Merative ™ Integrated Care

Release Notes November 2022

Note

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

Edition

This edition applies to Merative ™ Integrated Care.

Contents

Chapter 1. Merative ™ Integrated Care Release Notes

Welcome to the November 2022 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 November 2022 release, see the show and tell November 2022 videos:

- Show and tell November 2022 with captions
- Show and tell November 2022 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 will 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 added a Clinical and Vital views category, which includes views that allow you to report on a client's clinical and vital data, such as a client's medication or blood pressure records. We also included additional views in the Providers, Inquiries, and Client data categories. In the Client data views category, the additional views allow you to report on additional client information, such as a client's status history or email history. For the full list of views that are available, see the Merative ™ Integrated Care reporting data catalog here.

What's new for administrators

- **Hiding the default Share Care Plan template**

  Merative ™ Integrated Care

  To allow your organization to control whether care team users can generate or share care plans, we introduced the ability to hide the default Share Care Plan template.

  If the tenant administrator configures all Share Care Plan templates to be hidden, then the Share Care Plan link is not displayed on the client's summary page.

  If the tenant administrator configures one or more Share Care Plan templates to be shown, then the Share Care Plan link is displayed on the client's summary page to care team members to access.

- **Adding and viewing services and service categories**

  Merative ™ Integrated Care

  To allow you to configure large lists of services, we enhanced configuration options for services and service categories. You can now add more than 1,000 services and service categories to the service library, either manually, through the user interface, or through APIs.

  We introduced pagination for services and service categories lists, so that when the list of services or service categories exceeds 50, pagination control is displayed.

We also added column sorting to the Name, Unit Type, and External System Reference columns for the services list, and filtering ability based on the service name and the external source reference. For the service categories list, we added column sorting to the Name and External System Reference columns.

What's new for care team members

- **Displaying rich text in the provider and provider services description on the Community Resource page**

  Merative ™ Integrated Care

  To allow care team members to quickly see important information when viewing provider and provider service information, we enabled formatting using HTML tags to format the provider and provider service description.

  As a tenant administrator, when you add new or update existing providers, provider services, or provider service groups, you can now use HTML tags when editing the provider or provider service description, so that the text displays in the format of your choice.

  You can also include HTML tags in the provider and provider service description fields that are sent to Merative ™ Integrated Care through the provider APIs.

- **Improving search performance on the Community Resources page**

  Merative ™ Integrated Care

  To improve the search performance, we reduced the maximum number of search results returned on the Community Resources page to 150. If your search returns more than 150 records, an error message that requests you to refine your search criteria is displayed.

Known issues

Merative ™ Integrated Care

- 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 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.
- In tenant administration, if a non-configurable data type is hidden, 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 will not be 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.

- In tenant administration, when you edit an answer type for an assessment or a questionnaire, the previously configured answer types are not displayed in the answers cluster on the edit modal.

Notices

Permissions for the use of these publications are granted subject to the following terms and conditions.

Applicability

These terms and conditions are in addition to any terms of use for the Merative website.

Personal use

You may reproduce these publications for your personal, noncommercial use provided that all proprietary notices are preserved. You may not distribute, display or make derivative work of these publications, or any portion thereof, without the express consent of Merative

Commercial use

You may reproduce, distribute and display these publications solely within your enterprise provided that all proprietary notices are preserved. You may not make derivative works of these publications, or reproduce, distribute or display these publications or any portion thereof outside your enterprise, without the express consent of Merative.

Rights

Except as expressly granted in this permission, no other permissions, licenses or rights are granted, either express or implied, to the publications or any information, data, software or other intellectual property contained therein.

Merative reserves the right to withdraw the permissions granted herein whenever, in its discretion, the use of the publications is detrimental to its interest or, as determined by Merative, the above instructions are not being properly followed.

You may not download, export or re-export this information except in full compliance with all applicable laws and regulations, including all United States export laws and regulations.

MERATIVE MAKES NO GUARANTEE ABOUT THE CONTENT OF THESE PUBLICATIONS. THE PUBLICATIONS ARE PROVIDED "AS-IS" AND WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESSED OR IMPLIED, INCLUDING BUT NOT LIMITED TO IMPLIED WARRANTIES OF MERCHANTABILITY, NON-INFRINGEMENT, AND FITNESS FOR A PARTICULAR PURPOSE.

Merative or its licensors may have patents or pending patent applications covering subject matter described in this document. The furnishing of this documentation does not grant you any license to these patents.

Privacy policy

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

Trademarks