

## Working with the RCKMS Application

# 1 Working with the RCKMS Application

You can work with the RCKMS application by performing the following tasks:

- Signing-in to the RCKMS application
- Searching for Reporting Specifications
- Viewing, Editing and Adding Reporting Specifications
  - Editing and Adding Criteria and Logic Set Information
  - Editing and Adding Specification Information
  - Editing and Adding Internal Reference Information
  - Editing and Adding External Reference Information
- Saving Changes to the Reporting Specification
- Deploying the Reporting Specification
- Running Test Cases and Viewing Results
- Editing and Adding Test Cases
- Generating Queries and Report Output

## 1.1 Signing-in to the RCKMS Application

You sign-in to the application with the user name and password provided to you by the RCKMS Administrator. The Sign-in page for training is <https://demo-rckms.hln.com/bootstrap/>. To sign-in to the RCKMS application, enter your user name and password and click **Sign-in**. The *Home* page displays.

## 1.2 Searching for Reporting Specifications

You can search and display reporting specifications for the available conditions.

Perform the following steps:

1. Do one of the following:
  - Click **Reporting Specifications** in the left navigation menu on the *Home* page. The *Reporting Specification* page displays all conditions identified as reportable by your jurisdiction.
  - Click **Main Menu** in the menu bar at the top of the page and choose **Reporting Specifications**. The *Reporting Specification* page displays all conditions identified as reportable by your jurisdiction.
2. Click **Search** and type the text you want. The search results display in the table. You can also clear any existing text in the *Search* text box to reset the search results and run your search again.

## 1.3 Viewing, Editing and Adding Reporting Specifications

You can view and edit an existing reporting specification or add a new one.

Perform the following steps:

## Working with the RCKMS Application

1. Do one of the following:
  - Click the **Edit**  icon for the condition you want on the *Reporting Specification* page. RCKMS displays the *Edit Reporting Specification* page and the contents of the *Details* tab.
  - Click the **Add Reporting Specification** button on the *Reporting Specification* page. RCKMS displays the *New Reporting Specification* page and the contents of the *Details* tab. Note that this process may take some time to complete.
2. Click **Name** and choose the condition you want.
3. Click **Category** and choose the category you want.
4. Click **NNC Code** and type code you want.
5. Click **Description** and type the description you want.
6. Click **Assigned To** and choose the user you want.
7. Do one or more of the following, depending on your jurisdiction's reporting requirements:
  - Click **Care is provided in this jurisdiction** to receive reports for events where care is provided in your jurisdiction.
  - Click **Lab is located in this jurisdiction** to receive reports for events where laboratory testing is performed in your jurisdiction.
  - Click **Patient is a resident of this jurisdiction** to receive reports for events where the patient resides in your jurisdiction.
8. Click **Status** and choose the option you want.
9. Click **Start Date** and type or choose the date you want.
10. Click **End Date** and type or choose the date you want.
11. Click **Laboratory Required to Submit a Specimen** to indicate the laboratory is required to submit specimen information.
12. Do one of the following:
  - Click the tab you want to continue entering reporting specification information.
    - i. Click **Criteria/Logic Sets** to edit and add logic set and criteria information.
    - ii. Click **Specifications** to edit and add Reporting Timeframe and decision logic information.
    - iii. Click **Internal References** to edit and add internal links and reference information.
    - iv. Click **External References** to edit and add external links and reference information.
    - v. Click **Details** to edit and add reporting specification detail information.
  - Do one of the following
    - i. Click **Apply**. RCKMS saves your changes and displays the current page.
    - ii. Click **Save Reporting Specification**. RCKMS displays the *Reporting Specification* page and the date and time of the last update.

### 1.4 Editing and Adding Criteria and Logic Set Information

You can edit and add the default reporting specification's reporting criteria and logic set information using the *Criteria/Logic Sets* tab options.

## Working with the RCKMS Application

### 1.4.1 Editing and Adding Logic Set Information

You can edit and add the logic set information using the *Logic Sets* options on the *Criteria/Logic Sets* tab.

Perform the following steps:

1. Click the **Criteria/Logic Sets** tab. RCKMS displays the contents of the *Criteria/Logic Set* tab.
2. Do one of the following:
  - To edit a logic set, click the **Edit**  icon for the logic set you want in the *Logic Sets* section. RCKMS displays the *Edit Logic Set* window.
  - To add a logic set, click the **New Logic Set** button in the *Logic Sets* section. RCKMS displays the *New Logic Set* window.
2. Click **Logic Set Name** and type the name you want.
3. Click **Reporter Type** and choose the reporter type you want.
4. Click **Description** and type the description you want.
3. Click the **Save Logic Sets** button. RCKMS saves the logic set information and displays the Logic Sets section of the *Criteria/Logic Set* tab.

### 1.4.2 Editing and Adding Criteria Information

You can edit and add reporting criteria information using the *Criteria* options on the *Criteria/Logic Sets* tab.

Perform the following steps:

1. In the **Criteria/Logic Sets** tab, press the **Page Down** key or scroll down to display the *Criteria* section.
2. Do one of the following:
  - To edit a criterion, click the **Edit**  icon for the criterion you want in the *Criteria* section. RCKMS displays the *Edit Criteria* window.
  - To add a criterion, click the **New Criteria** button in the *Criteria* section. RCKMS displays the *New Criteria* window.
5. Optionally, click **Inactivate** to inactivate the criteria.
6. Click **Criteria Template** and click the option you want. RCKMS displays the options at the bottom of the window. The *Criteria Template* options are **read-only** when signed-in as a *Jurisdiction Administrator* or when *editing* existing criteria.
7. Click **Criteria Label** and type the label you want. On selection of the *Criteria Template* option RCKMS displays sample text in the *Criteria Label* field. The *Criteria Label* options are **read-only** when signed-in as a *Jurisdiction Administrator*.
8. Add or edit the *Criteria Input* information you want. To add or edit *Criteria Input* information, click the drop-down for the criteria input (also known as “criteria predicates”) you want and choose the option you want. You can also type the name you want in the text box to display and choose the input information. The *Criteria Input* options are **read-only** when signed-in as a *Jurisdiction Administrator*.

## Working with the RCKMS Application

9. Click the **Save Criteria** button. RCKMS saves the criteria information and displays the *Criteria* section of the *Criteria/Logic Set* tab.

### 1.5 Editing and Adding Specification Information

You can edit and add reporting timeframe information and indicate if the criteria for a logic set is Sufficient, Necessary or Optional using the *Specification* tab options.

Perform the following steps:

1. Click the **Specifications** tab in the *Reporting Specification* page. RCKMS displays the contents of the *Specifications* tab.
2. Enter *Reporting Timeframe* information. To enter reporting timeframe information, perform the following steps:
  - a. Click the *number* text box and type or choose the number you want for the logic set you want.
  - b. Click the *unit* text box and choose the option you want.
3. Enter the *decision logic/reporting rules* option for the criterion and logic set you want. To enter decision logic/reporting rules options, click the drop-down corresponding to the criterion and logic set you want and choose the option you want. You can choose *Sufficient*, *Necessary* or *Optional*.

### 1.6 Editing and Adding Internal Reference Information

You can edit and add internal links and references to be used by the PHA (not sent to the Reporter) using the *Internal References* tab options.

Perform the following steps:

1. Click the **Internal References** tab. RCKMS displays the contents of the *Internal References* tab.
2. Do the one of following:
  - a. To edit existing internal reference information, click the **Edit**  icon for the item you want. RCKMS displays the **Edit Reference** window.
  - b. To add new internal reference information, click **Add Internal Reference** button. RCKMS displays the **New Reference** window.
3. Click **Name** and type the name you want.
4. Click **URL** and type the URL you want.
5. Click **URL Priority** and choose the option you want.
6. Click **URL Category** and choose the option you want.
7. Click **Description** and type the description you want.
8. Click **Excerpt** and type the excerpt you want.
9. Click the **Save Condition Reference** button. RCKMS saves your changes and displays the *Internal References* tab.

## Working with the RCKMS Application

### 1.7 Editing and Adding External Reference Information

You can edit and add external links and references to be sent to the reporter using the *External References* tab options.

Perform the following steps:

1. Click the **External References** tab. RCKMS displays the contents of the *External References* tab.
2. Do the one of following:
  - a. To edit existing external reference information, click the **Edit**  icon for the item you want. RCKMS displays the **Edit Reference** window.
  - b. To add new internal reference information, click **Add External Reference** button. RCKMS displays the **New Reference** window.
3. Click **Name** and type the name you want.
4. Click **URL** and type the URL you want.
5. Click **URL Priority** and choose the option you want. Note that the *URL Priority* option orders the display of reference information on the Reportability Response, first by priority and then by category.
6. Click **URL Category** and choose the option you want. Note that the *URL Category* option orders the display of reference information on the Reportability Response, first by priority and then by category.
7. Click **Description** and type the description you want.
8. Click **Excerpt** and type the excerpt you want.
9. Click the **Save Condition Reference** button. RCKMS saves your changes and displays the *External References* tab.

### 1.8 Saving Changes to the Reporting Specification

When you are finished entering reporting specification information in the various tabs, click the **Save Reporting Specification** button. RCKMS displays the *Reporting Specification* page and the date and time of the last update.

To facilitate your workflow, RCKMS saves your changes within the working session. However, to save the information permanently and update the database, you must save the entirety of the reporting specification elements. Note that RCKMS displays unsaved information in red text indicating that you must save the reporting specification in order to preserve your changes.

### 1.9 Deploying the Reporting Specification

Once you finalize and save your work on the Reporting Specification, you must deploy it to the Decision Support Service rules engine in order for RCKMS to run the reporting specifications and respond on receipt of a record if it is reportable.

## Working with the RCKMS Application

Perform the following steps:

1. Do one of the following:
  - Click **Reporting Specification** in the left navigation menu on the *Home* page. The *Reporting Specification* page displays.
  - Click **Main Menu** in the menu bar at the top of the page and choose **Reporting Specification**. The *Reporting Specification* page displays.
2. Click the **Edit**  icon for the condition you want on the *Reporting Specification* page. RCKMS displays the *Edit Reporting Specification* page and the contents of the *Details* tab.
3. Review all tabs for completeness and accuracy.
  - Click the tab you want to continue entering reporting specification information.
    - i. Click **Criteria/Logic Sets** to work with logic set and criteria information.
    - ii. Click **Specifications** to work Reporting Timeframe and decision logic information.
    - iii. Click **Internal References** to work with internal links and reference information.
    - iv. Click **External References** to work with external links and reference information.
    - v. Click **Details** to work with reporting specification detail information.
4. Click **Status** in the *Details* tab and choose **Published**.
5. Click **Save Reporting Specification**. RCKMS displays the *Reporting Specification* page and the date and time of the last update.
6. Click the **Deploy Reporting Specifications** button. RCKMS confirms the deployment.

## 2 Running Test Cases and Viewing Results

You can run a test case and view its results using the *Test Case* page.

Perform the following steps:

1. Do one of the following:
  - Click **Test Cases** in the left navigation menu on the *Home* page. RCKMS displays the *Test Cases* tab.
  - Click **Main Menu** in the menu bar at the top of the page and choose **Test Cases**. RCKMS displays the *Test Cases* tab.
2. Click the **Reporting Specification** drop-down and choose the condition you want. RCKMS displays a list of the available test cases.
3. Do one of the following:
  - Click the **Run Test**  icon for the test case you want. RCKMS runs the test case and displays the *Test Results* window, with the summary results at the top of the page.
  - Click the **Edit**  icon for the test case you want. RCKMS displays the *Edit Test Case* page and the contents of the *Details* tab. Then, click the **Run Test** button. RCKMS runs the test case and displays the *Test Results* window, with the summary results at the top of the page.

## Working with the RCKMS Application

4. Optionally, click the links for the test result detail information you want. These include *Jurisdiction Information, Test Subject, Test Inputs, Logs and Messages, Links and References, Input XML* and *Output XML*.
5. When you are finished, click the **Close** button. RCKMS displays the *Test Cases* page.

### 2.1.1 Editing and Adding Test Cases

Perform the following steps:

1. Add or edit test case *Details* information.
  - a. Do one of the following:
    - i. Click the **Edit**  icon for the test case you want. RCKMS displays the *Edit Test Case* page and the contents of the *Details* tab.
    - ii. Click the **New Test Case** button. RCKMS displays the *New Test Case* page and the contents of the *Details* tab.
  - b. Click **Reporting Specifications** and choose the condition you want.
  - c. Click **Name** and type the name you want.
  - d. Click **Description** and type the description you want.
  - e. Click **Reporter Type** and choose the reporter type you want.
  - f. Optionally, click **Condition Expected to be Reportable** to indicate that the condition is expected to be reportable.
  - g. Optionally, click **Skip this test** to skip the test case execution.
2. Add or edit *Test Subject* information.
  - a. Click the **Test Subject** tab. RCKMS displays the contents of the *Test Subject* tab.
  - b. Click **Gender** and choose the gender you want.
  - c. Do one of the following:
    - i. Click the **Offset-Based** radio button to indicate the age offset information. RCKMS displays the *Age Offset* field. Then, type the offset you want in years, months or days.
    - ii. Do one of the following:
      - a. Click the **Date-Based** radio button to enter birthdate or execution date information. You can click **Date of Birth** and type or choose the date you want.
      - b. Click **Execution Date** and type or choose the date you want. The *Age at Execution* option is read-only and updates based on your entry.
3. Add or edit *Test Inputs* information.
  - a. Click the **Test Inputs** tab. RCKMS displays the contents of the *Test Inputs* tab.
  - b. Do one of the following:
    - i. Click the **Criteria** radio button to specify the input source for the test case as criteria-based. RCKMS displays the criteria options in the *Test Case Inputs* section.
    - ii. Click the **File** radio button to specify the input source for the test as file-based. RCKMS displays *Payload Type* options.

## Working with the RCKMS Application

4. To work with *criteria-based* test case input, do the following:
  - a. Click the **Criteria** radio button to specify the input source for the test case as criteria-based. RCKMS displays the criteria options in the *Test Case Inputs* section. **Note. To work with file-based test case input, go to step 5 in these procedures.**
  - b. Do one of the following:
    - i. To edit criteria-based test case input, click the **Edit**  icon for the criterion you want in the *Test Case Inputs* section. RCKMS displays the *Edit Criteria* window.
    - ii. To add a new criterion, click the **New Test Case Input** button in the *Test Case Inputs* section. RCKMS displays the *New Test Case Input* window.
  - c. Click **Criteria Template** and choose the option you want. RCKMS displays the Criteria Input options at the bottom of the window. Note that the Criteria Template options are read-only when editing existing criteria.
  - d. Click **Criteria Label** and type the label you want. Note that on selection of the *Criteria Template* option RCKMS displays sample text in the *Criteria Label* field.
  - e. Add or edit the *Criteria Input* information you want.
    - i. To add or edit *Criteria Input* information, click the drop-down for the criteria input (also known as “criteria predicates”) you want and choose the option you want.
    - ii. You can also type the name you want in the text box to display and choose the input information.
  - f. Click the **Save Test Case Input** button. RCKMS saves the criteria information and displays the *Test Case Inputs* section of the *Test Inputs* tab.
5. To work with *file-based* test case input, do the following:
  - a. Click the **File** radio button to specify the input source for the test as file-based. RCKMS displays *Payload Type* options. **Note. To work with criteria-based test case input, go to step 4 in these procedures.**
  - b. Do one of the following:
    - i. Click **eICR** to work with eICR file-based input. RCKMS displays the *Browse* button.
    - ii. Click **vMR** to work with vMR file-based input. RCKMS displays the *Browse* button.
  - c. Click the **Browse** button and choose the file you want to upload from your computer.
6. Optionally, add or edit *Expected Criteria* information.
  - a. Do one of the following:
    - iii. To edit expected criteria, click the **Edit**  icon for the criterion you want in the *Expected Criteria* section. RCKMS displays the *Edit Expected Criteria* window.
    - iv. To add a new expected criterion, click the **New Expected Criteria** button in the *Expected Criteria* section. RCKMS displays the *New Expected Criteria* window.
  - b. Click *Criteria Template* and choose the option you want.

## Working with the RCKMS Application

- c. Click **Save Expected Criteria**. RCKMS saves the expected criteria and displays the *Expected Criteria* section on the *Test Inputs* tab.
7. Click the **Save Test Case** button. RCKMS saves the test case and displays the *Test Cases* page.

## 3 Generating Queries and Report Output

You can enter queries and generate report output using the Reports page.

Perform the following steps:

1. Do one of the following:
  - Click **Reports** in the navigation menu on the *Home* page. RCKMS displays the *Reports* page.
  - Click **Main Menu** in the menu bar at the top of the page and choose **Reports**. RCKMS displays the *Reports* page.
2. Click **Reports** and choose the option you want.
3. Click **Jurisdiction Scope** and choose the option you want. Selecting the *Jurisdiction* option displays the **Jurisdiction** drop-down. Click the option for the jurisdiction you want.
4. Click **Status** and choose the option you want.
5. Click **Condition** and choose the option you want.
6. Click the **Run Report** button. RCKMS displays the report output as a PDF document. Depending on your workstation's configuration, you may be prompted to save or open the file.