note

The mandatory fields are denoted with an \*

- **Name** — Enter the name of the task attempt type. There is a length restriction of 100 characters, and it must be unique.
- **Label** — Enter the label of the task attempt type. The label appears in TruCare. There is a length restriction of 100 characters, and it must be unique.
- **Behavior Type** — From the drop-down list, select the behavior of the task attempt type. The default value is **Admin**. The default options are:
  - **Admin**
  - **Inbound Call**
  - **Outbound Call**

**Note**

You cannot disable the default options.

**3. Click Add New.**

A new Task type added successfully message is displayed.

The new task attempt type is added to the task attempt type summary.

## Enable or disable task attempt type

You can enable or disable task attempt types. This is useful when two different attempt types have the same name and label.

You can define two attempt types with the same name and label with different behavior types, but you can have only one enabled (active) at a time.

1. Navigate to **Core Configuration** → **Tasks and Queues** → **Task Configuration** → **Task Attempt Types**.
2. In the Disable/Enable column, click the toggle switch to enable or disable the **Task Attempt Types**.

A Disable or Enable confirmation message is displayed.

**3. Click Proceed.**

## Tasks Attempt Intervals

Users attempt tasks within defined time intervals. For example, if the morning interval begins at 6:00 AM and the afternoon interval begins at 12:00 PM, the morning interval lasts 6 hours. If a user calls a member during that time, for example, at 10:30 AM, the system classifies it a morning call.

## Time zone consideration

TruCare determines the member's time zone based on the member's postal code as specified in the member feed. If the member is associated with multiple postal codes, TruCare uses the most recently added postal code.

Each postal code is also entered in the Postal Code Time Zone table in the Zyter|TruCare database with an associated time zone. TruCare uses the entry in this table to determine the member's time zone. If a postal code entry is not found in this table, TruCare uses the server's time zone for purposes of setting task attempt time intervals.

If you get unexpected values for task attempt time intervals, Zyter|TruCare recommends that you ensure that the Postal Code Time Zone table has all necessary entries and that you do not manually convert the default server time zone settings.

To edit the Tasks Attempt Intervals

1. Navigate to **Core Configuration** → **Tasks and Queues** → **Task Configuration** → **Task Attempt Intervals**.
2. Click Edit.
3. in the Start Time column, update the required time.

**Note**

To enable or disable a Time Interval, click the toggle switch in the Status column. Ensure that the total duration for all enabled intervals must be 24 hours.

**4. Click Submit.**

A Task Time Intervals updated message is displayed.

## Task Refresh Interval

To enable or disable the Task Refresh Interval

1. Navigate to **Core Configuration** → **Tasks and Queues** → **Task Configuration** → **Task Refresh Interval**.



### Note

You can enable or disable the ability to refresh the tasks list and group queues every 120 seconds.

2. Click **Edit**.
3. Click **Yes** or **No**.
4. Click **Submit**.

A confirmation message Task/Queue auto refresh is enabled is displayed.

## Correspondence

The Correspondence feature allows you to design letter templates, which are used to create letters that can be sent to a variety of recipients, including members, providers, or both, at different points in the TruCare workflow.

TruCare includes a standard set of default letter templates for Case Management, Disease Management, and Utilization Management. License features determine which letter templates TruCare administrative users have access to.

Administrative users can:

- Use default letter templates to create letter templates for customer-specific programs.
- Create new letter templates.

## Correspondence overview

Learn how to generate TruCare correspondence, explore its features, and understand what it is.

### Defining correspondence

In TruCare, the term *correspondence* refers to letters that can be printed as PDFs or sent as faxes to members, providers, and facilities, for example. Correspondence can be created in one of these ways:

- Manually, in TruCare. See the section on creating correspondence [TruCare User Guide] for more information.
- Automatically, for UM correspondence, by the Correspondence module in TruCare Admin. Correspondence is generated when conditions you specify in one or more rules are met. The Correspondence module is installed by default with TruCare.
- Automatically, for CM and DM correspondence, by the LoB module. See [Customer setup in Line of Business \[47\]](#) for more information.
- Automatically, by the Distributed Correspondence module in TruCare Admin. Distributed Correspondence, which is a separately licensed module, allows you to use a third-party system to manage creating and distributing correspondence.



### Note

You can configure a TruCare environment to use either the Correspondence module or the Distributed Correspondence module, but not both.

This section describes how to use the Correspondence module. If you have installed the Distributed Correspondence module, see the [Distributed Correspondence Admin Guide](#).

## Enclosures

An *enclosure* is a separate document included with a letter. Examples of enclosures include exercise tips for the elderly, smoking cessation strategies, or diet recommendations for diabetics. Enclosures are composed outside of TruCare. File extensions (.pdf, for example) and file size limits specified in TruCare Admin (System Management > Upload Management) apply to enclosures.

You can associate enclosures with templates and with rules used to generate automated correspondence. You can also choose the order in which they are included in the letter.



### Note

The order of enclosures specified in a template takes precedence over the enclosure order specified in a rule.

## Automated UM correspondence

You can use rules to control when to generate UM correspondence. In TruCare, rules are evaluated when an event, such as a determination, occurs. So, you might configure a rule to generate a letter when an authorization is approved (and that rule, or the template you use for the letter, might include an enclosure notifying the recipient of facilities that provide appropriate treatment, for example). See [Automating correspondence \[158\]](#) for more information on how to create and work with rules in the Correspondence module and how rules are evaluated.

## Correspondence tags

*Correspondence tags* are predefined variables you can use when composing a template. Correspondence tags vary based on the license you associate with a template. For example, for the UM license, you can select tags for diagnosis and program enrollment. TruCare provides the values for the correspondence tags in a template when the letter is generated (whether manually or automatically). You can also create user-defined correspondence tags for use in templates. See [Correspondence tags \[153\]](#) for more information.

## Managing mailings

TruCare creates a meta file for each correspondence whose delivery method is set to **Print to Queue**. The meta file contains information about the correspondence, including letter, mailing, and recipient IDs that allow you to uniquely identify a given correspondence.

The meta file is a JSON file, which conforms to a schema described in [Correspondence metafiles](#).

See [Correspondence metafiles](#) for more information.

## Correspondence tags

Correspondence tags allow TruCare to pull stored data into the appropriate section of a letter template.

Correspondence tags, such as member name, provider name, user note, and denial reason, are placeholders for variables you can add to letter templates. For example, if a user is sending a letter to a member named Mary Jones and the address section of the letter template contains the tag **Member Name**, the letter for Mary Jones is addressed to her.

Some correspondence tags are available only for specific license features. You can only view a license feature and therefore its corresponding tags if you have that license feature on your system.

# Templates

Each letter, whether printed as PDF or sent as a fax, is based on a template created using Microsoft Word. You can customize templates to include one or more images (a health plan logo or signature, for example) and enclosures (separate documents about smoking cessation or diet tips for diabetics, for example). Several default templates — for IP authorization and denial, for example — are installed with TruCare. You can use these default templates as is, customize them, or create your own.

You use templates for both manual and automated correspondence. For automated correspondence, you can associate different templates with different rule conditions. You can send different letters to members based on a diagnosis or where they are receiving treatment, for example. See [Create a Template \[154\]](#) for more information.



## Note

If you attempt to view a large number of correspondence templates, the system may freeze with an exclamation point error. For example, if you attempt to view 100 templates per page and clear the **Only show published entries** and **Only search current versions check boxes** from the Clinical Configuration → Correspondence page.

If you limit the number of templates you are viewing at a time, for example keeping the default settings of viewing 10 templates per page with the **Only show published entries** and **Only search current versions** check boxes selected, you may avoid the error.

## Create a Template

To create a template

1. Navigate to Core Configuration > Correspondence > Templates > Create Template.  
The Templates screen is displayed.
2. Enter the required information.



## Note

To save the template, you can click Save Draft.

The following template options are available based on these status:

- a. **Draft:** Preview, Copy, Void, Edit
  - b. **Publish:** Preview, Copy, Void
  - c. **Disable:** Preview , Copy
3. Click Submit.



## Note

You can change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## Edit a Template

To edit a template



## Note

You can edit only the templates that are in draft status.

1. Navigate to Core Configuration > Correspondence > Templates > Create Template.
2. Update the required information.

**Note**

To save the template, click Save Draft.


3. Click Submit.

**Note**

You can change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## Copy a Template

To copy a template

1. Navigate to Core Configuration > Correspondence > Templates > Create Template.
2. In the Actions column, click  > Copy.  
The Copy template screen is displayed.
3. Update the required information.

**Note**

To save the template, click Save Draft.


4. Click Submit.

**Note**

You can change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.


## Preview a Template

To Preview a template (Email)

1. Navigate to Core Configuration > Correspondence > Template.  
The Template Summary page is displayed.
2. In the Actions column, click  > Preview.  
A PDF pane is displayed with the correspondence template.
3. After reviewing the content, you may close the PDF preview pane.



## Copy a Template Version

To copy a template version

1. Navigate to Core Configuration > Correspondence > Templates.
2. Expand the appropriate template line item.
3. In the Actions column, click  > Copy Version.
4. Update the required information.
5. Click Preview Template.  
The template details are displayed in PDF viewer. You can print and or save the PDF.
6. Click Submit.

## Void a Template

To void a template (Email)

1. Navigate to Core Configuration > Correspondence > Template.  
The Template Summary page is displayed.
2. Void a template:
  - In the Actions column, click  > Void.  
A Void confirmation message is displayed.
3. Void a template version:
  - a. Expand the template.
  - b. In the Actions column, click  > Void.  
A Void confirmation message is displayed.
4. Click Yes.  
The Status of the Template changes to Disabled.

## Rule Summary

### Create a Rule

To Create a Rule

1. Navigate to Core Configuration > Correspondence > Rule Summary.  
The Rule Summary screen is displayed.
2. Click Create Rule.
3. The CREATe screen displays the following options:
  - Rule Name
  - Ready To Export
  - License Feature
  - Event Type
  - Rule Conditions
  - Rule Output
  - Select Template
  - Receipts and Task Configuration
    - Receipts
      - Receipt Type
      - Print to Queue
      - Fax
    - Task Configuration
      - Automatically generate letter without user intervention
      - Create task for letter review
        - Queue/Assignee
        - Priority
  - Enclosures
    - Add Enclosure
4. Click Submit.



#### Note

If you click Cancel, the system displays a confirmation message. Click Yes to discard the entry.

## View Rule Summary

To view Rule Summary

1. Navigate to Core Configuration > Correspondence > Rule Summary.  
The Rules summary page is displayed.
2. Click FILTER to filter by License Feature or Event Type.

**Note**

You can change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

3. In the Action column, Click > View.  
The View Rule Summary page is displayed.
4. Click Edit.  
The EDIT screen is displayed.
5. Update the required information and click Submit.
6. Click Disable to disable the rule summary.

## Edit Rule Summary

To edit a Rule Summary

1. Navigate to Core Configuration > Correspondence > Rule Summary.  
The Rules summary screen is displayed.
2. Click FILTER to filter by License Feature or Event Type.

**Note**

You can change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

3. In the Actions column, Click > Edit.  
The EDIT screen is displayed.
4. Update the required information and click Submit.

## Remove Rule Summary

To remove Rule Summary

1. Navigate to Core Configuration > Correspondence > Rule Summary.  
The Rules summary page is displayed.
2. In the Actions column, click > Remove.  
A Remove Rule confirmation message is displayed.
3. Click Yes.

## Enable or disable Rule Summary

To Enable or disable Rule Summary

1. Navigate to Core Configuration > Correspondence > Rule Summary.  
The Rules summary page is displayed.
2. In the Actions column, click > Disable.  
A Disable Rule confirmation message is displayed.
3. Click Yes.

## Download Rules

To Download Rules

1. Navigate to Core Configuration > Correspondence > Rule Summary.  
The Rules summary page is displayed.
2. Click Download Rules.  
The rule summary is exported as a .csv file with the filename formatted as YYYYMMDD.
3. Select the location to save the file.
4. Click Save



### Note

You can change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## Automating correspondence

You can configure rules to automate generating correspondence based on member- and authorization-specific conditions that you specify for UM determinations.

### Overview

TruCare supports automating correspondence based on rules that you specify for UM determinations. When the rule conditions are satisfied, TruCare generates letters associated with that rule.

In addition to rule conditions and optional rule inputs, you specify:

- the delivery method (Print to Queue or Fax) for each recipient
- the enclosures, if any, you want to include with the correspondence
- whether you want the correspondence reviewed before it is sent

### Templates

Each rule is associated with a template, which determines the composition of the generated letter. Templates are MS Word documents, which can include enclosures, images, and variables. Only active templates for the selected license feature are available when defining a rule. See [Using templates](#) for more information.

### Recipients

Each rule must specify at least one recipient (a member, provider, or facility, for example) and at least one delivery method (print, fax, or both) for the recipient. Available recipients are determined by the selected license feature.

### Understanding the delivery methods

When you choose the **Print to Queue** option, the **Print Queue Directory** field becomes enabled. Any value you enter is relative to the TruCare default correspondence print directory, which is specified in the `trucares.properties` file. For example if your default correspondence print directory is **C:\CorrespondencePrintDirectory** and you enter `high_priority` in the **Print Queue Directory** field, correspondence based on the current rule is saved to **C:\CorrespondencePrintDirectory\high\_priority**. That is, you can specify different print queue directories for different rules.

You can either select a folder from the **Folder Name** drop-down list or add a new folder as the printing destination folder. See [Configure Generic correspondence printing queue options](#).

If you do not specify a value for **Print Queue Directory**, any letters for which you select **Print to Queue** are saved to the default correspondence print directory.

You must have OpenText RightFax configured if you want TruCare to send faxes to your recipients. See the [TruCare Technical Reference Guide](#) for more information on both of these topics.

## Member and Member Designee recipients

You can select Member and/or Member Designee as letter recipients. If you select Member Designee and the member designee was not defined in keys: client, keys: tricare sends a letter to the member, even if you have not explicitly selected Member as a recipient. If you select Member, the letter is always sent to the member, regardless of the member designee status.

## Avoiding duplicate correspondence for recipients

<listitem>

In TruCare, you can associate individuals with multiple recipient types. You can specify the same person as both the Servicing Provider and Requesting Provider, for example. When this situation exists, TruCare ensures that only one letter is sent to an individual, comparing recipients using different mechanisms:

- An internal provider ID is used to distinguish recipients. This applies to only recipient types associated with the authorization, including the PCP (but not to the member, member designee, or member-specific contacts).
- Recipients with contact information that is associated specifically with an authorization (as might be the case with a Servicing Provider, for example) are considered unique.
- When a single individual is associated with multiple recipient types, TruCare uses the following hierarchy to ensure that the same individual does not receive duplicate correspondence:
  1. Requesting Provider
  2. Servicing Provider
  3. Servicing Facility
  4. Prescribing Provider
  5. Primary Care Physician (PCP)

</listitem>

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  1. Requesting Provider
  2. Servicing Provider
  3. Servicing Facility
  4. Prescribing Provider
  5. Primary Care Physician (PCP)

## Enclosure

In addition to specifying the enclosures to include with correspondence for a given recipient, you can also specify the order to print enclosures when the correspondence is created. (You can also add enclosures to templates. See [Add enclosures to a letter template](#) for more information.)

**Note**

The order of enclosures specified in a template takes precedence over the enclosure order specified in a rule.

## Options for reviewing automated correspondence

When specifying rules for automated correspondence, you can configure TruCare to:

- Automatically send generated correspondence to recipients without requiring a review
- Require that all generated correspondence be reviewed before it is sent

If you choose the latter option, TruCare creates a Review task assigned to the user or queue you specify (the current user is the default). You can also specify the task's priority and due date. TruCare also uses **Task Settings** information to create a task if generating correspondence fails. In this case, the type of task varies based on the type of error responsible for the generation failure. If the template is invalid, for example, TruCare creates a Notification task. For all other correspondence errors (a missing address for print, an invalid telephone number for fax, or mandatory user note tags in the template, for example), TruCare creates a Correspondence Review task and a draft letter. In addition to choosing a user or queue for the review task, you can specify the task priority and the number of days before the task is due.

**Note**

TruCare can display multiple warnings if automated correspondence generation fails (because the template is invalid, for example) and the user selected the **Go to Notification on Submit** option when submitting a determination. In this case, TruCare first displays a warning, notifying the user that the correspondence was not sent and to review the task that was created. The next message provides a link to that task, which opens the **Edit UM Notification** screen.

Similarly, using the **Next Task** option to create a task for a user to manually send correspondence might result in generating duplicate correspondence with rules you set up for generating automated correspondence.

Make your users aware of this behavior, and have them consider not using the **Go to Notification on Submit** option when submitting determinations and not using **Next Task** to create tasks for generating correspondence.

## Disabling rules

You can choose to disable rules, either while you are creating them or after you have put them into service. You might want to do this if you are creating or troubleshooting a rule with complex conditions that is not generating the correspondence you expect. TruCare displays a confirmation message when you disable a rule that is already in service.

## Understanding rule conditions and inputs

TruCare uses rule conditions you define to evaluate which line items trigger correspondence. You can optionally use rule inputs to include non-determined line items in the rule evaluation.

### Rule conditions

Each rule is defined by one or more *rule conditions*, which define the conditions to meet in order for TruCare to generate correspondence. When a rule contains more than one condition, TruCare evaluates them using an **AND** operation, meaning all conditions have to be met in order for the rule to evaluate to true.

The rule conditions you can define are determined primarily by the license feature, event type, and object. In correspondence rules, an object is an authorization or member. Once you

select these values, you specify the line item attributes you want evaluated and how you want to evaluate them. For example, for a UM (license feature) determination (event type) on an authorization (object), you might create a condition saying that the member's admission source must come from either a physician or clinic referral. You might also create a condition specifying that the admitting facility must be in the member's network. For line items that meet both of these conditions, TruCare can generate a letter informing the recipients you specified in the rule output (member, requesting provider, and servicing facility, for example) that the authorization was approved. A different letter, one informing the recipients that the authorization was denied, requires creating a separate rule to cover that set of conditions.

## Line item attributes match requirements

For all line item attributes, you can use Apply to Any or Apply to All controls to specify whether the attribute value in the rule condition you are defining can match any line item in a determination, or whether it must match all line items in a determination in order for the rule to evaluate to true.

Examples of attributes for which you can specify this matching requirement include Auth Line Type, Prescribing Provider in Network, and Treatment Type. For example, if you set the Auth Line Status attribute to Apply to All and set its value to Approved, an authorization with both approved and denied line items would not result in correspondence being generated because the rule would not evaluate to true.



### Note

The lists displayed in the **Value** field for the Auth Line Applied Eligibility and Product Feature attributes are populated by the Product feed. Make sure that the Product feed is part of your golden configuration environment and that it is kept current with any changes you make in your production environment.

## BHP nodes as rule conditions

You can specify Business Hierarchy Profile (BHP) nodes as attributes for rule conditions you define on the member object. You can specify the following operations for the BHP attribute value:

- Equal — The BHP node name, or the name of one of the node's ancestors, must match the value you specify.
- In List — The BHP node name must match at least one of the values in the list you specify.
- Not Equal — The BHP node name, or the name of one of the node's ancestors, cannot match the value you specify.
- Not In List — The BHP node name cannot match any of the values in the list you specify.

You must search for the BHP node name you want to use for a rule condition. That is, you cannot type a BHP node name directly in the **Value** field. The TruCare Admin user interface varies slightly based on the type of operation you choose, as summarized in this table:

Operation	
<ul style="list-style-type: none"><li>▪ Equal</li><li>▪ Not Equal</li></ul>	When you choose one of these operations, TruCare displays a <b>BHP Node Name</b> entry field. Select the <b>Search</b> button to search for the BHP node name you want to use in the rule condition.
<ul style="list-style-type: none"><li>▪ In List</li><li>▪ Not In List</li></ul>	When you choose one of these operations, TruCare displays a table with <b>BHP Node Name</b> and <b>Path</b> columns. Select the <b>Search</b> button to search for the BHP node names you want to use in the rule condition.

For any operation, when you select the **Search** button, TruCare displays the **Select BHP** dialog box. Type a value in the **BHP Node** field, and select **Search** to look up the BHP node name. If

the search returns multiple values, you can select only one of them if you are using the Equal or Not Equal operations. If you are using the In List or Not In List operations, select each check box to indicate the BHP node names you want to use (or use the **Select All** check box to add all BHP node names to the rule condition).

## UDFs in rule condition

You can define UDFs for use in rule conditions for numerous TruCare screens. See [User-defined fields in distributed correspondence](#).

Screen	Section	Domain Object	Rule Object
Demographics Screen	GeneralInformation	member	member
	MemberDetail		
Determination	DeterminationSection	determination	Authorization
Inpatient Authorization Request	Authorization	authorization	Authorization
	LineItem	inpatientLineItem	
	RXLineItem	rxLineItem	
	RequestingProvider	authorization	
	SPLineItem	spLineItem	
	ServicingFacility	authorization	
MedicaidCoverage PlanDetail	GeneralInformation	eligibility	Member
MedicareCoverage PlanDetail	GeneralInformation	eligibility	Member
RxAuthorization Request	RXAuthorization	authorization	Authorization
	RXLineItem	rxLineItem	
	RXRequestingProvider	authorization	
ServiceProcedure Authorization Request	SPAAuthorization	authorization	Authorization
	SPLineItem	spLineItem	
	SPRequestingProvider	authorization	

When creating or editing the UDF, make sure to select the Make Available To Letter Generation Evaluation check box. This will ensure that the UDF is available in the Attributes drop-down list when defining the rules used to generate automatic correspondence for UM determinations.

## Primary codes in rule conditions

The Rule Editor screen provides features that simplify specifying rule conditions that include Primary Diagnosis and Primary Procedure attributes:

- The Primary Diagnosis and Primary Procedure attributes support In List and Not In List operations. When you choose one of these operations, a **Search** button is displayed, allowing you to easily search for and select one or more of the results returned by the search. TruCare displays the diagnosis or procedure code in the **Value** of the Rule Condition table; multiple values are separated by a comma. A tooltip displays both the diagnosis/procedure code and name when you place the pointer on the code.
- You can use the Range operation to specify a range of diagnosis code or procedure code values instead of specifying code values individually. When you select the Range operation, TruCare displays two **Value** fields, each with its own search feature. The **Value** fields indicate the start and end of the range, and you can specify them in either order. After you specify the first value in the range, you can choose values from only the same code set to specify the other value in the range. For example, if the first value in your range belongs to the ICD-9 code set, when you search for the second value in your range, only codes from the ICD-9 code set are available. The condition you specify evaluates to true if the diagnosis

or procedure code value associated with the authorization is within the range you have specified, including the values used to specify its start and end.

## Rule inputs

By default, only an authorization's currently determined line items are evaluated by the correspondence rules you define. You can use rule inputs to define criteria that allow both previously determined and non-determined line items to be included in the rule evaluation.



### Note

In distributed correspondence, rule inputs are available only for the UM event type.

## All line items

To include all of an authorization's line items in the rule evaluation, select the **Include All Line Items** check box in the Rule Input section of the Rule Editor screen. You can use the **Filter By** field to include only those additional line items whose values for the attributes you select match the values of those attributes in a determined line item. One such filter is Request Date, shown here.

Defining such a rule input ensures that TruCare includes any additional line items in the authorization whose request date matches the request date of any currently determined line items. Other attribute values for the rule input filter are Line Item Type, Service Type, and Urgency.

The authorization in this illustration has five line items with three sets of request dates indicated by the different colors (line items 1 and 2 have the same request date, line item 3 has a different request date, and line items 4 and 5 share a third request date). In this example, line items 1 and 5 are determined.

Because the request date is used as a filter, in addition to line items 1 and 5, line items 2 and 4 are also used as inputs to the rule because each of them shares a request date with one of the currently determined line items.

## Exclude Notified Line Items

The **Exclude Line Items with Correspondence** check box excludes from evaluation any line items in the authorization for which UM correspondence has already been generated. This prevents the same correspondence from being generated multiple times for the same authorization.

## Use cases

Use cases illustrate how to use correspondence rule conditions, rule inputs, and rule output to integrate automated correspondence into your UM authorization workflows.

### Use case personae, organizations, and compliance

The use cases in this section employ these fictitious personae, organizations and compliance requirements:

- Mary and Arthur are TruCare users at Any Health Plan
- Bob is a member of Any Health Plan
- Physical Therapy Practice of MA is a rehabilitation services provider
- Any Health Plan has these compliance requirements:
  - Correspondence should not be generated for partially approved authorizations
  - When correspondence is generated for a subsequently added line item, correspondence generated for earlier line items should not be sent again
  - Correspondence should be generated when the service dates associated with a line item change

- The rules described in these use cases have the following basic configuration:
  - Event Type = UM
  - Object = Authorization

The following use cases describe the correspondence rules a TruCare administrator you might compose to ensure Any Health Plan's compliance requirements are met.

## Suppress Partial Approval Letters

On Monday, Mary receives a procedure request for a Physical Therapy Evaluation for Bob. She approves the line item and, as specified in the rule output, TruCare generates automated correspondence for both Bob and Physical Therapy Practice of MA.

On Thursday, Mary receives two additional procedure requests – one for Whirlpool Therapy, and another for Ultrasound. At this time, Mary approves only the Whirlpool Therapy. In this case, TruCare does not generate correspondence because the correspondence rule was configured to generate correspondence for only fully approved authorizations.

Such a rule might look like this (in addition to the basic configuration):

- Rule Conditions

Name	Value	Comment
Attribute	Auth Line Status	Only line items with a status of Approved meet this condition.
Operation	Equal	
Value	Approved	
	Apply to ALL	All line items in the authorization must have a status of Approved for the rule to evaluate to true.

- Rule Input

Name	Value	Comment
Exclude Line Items with Correspondence	Selected	Line items for which correspondence has already been generated are not evaluated by the rule.

## Suppress Duplicate Line Item Letters

The following week, after a peer-to-peer (P2P) review Mary approves the line item for the ultrasound. New correspondence is generated for the ultrasound service request because the line item has a status of Approved. Now, all the line items in the authorization match the conditions specified in the rule, but TruCare excludes the line items for the physical therapy evaluation and whirlpool therapy evaluation: they are filtered out by the Exclude Line Items with Correspondence rule input check box because correspondence was generated for those line items when they were previously approved.

## Correspondence on Authorization Edit

On Wednesday of the following week, Arthur changes the start date of the whirlpool therapy because the facility was closed longer than expected for routine maintenance. TruCare generates correspondence because a rule was specified with the following configuration to ensure compliance in situations like this.

- Rule Conditions

Name	Value	Comment
Attribute	Line Item Date Edited	You can use the Line Item Edited attribute to define a rule condition based on these changes to a line item: <ul style="list-style-type: none"> <li>▪ Place of service</li> <li>▪ Procedure code (primary)</li> <li>▪ Provider</li> </ul>

Name	Value	Comment
		<ul style="list-style-type: none"> <li>▪ Requesting provider</li> <li>▪ Service type</li> <li>▪ Stay level</li> <li>▪ Unit count</li> <li>▪ Urgency</li> </ul>
Operation	Changed	<p>The Changed value considers any change to the line item date you specify in the Value field. If you prefer, you can specify that the change must be one of the following:</p> <ul style="list-style-type: none"> <li>▪ Pre-dated (changed to an earlier date)</li> <li>▪ Post-dated (changed to a later date)</li> </ul>
Value	<ul style="list-style-type: none"> <li>▪ Service Start Date</li> <li>▪ Service End Date</li> </ul>	
	Apply to Any	Any line item in the authorization whose service start date or end date has changed satisfies this condition and causes the rule to evaluate to true.

#### ▪ Rule Input

Name	Value	Comment
Exclude Line Items with Correspondence	Cleared	You might want TruCare to generate correspondence when a line item date changes even if correspondence has already been generated for the line item (such as when it was initially approved, for example).

When determining whether or not a line item or line item date has changed, TruCare compares the line item's current data with data at the time of the most recent authorization (with a status other than Pending).

## User-defined tags

This feature allows you to design custom tags for use in correspondence templates and letters.

These tags are not linked to a field in the database but allow you to preset the value or edit the letter at the time of generation. Tags are created by license features.

You can specify where the text of the tag is set, according to the following hierarchy.

1. Template
2. BHP
3. Company Group
4. Default Text

You can select multiple locations for tags. You can add BHP tag values to a BHP node at any level and you can configure BHP-specific text.

## Create a letter template

Create a letter template to use in correspondence.

1. Click Core Configuration → Correspondence.
2. Click the **Templates** tab.
3. Click **Create Template**.

4. Complete the fields as needed.
  - **License Feature** — Select the license feature you want to associate with the template.
    - **Program** — You can select the program to associate to the letter template. This option is only available for these license features:
      - CM
      - DM
      - HCS
      - UM
    - **Screens Available** — This field displays when you select Medication Management as the license feature. Select the TruCare screen where you want to make the letter template available.

If you want to select both available screens, press and hold Ctrl on your keyboard, then select both screens.



### Important

We recommend that you make medication action plan letter templates available for use only on the Medication Action Plan screen. This ensures that:

- Correspondence related to medication action plans includes the medication action plan and recommendations. For more information on medication action plans and recommendations, see Medication Action Plan.
- Correspondence that isn't related to medication action plans does not get generated from the Medication Action Plan screen.

If you apply this configuration, users can still view, resend, and void the submitted medication action plan correspondence from the Correspondence screen.

- **Name** — Enter the letter template name.
  - **Description** — Enter a description of the letter template.
  - **Effective Date** — This is the date that the new letter template becomes effective in TruCare.
 

Two versions of the same template cannot have the same effective date.
  - **Hide Country In All Addresses and Phone Numbers** — This is enabled by default.
 

If you want the country and the country code on the letter, clear the check box.
5. To download a blank template to save to your system, click **Download Blank Template**. Note the name and location of the file.
    - Once a blank template has been saved to a folder, you can skip this step.
    - You can create new letters with the saved template and upload them.
    - You can configure the size and types of files allowed in the **Upload Management** section.
  6. In Microsoft Word, open the blank template file that was previously downloaded.
 

Make sure that Microsoft Word is showing field codes. To do this, press <Alt+F9>. This toggles between showing field codes and showing field code results. The standard blank template includes field codes in a table at the top of the template. If the template opens blank, you are not showing field codes. The setting persists in future Microsoft Word sessions.
  7. Using the standard Microsoft Word functionality, create your letter.
  8. Add tags and table tags to the letter template.

(For more information on adding basic correspondence tags, adding table correspondence tags, adding standard image correspondence tags, adding library image tags, adding user-defined correspondence tags, and adding user note correspondence tags, refer to [???](#).)



### Important

Ensure that you add all necessary tags to the letter template. For example, if you want to create a letter template that utilizes medication action plan recommendations, you must add the respective recommendations tags to the template.

9. Add images in the template.
10. Save the Microsoft Word document with a new name. Note the name and location of the file.



### Note

The correspondence template file name cannot contain spaces.

11. In TruCare Admin, to upload the template that was saved in the previous step into TruCare, click **Upload Template**.

If there are problems with the template, validation errors can appear. Resolve these in Microsoft Word and reupload the template.

- The following are samples of errors:
  - The following tags have been detected that are invalid or not supported:
  - The following image tags have been detected that are invalid:
  - Tag detected that is disabled:
  - Tag detected for an invalid license feature. This is a <letter type> letter, but the tag <invalid tag> is a <appropriate license> tag.
  - Tag inside user note encountered. Tags are not allowed inside User Notes.
  - Tag in invalid location encountered: <Tag name> User Note Description tags cannot contain other tags.
  - User Note Start Tag encountered, but there is a currently open user note: <tag name> There may be a missing matching user note end tag.
  - User Note End Tag encountered, but there is not a currently open user note: <tag name> There may be a missing matching user note start tag.
  - Mandatory User Note Start Tag encountered, but there is not a currently open user note: <tag name> There may be a missing matching user note end tag.
  - Mandatory User Note End Tag encountered, but there is not a currently open mandatory user note: <tag name> There may be a missing matching mandatory user note start tag.
  - User Note Description Start Tag encountered, but there is a currently open user note description: <tag name> There may be a missing matching user note description end tag.
  - Tag: <tag name> cannot be used unless it is contained in either a UserNote or MandatoryUserNote tag.
  - User Note Description End Tag encountered, but there is not currently open user note description: <tag name> There may be a missing matching user note description start tag.
  - Table End Tag encountered, but there is no currently open table: <tag name> There may be a missing matching table start tag.
  - Mismatched table tags detected.

- UserNoteStart tag was detected without matching UserNoteEnd tag.
- MandatoryUserNoteStart tag was detected without matching MandatoryUserNoteEnd tag.
- UserNoteDescriptionStart tag was detected without matching UserNoteDescriptionEnd tag.
- Table start tag detected without matching table end tag.

12. You can optionally:

- Add images
- Add user-defined tags
- Add enclosures
- Configure the format of the date and time for the correspondence

13. To preview the letter template, click **Preview Template**.

14. To save the template and publish it later, click **Save**.

- If there is a problem with the template, validation errors can appear. Resolve them in Microsoft Word and reupload the template before saving the template.
- The letter template is available in TruCare after you publish it. You can not edit the letter template after you publish it. To change a published template, you can copy it, make changes, and save it as a new letter template.
- To publish the letter template and make it available in TruCare, click **Publish**.
- The status of the letter is not affected.

Be aware of the following:

- All tags are shown as tags; no actual data is provided.
- Images that come from an `<images>` tag display the tag in place of the actual image.
- Tables show only a single row.

15. Set the appropriate TruCare permissions. The configuration inputs that you choose for the letter template determine the permissions needed to view and utilize the letter template in TruCare.

For example, if you configure a letter template for the Medication Management license feature as available on the Correspondence screen, the user needs the appropriate permissions associated with this screen in TruCare and the necessary permissions to utilize the TruCare correspondence feature.

For more information on TruCare permissions, see Permissions.

## Add standard images to a letter template

You can specify the images shown in the letter template. You can add an image to a letter template when creating, editing, or copying a letter template.

You can edit a letter template only when the status is **Draft**. The following image types are supported in TruCare for correspondence:

- **.jpg**
- **.jpeg**
- **.png**
- **.gif**

1. Click Clinical Configuration → Correspondence.
2. To create a template, click **Create New Template**.

To edit a template, click to highlight the template. In the table at the bottom of the screen, click **Edit** in the **Actions** column.

To copy a template, click to highlight the template. In the table at the top, click **Copy** in the **Action** column. Or, in the table at the bottom of the screen, click **Copy Version** in the **Action** column.

3. Click the **Images** tab.
4. To search for, upload, and preview images to add to the template, click **Library Image Browser**.



### Note

You can use the **Search** tab of the **Select Image** dialog box to search for all images that were previously inserted into a letter template.

5. Click one of these links to choose an image type.
  - **BHP** — Use this link to select an image to override the logo indicated by the member's BHP.
  - **Company Group** — Use this link to select an image to override the company logo indicated by the user's company group.
  - **Logo 3** — Use this link to add a third logo to appear when a letter is generated using this template.
  - **Logo 4** — Use this link to add a fourth logo to appear when a letter is generated using this template.
  - **Signature** — Use this link to define an electronic signature to appear when a letter is generated using this template.
6. Select the **Select Images** check box to add an image.
7. Click the ellipsis button to navigate to the desired image file.
8. To save your edits, click **Submit**.
9. To submit the template and make it available in TruCare, click **Submit**.  
To preview the letter template, click **Preview Template**.

## Create User-Defined Tags

To create User Defined Tags

1. Navigate to Core Configuration > Correspondence > User-Defined Tags.  
The User-Defined Tags summary page is displayed.
2. Click Create Tag.  
The Create: User Defined Tags page is displayed.
3. Enter the required information in the following fields:
  - Name
  - License
  - Type
  - Location value can be specified
4. Click Submit.  
A User Defined Tag has been successfully created message is displayed.




### Note

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## View User-Defined Tags

To view User Defined Tags


1. Navigate to Core Configuration > Correspondence > User-Defined Tags.  
The User-Defined Tags summary page is displayed.
2. In the Actions column, click  > View.
3. The User Defined Tags screen displays the following fields:
  - Name
  - License
  - Type
  - Location value can be specified
  - Disable

**Note**

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.


## Edit User-Defined Tags

To edit User-Defined Tags

1. Navigate to Core Configuration > Correspondence > User-Defined Tags.  
The User-Defined Tags summary page is displayed.
2. In the Actions column, click  > Edit.
3. Update the required information and click Submit.

## Enable or Disable User-Defined Tags

To Enable or disable a User-Defined Tag

1. Navigate to Core Configuration > Correspondence > User-Defined Tags.  
The User-Defined Tags summary page is displayed.
2. In the Actions column, click  > Enable/Disable.  
A Enable/Disable confirmation message is displayed.
3. Click Yes.  
The status column displays a Enabled/Disabled status accordingly.

## Library documents

You can add documents to the TruCare library.

The library serves as a repository for PDF enclosures that users can select in the **Correspondence** section of TruCare as attachments to letters.

## Create library document

To create library document

1. Navigate to Core Configuration > Correspondence > Library Documents.  
The Library Documents summary screen is displayed.
2. Click Create Library Document  
The CREATE screen is displayed.
3. Enter the required information in the following fields:
  - Document Name
  - Category
  - License Feature
  - AAG

- Insights Care Management
  - Member Portal
  - Analytics
  - Insights Care Management with Business Intelligence and Modeling
  - Provider Portal
  - CM
  - Insights Time Tracking
  - Reporting
  - DM
  - Insights Time Tracking with Business Intelligence and Modeling
  - UM
  - Employer Portal
  - Insights Utilization Management
  - Wellness
  - Generic
  - Insights Utilization Management with Business Intelligence and Modeling
  - HCS
  - Medication Management
  - Description
  - Start Date
  - Expiration Date
4. Click Add Document.  
Browse and add the required document.
  5. Click Submit.

## Edit a library document

You can change the settings for a library document.

1. Navigate to Core Configuration+Correspondence → Library Documents.  
The Library Documents Summary page is displayed.
2. In the **Actions** column, click **Edit** next to the document to edit.
3. Update the required information.
4. Click **Submit**.

## View Library Document

To view a library document

1. Navigate to Core Configuration+Correspondence → Library Documents.  
The Library Documents Summary page is displayed.
2. In the **Actions** column, click **View**.

## Preview Library Document

To preview a Library Document

1. Navigate to Core Configuration+Correspondence → Library Documents.  
The Library Documents Summary page is displayed.
2. In the **Actions** column, click **Preview**.  
A preview pop-up window displays the appropriate library document.

# Distributed Correspondence

TruCare displays this section and its related user interface elements only when your system has distributed correspondence enabled. For details on distributed correspondence and configuration steps, refer to the TruCare Distributed Correspondence Guide. Enable the distributed correspondence options to allow users to connect to an external correspondence system.



## Note

To allow users to view the Correspondence Summary screen—which displays distributed correspondence—you must enable the View and Edit options for the CorrespondenceSummary screen permission. For more information on setting permissions, see Role Management.

## Prerequisites

1. TruCare running on SSL is installed on a single server (client port: 8444, API: 8443) with pre-generated SSL certificates.
2. Data import from e2e-framework is completed (Lock schema + rules to generate letters).
3. TruCare Application Server service is not running.
4. Download the Distributed Correspondence Mock archive from Jenkins: <https://jnks-mstr-prd3.dev.cninc.com/view/TruCare%20Master/view/master/job/Distributed%20Correspondence%20Mock/job/master/>

## Steps to enable Distributed Correspondence

### Unzip Files

1. Unzip distributed-correspondence-mock-master-SNAPSHOT-ssl.zip into a folder (e.g., C:\distributed-correspondence-mock).
2. Unzip distributed-correspondence-mock-master-SNAPSHOT-mock.zip and copy config.properties and distributed-correspondence-mock.war into the same folder

### Edit config.properties

1. Set the path for generated PDFs: pdf.storage.path=C:\CasenetFiles\MockCorrespondence\
2. Set TruCare API base path (SSL): truCare.api.basePath=https://&lt;your-server>;8443/casenet-server/api
3. Enable SSL and set port:

```
mock.ssl.enable=true  
mock.ssl.port=8445
```

4. Ensure truCare.api.user.name is assigned the correct member filter and permissions

### Edit GenerateCertificates.bat

1. Use the existing TruCare certificate (cert.pem) from your TruCare installation, rename it to truCare.cer, and place it in the mock folder.
2. Remove lines related to standalone API certificate generation.
3. Set variables for Apache Tomcat path, machine names, and API URL.
4. Save the file.
5. Download the updated script if needed: [GenerateCertificates\\_Final.bat](#)

### Run GenerateCertificates.bat

1. Run the script in Command Prompt.
2. It should generate:  
Mock.cer

Mock.keystore  
Mock.truststore  
Trucare.cer

3. It will also update cacerts and trucare.keystore in your apache-tomcat\lib folder.

### Edit mockApiSSL.bat

1. Set the certificate path: set CERT\_PATH=C:\distributed-correspondence-mock
2. Update the trustStore and keyStore paths:

```
-Djavax.net.ssl.trustStore=%CERT_PATH%\mock.truststore
-Djavax.net.ssl.keyStore=%CERT_PATH%\mock.keystore
```

3. Save the file.

### Enable Distributed Correspondence in Database

- Run the following SQL commands against the casenet database (replace URLs as needed):

```
-- Enable distributed correspondence
UPDATE casenet.[dbo].[SystemProperty]
SET [property_value] = 'true'
WHERE [property_key] = 'CORRESPONDENCE_DISTRIBUTED_ENABLED';

-- Set Mock URL
UPDATE casenet.dbo.SystemProperty
SET property_value = 'https://<your-server>:8445/mock'
WHERE property_key = 'CORRESPONDENCE_DISTRIBUTED_URL';

-- Set Document URL Base
UPDATE casenet.dbo.SystemProperty
SET property_value = 'https://<your-server>:8445/mock'
WHERE property_key =
'CORRESPONDENCE_DISTRIBUTED_GENERATED_DOC_BASE_URL';
```



#### Note

Use the FQDN and port, not localhost

### Run mockApiSSL.bat

1. Execute the batch file in Command Prompt.
2. Tomcat should start on port 8445 (HTTPS).

### Start TruCare Application Server Service

- Start the TruCare Application Server service.

### Verify Mock and API Access

1. Open a browser and go to https://<your-server>:8445/mock/ to verify the mock is running.
2. Ensure you can access the TruCare API from the mock

### Verify Distributed Correspondence in TruCare

- Confirm that distributed correspondence is accessible and functioning in TruCare.

## Rule Summary

### Create a Rule - Distributed Correspondence

To Create a Rule

1. Navigate to Core Configuration > Distributed Correspondence > Rule Summary.  
The Rule Summary page is displayed.
2. Click Create Rule.
3. The Create Rule page displays the following options:
  - Rule Name
  - Ready To Export
  - License Feature
  - Event Type
  - Object
4. Click Submit.

**Note**

If you click Cancel, the system displays a confirmation message. Click Yes to discard the entry.


## View Rule Summary - Distributed Correspondence

To view Rule Summary

1. Navigate to Core Configuration > Distributed Correspondence > Rule Summary.  
The Rules summary page is displayed.
2. Click the FILTER BUTTON to filter by License Feature or Event Type.


**Note**

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

3. In the Actions column, Click  > View.  
The View Rule Summary page is displayed.


## Edit Rule Summary - Distributed Correspondence

To Edit Rule Summary

1. Navigate to Core Configuration > Distributed Correspondence > Rule Summary.
2. In the Actions column, Click  > Edit.
3. Update the required information and click Submit.

## Enable or disable Rule Summary - Distributed Correspondence

To Enable or disable Rule Summary

1. Navigate to Core Configuration > Distributed Correspondence > Rule Summary.  
The Rules summary page is displayed.
2. In the Actions column, click  > Disable.  
A Disable Rule confirmation message is displayed.
3. Click Yes.

## Download Rules - Distributed Correspondence

To Download Rules

1. Navigate to Core Configuration > Distributed Correspondence > Rule Summary.  
The Rules summary page is displayed.


2. Click Download Rules.
3. Select the location to save the file.
4. Click Save

**Note**

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## Remove Rule Summary - Distributed Correspondence

To remove Rule Summary

1. Navigate to Core Configuration > Distributed Correspondence > Rule Summary.  
The Rules summary page is displayed.
2. In the Actions column, click  > Remove.  
A Remove Rule confirmation message is displayed.
3. Click Yes.

## Product features

You can create and edit product features using the feature editor. You can also create and edit feature services.

### Add Product Feature

To Add Product Feature

1. Navigate to Core Configuration > Correspondence > Rule Summary.  
The Rule Summary page is displayed.
2. Click Create Rule.
3. Enter the required information in the following fields:
  - Rule Name
  - Disabled
  - Ready to Export
  - License Feature > select UM (Utilization Management).
  - Attribute > select Product Feature
  - Rule Conditions
4. Click Search Product Feature.  
The Add Product Feature to the Rule pane is displayed.
5. Select the appropriate Product Feature.
6. Click Add Selected.
7. Click Add Condition to Rule.
8. In the Rule Output section, click Select Template.  
The Select Letter Template pane is displayed.
9. Select the appropriate template and click Select.
10. Enable the Recipients for Print to Queue or Fax.
11. Select the Task Configuration options:
  - Queue / Assignee
  - Priority
  - Task Due Date Offset in Days
12. In the Print Queue Directory, select the appropriate folder.
13. Click Submit.

A summary has been successfully created message is displayed.

## Add a Feature Service

To Add Feature Service

1. Navigate to Core Configuration > Correspondence > Rule Summary.  
The Rule Summary page is displayed.
2. Click Create Rule.
3. Enter the required information in the following fields:
  - Rule Name
  - Disabled
  - Ready to Export
  - License Feature > select UM (Utilization Management).
  - Attribute > Feature Service
  - Rule Conditions
4. Click Search Feature Service.  
The Add Feature Service to the Rule pane is displayed.
5. Select the appropriate Feature Service.
6. Click Add Selected.
7. Click Add Condition to Rule.
8. In the Rule Output section, click Select Template.  
The Select Letter Template pane is displayed.
9. Select the appropriate template and click Select.
10. Enable the Recipients for Print to Queue or Fax.
11. Select the Task Configuration options:
  - Queue / Assignee
  - Priority
  - Task Due Date Offset in Days
12. In the Print Queue Directory, select the appropriate folder.
13. Click Submit.

A summary has been successfully created message is displayed.

## Manual Letter Recipients

### Define Manual Letter Recipients

To define Manual Letter Recipients

1. Navigate to Core Configuration > Distributed Correspondence > Manual Letter Recipients.  
The Manual Letter Recipients page is displayed.
2. Select a preset from the drop-down.
3. Click Edit
4. Select the appropriate entries from the Recipient List.
5. Select the Required entries.
6. Click Submit.

## Drop-down values

Add values to many TruCare drop-down lists and arrange their order. Configure drop-down lists as mandatory or optional, and set a default value.

To configure a drop-down list for a user-defined field (UDF), first create the drop-down list using the User-Defined Fields functions. For more information, see [Create a user-defined field](#).

# About editing and adding drop-down values

Consider this information when adding or editing drop-down values.



## Note

The Special Needs value set appears as Member Attributes in the TruCare user interface.

## Label and value fields

- When you add a value, the text entered for **Label** appears in TruCare. The text you enter for **Value** is stored in the database. Generally, these values are the same.
- Labels must be unique for all enabled values in a value set. You can have multiple values with the same label as long as only one of the values with that label is currently enabled.
- Values must be unique in a value set.
- The following special characters are supported in Service Type field values:

Character name	Character
asterisk	*
forward slash	/
hyphen	-
parenthesis, left and right	()
space	
underscore	_

## Relationships between value sets

- When a value set is used for multiple drop-down lists on multiple screens, any changes made to the value set affects all of the drop-down lists that use it. For example, if you add a new value to the set, that value is available in every instance of that drop-down list.
- Use the Service Provider Specialty and the Provider Specialty value sets to configure the values in the **Specialty** drop-down list in the **Provider Search** screen in TruCare.

## Relationships between value sets and BHP nodes

- When adding a new **Service Type** drop-down value, you must also configure the availability of the service type in the BHP node. Click Line of Business → Customer Setup. Then select the node you want to configure and select **UM** from the **License Feature** list. Use the **Service Type Configurations** tab to configure the availability of the service type.
- If you disable a service-level value:
  - The system displays a confirmation message to remove the service level from all related programs and BHP nodes.
  - The list of affected programs appears at the top of the screen.
  - After you click **Submit**, the service level value is removed from all related programs and BHP nodes where it is used.

## Disable behavior

- Disabled values are not displayed in the drop-down list unless the value was selected in TruCare prior to being disabled. In this case, **(Disabled)** appears after the value until the user selects a new value and refreshes the screen.
- Typically, when a user selects Other in a drop-down list a text field displays where the user can enter a value. If you disable the out-of-the-box Other value when configuring a value set, the associated text field does not display.


- If you are using a backward-compatible API, do not disable the option value **Other** for **Due Date Change Reason**.

## Appearance and order

You can configure the order that the UDFs appear on the screen in TruCare. UDFs appear next to each other across the screen. The screens can fit four UDFs next to each other before starting a new line of fields. Keep this in mind if you want certain UDFs to appear next to each other.

## Add drop-down values

To Add drop-down values

1. Navigate to Core Configuration > Drop-Down values.  
The Drop-Down values summary screen is displayed.
2. Navigate to the required line item and In the Actions column, click  > Edit.  
The Edit Configuration Field screen is displayed.
3. Add the required information and click Add New Row.  
Add Field Value pane is displayed.
4. Enter label and value in the respective fields.
5. Click + if you want to add more field values
6. Click Submit.  
The added value is listed in the Field Label section.




### Note

Click Sort Alphabetically to sort the field values.

7. Click Submit.



## View drop-down values

To view drop-down values

1. Navigate to Core Configuration > Drop-Down values.  
The Drop-Down values summary screen is displayed.
2. In the Actions column, click  > View.  
The View Dropdown Configuration Field screen is displayed.
3. You can choose Edit or click Close to return to the Drop-Down values summary screen.

## Edit drop-down values

To Edit drop-down values

1. Navigate to Core Configuration > Drop-Down values.  
The Drop-Down values summary screen is displayed.
2. In the Actions column, click  > Edit.  
The Edit Configuration Field screen is displayed.
3. In the Actions column of the Field Label section, click  > Edit.  
The Edit Field value pane is displayed.
4. The following are the fields displayed in the Edit Configuration Filed screen.
  - Screen
  - Screen Section
  - Field Name

- Value Set Name
- Default Value
- Mandatory
- Ready to Export
- Field Label:

5. **<step>**

In Field Label:

- a. Click Sort Alphabetically to sort the field labels in alphabetical order.



**Note**

If you click Cancel, the system displays a confirmation message. Click Yes to discard the sort.

- b. Click Add New Row.  
The Add Field value pane is displayed.
- c. Enter the required information and click Submit.



**Note**

If you click Cancel, the system displays a confirmation message. Click Yes to discard the entry.

**</step>**



Update the required information and click Submit.

The Edit Configuration Field page is displayed.

6. Click Submit.

## Enable or Disable drop-down values

To Enable or Disable drop-down values

1. Navigate to Core Configuration > Drop-Down values.  
The Drop-Down values summary page is displayed.
2. In the Actions column, click  > Edit.  
The Edit Configuration Field page is displayed.
3. In the Actions column of the Field Label section, click  > Disable or Enable.  
The Disable or Enable confirmation message is displayed.
4. Click Yes
5. Click Submit.

A Field Value Successfully Submitted message is displayed.

## Import and export drop-down values

You can Import and export drop-down list values using CSV files.

You can configure drop-down lists in two ways:

- Add values, change their order, and enable or disable values.
- Specify a default value and determine whether the field is mandatory.

Perform these operations in TruCare Admin using the Edit Values and Configure Fields actions. Alternatively, export the current configuration using CSV files, make the necessary changes, and upload the files in TruCare Admin. Using a CSV file allows you to apply multiple changes at once instead of modifying individual fields.

Edit Values and Configure Fields each have their own CSV file. Import drop-down values during the integration or implementation phase to transfer information from a source system into the golden configuration. Avoid using this process between environments, as it can cause unique and foreign key issues in the database during the standard IMEX process.

The IMEX process remains the only supported method for transferring configurations from Golden Configuration to target environments. The exported file serves as a record of your changes and provides a useful starting point for future updates.

## Export drop-down values to CSV

To export Drop-Down values from CSV file

1. Click Core Configuration → Drop-Down values.  
The Drop-Down values summary page is displayed.
2. Click Export CSV Data.  
The Export Files pane is displayed.
3. Click Download on the Option Value Data or Screen Configuration Data



### Note

The downloaded file is in CSV format.

4. Select an appropriate location and click Save.
5. The exported CSV files include the following information:
  - a. The Option Value Data csv file includes the following columns:
    - OptionValueSet
    - OptionLabel
    - OptionValue
    - Enabled
  - b. The Screen Configuration Data csv file includes the following columns:
    - ScreenName
    - SectionName
    - OptionValueSet
    - DefaultValue
    - Required

## Import drop-down values from a CSV file

To Import Drop-Down values from CSV file

1. Click Core Configuration → Drop-Down values.  
The Drop-Down values summary page is displayed.
2. Click Import CSV Data.  
The Import Files pane is displayed.
3. Click to upload on the Option Value Data file or Screen Configuration Data file



### Note

The upload file must be in CSV format.

The upload file size must be in accordance with the file size limits set in System Management > Data Management > Upload Management.

4. Click Submit.

**Note**

An "Error Importing Configuration" message is displayed if the imported CSV file contains any of the following errors:

- Duplicate values
- Invalid number of fields

An Import Successful File(s) message is displayed.

5. Click OK.

## User-defined fields

Create your own fields, called user-defined fields (UDFs), and add them to sections of several TruCare screens. TruCare places UDFs at the bottom of the specified screen section, following the system-supplied fields. You can choose from various field formats, including date, drop-down list, numeric, or string.

After creating a UDF, users can enter data manually or receive it from a feed. You can also use UDFs from certain screens as tags when creating letter templates. For a list of screens and their sections where UDFs can appear, see [User-defined fields](#).

The table in [Notes on date and numeric data types \[183\]](#) shows the TruCare screens that can contain UDFs and indicates if they are available as correspondence tags.

**Note**

Select fields as correspondence tags without using spaces in their names when creating them. When you insert these tags into correspondence, the system adds quotation marks to ensure they function correctly in the correspondence feature.

You can add UDFs to the screens and sections shown in the table.

License	Screen	Screen Section
AAG	AAG Complete Screen	AAG Detail
		AAG Header
		Complete AAG
	AAG Detail Screen	AAG Detail
		AAG Header
		AAG Request for Information
		Complete AAG
	AAG Notification Screen	AAG Detail
		AAG Header
		AAG Requestor Information
	AAG Outcome Screen	AAG Detail
		AAG Header
	AAG Request Screen	AAG Detail
		AAG Header
		AAG Request for Information
	AAG Review Screen	AAG Detail
		AAG Header
		AAG Review
Authorization Appeals	Appeal Detail	Detail

License	Screen	Screen Section
	Appeal Outcome Screen	Appeal Detail
	Appeal Request Screen	Appeal
		Appeal Dates
		Requestor Information
		Appeal Detail
Core		Appeal Review
		Appeal
	UM Notification	Appeal
	Birth Event Screen	Birth Event Field set
	Demographics Screen	General Information
		Member Detail
	Diagnosis Screen	Diagnosis
	Medicaid Coverage Plan Detail	General Information
		General Information
	Medication Screen	Medication Section
	Member Location Screen	Member Location
	Member Privacy	Member Privacy UDF Section
	Personal Contact Screen	Contact Name
	View Facility Provider	Facility Provider
		Location
	View Individual Provider	Individual Provider
		Location
	Regimen Review Summary	Dosage Section
CM	Case Closure Screen	Case Closure
	Case Detail	Case View Details
	Case Edit Screen	Case Edit
	Case Reopen Screen	Case Reopen
	Case Add Screen	Case Add
	Further Referral Evaluation Screen	Referral Determination
		Referral Source Information
	Referral Decision Screen	Referral Determination
		Referral Source Information
HCS	HCS Enrollment Close Reopen Screen	Enrollment Closure Section
		Enrollment Reopen Section
	HCS Enrollment Screen	Enrollment Details Section
		Enrollment Section
	HCS Enrollment Void Screen	Enrollment Void Section

License	Screen	Screen Section
UM	Member Centered Plan Screen	Approach Section
		Outcome Section
		default
	Clinical Review Determination	Clinical Review Section
		Advisor Review Section
		Clinical Review Section
	Inpatient Authorization Request	Determination Section
		Authorization
		Line Item
		Rx Line Item
		Requesting Provider
		SP Line Item
		Servicing Facility
	Rx Authorization Request	Rx Authorization
		Rx Line Item
		Rx Requesting Provider
	Service Procedure Authorization Request	SP Authorization
		SP Line Item
		SP Requesting Provider
	Service Request Screen	default
	Source Notification Screen	Referral Source Information
	Advisor Review	Advisor Review Section
		Clinical Review Section

## Notes on date and numeric data types

Keep this information in mind when configuring UDFs.



### Note

- If you configure a date data type to send information through a data feed, the XML file must have the date formatted as YYYY-MM-DD (4-digit year, 2-digit month, and 2-digit day). Any other format causes an error.
- A numeric data type is defined as an integer. If you configure a numeric data type and send information through a data feed, any leading zeros are truncated. For example, If you send 000102, TruCare stores the value as 102.
- If leading zeros are required for the value sent, set the UDF field to a string. Then the data is saved exactly as it is sent.

Table 24. Correspondence Tags by Screen

Screen	Correspondence Tag
Advisor Review	
Birth Event Screen	
Clinical Review	
Demographics Screen	✓

Screen	Correspondence Tag
Determination	
Diagnosis Screen	
HCS Close/Reopen Screen	
HCS Enrollment Screen	
HCS Enrollment Void Screen	
Inpatient Authorization Detail	✓
Inpatient Authorization Request	For Authorization, Requesting Provider, and Servicing Facility
Medicaid Coverage Plan Detail	
Medicare Coverage Plan Detail	
Medication Screen	
Member Location Screen	
Personal Contact Screen	
Rx Authorization Detail	For Requesting Provider and Servicing Facility
Rx Authorization Request	For Rx Authorization and Rx Requesting Provider
Referral Decision Screen	
Referral Screen	
Service Procedure Authorization Detail	For Requesting Provider and SP Auth
Service Procedure Authorization Request	For SP Authorization and SP Requesting Provider
View Facility Provider	
View Individual Provider	



### Note

After you have created a user-defined field, it can appear on multiple screens. If a value is entered on one of the screens, the same information appears on the other screens where the field is used.

These screens support searchable UDFs.

**Table 25. Searchable UDFs by Screen**

Screen	Browsers Supporting Searchable UDFs
Demographics Screen	Member; Tasks/Queues
Medicaid Coverage Plan Detail	Member; Tasks/Queues
Medicare Coverage Plan Detail	Member; Tasks/Queues
View Facility Provider	Provider; Tasks/Queues
View Individual Provider	Provider; Tasks/Queues

## View UDF Summary

To view UDF summary

1. Navigate to Core Configuration > User Defined Field.
2. The UDF summary screen includes the following options:
  - Import User Defined Field
  - Export User Defined Field
  - Edit UDF Screen Ordering


- Create User Defined Field buttons.
3. The UDF summary screen displays the following options:
    - Screen
    - Screen Section
    - Field Label
    - Type
    - Object
    - Field ID
    - Status
    - Ready to Export
    - Action

**Note**

You can change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## View UDF Details

To view UDF details

1. Navigate to Core Configuration > User Defined Field.
2. In the Action column, click  > View.
3. The UDF details screen displays the following options:
  - Field Label
  - Screen
  - Screen Section
  - Editable?
  - Required?
  - Ready To Export
  - Domain Object
4. Click close to return to the User Defined Field Summary screen.

## Import User Defined Fields

To Import User Defined Fields to CSV file

1. Click Core Configuration → User Defined Fields.
2. Click Import User Defined Fields.  
The Import Files pane is displayed.
3. You can click Click to Upload the User Defiled Files: Data File or User Defined Files: Ordering File.

**Note**

The upload file must be in CSV format.

4. Click Submit.

**Note**

An "Error Importing Configuration" message if the imported CSV file contains any of the following errors:

- Duplicate values
- Invalid number of fields

An Import Successful File(s) message is displayed.

5. Click OK.

## Export User Defined Fields

To Export User Defined Fields to CSV file

1. Click Core Configuration → User Defined Fields.
2. Click Export User Defined Fields.

The Export Files pane is displayed.

3. You can download the User Defined Files: Data File or User Defined Files: Ordering File by clicking Download in the respective section..

**Note**

The downloaded file is in CSV format.

4. Select an appropriate location and click Save.

## Edit UDF Screen Ordering

To edit UDF Screen Ordering

1. Navigate to Core Configuration > User Defined Field.
2. Click Edit UDF Screen Ordering.

The Edit UDF Screen Ordering pane is displayed.

3. Select the appropriate Screen and Screen Selection.

The User Defined Fields Order List is displayed.

4. Drag and rearrange the UDF screens as required.
5. Click Submit.

## Create User Defined Fields

If you choose Drop-Down as the display type, define the drop-down values for the user-defined field (UDF). After you create the list, you can set mandatory and default values for drop-down UDFs.

To create User Defined Fields

1. Navigate to Core Configuration > User-Defined Fields.
2. Click Create User Defined Fields.

The Create: User Defined Fields screen is displayed.

3. Enter the required information in the following fields:

- Field Label
- Screen
- Screen Section

4. Click Add Field Name.

The Add Field Name pane is displayed.

5. Enter the required information in the following fields:
  - Field Name
  - Field Source
  - Display Type
  - Correspondence Tag
6. Click Submit.  
The Create: User Defined Files screen is displayed.
7. Click Submit.  
The User Defined Fields summary screen is displayed.

## Enable or Disable a UDF

Hide UDFs on their configured screens while still updating them through a data feed if they are associated with one. The Do not Display feature does not affect the UDF's searchability.

If configured as searchable for member/provider or tasks/queues searches, users can still search for UDF values using the Advanced Criteria search options and selecting UDF from the list, even if the UDF is hidden.

To enable or disable a UDF

1. Navigate to Core Configuration → User-Defined Fields.  
The UDF summary screen is displayed.
2. In the Action column, click ⋮ > Disable or Enable.  
The status of the UDF will be updated to disabled or enabled accordingly.

## Edit User Defined Fields

To edit a User Defined Field

1. Navigate to Core Configuration > User Defined Field.
2. In the Action column, click ⋮ > Edit.  
The Edit: User Defined Fields screen is displayed.
3. Update the required information.
4. In the Actions column of the Domain Object section, click EDIT.  
The Edit Field pane is displayed.
5. Update the required information and click Submit.  
The screen returns to the Edit User-Defined Field page.
6. Click Submit to save the changes.

## Key Metrics

You can add key metrics to TruCare to measure various member statistics, often recorded over time to assess and monitor member health and quality of care.

The following fields are editable when you create a key metric.

## License Feature

Key metrics are available in TruCare according to the license features and programs configured for the member's BHP.

Select the appropriate license feature for the key metric.

- **Program** — This field appears when CM, DM, HCS, or UM is selected. Select the relevant program.

## Key Metric Name

Enter the name of the key metric.

## Key Metric ID

Enter a unique alphanumeric value. Do not use apostrophes (') or spaces.

## Description

Enter the description of the key metric.

## Key Metric Grouping

To select a grouping, refer to [Configure the key metric grouping \[190\]](#).

## Age Range

Identify the age range for which this key metric is available or clear the check box if age does not apply. This option is enabled by default.

## Gender

This option is enabled by default.

For information on configuring genders, refer to [Configure the available genders \[190\]](#).

## HEDIS Measure

If the key metric is used as a HEDIS measure, select the check box. This option is enabled by default.

## Comments

When enabled, this allows the user to add comments when they record the key metric value in TruCare. This option is enabled by default.

## Barrier to Compliance

When enabled, this allows the configuration of any possible barriers to compliance. For information on configuring the barriers to compliance, refer to the [Configure the barrier to compliance options \[190\]](#). This option is enabled by default.

## Source

When selected, this allows you to configure the source options of the key metric procedure. This option is enabled by default.

## Key Metric Template Type

For information on configuring the type, refer to [Configure the key metric type \[191\]](#).

## Ready To Export

Select this option to mark the key metric as ready to be exported from TruCare Admin and then imported to TruCare. A check mark appears in the **RTE** column in the summary grid for key metrics that have the **Ready To Export** check box selected. See the [TruCare Import Export guide](#) for more information about export/import processes.

## Create a Key Metric Definition

To create a Key Metric Definition


1. Navigate to Core Configuration > Key Metrics.

2. Click Create Key Metric Definition.
3. Enter the required information.
4. Click Submit.

A Key Metric Name has been successfully created message is displayed.


## Edit a Key Metric Definition

To edit a Key Metric Definition

1. Navigate to Core Configuration > Key Metrics.
2. In the Actions column, click  > Edit.  
The edit key metric page is displayed.
3. To edit the categories, scroll to the Key Metric Template Type section.
4. Click Edit on the appropriate Key Metric Template Type.  
The Select Option pane is displayed.
5. Select or deselect the appropriate options and click Submit.
6. Update the required information on the edit key metric page and click Submit.  
A line item is successfully updated message is displayed.

## Copy a Key Metric Definition

To copy a Key Metric Definition

1. Navigate to Core Configuration > Key Metrics.
2. In the Actions column, click  > copy.  
The copy key metric page is displayed.
3. Update the required information on the copy key metric page and click Submit.  
A key metric has been successfully created message is displayed.

## Enable or Disable Key Metric


To enable or disable Key Metric definition

1. Navigate to Core Configuration > Key Metrics.  
The Key Metrics Library summary page is displayed.
2. The Key Metrics Library Summary page displays the following options:
  - Key Metric Name
  - Key Metric ID
  - Key Metric Template Type
  - Source - Status
  - Ready To Export
  - Actions



### Note

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

3. In the Actions column, click  > Disabled / Enable accordingly.  
The status of the Key Metric will be updated to Inactive or Active respectively.

## Key Metric Configurations

## Configure the key metric grouping

You can edit the key metric grouping when creating and copying a key metric. The grouping is used as one of the search criteria in TruCare.

1. Click Clinical Configuration → Key Metrics.
2. Click **Create New Key Metric**. Or, in the **Action** column of a key metric you want to copy as the basis for your new key metric, click **Copy**.
3. Click **Edit** next to **Key Metric Grouping**.
4. Select the check box next to the grouping you want to add. To remove a grouping, clear the check box next to the grouping.
5. To add the selected groupings, click **Submit**.
6. Complete editing the rest of the key metric as needed.
7. Click **Submit**.

## Configure the available genders

You can configure the gender to allow the key metric to be available for all genders or a specific gender. You can configure this when creating a key metric and copying a key metric.

1. Click Clinical Configuration → Key Metrics.
2. Click **Create New Key Metric**. Or, in the **Action** column of a key metric you want to copy as the basis for your new key metric, click **Copy**.
3. To make the key metric available to specific genders, select the **Gender** check box. This is enabled by default.
4. To configure the specific genders for the key metric, click **Edit**.
5. In the **Gender Options Select** screen, select the check box next to the genders for which you want to make the key metric available.
6. To add the selected genders, click **Submit**.
7. Complete the rest of the key metric as necessary.
8. Click **Submit**.

## Configure the barrier to compliance options

You can configure the barriers to compliance for a key metric. You can configure them when creating a key metric and copying a key metric.

1. Click Clinical Configuration → Key Metrics.
2. Click **Create New Key Metric**. Or, in the **Action** column of a key metric you want to copy as the basis for your new key metric, click **Copy**.
3. To allow specific barriers to compliance, select the **Barriers To Compliance** check box.
4. To configure the possible barriers to compliance, click **Edit**.
5. In the **Select** column, select the check box for all values to make available for barriers of compliance.
  - To make all of the options available for barriers of compliance, click **Select All**.
  - To select one default value, select the check box in the **Default** column.
  - To remove a barrier to compliance option, clear the check box.
6. To save the selected barriers to compliance, click **Submit**.
7. Complete the rest of the key metric.
8. Click **Submit**.

## Configure the source options

You can configure the sources of a key metric when creating a key metric and copying a key metric.

1. Click Clinical Configuration → Key Metrics.
2. Click **Create New Key Metric**. Or, in the **Action** column of a key metric you want to copy as the basis for your new key metric, click **Copy**.
3. To allow the source of a key metric, select the check box.  
This is enabled by default.
4. To configure the possible source options, click **Edit**.
5. In the **Select** column, select the check box for all of the sources to make available.
  - To make all of the sources available, click **Select All**.
  - To select one default value, select the check box in the **Default** column.
  - To remove a source option, clear the check box.
6. Click **Submit**.
7. Complete the rest of the key metric.
8. Click **Submit**.

## Configure the key metric type

You can configure the key metric type for a key metric. You can configure this when creating a key metric or copying a key metric.

1. Click Clinical Configuration → Key Metrics.
2. Click **Create New Key Metric**. Or, in the **Action** column of a key metric you want to copy as the basis for your new key metric, click **Copy**.
3. From the drop-down list, select a key metric type at the bottom of the screen.
  - **Occurrence** — Choose this option if the key metric is recorded as an occurrence, for example, an immunization.
  - **Single Numeric** — Choose this option if the key metric is recorded as a single number, for example, weight.  
If you choose this option, the screen opens an additional section to allow you to define units, digits, and an optimal range.
  - **Drop-Down** — Choose this option if the key metric is recorded by choosing a value in a drop-down list.
    - If you choose this option, the screen opens an additional section to allow you to define a sub-label and drop-down values.
    - Key metric drop-down values are customizable.
  - **Multiple Numeric** — Choose this option if the key metric is recorded as a multiple numeric value, for example, blood pressure.
  - **Split Numeric** — Choose this option if the key metric is recorded by choosing a split numeric; for example, height which is recorded in feet and inches.
  - **Composite** — Choose this option if the key metric is recorded by choosing a composite.  
If you choose this option, click **Add Numeric** to add a numeric and click **Add Drop-Down** to add a drop-down.
4. Based on the selected key metric type, complete the fields.
  - **Optional** — If shown, this is enabled by default.
  - **Sublabel**
  - **Options** — Configure the available options.
  - **Single Unit** — If shown, this is enabled by default.
    - Unit
    - Unit in SI
    - Conversion Factor
    - Digits

- Decimal Places
  - Optimal Range
  - **Unit Group**
    - **Units** — To edit the available units, refer to the related procedure.
    - UnitGroup
    - Digits
    - Decimal Places
    - Optimal Range
5. If available, click **Add Numeric** to add another numeric.
  6. If available, click **Add Drop-Down** to add another drop-down.
  7. Complete the remainder of the key metric.
  8. Click **Submit**.

## Configure the available units

You can configure the available options and units for the selected key metric type. You can configure these options and values when creating and copying a key metric.

You can create a value for the **Key Metric Unit Type** drop-down list that appears on the screen (**KeyMetricScreen**) when you create or edit a key metric. Suppose you select the new unit type for a key metric. You later disable that unit type and add a new one. Even if the enabled and disabled unit types have the same label, they are two different unit types. You must again select the unit type for each key metric where you used it.

1. Click Clinical Configuration → Key Metrics.
2. Click **Create New Key Metric**. Or, in the **Action** column of a key metric you want to copy as the basis for your new key metric, click **Copy**.
3. From the drop-down list, select the key metric type.
4. Click **Edit** next to **Options** or **Units**.
5. Select the check box for **Optimal Options** or the default value in the left column.  
If the **Default** column is present, you must select one default value.
6. Select the check boxes in the **Select** column to indicate the available options.
7. Click **Submit**.
8. Complete the rest of the key metric.
9. Click **Submit**.

## Cost Savings Events

Configure cost savings event options to align with your business needs. Enable or disable cost savings for a specific member population (BHP) by navigating to Differential Care Management → Customer Setup → Generic (license feature) → Cost Savings.

## View Cost Savings Events

To view Cost Savings Events

1. Navigate to Core Configuration > Cost Savings Events  
The Cost Savings Events summary page is displayed.
2. In the Actions column, click > View.
3. In the appropriate Avoidance of Potential ER Visit category, click View.

You may choose to edit the appropriate cost savings event or click cancel to return to the cost saving summary page.

## Edit Cost Savings Events

Configure cost savings events by specifying the savings type and other options, such as whether the field is mandatory. To allow users to access this feature, assign the following permissions to the associated role:

- Screen Permissions → Generic, select Member Cost Savings Summary.
- Non-Screen Permissions → Generic, select Generic Cost Savings.

Optionally, assign the following permissions if the user needs access to CM and UM cost savings features:

- Non-Screen Permissions → CM, select CM Cost Savings.
- Non-Screen Permissions → UM, select UM Cost Savings.

To edit Cost Savings Events

1. Navigate to Core Configuration > Cost Savings Events  
The Cost Savings Events summary page is displayed.
2. In the Actions column, click > Edit.
3. Select the appropriate option in the Copy From Savings Type drop-down list.



### Note

Savings Category and Unit Type are required and you cannot modify them.

4. In the appropriate Avoidance of Potential ER Visit category, click Edit.  
The Cost Savings Options pane is displayed.
5. Select or deselect the appropriate options and click Submit.



### Note

If the **Display** check box is selected for **Finalize**, when the box is selected in TruCare, the cost savings event is considered ready for reporting and you can no longer edit it.

The Edit Cost Savings page is displayed.

6. Click Submit.  
A Successfully Saved message is displayed.

## Product features

You can create and edit product features using the feature editor. You can also create and edit feature services.

## Product Feature

### Create a Product Feature

To create a Product Feature



### Note

Once you submit a product feature, the system prevents you from removing its associated feature service.

1. Navigate to Core Configuration > Product Features.
2. Click Create New Product Feature.

3. Enter the appropriate information and click Submit.

The following fields are editable when you create a Product Feature:

- **Product Feature Name**— The name of the product feature that appears in TruCare. This field is editable.
- **Product Feature ID** — Enter a unique alphanumeric value. Do not use apostrophes (') or spaces.
- **Product Feature Type** — From the drop-down list, select one of:
  - Behavioral
  - Medical
  - Both (if the product feature spans both Behavioral and Medical types)
  - Neither (if the product feature does not apply to either the Behavioral or Medical type).
- **License Features** — Select all license features that are applicable. The license features available are restricted to the ones that are part of your TruCare license and are allowed to be part of a product feature.
- **Special Instructions URL** — If you include a URL of an outside network location, the address must include the "HTTP://" portion of the URL. If the URL is a network location, include the full network path. Attachments on network locations are supported.
- **Special Instructions** — Enter, format, and preview any special instructions in the field.
- **Disabled** — This check box is disabled until you submit the product feature.
- **Ready To Export** — Select this option to mark the product feature as ready to be exported from TruCare Admin and then imported to TruCare. A check mark appears in the **RTE** column in the summary grid for product features that have the **Ready To Export** check box selected. See the [TruCare Import Export guide](#) for more information about export/import processes.

## View Product Feature

To view Product Feature list

1. Navigate to Core Configuration > Product Features.
2. Click the Product Feature Library.

The Product Feature summary page is displayed.



### Note

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## Add Product Feature

To Add Product Feature

1. Navigate to Core Configuration > Correspondence > Rule Summary.


The Rule Summary page is displayed.

2. Click Create Rule.
3. Enter the required information in the following fields:
  - Rule Name
  - Disabled
  - Ready to Export
  - License Feature > select UM (Utilization Management).
  - Attribute > select Product Feature
  - Rule Conditions

4. Click Search Product Feature.  
The Add Product Feature to the Rule pane is displayed.
5. Select the appropriate Product Feature.
6. Click Add Selected.
7. Click Add Condition to Rule.
8. In the Rule Output section, click Select Template.  
The Select Letter Template pane is displayed.
9. Select the appropriate template and click Select.
10. Enable the Recipients for Print to Queue or Fax.
11. Select the Task Configuration options:
  - Queue / Assignee
  - Priority
  - Task Due Date Offset in Days
12. In the Print Queue Directory, select the appropriate folder.
13. Click Submit.  
A summary has been successfully created message is displayed.


## Copy a Product Feature

To copy a Product Feature

1. Navigate to Core Configuration > Product Features.  
The Product Features summary page is displayed.
2. In the Actions column, click  > Copy.  
The Product Features page is displayed.
3. Update the required information and click Submit.  
A Product Features updated Successfully message is displayed.

## Edit a Product Feature

To edit a Product Feature

1. Navigate to Core Configuration > Product Features.
2. In the Actions column, click  > Edit.  
The Edit Product Features page is displayed.
3. Update the required information and click Submit.

## Feature Service

### Create a Feature Service

To create a Feature Service



#### Note

Enabling the ready to export option for a product feature also marks its linked feature services as ready to export.

1. Navigate to Core Configuration > Feature Service.
2. Click Create Feature Service.
3. Enter the appropriate information and click Submit.  
The following fields are editable when you create a Feature Service:
  - **Feature Service Name** — Enter a name for the feature service.

- **Feature Service ID** — Enter a unique alphanumeric value. Do not use apostrophes (') or spaces.
- **License Feature** — Select the appropriate license feature for the feature service.
- **Special Instructions URL** — Enter the URL of the special instructions. If you include a URL of an outside network location, the address must include the "HTTP://" portion of the URL. If the URL is a network location, include the full network path. Attachments on network locations are supported.
- **Special Instructions** — Enter, format, preview any special instructions in the field.
- **Disabled** — This check box is disabled until you submit the Feature Service.
- **Ready To Export** — Select this option to mark the feature service as ready to be exported from TruCare Admin and then imported to TruCare. A check mark appears in the **RTE** column in the summary grid for feature services that have the **Ready To Export** check box selected. See the [TruCare Import Export guide](#) for more information about export/import processes.

## View Feature Service

To View Feature Service

1. Navigate to Core Configuration > Product Features.
2. Click the Feature Service Library.

The Feature Service summary page is displayed.

## Add a Feature Service

To Add Feature Service

1. Navigate to Core Configuration > Correspondence > Rule Summary.

The Rule Summary page is displayed.

2. Click Create Rule.
3. Enter the required information in the following fields:
  - Rule Name
  - Disabled
  - Ready to Export
  - License Feature > select UM (Utilization Management).
  - Attribute > Feature Service
  - Rule Conditions

4. Click Search Feature Service.

The Add Feature Service to the Rule pane is displayed.

5. Select the appropriate Feature Service.
6. Click Add Selected.
7. Click Add Condition to Rule.
8. In the Rule Output section, click Select Template.
9. Select the appropriate template and click Select.
10. Enable the Recipients for Print to Queue or Fax.
11. Select the Task Configuration options:

- Queue / Assignee
- Priority
- Task Due Date Offset in Days

12. In the Print Queue Directory, select the appropriate folder.

13. Click **Submit**.

A summary has been successfully created message is displayed.

## Edit a Feature Service

To edit a Feature Service

1. Navigate to Core Configuration > Feature Service.

2. In the Actions column, click  > Edit.

The Edit Feature Service page is displayed.

3. Update the required information and click **Submit**.

The **Feature Service Name**, the **Special Instructions URL**, the **Special Instructions**, and the **Disabled** and **Ready To Export** check boxes are all editable. The other fields are read-only. For more information on completing the fields, refer to [Create a feature service](#).



### Note

When you click **Edit**, the **Ready To Export** check box is cleared even if it was previously selected.

## Edit the association of a feature service to a product feature

After you submit a product feature that has feature services, you can edit the association of the feature services.

1. Click Clinical Configuration → Product Features.

2. Click the **Product Feature Library** tab.

3. Search for the product feature you want to edit.

4. Click the feature name of the product feature you want to edit.

5. Click the **Services** tab.

6. You can, optionally:

- Remove the association of a Feature Service: clear the check box in the **Associated** column. Clearing the check box allows you to hide associated services from being processed by TruCare Actions® and the TruCare Business Rules Engine.
- Enable the association of a feature service: select the check box in the **Associated** column. Selecting the check box allows TruCare Actions and the TruCare Business Rules Engine to process the associated feature services.

If the product feature is marked as ready to export, any associated feature services will be marked as ready to export automatically.

7. Click **Submit**.

# Utilization Management

## Authorization Search

Configure columns in the TruCare Authorization Search browser to suit your needs. You may select up to 10 columns to display in the Authorization Search browser.

To edit Authorization Search

1. Navigate to Utilization Management > Authorization Search.
2. Click Edit.



### Note

Ensure to select at least one search column for display.

3. Move the required values between the Available Columns and Columns to Display.



### Note

Enable the line item(s) to display it for users without member access permissions.

4. Click Submit.

An Authorization Search Configuration changed successfully is displayed.

## Determination Status Mapping

Use Determination Status Mapping to assign explanations to each status in the TruCare Add Determination screen.

To access the Add Determination screen in TruCare, select a line item and click Determination. You can assign any of the available explanations to the following statuses: Approved, Partially Approved, Denied, Partially Denied, Void, Pending, Request Withdrawn, and Dismissed.

If you don't assign specific explanations to a status, TruCare displays all available explanations for that status by default. The system pulls available explanations from the drop-down set [238] UM Explanation. When you edit this drop-down list, you change the list of available explanations for each determination status.

While editing the UM Explanation drop-down set affects all screens that use it, changing the status mappings here affects only the Add Determination screen in authorizations.

To edit the Determination Status Mapping

1. Navigate to Utilization Management > Determination Status Mapping.
2. To update a determination, click Edit.

The Edit Determination Settings pane is displayed.



### Note

Use the toggle switch to **Hide Request Withdrawn** from the Determination Status.

3. Select the appropriate determination category.
4. Move the appropriate Explanations and click Submit.

A Determination status mapping changed successfully message is displayed.

## Authorization Settings

Select the fields that are required when completing an authorization.

- **Inpatient Line Item Procedure Code Required**
- **Include Applied Eligibility in Network Status Calculation**
  - When enabled, the network status of a selected provider on the authorization or authorization line item is calculated based on the selected applied eligibility for the primary or corresponding line item.
  - When disabled, the network status is based on the member's relationship to the provider using any of the active eligibilities that the member has on the data of service.

- **Target Admin/Discharge Dates Required**

- **Allow Capturing Address for Authorization Specific Contact**

When selected, the address information (with **Use in correspondence** check box) is visible in TruCare in IP/SP/Rx authorizations in the **Authorization Specific Contact** section for each provider field. This applies to:

- Viewing authorization screen
- IP, SP, Rx, and Comp Authorizations

- **Require Provider Address Capturing**

When you select **Allow Capturing Address for Authorization Specific Contact**, the **Require Provider Address Capturing** check box becomes available.

- When you select the **Require Provider Address Capturing** check box, you can add provider IDs to the table by indicating the ID in the **Require Provider Address Capturing** field.

In TruCare, when **Require Provider Address Capturing** is selected, if the user supplies a Provider ID (or the Provider Name) that is in the table, the user must then also supply the **Authorization Specific Contact** information, as it becomes a required field.

In TruCare, when **Require Provider Address Capturing** is selected and the user supplies a provider ID (or the Provider Name) that is not in the table, the user is not required to supply the **Authorization Specific Contact** information.

By default, **Allow Capturing Address for Authorization Specific Contact** is not selected, therefore the address information is not visible in TruCare.

- **Warn users when total requested days exceed for IP authorization or <num> for IP line item.**
- **Warn users when total requested units exceed <num> for SP authorization or <num> for SP line item.**
- **Warn users when total requested quantities exceed <num> for SR authorization or <num> for SR line item.**

For the above days, units, and quantities:

- The values are the maximum default values.
- A warning message appears when the value specified is reached.
- Voided line items are not part of the calculation.
- SP line items in an IP authorization are not considered as part of the calculation and are not subject to the warnings.
- There is no comparison between the unit types or the procedure or service codes for the SP or SR authorizations; only the sum of all line items are compared.
- Decimals in SR line items are not considered in the calculation.
- For SR, the calculated quantity and recurring pattern are part of the calculation.
- When using API, the maximum value for a single line item on an SP authorization is 999.
- **Allow Usage of Authorization Specific Contact in outbound x217** determines whether authorization-specific contact names and addresses can be used in place of provider names in Outbound 278 (X217) files.

- If selected — If the **Use Authorization Specific Contact for Correspondence** check box is selected for the authorization in TruCare, the authorization-specific contact name and address override the provider name and address for Outbound 278 (X217) files.
- If not selected — The provider name and address are used for Outbound 278 (X217) files, regardless of the **Use Authorization Specific Contact for Correspondence** check box setting on the authorization request in TruCare

To edit Authorization Settings

1. Navigate to Utilization Management > Authorization Settings.
2. Click Edit.
3. The following are the options available in the Authorization Settings page.
  - Details
  - Code Expiration Date Settings
  - Prescreen Settings
  - IP authorization Limits
  - SR Authorization Limits
  - Clinical Criteria
  - Launch Pad via Jump page
  - Provider Affiliation
4. Update the required information and click Submit.

# Medication Management

## Medication Settings

Configure TruCare to require a prescriber when discontinuing a regimen. You can also set up additional features available to organizations that integrate with Medi-Span® and hold a medication management license.

To edit the Medication Settings

1. Navigate to Medication Management > Medication Settings.
2. Click Edit.
3. Update the required information and click Submit.

## Measure definitions

An Administrative user with Edit permissions can create custom measure definitions to be used for medication management. using the Measure Definitions Editor.

### Create a new measure definition

Use these options when creating a new measure definition.

#### Measure Category

- There are three predefined options:
  - PQA (Pharmacy Quality Assurance) PDC (Portion of Days Covered) Measure
  - Recalled Drug Measure
  - High Risk Medication Measure
- The simpleselect maps to the Category field in the Care Opportunities screen in TruCare

#### Measure Name

- The simpleselect maps to the Risk Indicator field in the Care Opportunities screen in TruCare

#### Measure Definition ID

- Must be unique
- Not editable once the measure definition is published

#### Condition

- A free-text field
- Up to 1000 characters

#### Minimum Age

- Can be blank
- Cannot be less than 0

#### Maximum Age

- Can be blank
- Cannot be less than the **Minimum Age**

#### PDC Target Threshold

- A percentage
- Values can be 0 - 100

- Maps to the Acuity/Risk field on the Care Opportunities field

## Allowable Gap Days

- A number
- The maximum number of gap days between refills allowed for the measure year
- When the member incurs a gap in refill, the number of days is deducted from this value

## Measure Start Date

- Mandatory date picker
- Default is 01/01 of the current year
- Can change this date
- Date cannot be after the **Measure End Date**

## Measure End Date

- Date picker
- Default is 12/31 of the current year
- Can change this date
- Date cannot be before the **Measure Start Date**

## Status

- Mandatory Selection
- Three options:
  - **Draft** - All fields can be edited
  - **Published** - Inclusion/Exclusion parameters appear at the bottom of the screen. Can be edited.
  - **Disable** - Published measure is no longer active

## Target Publish Date

- Optional date picker
- Cannot be in the past

## Ready to Export

- Check box

## Included Medications

- Click **Import Included NDC File** and browse for the file containing included NDCs
- An error appears if an NDC is not found when you select **Submit**.

## Excluded Medications

- Click **Import Excluded NDC File** and browse for the file containing excluded NDCs
- An error appears if an NDC is not found when you select **Submit**.

## Measure Exclusion Codes

- Click **Import Measure Exclusion Codes File** and browse for the file containing excluded measure codes
- An error appears if the measure codes are not found when you select **Submit**.

## Member Exclusions

- To select member attributes for exclusion, scroll through the **Available Member Attributes** list, highlight the selected attribute, and click the **left arrow (⇒)** to move the attribute you want excluded to the **Selected Member Attributes** list.

- To deselect member attributes for exclusion, scroll through the **Selected Member Attributes** list, highlight the selected attribute, and click the **right arrow** (⇒) to move the attribute to the **Available Member Attributes** list.

## Create Measure Definitions

To create Measure Definitions

1. Navigate to Medication Management → Measure Definitions.  
The Measure Definitions summary page is displayed.
2. Click Create Measure Definitions.
3. The Measure Definitions page displays the following options:
  - Measure Category
  - Measure Definition Name
  - Measure Definition
  - Measure Start Date
  - Measure End Date
  - Status



### Note

You may also choose to add or create questions, question groups, set up triggerable actions, create or add notes definitions.

4. Enter the required information and click Submit.



### Note

To generate a draft assessment, click Save.

A confirmation message is displayed.

5. Click Yes.

## View Medication Definition

To view Medication Definition

1. Navigate to Medication Management → Measure Definitions.  
The Measure Definitions summary page is displayed.
2. In the Actions column, click ⋮ > View.
3. Click Close to return to the Medication Definition summary page.



### Note

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.


## Copy Measure Definitions

To Measure Definitions

1. Navigate to Medication Management → Measure Definitions.  
The Measure Definitions summary page is displayed.
2. In the Actions column, click ⋮ > Copy.
3. Update the required information and click Submit.

## Edit Measure Definitions

To Edit Measure Definitions

1. Navigate to Medication Management → Measure Definitions.  
The Measure Definitions summary page is displayed.
2. In the Actions column, click  > Edit.
3. Update the required information and click Submit.

## User permission for Personal Medication List screens

Once TruCare has been installed and the services are operational, the Admin should be able to assign permissions to different users to control the level of access to **Personal Medication List** screens.

The procedure for configuring the **MedicationListScreen** permissions for users:

1. Go to **TruCare Admin**.
2. Select **User Management**.
3. Select **Role Management**.
4. Select **Role Name**.
5. Select **Screen Permissions** and then select **Generic**.
6. Enable the **Create** option in the **MedicationListScreen** for the new **Create Medication List ()** button.



### Caution

If the Admin user does not have **Create** permission, the new **Create Medication List ()** button will not be available to them.

The **View** and **Edit** permissions do not provide any additional access or functionality for the new button.

**Default permissions for Out-of-the-Box (OOB) roles:** The following permissions are automatically configured for both Flat Installs and Upgrades:

Roles	Create	View	Edit
TCAAllPermissionsRole	Yes	Yes	Yes
TCViewAllRole	No	Yes	No
TCGenericViewRole	No	Yes	No
TCGenericEditRole	Yes	Yes	Yes



### Note

**Custom Roles:** For any new custom roles, the User can configure custom access to the **MedicationListScreen** by adjusting the permissions accordingly.

## Generic License correspondence

As a TruCare Admin, follow this procedure to configure a **Generic License** correspondence letter template:

1. Log into TruCare using your credentials.
2. Navigate to the **Correspondence** page and create a new template.
3. Under the **License Feature** for Generic, locate the mandatory field labeled **Screens Available**.

4. Use the multi-select dropdown to choose one or more pages where the letter should be displayed.



### Note

Current options include **Correspondence** and **Personal Medication List**.

If you do not select at least one page, a standard error message appears when you attempt to save or publish the template.

The dropdown values are managed through a Java enum, not the database, and new options can be added over time.

By default, no pages are selected, hence actively select the appropriate pages based on your requirements.

## Managing Generic License correspondence letter

The procedure for managing the **Generic License** correspondence letter templates is provided below:

1. Publish a letter template.

After publishing a letter template, the associated screens cannot be edited. To make any change, copy the letter, create a new template, and void the old template.

2. Copy or copy version of a letter template.

- From the **Correspondence** page in the admin console, click **Copy** or **Copy Version**.
- You are directed to the **Create Template** workflow.
- All details from the copied letter, including **Screens Available**, are pre-filled.
- Modify the details before saving the new letter template.

3. Edit a draft letter template.

If the letter is in draft status, click **Edit** to update most fields, including the **Screens Available** section.

4. Copy a letter from the main table.

- When you click **Copy** from the main list of letters, the system will attempt to copy the latest version by effective date from the associated sub-table.
- If the latest version has a **future effective date**, the system skips it and copy the next valid version (with a current or past effective date).

5. Copy a specific version from the sub-table

- Click **Copy Version** from the sub-table, the system copies the specific version and retains all associated information, including the **Screens Available** data.

## Configuring Generic License Correspondence Letter Templates

The procedure for configuring the **Generic License** correspondence letter templates is provided below:

1. Create a new template.

- When you create a new letter template, ensure you complete all the mandatory steps.

2. Select screens for the letter.

- Select the relevant screens where the letter should appear.
- The selected screens are highlighted in blue. Only the selected screens will display the letter you are configuring.

3. Publish the letter template.



## Note

After publishing, the selected **Screens Available** is sent to the backend to ensure proper configuration.

The screen selection cannot be changed after publishing.

4. Plan for future expansion.
  - Configure additional pages in the future as needed.
5. Understand the existing configuration.
  - All existing letters configured for **Generic License** are at present mapped only to the **Correspondence** page. These letters are not linked to the **Personal Medication List** screen.

## Database field changes in Generic License correspondence

To configure the **Generic License** correspondence letter templates, follow these steps to database fields to accommodate changes:

1. Create a new table named **LetterTemplateVersionScreenPage**.
2. Add the following columns to the table: **letter\_template\_version\_screen\_page\_id**, **letter\_template\_id**, **letter\_template\_version\_id**, and **screen\_page**.
3. Map this new table to both the **LetterTemplate** and **AsposeLetterTemplateVersion** tables to support the required configuration for **Generic License** letters.

## UI changes in the Generic License correspondence

To control the visibility of **Generic License** letter templates in the UI, follow this procedure:

1. When creating a letter template in the admin console, select the specific pages where the template should appear.
2. Ensure the UI only displays the letter templates on the pages selected during configuration. For example, if you assign the **Personal Medication List** letter to the **Personal Medication List** page, it does not appear on the **Correspondence** page, and vice versa.
3. Ensure any additions or removals of templates from specific pages in the admin console are immediately reflected in the UI. Thereby users only see the relevant letter templates on the designated pages.

# User Management

**User Management:** The User Management component includes tools that let users create TruCare users, Admin users, assign user permissions, and set up Teams for use within TruCare.

## Users

### About users

Create a user to enable that user to log in to a TruCare system with the appropriate permissions.

For example, create a TruCare user assigned to the appropriate role groups, member filter groups, and admin groups. Or, create a Provider Portal user if you want the user to have access to ProAuth but not to TruCare.

Before you create a user, create any custom role groups, filter groups, admin groups, and company groups that you want to associate with the user. You can change these associations later or use only predefined groups. However, if you know the groups that you want to create, it is best practice to create them first.

- The Role Group determines the permissions the new user has.
- The Member Filter Group determines the types of members the user has access to.
- An Admin Group gives the user specific permissions in TruCare Admin.
- You can also add the user to a Company Group in your business structure, such as co-workers or business units.

When you assign role groups, make sure that the role groups match the type of user you are creating. For example, if you are creating a Provider Portal user, assign the user to Provider Portal groups such as **TCProviderPortal**.

Information such as the phone number, fax number, and email address are optional. However, keep in mind whether your document templates, which TruCare users use for correspondence, expect this information. If so, it is best practice to include them in the user information.

### Create User

To create a user

1. Navigate to User Management > Users.
2. Click Create User.  
The Create User page is displayed.
3. Enter the required information and click Submit.

A user was successfully created message is displayed.




#### Note

System created Users cannot be disabled.

### View Users

To view Users

1. Navigate to User Management > Users.  
The Users Library summary page is displayed.
2. In the Actions column, click  > View.

The Users page is displayed.




### Note

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## Edit Users

To edit Users

1. Navigate to User Management > Users.
2. In the Actions column of an appropriate user, click  > Edit.




### Note

Only custom data can be disabled; system data cannot be disabled.

3. Update the required information and click Submit.  
A user was updated successfully message is displayed.

## Copy Users


To copy a User

1. Navigate to User Management > Users.
2. In the Actions column of an appropriate user, click  > Copy.
3. Update the required information and click Submit.

A user was updated successfully message is displayed.

## Disable Users

To disable a user

1. Navigate to User Management > Users.
2. In the Actions column, click  > Disable.



### Note

Only custom data can be disabled; system data cannot be disabled.

A Disable User Account confirmation message is displayed.

3. Click Yes.

The status of the user account is updated as Disabled.

## Invalid user name characters in Active Directory

If you are using Active Directory, do not use these characters in user names.

Character	Description
"	double quote
/	forward slash
\	backward slash
[	left square bracket
]	right square bracket
:	colon
;	semicolon

Character	Description
	vertical bar
=	equal sign
,	comma
+	plus sign
*	asterisk
?	question mark
<	less than sign
>	greater than sign

## Creating a TruCare ProAuth user

To create a specialized user who has access only to ProAuth, use specific role groups.

- **Provider Portal Plan Administrator Access** — This permission gives the user access to all portal administrative (configuration) functions of a health plan, which includes portal administration, authorization submission, and viewing authorizations.
- **Provider Portal Authorization Submission Access** — This permission gives the user access to authorization submission, which includes authorization submission and viewing authorizations.
- **Provider Portal Authorization View Access** — This permission gives the user access to view authorizations, which includes viewing authorizations and access to member search.

Users with these permissions do not have access to TruCare or the Business Rules Engine.

You can view ProAuth users' activities on the Audit → Logs by Member screen by selecting **Provider Portal** in the **User Type** drop-down list.

## Roles Group

### Create Roles Group


To create a Roles Group

1. Navigate to User Management > Roles Group.
2. Click Create New Role Group.
3. Enter the required information and click Submit.

A roles group library is created successfully message is displayed.

### View Roles Group

To view Roles Group

1. Navigate to User Management > Roles Group.  
The Roles Group summary page is displayed.
2. In the Actions column, click  > View.  
The Roles Group page is displayed.




#### Note

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

### Edit Roles Group

To edit Roles Group

1. Navigate to User Management > Roles Group.  
The Roles Group summary page is displayed.
2. In the Actions column, click  > Edit.



### Note

Only custom data can be disabled; system data cannot be disabled.

The Edit Roles Group page is displayed.

3. Update the required information and click Submit.




### Note

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## Copy Roles Group

To copy Roles Group

1. Navigate to User Management > Roles Group.  
The Roles Group summary page is displayed.
2. In the Actions column, click  > Copy.  
The Copy Roles Group page is displayed.
3. Update the required information and click Submit.




### Note

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## Disable or Enable Roles Group

To Disable or Enable Roles Group

1. Navigate to User Management > Roles Group.
2. In the Actions column, click  > Disable or Enable.



### Note

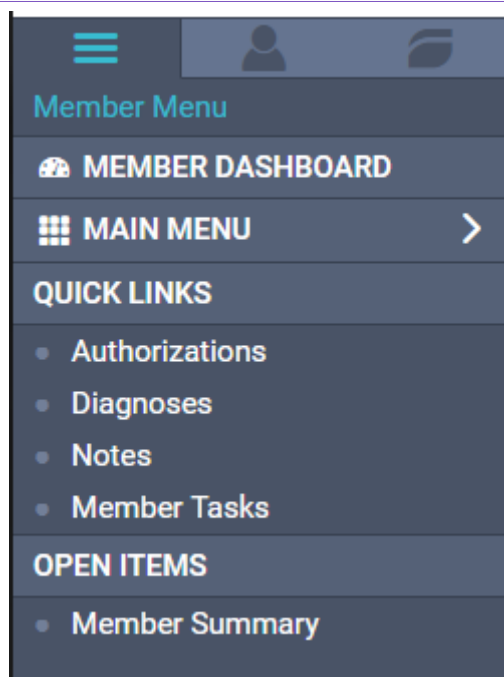
Only custom data can be disabled; system data cannot be disabled.

A confirmation message is displayed.

3. Click Yes.  
The status column is updated accordingly.

## Create quick links for role groups

A quick link brings the user to a particular screen in TruCare, providing easy access to the parts of TruCare that they use frequently.



Set quick links for a role group. On the **Quick Links** tab, users can select quick links only for which their role group has permissions. To enable a disabled quick link on the tab, you must first add the associated permission to the role group.

The user's primary role group is the role that determines the set of quick links the user sees. For users to see quick links, they must have a primary role group assigned. The role group cannot be disabled or obsolete. If a user cannot see quick links, edit the user and assign a primary role group. See [Create a user](#) and [Change user information](#).

Refer to [Quick links and screen permissions \[211\]](#) for the corresponding screen permission for each quick link.

By default, role groups do not have any quick links configured.

1. Click User Management → Role Group Management.
2. Click **Create New Role Group** to create a new role group, or click the **Role Group Name** in the column to edit an existing role group.
3. Add or edit any roles in the **Roles** tab.
4. Click the **Quick Links** tab.
5. Select up to four quick links you want to configure for the role group.  
You can associate up to four quick links with the role group.
6. Click **Submit**.

## Quick links and screen permissions

You can configure quick links for role groups based on the associated screen permissions.

The table contains the available quick links and the screen permissions that you need to use the quick link. At a minimum, you need the permission to view the screen. The member must have the associated feature configured for their BHP node for the quick link to appear.

Quick link	Screen permission
Allergies	Generic > AllergySummary
Assessments	Generic > AssessmentSummary
Authorizations	UM > AuthorizationSummary
Birth Events	Generic > BirthEventSummary
Care Opportunity	Generic > CareOpportunitySummary

Quick link	Screen permission
Care Plans	CM > CarePlanSummary DM > CarePlanSummary
Cases	CM > CaseSummary DM > CaseSummary
Claims	Generic > ClaimsSummary
Contacts	Generic > ContactsSummary
Correspondence	Generic > CorrespondenceSummary
Cost Savings	Generic > CostSavings
Demographics	Generic > DemographicsScreen
Diagnoses	Generic > DiagnosisSummary
Documents	Generic > DocumentManagementSummary
Eligibility and Benefits	Generic > EligibilityBenefitsSummary
HCS Enrollment	HCS > HCSEnrollmentSummaryScreen
Key Metrics	Generic > KeyMetricSummary
Medications	Generic > MedicationsSummary
Privacy Information	Generic > MemberPrivacy
Member Summary	Generic > MemberSummary
Notes	Generic > NotesSummary
Product Features	Generic > ProductFeatureSummary
Programs	Generic > ProgramEnrollmentSummary
Quality Incidents	Generic > QualityIncidentSummary
Quality Measures	Generic > QualityMeasuresScreen
Referrals	Generic > ReferralsSummary
Scheduler	General Permission > SchedulerViewAllUsersCalendars
Tasks	Generic > TaskBrowser

## Quick links and screen permissions

You can configure quick links for role groups based on the associated screen permissions.

The table contains the available quick links and the screen permissions that you need to use the quick link. At a minimum, you need the permission to view the screen. The member must have the associated feature configured for their BHP node for the quick link to appear.

Quick link	Screen permission
Allergies	Generic > AllergySummary
Assessments	Generic > AssessmentSummary
Authorizations	UM > AuthorizationSummary
Birth Events	Generic > BirthEventSummary
Care Opportunity	Generic > CareOpportunitySummary
Care Plans	CM > CarePlanSummary DM > CarePlanSummary
Cases	CM > CaseSummary DM > CaseSummary
Claims	Generic > ClaimsSummary
Contacts	Generic > ContactsSummary

Quick link	Screen permission
Correspondence	Generic > CorrespondenceSummary
Cost Savings	Generic > CostSavings
Demographics	Generic > DemographicsScreen
Diagnoses	Generic > DiagnosisSummary
Documents	Generic > DocumentManagementSummary
Eligibility and Benefits	Generic > EligibilityBenefitsSummary
HCS Enrollment	HCS > HCSEnrollmentSummaryScreen
Key Metrics	Generic > KeyMetricSummary
Medications	Generic > MedicationsSummary
Privacy Information	Generic > MemberPrivacy
Member Summary	Generic > MemberSummary
Notes	Generic > NotesSummary
Product Features	Generic > ProductFeatureSummary
Programs	Generic > ProgramEnrollmentSummary
Quality Incidents	Generic > QualityIncidentSummary
Quality Measures	Generic > QualityMeasuresScreen
Referrals	Generic > ReferralsSummary
Scheduler	General Permission > SchedulerViewAllUsersCalendars
Tasks	Generic > TaskBrowser

## Member dashboards for role groups

You can associate a member dashboard with a role group. Having different information appear on a member dashboard based on the user's role group allows you to show only the information relevant to that type of user.

The role group must be the user's primary role group for the dashboard to take effect.

You can specify two types of information in the member dashboard based on role group:

- The pods that appear and the order in which the pods appear.
- The information that appears in the member header and member details sections of the member dashboard.

When a role group does not have a member dashboard defined, the default member dashboard appears. Specify the default member dashboard in System Management → Global Configuration. See [Global configuration settings \[227\]](#).

## Select member dashboard pods for a role group

Select member dashboard pods for a role group when users in that role group need access to a specific set of pods. The role group must be a user's primary role group for the dashboard to take effect.

If you do not specify this information for a role group, the settings in Global Configuration take effect.

1. Select User Management → Role Group Management.
2. Select the role group whose dashboard pods you want to specify.
3. Select the **Member Dashboard Pods** tab.
4. Select **Edit**.
5. Select **Add definition for this role group**.

6. Select the pods you want to appear in the member dashboard for this role group from the **Available Pods** list and select the right arrow to move them to the **Display Order** list. (FW means the pod spreads across the full width of the TruCare work area.) You can also drag items between the Available Pods list and the Display Order list.  
If you do not select any pods and then you submit, the member dashboard appears blank.
7. Use the up and down arrows to order the pods.  
Before you submit, you can also update the member information by selecting the Member Information tab and selecting **Add definition for this role group**. For details, see [Specify member dashboard member information for a role group \[214\]](#).
8. Select **Submit**.

## Specify member dashboard member information for a role group

For each role group, you can specify the information that appears in the member header and member details areas of the member dashboard. These settings also appear at the BHP level (see [Configure member details](#) for details). The settings that are selected in both areas (here for the role group and at the member's BHP level) (the overlapping settings) will be shown to the user in TruCare.

Select items from the Field Chooser selector to include in either the member header or member details section of the member dashboard.

In addition to the default items listed in the Field Chooser selector, the member header and member details can include UDFs field names and their values as well as links to a summary of documents of the type you select.

- The UDFs available are those added in the eligibility and member domains, by field name. These screens/sections are included:
  - DemographicsScreen in the MemberDetails and GeneralInformation sections
  - MedicareCoveragePlanDetails screen in the GeneralInformation section
  - MedicaidCoveragePlanDeatils screen in the GeneralInformation section
- The member documents you can link to are documents in the Documents summary sorted by the document type you select. The available document types come from the drop-down list **Document Type** in the DocumentManagementSummary screen.

If you do not specify this information for a role group, the settings in Global Configuration take effect.

Configure the information to show in the BHP-Member Details field in Differential Care Management > Customer Setup > license: Generic > Member Details > BHP Field Setup. For example, configure a link that goes to information about the member's plan based on their BHP node. See [Configure member details](#)

To specify member information for a dashboard:

1. Select User Management → Role Group Management.
2. Select the role group whose member information you want to specify.
3. Select the **Member Information** tab.
4. Select **Edit**.
5. Select **Add definition for this role group**.
6. Using the check boxes, select elements that you want to appear in the member header.
7. To make UDFs and links to documents available in the Field Chooser, selector select **Add Member UDFs** or **Add Member Documents**. Select the UDFs or document types, as appropriate, and select **Add**.

**Note**

If a check box is disabled, the UDF or document is already in use in either the member header or member details. If a document type is disabled under the **Technical Configuration** section, "(Disabled)" shows next to the value. You can still select a disabled document type, but the value shows in TruCare only if you enable the value.

8. From the Field Chooser selector, select up to four additional fields to appear in the member header. Select the left arrow to move them to the **Additional Member Header Fields** list.
9. From the field chooser, select the fields you want to appear in the member details. Select the right arrow to move them to the **Member Details Fields** list.
10. Use the up and down arrows to order items in the Member Header and Member Details fields.

Before you submit, you can also update the visible dashboard pods by selecting the Member Dashboard Pods tab and selecting **Add definition for this role group**. For details, see [Select member dashboard pods for a role group \[213\]](#).

11. Select **Submit**.

## Edit a member dashboard associated with a role group

You can revise the pods that appear on a member dashboard for a role group and change the member header and member details information.

1. Select User Management → Role Group Management.
2. Select the role group whose dashboard you want to edit.
3. Select the **Member Dashboard Pods** tab.
4. Select **Edit**.
5. Specify the pods that you want to appear as described in [Select member dashboard pods for a role group \[213\]](#).
6. Select the **Member Information** tab.
7. Edit the member information. See [Specify member dashboard member information for a role group \[214\]](#) for details.
8. Select **Submit**.

## Remove member dashboard information from a role group

If you no longer want a member dashboard to be associated with a role group, you can remove the dashboard definition. You can remove the pods definition, the member information (member header and member details), or both.

After you remove the definition, users in the role group see the default member dashboard. The default member dashboard is defined in System Management → Global Configuration. See [Global configuration \[227\]](#).

1. Select User Management → Role Group Management.
2. Select the role group whose member dashboard configuration you want to remove.
3. Select the Member Dashboard Pods tab.
4. Select **Edit**.
5. To remove the dashboard pods, select **Remove definition from this role group**.
6. Select the Member Information tab.
7. To remove the member header and member details information, select **Remove definition from this role group**.
8. Select **Submit**.

## Select member dashboard pods for a role group

Select member dashboard pods for a role group when users in that role group need access to a specific set of pods. The role group must be a user's primary role group for the dashboard to take effect.

If you do not specify this information for a role group, the settings in Global Configuration take effect.

1. Select User Management → Role Group Management.
2. Select the role group whose dashboard pods you want to specify.
3. Select the **Member Dashboard Pods** tab.
4. Select **Edit**.
5. Select **Add definition for this role group**.
6. Select the pods you want to appear in the member dashboard for this role group from the **Available Pods** list and select the right arrow to move them to the **Display Order** list. (FW means the pod spreads across the full width of the TruCare work area.) You can also drag items between the Available Pods list and the Display Order list.  
If you do not select any pods and then you submit, the member dashboard appears blank.
7. Use the up and down arrows to order the pods.  
Before you submit, you can also update the member information by selecting the Member Information tab and selecting **Add definition for this role group**. For details, see [Specify member dashboard member information for a role group \[214\]](#).
8. Select **Submit**.

## Specify member dashboard member information for a role group

For each role group, you can specify the information that appears in the member header and member details areas of the member dashboard. These settings also appear at the BHP level (see [Configure member details](#) for details). The settings that are selected in both areas (here for the role group and at the member's BHP level) (the overlapping settings) will be shown to the user in TruCare.

Select items from the Field Chooser selector to include in either the member header or member details section of the member dashboard.

In addition to the default items listed in the Field Chooser selector, the member header and member details can include UDFs field names and their values as well as links to a summary of documents of the type you select.

- The UDFs available are those added in the eligibility and member domains, by field name. These screens/sections are included:
  - DemographicsScreen in the MemberDetails and GeneralInformation sections
  - MedicareCoveragePlanDetails screen in the GeneralInformation section
  - MedicaidCoveragePlanDeatils screen in the GeneralInformation section
- The member documents you can link to are documents in the Documents summary sorted by the document type you select. The available document types come from the drop-down list **Document Type** in the DocumentManagementSummary screen.

If you do not specify this information for a role group, the settings in Global Configuration take effect.

Configure the information to show in the BHP-Member Details field in Differential Care Management > Customer Setup > license: Generic > Member Details > BHP Field Setup. For example, configure a link that goes to information about the member's plan based on their BHP node. See [Configure member details](#)

To specify member information for a dashboard:

1. Select User Management → Role Group Management.
2. Select the role group whose member information you want to specify.
3. Select the **Member Information** tab.
4. Select **Edit**.
5. Select **Add definition for this role group**.
6. Using the check boxes, select elements that you want to appear in the member header.
7. To make UDFs and links to documents available in the Field Chooser, selector select **Add Member UDFs** or **Add Member Documents**. Select the UDFs or document types, as appropriate, and select **Add**.



### Note

If a check box is disabled, the UDF or document is already in use in either the member header or member details. If a document type is disabled under the **Technical Configuration** section, "(Disabled)" shows next to the value. You can still select a disabled document type, but the value shows in TruCare only if you enable the value.

8. From the Field Chooser selector, select up to four additional fields to appear in the member header. Select the left arrow to move them to the **Additional Member Header Fields** list.
9. From the field chooser, select the fields you want to appear in the member details. Select the right arrow to move them to the **Member Details Fields** list.
10. Use the up and down arrows to order items in the Member Header and Member Details fields.

Before you submit, you can also update the visible dashboard pods by selecting the Member Dashboard Pods tab and selecting **Add definition for this role group**. For details, see [Select member dashboard pods for a role group \[213\]](#).

11. Select **Submit**.

## Edit a member dashboard associated with a role group

You can revise the pods that appear on a member dashboard for a role group and change the member header and member details information.

1. Select User Management → Role Group Management.
2. Select the role group whose dashboard you want to edit.
3. Select the **Member Dashboard Pods** tab.
4. Select **Edit**.
5. Specify the pods that you want to appear as described in [Select member dashboard pods for a role group \[213\]](#).
6. Select the **Member Information** tab.
7. Edit the member information. See [Specify member dashboard member information for a role group \[214\]](#) for details.
8. Select **Submit**.

## Remove member dashboard information from a role group

If you no longer want a member dashboard to be associated with a role group, you can remove the dashboard definition. You can remove the pods definition, the member information (member header and member details), or both.

After you remove the definition, users in the role group see the default member dashboard. The default member dashboard is defined in System Management → Global Configuration. See [Global configuration \[227\]](#).

1. Select User Management → Role Group Management.
2. Select the role group whose member dashboard configuration you want to remove.
3. Select the Member Dashboard Pods tab.
4. Select **Edit**.
5. To remove the dashboard pods, select **Remove definition from this role group**.
6. Select the Member Information tab.
7. To remove the member header and member details information, select **Remove definition from this role group**.
8. Select **Submit**.

## Create a role group based on an existing group

You can base a new role group on an existing group by copying the existing role group as a starting point for your new role.

After you create the copy, edit the copy to customize the new role group.

1. Click User Management → Role Group Management.
2. Search for the role group you want to copy.
3. Click the role group name that you want to copy.
4. Click **Copy Role Group**.
5. In the role group screen, enter a new role group name and, optionally, a description. The description helps to differentiate the new role group from the source role group.
6. Add roles to and remove roles from the list as needed. Click the plus sign (+) to select the roles you want to add. Click the red **x** next to a role name to remove it from the role group.
7. When the list of roles is complete, click **Submit**.

## Managing roles and role groups for Healthwise

It is crucial for a supervisor to create and manage roles in TruCare Admin to control user access to the Healthwise link in TruCare.

To create a new role and assign it specific permissions for Healthwise, follow these steps:

1. Login to TruCare Admin.
2. Navigate to **User Management > Role Management**.  
The **Role Management** screen allows the supervisor to define and manage user roles in TruCare Admin and TruCare .
3. See topic [Create a role](#) under [Role management](#) in order to create a new role **Access healthwise** with description as **Access healthwise**. Select the **Access Healthwise** permission from the list of **Permission Name** from **General Permission** section and click Submit.

Later, create a new role group and add the above created new role to it or edit an existing role group to include this new role.

See topic [Create a role group](#) under Role group management in order to create a new role group **Access Healthwise Role group** with description as **Access Healthwise Role group**. Select the newly created role name **Access healthwise** from the list of **Role Name** and click Submit.

Also, see topic [Edit a role group](#) under Role group management in order to add the newly created role name **Access healthwise** in this existing role group.

This process of managing roles and role groups helps ensure that roles are correctly assigned within role groups based on their permissions.

# Roles


## Create Roles Library

To create a Roles Library

1. Navigate to User Management > Roles.
2. Click Create Rule.  
The Create Role Management pane is displayed.
3. Enter the Role Name and Description.
4. In the Role Access Configuration, select one of the following configuration:
  - Screen Permissions
  - Non-Screen Permissions
  - General Permissions
  - Portal Permissions
  - TruCare Insights PermissionsThe appropriate Select Permissions pane is displayed.
5. Select the required permissions and click Submit.  
The Create Role Management page is displayed.
6. Click Submit.

## View Roles Library

To view Roles Library

1. Navigate to User Management > Roles.  
The Roles Library summary page is displayed.
2. In the Actions column, click  > View.  
The Roles page is displayed.




### Note

You may change the pagination limit, sort, filter, search, and reset the search for the options mentioned above.

## Edit Roles Library

To edit Roles Library

1. Navigate to User Management > Roles.  
The Roles summary page is displayed.
2. In the Actions column, click  > Edit.



### Note

Only custom data can be disabled; system data cannot be disabled.

The Edit Roles page is displayed.

3. Update the required information and click Submit.

## Copy Roles Library

To copy a Role Library

1. Navigate to User Management > Roles.

The Roles summary page is displayed.


2. In the Actions column, click  > Copy.

The copy Roles page is displayed.

3. Update the required information and click Submit.

## Disable or Enable Roles Library

To Disable or Enable Roles Library

1. Navigate to User Management > Roles.
2. In the Actions column, click  > Disable or Enable.



### Note

Only custom data can be disabled; system data cannot be disabled.

A confirmation message is displayed.

3. Click Yes.

The status column is updated accordingly.

## Teams

To view Teams summary

- Navigate to User Management > Teams.

The Teams summary page is displayed.

## Create a Team

To create a Team

1. Navigate to User Management > Teams.
2. Click Create Team.
3. Enter the appropriate Team Name and click Select Team Users.

The Add Team Users pane is displayed.

Team Configuration settings

- a. In the Team Users tab, click Select Team Users.

The Add Team Users pane is displayed.

- b. Select the appropriate Team Users and click Submit.

A confirmation message is displayed.

- c. Click Yes.

The Team Configuration is updated with the selected Users.

- a. In the BHP Nodes tab, click Select BHP Nodes.

The Add BHP Nodes pane is displayed.

- b. Select the appropriate BHP N and click Submit.

A confirmation message is displayed.

- c. Click Yes.

The Team Configuration is updated with the selected BHP Nodes.

4. To remove a User or BHP Node

- a. Navigate to User Management > Teams.

- b. Click the Teams Users tab.


- c. In the appropriate Actions column, click  > Remove.

A confirmation message is displayed.

- d. Click the BHP Nodes tab.
  - e. In the appropriate Actions column, click Delete.  
A confirmation message is displayed.
  - f. Click Yes.
5. Click Submit.

## View a Team

To view a Team

1. Navigate to User Management > Teams.
2. To view a User or BHP Node, click  > View.  
The User Details or BHP Node Details pane is displayed.

## Edit a Team

To edit a Team

1. Navigate to User Management > Teams.
2. To edit a User or BHP Node, click Edit.



### Note


Only custom data can be disabled; system data cannot be disabled.

The Add User or Add BHP Node pane is displayed.

3. Select or deselect the appropriate Team or BHP Node and click Select.
4. Click Yes.

## Enable or Disable a Team

To Enable or Disable a Team

1. Navigate to User Management > Teams.
2. In the Actions column, click  > Disable.



### Note

Only custom data can be disabled; system data cannot be disabled.

A Disable Team confirmation message is displayed.

3. Click Yes.  
The status of the user account is updated as Disabled.

## Admin Groups

To view Teams summary

- Navigate to User Management > Admin Groups.  
The Admin Groups summary page is displayed.

## Create an Admin Group

To create an Admin Group

1. Navigate to User Management > Admin Group.
2. Click Create Admin Group.
3. Enter the required information and click Submit.  
An Admin group library is created successfully message is displayed.

## Create an admin group based on an existing group

Copy an existing group to use as the basis for a new group.

1. Click User Management → Admin Group Management.
2. If necessary, search for the group you want to use as the basis for your new group.
3. Click the group name.
4. In the permissions screen, click **Copy Admin Group**.  
The permissions screen redisplay with the check boxes enabled.
5. Enter a name for the new admin group and, optionally, a description to help distinguish it from the group you copied from.
6. Select or clear the check boxes for the permissions that you want the new admin group to have.
7. Click **Submit**.

## View an Admin Group

To View an Admin Group

1. Navigate to User Management > Admin Group.
2. In the Actions column, click ⋮ > View.  
The View Team Management page is displayed.
3. Click Close to return to the Admin Group summary page.

## Edit an Admin Group

To Edit an Admin Group

1. Navigate to User Management > Admin Group.
2. In the Actions column, click ⋮ > Edit.
3. In the Admin Permissions section, click Edit.  
The Select Admin permissions pane is displayed.
4. Select the appropriate permissions and click Submit.

## Copy an Admin Group

To Copy an Admin Group

1. Navigate to User Management > Admin Group.
2. In the Actions column, click ⋮ > Copy.  
The Copy Admin Group page is displayed.
3. Update the required information and click Submit.

## Disable an Admin Group

To disable an Admin Group

1. Navigate to User Management > Admin Group.
2. In the Actions column, click ⋮ > Disable.  
A Disable Admin Group confirmation message is displayed.
3. Click Yes.  
The status of the user account is updated as Disabled.

## Company Groups

To view or edit Company Groups

1. Navigate to User Management > Company Groups.
2. Click the appropriate label.  
The appropriate label pane is displayed.
3. You may view the following company group information:
  - Address line 1
  - Address line 2
  - Address line 3
  - City
  - Province
  - Postal Code
4. Click Edit to update the required information.
5. Click Submit.

## View or Edit a Company Group

To view or edit Company Groups

1. Navigate to User Management > Company Groups.
2. Click the appropriate label.  
The appropriate label pane is displayed.
3. You may view the following company group information:
  - Address line 1
  - Address line 2
  - Address line 3
  - City
  - Province
  - Postal Code
4. Click Edit to update the required information.
5. Click Submit.

## Add or Remove a Child Company Group

To add a child company group

1. Navigate to User Management > Company Groups.
2. Hover over the appropriate label.  
The Add Child button is displayed.
3. Click Add Child.  
The Add Child pane is displayed.
4. Update the required information.
5. Click Submit.  
A Child Company Group is successfully create message is displayed.



### Note

To remove a child company group, hover over the appropriate child company group and click Remove

# Member Management

## Member Dashboard Configuration

In this section, select up to nine pods to display on the member dashboard screen. Alternatively, you can configure the dashboard based on role groups. If a user's primary role group has a configured dashboard, that configuration overrides the one set in Global Configuration. For details, see the [Configure Member Details](#) link above.

This feature integrates with a pharmacy claims system. If you don't integrate with one, the system displays the medication name, frequency, and status of the member's five most recent medications. If you do integrate with a pharmacy claims system, it displays the medication name, last fill date, days supply, expected refill date, and a flag if the regimen is overdue for a refill. In both cases, the system lists medications in order from most recent to oldest.

To configure the display, select pods from the Available Pods list and click the right arrow to move them to the Display Order list. Use the up and down arrows to set the field order, or drag items between the Available Pods and Display Order lists. Pods marked FW (full-width) span the entire work area; all others appear two per row, each taking up half the width of the work area.

## Member Dashboard Configuration

In this section, you can select up to nine pods to show on the member dashboard screen. (Alternatively, you can specify dashboard configuration based on role groups. If a user's primary role group has a dashboard configured, that configuration overrides the one specified in Global Configuration. For details, see the [above Configure Member Details](#) link.)

By default, these pods appear:

- Banner — General information about the member, such as preferred name and eligibility. Spreads across the full width of the work area.
- Alerts — User and system alerts. Spreads across the full width of the work area.
- Timeline — A graphical view of member activity such as the creating of authorizations. Spreads across the full width of the work area.
- Active Contacts
- Active Eligibilities
- Open Authorizations
- Open Diagnoses
- Referrals
- Open Programs

Additional options include Key Metrics, Active Allergies, Medications, Open Care Opportunities, and Quality Measures.

The fields that appear in the Medications pod in TruCare depend on whether your TruCare configuration integrates with a pharmacy claims system. If you do not integrate with a pharmacy claims system, you see the medication name, frequency, and status of the member's five most recent medications. If you integrate with a pharmacy claims system, you see the medication name, the date the medication was last filled, the number of days supply, the expected refill date, and a flag if the regimen is overdue for a refill. In both cases, the medications are listed with the most recent medications first.

Select pods from the Available Pods list and select the right arrow to move them to the Display Order list. You can specify the order of the fields in the Display Order list using the up and down arrows. You can also drag items between the Available Pods list and the Display Order list.

Apart from the pods that take up the full-width of the work area (denoted with FW), the other pods appear in left-to-right order, two pods in a row. Each pod uses half the width of the work area.

## Member Demographics

To configure Member Demographics

1. Navigate to Member Management > Member Demographics.

The Member Demographics page is displayed.

2. Click Edit and update the required settings.
3. Click Submit.

A Member Demographics was successfully submitted message is displayed.

## Member Reconciliation

Configure the parameters that determine whether a member is a duplicate. In TruCare, users can view and merge duplicate member records using the Member Reconciliation feature. To control how TruCare identifies potential duplicate members for reconciliation, use Configure Reconciliation in TruCare Admin.

To edit Member Reconciliation

1. Navigate to Member Management > Member Reconciliation.
2. Click Edit.
3. In the Weight Label column, change the value in the drop-down.
4. In the Actions column, Enable or Disable the line item.
5. Update the Member Record Match Percentage.
6. Click Submit.

A Member Reconciliation was successfully submitted message is displayed.

## Member Search

You can configure the columns in the TruCare Member Search browser by selecting up to nine columns to display. The default column, Actions, always appears and cannot be changed.

This configuration applies only when the global setting Enable users without permission to a member to see that member in search results is enabled. The Member Search Management feature limits the information visible to users without proper permissions.

## Member Search Settings

In this section, select these options related to member search:

- **Required BHP Selection on New Member Creation**
- **Include State and Zip Code as search parameters**
- **Enable users without permission to a member to see that member in search results.**
  - The default is to not allow users to see the member in search results.
  - Select it to allow users to see the member in search results. The information for the member in the other columns is masked and the user cannot open the member record. This option allows users to verify that the member is in the system.
- **Member Search Default Country** — This option allows you to configure a default country for the member search.

In TruCare:

- Depending on the country selected from the drop-down list, certain fields appear when searching for a member.

- The user must select the country to use **State** and **Zip Code** fields in the search.
- The values available for the state and the format of the zip code depend on the country.
- If the search is performed from the **Birth Event** screen, the default country configuration is retrieved from the member's BHP configuration.

To configure Member Search

1. Navigate to Member Management > Member Search.  
The Member Search page is displayed.
2. Click Edit.  
The Edit Member Search pane is displayed.
3. Configure the required options and click Submit.  
A Member Search Setting is submitted message is displayed.

## Mobile Offline & Lock Timer

To configure the Mobile Offline & Lock Timer

1. Navigate to Mobile Offline & Lock Timer.  
The Mobile Offline & Lock Timer page is displayed.
2. Click Edit.  
The Mobile Offline & Lock Timer pane is displayed.
3. Configure the required options and click Submit.  
A Mobile Offline & Lock Timer was successfully submitted message is displayed.

# System Management

## Global configuration

You can define the global interface settings in the TruCare application. These settings help to determine the appearance of TruCare.

## Global configuration settings

You can set global configuration options for TruCare .

## Purge workflow for inactive members

### Harman Browser Interface

The purge workflow removes members who have not had activity in TruCare and whose eligibility expired before the configured timeframe. Members with activities in TruCare are excluded from the purge process, ensuring critical data remains intact.



#### Important

The purge process must be run exclusively. Do not execute it alongside other processes such as IMEX exports, data feeds, or backups to avoid system conflicts.



#### Note

The purge process settings are not included in the IMEX process and will need to be configured in each environment.

This workflow ensures efficient data management with minimal impact.

## Setting up the cron expression

The cron expression in the **trucares.properties** file determines when the purge workflow runs (e.g., every Sunday or the first day of the month or specific time in a day). By default, the purge process will run every night at 2:00 am.

Follow these steps to configure the cron expression:

1. Access the drive where TruCare is installed and go to *TruCare\TruCare\config folder\trucares.properties* file.



#### Note

- If you have access to the installation server, you can update the cron expression. You can modify the **config/trucares.properties** file to set the job's frequency.
- You must restart the TruCare Application Server service for the changes to take effect.

2. Right-click the **trucares.properties** file and select Edit with Notepad.
3. Locate for the property named *memberdata.purge.cron.expression*.
4. Set a value for the memberdata.purge.cron.expression schedule.  
For example, memberdata.purge.cron.expression=0 0 2 \* \* ? \*  
It means that the workflow runs 2:00 AM (Local time) every day.
5. Save the changes and restart the TruCare Application Server service to apply the updated cron expression.

## Configuring purge workflow in TruCare Admin

By default, the Purge configuration is disabled. To use it, enable the setting and enter the details for three required parameters to start the purge process.



### Important

The purge process must be run exclusively. Do not execute it alongside other processes such as IMEX exports, data feeds, or backups to avoid system conflicts.

Follow these steps to configure the settings in TruCare Admin:

1. In TruCare Admin, go to Global Configuration > System Management.
2. Click Edit.
3. Configure the following settings under *Purge Member configuration*:

- a. Select the checkbox next to the **Enable inactive member purge** setting.

Enabling the above setting also enables the following fields/parameters along with the default value details:

Fields	Allowed Range	Default Value
<b>Purge the batchsize</b>	1 - 100,000 members	30 members
<b>Number of hours purge process should run</b>	1 - 100 hours	1 hour
<b>Number of months prior to current time to check eligibility termination date</b>	1 - 2400 months	18 months

- b. Enter a value for the **Purge the batchsize**. You can use smaller batch sizes.



### Note

If the batch size is too large, then it may cause performance issues such as increase instance memory usage and the risk of failure.

Batches run until reaching the configured time limit. Start with smaller batches and monitor performance and disk usage.

- c. Enter a value for the **Number of hours purge process should run**.

The stored procedure will pause when the time limit is reached and resume in the next scheduled workflow run.

For example, if a purge batch starts at the last minute of 1 hour (cut-off time) with a 10K batch size, the process will run beyond the cut-off and finish after the last batch at the 59th minute. You can use smaller batch sizes.

- d. Enter a value for the **Number of months prior to current time to check eligibility termination date**.



### Note

The system allows months from value 1, so be cautious when entering the "number of months".

4. Click Submit.

## Handling foreign keys in temp tables

The foreign keys need to be handled in temp tables before purging.

Follow the steps:

1. Identify temp tables with foreign keys: Check if any temp tables (e.g., MemberRisk\_61) reference the Member table or its child tables (which are part of purge solution).
2. Drop or disable foreign keys: If a temp table has a foreign key, drop or disable it before running the purge solution to avoid constraint violations.

3. Drop those temp tables: If the temp table is no longer required, drop it instead of managing the foreign keys.

## Purging of inactive member records for database optimization

The cron expression triggers the job, which calls the stored procedure. The procedure checks member eligibility for purging and purges eligible members. It stores purged member details in the *PurgedMemberData* table for audit purposes, then adds the data to a Comma Separated Values (CSV) report and cleans up the table.

**Follow these steps to keep the database optimized by retaining only relevant data:**

1. Connect to SQL Server.



### Warning

Backup the database before running the purge process to prevent potential data loss in case you need to restore any data.

2. Connect to the Casenet database.



### Note

Clean up or remove foreign keys from temp tables before triggering the purge solution. For more information, see [Handling foreign keys in temp tables \[228\]](#).

3. The *tcsp\_Member\_Purge* stored procedure is triggered by cron expression. A member's activity is searched in these following table categories related to TruCare artifacts:
  - Authorizations
    - [casenet].[dbo].[UMAuthorization]
    - [casenet].[dbo].[UMAuthorizationNotification]
  - Referrals
    - [casenet].[dbo].[Referral]
  - Cases
    - [casenet].[dbo].[Cases]
  - Assessments
    - [casenet].[dbo].[Assessment]
  - Notes
    - [casenet].[dbo].[NoteInstance]
  - Care plan
    - [casenet].[dbo].[CarePlan]
  - Cost Savings
    - [casenet].[dbo].[CostSavingsInstance]
    - [casenet].[dbo].[CostSavingsInstance\_Draft]
  - Diagnosis
    - [casenet].[dbo].[Diagnosis]
  - Correspondence
    - [casenet].[dbo].[ExternalLetter]
  - Tasks
    - [casenet].[dbo].[JBPM\_TASKINSTANCE]
  - Birth Events
    - [casenet].[dbo].[BirthEvent]

- Key Metrics  
[casenet].[dbo].[KeyMetricInstance]
- Risk Indicators  
[casenet].[dbo].[RiskIndicator]  
[casenet].[dbo].[RiskIndicatorHistory]
- Time Tracking Activity  
[casenet].[dbo].[TimeTrackingActivity]



### Note

- If any activity (active record) is found, then the member's data is not purged.
- In case, if termination date for members with no activity is prior to the purge date, then such members are eligible for purge.

4. The details of purged members can be seen only in CSV files.



### Note

The process purges inactive members and keeps essential data for audits in a CSV file in the *PurgeReports* folder within the logs folder.

## Accessing the CSV file

The workflow copies inactive member's critical data from the reporting table to a Comma Separated Values (CSV) file and deletes the data from the reporting table. Each complete execution generates a new CSV file, if there are any purged records during the execution.

Follow these steps to access a CSV file's details:

1. Access the drive where TruCare is installed and go to *TruCare\TruCare\apache-tomcat\logs\PurgeReports*.



### Note

You receive a similar folder structure when installing the TruCare application. With access to TruCare installation server, you can navigate to *TruCare\TruCare\apachetomcat\logs\PurgeReports* folder to access the generated purge reports.

2. Right-click a **.csv** file under *PurgeReports* folder and select Edit with Notepad.
3. Check for the following details in an existing CSV file:  
The above details can be used for offline analysis, reporting, and maintaining a record of the data that has been purged.
  - The records for columns which were defined in the *PurgedMemberData* table: Member ID, External Member ID, FirstName, Last Name, DOB, Employer, Group Number, Purged Date, Purge Reason, Eligibility Start Date, and Eligibility Termination Date.
  - The purge reason mentioned as *Member's eligibility expired "x" months ago and has no history of activity in TruCare* for outdated members.
  - Details related to the Eligibility Termination Date.

## Monitoring lock and process execution in server log

The server log helps understand the overall workflow process and it contains relevant details related to *MemberDataPurgeJob*.

Follow these steps to access the server logs:

1. Access the drive where TruCare is installed and go to *TruCare\TruCare\apache-tomcat\logs\server*.

2. Right-click the server file and select Edit with Notepad.
3. Check the following *MemberDataPurgeJob* log entries in this file to monitor the workflow's status:
  - Log entries related to *locked by another thread* indicates that a process locked *MemberDataPurgeJob* entries.

**Note**

The purge process must run exclusively and not alongside regular activities or processes like IMEX process export, data feeds, backup, etc.

- Log entries related to *releasing the lock* indicates that a process has released *MemberDataPurgeJob* entries upon completion.
- Log entries related to *acquired the lock*.
- Log entries related to *Purge inactive Member Data BEGIN* indicates the stored procedure was triggered.
- Log entries related to converting Comma Separated Values (CSV) begins and CSV ends.
- Monitor the log file size growth during process and its maintenance on a production system.

## Data Management

### Data Feed Execution Configuration

Use the Data Feed Execution tab in TruCare Admin to load data from the staging environment to the OLTP database on an ad hoc basis.

**Note**

Refer to the complete instructions for creating the necessary permissions, roles, and scripts that allow TruCare administrators to load data from the staging environment to the OLTP database on an ad hoc basis.

To edit the Data Feed Execution Configuration

1. Navigate to System Management > Data Management > Data Feed Execution Configuration.
2. Click Edit.

The Edit Data Feed Execution Configuration pane is displayed.
3. Update the required fields and click Submit.

### Upload Management

TruCare users can upload various file types in multiple areas throughout the system. Use Upload Management to define the allowed file types and maximum file sizes.

In addition to the settings you configure, uploaded file names must meet the following criteria:

- The full file name, including the extension, must not exceed 100 characters.
- The file name must be alphanumeric and may include letters (A–Z, a–z), numbers (0–9), dashes (-), underscores (\_), and spaces.
- The system allows the following file extensions by default: bmp, doc, docx, gif, jpg, pdf, png, ppt, pptx, rtf, tif, txt, xls, xlsx.

To edit Upload Management

1. Navigate to System Management > Data Management > Upload Management.

2. Click Edit.  
The Edit Upload Management pane is displayed.
3. Add the required Credentials and click Submit.

## Edit Environment Settings

To edit the Environmental Settings

1. Navigate to System Management > Environmental Settings.  
The Environmental Settings page is displayed.
2. The Environment Settings page displays the following options:
  - Details
  - Custom Logo File - Click to Upload a custom logo and Click Submit.



### Note

The minimum Image Dimension must be

- Width - 375 px
  - Height - 100 px
1. Click Edit.
  2. Update the required information and Click Submit.
- TruActivity Configuration
  - Localization - To update the Localization:
    1. Click Edit.
    2. Update the required information and Click Submit.
  - Holiday Calendar Edit

## Create a Holiday Event

To create a Holiday Event

1. Navigate to System Management > Environment Settings.
2. Scroll to the Holiday Calendar section and click Edit.  
The Edit Holiday Calendar pane is displayed.
3. In the Holiday Calendar List tab, click Create Holiday Event.
4. Enter the required information and click Submit.  
The Holiday Event is created in the Holiday Calendar List tab.
5. Click Submit.  
The Holiday Event is displayed in the Holiday Calendar summary page.

## Security Settings

### Single Sign-On

Single Sign On (SSO) can be used by TruCare and ProAuth users accessing the application using a web browser.

This setting is environment-specific and, if enabled, is used by all users logging into TruCare or ProAuth.

- When SSO is enabled, the user cannot manually enter a user name and password to access TruCare or ProAuth, and logins are managed by the configured Identity Provider (IdP). Users who are logged out of the Identity Provider must reauthenticate before continuing to work in TruCare ProAuth.
- The Security Assertion Markup Language (SAML) is an open standard for exchanging authentication and authorization data between parties, in particular, between an identity

provider and a service provider. TruCare does not support SAML protocols that predate SAML 2.0. TruCare does not support the SAML global logout functionality.

The following is an overview of the process to enable SSO.



### Note

Ensure to enable SSO in the `/TruCare/TruCare/config/trucare.properties` file. Refer to [Enable SSO in the `trucare.properties` file \[233\]](#) for how to enable SSO in that file.

1. Navigate to System Management > Security Settings > (SSO) Single Sign-On.
2. Click Edit.

The Edit Security Settings pane is displayed.

3. To enable or disable the SSO:
  - a. For Single Sign-On in ProAuth: Enable SSO
  - b. For Single Sign-On in TruCare: Enable SSO in TruCare
4. Update the required information.



### Note

Refer to [SSO settings \[234\]](#) for information on those options.

5. Click Submit.

## Enable SSO in the `trucare.properties` file

To use SSO, you must first enable it in the `/TruCare/TruCare/config/trucare.properties` file.

The `/TruCare/TruCare/config/trucare.properties` file must be modified to enable SSO for TruCare and ProAuth.

The SSO settings are found in the `/TruCare/TruCare/config/trucare.properties` file in the section:

```
##### UAA/Security Properties #####
```

The default URL of the gateway proxy for ProAuth is:

```
gateway.base.url=http://localhost:8000
```

The `uaa.server.url` URL must match what is configured as the **Entity Base URL** in the **Enable SSO** configuration window in TruCare Admin under System Management → SSO → TruCare Metadata generator.

- Use the following `uaa.server.url` URL for standalone TruCare deployments that do not use a gateway proxy:

```
uaa.server.url=http://<host or load balancer>:<port>/casenet-server
```

For example: `uaa.server.url=http://localhost:8080/casenet-server`

- Use the following `uaa.server.url` URL for distributed ProAuth or systems with both ProAuth and TruCare deployments that use a gateway proxy:

```
uaa.server.url=http://<gateway proxy host>:<gateway proxy port>
```

For example: `uaa.server.url=http://localhost:8000/casenet-server/uaa`

For ProAuth, this must match the `clientSecret` in the `application.yml` file for the TruCare API Gateway. Refer to the [TruCare ProAuth Installation Guide](#) for information about the `application.yml` file.



## Note

The `clientSecret` can be any random string. for example, a 256-bit random key generated from <https://randomkeygen.com/>. The following are examples of such strings:

- `gateway.client.secret=PI2h5eoqGt2KRq63gAObleg7CHtTXICS`
- `api_user.client.secret=h08nmL0CsBwjBHp39uIV9p8YEoe7o3xZ`

## SSO settings

Describes the fields used to enable and configure SSO.

The following describes and, if applicable, recommends values for SSO settings. These settings are organized by the section headings on the SSO screen.

**Table 26. Description of SSO settings**

Section	Field	Required or Optional	Description
None	<b>Enable SSO</b>	Optional	Enables SSO for ProAuth users.
None	<b>Enable SSO in TruCare</b>	Optional	Enables SSO for TruCare users. The <b>Enable SSO</b> option must also be selected.
Keystore Configuration	<b>Path to keystore file</b>	Optional	This is the full path to the keystore file location on a shared drive.
	<b>Keystore password</b>		This is the password that is used to gain access to the keystore file. This password is created at the time the keystore file is created.
IDP Configuration	<b>Path to IDP metadata file</b>	Required	This is the full path to the Identity Provider metadata file location on the shared drive.
TruCare Metadata generator	<b>Entity ID</b>	Required	This is a unique identifier of the service provider.
	<b>Entity Base URL</b>	Required	This is the base URL that is used by the system to construct SAML endpoints to the server, port, and context path. The URL must have a protocol.
	<b>Signing Key</b>	Mandatory if <b>Sign SentAuthNRequest</b> is <b>Yes</b> .	This drop-down list is pre-populated by key aliases from the keystore. The signing key signs the authorization requests to the identity provider.
	<b>Encryption Key</b>	Required	This drop-down list is pre-populated by key aliases from the keystore. This is used for local entities alias of private key used to encrypt data.

Section	Field	Required or Optional	Description
	<b>SSL/TLS client authentication</b>	Optional	<p>This drop-down list is pre-populated by key aliases from the keystore.</p> <p>This is a keystore for local key aliases, specifically local entities aliases of private keys used for SSL/TLS client authentication.</p> <p>No client authentication is used when a value is not specified.</p>
Advanced Configuration	<b>Signature Security Profile</b>	Optional	<p>This drop-down list contains MetalOP and PKIX.</p> <p>This is a security profile for the verification of message signatures.</p>
	<b>SSL/TLS Security Profile</b>	Optional	<p>This drop-down list contains MetalOP and PKIX.</p> <p>This is a security profile for the verification of a trusted SSL/TLS endpoint.</p>
	<b>SSL/TLS hostname verification</b>	Optional	<p>This is a drop-down list that contains the values Standard hostname verifier, Standard hostname verifier (skips verification from local host), Strict hostname verifier, and Disable hostname verification.</p> <p>These connections to the HTTPS services require verification that the connected hostname corresponds with the hostname defined in the service's public certificate.</p> <p>Hostname verification is enabled by default.</p>
	<b>Sign Metadata</b>	Optional	<p>This drop-down contains Yes and No. No is the default.</p> <p>When true generated metadata is signed it is signed using an XML signature.</p> <p>This XML Signature has a certificate with the alias of signingKey.</p>
	<b>Signing algorithm</b>	Optional	<p>This works in conjunction with the <b>Sign Metadata</b> field.</p> <p>The algorithm is used to create a digital signature on the metadata object. At this time, TruCare only accepts the following values:</p>

Section	Field	Required or Optional	Description
			<ul style="list-style-type: none"> <li>▪ <a href="http://www.w3.org/2000/09/xmldsig#rsa-sha1">http://www.w3.org/2000/09/xmldsig#rsa-sha1</a></li> <li>▪ <a href="http://www.w3.org/2001/04/xmldsig-more#rsa-sha256">http://www.w3.org/2001/04/xmldsig-more#rsa-sha256</a></li> <li>▪ <a href="http://www.w3.org/2001/04/xmldsig-more#rsa-sha512">http://www.w3.org/2001/04/xmldsig-more#rsa-sha512</a></li> </ul> <p>These values must be entered into the field exactly as they are shown above.</p>
	<b>Sign SentAuthNRequest</b>	Optional	<p>This drop-down list contains Yes and No. The default value is Yes. This is a flag that indicates whether this service signs authentication requests. If Yes, the user must also complete the <b>Signing Key</b> field.</p>
	<b>Require Signed Auth Assertion</b>	Optional	<p>This drop-down list contains Yes and No. The default is No. This is a flag that indicates whether this service requires signed assertions from the identity provider. Even if this is indicates as Yes, TruCare does not need a user to specify which key alias to use.</p>
	<b>Require Signed Logout Request</b>	Optional	<p>This is a drop-down list that contains Yes and No. The default is No. This enables the requirement of signed log out requests.</p>
	<b>Require Signed Logout Response</b>	Optional	<p>This drop-down list contains Yes and No. The default is No. This enables the requirement of signed log out responses.</p>
	<b>Required Signed Artifact Resolve</b>	Optional	<p>This is a drop-down list that contains Yes and No. The default is No. This enables the signing of artifact resolution requests sent to the remote identity provider.</p>
	<b>Supported Name IDs</b>	Required At least one value must be indicated as included. If only one value is selected,	<p>This is a list of check boxes that includes the options of Email, Transient, Persistent, Unspecified, and X.509 Subject. It is possible that two or more system entities may use the</p>

Section	Field	Required or Optional	Description
		TruCare defaults to the selected value.	<p>same name identifier value when referring to different identities. Thus, each entity may have a different understanding of that same name.</p> <ul style="list-style-type: none"> <li>SAML provides name qualifiers to disambiguate a name identifier by effectively placing it in a federated namespace related to the name qualifiers.</li> <li>SAML allows an identifier to be qualified in terms of both an asserting party and a particular relying party or affiliation, allowing identifiers to exhibit pair-wise semantics, when required.</li> </ul> <p>Refer to Supported Name IDs table for more information for each of the options.</p>
	SSO Binding — Default, Included, Name	<p>Required</p> <p>At least one value must be indicated as included. If only one value is selected, TruCare defaults to the selected value.</p>	<p>The list of names include: SSO HTTP POST, SSO Artifact, SSO PAOS, HOK SSO Artifact, and HOK SSO HTTP-POST. From this list, select the bindings to be included in the metadata for WebSSO profile. The supported values are POST, Artifact, and PAOS. The order of bindings in this property determines the order of endpoints that are in the generated metadata.</p> <p>From this list, choose the bindings to be included in the metadata for the WebSSO Holder-of-Key Profile. The supported values are POST and Artifact. The order of bindings in this property determines order of endpoints in the generated metadata.</p> <p>This check list allows multiple choice to indicate whether selected profile is to be included in the service provider's metadata. The radio button indicates which is the default profile.</p>

## Enable SSO

Use the SSO settings to enable SSO with TruCare.

1. Select System Management → SSO.
2. Select **Edit**.
3. Select the appropriate SSO options to enable.
  - Select **Enable SSO** to enable SSO for ProAuth users, or as the first step in enabling SSO for TruCare users.
  - Select **Enable SSO** and **Enable SSO in TruCare** to enable SSO for TruCare users.
4. Specify the keystore configuration.
  - a. Enter the **Path to keystore file**, including the name of the file. TruCare supports the **.jks** file format.
  - b. Enter the **Keystore password**.
  - c. Select **Apply**.
5. Enter the **Path to IDP metadata file**, including the file name.
6. Complete the **TruCare Metadata generator** section. For details, see [SSO settings \[234\]](#).
7. Select **Submit**.
8. Select **Copy Metadata to Clipboard**. This button is enabled only after a successful configuration of TruCare as a service provider.

Selecting this button copies TruCare metadata information (SP metadata file) to your clipboard.

## Disable SSO

When you disable SSO, users must log in to TruCare with a user name and password.

1. Select System Management → SSO.
2. Select **Edit**.
3. Clear the **Enable SSO** check box.
4. Select **Submit**.

## Configure SSO using a signed IdP metadata file

You can configure TruCare SSO to use a signed Identity Provider (IdP) metadata file.

If you want to use a signed IdP metadata file as part of your SSO configuration, the IdP's public certificate must be installed on each application server. One way to do this is to use a keystore, such as the TruCare keystore, to store the keys and certificate as follows. In the following steps, **TruCare-RT.cer** is the public certificate name.

1. Export the signed metadata file and copy it to a location on your network.
2. Export the certificate (the **.cer** file) and copy it to a location on your network.
3. Open a command prompt and change the directory to that of the TruCare keystore.

The following is an example of this command.

```
cd D:\Trucare\Trucare\apache-tomcat\lib
```

4. Generate the key pair.

In most cases you can accept the default values when prompted for private key information. The following is an example of the command used to generate the key pair.

```
keytool -genkeypair -keystore trucare.keystore
```

5. Import the certificate (the **.cer** file) using a command line like the following.

```
keytool -importcert -alias <alias> -file <Certificate-file-path-and-name> -keystore trucare.keystore
```

For example, the following command imports the certificate **TruCare-RT.cer** using the alias **Myalias**.

```
keytool -importcert -alias Myalias -file D:\Certs\TruCare-RT.cer
-keystore trucare.keystore
```

6. Log in to TruCare Admin and select System Management → SSO.
7. Select **Enable SSO** and **Enable SSO in TruCare**.
8. In the Keystore Configuration section, supply the keystore location and password.
  - a. Enter the location in **Path to keystore file**. For example, **D:\TruCare\TruCare\apache-tomcat\lib\trucare.keystore** is a valid location.
  - b. Enter the keystore password in **Keystore password**.
  - c. Select **Apply**.
9. In the IDP Configuration section, supply the location of the metadata file in **Path to IDP metadata file**.  
This is the location to which you copied the file earlier. The following is an example of the metadata file path: **D:\Certs\TruCare-RT.xml**.
10. In the TruCare Metadata generator section, supply the entity ID and base URL.
  - a. Enter a value for the **Entity ID**, for example **trucare-stage.myexamplecompany.org**.
  - b. Enter a value for **Entity Base URL**. Typically this will be the TruCare load balancer URL.
11. Select **Submit**.
12. Verify that the keystore is valid by selecting **Signing Key**. If there is a value that you can select, the keystore is valid. You do not need to select the value, just verify that it exists.
13. If you have a multiserver configuration, make the keystore available to all application servers so that the keystore can be loaded by each application server when they restart. Use one of the following methods.
  - Copy the keystore to a common network location that all application servers can access.
  - Copy the keystore to a similar location on each application server.
14. Restart the application servers for the SSO changes to take effect.  
The server on which you made these changes using the TruCare Admin does not need to be restarted as it already has these changes.
15. Verify that the SSO changes have been successful.
  - a. Clear your browser cache or close and reopen the browser.
  - b. Log in to TruCare.

## Behavior when SSO is enabled and TruCare times out

When SSO is enabled, TruCare still times out after the application is idle for 30 minutes.

When this occurs, a TruCare Timeout screen opens, hiding sensitive information. This screen is shown instead of the log in screen. When the TruCare Timeout screen opens, it is assumed that the same user that accessed TruCare before the timeout is the user that will access TruCare again.

To resume working in TruCare after timeout, select **Resume**.

## Light Directory Application Protocol (LDAP)

The LDAP feature allows integration with Microsoft Active Directory (AD).

The table shows special considerations when integrating with AD.

Active Directory	TruCare
Deleting User Accounts	User accounts created in TruCare cannot be deleted. They can only be disabled. User accounts deleted from AD are shown

Active Directory	TruCare
	<p>in TruCare as disabled. When a user account is disabled as part of invoking the LDAP synchronization functionality, TruCare includes a warning in the <code>server.log</code> file that lists the user account and the reason the account was marked as disabled.</p> <ul style="list-style-type: none"> <li>▪ A user with a disabled account cannot log in to TruCare.</li> <li>▪ Synchronization must occur and a log out and log in is required to view the changes.</li> <li>▪ Data associated with the disabled user account remains in TruCare.</li> </ul>
Changing User Names in AD	<p>If a user's first or last name is changed in AD but the user name remains the same, then the change is reflected in TruCare. If the user name is changed in AD, it is treated as a new user in TruCare. TruCare does not automatically associate all data under the old name to the new user name.</p>
Long Phone Extensions	<p>If a phone extension in AD is longer than 7 digits, it is truncated when synchronized. The last 7 digits display in TruCare.</p>

## Synchronize TruCare to LDAP

During Light Directory Application Protocol (LDAP) sync, the system sets a user's single role group as the primary role group if none is defined. A primary role group is required. The system logs a warning for users who have multiple role groups but no primary role group. After the sync, edit these users and assign a primary role group.

If the previous sync disabled the user's primary role group, the next sync can overwrite it with a new role group.

1. Navigate to System Management+Security Settings → (LDAP) Light Directory Application Protocol.
2. Click Edit.
3. Click **Synchronize**.

To continue, click any other navigation option outside the (LDAP) Light Directory Application Protocol.

## External Services

### Custom URL

You can give users access to web pages or applications directly from TruCare by configuring the Resources menu item.

Keep the following in mind when setting up custom URLs:

- You can enable up to 40 URLs for access from TruCare. Only enabled URLs appear in the interface, but you can store an unlimited number of disabled URLs.
- TruCare stores the URLs that administrators submit for customer use.
- The Resources menu in the TruCare menu bar displays URLs in alphabetical order.
- The user's browser, its configuration, and any installed plug-ins (such as Adobe Flash) determine how the URLs behave.
- TruCare supports only certain technologies for custom URLs. For example, URLs that use the `file://` protocol or begin with `\\` do not work due to Adobe-imposed security restrictions.
- After configuring URLs, test them to ensure they function as expected in TruCare.
- Avoid using URLs or protocols that introduce security vulnerabilities.

To add a custom URL

1. Navigate to System Management > External Services > Custom URL.
2. Click Create URL.
3. Enter the required information.



### Note

To enable or disable the Custom URL, select Yes or No in the Enabled option.

4. Click Submit.

## UM Clinical Criteria

Choose this option to define custom criteria through a jump page.

To edit the UM Clinical Criteria

1. Navigate to System Management > External Services > UM Clinical Criteria.
2. Click Edit.
3. Update the required information and click Submit.

## Edit Collaborate Handshake Link

To edit the Collaborate handshake link

1. Navigate to System Management > External Services > Collaborate.  
The View Collaborate Settings page is displayed.
2. Click Edit.
3. Update the Handshake URL and click Submit.

## Find Help Integration

To update the Find Help Integration

1. Navigate to System Management > External Services > Find Help Integration.
2. Click Edit.
3. Update the required information.
4. Click Submit

## Edit Health Literacy Content

To edit the Health Literacy Content

1. Navigate to System Management > External Services > Health Literacy Content.  
The Health Literacy Content page is displayed.
2. The Health Literacy Content page displays the following options:
  - Enable Healthwise
  - Healthwise URL
  - Client ID
  - Client Secret Code
  - Username
  - Password
  - Authorization URL
3. To update the information, click Edit.
4. To save the updated information, click Submit.

## BRE External Service

You can configure TruCare to use an external rules engine to evaluate required authorizations. If you already use an application with rules for determining authorization requirements and

that application offers a REST API, you can integrate it with TruCare using the BRE External Services feature.

This integration allows you to maintain a single set of rules across both systems and extend TruCare's existing rules with decisions from the external engine. Refer to the Integration with an External Resource section in the TruCare Business Rules Guide for guidance on preparing your external service before setting up the integration in TruCare Admin.

After setting up the required endpoints, use the BRE External Services tab in TruCare Admin to configure access to the external service. You can also define the timeout duration for call and read events. You can configure either one external resource containing all authorization information or separate external resources for each API call—for example, based on authorization type.

You can also combine external rules with BRE table columns to trigger the external rule only for specific criteria, such as males over age 30.

To add BRE External Service

1. Navigate to System Management > External Services > BRE External Services.
2. Click Create External Services.

The Create External Service pane is displayed.

3. Enter the required information and click Submit.

## Jump Page

TruCare lets you configure the Jump Page menu item to launch a browser screen to a specified URL when triggered. Alternatively, you can use the Custom URLs feature to enable up to 40 URLs.

The Jump Page feature does not support interaction or data transfer into TruCare.

To edit the Jump Page

1. Navigate to System Management > External Services > Jump Page.
2. Click Edit.
3. Update the required information click Submit.

## Analytics URL

To edit the Collaborate handshake link

1. Navigate to System Management > External Services > Analytics URL.  
The Analytics URL page is displayed.
2. Click Edit.
3. Update the Handshake URL and click Submit.

## Claim System Destination

For complete information on the claim system destinations, see the "Multiple Destinations" section in the TruCare 278 Reference Guide.


## Create New Destination

To create a destination

1. Navigate to System Management > Claim System Destination > Create New Destination.  
The Create New Destination pane is displayed.
2. Enter the required information.
3. Click Submit.

## Edit Destination

To edit Destination

1. Navigate to System Management > External Services > Claim System Destination.  
The Claim System Destination page is displayed.
2. In the Actions column, click  > Edit.
3. Update the required information.
4. Click Submit.

## AI Models

To modify the AI Models setting

1. Navigate to System Management > External Services > AI Models.
2. Click Edit.
3. Select Enable and enter the Attnio Integration URL.
4. Click Submit.

## User Notification

### System Messages

Use system messages to broadcast announcements to TruCare users. When the scheduled start time arrives, TruCare displays the system message as a pop-up for users who are logged in.

During the specified time frame, the system also displays the message as a red dashboard banner so users who log in later can see it.

You can search for and edit a message to:

- Change the message content before it appears.
- Reschedule the message with the same or revised text.
- Disable the message to prevent it from running.



#### Note

You cannot delete system messages.

Since system messages apply only to a specific environment, you must create them directly within each TruCare Admin environment where you want the messages to display.

## Create System Message


To view System Messages

1. Navigate to System Management > User Notification > System Messages.
2. Click Create Message.  
The Care Message pane is displayed.
3. Enter the required information.
4. Click Submit.

## View System Messages


To view System Messages

1. Navigate to System Management > User Notification > System Messages.  
The System Messages summary page is displayed.

2. In the Actions column, click  > View.  
The View Message pane is displayed.
3. Click Close to return to the System Messages summary page.

## Edit or Disable a System Message

To edit or disable a system message.

1. Navigate to System Management > User Notification > System Messages.
2. In the Actions column, click  > Edit.  
The Edit Message pane is displayed.
3. To edit the System Message, update the required information.
4. To disable the System Message, in the Enable Message option, click Yes or No accordingly.  
A confirmation message is displayed.
5. Click Yes or No accordingly.  
The Edit Message pane is displayed.
6. Click Submit.
7. The status of the System message is updated on the System Message summary page.

## User Message

Set the default number of days for displaying messages to users in the Messaging Pod. By default, TruCare sets this value to seven days. When users open the Messaging Pod, the system automatically populates the From and To dates based on the number of days you specify in this setting.

To edit the Days to display a User Message

1. Navigate to System Management > User Notifications > User Messages.
2. Click Edit.
3. Update the appropriate Days to display in Messaging Pod and click Submit.

## Email Notification

Understanding how TruCare implements email notifications can help you make informed configuration decisions and troubleshoot issues effectively.

When you enable Email Notifications, TruCare starts a SQL Job that runs periodically based on the Job Frequency defined in the Email Notification Settings. Each time the job runs, it reads the email notification configurations set by POST /users/{username}/user-profile/email-notifications to get a list of users, teams, and queues to monitor.

The SQL Job then checks the Task Log for new tasks. If it finds new tasks for any user, team, or queue configured to receive notifications—and the set notification frequency has been met—it sends an email using the SMTP server settings from the Email Notification Settings.

For example, if you set the Email Notifications Job Frequency to 30 minutes and a user's email notification frequency to 1 hour, here's what happens:

- The job runs and finds a new task for the user. If the user hasn't received an email in over an hour, the job sends an email.
- Thirty minutes later, the job runs again and finds another task. However, since it's been less than an hour since the last email, the job does not send another one.
- On the next run—after more than an hour has passed—the job sends the next email to the user.

To edit email notification

1. Navigate to System Management > User Notification > Email Notification

2. Click Edit.  
The Edit Email Notification pane is displayed.
3. Update the required information and click Submit.

## Events

### Events Configuration

You can configure TruCare to notify external applications when specific events occur by using the eventing feature. For example, a health plan company using TruCare may also use a third-party outreach system to contact members about programs they may be eligible for.

With TruCare eventing, you can configure an event to trigger a notification message whenever a Care Management referral occurs. The outreach system subscribes to these events and, upon receiving a referral message, initiates a call to the member. To use TruCare eventing, install and configure the TruCare eventing framework components along with the RabbitMQ messaging framework. TruCare installs with eventing disabled by default.

A privileged administrator must enable and configure eventing using TruCare Admin. Once enabled, you can turn individual event types on or off as needed, and you can disable eventing at any time.

To edit the Events Configuration

1. Navigate to System Management > Events > Events Configuration.
2. Click Edit.  
The Edit Event pane is displayed.
3. Update the required information and click Submit.

### Change Data Capture Settings

Change Data Capture (CDC) captures data changes in TruCare and sends them to other applications, such as TruCare Collaborate. When you enable outgoing CDC, TruCare creates a record in the OutboxEvent table (part of the casenet database) for each change made to supported artifacts (listed below).

The system then quickly moves these records to the cdc.dbo\_OutboxEvent\_CT table in the System Tables section of the casenet database. To enable outgoing CDC, select the Enable CDC checkbox. TruCare automatically selects the checkboxes for all supported artifacts. Clear the checkbox next to any artifact you do not want CDC to track or share with other applications. When you clear a checkbox for an artifact, TruCare stops recording future changes for that artifact. However, it retains previously recorded events in the cdc.dbo\_OutboxEvent\_CT table.

The system does not delete or archive old records automatically. When you reselect an artifact, TruCare resumes recording changes in the table from that point forward. Additional configuration is required to fully enable CDC. For complete setup steps, refer to the Configuring Change Data Capture section in the TruCare Upgrade Guide or TruCare Installation Guide.

**Outgoing CDC – Supported Artifacts** TruCare publishes an event (record) to the cdc.dbo\_OutboxEvent\_CT table whenever it detects changes to a selected artifact. Each message includes complete artifact information along with the updated data.

To edit Change Data Capture Settings

1. Navigate to System Management > Events > Change Data Capture Settings.
2. Click Edit.  
The Edit Event pane is displayed.
3. Update the required information and click Submit.

# Update License

You can update a license at any time. A TruCare customer license file remains valid for one year. For every fresh TruCare installation, you must match the major release version of the license with the platform version. When you upgrade an environment, you do not need a new license unless the current one has expired.

## View License

To view License

- Navigate to System Management > Update License.  
The View Update License page is displayed.

## Edit or Update the License

Obtain a new license file from Zyter|TruCare before you perform a license update in TruCare Admin.

To Edit or Update the License

1. Navigate to System Management > Update License.
2. Click Edit.
3. Click to upload.
4. Navigate and select the appropriate license XML file.
5. Update the Customer Name and Expired date.
6. Click Submit.

# Third party configuration

Configure TruCare to work with external applications.

The **Third Party Configuration** option under **System Management** is available in both the Golden Configuration and Production environments. These settings can be modified based on the admin group permissions of the user logged into TruCare Admin. For settings that require an URL to be configured, Zyter|TruCare recommends ensuring that the correct URL appears in the Production environment.

You can configure these third party applications to work with TruCare:

- A decision-support application. You can configure one of these applications:
  - MCG CareWebQI®
  - InterQual Connect™
- MCG Chronic Care Guidelines.
- TruCare Collaborate

## Configure CareWebQI® settings

TruCare can be integrated with the MCG CareWebQI® software so you can access the evidence-based care guidelines to perform reviews. For information on the specific versions supported, refer to the [Third Party Support Matrix](#).

If you upgraded your instance of TruCare and were previously integrated with a version of CareWebQI® that is no longer supported, the CareWebQI® Version setting reverts to no selection and the Interface Key information is cleared. To continue integrating with CareWebQI®, you must reconfigure TruCare to work with a valid version of CareWebQI®.

Before integrating with CareWebQI®, you must configure some settings in CareWebQI® in Application Setting Configuration.

- Set **Hash Type** to **SHA256**
- Set **Interface: Response Type** to **RedirectOnly**.
- Set **Interface: Default Target URL** to **<TruCare Server URL>/milliman-redirect-response.jsp**.
- If you are using the Chrome web browser, set the **SameSite** cookie setting to **None** to prevent the "Cookies are not enabled" error when attempting to log into CareWebQI® while performing a clinical review. See [Configure SameSite Setting for CareWebQI](#) in the *TruCare Technical Reference Guide* for details.

Consult the [MCG Administration Guide] for further information on configuring these values.



## Note

- If you are using CareWebQI® with Internet Explorer, your **truicare.properties** file must set **SameSite = ""**.
- If you are using CareWebQI® with Chrome, your **truicare.properties** file must set **SameSite = None**.

See [Configure SameSite Setting for CareWebQI](#) in the *TruCare Technical Reference Guide* for details.

1. Click **System Management** → **Third Party Configuration**.
2. In the **UM Clinical Criteria** tab, click **Edit**.
3. Select the **CareWebQI Settings** check box.
4. Select your **CareWebQI Version**.  
TruCare supports CareWebQI® version 15 and CareWebQI® version 16.
5. Enter the **URL** to the CareWebQI® instance.  
For example: **https://<mycompany>.carewebqi.com/**
6. Enter the **Interface Key** for your CareWebQI® instance.  
The interface key is provided by MCG.
7. Click **Submit**.

## Configure InterQual Connect™ settings

You must configure InterQual Connect™ settings so that users can interact with InterQual Connect™ by Change Healthcare in TruCare.

Before users can start using InterQual Connect™, you must first register your certificate and then configure your InterQual Connect™ settings in TruCare Admin. To register your certificate, see [Register your certificate for InterQual Connect™ \[248\]](#).

Before you begin to configure your InterQual Connect™ settings in TruCare Admin, gather the following information from Change Healthcare:

- **Application URL** - URL of the Change Healthcare live system to use.
- **Facility ID** - Identifies your facility. This value is displayed in the Change Healthcare InterQual® window when launched from TruCare.
- **Issuer ID** - A unique value, usually in URL form, also registered with Change Healthcare, which represents the issue of the assertion.
- **Audience Entity ID** - The audience entity ID used in the SAML assertion for the corresponding environment being accessed.
- **Enable Sending PHI** - Select this check box to enable sending protected health information (PHI) to InterQual Connect™.
- **Member ID for Review Sharing** - The value to use to identify the member when using review sharing. See note below for details. The policy number option in the list is the policy number on the authorization line item.

- Line of Business (LOB) - The LOB could be used by Optum to potentially show only Commercial guidelines for non-Medicare population. Optum should be consulted if this feature is desired.



## Note

TruCare users can view ProAuth-submitted clinical reviews in TruCare. For TruCare users to view clinical reviews submitted from ProAuth in InterQual Connect™, Change Healthcare must enable facilities review sharing. If review sharing is not enabled, users see an error when attempting to view the clinical review in InterQual Connect™. Work with your Change Healthcare representative to ensure that review sharing between TruCare and ProAuth facilities is enabled. Then select the member ID to use for review sharing on this screen.

1. Click System Management → Third Party Configuration.
2. On the **UM Clinical Criteria** tab, click **Edit**.
3. Select the **InterQual® Settings** check box.
4. Enter the data in the fields. Then click **Submit**.

## Register your certificate for InterQual Connect™

To access InterQual Connect™ in TruCare, you must first register a Class 2 or greater Public Key Certificate with Change Healthcare.

Obtain the certificate from a recognized public certificate authority. The certificate must have an alias of `iq-connect-keypair`. Then, register the same certificate with TruCare using the Java `keytool` command.

## Prepare to run the keytool command

Before you run the `keytool` command, collect the information you need.

## Viewing and Setting Properties for TruCare

If you want to view or set properties such as passwords and file names, do so in the `setenv.bat` file in your tomcat bin, typically located in `C:\Casenet\TruCare\TruCare\apache-tomcat\bin\setenv.bat`.

## Certificate File

Download the certificate file you registered with Change Healthcare to your computer and place a copy in the `\lib` folder of your Apache Tomcat server, usually located in `C:\TruCare\TruCare\apache-tomcat\lib`. Typically, this file has the extension `.p12` and is in PKCS12 format.

## Keystore File Name

You register the certificate for IQ Connect in the file defined in the system property `TruCare.protected.keyStore`. By default, this existing file is named `TruCare.protected.keystore`, located in the `\lib` folder of Apache Tomcat server.

## Keystore Password

The password to the keystore is defined by the system property `TruCare.protected.keyStorePassword`.

## Key Password and IQ Connect Certificate Password

Use the key password to import the InterQual Connect™ keypair into the TruCare keystore. The InterQual Connect™ certificate password is the password for the certificate file. The password is the same for both of these values.

This password can be the same as or different from the keystore password. If you want it to be different, then define this password in the system property `TruCare.protected.iqConnectKeyPair.password`. Set the property only if you want the value to differ from that for `TruCareKeystorePassword`.

To set this password, edit `setenv.bat`. To add an InterQual Connect™ key pair password, add the `TruCare.protected.iqConnectKeyPair.password` definition to two lines in the file, using this format:

```
set CATALINA_OPTS_SERVICE=%CATALINA_OPTS_SERVICE%;
    -DTruCare.protected.keyStore=%CATALINA_HOME%
\lib\TruCare.protected.keystore;
    -DTruCare.protected.keyStorePassword=myKeystorePW;
    -DTruCare.protected.iqConnectKeyPair.password=myIQConnectPW
```

```
set CATALINA_OPTS=%CATALINA_OPTS%;
    -DTruCare.protected.keyStore=%CATALINA_HOME%
\lib\TruCare.protected.keystore;
    -DTruCare.protected.keyStorePassword=myKeystorePW;
    -DTruCare.protected.iqConnectKeyPair.password=myIQConnectPW
```

If you renamed the keystore file, your value will differ.

**Note:** If you make these changes, reinstall the TruCare Windows service.

## Register the certificate

Register the certificate to the keystore with the alias `iq-connect-keypair`. Use `keytool` in this format::

```
keytool -importkeystore -deststorepass <TruCareKeystorePassword>
-destkeypass <keyPassword> -destkeystore <TruCareKeystoreFile>
-srckeystore <iqConnectCertificateFile> -srcstoretype PKCS12
-srcstorepass <iqConnectCertificatePassword> -alias iq-connect-keypair
```

If your certificate is in another format, you can enter that format in place of PKCS12, as long as `keytool` supports it.

The following is an example of the default command using the certificate file name `iq-connect-keypair.p12`.

```
keytool -importkeystore -deststorepass changeit -destkeypass changeit
-destkeystore
    TruCare.protected.keystore -srckeystore iq-connect-
keypair.p12 -srcstoretype
    PKCS12 -srcstorepass changeit -alias iq-connect-keypair
```

To summarize the arguments:

- `<TruCareKeystorePassword>` — Password for TruCare keystore
- `<keyPassword>` — Password to use to import the InterQual Connect™ keypair in TruCare keystore, by default the same as `TruCareKeystorePassword`
- `<TruCareKeystoreFile>` — TruCare keystore file, by default `TruCare.protected.keystore`
- `<iqConnectCertificateFile>` — InterQual Connect™ certificate file, typically with the extension `p12`
- `<iqConnectCertificatePassword>` — Password for the certificate file, by default the same as `TruCareKeystorePassword`

# Configure connection settings for MCG Chronic Care Guidelines

Configure connection settings for MCG Chronic Care Guidelines by editing credentials supplied by MCG Health.

Work with MCG Health to obtain the information you need to configure TruCare with MCG Chronic Care Guidelines.

- **Client ID**
  - **Client Key**
  - **URL** — The URL is the URL to use to access the guidelines from MCG. If there are questions regarding the correct URL, contact MCG for more information. An example of a URL is <https://cciservice.carewebqi.com>.
1. Click System Management → Third Party Configuration
  2. To edit the **MCG Chronic Care Guidelines** credentials, on the **MCG Chronic Care Guidelines** tab, click **Edit**.
  3. Set the **Client ID**.  
The Client ID can have a maximum length of 50 characters.
  4. Set the **Client Key**.  
The Client Key can have a maximum length of 150 characters.
  5. Set the **URL**.  
The URL can have a maximum length of 250 characters.
  6. Click **Submit**.

## Update MCG custom guidelines

After you upgrade TruCare , update your MCG custom guidelines.

After you upgrade TruCare , if you have custom MCG guidelines, you must update them after the upgrade is complete. You need to update your custom guidelines only once. You do not need to update them in future releases.



### Important

Custom MCG guidelines will continue to work only if you update them using this procedure.

1. After you complete your upgrade and update your URL, select System Management → Third Party Configuration.
2. On the MCG Chronic Care Guidelines tab, select **Update Custom MCG Guidelines**.  
The button remains enabled as the update occurs. When the process is complete, a message appears.

## Importing MCG Chronic Care Guidelines

Import the MCG Chronic Care Guidelines to make them available with specialty assessments.

You can import an MCG Chronic Care Guidelines content version only once. Confirm you have completed all your changes in MCG Content Authoring Tool before importing to TruCare. If you need to make further changes, you must copy the guidelines in MCG CAT as a new version. You then make your changes in the new version and import that new version of guidelines into TruCare.

**Note**

When creating custom MCG assessments, do not include line breaks in questions. Line breaks are not supported in TruCare assessments.

When importing custom MCG guidelines, the guidelines must have the following character restrictions. If the elements are over the length restriction on the name of the following MCG artifacts, an import error occurs.

The following MCG artifacts can have a maximum of 250 characters:

- Guideline
- Module
- Problem
- Goal
- Barrier

The following MCG artifacts can have a maximum of 2000 characters:

- Question
- Answer
- Intervention

MCG sub-interventions can have a maximum of 4000 characters. Even though MCG Content Authoring Tool (MCG CAT) allows you to create the sub-interventions without a length restriction, you must restrict your sub-interventions to 4000 characters.

Be aware of the following information when importing guidelines.

- Guidelines that are marked as high intensity are always correctly retrieved by TruCare. Custom MCG guidelines must contain questions in every section. If a high-intensity custom MCG guideline contains a section without at least one question and answer set, TruCare cannot import it.
- MCG guidelines that contain the Medlist question type are being phased out by MCG and are not supported by TruCare. You cannot import custom MCG guidelines that contain the Medlist question type and they appear in the error list when importing MCG guidelines.

## Import MCG guidelines

TruCare supports the use of MCG guidelines. To use MCG guidelines in TruCare, you must import them through TruCare Admin.

1. Click System Management → Third Party Configuration.
2. Ensure the **Connection Settings** section is completed and submitted.
3. Select the **Content Version** value from the drop-down list.

**Note**

If you import a content version and publish a new content version (major or minor) of a given assessment, any linked MCG assessments recommend the most recently published version in TruCare. For example, if you previously imported and published MCG "Alcohol Use (v21.0)", it would recommend "Alcohol Misuse (v21.1)" when you import and publish MCG content version 21.1.

Once you submit the **Connection Settings** and select the **Content Version**, the **Retrieve Guidelines** button is enabled.

4. Click **Retrieve Guidelines**.

A status message appears next to the button while retrieving the content, and a message indicates the success of the retrieval once the retrieval is complete. The content that is

retrieved populates the table below the search controls and contains the guidelines from MCG that correspond to the content version that was selected.

**Note**

By default, guidelines previously retrieved and imported are not shown in the table. Clear the **Hide imported guidelines** check box to view previously imported guidelines.

5. Search for a guideline.

**Note**

Custom guidelines created via MCG Content Authoring Tool (CAT) that do not contain questions are considered low-intensity guidelines. TruCare does not integrate with MCG low-intensity guidelines and they are not available for import.

6. Click **Import Guidelines**.

The time it takes to import the guidelines depends on the strength of the connection to the MCG server and the number of guidelines to be imported. The import can take approximately 30 minutes due to the amount of data being imported and the creation of database records.

7. Respond **Yes** to the confirmation message.

When you continue with the import, **Importing Guidelines** appears at the bottom of the screen, indicating that the import is in progress, and a **Loading** bar appears.

If the import is successful, **Import Successful** appears at the bottom of the screen.

If the import was successful, but there were individual guidelines for which the import failed, the **Import Complete with Errors** message opens. This window contains the following information for each of the guidelines that were not successfully imported:

- Guideline Name
- Guideline ID
- Version
- Details

To exit, click **OK**. The MCG guidelines that were not successfully imported are the only ones that are shown. Once the issues are resolved, you can run a new import.

Hover over the name, ID, or the **Details** message to view the associated tool tip.

If the **Detail** message is Import failure due to bad or duplicate guidelines, the associated guideline might fall into one of the following scenarios:

- Duplicate guideline
- Empty answers were found in the guideline
- An associated attribute in the guideline failed to import

If you attempt to import a sub-intervention that exceeds the character length restriction, the **Detail** message, Exceeds character limit for Sub-Interventions is shown with the sub-intervention. If any other artifact exceeds the character length restriction, the **Detail** message, One or more elements within the selected guideline exceeds character limits, is shown with the artifact.

If there is an error not covered by these messages, the **Detail** message, Import Error: please contact your system administrator appears.

After you import the MCG Chronic Care Guidelines, you must configure the guidelines in TruCare. See [Import MCG guidelines \[0 \]](#) for details.

## Search preview list for the MCG guidelines to import

Confirm that you are importing the correct content version by searching for specific guidelines and verifying that the guideline is listed.

All available MCG guidelines are imported during any particular import process.

1. Click System Management → Third Party Configuration
2. Ensure the **Connection Settings** section is completed and submitted.  
For more information on the connection settings, see [Configure connection settings for MCG Chronic Care Guidelines \[250\]](#).
3. Select the **Content Version** from the drop-down list. If there are questions regarding the correct software version contact MCG Health for more information.  
Once the **Client ID**, **Client Key**, and the **URL** are submitted and the **Content Version** is selected, the **Retrieve Guidelines** button is enabled.
4. Click **Retrieve Guidelines**.  
If the retrieval is successful, a message is shown. The guidelines that are retrieved populate the table in alphabetical order.
5. Select either **Starts With** or **Contains**. **Starts With** is selected by default. This selection is used with any information entered in the **Enter Guideline Name** field.
6. Clear or select the **Hide Imported Guidelines** check box to show or hide imported guidelines, respectively. The check box is selected by default.
7. Enter the name or partial name of the guidelines you want to use in your search in the **Enter Guideline Name** field. This is used in conjunction with the selection of **Starts With** or **Contains**.
8. To complete the search, click **Search**.

The guidelines that match your search criteria are shown.



### Note

There is no option to import individual guidelines. The Import button imports all un-imported content, regardless of whether or not it is present in the retrieval table based on a search.

## MCG guidelines report

You can generate a report that contains a list of all TruCare assessments that are linked to one or more MCG assessments. You can use this report for guidance to recreate links between TruCare assessments and a newer version of MCG Chronic Care Guidelines.

Zyter|TruCare recommends you generate this report before deactivating the guidelines from the selected content version. In this report, the following TruCare information is returned for each TruCare assessment that has been configured to trigger an MCG assessment.

- Assessment ID
- Assessment Type
- Status
- Ready to Export (Yes or No)
- Assessment name
- Question group name
- Question and associated answer
- Conditional Question and associated conditional question answer
- Name and version of the linked MCG assessment

The information above is shown for each answer set that contains a reference to an MCG assessment. Each set of information is sorted alphabetically.

The format of multi-select questions in the report is different from conditional logic questions. Multi-select questions are shown with the label followed by vertical check boxes, or a label, followed by three-column check boxes. Each answer choice is within its own box within the report and formatted as follows:

- Question Group
- Question Label
- Question Text
- MCG assessment

The report contains the following information:

- TruCare assessments linked with MCG assessments that are in the content version selected in the drop-down list
- BHP nodes and their associated MCG assessments that are in the content version selected in the drop-down list
- The Content Version

If there are no MCG assessments that are in the content version selected in the drop-down list linked to TruCare assessments, the following message is shown under the TruCare Assessments with Links to MCG assessments header.

No MCG assessments are linked to TruCare Assessments

If there are no BHP nodes configured with MCG assessments that are in the content version selected in the drop-down list, the following message is shown under the BHP Configuration header.

No BHP settings are configured for MCG assessments

The footer of the report includes the user name of the user who generated the report, the date and time the report was generated, and the page number.

If there are no links between TruCare assessments and MCG assessments, the report contains the following message:

No MCG assessments are linked to TruCare assessments.

## Generate a report of MCG guidelines

You can generate a report that contains a list of all TruCare assessments that are linked to one or more MCG assessments.

You can use this report for guidance to recreate links between TruCare assessments and a newer version of MCG Chronic Care Guidelines. It is recommended that this report is generated before deactivating the guidelines from the selected content version. In this report, the following TruCare information is returned for each TruCare assessment that has been configured to trigger an MCG assessment.

If there are no links between TruCare assessments and MCG assessments, the report contains the following message:

No MCG assessments are linked to TruCare assessments.

1. Click **System Management**.
2. On the left navigation pane, click **Third Party Configuration**.
3. Within the **MCG Chronic Care Guidelines** tab, click the **Deactivate** tab.
4. From the drop-down list, select the **Content Version** of the guideline you want to use in the report.

The **Content Version** drop-down list contains any of the versions of MCG guidelines that have been imported except the most recently released version. If there are no imported guidelines and if only one content version has been imported the drop-down list is empty.

If there are any imported minor content versions associated with the selected content version, any MCG assessments are included in the generated report.

The **Generate Report** and **Deactivate** buttons are enabled once the **Content Version** is selected.

5. Click **Generate Report**.

The PDF Viewer screen opens.

6. Use the PDF Viewer tools to navigate, save, and print the PDF.

## Deactivate MCG guidelines

The Deactivate section of the Third-Party Configuration section in the System Management module helps you to plan deactivating a content version.

MCG releases a new content version of their Chronic Care Guidelines annually. This new release must be manually imported and configured in TruCare Admin.

Zyter|TruCare recommends having only one version of MCG Chronic Care Guidelines active at a time.

Zyter|TruCare recommends generating the MCG Configuration Report prior to deactivating a content version. See [Generate a report of MCG guidelines \[254\]](#).

Any time after a new major content version has been imported from MCG, the previous content version can be deactivated from the Deactivate tab of the Third-Party Configuration section. Deactivating a select MCG content version completely removes the assessments from TruCare. In-progress assessments remain available until they are completed or they are voided. You cannot reverse deactivation. Zyter|TruCare recommends that you back up the Casenet database prior to deactivating a content version.

You can use the MCG Configuration Report for guidance in recreating links between TruCare assessments and a newer version of MCG Chronic Care Guidelines. The information in this report can also be used to remove obsolete assessments from the Customer Setup section under Differential Care Management and to reconfigure them to refer to the latest content versions.

The following artifacts can be deactivated from a specific content version.

- Assessments
- Care Plan Problems
- Care Plan Goals
- Care Plan Interventions
- Care Plan Barriers

Complete the following to deactivate artifacts for a specific content version.



## Note

Deactivating a content version permanently removes all of the assessments and care plan elements for that content version from TruCare. Deactivating a content version has the following results.

1. MCG assessments for the selected content version are no longer present in the assessment library in TruCare Admin.
2. Any assessments that are in progress can be completed but new assessments for that content version cannot be started.
3. Any care plan elements that are already in a care plan or a care plan builder remain but care plan elements from the deactivated content version are no longer available in the library.
4. Any existing tasks will point to the highest version of the associated MCG assessment definitions as published in TruCare Admin. This applies to both major and minor content versions. In-progress tasks open the associated in-progress assessment instance in TruCare, regardless of the published status of the assessment definition. If the associated assessment definition is deactivated and there is not a published assessment definition available, an error message appears in TruCare indicating the assessment definition is disabled when a user attempts to open a task associated with an MCG assessment instance.
5. If an assessment is in progress when a content version is deactivated, the recommended MCG care plan elements from the deactivated content version are still shown when the assessment is submitted. However, assessment recommendations for in-progress assessments are disabled and are not be shown. Allow enough time for your users to complete any in-progress assessments before deactivating the current MCG content version.
6. Permissions that had previously been configured for the deactivated content version are hidden from those roles. However, these roles retain their settings at the time of deactivation. This allows users to complete work on in-progress assessments remaining in their queues.

Ensure that a new MCG content version has been imported and configured before deactivating the previous content version.

## Deactivating MCG guidelines from a specific content version

MCG Health releases a new content version of their Chronic Care Guidelines annually. This new release must be manually imported and configured in TruCare Admin.

Before you begin this procedure:

- Generate a MCG guidelines report to identify what to reconfigure. See [Generate a report of MCG guidelines \[254\]](#).
- Remove the MCG assessment triggers or disable the TruCare assessments with MCG assessment triggers before disabling the content version.
- You must remove all MCG assessments from BHP nodes before the disabling the content version.
- Back up your Casenet database.

You must deactivate the previous content version. You can have only one active content version (including minor content versions) of MCG at a time in TruCare.

1. Click System Management → Third Party Configuration.
2. In the **MCG Chronic Care Guidelines** tab, click the **Deactivate** tab.
3. From the drop-down list, select the content version of the guidelines you want to deactivate.

The **Content Version** drop-down list contains any of the versions of MCG guidelines that have been imported except the most recently released version. If there are no imported guidelines and if only one content version has been imported, the drop-down list is empty.

The **Generate Report** and **Deactivate** buttons are enabled.

4. Create a report of all TruCare assessments that are linked to MCG assessments and all MCG assessments with a BHP configuration, by clicking **Generate Report**.

Generate a report before you attempt to deactivate a content version. For more information on generating the report, refer to [MCG guidelines report \[136\]](#).

The PDF Viewer screen opens.

5. To deactivate the guidelines for the indicated content version, click **Deactivate**.



### Warning

Deactivating the selected content version permanently removes all assessments and care plan elements for that version of MCG from TruCare. Any assessments and care plan elements for any associated minor content versions are also deactivated. Refer to the note in the related section for more information.

A warning message opens.

6. Click **Deactivate Anyway**.

A confirmation message opens.

7. Click **Yes**.

If any draft or published TruCare assessments are linked to any MCG assessments, an error message is shown, The selected content version cannot be deactivated because it is being used by TruCare assessments. You must either remove the MCG assessment triggers or disable the corresponding parent TruCare assessments. A list of TruCare assessments that are linked to the MCG assessments from the selected content version are shown.

If there are MCG assessments with BHP configurations, a second error message is shown, The selected content version cannot be deactivated because some assessments have settings configured in Differential Care Management > Customer Setup. Ensure to remove all BHP configuration settings using the generated report. You must remove all MCG assessments from BHP nodes before the disabling the content version.

8. To update the error messages and the list of linked assessments, click **Deactivate**, **Deactivate Anyway**, or **Yes** at any time.

When the error messages have been resolved, a loading bar is shown, "Deactivating Guidelines," next to the **Deactivate** button, and you cannot navigate away from the screen. On average, deactivating the guidelines can take less than 40 seconds.

When the operation is successful, all of the imported guidelines from the indicated content version are deactivated.

## MCG Content Version 29

TruCare users can select '29' as the content version on the '**Third Party Config**' screen to retrieve guidelines from MCG, including the Chronic Care Guidelines. The list of guidelines accurately displays the version as '29,' and users can import and manage MCG content from this version.



### Note

Content version '27' is not selectable, as focus remains on supported versions.

Content version '29' is fully integrated across administrative and client screens. Administrators can manage configurations through **TruAdmin > System Management > Content Version**. It appears in the **Assessments Library** (Version column and search criteria), **Previewer** (Assessment Header), **Assessment Editor** (Version field), and **DCM > Customer Setup > License Feature: CM** (Version selection column).

Version '29' is available in the **Assessment Summary** (Add Assessment drop-down and Recommended Assessments popup), **Care Plan Builder** (Assessment filter), and **Assessment PDFs**. These integrations ensure streamlined workflows and support for the latest content.

TruCare administrators can upgrade installations while preserving configurations, and TruClient users continue working with previously imported content from version '28' post-upgrade. This maintains compatibility and ensures uninterrupted functionality.

## Configure TruCare Collaborate settings

Configure the TruCare Collaborate URL so that users with the applicable permissions can open the TruCare Collaborate application from within TruCare to chat with members via chat message.

1. Click System Management → Third Party Configuration
2. On the **Collaborate** tab, click **Edit**.
3. Enter the **URL** for the TruCare Collaborate application. The URL is specific to your implementation/environment for TruCare Collaborate.

The URL can have a maximum length of 500 characters.

4. Click **Submit**.

## Configure FindHelp settings

Configure the settings needed to integrate with the findhelp Social Determinants of Health (SDoH) network.

Findhelp is a community-based, closed-loop referral network of verified social care organizations (such as Meals on Wheels). With this integration, you can select findhelp from the Resources icon when a member record is open. The findhelp site then opens within an iframe in TruCare where users can search for and select community-based programs that they can refer the member to.

- A valid SSL certification is required to configure the webhook connection to findhelp. Findhelp does not support self-signed certificates. TruCare needs to be SSL enabled with a purchased signed certificate.
- An HTTPS certificate must be in place as findhelp supports only an HTTPS URL.
- Domains for findhelp need to be whitelisted on your network so that users can access the findhelp functionality without error. See [Whitelisting domains for findhelp \[260\]](#).
  - To receive referral created/updated events from findhelp, the findhelp webhook endpoint "https://<HOST>:<PORT>/casenet-server/api/find-help/process-webhook" needs to be exposed publicly to the internet with HTTPS. Only that endpoint should be exposed publicly, and the source IP should be whitelisted.
  - To use the findhelp feature in Cloud deployments, your Amazon Web Services (AWS) static IP needs to be whitelisted so that your users can access the findhelp feature.
- If you configure Single Sign-On (SSO), users will not need to sign in to the findhelp site when they launch it from the Resources menu in TruCare. To configure SSO, see [Single Sign-On \[232\]](#). The following data needs to be added to the configuration file of the identity provider (such as Okta) for each TruCare user that will use SSO:

Attribute	Claim	Required for login
NameID*	GUID	Yes

Attribute	Claim	Required for login
Email	email	Yes
First name	givenname	Yes
Last name	surname	Yes

\* Either an email or a GUID is required in order to create an account. The GUID is a persistent ID passed as the NameID during the authentication request.



### Note

Nested groups are not currently supported. Any external groups passed via SSO are treated as a flat list (any nesting will be ignored).

- A new user created in TruCare Admin that includes the screen permissions listed below. This new user is used as the Webhook user - the user name and password that will be given to findhelp to authenticate with when sending back the findhelp referral updates. After you enter the user name in the **Webhook User** field on this screen (see Step 4 below), that user name is used for the **Created By** value of the note that is automatically generated in TruCare after you send a referral in findhelp. Only the Webhook user needs the permissions listed below. The Webhook user needs to be available in all environments that will use the findhelp integration.
    - CaseDetail - View
    - CaseAddScreen - View, Create
    - NoteCreateScreen - View, Create
    - MemberSummary - View
    - EligibilityBenefitSummary - View
  - Gather the following information from findhelp to complete this screen:
    - URL - URL of the findhelp system to use.
    - Secret Key - key used to authorize the API endpoint /find-help/process-webhook.
    - API user, key, URL, and password for the API fields on this screen (used to access the findhelp referral API).
    - Value for the **Prefix Whitelabel** field if provided by findhelp.
    - Value for the **Launch ID** field if provided by findhelp.
1. Click System Management → Third Party Configuration.
  2. On the **FindHelp Integration** tab, click **Edit**.
  3. Select the **FindHelp Settings** check box. This enables the rest of the fields. When this check box is selected and the required fields are populated correctly and submitted, findhelp will appear in the Resources list in TruCare. To remove findhelp from the Resources list, clear this check box.
  4. Complete the following fields:
    - **URL:** Type the URL for the findhelp application to be launched in the iframe in TruCare.
    - **Secret Key:** Type the key provided by findhelp that is used to authorize the API endpoint /find-help/process-webhook. The secret key is unique to each URL and is generated by the HMAC encryption method.
    - **Webhook User:** Type the user name that you created in TruCare Admin to have the required permissions (listed in the Prerequisites section above) that will be used for the Created By value of the note that is automatically generated in TruCare after you send a referral in findhelp. The Webhook user name and password will be given to findhelp to authenticate with when sending back the findhelp referral updates. If the user name is invalid, the error "Specified user could not be found" appears when you select Submit.
    - **API User:** Type the API user provided by findhelp for accessing the findhelp referral API.

- **API Key:** Type the API key provided by findhelp.
- **API Base URL:** Type the API URL provided by findhelp.
- **API Password:** Type the API password provided by findhelp.
- **Prefix Whitelabel:** Type the value provided by findhelp if applicable. If this field is populated, the value of this field is prefixed to the member first name that TruCare sends to findhelp. If this field is not populated, TruCare sends the member first name to findhelp without any prefix.
- **Launch ID:** Type the value provided by findhelp if applicable. If this field is populated, the value of this field is appended to the URL that TruCare uses to launch findhelp. If findhelp did not assign a launch ID to you, leave this field empty.
- **Allow users to receive TruCare notifications:** To enable messages to be generated and appear on the TruCare user's dashboard, select this check box. A message is generated when a referral is sent or updated in findhelp.

5. Click **Submit**.

## Whitelisting domains for findhelp

Findhelp relies on certain externally-hosted code libraries to deliver the functions of their applications. If your network policy blocks connections from your workstations to these libraries, certain functions on the findhelp website may not function as expected. Your findhelp users may experience error messages in their browser, in the Javascript console in your user's browser, or in the findhelp website itself.

To prevent errors, Findhelp recommends whitelisting (allowing your users to access over the internet) the following list of URLs and IP addresses. The URLs and IPs listed below need to be whitelisted for each client machine because the findhelp URL will be accessed via web browser from the client machines.



### Note

Items preceded by an asterisk (for example, \*.findhelp.com) represent a wildcard that allows access to subdomains within that domain (for example, subdomain.findhelp.com.)

Purpose	URL or IP
findhelp application (non-production)	*.findhelp-qa.com
findhelp application (production)	*.findhelp.com
Google APIs	*.google.com
Google APIs	*.googleapis.com
Google APIs dependency	*.gstatic.com
In-app reporting	*.periscopedata.com
Rollbar error logging	cdnjs.cloudflare.com/ajax/libs/rollbar.js
Rollbar error logging	api.rollbar.com
Webhook traffic (QA)	34.122.142.67
Webhook traffic (Production)	35.223.185.57

## Configure health literacy content for Healthwise

The Health Literacy Content section under Third-Party Configuration helps configuring the settings required to integrate Healthwise, so that users with the applicable permissions can access the Healthwise through TruCare client.

The Health Literacy Content tab in the TruCare Admin portal includes the following fields:

- Healthwise URL
- Client ID
- Client Secret Code
- Username
- Password
- Authorization URL

Perform the following steps in order to access the **Health Literacy Content** tab:

1. Login to TruCare Admin.
2. Click **System Management > Third Party Configuration**.
3. Click **Health Literacy Content** tab.



### Note

By default, the information under each field appears in view-only mode under the **Health Literacy Content** tab and the Cancel button is disabled.

4. To make changes, click Edit which also enables the Cancel button along with all the others fields and displays the existing information in each field.



### Note

- All the data is pre-set by Healthwise, and it is mandatory to fill in all required fields.
- If any field is left empty, then an error will prompt you to fill-in the details in the required field.
- If the **Healthwise** checkbox is disabled, then all fields will be in view only (disable) mode.

Additionally, if you uncheck the **Healthwise** checkbox and click Submit, then the **Healthwise** label and link would not show up for a member in the Member dashboard screen in TruCare.

## Configure AI Integration Settings

Administrators can configure TruCare to integrate with AI functionality, enabling or disabling AI-powered features across the system. This setting allows administrators to manage when AI features are active and control the user experience.

When AI integration is disabled, TruCare removes all AI-driven features, including prompts, responses, and interface elements. The Faxes screen reverts to its standard or split-page view. When administrators re-enable AI integration, TruCare restores access to AI features and prompts for the valid AI integration link before saving the configuration.

Before enabling AI integration, configure the required settings in the Admin Application under Third-party Integration

1. Navigate to **System Management → Third Party Configuration**.
2. Under the **Third-party Integration** tab, locate the setting labelled **AI Integration: On/Off**.
3. Toggle the setting to **On** to enable AI functionality.

When enabling AI integration:

- Enter the AI Integration Link when prompted (To obtain the link, Contact your account manager or client success team.)
- TruCare prevents submission of the screen unless a valid link is provided.
- A visual confirmation, such as a success message or status indicator, confirms the update.

Only users with appropriate permissions can access and modify this setting. If they do not have permission to access the Third-party Integration tab, the AI Integration setting remains hidden and inaccessible.

**Note**

If AI integration is turned **On** without entering a valid link, the system prompts for the link and prevents further actions until the field is completed.

For more information about required permissions, see the TruCare Administration Guide.

## Accessing FindHelp URL

In TruCare the following steps will help access the FindHelp URL:

1. Login to TruCare with valid credentials.
2. Select the member.
3. Launch **FindHelp** from the **Resources** menu and select the required details on case popup.
  - Select the **Use cross-walk configuration** checkbox in the Admin portal to retrieve the **FindHelp** URL for the member's BHP from the cross-walk, allowing the FindHelp application to launch within the TruCare iFrame.

**Note**

If the **Use cross-walk configuration** checkbox is not selected, the default **FindHelp** settings will apply to all members' BHPs. If a member's BHP is not defined in the cross-walk table, an error popup message is displayed.

4. Create a referral from FindHelp application.

**Note**

**FindHelp** sends the webhook event to TruCare API. Based on the launch information from Step 3, TruCare API will create the **FindHelp** note and case calling the **FindHelp** API's.

5. Go to member notes and check for **FindHelp** note and review the referral information.

# Auditing

**Auditing:** The Auditing component enables Admin users to audit logs by user or by member within TruCare.

**Note**

When you return to a summary screen after viewing or editing an artifact, the system does not record it as a screen transaction.

If a user's name changes in LDAP, the audit logs still show all actions the user performed under both the old and new names. The Username at the time column displays the user name as it appeared when the action occurred.

**Note**

The system applies role permissions and member filter groups when you view auditing logs.

## Logs by User

To view the Logs by User

1. Navigate to Auditing > Logs by User.
2. Click User Lookup.  
The User Search pane is displayed.
3. Select the appropriate User Name and User Type.
4. Click Submit.
5. Select the From Date and To Date and click Search.  
The Logs by User summary is displayed.

## Logs by Member

To view the Logs by Member

1. Navigate to Auditing > Logs by Member.
2. Click Member Lookup.  
The Member Search pane is displayed.
3. Select the appropriate User Name and click Submit.
4. Select the User Type.
5. Select the From Date and To Date and click Search.  
The Logs by Member summary is displayed.

## HTML5 Logs by User

To view the HTML5 Logs by User

1. Navigate to Auditing > HTML5 Logs by User.
2. Click User Lookup.  
The User Search pane is displayed.
3. Select the appropriate User Name and click Submit.
4. Select the From Date and To Date and click Search.  
The HTML5 Logs by User and the Activity summary are displayed.

# HTML5 Logs by Member

To view the HTML5 Logs by Member

1. Navigate to Auditing > HTML5 Logs by Member.
2. Click Member Lookup.  
The Member Search pane is displayed.
3. Select the appropriate User Name and click Submit.
4. Select the From Date and To Date and click Search.  
The HTML5 Logs by Member summary is displayed.

# Provider Management

## Provider Search Settings

Configure the fields used for simple provider searches to reduce the number of search fields displayed. By limiting the visible fields, you help users focus on the ones they use most often to search for a provider.

Even after you configure simple search fields, users can still access all search fields by clearing the Simple Search checkbox on the lookup panel in TruCare.

To configure Provider Search Settings

1. Navigate to Provider Management > Provider Search Settings  
The Provider Search Settings page is displayed.
2. Click Edit in the appropriate section and update the required settings.
3. Click Submit.  
A Provider search configuration changed successfully message is displayed.

# Import Configuration

## Integration Export Configuration

To view the Integration Export Configuration

1. Navigate to IMEX > Export Configuration.
2. Click Integration.

The Export Database Location displays the Logs.

## Export the Integration data

To export the Integration data

1. Navigate to IMEX > Export Configuration.
2. Click Integration.
3. Click Save DB Location and select the appropriate Export Database Location.
4. Click Export.

A confirmation message is displayed.

5. Click Yes.

The export data is saved in the selected Export Database Location.

## Import the Integration Configuration

To import the Integration Configuration

1. Navigate to IMEX > Import Configuration.
2. Click Integration.
3. Click Save File Location and select the appropriate Import File Location.
4. Click Import.

A confirmation message is displayed.

5. Click Yes.

The Application Logs are imported successfully.

# Export Configuration

## Application Configuration

To view the Export Application Configuration

1. Navigate to IMEX > Export Configuration.
2. Click Application.

The Application Log summary page is displayed.

## Export the Application Configuration

To export the Application Configuration

1. Navigate to IMEX > Export Configuration.
2. Click Application.
3. Click Save File Location and select the appropriate Export DB Location.
4. Click Export.

A confirmation message is displayed.

**5. Click Yes.**

The export data is saved in the selected Export Database Location.

## Import the Application Configuration

To import the Application Configuration

1. Navigate to IMEX > Import Configuration.
2. Click Application.
3. Click Save File Location and select the appropriate Import File Location.
4. Click Import.

The Application Logs are imported successfully.

# Standard and performance logging

This appendix covers standard server- and client-side logging as well as performance logging.

## Overview

You can use the logging capabilities provided by TruCare to diagnose and troubleshoot problems and performance issues.

TruCare uses the Simple Logging Facade for Java (`slf4j`), which is a simple abstraction for logging utilities such as Logback to log messages for Standard Logging.

To log messages about performance, TruCare performance logging, monitoring, and analysis library for Java that readily integrates with `slf4j` and Logback.

For more information on Logback, refer to the [ ] Technical Reference Guide.

## Logging types

TruCare provides three types of logging.

- **Standard Server-Side Logging** — Logs messages included in the server-side code and library code about server-side processes.
- **Standard Client-Side Logging** — Logs messages included in the client-side code about client-side processes.
- **Performance Logging** — Logs messages about the duration of specific processes for the client and server.

## Log level thresholds

You can set log level thresholds for standard logging for the server and clients to one of five settings, listed from least serious but most common to most serious, least common.

For performance logging you can define what the log level threshold means in the context of performance logging.

For more information about defining Log Level Thresholds, refer to [Enable and configure performance logging \[272\]](#).

The table shows the available log level thresholds and actions.

**Table 27. Log Level Thresholds and Actions**

Log level threshold	Action
DEBUG	Enabled the least serious but most common messages to be logged. Enables DEBUG, INFO, WARN, ERROR, and FATAL messages.
INFO	Enables INFO, WARN, ERROR, and FATAL messages.
WARN	Enables WARN, ERROR, and FATAL messages.
ERROR	Enables ERROR and FATAL messages.
FATAL	Enables the most serious but least common message to be logged. Enables FATAL messages only.



### Note

The server-side Log Level Threshold must be set to the same level or a lower level as the client Log Level Threshold. Otherwise, messages are passed to the server, but they are not logged to the console or the log file.

# Standard server-side logging

Log messages included in the server-side code and library code about server-side processes.

By default, standard log messages for the server side are sent to the `server.log` file located in the directory: `C:\[TruCareServer]\TruCare\apache-tomcat\logs`

The default value for the Log Level Threshold is **INFO**, but you can set the value to your preferred level.

## Set the log level threshold for the server side

You must repeat this process each time that Tomcat is restarted.

1. Stop the TruCare application server service.
2. Locate the configuration directory.

The default directory is: `C:\[TruCareServer]\TruCare\apache-tomcat\lib`.

3. Locate the `logback.xml` file and open it.
4. Locate the section, under the comment `server.log`.

Note the parameters:

```
<filter class="ch.qos.logback.classic.filter.ThresholdFilter">
    <level>INFO</level>
</filter>
```

5. Set **level** to your preferred level.
6. Set "Threshold" to your preferred level.

This is the number of `server.log` files to create before overwriting them, and sets the Log Level Threshold.

# Standard client-side logging

Log messages included in the client-side code about client-side processes.

By default, standard log messages for TruCare are sent to the `server.log` file, located in the directory: `C:\[TruCareServer]\TruCare\apache-tomcat\logs`.

The default value for the Log Level Threshold is **INFO**, but you can set the value to your preferred level.

When you set the Log Level Threshold for TruCare, be sure to set it to the same level or higher as is set for the server. If you do not do this, messages are passed to the server but not logged to the `server.log` file.

## Set the log level threshold for the client side

Each time Tomcat is restarted, you must reset the Log Level Threshold because the threshold reverts to the default value of **INFO**.

1. Go to `[javafolder]\bin` where `[javafolder]` is the location of the Java instance installed on your computer.
2. Run the following command: `jconsole.exe`

You are shown the **JConsole: New Connection** screen of the JConsole.

- Select **Remote Process** and type `[hostname]:[port]`
  - `[hostname]` is the name of your computer
  - `[port]` is the value set in the variable `JMX_REMOTE_PORT` in the `setenv.bat` file located at `[TruCareServer]\TruCare\apache-tomcat\bin`. Typically, the port is set to 8090.

3. In the **Username** field, enter: `controlRole`

4. In the **Password** field, enter the password that was supplied on the **JConsole Security** panel during the installation or upgrade.
5. Click **Connect**.
6. Under the **MBeans** tab, click to expand the bean container and navigate to the **Casenet/TruCare** folder.
7. Click to expand **remoteClientLogger**, then click **Attributes**.
8. To change the **ClientLogLevelThreshold** attribute value, click the **Value** field.
9. Type the new threshold value, then click **Refresh**.

## Performance logging

Log messages about the duration of specific processes for the client and server.

Performance logging records messages about the performance of TruCare server and TruCare processes. However, messages about TruCare Admin process are not logged.

Although performance logging is not enabled when it is first installed, you can enable it for the server and for TruCare.

## Processes monitored

Performance logging primarily measures the durations for processes and sub-processes.

- For the server, you can collect data about the length of time for all server service methods called by TruCare.
- For TruCare, you can collect data about the durations for:
  - Loading screens
  - Submitting screens
  - Saving screens
  - Voiding screens
- For loading a screen, data is sent when TruCare opens a screen. In the other three processes, data is sent when TruCare closes a screen. The underlying screens are rendered when a response is returned.

Logging messages are sent only for member-specific screens, which work in TruCare. For example, logging messages are not sent for screens that are access from **Provider**, **Authorization Search**, or **Resources** links on the TruCare Menu Bar of the TruCare application.

## Steps and phases

Performance logging provides information for two phases and one sub-phase. This table shows additional detail of the discrete steps that make up these phases.

- Server Call phase
- Render phase
- Server-Side Service Method sub-phase

The table identifies the monitored steps, main phases, and minor processes.

Monitored step	Main phase	Minor processes
Server Call Phase	No sub-phase	1. TruCare code executes and initiates a server call.
		2. <sup>1</sup> Flex framework code and GraniteDS, which serializes instances into AMF, prepare a request and pass it to Flash Player and the browser.
		3. The browser dispatches the request.

Monitored step	Main phase	Minor processes
		4. The request travels over the network to the server.
		5. The server receives the message and GraniteDS deserializes AMF.
	Server-Side method sub-phase	6. The Server-side Service Method processes the request.
	No sub-phase	7. The server code and GraniteDS serialize and dispatch the response.
		8. The response travels over the network to the client.
		9. The browser and Flash Player pass the response into Flex framework code.
		10. Flex framework code and GraniteDS receive and deserialize the response.
		11. TruCare code initiates screen rendering.
Render Phase	No sub-phase	12. Flex framework and Flash Player show a screen.
		13. Flex framework and Flash Player implement interactivity in the screen. This step <b>is not</b> measured.

<sup>1</sup> For the load a screen process, there are some cases where screens are loaded and no calls are made to the server, that is, steps 2 through 10 do not occur.

## Server call phase

The server call phase consists of steps 1 through 11.

It sends log messages to the following log files located in the following directory: C:\[TruCareServer]\TruCare\apache-tomcat\logs.

- TruCare\_client\_performance.log
- TruCare\_server\_performance.log

Performance logging measures the duration between these steps. It starts measuring close to the beginning of step 1 and finishes the measurement close to the end of step 11. In effect, this measures the time period from user action to the beginning of the rendering phase.

Although this phase is identified as the Server Call phase, it does include client-side processing in steps 1, 2, 9, 10, and 11.

## Render phase

The render phase consists of steps 12 and 13.

It sends log messages to the following files located in the following directory: C:\[TruCareServer]\TruCare\apache-tomcat\logs.

- TruCare\_client\_performance.log
- TruCare\_client\_performance\_info.log

This phase is difficult to measure because Flex and Flash Player do not send clear signals that indicate when rendering is complete.

Although Performance Logging can measure step 12, it cannot do so for step 13. As a result, when Performance Logging reports on the duration of the Render phase, it measures the duration until the screen appears but is not interactive. Since step 13 can take multiple seconds on a slow machine, this is an important distinction.

Because these measurements are approximate, reported data uses terminology such as *possible render phase duration* rather than *render phase duration*.

## Server-side service method sub-phase

In addition to measuring the duration of steps in the two main phases, performance logging measures execution time for the server-side service method sub-phase in step 6.

Log messages are sent to the file `TruCare_server_performance.log` located in the following directory: `C:\[TruCareServer]\TruCare\apache-tomcat\logs`

## Enable and configure performance logging

Take this information into account when enabling and configuring performance logging.

- You must enable performance logging on the server side to activate performance logging for service methods called by the client.
- You must configure performance logging for both the server and client to enable client-side performance logging.
- You can enable the client side for all clients or for individual clients.

You define parameters for performance logging so that certain conditions are considered to be **INFO**, **WARN**, or **ERROR** conditions, and are logged as such. For example, you can configure performance logging so that if the Render phase takes longer than two seconds, it is considered to be an **INFO** condition.

## Enable and configure the server side

Because performance logging is not enabled when TruCare is installed, you must enable and configure it.

You can enable performance logging and set parameters for it on the server side by modifying the `logback.xml` configuration file, located in the directory `C:\[TruCareServer]\TruCare\apache-tomcat\lib`

The default Log Level Threshold for the server side is **INFO**. We recommend preserving this setting.

Enabling server-side performance logging is a prerequisite for client-side performance logging.

## Set parameters for the server side

You must repeat this process each time that Tomcat is restarted.

1. Go to the directory, `C:\[TruCareServer]\TruCare\apache-tomcat\lib`
2. Locate and open the `logback.xml` file.
3. Go to the Performance Logging Configuration section.
4. Execute the following to enable performance logging:

```
<!-- Server-Side Perf Logging (which is also needed in order for
client-side PerfLogging to work) -->
<logger name="com.casenet.aspect.performance.TimingAspect"
level="INFO" additivity="false">
  <appender-ref ref="serverPerfFileAppender"/>
</logger>
```

The default **Log Level Threshold** for the server side is **INFO**.

5. Edit the file for your preferred values.
6. Save the `logback.xml` file.
7. Restart Tomcat to activate your changes.

## Enable and configure the client side: all clients

This section covers how to enable and configure for the client side for all clients.

The default Log Level Threshold for the client-side is **INFO**. We recommend preserving this setting.

## Prerequisites

Before you can enable and configure the client-side for performance logging, be sure that:

- Server-side performance logging is enabled.
- Log Level Threshold is set to the preferred level for standard logging on the client side.

Performance logging conditions are logged only if the Log Level Threshold for the client side is set at or below the condition's level. For example, if client-side logging is set to the **ERROR** level, performance logging occurs for **ERROR** conditions, but not for **WARN** and **INFO** conditions.

## Set parameters for all clients

You set the parameters to enable performance logging and to define Log Level Thresholds on the client side in the JConsole.

You must repeat this process each time that Tomcat is restarted.





### Note

For these settings to take effect, users who are currently running TruCare must log out and log back in.

1. Go to [javafolder]\bin, where [javafolder] is the location of the Java instance installed on your computer.
2. Run the following command: `jconsole.exe`  
You are shown the **JConsole: New Connection** screen of the JConsole.
  - Select **Remote Process** and type [hostname]:[port] where
    - [hostname] is the name of your computer
    - [port] is the value set in the variable `JMX_REMOTE_PORT` in the `setenv.bat` file, located at [TruCareServer]\TruCare\apache-tomcat\bin. Typically, the port is set to 8090.
3. In the **Username** field, type `controlRole`
4. In the **Password** field, type the password that was supplied on the **JConsole Security** panel during the installation or upgrade.
5. Click **Connect**.
6. Under the **MBeans** tab, expand bean container.
7. Expand **remotePerformanceLogger**, click to **Attributes**.  
You are shown a **JConsole View** screen with a list of MBean Attribute values section that lists the parameters that are used to enable performance logging and to define the Log Threshold Levels.
8. Modify the necessary settings.
9. Click **Refresh**.
10. Close the JConsole.

Users who logged out of TruCare can log back in. The changed settings take effect.

# JMX parameters to enable performance logging: all clients

Parameter	Default value	Recommended value
LoadLoggingEnabled	False	True, if you want to log data for screen load processes. Enables logging for the Server Call Phase and makes it possible to add Render phase logging.
LoadRenderLoggingEnabled	False	True, if you want to log Render Phase data for screen load processes.  <div>  <b>Note</b>  LoadTimeLoggingEnabled must also be set to True for this to work. </div>
SubmitSaveVoidLoggingEnabled	False	True, if you want to log data for submit, save, and void processes. Enables logging for the Server Call Phase and makes it possible to add Render phase logging.
SubmitSaveVoidRenderLoggingEnabled	False	True, if you want to log Render phase data for submit, save, and void processes.  <div>  <b>Note</b>  SubmitSaveVoidTimeLogging Enabled must also be set to True for this setting to work. </div>
1 ScreenPerformanceErrorThresholdRenderPhase	12000ms	Minimum number of elapsed milliseconds that must be exceeded for the Render phase to reach the ERROR log threshold level.
1 ScreenPerformanceErrorThresholdServerCallPhase	12000ms	Minimum number of elapsed milliseconds that must be exceeded for the Server Call phase to reach the ERROR log threshold level.
1 ScreenPerformanceInfoThresholdRenderPhase	2000ms	Minimum number of elapsed milliseconds that must be exceeded for the Render phase to reach the INFO log threshold level.
1 ScreenPerformanceInfoThresholdServerCallPhase	2000ms	Minimum number of elapsed milliseconds that must be exceeded for the Server Call phase to reach the INFO log threshold level.
1 ScreenPerformanceWarningThresholdRenderPhase	5000ms	Minimum number of elapsed milliseconds that must be exceeded for the Render phase to reach the WARNING log threshold level.

Parameter	Default value	Recommended value
1 ScreenPerformanceWarningThresholdServerCallPhase	5000ms	Minimum number of elapsed milliseconds that must be exceeded for the Server Call phase to reach the WARNING log threshold level.

<sup>1</sup>These settings determine how performance logging defines **INFO**, **WARN**, and **ERROR** levels for the Server Call and Render phases. For each setting, specify the minimum number of elapsed milliseconds that must be exceeded for the phase to reach the Log Level Threshold. For example, if you set ScreenPerformanceErrorThresholdRenderPhase to 12000ms, any processes with a Render phase taking more than 12 seconds is considered an **ERROR**. If you set it to 0, all Render phases are considered **ERROR**.

## Enable and configure the client side: individual clients

If you want to enable performance logging for some but not all clients, you can enable individual clients.

You can do so by adding URL parameters to the TruCare URL for each client you want to enable performance logging.



### Note

If you try to add URL parameters while a user is logged in to TruCare, the user is automatically logged out.

By default, performance logging is not enabled for individual clients and there is no default value for the Log Level Threshold.

## Prerequisites

Before you can enable and configure the client side for Performance Logging for an individual client, be sure that:

- Server-side performance logging is enabled.
- Log Level Threshold for standard logging on the client side is set to **INFO** or lower.

Performance logging conditions are logged only if the Log Level Threshold for the client side is set at or below the condition's level. For example, if client-side logging is set to the **ERROR** level, performance logging occurs for **ERROR** conditions, but not for **WARN** and **INFO** conditions.

## Set URL parameters for an individual client

1. Go to `http://[TruCareServer]:8080/casenet-server/client.html` where `[TruCareServer]` is the location of the TruCare application.
2. In the URL box at the end of the URL (`http://[TruCareServer]:8080/casenet-server/client.html`), type the following:

```
?perfLogging_Enabled_Full=true&?perfLogging_TimeoutSeconds=8&?perfLogging_InfoThreshold=2000
```

3. Press **Enter**.

The performance logging settings take effect for the user for whom you made the changes. The user can log back in to TruCare.

4. Create a bookmark for the modified URL for easy access.

## Parameters to enable performance logging: individual client

The table shows the URL parameters used to enable performance logging and to define the timeout period and the INFO threshold.

**Table 28. Parameters to enable performance logging: individual client**

URL parameter	Definition
perfLogging_Enabled_Full	Set to True to enable performance logging for client.
perfLogging_TimeoutSeconds	The standard performance logging timeout period is 20 seconds. Set to the number of seconds preferred, not milliseconds.
perfLogging_InfoThreshold	Use this parameter to change the <b>INFO</b> threshold from its default of 2000, or from whatever value you specified in the JConsole. For example, if you want all processes logged, set this to 0. Set the number of milliseconds preferred, not seconds.

## Performance logging files

Performance logging creates three log files and one report file.

This files are located in the directory `C:\[TruCareServer]\TruCare\apache-tomcat\logs`

- `TruCare_server_performance.log`
- `TruCare_client_performance.log`
- `TruCare_client_performance_info.log`
- `perfStats.log`

The data from the `TruCare_server_performance.log` and `TruCare_client_performance.log` files is used to create a human-readable report in the `perfStats.log` file.

The data in the `TruCare_client_performance_info.log` file is human readable.

## TruCare\_server\_performance.log

This file contains data logged for server-side service methods. The format of the file can be configured in the `logback.xml` file.

The table shows the terms and definitions used in the `C:\[TruCareServer]\TruCare\apache-tomcat\logs\TruCare_server_performance.log` file.

**Table 29. Terms and definitions for TruCare\_server\_performance.log**

Term	Definition
sessionId	Session ID that is maintained by the server for the user's session from log in to log out.
start	Time at which the method was called, in epoch time.
time	Number of milliseconds for the method to execute.
message	Text indicating the service and service method that were called.
sessionId start date and time at the beginning of each line	Relates this data to other data associated with the same process in <code>TruCare_client_performance.log</code> and <code>TruCare_client_performance_info.log</code>

## File Excerpt: TruCare\_server\_performance.log

This excerpt shows a single logged line, divided into multiple rows for clarity.



## Note

The four pieces of data at the end of the line—start, time, tag, and message—are Perf4J information. All preceding text in the line is standard logging data.

```
2011-09-12 17:06:36,007
INFO
sessionId=161BF164F5F7171ED7AD02455EFF93AC
memberId=
screenName=
user=dev ipAddress=127.0.0.1
reqID=3
destination=systemInformationService
operation=getSystemInformation
start[1315861595976]
time[31]
tag[getSystemInformation]
message[SystemInformationService.getSystemInformation(...)]
```

## TruCare\_client\_performance.log

This file contains data sent by the client relating to the Server Call and Render phases.

The following shows the terms and definitions used in the **C:\[TruCareServer]  
\TruCare\apache-tomcat\logs\TruCare\_client\_performance.log** file.



## Note

Lines typically come in pairs.

**Table 30. Terms and definitions for TruCare\_client\_performance.log**

Term	Definition
sessionId	Session ID that is maintained by the server for the user's session from log in to log out.
start	Time when the phase started in epoch time.
time	Depends on the phase that is logged. <ul style="list-style-type: none"> <li>In Line 1, Server Call phase, time is the duration of the phase.</li> <li>In Line 2, Render phase, time is an estimate of the number of milliseconds for the Render phase to execute; this is also known as the possible render duration. This measurement include the becoming visible stage of the render process but not the becoming interactive state.</li> </ul>
tag	Includes: <ul style="list-style-type: none"> <li>Screen being loaded or submitted.</li> <li>Process type, such as Load, Submit, Save, or Void.</li> <li>Phase: Server Call or Render.</li> <li>User name.</li> </ul>
message	Includes: <ul style="list-style-type: none"> <li>Unique process ID (GUID) for the processing being logged, which is the same for both phases. This ID can also be used to correlate data logged in this file with the more detailed data logged in the TruCare_client_performance_info.log file.</li> <li>Memory allocated to TruCare.</li> </ul>

## File Excerpt: TruCare\_client\_performance.log

This excerpt shows two logged lines, with each line divided into multiple lines for clarity.

- Line 1 contains logged information about the Server Call phase for a process.
- Line 2 contains logged information about the Render phase for the same process.



### Note

Lines typically come in pairs. The four pieces of data at the end of each line—start, time, tag, and message are performance logging information. All preceding text in the line is standard logging data.

#### Line 1: Logged Data about the Server Call Phase

```
2011-09-12
17:06:47,898
INFO
sessionId=161BF164F5F7171ED7AD02455EFF93AC user=dev
ipAddress=127.0.0.1
reqID=17
destination=remotePerformanceLoggerService
operation=submitLoadServerPhaseLoggingInfo
start[1315861605538]
time[1813]
tag[DemographicsScreen.LOAD.SERVER.dev] message[C81AE44A-EE97-1EEF-
E6BE-5F76ACA2BC00,1937408]
```

#### Line 2: Logged Data About the Render Phase

```
2011-09-12
17:06:50,570
INFO
sessionId=161BF164F5F7171ED7AD02455EFF93AC user=dev
ipAddress=127.0.0.1
reqID=18
destination=remotePerformanceLoggerService
operation=submitLoadRenderPhaseLoggingInfo
start[1315861605539]
time[1344]
tag[DemographicsScreen.LOAD.RENDER.dev] message[C81AE44A-EE97-1EEF-
E6BE-5F76ACA2BC00,12111872]
```

## Technical Notes

The files `TruCare_client_performance.log` and `TruCare_client_performance_info.log` store the messages related to the Flex client. The timing information in the `TruCare_client_performance.log` file is used to create performance statistics.

Two files are created for the Flex client log because of the uncertainty of when a screen stops rendering. The following process occurs to estimate this:

1. When the Server Call phase completes:
  - a. Data related to the phase is sent to the server for logging.
  - b. Data is also remembered so that it can be accounted for in step 2.
2. When the Render phase completes:
  - a. The code compares and evaluates duration for this phase to the remembered data in Step 1b.

- b. Render phase data is sent to the server log for logging.
  - c. The Flex client sends a message to the logger.
  - d. The server-side call and screen rendering action store timing information in the log.
3. To further evaluate the details of screen rendering, the Flex client sends detailed human readable information about the call to the logger.
4. The logger then records this detailed message into a separate file, `TruCare_client_performance_info.log`.

## File Excerpt: `TruCare_client_performance.log`

This excerpt shows two logged lines, with each line divided into multiple lines for clarity.

- Line 1 contains logged information about the Server Call phase for a process.
- Line 2 contains logged information about the Render phase for the same process.



### Note

Lines typically come in pairs. The four pieces of data at the end of each line—start, time, tag, and message are performance logging information. All preceding text in the line is standard logging data.

#### Line 1: Logged Data about the Server Call Phase

```
2011-09-12
17:06:47,898
INFO
sessionId=161BF164F5F7171ED7AD02455EFF93AC user=dev
ipAddress=127.0.0.1
reqID=17
destination=remotePerformanceLoggerService
operation=submitLoadServerPhaseLoggingInfo
start[1315861605538]
time[1813]
tag[DemographicsScreen.LOAD.SERVER.dev] message[C81AE44A-EE97-1EEF-
E6BE-5F76ACA2BC00,1937408]
```

#### Line 2: Logged Data About the Render Phase

```
2011-09-12
17:06:50,570
INFO
sessionId=161BF164F5F7171ED7AD02455EFF93AC user=dev
ipAddress=127.0.0.1
reqID=18
destination=remotePerformanceLoggerService
operation=submitLoadRenderPhaseLoggingInfo
start[1315861605539]
time[1344]
tag[DemographicsScreen.LOAD.RENDER.dev] message[C81AE44A-EE97-1EEF-
E6BE-5F76ACA2BC00,12111872]
```

## Technical Notes

The files `TruCare_client_performance.log` and `TruCare_client_performance_info.log` store the messages related to the Flex client. The timing information in the `TruCare_client_performance.log` file is used to create performance statistics.

Two files are created for the Flex client log because of the uncertainty of when a screen stops rendering. The following process occurs to estimate this:

1. When the Server Call phase completes:
  - a. Data related to the phase is sent to the server for logging.
  - b. Data is also remembered so that it can be accounted for in step 2.
2. When the Render phase completes:
  - a. The code compares and evaluates duration for this phase to the remembered data in Step 1b.
  - b. Render phase data is sent to the server log for logging.
  - c. The Flex client sends a message to the logger.
  - d. The server-side call and screen rendering action store timing information in the log.
3. To further evaluate the details of screen rendering, the Flex client sends detailed human readable information about the call to the logger.
4. The logger then records this detailed message into a separate file, `TruCare_client_performance_info.log`.

## perfStats.log

The `C:\[TruCareServer]\TruCare\apache-tomcat\logs\perfStats.log` file contains statistical data gathered from the `TruCare_server_performance.log` and `TruCare_client_performance.log` files. By default, this data is logged every 10 seconds. The data includes the average, minimum, maximum, and standard deviation of the duration for the functions logged. The data in this file is human readable and is located in the directory, `C:\[TruCareServer]\TruCare\apache-tomcat\logs`.

Sample `perfStats.log`:

```
Performance Statistics 2011-09-12 17:06:30 - 2011-09-12 17:06:40
Tag Avg(ms) Min Max Std Dev
afterLogin 0.0 0 0 0.0
boardMessageSearch 15.0 15 15 0.0
checkTimeout 16.0 16 16 0.0
getCaseLoadSummary 0.0 0 0 0.0
getEventsForUser 16.0 16 16 0.0
getHolidays 16.0 16 16 0.0
getMemberLiteList 55.0 0 110 55.0
getMenuConfiguration 47.0 47 47 0.0
getMyClaimQueues 31.0 31 31 0.0
getMyTeams 15.0 15 15 0.0
getNextSystemMessage 0.0 0 0 0.0
getResourceMaps 360.0 360 360 0.0
getSystemInformation 31.0 31 31 0.0
getUserAvailableTimes 0.0 0 0 0.0
getUserBatchFaxRideRequestAccess 15.0 15 15 0.0
getUserPreferences 31.0 31 31 0.0
getUserTimeTrackingAccess 16.0 16 16 0.0
hasTaskCloseAndEndWorkflowPermission 16.0 16 16 0.0
loadUIConfig 15.0 15 15 0.0
taskSearch 218.0 218 218 0.0

Performance Statistics 2011-09-12 17:06:40 - 2011-09-12 17:06:50
Tag Avg(ms) Min Max Std Dev
DemographicsScreen.LOAD.RENDER.dev 1344.0 1344 1344 0.0
DemographicsScreen.LOAD.SERVER.dev 1813.0 1813 1813 0.0
addToUserPreferencesMemberListStateActiveMembers 16.0 16 16 0.0
filterMemberScreensForCurrentUser 47.0 47 47 0.0
findAllergiesByMemberId 7.5 0 15 7.5
findDiagnosesByMemberId 0.0 0 0 0.0
findEligibilitiesByMemberId 15.0 15 15 0.0
findMedicationsByMemberId 0.0 0 0 0.0
findMemberRelationships 47.0 47 47 0.0
findOpenTasksForScreen 16.0 16 16 0.0
findReferralsByMemberId 71.0 63 79 8.0
getAllMemberSummaryPodsForCurrentUser 47.0 47 47 0.0
getAuthorizationLitesByMemberId 16.0 16 16 0.0
getMemberLiteList 0.0 0 0 0.0
getMergeHistory 0.0 0 0 0.0
getSimpleMemberDto 140.0 140 140 0.0
isMemberEligible 16.0 16 16 0.0
load 1671.0 1671 1671 0.0
```

## TruCare\_client\_performance\_info.log

The `C:\[TruCareServer]\TruCare\apache-tomcat\logs\truCare_client_performance_info.log` file is in human-readable format and uses abbreviations to minimize the amount of data sent to the server.

## File Excerpt: TruCare\_client\_performance\_info.log

The most useful data for diagnosing performance problems is in the overview (Ovrvw) block at the top of this sample file and is marked with three asterisks.



### Note

Comments are not in a normal file but added here for clarity. One line comments are preceded by two forward slashes (//).

### C:\[TruCareServer]\TruCare\apache-tomcat\logs\truicare\_client\_performance\_info.log

```
// The following eight lines make up one line but are divided for
clarity.
2011-09-12 17:06:50,570 WARN
sessionId=161BF164F7171ED7AD02455EFF93AC memberId=
screenName=
user=dev
ipAddress=127.0.0.1
reqID=91
destination=remotePerformanceLoggerService
operation=submitLoadRenderPhaseLoggingInfo C81AE44A-EE97-1EEF-
E6BE-5F76ACA2BC00
// *** Unique process ID (GUID)
// Detailed Performance Logging info starts here
// Note that it's broken up into blocks, in this case Ovrvw, // //
NrmlFrs, Srv&CdDn,
// etc
Ovrvw=[ // 'Overview' block, summarizes process data
Prcss=ScrnLd, // *** This is a 'screen load' process. Other possible
values are ScrnSave, ScrnSbmt, ScrnVoid
Scrn=DemographicsScreen, // ***
TrmnType=NrmlFrCnt, // *** Termination type is 'normal frame count'.
See below for explanation and other possible values.
StrtMm=96542720, // Memory allocated at beginning of process - See
explanation for 'Mm' below.
StrtTm=1310664367823, // Epoch start time
PsblDrn=7062, // *** 'Possible duration' - Performance Logging's
estimate of how long it takes new screen to become visible - in ms.
PsblMmUse=15486976, // Performance Logging's best guess at memory
consumed or released - See explanation for 'MmUse' below.
Srv&CdEndMm=98062336, // 'Server & code end memory' - memory
allocated at the end of Server Call phase - See explanation for 'Mm'
below.
Srv&CdEndTm=1310664368026, // Epoch time at end of Server Call phase
Srv&CdDrn=203, // *** Duration of Server Call phase, in ms.
Srv&CdMsUse=1519616, // Memory consumed or released in Server Call
phase - See explanation for 'MmUse' below.
RndrPsblEndMm=112029696, // Memory allocated at Performance Logging's
best-guess Render phase end memory - See explanation for 'Mm' below.
RndrPsblEndTm=1310664374885, // Epoch time at Performance Logging's
best-guess Render
phase end time
RndrPsblDrn=6859, // *** Performance Logging's best guess at how long
it takes to render screen so that it is visible (but not interactive)
```

```

in ms.
RndrPsblMmUse=13967360, // Performance Logging's best guess at memory
consumed or released during Render phase - See explanation for
'MmUse' below.
ComptdMxNrmlFrDrn=1000, // Performance Logging's computed estimate
on how many ms. a 'normal frame' can take - longer is considered
'abnormal'.
NrmlTrmnnNrmlFrCntReq=20 // See explanation below
],
NrmlFrD=[ // 'Normal Frames' block
FrCnt=3, // 'Frame count', for example, 3 normal frames occurred
MinMn=96620544 // 'Minimum Memory' allocated during these frames -
See explanation for 'Mm' below
],
Srv&CdDn=[ // 'Server Phase Done' block
Mm=98062336, // Memory allocated - See explanation for 'Mm' below
Tm=1310664368026 // Epoch time
],
AbnrmlFr=[ // 'Abnormal Frame' block
Drn=5032, // Duration of frame in ms. Note that this is longer than
the 'normal frame' limit of 1000
E2XDrn=0, // Duration from 'enter frame' to 'exit frame' - See
explanation below
Mm=105197568
], NrmlFrS=[
FrCnt=4,
MinMm=106479616
],
UpdtCmpltEvnt=[ // 'Update Complete Event' block
Mm=112029696,
Tm=1310664374885,
Src=...ns.ScreenArea3573.HBox3579.screenArea.DemographicsScreen3563
// Info on what container sent event, for example, DemographicsScreen
],
UpdtCmpltEvnt=[
Mm=112029696,
Tm=1310664374885,
Scr=...w.MemberWorkspaceView2505.summaryArea.screens.ScreenArea3573
FrCnt=33,
MinMm=112250880
Trmn=[ // 'Termination' block Mm=112259072,
Tm=1310664391605
]


```

The following table shows the abbreviations, terms, and definitions for the following file:  
TruCare\_client\_performance\_info.log

**Table 31. Abbreviations, terms, and definitions for TruCare\_client\_performance\_info.log**

Abbreviation	Term	Definition
ComptdMxNrmlFrDrn	Computed Max Normal Frame Duration	<ul style="list-style-type: none"> <li>Computed value for each process that Performance Logging monitors.</li> <li>Used to determine whether frames are normal or abnormal.</li> </ul>

Abbreviation	Term	Definition
		<ul style="list-style-type: none"> <li>Any frame that takes longer than the milliseconds specified by this value is considered abnormal.</li> <li>The minimum possible value is 1000 ms, but it could be greater on a very slow machine.</li> </ul>
E2XDrn	Enter Frame To Exit Frame Duration	<ul style="list-style-type: none"> <li>Period between enter frame and exit frame events for a Flash Player frame, and the data is reported for abnormal frames.</li> <li>This period roughly corresponds to the frame phase where Flash Player executes code.</li> <li>The other frame phase from exit from to enter from is when Flash Player does rendering.</li> <li>Subtract the value from the frame duration you can view how much time Flash Player spent rendering within a given frame.</li> </ul>
Mm	Amount of Memory	<p>Amount of memory in bytes currently allowed to all active Flash Player instances. This value:</p> <ul style="list-style-type: none"> <li>Is determined by <code>System.totalMemory</code> in the <code>ActionScript</code> code.</li> <li>Reflects the total memory allocated to all active Flash Player instances. When gathering data, be sure that no other browser screens are showing Flash content.</li> <li>Does not reflect memory used by the browser that shows TruCare or by Flash Player. It only reflects memory allocated by Flash Player's internal allocator.</li> </ul> <p>The internal allocator allocates memory for the bulk of internal Flash Player constructs, primarily, object instance creation but does not allocate memory for the just in time (JIT) buffer associated with the AS VM, memory associated with platform bitmap data, or memory allocated by operating system calls.</p>

Abbreviation	Term	Definition
		 <b>Note</b> Debug compiled Shock Wave Files (SWFs) consume more memory than standard SWFs, and the debug Flash Player uses more memory than the standard player. Thus, to get a true picture of the amount of memory allocated to TruCare, gather data using standard SWFs in the standard Flash Player.
MmUse	Memory User	<ul style="list-style-type: none"> <li>Value indicating whether allocated memory increased or decreased, and by how much.</li> <li>A positive value indicates that allocated memory increased.</li> <li>A negative value indicates that allocated memory decreased.</li> </ul>
NrmlTrmnNrmlFrCntReq	Normal Termination Normal Frame Count Required	Number of normal frames counted when the Render phase is complete. Currently, this is a hard-coded value.
Srv&Cd	Server Call and Code	Indicates Server Call phase. Should change it to <i>SrvrPhs</i> .
TrmnType	Termination Type	For information about the types of termination, refer to the following table.

**Table 32. Abbreviations, Terms, and Definitions for Termination Types**

Abbreviation	Term	Definition
NoTrmnData	No Termination Data	Indicates that performance logging has no data about why the monitoring process stopped. This indicates a problem.
NrmlFrCnt	Normal Frame Count	Determined by a specific number of normal frames after a significant update complete event when the Render phase is included in logging.
Srv&CdCmplt	Server Phase Complete	Determined when the Render phase is not included in the logging. Performance logging stops monitoring the process when the Server phase ends.
Tmout_Rndr	Timeout, Render	Determined when performance logging does not identify a <i>NrmlFrCnt</i> termination within the allowed Render phase timeout period.
Tmout_Srv&Cd	Timeout, Server Call	Determined when the Server Call phase does not end within the allowed Server Call timeout period.