



# Care Management System

Guiding Care – Population Health

---

**Quick Start Guide**

© 2019. Altruista Health®

Altruista Health®  
11800 Sunrise Valley Drive,  
Suite 1100  
Reston, VA 20191  
Phone: 703-707-8890  
Email: [priority-support@altruistahealth.com](mailto:priority-support@altruistahealth.com)

This manual is the proprietary and confidential property of Altruista Health®. All resulting rights, in particular the rights of translation and duplication, are reserved and shall be subjected to a separate agreement. Do not share without prior approval.

Altruista Health reserves the right to modify the described product in compliance with technical progress at any time and without prior notice unless otherwise provided in the agreement. Product in compliance with technical progress at any time and without prior notice unless otherwise provided in the agreement.

# Introduction

**Population Health Management (PH)** is a proactive, patient-centric approach to health care that engages physicians in prevention and wellness of patients with the goal of improving clinical outcomes while reducing costs. To enable successful population health management, it is crucial to involve a physician in a patient's care, while also offering the ability to track the clinical measures for patient's health improvement through care management.

**GuidingCare®** is a web-based healthcare management system designed to help health plans improve health outcomes and reduce avoidable costs for at-risk populations. The Population Health module helps physicians in monitoring the quality measures that are identified and executed for their patients.

## Current state on the Provider Portal

Search for a Member > Member Info Panel and other accordions display:

Member Eligibility

CareSource Id

Medicaid Id

Member Info

Case Number

Multiple CareSource Ids

Multiple Medicaid Ids

Medicaid Id: 10

Member is eligible for service on the specified date

Date of Service 1/3/2020

Search

Member Information

Member Name: Michelle

Address:

CareSource Id: 10

City, State, Zip: Parma, OH, 44129

Medicaid Id: 10

County: Cuyahoga

Medicare Id: 2

Phone: (216)

Case Number:

Date of Birth:

Gender: Female

Relationship to Subscriber: Subscriber/Insured

Member Profile: Not Available for this Member  
[Member Profile Report Definitions](#)

Program Details: If Member is <18 years of age - SSI. If the Member is 18 years of age and older - SSDI.

Program: Ohio -


**Scroll down to see that Assessments Taken and Care Treatment Plan accordion panels for the member are flashing purple to notify the Provider that there is new information to address:**

Subscriber Information	+
Member Covered Benefits Summary	+
Member Dental & Vision Services History	+
EPSDT Alerts	+
Upload Consent Form	+
Clinical Alerts	+
Assessments Taken	+
Care Treatment Plan	+
Triage Summaries	+
Admissions & Discharges	+
COB Information	+
Eligibility Spans	+

**Open the Assessments Taken accordion to see the assessment details for this member and have the ability add comments and acknowledge:**



Assessments Taken

Status Legend

 New Assessment

Page(s): 1

Record(s):2

Status	Details	Assessment	Interviewer	Date Taken	Score	Comments	Acknowledge
	<a href="#">View Details</a>	Monitoring Assessment	RN Jocelyn Brown	1/13/2019		<a href="#">Comments</a>	<a href="#">Acknowledge</a>
	<a href="#">View Details</a>	Monitoring Assessment	Courtney Dyer	7/24/2019		<a href="#">Comments</a>	<a href="#">Acknowledge</a>

Page(s): 1

Record(s):2



Open the Care Treatment Plans accordion for this member to view the Care Treatment Plan and Acknowledge or View and Submit Comments:

## Care Treatment Plan

Last Updated: 06/26/19 at 10:18:28

Last Acknowledged: N/A

### Status Legend

-  New Care Treatment Plan
-  Updated Care Treatment Plan

Export Care Treatment Plan: [PDF](#)

### 2018/10/11 - Monitoring

Goal	Interventions	Outcomes
The member will maintain current health status and will follow up with PCP and specialists.	<ul style="list-style-type: none"><li>The CM will review and analyze claims quarterly for PCP, specialist, ER, hospital, DME, outpatient, and other provider claims. - Late</li><li>The CM will review the medications the member is prescribed. - Late</li><li>The CM will contact the member's appropriate provider(s) to exchange information related to the member's health in order to coordinate care. - Late</li><li>The CM will attempt to contact the member, explain case management, and engage in case management. - Late</li></ul>	<ul style="list-style-type: none"><li>CM has analyzed the member's utilization and documented the findings in the appropriate area(s) of the Monitoring Assessment. - Late</li><li>CM has reviewed the members prescribed medications from available data, such as Pharmacy Benefits Manager, and then documented the findings in the member's Medications List or Medication Review Form of Clinical Care Advance. - Late</li><li>CM has collaborated with the member's appropriate provider(s), and documented the collaboration efforts in the appropriate area(s) of the Monitoring Assessment. - Late</li><li>CM has attempted contact with the member and has documented the efforts to contact the member in the appropriate area(s) of the Monitoring Assessment. - Late</li></ul>

Acknowledge Plan Updates

View and Submit Comments

## Future State for Guiding Care on the Provider Portal

Search for a Member > Member Info Panel and other accordions display:

Member Eligibility

CareSource Id

**Medicaid Id**

Member Info

Case Number

Multiple CareSource Ids

Multiple Medicaid Ids

Medicaid Id: 10

Member is eligible for service on the specified date

Date of Service: 1/3/2020

Search

Member Information

Member Name:

Michelle

Address:

CareSource Id:

10

City, State, Zip:

Parma, OH, 44129

Medicaid Id:

10

County:

Cuyahoga

Medicare Id:

2

Phone:

(216)

Case Number:

Date of Birth:

1/1/1978

Gender:

Female

Relationship to Subscriber:

Subscriber/Insured

Member Profile:

Not Available for this Member  
[Member Profile Report Definitions](#)



Program Details:

If Member is <18 years of age - SSI. If the Member is 18 years of age and older - SSDI.


Program:

Ohio - Medicaid


Scroll down to see that Assessments Taken and Care Treatment Plan accordion panels for the member have a new icon to indicate the functionality is now available in Guiding Care:

Subscriber Information	+
Member Covered Benefits Summary	+
Member Dental & Vision Services History	+
EPSDT Alerts	+
Upload Consent Form	+
Clinical Alerts	+
Assessments Taken 	+
Care Treatment Plan 	+
Triage Summaries	+
Admissions & Discharges	+
COB Information	+
Eligibility Spans	+

**Open the Assessments Taken accordion and see the instructions for how to locate the member and the assessment on the Care Management Tool:**


Assessments Taken 

VIEW ASSESSMENTS WITH OUR NEW CARE MANAGEMENT TOOL




STEP 1

From the **Care Management Dashboard**, select a member using the left-hand **My Members** link or by searching for a member at the top of the screen.




STEP 2

Once your member is selected you will be taken to the **Member Info** panel on the **Member Summary** page.



STEP 3

Select **Activity Record** on the left-hand side of the Member Summary page and proceed to the **Activity Summary** tab. The member assessments are found under **Script Activity**.


Visit the Care Management dashboard 



Open the Care Treatment Plans accordion for this member and see the instructions for how to locate the member and the care treatment plan on the Care Management Tool:


Care Treatment Plan

VIEW CARE PLANS WITH OUR NEW CARE MANAGEMENT TOOL




STEP 1

From the **Care Management Dashboard**, select a member using the left-hand **My Members** link or by searching for a member at the top of the screen.



STEP 2

Once your member is selected you will be taken to the **Member Info** panel on the **Member Summary** page.



STEP 3

Select **Care Plan** on the left-hand side of the Member Summary page to review care plans for the selected member.

Visit the Care Management dashboard

# Global Search

Users can perform a Global Search using different search criteria from any page of the application except from the Population tab on the Dashboard.

## Membership Navigation

The Configurable Benefit Hierarchy (CBH) feature allows Health Plans to configure the application at various eligibility levels and level values. With CBH, Clients can match eligibility to the claims system and support configurations at any level of the eligibility hierarchy.

For Users who are logged in as Providers, the Global Search option is displayed as pictured in the image below.

The screenshot shows the Global Search interface. On the left, there is a sidebar with 'Dashboard' and 'My Members' options. The main search area includes a 'Care organization:' dropdown menu, a 'Search By:' dropdown menu, and a text input field for 'Enter search name'. Below the text input are buttons for 'Save Search', 'Save & Set As Default', and 'Clear'. To the right of the 'Search By:' dropdown is a text input field. Further right are 'NPI:' and 'Client:' dropdown menus, and an 'Additional Search Parameters:' dropdown menu. At the bottom right are 'Search' and 'Reset' buttons. A 'Saved Search:' dropdown menu is also present, with a 'Set as Default' button next to it. Red circles highlight the 'Search By:', 'NPI:', and 'Set as Default' elements.

**Care Organization:** Displays all the active Care Organizations (along with profile types) associated with the logged-in User's current profile.

**NPI:** Displays a list of Provider names associated with the NPI. If multiple Providers are associated with an NPI, the label Multiple Providers is displayed instead of Provider names.

The screenshot shows the Global Search interface with search results for the 'NPI:' dropdown menu. The 'Care organization:' dropdown menu now shows '15 items Checked'. The 'Search By:' dropdown menu is still 'Select'. The 'NPI:' dropdown menu is open, showing a list of providers: '35353 - Multiple Providers' and '36363 - LN'. The 'Client:' dropdown menu is still 'Select'. The 'Additional Search Parameters:' dropdown menu is still 'Select'. The 'Search' and 'Reset' buttons are still present. The 'Saved Search:' dropdown menu is still 'Select', and the 'Set as Default' button is still present. Red circles highlight the 'NPI:' dropdown menu and the 'Set as Default' button.

**Search By:** Displays Member Name, Altruista ID and TIN options in the drop-down. You can select any one option from the list and enter the relevant search text in textbox to filter.

The screenshot displays the Altruista Health Population Health interface. The top navigation bar includes 'Care Coordination' and 'Population Health' tabs. A search bar at the top right shows 'MEMBER NAME' and 'Enter Text'. The left sidebar contains various icons for navigation, including 'My Members', 'Quality Measures', 'Admission/Discharges', 'My Calendar', 'Knowledge Library', 'Requests', and 'Authorizations'.

The main content area features a search panel with the following fields:

- Care organization: Select
- Search By: Select (dropdown menu is open showing options: Select, ALTRUISTA ID, MEMBER NAME, TIN)
- NPI: Select
- Client: Select
- Additional Search Parameters: Select
- Buttons: Search, Reset
- Saved Search: Select
- Buttons: Set as Default, Clear

Below the search panel, there are tabs for 'My Members' with sub-tabs 'Active/Enrolled' and 'Assigned Risk'. A filter section shows 'Filter: Select' and 'Show' and 'Save' buttons. The main table displays member information:

	Last Name ▲	First Name	Altruista ID	DOB	Risk	Risk Score	Client Name	Next Contact	Assigned Date/Attribute Date	Program Name
	DSNP	Dummy	ALT5550064	1980-05-15	Low	70	OH	N/A	12/10/2019	N/A
	HOLLAND	MELISSA	80002157100	1954-12-26	Low	84	OH	N/A	12/09/2019	Intensive
	LUCAS	DAVID	80002159600	1954-12-04	Low	84	OH	12/12/2019	12/09/2019	High
	STOUT	RAYMOND	80002160100	1954-12-16	Low	84	OH	N/A	12/10/2019	Intensive

At the bottom, there is a pagination bar showing '1 - 4 of 4 items' and a '25 items per page' dropdown.

The logic to display the Eligibility Level Values in the Eligibility Level Value drop-down in Global search depends on the Levels assigned to the Care Staff.

- By selecting an Eligibility Level Value in Global Search, Members associated at that Eligibility Level and Level Value selected in the Global Search are displayed as search results, else no records would be displayed.
- The Additional Search Parameters list includes: Service Location, Eligibility, DOB, Risk, Program & Program Status, Age, Race, Gender, County and PSU. A combination of these parameters can be used as search criteria when a parameter is selected in the Additional Search.

From the Parameters drop-down list, the selected parameter appears as a new drop-down in the Search panel. For DOB search criteria, From and To Dates can be given to filter members with DOB within a time frame.

After performing the search, click **Save Search** to save and retrieve the results for later use.

- Click **Save & Set As Default** to save search while also setting the search criteria as default.
- You can choose to display the saved searches from the **Saved Search** drop-down.
- The **Set as Default** checkbox enables you to select / deselect a search as the default saved search.

## Dashboard

The Dashboard tab

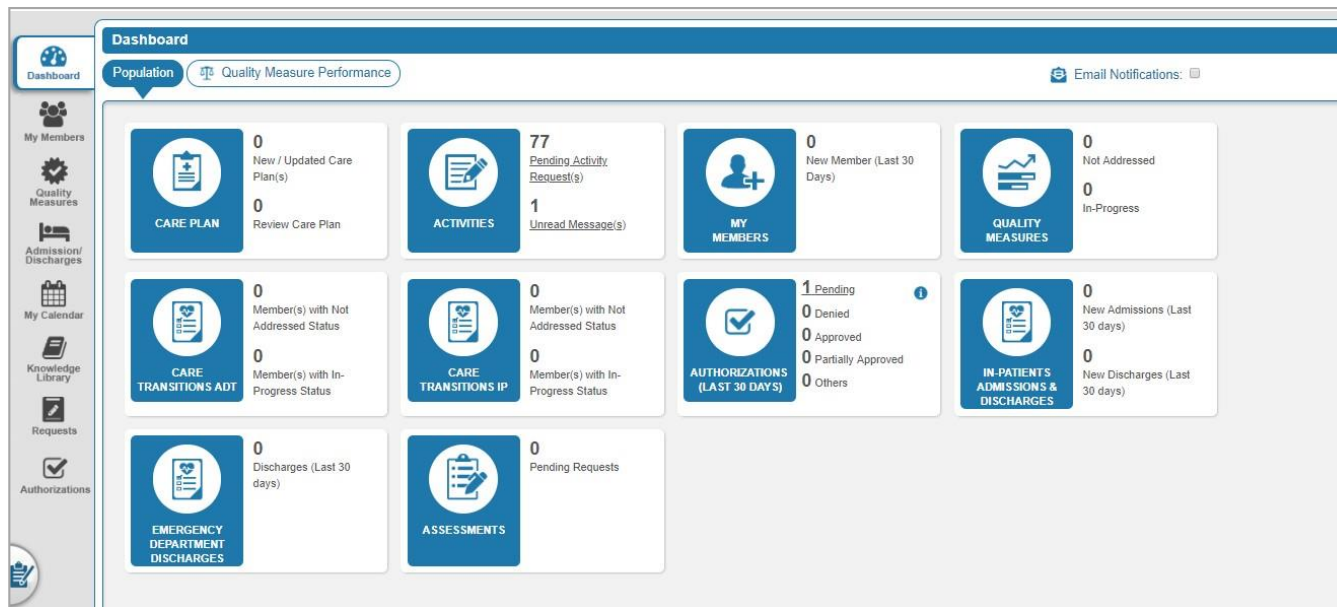


has the following sections:

- Population
- Quality Measure Performance

### Population

Population section includes the dashboard tiles. Display of each tile in this section depends on the Role configurations. If the User's role has access to the tile, it is visible, or else not.



## Care Plan

The Care Plan displays the total number of new Care Plans and updated Care Plans in addition to the review Care Plan Activities of the logged in User. Clicking on New/Updated Care Plan(s) navigates you to the Requests Received panel in the Requests left menu tab, which displays list of new and updated Care Plans of Members. The User can View/ Sign Off/ Reject a Care Plan from this section. Click on Review Care Plan to navigate to the Requests Received panel in the Requests left menu tab displaying list of members with Care Plan Reviews. To acknowledge a Care Plan, click on the Care Plan Review hyperlink.

**Request Received**

Care Plan Member Name From Date To Date

Member Name	Condition	Goal Name	Intervention	Start Date	Target Date
Mr. James, John	General	Goal: PT, Goal	Manual Intervention from hand	05/01/2018	05/31/2018
Mr. James, John	General	Goal: member requires environmental	Manual Intervention from hand	04/17/2018	04/18/2018
Mr. James, John	General	Goal: member requires environmental	Manual Intervention from hand	04/17/2018	04/18/2018
Mr. James, John	General	Goal: member requires environmental	Manual Intervention from hand	04/17/2018	04/18/2018
Mr. James, John	General	Goal: member requires environmental	Manual Intervention from hand	04/17/2018	04/18/2018
Mr. James, John	Medical (specialty)	Member will engage in TCM's Personal Program	Manual Intervention from hand	04/19/2018	01/19/2019

1 - 10 of 70 items

**Request Received**

Care Plan Rev. Member Name Referred/Acknowledged Date: Referred Date From Date To Date All

Member Name	Care Plan Review	Referred Date	Referred By	Acknowledged By	Acknowledged Date	Last Updated Date	Status	View Notes
Mr. James, John	Care Plan Review	05/16/2018	Rebecca Gonzalez	Rebecca Gonzalez	05/16/2018	05/16/2018 04:41 PM	Acknowledged	
Mr. James, John	Care Plan Review	05/16/2018	Rebecca Gonzalez	N/A	N/A	N/A	Pending	N/A
Mr. James, John	Care Plan Review	05/01/2018	Rebecca Gonzalez	N/A	N/A	N/A	Pending	N/A
Mr. James, John	Care Plan Review	05/01/2018	Rebecca Gonzalez	Rebecca Gonzalez	05/01/2018	05/01/2018 05:28 PM	Acknowledged	
Mr. James, John	Care Plan Review	04/30/2018	Rebecca Gonzalez	Rebecca Gonzalez	04/30/2018	04/30/2018 05:18 PM	Acknowledged	
Mr. James, John	Care Plan Review	03/01/2018	Rebecca Gonzalez	N/A	N/A	05/01/2018 05:35 PM	Closed	N/A

1 - 6 of 6 items

## Activities

Displays total number of pending Activity requests and unread messages. Clicking on Pending Activity Request(s) and Unread Message(s) redirects the User to the Requests Received panel to view the pending Activity requests and unread messages. The User can Accept / View / Reject a Care Plan from this section.

## My Members

The My Members section displays the total number of New Members assigned to the Provider (a Provider is added as part of External Care Team for these Members), within the last 30 days from current date.

- Clicking on New Member (Last 30 Days) navigates to the My Members left menu tab. My Members grid displays list of new Members assigned to the logged in Provider. The User can perform actions such as Add Activity, Add Appointment, and so on from the My Members page.

## Quality Measures

Displays the total number of Measures (of current reporting year) with In Progress and Not Addressed status applicable on Member(s) for a logged in User's population.

Clicking Count/In Progress/ Not Addressed navigates to Quality Measures left menu tab. The Quality Measures grid is auto populated with the reporting year in Measure Version and Quality Measure Group as the default display for all the Measures in Not Addressed, In Progress status respectively.

### Care Transitions ADT

Displays total number of Care Transitions of Members in In-progress and Not Addressed status. User is navigated to the Admissions/Discharges section of Members with Care Transitions ADT or ER Admission and Discharge Transfer information of Members. This ADT data is extracted from the HL7 associated with each member.

### Care Transitions IP

Displays total number of Care Transitions of Members in In-progress and Not Addressed status. User is navigated to the Admissions/Discharges section of Members with Care Transitions IP or In-Patient admission/Discharge events of Members.

### Authorizations

Authorizations should not be entered here. Please continue to enter them as you have in the past.

### In-Patients Admissions & Discharges

Displays the count of New Admissions & New Discharges in the last 30 days. Clicking on the hyperlink of New Admissions (Last 30 Days), User is navigated to IP Authorizations page under Admission & Discharges tab.

### Emergency Department Discharges

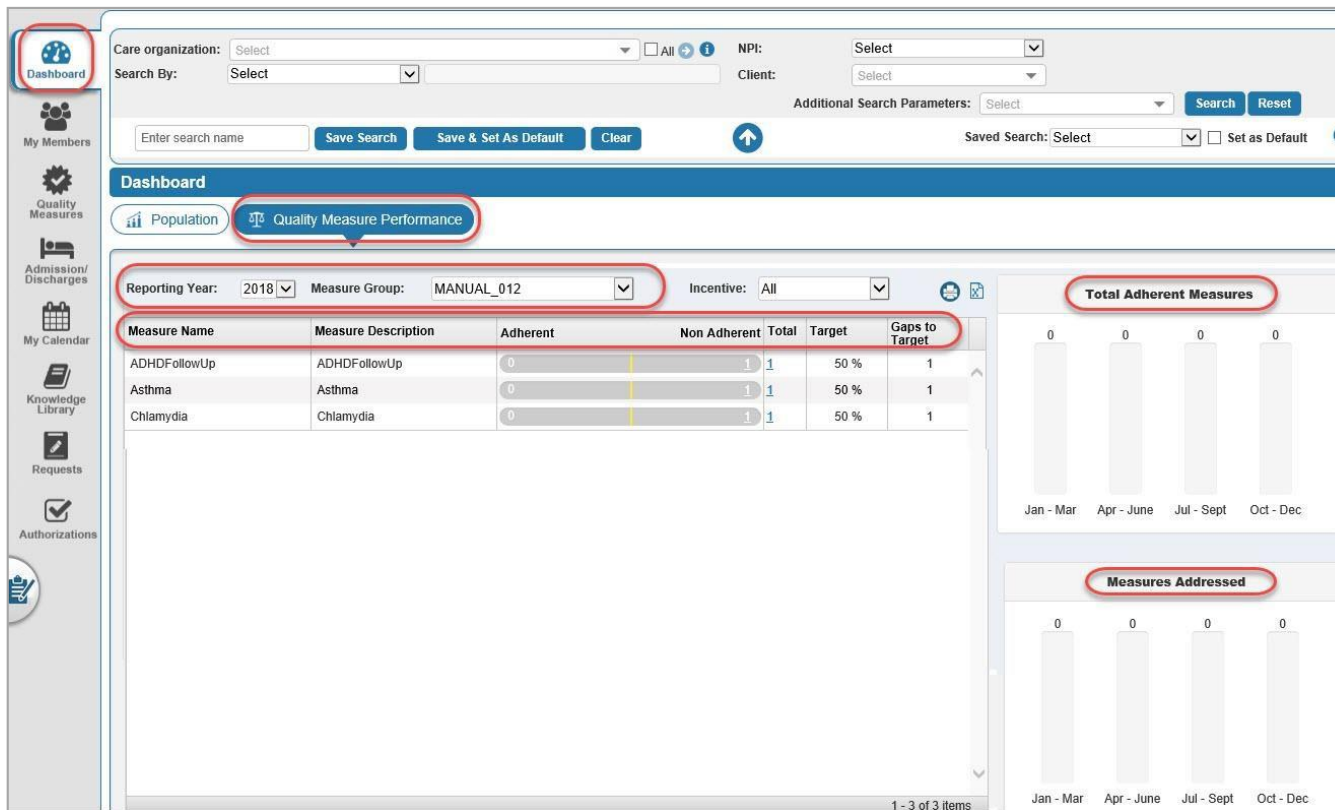
Displays the counts of discharge records for the last 30 days with event type A03 with a hyperlink to the Admission & Discharges section.

### Assessments

Displays the pending Assessment count (Script Forms) due for a Provider's review. Care Staff can now send **Assessments (Script Forms)** for review to one or more Providers (External Providers). The Completed/Pending Script Form on a member can be sent for review. Clicking on the hyperlink navigates the User to the Request Received >> Assessments section.

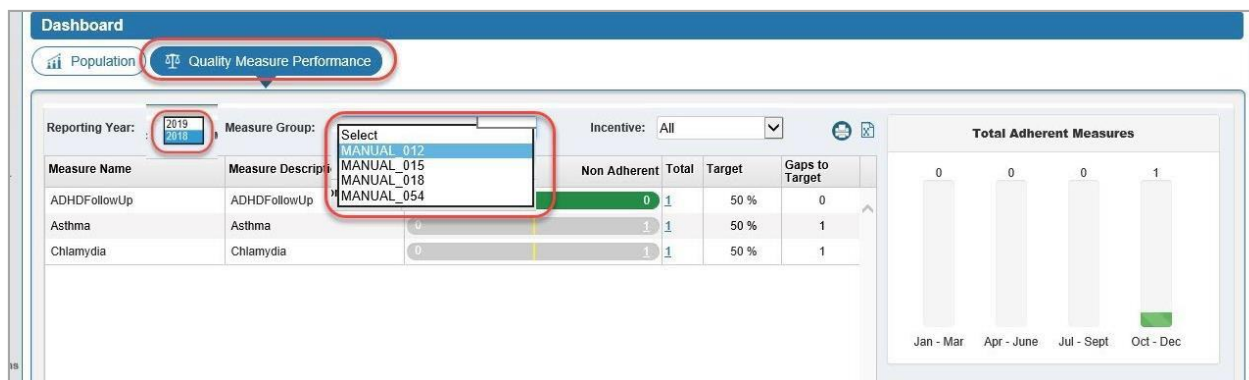
## Quality Measure Performance

The Quality Measure Performance tab displays the list of Quality Measures with Measure Description and count of Adherent and Non-Adherent Measures, Target and Gaps to Target. This page also displays a view of Total Adherent Measures and Measures Addressed bar graphs.



## Search Quality Measure Groups

You can search for Quality Measure Groups using the Global Search criteria:





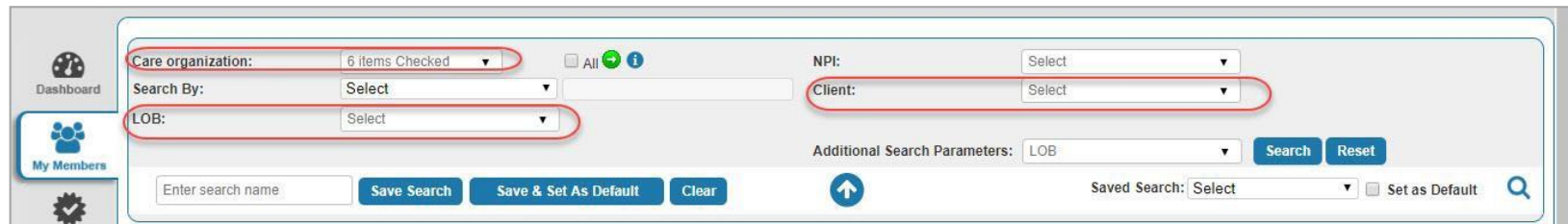
**For Provider Users:**

- Select TIN value from the Care Organization drop-down. States are associated with TINs.
- Click Search.

The Measure Groups associated with selected TIN and State will populate in the Measure Group drop-down as shown above.

**For Internal Users:**

- Select Client / TIN / LOB and click Search.

A screenshot of a web application's search interface. On the left is a sidebar with icons for 'Dashboard', 'My Members', and a settings gear. The main search area contains several filters: 'Care organization:' with a dropdown showing '6 items Checked', 'Search By:' with a 'Select' dropdown, 'LOB:' with a 'Select' dropdown, 'NPI:' with a 'Select' dropdown, and 'Client:' with a 'Select' dropdown. Below these are 'Additional Search Parameters:' with a 'LOB' dropdown, and 'Search' and 'Reset' buttons. At the bottom are buttons for 'Enter search name', 'Save Search', 'Save & Set As Default', and 'Clear'. On the right, there is a 'Saved Search:' dropdown showing 'Select' and a 'Set as Default' checkbox.

The Measure Groups associated with selected TIN and/or LOB, and/or Client will populate in the Measure Group drop-down.

Click  to print the Measure Group data. Click  to export Measure Group data in excel format

---

**-Users can opt in/out of receiving an email notification using the E-mail Notifications check-box.**



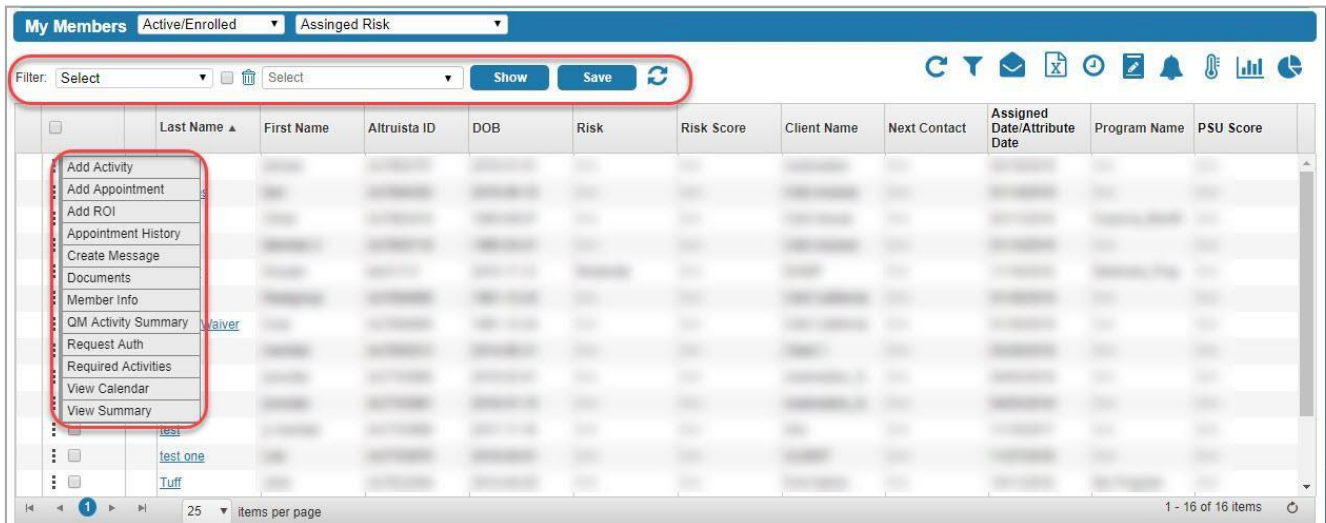
**-If the E-mail Notifications check-box is selected, system displays a confirmation message “Notifications successfully opt in for email”. Upon hovering E-mail Notifications with the check-box selected, the system displays a text “Notifications to be sent to test@gmail.com”**

**-If the E-mail Notifications check-box is unselected, then system displays a confirmation message “Notifications successfully opt out for email.” Upon hovering E-mail Notifications with the check-box selected, system displays a text “To receive email notifications to test@gmail.com”**

---

# My Members

This page displays the list of members assigned to the logged-in User.



Select a member record to perform the following functions:

- **Add Activity** – You can add an Activity for the Member from ADD ACTIVITY pop-up window.
- **Add Appointment** – Appointments are added for the Member with the required Provider.
- **Add ROI** – You can add ROI for the Member.
- **Appointment History** – Displays Appointment history of the Member.
- **Create Message** – Allows you to send a HISP-direct or internal message to another Provider, Care Staff or Member.
- **Documents**– Allows you to attach a C-CDA file or document in ATTACH FILE/ DOCUMENT pop-up window.
- **Member Info** – Allows you to view the Member Information in single view.
- **QM Activity Summary**: Displays list of Quality Measure Activity Details.
- **Required Activities** – Displays list of mandatory Activities that must be performed for the Member.
- **View Calendar** – You can view a Member's calendar for scheduled Activities.
- **View Summary** – Displays summary of Member's care details in VIEW SUMMARY pop-up window.

**VIEW SUMMARY**

[+/-Expand all](#)

Member Name (F-M-L) :	testttttttttttttt nnnnnnnnnnnn	Gender :	F
Date of Birth :		Marital Status :	Not Available
Expected Risk Level :	Not Available	Altruista ID :	
Ethnicity :	Not Available	Primary Language :	Not Available
Service Interruption :	Not Available	Preferred Written Language(s) :	Not Available
Address :		Evacuation Zone :	Not Available
Fax :	Not Available	Phone :	Not Available

- ▶ Member Medical Info
- ▶ Additional Information
- ▶ Programs
- ▶ Opportunity
- ▶ Member Care Plan
- ▶ Member Medical Conditions
- ▶ Claim Based Medications
- ▶ Claim Based Diagnosis
- ▶ Claims

**In My Members sections, Context menu options are alphabetized.**

## Configuring Columns in My Members Grid

## My Members – Font Color of Member Records

Member records whose eligibility is expired is shown with a **red** icon and **orange** icon for the alert time configured for Required Activities.

Last Name	PCP Name	ER Visits	Risk	Risk Score	Client Name	Next Contact	Assigned Date/Attribute Date	PSU Score	PCP Name	ER Visits
Automation	Automation	0	16-01-01	N/A	Automation	N/A	06/05/2018	N/A	N/A	0
123456789	123456789	0	18-11-12	N/A	123456789	N/A	02/05/2019	N/A	Parent Provider	0
123456789	123456789	0	19-01-29	N/A	123456789	N/A	02/05/2019	N/A	Parent Provider	0
A_Client1	A_Client1	0	19-01-22	N/A	A_Client1	N/A	02/05/2019	N/A	Parent Provider	0

-Member records in My Members widget turns red when the only active record in Member's Programs section turns inactive and there are no other active records in programs for that Member which has Required Activities configured.



-If the Member is enrolled in multiple lines of business, and Member has termed eligibility for one LOB, the record will not turn red since Member has another active LOB(s).

-The Required Activities configured for Care Transition in Population Health (Member records in ADT section) against Program enrollment LOB/Plan/Program are not considered for the logic of turning Member record to orange or red.

## Viewing Member's Family Member Records

To view the family member records of a member in My Members grid, click  icon seen next to a Member record. The records are displayed if the family member records are available for the selected member as shown:

My Members Active/Enrolled Assigned Risk										
Filter: Select		Select		Show		Save				
	Last Name	First Name	Altruista ID	DOB	Risk	Risk Score	Client Name	Next Contact	Assigned Date/Attribute Date	PSU Score
					N/A	N/A	Automation	N/A	06/05/2018	N/A
					N/A	N/A	BK_CLIENT	N/A	02/21/2019	N/A
					N/A	N/A	VNS123456780	N/A	06/30/2017	N/A
					Critical	900	Automation	03/20/2019	09/17/2018	N/A
	Test				N/A	N/A	MVC IMP CLIENT	N/A	06/30/2017	N/A
					N/A	N/A	CLIENT	N/A	07/07/2017	N/A
					N/A	N/A	Automation_Sel...	N/A	06/05/2018	N/A
					N/A	N/A	Hypoxia-Client	N/A	03/21/2018	N/A
					N/A	N/A	4131_Client	N/A	04/30/2018	N/A
					N/A	N/A	CLIENT	N/A	07/07/2017	N/A

For members that are marked as Sensitive Diagnosis, the logged in User cannot access the member record. The last name hyperlink to Member Summary is disabled for such records as shown.

My Members Active/Enrolled Assigned Risk										
Filter: Select		Select		Show		Save				
	Last Name	First Name	Altruista ID	DOB	Risk	Risk Score	Client Name	Next Contact	Assigned Date/Attribute Date	PSU Score
	BK	Bk			N/A	N/A	BK_CLIENT	N/A	02/21/2019	N/A
	DEMO2	Mobile cong			N/A	N/A	VNS123456780	N/A	06/30/2017	N/A
					Critical	900	Automation	03/20/2019	09/17/2018	N/A
					N/A	N/A	Automation_Sel...	N/A	06/05/2018	N/A
					N/A	N/A	Hypoxia-Client	N/A	03/21/2018	N/A
					N/A	N/A	4131_Client	N/A	04/30/2018	N/A
					N/A	N/A	CLIENT	N/A	07/07/2017	N/A
					N/A	N/A	Automation	N/A	02/11/2019	N/A
					N/A	N/A	PH_CM_Client	N/A	06/19/2018	N/A



- When there is sensitive data for the Member record, External Care Staff with the role permissions to Activities /
- Request can Complete the activities that are assigned to either the User or Care Organization.
- Users can add only the Completed Activity when there is sensitive data for the Member record.
- Activity Outcome and Outcome Type are mandatory fields when an Activity is completed.

In My Members section, when the User clicks Export Excel icon, a description line “Choose columns of My Members to Export files to Excel” is added as shown. This line is to help the Users find where documents are exported and should be noted to help Users can find the records.

# Quality Measures

The Quality Measures section displays open Opportunities, or prospective gaps-in-care, that currently exist for members assigned to a Provider across all relevant Quality Measures. To address the Quality Measures for the members in the Provider's case load, you can perform steps such as adding Activities / Appointments, Create Message etc. The scorecard count in Quality Measures grid includes the Measures marked as Is Sensitive. For member records marked as Is Sensitive, the User cannot access the Member Details page and view the Measure performance under the Quality Measure Performance tab in the Dashboard.

The screenshot shows the 'Quality Measures' section of a dashboard. At the top, there are search filters for Care organization, Search By, NPI, Client, and Additional Search Parameters. Below these are buttons for 'Save Search', 'Save & Set As Default', and 'Clear'. The main table has columns for Scorecard, Last Name, First Name, DOB, Altruista ID, Client Name, RISK SCORE, PSU SCORE, ADHDFollowUp, and Asthma. A context menu is open over the first row, showing options like 'Add Activity', 'Add Appointment', 'Appointment History', 'Create Message', 'QM Activity Summary', 'Required Activities', 'View Member Summary', and 'View Notes'. The table shows a 100% scorecard for a member named Paul, with 'ADHDFollowUp' and 'Asthma' measures marked as 'In Progress' (blue 'i' icon) and 'Not Addressed' (red triangle icon).

Based on the proportion of Opportunities resolved for each Member, a Scorecard is calculated as follows:

$$\text{SCORECARD} = \text{Opportunities resolved \& closed} \div \{\text{Total Opportunities} - \text{Opportunities Not Applicable}\}$$

The Quality Measures can be in different statuses based on whether they are addressed or not by the Provider.

: Not Applicable

: Not Addressed

: In Progress

 : Completed

 : Verified

 : Compliance

Status of Opportunities is indicated as shown:

Initial Status	Action Performed by User	Status Updated To
 Alert (Opportunity not Addressed)	Action Planned	 In Progress
	Action Completed	 Opportunity is resolved
	Not an Issue/Other	 Opportunity is not applicable
	Action Verified	 Verified
 In Progress	This action completed	 Opportunity is resolved
	Action Verified	 In Progress
	Not an Issue/Other	 Opportunity is not applicable
	Other action scheduled	 Verified
	Revert to Not Addressed	

- In the Quality Measures section, you can view and update the status of each open and addressed Opportunity for a member.
- Select Revert to Not Addressed, to revert decisions.
- To address all the gaps for a member:
  - Click on the Scorecard.
  - Select Resolve Gaps for this Member
  - Select all the gaps within the Progress/Not Addressed Status
  - Click Perform Action.
  - Select the required option in the Bulk Action Perform window.
  - Click Perform Action.

Quality Measures

Admission/Discharges

My Calendar

Knowledge Library

Requests

Authorizations

Quality Measures

Measure Version: 2018

Quality Measure Group: Default

In Progress

Export Excel

Scorecard	Last Name	First Name	DOB	Altitude ID	Client Name	RISK SCORE	PSU SCORE	bim:opp	Consider asses...
100%	DA, David	DA, David	03-22-1990	ALT623244	bimclient	N/A		—	—
75%	DA, David	DA, David	12-02-1999	ALT602559	test client	N/A	N/A	C	—
60%	DA, David	DA, David	06-22-2010	ALT592539	VNSNY	N/A	N/A	—	C
50%	DA, David	DA, David	10-05-2016	ALT_0001	VNS123456780	1	25	C	i
60%	DA, David	DA, David	01-27-2009	789	VNS123456780	N/A	N/A	—	—
100%	DA, David	DA, David	01-04-1962	ALT602564	M&R Alabama	N/A		—	—
100%	DA, David	DA, David	06-01-2015	ALT633319	VNS123456780	N/A	N/A	—	—
13%	DA, David	DA, David	12-09-1999	12345	DBTest	N/A	3597979946	C	—

Total Care Opportunities : 51

1 25 items per page

C bim:opp: Complete

bim:opp

UpdatedBy: subbuProvider

UpdatedOn: 4/17/2018 4:52:24 AM

☐ Action Verified
 ☐ Other Action Scheduled
 ☐ Revert to Not Addressed

Notes:

Perform Action Add Activity

Consider asses: Not Addressed

Consider assessing the members fall status

UpdatedBy: N/A UpdatedOn: N/A

☐ Action Planned
 ☐ Action Completed
 ☐ Action Verified
 ☐ Not an Issue/Other

Notes:

- To change the status for all Gaps with In Progress status for all Members, perform the following steps:



**Quality Measures**

Measure Version: 2018 Quality Measure Group: Default

**Scorecard**

Scorecard	Last Name	First Name	DOB	Altruista ID	Client Name	RISK SCORE	ADHDFollowUp
100%	DA, JAMES	DA, JAMES	03-22-1990	ALT623244	blmclient	N/A	C
75%	DA, JAMES	DA, JAMES	12-02-1999	ALT602559	test client	N/A	V
60%	DA, JAMES	DA, JAMES	06-22-2010	ALT592539	VNSNY	N/A	N/A
50%	DA, JAMES	DA, JAMES	10-05-2016	ALT0001	VNS123456780	1	25
60%	DA, JAMES	DA, JAMES	01-27-2009	789	VNS123456780	N/A	N/A
100%	DA, JAMES	DA, JAMES	01-04-1962	ALT602564	M&R Alabama	N/A	N/A
100%	DA, JAMES	DA, JAMES	06-01-2015	ALT633319	VNS123456780	N/A	N/A
15%	DA, JAMES	DA, JAMES	12-09-1999	12345	DBTest	N/A	35979797946

Total Care Opportunities : 50

1 - 8 of 8 items

**IN PROGRESS MEASURES LIST**

Measure Name: Search

**Select one or more than one record and click In Progress**

Measure Name	First Name	DOB	Performed By	Performed On
2A-new opportunity	Test	1/27/2009	Nirosha Provider	05/07/2018
Consider assessing the members fall status	Test	9/05/2016	Nirosha Carestaff	04/17/2018
Asthma	Test	01/27/2009	Nirosha Provider	05/07/2018
Assist with language barrier	MTM	12/09/1999	subbu Kollipara Provider	03/28/2018
ask him to consult an doctor	Test12	10/05/2016	Nirosha Carestaff	03/21/2018
ADHDFollowUp	MTM	12/09/1999	subbu Kollipara Provider	05/08/2018

1 - 6 of 6 items

**Bulk Action Perform**

**In Progress**

- ☐ This action completed
- ☐ Action Verified
- ☐ Other Action Scheduled
- ☐ Not an Issue/Other

Select appropriate option to change the status



In the Quality Measures section, when a User clicks Export Excel icon, a description line 'Choose columns of Quality Measures to Export files to Excel' is added as shown. This line is to help Users locate where the documents are exported.

**Quality Measures**

Measure Version: 2018 Quality Measure Group: Default

**Scorecard**

Scorecard	Last Name	First Name	DOB	Altruista ID	Client Name	RISK SCORE	bre test
100%	DA, JAMES	DA, JAMES	06-31-2014	ALT602828	Client 1	N/A	V

**EXPORT TO EXCEL**

Choose columns of Quality Measures to Export files to Excel

Select Columns: Select Check All Export

# Admissions/Discharges – Coming Soon!

This section displays the In-patient and ER admission and discharge transfer (ADT) information of Members. This data is extracted from the HL7 associated with each Member. It displays enrolled Members in the Care Transition program for the past three months by default.








- You can view information in this panel from two different sources: Admission/Discharge Transfer (ADT) or Inpatient (IP) Authorizations.
- Select the appropriate option from the drop-down list at the top of the grid as shown below.

The screenshot shows a web application interface for 'Admission/Discharges'. On the left is a sidebar with icons for Dashboard, My Members, Quality Measures, Admission/Discharges (highlighted), My Calendar, Knowledge Library, Requests, and Authorizations. The main area has a search bar with fields for 'Care organization', 'Search By', 'NPI', 'Client', and 'Additional Search Parameters', along with 'Search' and 'Reset' buttons. Below the search bar is a section titled 'Admission/Discharges' with a filter dropdown set to 'ADT'. Other filters include 'Admission/Discharge: Load Date', 'From Date: 11/30/2017', 'To Date: 03/20/2019', 'Event Type: Select', and 'Class: Select'. There are also buttons for 'In progress', 'Config Columns', 'Receive Care Transition Notifications', and 'Export to Excel'. A table with 20 columns is displayed, including Last Name, First Name, DOB, Admit Date, Facility Name, Event Type, Disch... Date, Ack Disch..., Disch... Ack/Un-Ack On, Disch... Ack/Un-Ack By, My Care Manager, Medic..., Altruista ID, Load Date, Client Name, PSU Score, Next Activity, Script, Activity Due Date, and Status. The first row shows a member with a status of 'i' (info), and the second row shows a member with a status of 'C' (complete).



	Last Name	First Name	DOB	Admit Date	Facility Name	Event Type	Disch... Date	Ack Disch...	Disch... Ack/Un-Ack On	Disch... Ack/Un-Ack By	My Care Manager	Medic...	Altruista ID	Load Date	Client Name	PSU Score	Next Activity	Script	Activity Due Date	Status
+					Kardlec														N/A	i
+					Center														N/A	C

- ADT displays list of members within the records type.

- Click  to view the list of ADT records and their statuses with respect to each member as shown.

Admission/Discharges													
ADT	Admission/Discharge:	Load Date	From Date:	02/14/2018	To Date:	05/15/2018	Event Type:	Select	Class:	Select			In progress
<a href="#">Config Columns</a> <a href="#">Receive Care Transition Notifications: <input checked="" type="checkbox"/></a> <a href="#">Export Excel</a>													
	Last Name	First Name	DOB	Altruista ID	Risk Score	Load Date	Admit Date	Facility Name	Event Type	Discharge Date	PSU Score	Activity Due Date	Status
	member alo...	test	02/02/2010	ALT703815	N/A	03/07/2018	09/16/2015 20:51:19	Valley Medical Center	A03 : Discharge/End Visit	03/25/2018	N/A	N/A	
<div> <div>Load Date</div> <div>Admit Date</div> <div>Facility Name</div> <div>Event Type</div> <div>Discharge Date</div> <div>Activity Due Date</div> <div>Status</div> </div> <div> <div>0</div> <div>No items to display</div> </div>													
+			01/02/1989	ALT683522	N/A	03/07/2018	09/16/2015 20:51:19	Valley Medical Center	A03 : Discharge/End Visit	03/25/2018	N/A	N/A	
+			01/04/1962	ALT602564	N/A	03/04/2018	03/03/2017 00:00:00	Kadlec Regional Medical Center	A03 : Discharge/End Visit	03/24/2018	N/A	N/A	
+			11/24/1998	ALT694401	N/A	03/04/2018	04/04/2017 00:00:00	Kadlec Regional Medical Center	A03 : Discharge/End Visit	03/24/2018	234568...	N/A	

You can also update the status of an ADT record.

- User can perform functions like adding an appointment, sending messages, etc. at the level of record of a Member in Admission/Discharges page by clicking the 
- When you select the drop-down icon  next to Last Name of a member on the Admission/Discharges page, a context menu opens as shown.

Add Activity
Add Appointment
ADT Summary
Appointment History
Create Message
QM Activity Summary
Required Activities
View Member Summary
View Notes

-Refer My Members section for context menu details.



-Using ADT Summary option, you can view Member's EMR details.

-User can add Additional columns to the grid by selecting the columns from the Config Columns button

-In Admission/Discharges >> ADT section, when the User clicks Export Excel icon, a description line "Choose columns of ADT to Export files to Excel" is added to help the Users find where Documents are exported to and where Users can find the records.

When you select IP Authorizations from the drop-down list, it displays the details of Inpatient Admission/Discharge events of Members.

	Last Name	First Name	Altruista ID	Case ID	Load Date	Admission Date	Discharge Date	Discharge Disposition	RPM Score	Facility	Case Status	Case Type
+			ALT694401	1010101292	01/05/2017	12/30/2016	03/14/2018	Discharge to Home or Self Care	0.150000000...	WESLEY MEDICAL CENTER	Voided Case	Maternity
+			ALT633319	1010101276	01/03/2017	12/03/2016	03/14/2018	Discharge to Home or Self Care	0.150000000...	DOVER BEHAVIORAL HEALTH SYSTEM	Voided Case	Maternity
+			ALT694472	1010101296	01/03/2017	12/03/2016	03/14/2018	Discharge to Home or Self Care	0.150000000...	WOODLANDS AT AUSTINWOODS	Voided Case	SNF
+			ALT703871	1010101286	01/03/2017	12/03/2016	03/14/2018	Discharge to Home or Self Care	0.150000000...	WOODLANDS AT AUSTINWOODS	Voided Case	SNF

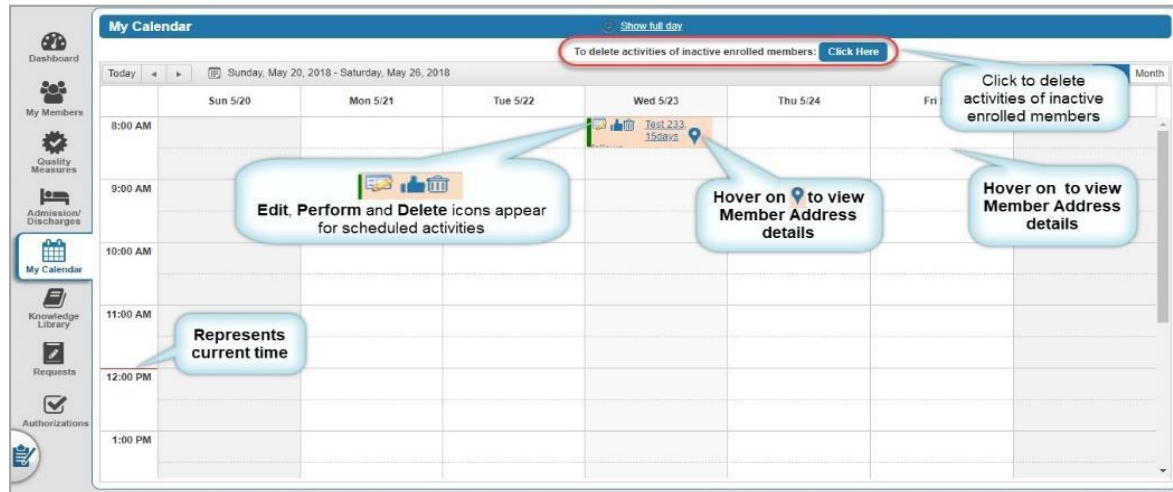


In Admission/Discharges >> IP section, when the User clicks Export Excel icon, a description line “Choose columns of IP to Export files to Excel” is added to help the Users find where Documents are exported to and where Users can find the records.

Altruista ID, RPM Score, Case ID, Load Date values are added in the Export to Excel drop-down Admission/Discharges>> IP Authorizations.

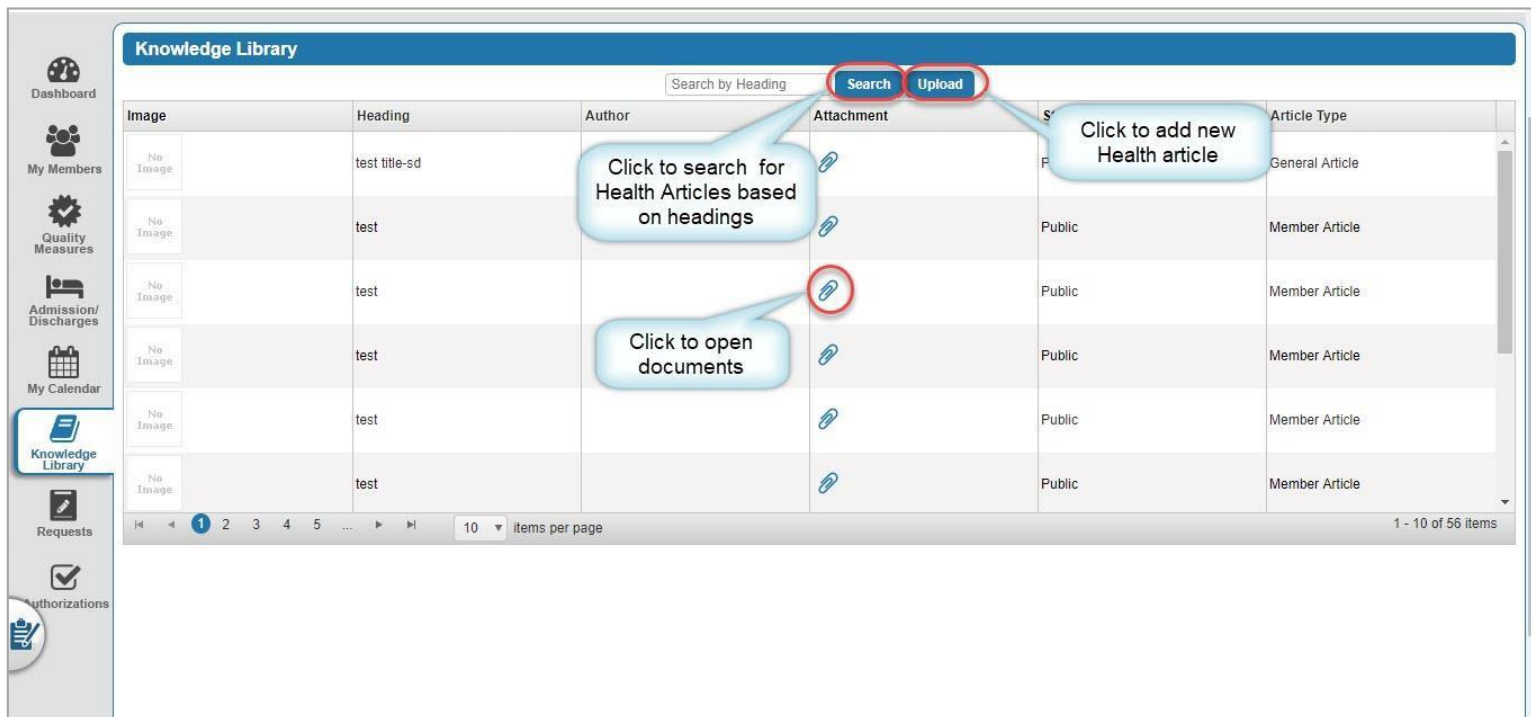
## My Calendar

This page displays scheduled Activities/Appointments for members. The logged-in User performs the scheduled Activities from the Calendar by clicking. 



## Knowledge Library

This page enables the logged-in User to view and upload the educational material/health articles.



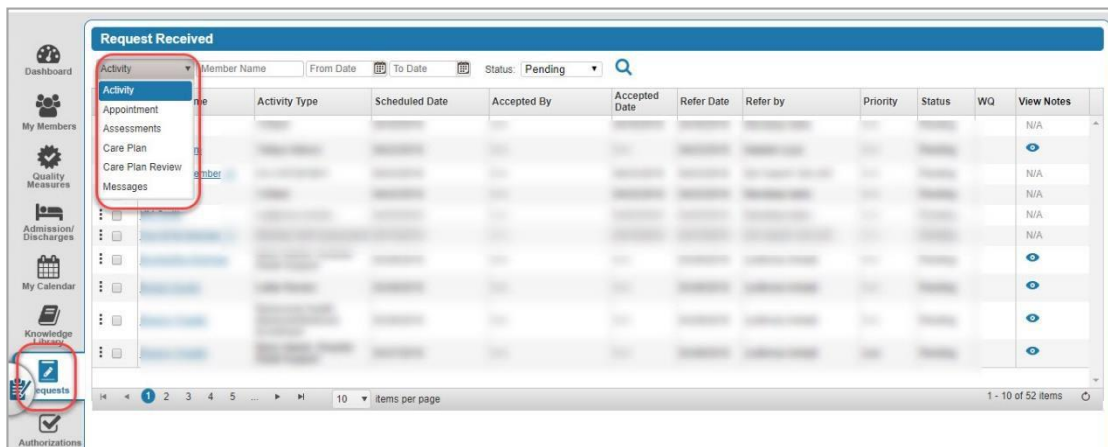
# Requests

This tab displays the requests for Activity, Appointments, Assessments, Care Plan Review and Message that are referred by other Provider Users or Care Staff.

## Request Received

To view the requests, click the Requests tab.

REQUEST RECEIVED tab appears as shown:



The types of Requests a logged-in User can receive are:

- Activity
- Appointment
- Assessments
- Care Plan
- Care Plan Review
- Messages

---

-Context menu options are added to the Care Plan Review section.



-Context menu options are role based, they can be enabled/disabled based on the role permission given to the logged in User.

-Users can select one or more Member records from Request Received >> Care Plan Review section and export the Care.

-Plan(s) of the selected Member records to PDF as shown.

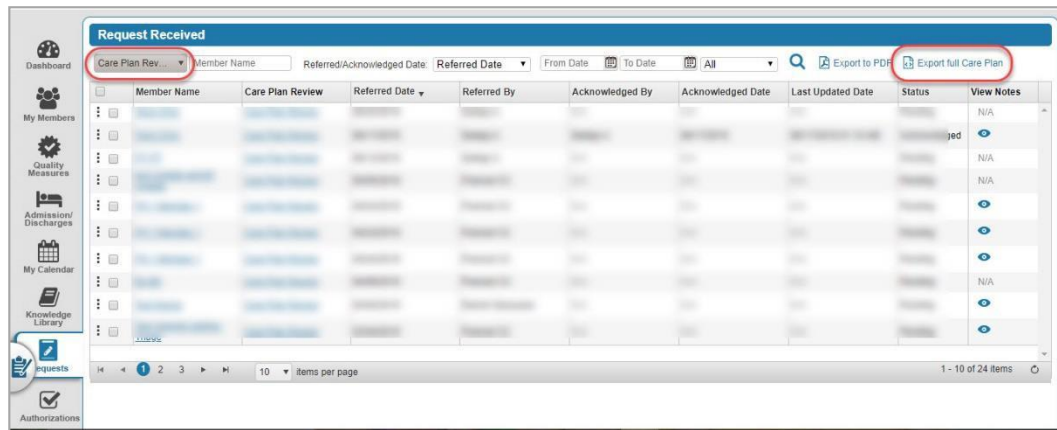
---

The screenshot shows a web application interface titled 'Request Received'. On the left is a sidebar with icons for Dashboard, My Members, Quality Measures, Admissions/Discharges, My Calendar, Knowledge Library, requests, and Authorizations. The main area contains a table with columns: Member Name, Care Plan Review, Referred Date, Referred By, Acknowledged By, Acknowledged Date, Last Updated Date, Status, and View Notes. The table lists several member records. Above the table, there are filters for Member Name, Referred/Acknowledged Date, and Referred Date. To the right of the table, there are two buttons: 'Export to PDF' and 'Export full Care Plan', both of which are circled in red. The bottom of the interface shows a pagination bar with '1 - 10 of 24 items' and '10 items per page'.

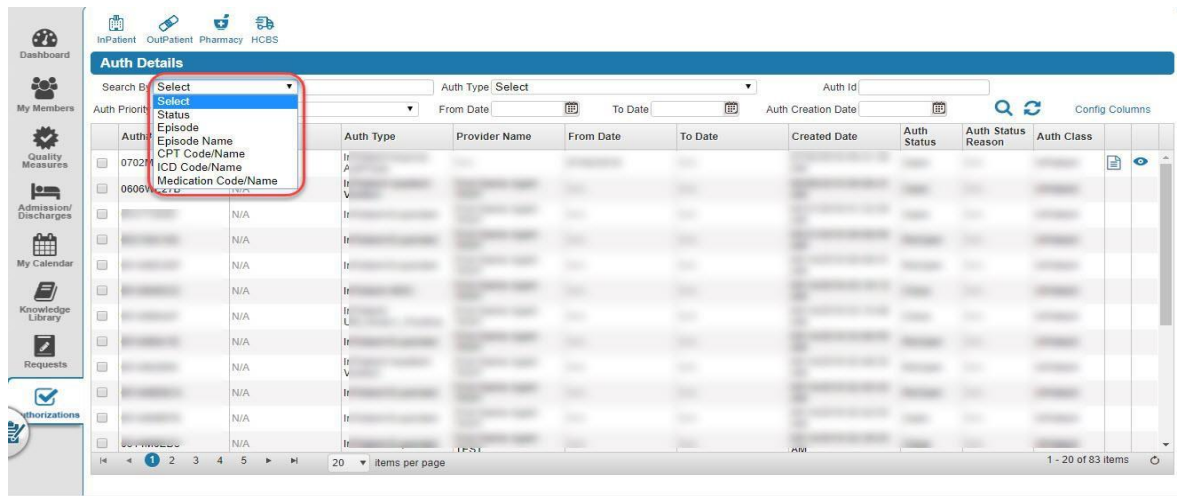
Member Name	Care Plan Review	Referred Date	Referred By	Acknowledged By	Acknowledged Date	Last Updated Date	Status	View Notes
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	N/A
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	N/A
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	N/A
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	N/A
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	N/A
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	N/A
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	N/A

- The Comments/Notes section in the Care Plan Review section is a non-mandatory field. The User can acknowledge the Care Plan Review record without entering any comments/notes.
- Users can 'Export Full Care Plan' while reviewing the Care Plan Request details in Request section as shown:





- Targeted Interventions' is added in the Review Care Plan pop-up when the User clicks on Review Care Plan hyperlink to acknowledge the Care Plan. This accordion appears between Care Team and Clinical Interventions accordions.
- You can accept multiple Pending Activities with Acceptance notes.
- You can view Pending Activities assigned to External Care Team Provider in the Requests Received section.



- On clicking Pending Activity Requests, system navigates you to Request Received section with Activity as pre-selected drop- down value in the Request Received section.



**GA-MED-P-138833**

**DCH Approved: 6/4/20**

**2019 Altruista Health, All Rights Reserved – Privacy Policy | Terms of Use**