Merative ™ Integrated Care

Release Notes January 2023

Note

Before using this information and the product it supports, read the information in Notices *(on page xii)*

Edition

This edition applies to Merative ™ Integrated Care.

Contents

Chapter 1. Merative ™ Integrated Care Release Notes

Welcome to the January 2023 release of Merative ™ Integrated Care.

Introduction

In this release, we added enhancements to some of the existing features in Merative ™ Integrated Care, and further views to the bring-your-own-tool (BYOT) reporting solution.

To watch a video of the enhancements and the BYOT reporting views that have been included in the January 2023 release, see the show and tell January 2023 videos:

- Show and tell January 2023 with captions
- Show and tell January 2023 without captions

For a full list of show and tell videos, see the product videos page on the Merative Support Documentation site.

For you to more easily identify the changes that apply to your instance of Merative ™ Integrated Care, updates are tagged as follows:

- **Merative ™ Integrated Care** - these updates are for all Merative ™ Integrated Care customers.
- **Reporting** - these items apply to all Merative ™ Integrated Care customers using Merative ™ Integrated Care Reporting.
- **Service Providers** - these items apply to Merative ™ Integrated Care customers with the Providers feature enabled.
- **Organization Units** - these updates are for all Merative ™ Integrated Care customers with Organization Units enabled.
- **Community Service Referral** - these items apply to customers who have licensed the Merative ™ Integrated Care Community Service Referral add-on.
- **Community Service Payment** - these items apply to customers who have licensed the Merative ™ Integrated Care Community Service Payment add-on.
- **Connect Providers** - these items apply to customers who have licensed the Merative ™ Integrated Care Connect Providers add-on.
- **Connect Individuals** - these items apply to customers who have licensed the Merative ™ Integrated Care Connect Individual add-on.
- **Connect 360** - these items apply to customers who are integrated with the IBM Health and Human Services Connect 360 application.

What's new for reporting

Bring your own tool

Reporting

In this release, Merative ™ Integrated Care reporting has continued to expand the views available in the BYOT reporting solution. We have added some new views to the Clinical and Vital views category, which allow you to report on a client's clinical and vital data, such as client’s weight or respiratory records. We have also included additional views in the Providers category and one new view in the Client category which allow you to report on the history of a referral. For the full list of views that are available, see the Merative ™ Integrated Care reporting data catalog here.

What's new for administrators

- **Longer answers in assessments and questionnaires**

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  To allow administrators to configure standardised assessments/questionnaires as they are specified, we have introduced the ability to enter answer options of up to 200 characters. When configuring a question with long answer options in an assessment or questionnaire, it is preferable to use a radio button list instead of a drop-down list. This improves the readability of the answer when it is displayed in the assessment or questionnaire in the care team application.

What's new for care teams

- **Create a Share Care Plan PDF for selected sections and a specified date range**

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  To give care team workers access to concise user-friendly reports, and to allow them to quickly generate reports as needed, we have introduced the ability to generate Share Care Plan PDFs for selected sections and a specific time period.

- **Deleting client goals**

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  To only allow certain care team members to delete client goals, a new role-based access control (RBAC) resource has been introduced. If a care team worker is assigned a security role by a security administrator, which grants access to the new Delete Goals resource, they can delete client goals. If a care team worker is not given access to the Delete Goals resource, the delete goal action is hidden from the care team worker.

- **Adding new referrals from a client's Referrals list page**

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  To allow care team workers to more easily review and create referrals for a client, we have introduced the ability to create a referral from the client's referral page, where existing referrals can be reviewed. When a new referral is added from the client's Referral list page, the Referral list page refreshes and displays the newly created referral.

- **Adding comments to referral assignment**

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  To allow care team workers to record a comment when assigning a referral, we have introduced a new comment field.

- **Viewing referrals history and comments**

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  To allow care team workers to view all updates and comments to a referral, we have introduced a new history section in referrals. For open referrals, you can view the assignment history, such as who was assigned the referral or if the referral has been unassigned, including all comments entered. If a referral was accepted or rejected, you can view all the details and comments related to that in the new history section. This is visible from a care team worker's My Referrals page, the Unassigned Referrals page and the Client's Referrals page.

What's new for security administrators

- **Configuring Delete Goals RBAC resource**

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  To allow a security administrator to control if a user can or cannot delete client goals, we have introduced a new RBAC resource called Delete Goals. A security administrator can grant or deny access to this RBAC resource within a user's security role. If a user does not have access to Delete Goals, the delete goal action is hidden from that user. This resource is automatically set to Access in all existing security roles, until those roles are changed by the security admin manually.

What's new for supervisors

- **Viewing referrals history and comments**

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  To allow supervisors to view all updates and comments to a referral, we have introduced a new assignment history section in referrals. You can view the assignment history, such as who was assigned the referral or if the referral has been unassigned, including all comments entered. This is visible from a supervisor's unassigned and assigned referrals pages.

- **Adding comments to referral assignment**

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  To allow supervisors to record a comment when assigning a referral, we have introduced a new comment field.

What's new for integrations and APIs

- **Add to Plan row action on External Inquiries can only be selected once**

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  The Add to Plan row action on the External Inquiries list page, could be selected multiple times. Each time this action was selected, the External Inquiry API was triggered. To prevent this, the Add to Plan row action is now disabled once it is selected by the user. This ensures that the API is triggered just once.

- **Including Add to Plan in the External Inquiries API**

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  Including Add to Plan in the External Inquiries API effectively closes the loop on the referral. The provider is informed that the service has been added to the client’s plan.

- **Add Service Delivery ID to Notes API**

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The existing Notes API has been updated to include the Service Delivery ID. This enables external providers to provide feedback via API, on a service offered or provided to a client.

Known issues

Known issues identified in the current release:

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- When completing an assessment or questionnaire in the care team application, answers with a large number of characters are not wrapping correctly in drop-down lists in some screen resolutions, and the answer is cut off. To avoid this issue, administrators can configure radio button answer types instead of drop-down list answer types when configuring answers with a large number of characters.
- When you select the Share Care Plan hyperlink to send the report to external parties and you select the sections of your preference for a template, the Share Care Plan PDF ignores the sections you selected, and generates data for all the sections of the template that are configured to be shown by your organization.
- When you attempt to view Custom Client Data in the Share Care Plan, the displayed data is not based on the selected date filters.
- When you select to view the Sections field for a Share Care Plan template and you then navigate back to the Template Name field to select another template, not all of this template’s sections are automatically selected by default. To avoid this, you must review the Sections dropdown for the selected template, to ensure the required sections are selected before you download the Share Care Plan PDF.
- When you select to download Notes or Touchpoints in the Share Care Plan PDF, the Created field incorrectly displays the date the note or touchpoint record was saved instead of displaying the date captured in the Creation Date or Contact Date field. This issue only affects notes and touchpoints where the creation date or contact date were updated by the user when creating the note or touchpoint.
- When you select to edit a Share Care Plan template in the tenant administration workspace that does not have Notes and Touchpoints displayed as sections in the list page, and you select to include them in 23.01, the Share Care Plan template does not update, and as a result, these sections are not displayed in the list page. To avoid this, you can create a copy of the template and then edit it to include the Notes and Touchpoints sections.

Ongoing known issues:

- When you use the Provider APIs to load the provider registry data, any HTML hyperlink tags, for example, `<a href>`, or HTML tags with the style attribute included, for example, `<p style="color:red;">text</p>`, in the provider description or the provider service description fields cause an error on the API POST. To prevent this error from occurring, do not include the HTML hyperlink tags or HTML tags with the style attribute in provider descriptions or provider service descriptions before loading the provider registry data.
- When you repeat an Assessment or Questionnaire with prefilling configured at the Assessment or Questionnaire level and the question level, and the prefilling criteria at the Assessment or Questionnaire level is set to True and at the question level is set to Use Assessment or Questionnaire configuration or Always prefill, and you click Cancel to dismiss the repeat action, a new "in progress" assessment or questionnaire record is incorrectly created. The incorrect "in progress" record is displayed the next time the Assessments list page is refreshed or when you manually refresh the Assessments list page. To correct the issue, delete the "in progress" assessment or questionnaire record and start the repeat action again.
- If you try to complete certain actions, for example, create a referral or assign a program, and you do not have access to the client, you cannot complete the action and no error message is displayed. If you are sure that you need access to the client, either request emergency access to the client or ask a care team member to add you to the client's care team.
- If you edit a date data attribute for a client data type, and select Current Date Comparison, then Custom Message, and enter an incorrect message ID, the custom message fields are no longer visible. To see the fields, select None, then re-select Current Date Comparison and Custom Message.
- When you configure a client data attribute to not use the default value, the value is still visible to care team members. As a workaround, care team members can delete the default value and enter another value.
- When you configure an information message for a client data type cluster, the message is displayed twice. To avoid this, you can add a description to the data cluster instead of an information message. The description displays to care team members below the cluster title.
- If you delete a data attribute from a client data type and that attribute was used in a duplicate validation, the validation is not automatically deleted. If you encounter this issue, you can manually delete the validation.
- You can deactivate a client from your unassigned clients list. If you do and choose to close their client account, you encounter an error. You can proceed to deactivate the client without closing their account. However, if you do, the client appears as deactivated in Merative ™ Integrated Care, but they still incorrectly retain access to their Connect Individuals account. On deactivation, a client should not be able to access their Connect Individuals account.

- When you select the Share Care Plan link to generate the Share Care Plan PDF for a client, the date validations are not displayed and the PDF does not download for the following scenarios:

  - When you enter the 'To' date before the ‘From’ date.

  - When you do not enter the ‘From’ date and enter only the ‘To’ date or vice versa.

  - When you enter a display date-range greater than six months.

  Additionally, when you deselect the Report Footer section for a default Share Care Plan template, no validation is triggered, and the Share Care Plan PDF does not download.
- In tenant admin, when you edit an answer type for an assessment or questionnaire, the previously configured answer types are not displayed in the answers cluster on the edit modal.
- In tenant administration, if you hide a Non-Configurable data type, and it has an associated Summary card, this card is automatically hidden on the Default Client Summary view on the Care team workspace.

  This card is not automatically hidden on any Role based configurations that a customer has created. You can manually hide these cards on the Role based Configuration page in Tenant Administration
- When you create a note in draft or ready to review status, the first comment is missing from the full set of comments

Notices

Privacy policy

The Merative privacy policy is available at https://www.merative.com/privacy.

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