TruCare Mobile User Guide Windows

Version 25.1

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TruCare Mobile App Introduction

Welcome to the User Guide for TruCare Mobile - a comprehensive mobile application designed to empower care managers to execute various care management tasks efficiently, even on the go. This guide aims to provide you with a detailed understanding of TruCare Mobile, its features, functionalities, and how to utilize them effectively.

TruCare Mobile's key features include

- **Remote Care Management:** Supports remote access and management of patient information in Online and Offline mode.
- **Real-time Collaboration:** Supports users contributing collaboratively and ensures real-time data accuracy for uninterrupted patient care.
- **Offline Capability:** Supports care management in areas with limited or no internet coverage and reduces dependency on continuous connectivity, ensuring uninterrupted functionality.
- **Security:** Supports user-based security and encrypts member data downloaded on the application.
- **Member Summary** page: Supports care managers by allowing them to view clinical data (contacts, referrals, cases, programs, and authorizations) in a streamlined manner.
- *PDF* functionality: You can generate PDFs of the clinical data from any screen within the **Member Summary**.

Product Preview

What is it?

TruCare Mobile embeds some features from our Population Health solutions into a Windows tablet application. TruCare Mobile is a separately licensed companion app to TruCare Population Health that empowers care managers to efficiently work with members off-site and offline as necessary. With secure access to clinical, care management and member information, TruCare Mobile supports remote care management, ensuring comprehensive insights and streamlined patient care for modern healthcare professionals anytime, anywhere.

TruCare Mobile Release Summary

The latest release of TruCare Mobile introduces several key enhancements to improve user experience and functionality, including comprehensive patient information, member clinical summary integration and UX/UI improvements.

Member Summary page includes three new additional tabs and a PDF button

- **Contacts**: View personal, provider, and organizational contact details by tab. Expand each tab to see full contact information.
- **Care Management**: Access member-related referrals, cases, and programs across three tabs.
- **Authorizations**: View Authorization details like providers, dates, and status.
- A PDF button is displayed in the **Member Summary** page to generate and open a PDF.

MCG assessments for Members

Create and manage Milliman Care Guidelines (MCG) assessments for online and offline members. The MCG assessment includes the following functionalities:

- You can add, view, edit, and void MCG assessments for a member in online mode. In offline mode, you can only view, edit, and void a member's MCG assessments.
- In the assessment summary, MCG assessments include the MCG tag for identification. When you select Add Assessment button, you see TruCare OOB and MCG assessments listed alphabetically, with MCG in brackets along with the MCG version number for MCG assessments.
- Icons for Quality Measures (QM) and Annotations, Footnotes, and References appear next to questions based on MCG configuration. Click this icon to view more information on the quality measure, annotation, footnote, or reference.

The login screen displays configuration and environment setup

The **Sign in** screen of the mobile application now displays **Configuration** and **Environment setup** details at the bottom. The top left shows the environment and release version, while tapping the i icon in the top right reveals additional application information.

Getting started

This chapter provides essential instructions on installation and setup, ensuring that users can seamlessly integrate TruCare Mobile into their care management workflow and enhance their efficiency in managing patient care.

Installation and Setup

Follow the instructions in the TruCare Mobile Installation and Configuration Guide to install and set up TruCare Mobile application. The guide provides information regarding:

- Downloading and installing the TruCare Mobile application.
- Information on the system prerequisites to run the application.
- Configure the mobile application to connect to the appropriate environment.

Logging in and out of the TruCare Mobile application

TruCare Mobile login modes:

1. **Directly login to the Online or the Offline Mode**:

   You can now select between the Online and the Offline modes directly from the login screen. The login screen will default to the Online mode. However, you can opt for the Offline mode by selecting it from the dropdown on the login screen.

   Upon successful login, users in Online mode will have access to the **Online Managed List**; while users opting for Offline mode will seamlessly transition to the **Offline Managed List**.

   > **Note**
   >
   > New User Login: For first-time logins, the Offline mode option is disabled. You must initially log in Online, enabling Offline mode access for subsequent logins.

2. **Pop-up confirmation on log-out**:

   Both in the Online and the Offline mode, upon clicking on the power button to log out, you'd see a popup notification asking you to confirm your action with the note 'Are you sure you want to log out? Any unsaved changes will be discarded.'
3. Refer to the section Configuring your environment to switch between different environments within your ecosystem.

Logging in

To log in to the mobile application:

1. Double-click on the app icon to launch the application.

   The splash screen appears with the TruCare logo, followed by the login screen.
2. Enter your login credentials, which are the same as your TruCare web application.

   Username and Password both are case-sensitive.
3. Click **Sign in**.

   > **Note**
   >
   > - The Sign in button remains disabled until you have entered your username and password.
   > - When you launch the mobile application, the Sign In screen shows the *Configuration* and *Environment* setup details at the bottom.

When your credentials are authenticated, you should see the Managed Member's List screen for your account.

If you've entered invalid or unmatched login credentials, the system will show an error message as 'Invalid Username and Password!' and the fields with the incorrect text will be highlighted in red.

Note

The top left displays the environment details with the release version. In the top right, tap the 'i' icon to view the application information.

Logging out

To log out:

- From the upper right corner of the screen, click on the power button to log out of the application.

On the pop-up window that appears:

- Click **Sign Out**, to log out of the application and any unsaved changes will be discarded.
- Click the **X** icon to close the pop-up and return to the previous screen.

Using TruCare mobile

You can use TruCare Mobile to improve your care management workflow.

Member Management

Retrieve patient information efficiently.

- View the **Managed Members List** in a table as well as grid mode.
- Search for members, add and remove members to your Managed Members List.
- Add General notes to a member's profile

Managed Members List

The Managed Members List screen is the first screen that appears when you've logged in to the mobile application. Upon successful login, users in Online mode will have access to the **Online Managed List**; while users opting for Offline mode will seamlessly transition to the **Offline Managed List**.

You can view all members, access the Member Summary Page [10], search, and add or remove members. You can also download specific member's data to take to the Offline mode.

By default, all members will be shown on the Managed Members List. However, you can filter out Online and Offline members from the list by selecting those options in the top left corner of the screen.

> **Note**
>
> For users logging into the mobile app for the first time, the Managed List would appear empty as there would be no members added to it by default. Refer to Add Member [8] to add members to the Managed List.

Member Cards

The Member Cards show an overview of all members in the Managed Members List. These visually appealing cards display essential information like the members' Name, Date of Birth (DOB), and Member ID.

Each card is divided into two distinct sections: the upper Gray section and the lower White section.

- In the upper *Gray* section, you'll find a convenient checkbox to select members for specific actions such as **Move Offline** or **Remove**.
- The lower *White* section is interactive; clicking on it grants access to the **Member Dashboard [9]**

Add Member

To add a member to your Managed List:

1. Click on the Search icon on the upper right side of the screen.

   This opens the Member's Search page
2. Fill in the search criteria.

   > **Note**
   >
   > You can fill in any of the following mandatory fields to perform a member search: First Name, Last Name, Member ID, and DOB.

3. Click **Submit**
4. When the search results load, select the member by clicking on the member's name.
   - You can select one or multiple members at this stage.
   - A green check mark indicates that the member has been selected
   - The option to Add the member appears below Submit.
5. Click **Add**

   A confirmation pop-up appears with the question 'You have chosen to add this member. Do you want to continue?' Click **Yes** to add the member to the list and **No** to return to the member search screen.

   The members get added to the list in alphabetical order.

Remove Member

To remove a member from your Managed List:

1. Click to select the member
   - You can select one or multiple members at this stage.
   - A green check mark indicates that the member has been selected
   - The option to Remove the member appears on the top right.
2. Click **Remove**

   A confirmation pop-up appears with the question 'Are you sure you want to remove the selected member(s) from the Managed List'. Click **Yes** to remove the member from the list and **No** to return to the Managed List screen.

   A pop-up note in green highlight at the bottom of the screen confirms the removal of a member with the text 'Member removed successfully'

   Should you not need to remove the member(s) after they've been selected, click on **Cancel** to go back to the Managed List screen.

Member Dashboard

On the Member Dashboard page, you will find detailed information about each member's profile which includes Member ID, Age, Date of Birth (DOB), Gender, Eligibility, Allergies, Blood Pressure (BHP), Marital Status, and Employer. Additionally, the dashboard cards summarize key aspects such as:

- **Member Summary [10]**: Access vital member details, including contact information, PCP details, and preferred contact times.
- **Allergies [11]**: View and manage member allergies
- **Diagnosis [11]**: View the member's diagnosis information.
- **Medications [12]**: View the Member Medications page from the Member Profile.
- **Notes [17]**: Add general notes to a member directly from the Member Profile.
- **Assessments [12]**: Create and manage assessments for members.
- **Care Plans [14]**: TruCare includes a library of care plans that you can use and a library of problems, objectives, and actions. You can create your own care plan, building it from a combination of existing and custom components.

> **Note**
>
> The Care Plans added in TruCare web and TruMobile supports view careplan only.

To launch the Member Dashboard, click the member's name on the Managed Members List

Manage Offline Members

To help you manage member information in unstable or no-network areas, TruCare offers the offline member feature. This feature allows you to move a member offline and continue working on their profile.

While the member is offline, you can modify their profile and information in your local system. Once the network stabilizes, the updated information syncs to the online account, and you can move the member's profile back to online status.

> **Warning**
>
> You must ensure that you synchronize the updated information within the time limit set by the administrator. Any information not synchronized within this time will be discarded.

Viewing offline Members in online mode

A lock icon is displayed next to the member’s name if you download or view an offline member's profile.

While the member is offline, a tooltip is displayed near the disabled features.

Also, you can see a countdown timer that tracks the time remaining to sync data, updating hourly and showing minutes and seconds when under two hours. Pop-up alerts appear with 24 hours remaining or for unsaved changes, helping prevent data loss by keeping you aware of sync deadlines. Timer settings can be adjusted in the admin console but only affect future offline instances.

Member clinical information

Access vital member details both in the online as well as the offline mode, such as:

Member Summary

In the **Member Dashboard [9]**, TruCare Mobile comprises of the following sections in the **Member Summary** page: Further details are outlined in the following points:

- **General Information**: This is the default page that opens when you click on Member Summary. It shows member information across the fields of **Member Details**, **Demographics**, and **Languages**
- **PCP Summary**: This shows a list of both the active and the inactive providers assigned to the member in a table or a card layout. You can also view the provider’s details in a table format by selecting the toggle button at the top right, which lets you switch between card and table views Click on the provider's card to view additional details. The information about the provider is available across two tabs:
  - **Provider**: This tab shows Details, ID numbers, Demographics, Specialties, and Credentials of the providers.
  - **Location**: Different locations of the providers are available on a dropdown menu. When you select any, the page shows additional information across the fields of Details, Phone/Fax Numbers, Addresses, Email Addresses, Network Affiliations, and Services Offered.

> **Note**
>
> For all providers, an indicator on the right side of the page shows **active** or **inactive** depending on their status.

- **Member Contact**: This page shows the contact information of the member under the different tabs such as Phone Numbers, Email addresses, Addresses, and Preferred Contact Times
- **Benefits Summary**: This page shows a comprehensive benefits summary for the member across two different tabs, namely Client Coverage (including coverage rank, product details, policy numbers, group numbers, etc.) and Other Coverage (carrier information, status, start and termination dates, policy holder details, and group names, etc.)
- **Contacts**: This page shows the member's contact details across three different tabs, namely **Personal** (Relationship, Type, Start Date, and End Date), **Provider** (Specialty, Start Date, and End Date), and **Organizational** (Organization, Start Date, and End Date). Furthermore, clicking the caret in each tab reveals the corresponding contact information.
- **Care Management**: This page shows care management-related information associated with this member. You see the information across three different tabs, namely **Referrals** (Source, Request Date, and Decision), **Cases** (Case name, Type, Acuity, Score, Start date, Status, and Primary case owner), and **Programs** (Service level, Engagement level, Start and End dates, Status, Source, Case number, and Case name.)
- **Authorizations**: This page shows the **Authorization** details. It includes Facility, Requesting Provider, Servicing/Rx Provider, Admit Diagnosis, Admit Date, Discharge Date, End Date, and Status.

  If the authorization is open, the **Status** is displayed in the color blue. For other states, the **Status** is displayed in the color grey.

> **Note**
>
> You can view this information both online and offline.

The Create PDF button is located in the top right corner of any **Member Summary** page to generate a PDF. The PDF can be generated while in offline mode.

Allergies

You can access the Member Allergies page from the Member Profile. This section displays all allergies with their active/inactive status.

To open the **Allergies** page

- Click Member Profile → Allergies to access

  You will see a list of all allergies with their **active/inactive** status.
- Click on the chevron **>** to expand any allergy.

  The expanded section shows further details such as Allergy name, Reaction, Severity, Active/ Inactive status, Source, Date Identified, and Allergy Details.

Diagnosis

You can now access the **Diagnosis** page from the Member Dashboard. This section presents a list of all diagnoses with their status (open/closed).

- To access click Member Profile → Diagnosis

  You will see a list of all diagnoses with the status: **open/closed**
- Click on the chevron **>** to expand any diagnosis.

  The expanded section shows further details such as Diagnosis name, Primary diagnosis (yes/ no), Diagnosis Code, Code set, Reported date, Reported by, Status, Closed by and Closed date.

Medications

You can access the **Member Medications** page from the Member Profile. Here, you will find a search box to search for medication names and a **Status** drop-down menu with options: All, Open, Completed, and Discontinued (default is 'Open').

- To access click Member Profile → Medication
  1. Use the search box to find a specific medication by name.
  2. Select a status from the **Status** drop-down menu (**All/Open/Completed/Discontinued**)
  3. Click **Search** to update the results.
  4. Two additional checkboxes, **Supplements** or **Void** allow you to include those medications into your list.

  By default, the medication list shows **Open** status, but you can change this using the dropdown.

  On the medication page, you can view medication details like status, last reviewed date, and more next to each medication name.

> **Note**
> TruCare Mobile does not currently support MTM (Medication Therapy Management).

Assessments

Create and manage assessments for members.

- Add, view, edit, and void assessments for a member.
- View the progress bar indicating the number of mandatory questions answered while the user is adding or editing an assessment.

Add an Assessment

To add an assessment:

1. Click the **Add Assessment** button on the top right of the screen
2. From the Select item dropdown menu, select the name of the assessment.
3. The **Add Assessment** screen appears, displaying the assessment group questions. Select answers for each question in the group. To include notes, click the **Notes** button and add your assessment and questions group notes."
4. Click **Save**

> **Note**
> TruCare Mobile displays Program Enrollment question group elements on the Add Assessment page. For more details, refer to the topic. Enroll a member in a program based on Program Enrollment responses

Edit an Assessment

To edit an assessment:

1. Click to select **In Progress** assessment from the assessments list.
2. Click **Edit**

The progress bar at the top of the page shows the number of Required Assessment Questions completed against the total Required Assessment Questions in the entire assessment.

Note

- Only the assessments that are in the **In Progress** status can be edited. Assessments that are either **Completed** or **Void**, cannot be edited.
- Only the assessment that is assigned to a particular user can be edited by them and not by anyone else

Submit an Assessment

After you have answered all the required mandatory questions within an assessment, you will have the following options:

- **Submit without signature** to submit the assessment.
- **Cancel** to cancel the changes that you've made.
- **Save** to save the changes that you've made.
- **Submit** to capture the member's signature on the assessment.

After you submit the assessment, its status will change to **Complete** and you will no longer be able to make any changes to it thereafter.

Note

When an assessment is submitted in Offline mode (with or without a signature), its status will be shown as **Complete(Offline)**. You can save an assessment in offline mode while it's in progress. The assessment displays as 'In Progress (Offline). This will move to **Complete** only when the data is synced back.

Void an Assessment

To void an assessment:

1. Click the ellipsis in the **Action** column and select a void reason from the dropdown menu.
2. Click **Void**

Note

- In the **Assessments Summary**, the **Void** option will not be selected by default under the **Include** filter. As a result, the voided assessments will not appear. You must select the **Void** filter to view the voided assessments.
- You can void any assessment from the **Assessment Summary** screen while offline. After voiding, the status changes to **Void (Offline)**.

Create a PDF of an Assessment

To create a PDF of an assessment:

1. Click to select an assessment from the assessments list.
2. Click **Create PDF**

   PDF will open in the default browser set for the device.

   The PDF will also show the member's signature captured on the assessment.

Note

Users can create a PDF of an assessment while offline. Changes made to the assessment does not appear in the PDF until the data is synced online.

MCG assessments for Members

Create and manage Milliman Care Guidelines (MCG) assessments for online and offline members. The MCG assessment includes the following functionalities:

- You can add, view, edit, and void MCG assessments for a member in online mode. In offline mode, you can only view, edit, and void a member's MSG assessments.
- In the assessment summary, MCG assessments include the *MCG* tag for identification. When you select Add Assessment, you see TruCare OOB and MCG assessments listed alphabetically, with *MCG* in brackets along with the MCG version number for MCG assessments.
- Icons for **Quality Measures** (**QM**) and **Annotations**, **Footnotes**, and **References** appear next to questions based on MCG configuration. Click this icon to view more information on the quality measure, annotation, footnote, or reference.

Care Plans

Care Plans provide care managers with a complete and efficient tool for managing patient care. This feature allows care managers to view all Care Plans in a structured table format, expand each plan for detailed insights, and easily add notes to any Care Plan within TruCare.

Accessing Care Plans

To access Care Plans, perform the following:

1. Tap a member from the Online Members list.
2. Tap the Care Plan module.

Viewing Care Plans

By default, the Care Plans screen displays only open Care Plans, with the following details visible:

- Care Plan name
- Status
- Owner
- Start date

To view all Care Plans, including closed ones, simply check the box in the top right corner of the page. To interact with a Care Plan, tap on it to display its associated Problems, Goals, and Interventions. You can see a list of Care Plan elements displayed.

To navigate within a Care Plan, tap the Care Plan navigation link to return to the main screen.

Exploring Problems

You can see the Problems section is displayed with a list of problems for that member. Additional details available for each Problem include:

- Problem description
- Priority icon
- Last updated date
- Status of the problem
- Start date
- Information icon: Tapping the Problem info icon brings out its details. This includes the Description and Comments sections. Tapping the arrow next to the Description displays more information. Similarly for the Comments section.
- Priorities are indicated using color-coded levels and icons:
  - **Low** - Blue

  - **Medium** - Orange
  - **High or Critical** - Red

  If you opt not to use out-of-the-box priorities, and use custom priorities or numbers for priority, the priorities will appear in black text without any icon.

Exploring Goals

Tap the Problem panel, to view the Goals for the problem. The Goals section provides detailed information such as:

- Goals description
- Priority icon
- Last updated date
- Start date
- Target date
- Progress bar (indicating completion percentage)
- Information icon: Tapping the Goal info icon brings out its details. This includes the Description, Comments and Outcome details sections. Tapping the arrow next to the corresponding titles displays more information.
- Priorities are indicated using color-coded levels and icons:
  - **Low** - Blue
  - **Medium** - Orange
  - **High or Critical** - Red

  If you opt not to use out-of-the-box priorities, and use custom priorities or numbers for priority, the priorities will appear in black text without any icon.

Exploring Interventions

To view and Intervention:

1. Navigate to **Members Dashboard** > **Care Plans** > **Problem** > **Goals** > **Interventions**.

- **Interventions** description
- Priority icon
- Updated status
- **Low** - Blue
- **Medium** - Orange
- **High or Critical** - Red
- Info icon: Tapping the **Interventions** info icon brings out its details. This includes the **Description**, **Comments** and **Related Task** sections. Tapping the arrow next to the corresponding titles displays more information.
- Tap the panel in the list to access the **Goals** section. Select a goal to view its associated interventions, and switch between **Problems** or **Goals** to explore related interventions. To go back, tap on the section titles, such as Interventions, to return to the previous section.

Managing independent Goals, Interventions, and other elements

When you open the **Care Plan** page, you first see a list of **Problems**. You can click into each problem to view its related **Goals** and **Interventions**. However, sometimes goals may not be mapped to a problem, and interventions may not be mapped to a goal. In those cases, these elements still appear on the **Care Plan** page. Goals that are not linked to any problem are shown below the list of **Problems**. Similarly, interventions not linked to a goal will still be displayed, ensuring no care element is missed. You can click on a problem or goal to explore its associated elements. Even if a goal is not linked to a problem but has interventions, those interventions will be shown under that goal for easy access.

Care Plan Notes

Adding a new Care Plan note

To add a Care Plan note, perform the following steps:

1. Navigate to the **Care plan** and select an open care plan.
2. Click the Notes button
3. Input the required note details in the **Add Note** screen.
4. Choose an artifact type:
   - Care Plan note: If you select `Care Plan`, the **Note Type** field is automatically set to **Generic Care Plan Note**.
   - Problem note: If you select `Problem`, choose a problem from the drop-down list of problems associated with this care plan. The **Note Type** field is locked to `Generic Problem Note`.
5. Type your note details in the **Note Text** section.

   If you click Cancel while adding a note, a confirmation pop-up appears. Click Yes to discard your changes, or No to continue editing.
6. Ensure all required fields are filled out, then click Submit to add the note to the care plan notes section. If any required details are missing, an error message appears indicating which fields need completion.

Note

- A user cannot add **Notes** to a closed Care Plan.
- The number displayed in the Notes button indicates the number of notes successfully submitted in the care plan. You can access the care plan's Notes button on all pages related to that plan, including problems, goals, and interventions. Clicking this button lets you view or add notes, displaying details like **note type**, **name, status**, **creator**, and **creation date**. Expand notes using the caret icon.
- Clicking the Notes button displays a list of notes related to the care plan, and you can add new notes from this page.
- Online mode
  - Provide a reason and confirm the action to void a note. The system displays void information alongside the original note details.
  - Choose either a **Care plan** or a **Problem note** to add a note. Some fields are pre-populated.
- Offline mode: Offline mode disables the Add Note and Void Note buttons, as these functions are not available.

Note

When the member is moved offline, all the information related to that member is visible in offline mode in the TruCare mobile application.

Notes

You can add and view General Notes.

Add General Note

You can add general notes to a member directly from the member profile.

- Click the Member Profile → Notes → Add Note.
- Enter your notes in the **Notes Description** box.
- Click the **Save** button.

A notification at the bottom of the screen confirms that the note has been successfully saved and shows the text Note has been saved successfully

If on the **Add Note** page, while editing a note, you click **Cancel**, a pop-up appears that requires you to confirm if you would like to discard the changes and leave the page.

- Click Yes, to go back to the **Notes Summary** page.
- Click No, to close the pop-up and stay on the same page with the changes retained.

Note

- The **Note Type** dropdown will be locked to **General Note** and this cannot be changed.
- The **Category** dropdown will be locked to **Admin Note** and this cannot be changed
- In offline mode, the system disables the Add Note and Void Note buttons, as this function can only be completed in online mode.

Generate PDF Notes

To generate a PDF Note (**Online Mode**):

1. Navigate to **Member's Profile** > **Notes**.
2. The Notes page is displayed with the **Note Type**, **Note Text**, **Created By**, **Created Date**, and **Status Information**.
3. To print a specific note,
   a. Click the **Ellipsis** on the appropriate **Note**.
   b. Click **Create PDF** from the available list.
4. To print multiple notes,
   a. Select the appropriate **Notes** checkbox.
   b. Click **Create PDF**.
5. A PDF is generated with all the selected notes.

Note

The PDF layout is the same for both the web and mobile view.

Working in Offline mode

Learn how to operate TruCare Mobile in offline mode. Securely download member data so the user can add, view, edit, and void assessments, as well as add notes in areas with limited or no network connectivity.

- **General Notes**: Add, Void
- **Assessment Notes**: Add, Void
- **Care Plan Notes**: Add, Void
- **Assessments**: Add, Edit, Void

Disabled features in offline mode

When a member is moved offline, the user who took the member offline can make changes to the member's profile in offline mode. However, neither this user nor anyone else can make changes in online mode, as these features are disabled.

If the user tries to Add, Edit, Void features listed below, they will see an error message The member is currently Offline.

The features disabled for offline mode members are as mentioned below:

- **Care Plan Notes**: Add, Edit, Void
- **Assessments**: Add, Edit, Void
- **Assessment Notes**: Add, Edit, Void

Once the user is moved online the buttons will be enabled and the user should be able to continue with actions as usual.

> **Note**
> When a user is in moved to online mode, they will be able to use these features immediately.

Download member data and take Offline

To download member's data to take offline:

1. Click on the checkbox of the Member card to select the member
   - You can select one or multiple members at this stage.
   - The upper, gray section of the card gets highlighted indicating member selection.
   - The option to **Move Offline** appears on the bottom right of the screen.
2. Click **Move Offline**

   A confirmation pop-up appears with the notice `Move selected members offline` with the name(s) of the member(s) that you've selected.
3. Click **Start**

   A **Completed** checkmark indicates that the download has been completed successfully.

   > **Note**
   > This may take a few minutes depending on the number of members selected and the corresponding data available for that member.
4. Click **Ok**

   To go into the offline mode, click on the **Offline** button on the top middle section of the screen

   A confirmation pop-up appears with the question 'Are you sure you want to go offline'. Click **Yes** to go offline and No to return to the member search screen.

   Upon clicking **Yes**, The downloaded member(s) appear under the Managed List - Offline

Setting the Member Offline Lock Timer

As an administrator, you can use the member offline lock timer to lock a user’s activity for a specified period.

You can set the lock timer for a minimum of 36 hours and a maximum of 168 hours (1 week). Any changes you make to the member offline lock timer will apply only to users added after the updates.

> **Note**
>
> The default member offline lock timer is 48 hours.

As a TruCare Mobile user, you will receive notifications before your account reactivates:

- **Before 24 hours**: You will receive a push notification message.
- **Before 2 hours**: You will see a countdown timer in HH:MM:SS format.

Refer to the TruCare Mobile Installation and Configuration Guide , section Managing offline access for Mobile users for more information.

Capture a Signature

TruCare Mobile allows users to store their signature. When an assessment is submitted, the application enables the user to capture the signature provided in the assessment page.

The signature may be stored in any of the following file format or extensions mentioned below:

- **.bmp**
- **.gif**
- **.jpeg**
- **.jpg**
- **.png**
- **.tif**
- **.tiff**

To capture a signature:

1. On the **Member Dashboard** page, navigate to the **Assessments** page.
2. From the list of assessments, click **Add** or **Edit** an in progress assessment.
3. Answer all the required questions within an assessment.
4. Click **Submit** to capture the member's signature on the assessment.

Points to consider:

Notifications and Alerts

- You see a snackbar message notifying you that the member you are trying to download has been taken offline by another user. A snackbar message provides details if multiple members are offline.
- A message alerts you when you have 24 hours left to sync changes to avoid losing member data updated offline. This notification only appears if you are active on the application at the 24-hour mark. If you are inactive, you do not receive this alert.
- Upon logging in, you get a notification if any members were moved back online because they were not synced within the admin-configured timeframe after being taken offline.
- You see a success snackbar message when a member is successfully moved back online.

Timers and Icons

- Hovering over the lock icon next to offline member shows the offline status. You can bring members back online within the admin-configured period, but any unsaved changes will be lost afterward.
- You see a lock icon when another user takes the member offline. Hovering over the lock icon displays a tooltip showing the username of the person who took the member offline.

- Only the user who took the member offline can bring them back online. Additionally, locked members cannot be downloaded to other users' local devices.

Create Assessments in Offline mode

You can view, add, and edit assessments to a member that has been downloaded to the offline mode, in the same manner as in the online mode.

To add an assessment refer to Create Assessments for members [12]

Add General Note

You can add notes to the member's profile even in the Offline mode.

To add a note to the member's profile refer to Add General Note [17]

Web updates for Assessments, Notes and Care plans

Note

When accessing a member's profile in TruCare client, certain functionalities are restricted if the member has been taken offline. Specifically, the options to Add, Edit, or Void Care Plan Notes are disabled, with the buttons grayed out. You can add general notes but cannot edit or void the general notes for members taken offline. These restrictions remain until the member is brought back online, manually or automatically. A lock icon and tooltips in English and Spanish explain the limits. Once the member is online again, all actions are re-enabled.

These actions; Add, Edit, and Void are disabled for **Assessment** notes. Similarly, you cannot add, edit, or void **Assessments** for members who are taken offline.

This applies to **Assessments**, **Notes**, and **Care plans**.

Sync data

Sync data between online and offline modes.

- Seamlessly synchronize this data back to 'Online' when users are connected to the internet.

Sync data back online once connected to the internet

Any assessments that were newly added, edited, or closed in the Offline mode as well as any General Notes added in Offline mode will be synced to the member's account automatically when the member is moved back to Online mode.

On the Managed List screen, a notification dot with a numerical value corresponding to the number of changes made while offline will show on the member's name.

- Select the member(s) with the notification(s) against their name(s)
  - You can select one or multiple members at this stage.
  - A green check mark indicates that the member has been selected
- Click **Go Online with Member**

The Managed List screen appears with a green checkmark on the member's name indicating that the member has moved back online.

Frequently Asked Questions (FAQs)

Get answers to frequently asked questions about the TruClient Mobile application.

How to Transition from Online to Offline Mode

1. **Direct Login to Offline Mode**:

   If you've directly logged into Offline mode and updated member data, follow these steps:

   - Select the member(s) to sync data for.
   - Click on '**Go Online with member(s)**'.
   - Enter your login credentials in the popup notification that appears.
   - Your username will already be pre-filled.

2. **Switch from Online to Offline Mode**:

   If you've switched from Online to Offline mode and updated member data, follow these steps:

   a) If your login session has expired (not logged in to Online mode for more than 30 mins):

   - Select the member(s) to sync data for.
   - Click on **'Go Online with member(s)'**.
   - Enter your login credentials in the popup notification that appears.
     Your username will already be pre-filled.

   b) If your login session is active (logged in to Online mode within the past 30 mins):

   - Simply confirm the members you're taking Online in the popup.