

Reportable Conditions Knowledge Management System (RCKMS) Jurisdiction Administrator User Guide

Version 1.2
DRAFT
May 08, 2018

Table of Contents

1	Introduction	4
1.1	Navigating the RCKMS Application	5
2	Working with Reporting Specifications.....	10
2.1	Searching for Reporting Specifications	11
2.2	Adding Reporting Specifications	13
2.3	Editing Details Information	14
2.4	Adding and Editing Logic Set Information.....	18
2.5	Adding and Editing Criteria Information	20
2.6	Adding and Editing Specification Information	23
2.7	Adding and Editing Internal Reference Information.....	25
2.8	Adding and Editing External Reference Information	28
2.9	Saving Changes to the Reporting Specification	30
2.10	Deploying the Reporting Specification.....	31
3	Running Test Cases and Viewing Results	36
3.1	Adding and Editing Test Cases	36
4	Generating Queries and Report Output	48
4.1	Reports page	48
5	Viewing and Editing Jurisdiction Information	52
	Glossary.....	56
	Index.....	68

Revision History

Version	Implemented By	Revision Date	Approved By	Approval Date	Reason
1.0	Antonio DaSilva	08/29/2017			Initial draft.
1.1 DRAFT	Kristin Peterson	01/08/2018			Added information regarding condition lifecycle
1.2	Kristin Peterson	01/08/2018			Added Condition List, May be Reportable, Responsible Agency, and Shared Services Submission Tool.

1 Introduction

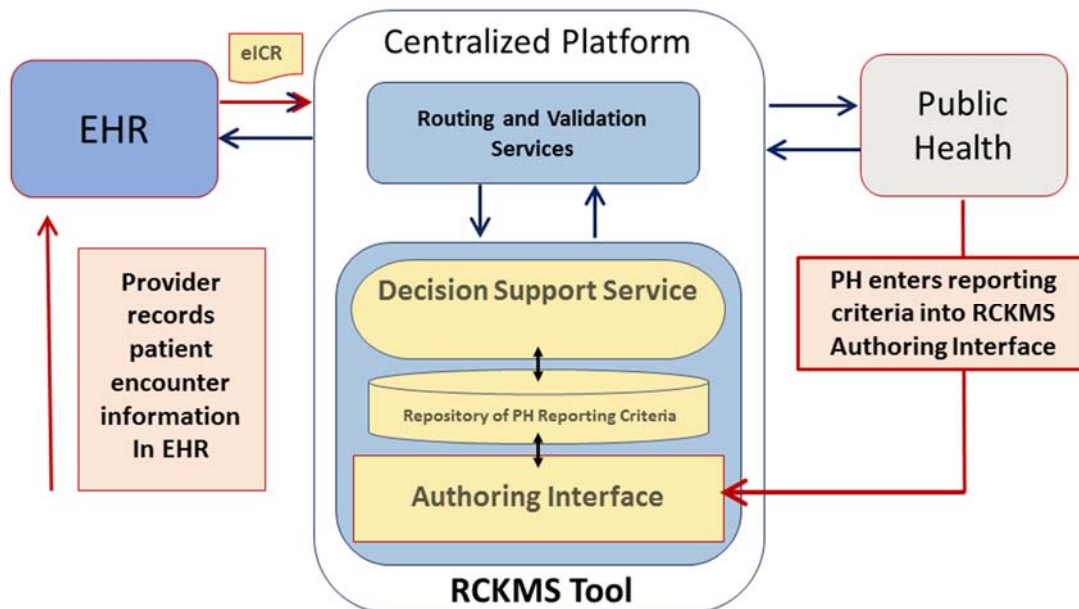
The User Guide documents the procedures for using the Reportable Conditions Knowledge Management System (RCKMS). The intended audience are [Jurisdiction Administrators](#) and other [Public Health Agency](#) (PHA) stakeholders interested in working with the application.

The RCKMS is a tool developed to enhance surveillance by providing comprehensive information to clinicians, labs and reporters about the “who, what, where, when, why and how ” of case reporting with the aim of delivering information from providers on potential cases to state and local public health as a service of the broader infrastructure for [electronic case reporting](#) (ECR).

The RCKMS application has two main parts, the [authoring interface](#) and a [Decision Support Service](#) (DSS). The authoring interface is the portal where information about reporting [criteria](#) gets entered, stored, and processed. To ease the burden of entering the criteria, the authoring interface also comes pre-populated with the [reporting specifications](#) and the PHAs can either use these [defaults](#) or change them to meet their needs.

The second part of the tool is a [Decision Support](#) Service that providers can query to determine if the case should be reported and if so to where. It is linked to a provider's [Electronic Health Record](#) (EHR) system and after the patient visits the provider, the encounter information is recorded in the EHR. If the EHR detects information that suggests a suspected case, the EHR will call RCKMS decision support, which will then provide the [determination of reportability](#).

To use the tool, the user opens the RCKMS web site and after sign-in, selects the condition they want to work with. The application is pre-populated with default [reporting criteria](#) that you can use as-is or can customize as required.



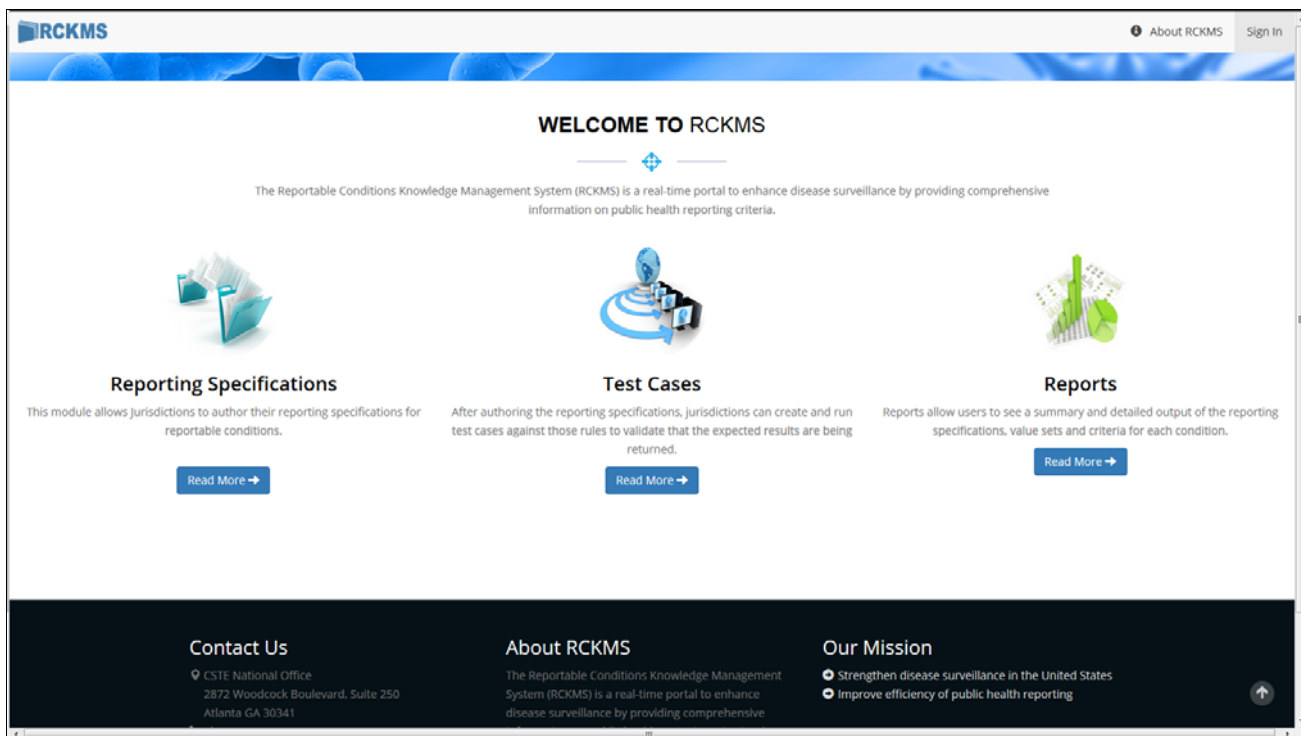
Once the criteria is entered and saved, it is stored in a repository linked to the Decision Support Service. The RCKMS also supports testing and once you enter and save criteria you can run [test cases](#) against them to ensure they are correct.

On the provider end, once the patient visits a provider and their encounter information is recorded, the EHR initiates generation of an [electronic initial case report](#) following detection of information suggesting a suspected case.

That message is sent to the [AIMS](#) platform and queued for decision processing. The AIMS platform calls the RCKMS Decision Support Service, which provides the determination of reportability and returns a [Reportability Response](#).

1.1 Navigating the RCKMS Application

You sign-in to the application with the user name and password provided to you by the [RCKMS administrator](#). The URL for the RCKMS training and demonstration instance is <https://demo-rckms.hln.com/bootstrap-training/> and displays the *Welcome to RCKMS* page.



The *Welcome* page displays links to pages providing additional information about the RCKMS application and to the *Sign In* page, where you sign-in to your account to work with the RCKMS application. The bottom of the page include CSTE contact information and a link to the [Feedback Form](#) you can use to send comments to the RCKMS team, report an issue, or request further assistance (<https://cste.wufoo.com/forms/k1p62bia1nlpinx/>).

To sign-in to the RCKMS application, click the **Sign In** link at the top right of the *Welcome to RCKMS* page. RCKMS displays the *Sign In* page.

Sign In

Sign in to your account

Username

Password

Sign In

Contact Us
1600 Clifton Road Atlanta, GA 30329
800.CDC.INFO
TTY: 888-232-6348
rckms@cdc.gov

About RCKMS
The Reportable Conditions Knowledge Management System (RCKMS) is a real-time portal to enhance disease surveillance by providing comprehensive information on public health reporting criteria. The tool provides public health reporters about the steps

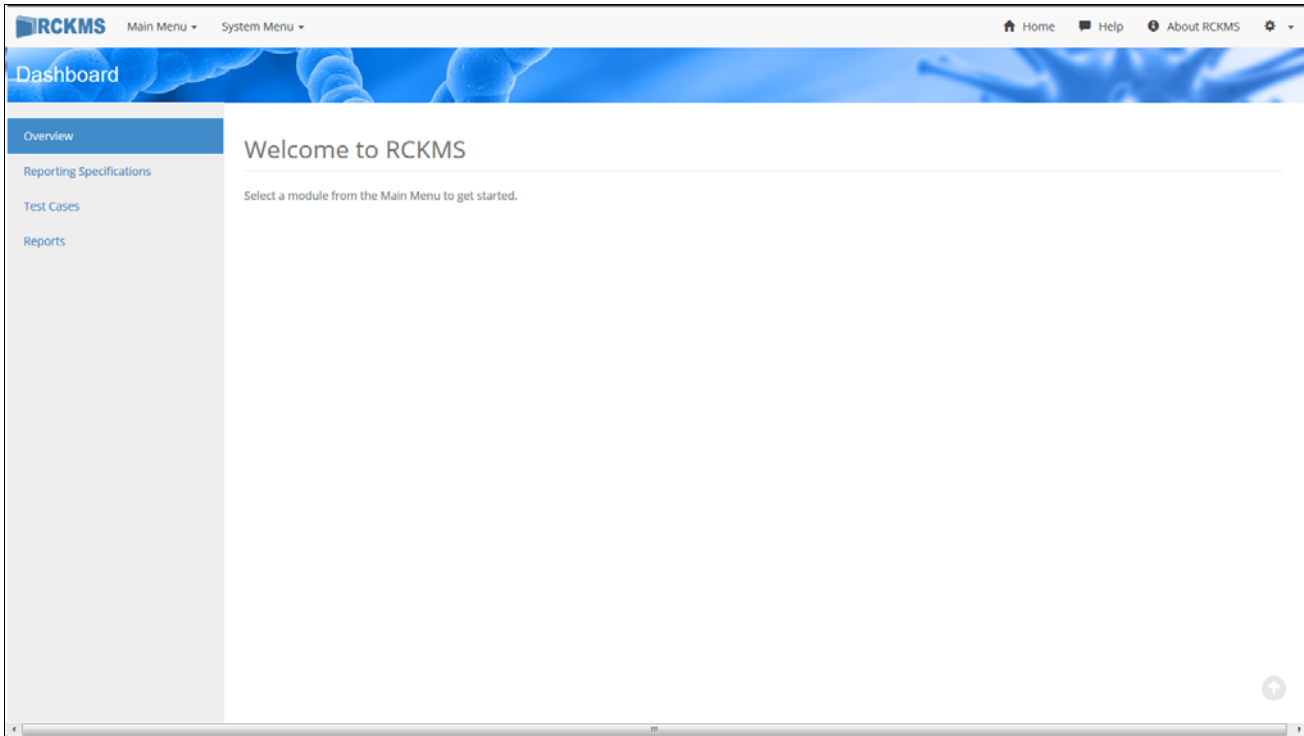
Our Mission
• Strengthen disease surveillance in the United States
• Improve efficiency of public health reporting

Enter your user name and password and click **Sign-in**. The [Home page](#) displays.

1.1.1 Home page

The *Home* page serves as the landing page for the application following successful [sign-in](#).

You access the Jurisdiction Administrator functionality by selecting the link you want in the side navigation menu. You can also access additional functionality by means of the options on the menu bar.



The following table displays the options on the page.

Item	Description														
Menu bar	Displays options for accessing the RCKMS modules.														
	<table border="1"> <thead> <tr> <th>Item</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Main Menu</td> <td>Click to display the options for Jurisdiction Administrator tasks.</td> </tr> <tr> <td>System Menu</td> <td>Click to display the options for RCKMS Administrator tasks. Note. This option displays only for RCKMS Administrators and is not available for Jurisdiction Administrators.</td> </tr> <tr> <td> Home</td> <td>Click to display the Home page.</td> </tr> <tr> <td> Help</td> <td>Click to display help.</td> </tr> <tr> <td> About RCKMS</td> <td>Click to display the <i>About</i> page and general information on the RCKMS application.</td> </tr> <tr> <td> Account</td> <td>Click to display information about the current session and to sign-out of the application.</td> </tr> </tbody> </table>	Item	Description	Main Menu	Click to display the options for Jurisdiction Administrator tasks.	System Menu	Click to display the options for RCKMS Administrator tasks. Note. This option displays only for RCKMS Administrators and is not available for Jurisdiction Administrators.	Home	Click to display the Home page.	Help	Click to display help.	About RCKMS	Click to display the <i>About</i> page and general information on the RCKMS application.	Account	Click to display information about the current session and to sign-out of the application.
	Item	Description													
	Main Menu	Click to display the options for Jurisdiction Administrator tasks.													
	System Menu	Click to display the options for RCKMS Administrator tasks. Note. This option displays only for RCKMS Administrators and is not available for Jurisdiction Administrators.													
	Home	Click to display the Home page.													
	Help	Click to display help.													
	About RCKMS	Click to display the <i>About</i> page and general information on the RCKMS application.													
Account	Click to display information about the current session and to sign-out of the application.														

Item	Description
Overview	Header for side navigation menu options.
Reporting Specifications	Click to display the Reporting Specification page.
Test Cases	Click to display the Test Cases page .
Reports	Click to display the Reports page .

Note that the side navigation link *Reporting Specification*, *Tests Cases* and *Reports* display only on the home page. You can access these options using the *Main Menu* on the menu bar at the top of window.

Blank Page

2 Working with Reporting Specifications

By default, RCKMS displays all conditions identified as reportable by your PHA. You can manage the set of reporting specifications for the conditions supported in your [jurisdiction](#) using the *Reporting Specifications* module.

You can perform the following tasks:

- Search and display reporting specifications for the available conditions. To search for a reporting specification, refer to [Section 2.1, *Searching for Reporting Specifications*](#).
- Add and edit reporting specifications.
 - Work with condition detail information by viewing and editing basic information about the reporting specification using the [Details tab](#). To work with reporting specification details, refer to [Section 2.3, *Editing Details Information*](#).
 - Work with reporting criteria and logic set information by adding and editing the reporting specification's reporting criteria and [logic sets](#) using the [Criteria/Logic Sets tab](#). To work with criteria and logic set information, refer to [Section 2.4, *Adding and Editing Logic Set Information*](#) and [Section 2.5, *Adding and Editing Criteria Information*](#).
 - Work with the specification by adding reporting timeframe information and indicating if the criteria for a logic set is [Sufficient](#), [Necessary](#) or [Optional](#) using the Specification tab. To work with reporting timeframe and [rules logic](#) information, refer to [Section 2.6, *Adding and Editing Specification Information*](#).
 - Work with [internal links and reference information](#) by adding and editing supporting text, links to web sites and other documents using the [Internal References tab](#) option. To work with internal reference information, refer to [Section 2.7, *Adding and Editing Internal Reference Information*](#).
 - Work with [external reference](#) information by adding and editing supporting text, links to web sites and other documents using the [External References tab](#) option. To work with external reference information, refer to [Section 2.8, *Adding and Editing External Reference Information*](#).
- Delete an existing reporting specification. To delete a reporting specification, refer to [Section 2.3.1, *Deleting Reporting Specifications*](#).
- Save changes to reporting specifications. To save a reporting specification, refer to [Section 2.9, *Saving Changes to the Reporting Specification*](#).
- [Deploy](#) reporting specifications. To deploy a reporting specification, refer to [Section 2.10, *Deploying the Reporting Specification*](#).

2.1 Searching for Reporting Specifications

You can search and display reporting specifications for the available conditions. By default, the [Reporting Specification page](#) displays all conditions identified as reportable by your PHA.

You can use the *Search* text box in the *Reporting Specification* page to search for the condition you want. If the reporting specification you want is not available, you can add a reporting specification for the condition you want.

To add a reporting specification refer to [Section 2.2, Adding Reporting Specifications](#).

Perform the following steps:

- 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 PHA.
 - 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 PHA.
- 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.

From here you can add a new reporting specification, edit an existing reporting specification, or delete the specification you want.

To add a new reporting specification, refer to [Section 2.2, Adding Reporting Specifications](#). To edit an existing reporting specification, refer to [Section 2.3, Editing Details Information](#). To delete a reporting specification, refer to [Section 2.3.1, Deleting Reporting Specifications](#).

2.1.1 Reporting Specification page

The *Reporting Specification* page displays all conditions identified as reportable by your PHA by default.

The screenshot displays the RCKMS Reporting Specification page. At the top, there is a navigation bar with 'RCKMS Main Menu' and links for 'Home', 'Help', and 'About RCKMS'. The page title is 'Reporting Specification'. Below the title, there is a search box and a 'Show 10 entries' dropdown. The main content is a table with the following data:

Nationally Notifiable?	Specification Name	Category	Status	Assigned To	Created By	Last Updated
Y	Chlamydia	Sexually Transmitted Infections	In Progress		daryl	01/04/2018 12:49 PM
Y	Gonorrhea	Sexually Transmitted Infections	In Progress		daryl	01/04/2018 12:52 PM
Y	Pertussis	Vaccine Preventable Conditions	In Progress		daryl	01/04/2018 12:54 PM
Y	Salmonellosis	Enteric Diseases	In Progress		daryl	01/04/2018 12:58 PM
Y	Zika	Zoonotic and Vectorborne Diseases	In Progress	janet.hui		01/04/2018 1:00 PM








Below the table, there are two buttons: '+ Add Reporting Specification' and 'Deploy Reporting Specifications'. At the bottom right, there is a pagination control showing 'Previous 1 Next'.

The *Reporting Specification* page also displays the *Search* text box at the top right and the search results in the table beneath. As you enter text in the *Search* box, the table displays items matching your query. Note that the search works for with any of the columns in the table and you can search based on a category or status as well as condition or other item accounted under the available column heading.

The results of the previous search persist on the page so long as the query text remains in the *Search* text box. Clear the *Search* text box to reset the list of default conditions.

Note that only those conditions set up in RCKMS with a reporting specification are available through the *Search* option.

The following table details the options on the page.

Item	Description																				
Show entries	Click drop-down and choose the number of items to display in the grid.																				
Search	Type the text you want and the search results display in the table. Clear existing text to reset the search results.																				
Reportable Conditions table	<p>The Reportable Conditions table includes the following columns.</p> <table border="1"> <thead> <tr> <th>Item</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Nationally Notifiable?</td> <td>Indicates a Nationally Notifiable condition.</td> </tr> <tr> <td>Specification Name</td> <td>The name of the reporting specification.</td> </tr> <tr> <td>Category</td> <td>The disease category organizing the condition options. Options include Bloodborne, Enteric, Vaccine-Preventable Conditions and Zoonotic and Vectorborne Diseases, among others.</td> </tr> <tr> <td>Status</td> <td>The status of the reporting specification for the selected condition. Options include: In Progress, Assigned for Review, Ready for Test, Published to Test, Retired from Test, Ready for Production Use, Published to Production, and Retired from Production.</td> </tr> <tr> <td>Assigned To</td> <td>The administrator to whom the reporting specification for the selected condition is assigned for review.</td> </tr> <tr> <td>Created By</td> <td>The username of the person who initially added the reporting specification for the selected condition.</td> </tr> <tr> <td>Last Updated</td> <td>The last update date indicating the date the item was last saved.</td> </tr> <tr> <td> Edit</td> <td>Click to edit the selected item.</td> </tr> <tr> <td> Delete</td> <td>Click to delete the selected item.</td> </tr> </tbody> </table> <p>Click the  Sort icon at the top of each column to sort the information.</p>	Item	Description	Nationally Notifiable?	Indicates a Nationally Notifiable condition.	Specification Name	The name of the reporting specification.	Category	The disease category organizing the condition options. Options include Bloodborne, Enteric, Vaccine-Preventable Conditions and Zoonotic and Vectorborne Diseases, among others.	Status	The status of the reporting specification for the selected condition. Options include: In Progress, Assigned for Review, Ready for Test, Published to Test, Retired from Test, Ready for Production Use, Published to Production, and Retired from Production.	Assigned To	The administrator to whom the reporting specification for the selected condition is assigned for review.	Created By	The username of the person who initially added the reporting specification for the selected condition.	Last Updated	The last update date indicating the date the item was last saved.	 Edit	Click to edit the selected item.	 Delete	Click to delete the selected item.
Item	Description																				
Nationally Notifiable?	Indicates a Nationally Notifiable condition.																				
Specification Name	The name of the reporting specification.																				
Category	The disease category organizing the condition options. Options include Bloodborne, Enteric, Vaccine-Preventable Conditions and Zoonotic and Vectorborne Diseases, among others.																				
Status	The status of the reporting specification for the selected condition. Options include: In Progress, Assigned for Review, Ready for Test, Published to Test, Retired from Test, Ready for Production Use, Published to Production, and Retired from Production.																				
Assigned To	The administrator to whom the reporting specification for the selected condition is assigned for review.																				
Created By	The username of the person who initially added the reporting specification for the selected condition.																				
Last Updated	The last update date indicating the date the item was last saved.																				
 Edit	Click to edit the selected item.																				
 Delete	Click to delete the selected item.																				
Add Reporting Specification	Click to display the Details tab on the <i>New Reporting Specification</i> page and add a reporting specification.																				

Item	Description
Deploy Reporting Specification	Click to deploy the reporting specification and make it “live” and available to engage provider data and decision support logic for delivery of Reportability Responses. You can deploy to Test or Production.
Previous	Click to navigate back through the list of items available.
Next	Click to navigate forward through the list of items available.

2.2 Adding Reporting Specifications

You can add a new reporting specification to your existing set of reporting specifications.

You use the **Add Reporting Specification** button under the table of search results in the [Reporting Specification page](#) to add a reporting specification for the condition you want.

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.
 - Click **Main Menu** in the menu bar at the top of the page and choose **Reporting Specifications**. The *Reporting Specification* page displays.
2. Click **Add Reporting Specification** button. RCKMS displays the *Import Default Reporting Specification* pane.
3. Click **Select an Option** and choose the reporting specification that you want.
4. Click **Create** and the Edit Reporting Specification page will display.
5. **Name** is populated during the import process.
6. **Condition Code** is populated during the import process.
7. **Category** is populated during the import process.
8. **NNC Code** is populated during the import process and the Nationally Notifiable Event Code displays if applicable.
9. Click **Description** and type the description you want.
10. Do one or more of the following, depending on your PHA’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.
11. Click **Status** and choose the option you want, the default is “In Progress”. *Note:* Newly added reporting specifications have the following Status options: Assigned for Review, In Progress, Ready for Test, and Retired from Test.
12. Click **Start Date** and type the date you want. Note that the *Start Date* must be greater than the date the condition is published.
13. Click **End Date** and type the date you want.


14. Click **Assigned To** and choose the option you want.
15. Click **Laboratory Required to Submit a Specimen** to indicate the laboratory is required to submit specimen information.
16. 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. To work with criteria and logic set information, refer to [Section 2.4, Adding and Editing Logic Set Information](#) and [Section 2.5, Adding and Editing Criteria Information](#).
 - ii. Click **Specifications** to edit and add Reporting Timeframe and decision logic information. To work with reporting timeframe and decision logic information, refer to [Section 2.6, Adding and Editing Specification Information](#).
 - iii. Click **Internal References** to edit and add internal links and reference information. To work with internal reference information, refer to [Section 2.7, Adding and Editing Internal Reference Information](#).
 - iv. Click **External References** to edit and add external links and reference information. To work with external reference information, refer to [Section 2.8, Adding and Editing External Reference Information](#).
 - v. Click **Details** to edit and add reporting specification detail information. To work with reporting specification details, refer to [Section 2.3, Editing Details Information](#).
17. Do one of the following:
 - Click **Apply**. RCKMS saves your changes and keeps the window open.
 - Click **Save Reporting Specification**. RCKMS displays the *Reporting Specification* page and the date and time of the last update.
 - Click **Close** to close the page if you have made no changes.
 - Click **Cancel** to cancel the operation and display the previous page.

Once you have entered the information in the *Details tab*, you can work through the remaining tabs on the *Reporting Specification* page and enter criteria and logic set information, as well as any internal and external references you want.

2.3 Editing Details Information

You can edit basic information about the reporting specification for the selected condition, such as name and status information, using the [Details tab](#) options on the [Reporting Specification page](#).

Perform the following steps:

1. Do one of the following:
 - Click **Reporting Specifications** in the left navigation menu on the *Home* page. The *Reporting Specifications* page displays.
 - Click **Main Menu** in the menu bar at the top of the page and choose **Reporting Specifications**. The *Reporting Specification* page displays.
2. Click the **Edit**  icon for the item you want in the table. The *Reporting Specification* page displays the contents of the *Details* tab.


3. **Name** was populated during the import process and is not editable.
4. **Condition Code** was populated during the import process and is not editable.
5. **Category** was populated during the import process and is not editable.
6. **NNC Code** was populated during the import process and is not editable. Note: if the condition is not nationally notifiable, the field will be blank.
7. Click **Description** and type the description you want.
8. Do one or more of the following, depending on your PHA'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.
9. Click **Status** and choose the option you want. The status options are dependent upon the state of the reporting specification workflow. Note: for more on statuses, please refer to section 2.10.
 - a. For new reporting specifications, the following statuses are available: Assigned for Review, In Progress, Ready for Test, and Retired from Test.
 - b. For reporting specifications with the status of "Published to Test", the options are: Published to Test, Ready for Production Use and Retired from Test.
 - c. For reporting specifications with the status of "Published to Production", the options are: Published to Production and Retired from Production.
10. Click **Start Date** and type the date you want. Note that the *Start Date* must be greater than the date the condition is published.
11. Click **End Date** and type the date you want.
12. Click **Assigned To** and choose the option you want.
13. Click **Laboratory Required to Submit a Specimen** to indicate the laboratory is required to submit specimen information.
14. 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. To work with criteria and logic set information, refer to [Section 2.4, Adding and Editing Logic Set Information](#) and [Section 2.5, Adding and Editing Criteria Information](#).
 - ii. Click **Specifications** to edit and add Reporting Timeframe and decision logic information. To work with reporting timeframe and decision logic information, refer to [Section 2.6, Adding and Editing Specification Information](#).
 - iii. Click **Internal References** to edit and add internal links and reference information. To work with internal reference information, refer to [Section 2.7, Adding and Editing Internal Reference Information](#).
 - iv. Click **External References** to edit and add external links and reference information. To work with external reference information, refer to [Section 2.8, Adding and Editing External Reference Information](#).

- v. Click **Details** to edit and add reporting specification detail information. To work with reporting specification details, refer to [Section 2.3, *Editing Details Information*](#).


15. Do one of the following:

- Click **Apply**. RCKMS saves your changes and keeps the window open.
- Click **Save Reporting Specification**. RCKMS displays the *Reporting Specification* page and the date and time of the last update.
- Click **Close** to close the page if you have made no changes.
- Click **Cancel** to cancel the operation and display the previous page.

2.3.1 Deleting Reporting Specifications

You can delete an existing reporting specification. You click the **Delete**  icon to delete an existing reporting specification.

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.
 - Click **Main Menu** in the menu bar at the top of the page and choose **Reporting Specifications**. The *Reporting Specification* page displays.
2. Click the **Delete**  icon for the item you want. The application deletes the selected item and displays a confirmation message.
3. Click **Yes** when the system displays the question “Are you sure you want to delete the Reporting Specification?”. The application deletes the selected item and displays a confirmation message.



Important. *Once you delete the reporting specification, the item is permanently removed and cannot be restored without re-importing.*

2.3.2 Details tab

The *Details* tab displays basic information about the reporting specification for the selected condition.

The *Details* tab displays status and effective date information, as well as the reporting preference options.

The following table details the options on the page.

Item	Description
Name	The descriptive name of the condition.
Condition Code	The SNOMED code and name pertaining to the condition.
Category	The disease category organizing the condition. Options include Bloodborne, Enteric, Vaccine-Preventable Conditions and Zoonotic and Vectorborne Diseases, among others.
NNC Code	The nationally notifiable event code associated with the condition. This is only applicable if the condition is nationally notifiable.
Description	The description of the reporting specification for the selected condition.
Assigned To	The administrator to whom the reporting specification for the selected condition is assigned for review.
Status	The status of the reporting specification for the selected condition. Options include: In Progress, Assigned for Review, Ready for Test, Published to Test, Retired from Test, Ready for Production Use, Published to Production, and Retired from Production
Start Date	The start date on which the reporting specification for the selected condition is in effect. Click the Calendar  button to display a calendar and choose the date you want.
End Date	The end date on which the reporting specification for the selected condition is in effect. Click the Calendar  button to display a calendar and choose the date you want.
Assigned To	The administrator to whom the reporting specification for the selected condition is assigned for review.
Last Updated	Date of last save.

Item	Description
Created By	User name of reporting specification creator.
Care provided in this jurisdiction?	Click to receive report for events where care is provided in your jurisdiction.
Lab is located in this Jurisdiction?	Click to receive report for events where laboratory testing is performed in your jurisdiction.
Patient resident of this jurisdiction?	Click to receive report for events where the patient resides in your jurisdiction.
Laboratory required to submit a specimen	Click to indicate the laboratory is required to submit a specimen.
Save Reporting Specification	Click to save the reporting specification and display the previous page.
Apply	Click to save your changes and keep the window open.
Close	Click to close and display the previous page.


2.4 Adding and Editing Logic Set Information


You can add and edit the reporting specification's logic set information using the [Criteria/Logic Sets tab](#) options in the *Reporting Specification* page.

Logic sets indicate the type of reporter such as a lab or provider, when the provider is expected to report, and what is required of them for reporting. Used in combination with reporting criteria, logic sets express logical statements in machine-processable language following the [S, N, O notation](#) used in the [position statements](#), where "S" indicates the criteria is Sufficient by itself to qualify the case for reporting, "N" indicates Necessary and "O" is Optional.

For more detail on the S, N, O notation, refer to [Section 2.6, Adding and Editing Specification Information](#). For more detail on reporting criteria, refer to [Section 2.5, Adding and Editing Criteria Information](#).

Perform the following steps:

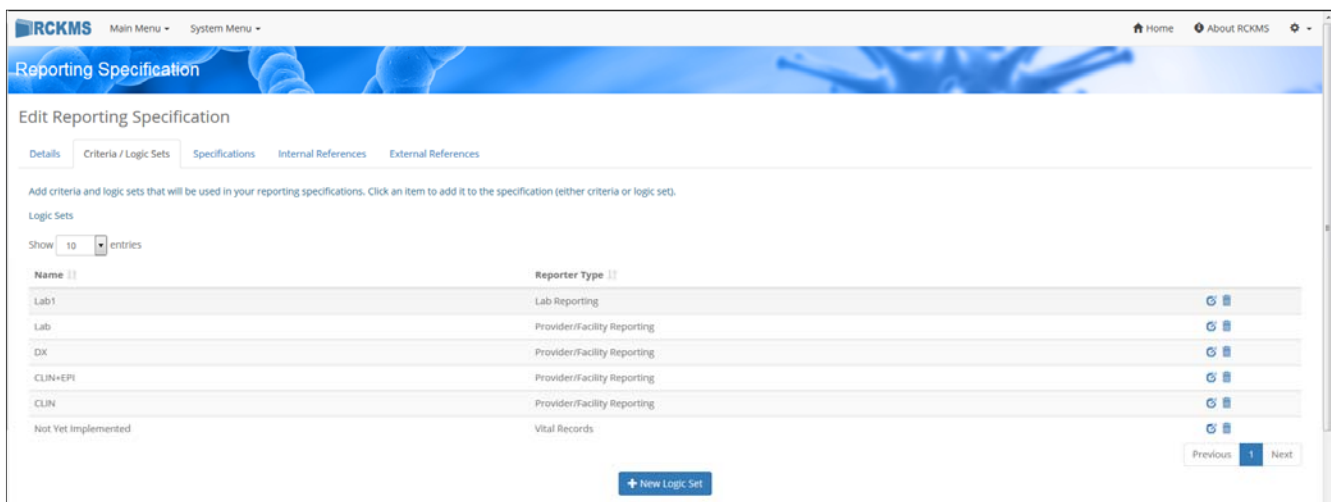
1. Click the **Criteria/Logic Sets** tab in the *Reporting Specification* page. RCKMS displays the contents of the [Criteria/Logic Sets tab](#).
2. Do one of the following:
 - To edit a logic set, click the **Edit**  icon for the logic set you want in the *Logic Sets* section. RCKMS displays the [Edit 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.
3. Click **Logic Set Name** and type the name you want.
4. Click **Reporter Type** and choose the reporter type you want.
5. Click **Description** and type the description you want.
6. Click the **Save Logic Sets** button. RCKMS saves the logic set information and displays the *Logic Sets* section of the [Criteria/Logic Set tab](#).

You can also delete a logic set by clicking the **Delete**  icon for the logic set you want. Note that once you delete a logic set, it cannot be recovered. When you delete a logic set, the logic set and the criteria it organizes no longer display in the [Specifications tab](#).

As you add, edit and delete logic set information on the [Criteria/Logic Sets tab](#), that information is updated in the *Specifications* tab. To work with logic sets and criteria in the [Specifications tab](#), refer to [Section 2.6, Adding and Editing Specification Information](#).

2.4.1 Criteria/Logic Sets tab – Logic Sets section

The *Logic Sets* section in the *Criteria/Logic Sets* tab in the *Reporting Specification* page displays the reporting specification's logic set information.




The screenshot shows the 'Edit Reporting Specification' page in the RCKMS system. The 'Criteria / Logic Sets' tab is active. Below the header, there is a section for 'Logic Sets' with a 'Show 10 entries' dropdown. A table lists logic sets with columns for 'Name' and 'Reporter Type'. Each row has 'Edit' and 'Delete' icons. At the bottom, there is a 'New Logic Set' button and 'Previous' and 'Next' navigation buttons.

Name	Reporter Type	
Lab1	Lab Reporting	
Lab	Provider/Facility Reporting	
DX	Provider/Facility Reporting	
CLIN+EPI	Provider/Facility Reporting	
CLIN	Provider/Facility Reporting	
Not Yet Implemented	Vital Records	

The following table details the options on the page.

Item	Description
Show entries	Click drop-down and choose the number of items to display in the grid.
Name	The logic set name.
Reporter Type	The reporter type associated with the logic set.
Edit	Click to edit the selected item.
Delete	Click to delete the selected item.
Previous	Click to navigate back through the list of items available.
Next	Click to navigate forward through the list of items available.
New Logic Set	Click to add a new logic set and display the New Logic Set window .

Click the  **Sort** icon at the top of each column to sort the information.

2.4.2 Logic Set window

The *Logic Set* window displays the options for [adding and editing logic set information](#). You can add new logic sets or edit existing logic sets.

The following table details the options on the page.

Item	Description
Logic Set Name	The logic set name.
Reporter Type	The reporter type associated with the logic set. Options include Lab Reporting, Provider/Facility Reporting, and Vital Records.
Description	The description of the logic set.
Save Logic Set	Click to save the logic set.
Apply	Click to save your changes and keep the window open.
Cancel/Close	Click to cancel your changes, or close if you have not made any changes and display the previous page.


2.5 Adding and Editing Criteria Information


You can add and edit reporting criteria information using the [Criteria options](#) on the *Criteria/Logic Sets* tab in the *Reporting Specification* page.

You use the criteria options to capture information such as a diagnosis that can be input in a diagnosis field or captured in an active problem list. Each criterion is tied to logic that is supported by [value sets](#). These are represented by means of [criteria templates](#) that provide pre-populated options used to create jurisdiction specific criteria using the options on the *Criteria* window. As you add and edit criteria information on the [Criteria/Logic Sets tab](#) that information is updated in the [Specifications tab](#). For more detail on logic sets, refer to [Section 2.4, Adding and Editing Logic Set Information](#).

Note the *Criteria Template*, *Criteria Label* and *Criteria Input* options are *read-only* when you are signed-in as a *Jurisdiction Administrator*.

Perform the following steps:

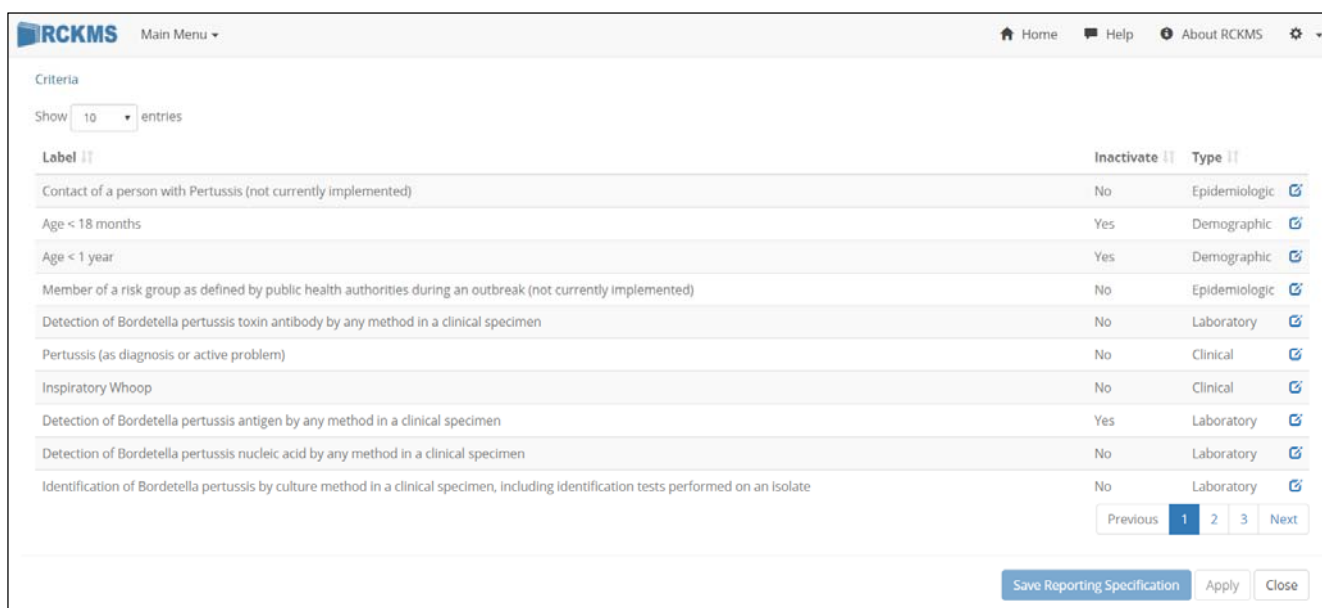
1. Press the **Page Down** key or scroll down in the [Criteria/Logic Sets tab](#) in the *Reporting Specification* page to display the *Criteria* section.
2. Do one of the following:
 - To edit a criterion, click the **Edit**  icon for the criterion you want in the [Criteria section](#). RCKMS displays the [Edit Criteria window](#).
 - To add a criterion, click the **New Criteria** button in the [Criteria section](#). RCKMS displays the [New Criteria window](#).
3. Optionally, click **Inactivate** to inactivate the criteria. Inactivate removes criteria from display in the Specifications tab while keeping the information in the Logic Set/Criteria tab for you to restore later.
4. Click the **Save Criteria** button. RCKMS saves the criteria information and displays the [Criteria section](#) of the *Criteria/Logic Set* tab in the *Reporting Specification* page.

You can also delete criteria by clicking the **Delete**  icon for the criterion you want. Note that once you delete a criterion, it cannot be recovered. When you delete a criterion, the criterion and logic set organizing it no longer display in the [Specifications tab](#).

As you add, edit and delete criteria information on the [Criteria/Logic Sets tab](#), that information is updated in the [Specifications tab](#). To work with criteria and logic sets in the [Specifications tab](#), refer to [Section 2.6, Adding and Editing Specification Information](#).

2.5.1 Criteria/Logic Sets tab – Criteria section




The *Criteria* section in the *Criteria/Logic Sets* tab in the *Reporting Specification* page displays the reporting specification's criteria information.




Label	Inactivate	Type
Contact of a person with Pertussis (not currently implemented)	No	Epidemiologic
Age < 18 months	Yes	Demographic
Age < 1 year	Yes	Demographic
Member of a risk group as defined by public health authorities during an outbreak (not currently implemented)	No	Epidemiologic
Detection of Bordetella pertussis toxin antibody by any method in a clinical specimen	No	Laboratory
Pertussis (as diagnosis or active problem)	No	Clinical
Inspiratory Whoop	No	Clinical
Detection of Bordetella pertussis antigen by any method in a clinical specimen	Yes	Laboratory
Detection of Bordetella pertussis nucleic acid by any method in a clinical specimen	No	Laboratory
Identification of Bordetella pertussis by culture method in a clinical specimen, including identification tests performed on an isolate	No	Laboratory

The following table details the options on the page.

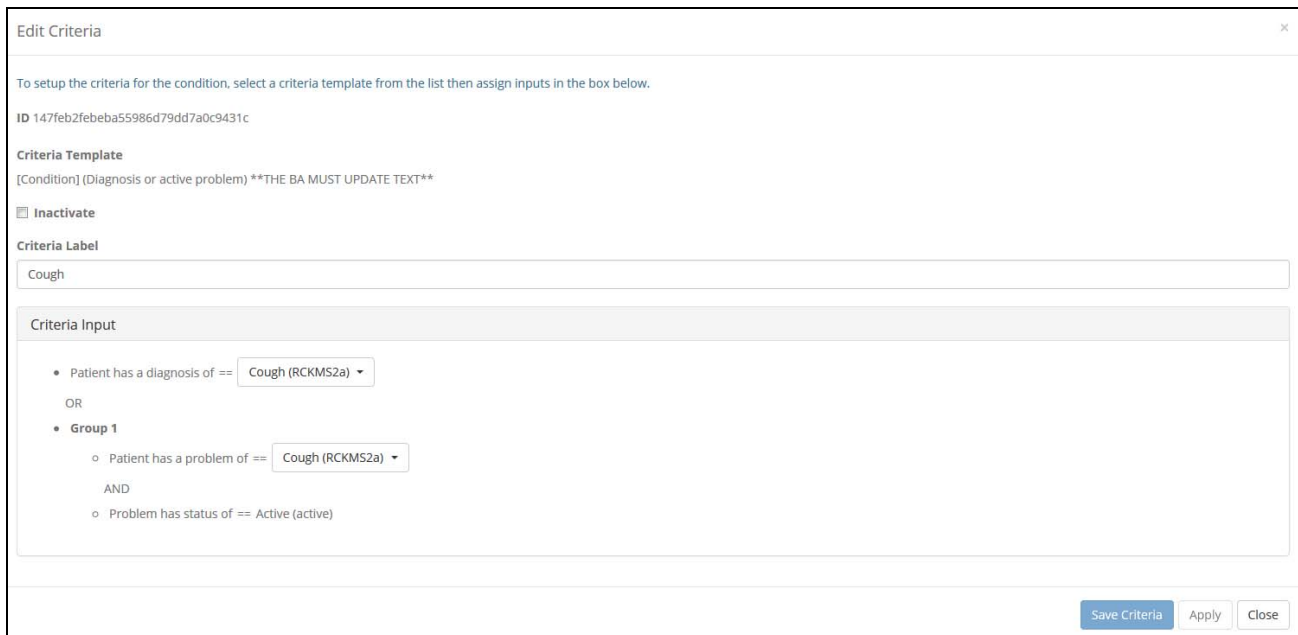
Item	Description
Show entries	Click drop-down and choose the number of items to display in the grid.
Label	The criteria label.

Item	Description
Type	The criteria type. Options include Laboratory, Clinical, Epidemiologic and Demographic.
Inactivate	Indicates if the criteria is active or inactive.
 Edit	Click to edit the selected item.
 Delete	Click to delete the selected item.
Previous	Click to navigate back through the list of items available.
Next	Click to navigate forward through the list of items available.
New Criteria	Click to add a new criteria and display the Click the  Sort icon at the top of each column to sort the information. Criteria window.
Save Reporting Specification	Click to save the reporting specification.
Apply	Click to save your changes and keep the window open.
Cancel/Close	Click to cancel your changes, or close if you have not made any changes and display the previous page.

Click the  **Sort** icon at the top of each column to sort the information.

2.5.2 Criteria window

The *Criteria* window displays the options for [adding and editing reporting criteria information](#). You can [add new criteria or edit existing criteria](#).



Note the *Criteria Template*, *Criteria Label* and *Criteria Input* options are read-only when you are signed-in as a Jurisdiction Administrator or when editing existing criteria.

The following table details the options on the page.

Item	Description
ID	A system-assigned unique identifier for the criterion. This field is read-only.

Item	Description
Criteria Template	The template of pre-populated options upon which the criteria is based. Click Criteria Template and choose the option you want. RCKMS displays the options at the bottom of the window. The <i>Criteria Template</i> options are <i>read-only</i> when you are signed-in as a <i>Jurisdiction Administrator</i> or when editing existing criteria.
Inactivate	Click to inactivate the selected criterion.
Criteria Label	The label identifying the criterion name. Click Criteria Label and type the label you want. On selection of the <i>Criteria Template</i> option RCKMS displays sample text in the <i>Criteria Label</i> field. The <i>Criteria Label</i> options are <i>read-only</i> when you are signed-in as a <i>Jurisdiction Administrator</i> .
Criteria Input	The values, codes and operators comprising the logic for the criterion. To add or edit <i>Criteria Input</i> 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 <i>Criteria Input</i> options are read-only when you are signed-in as a <i>Jurisdiction Administrator</i> .
Save Criteria	Click to save the criteria information.
Apply	Click to save your changes and keep the window open.
Cancel/Close	Click to cancel your changes, or close if you have not made any changes and display the previous page.

2.6 Adding and Editing Specification Information

You can add and edit reporting timeframe information and indicate if the criteria for a logic set is Sufficient, Necessary or Optional using the [Specifications tab](#) options in the *Reporting Specification* page.

For each logic set you can define a Reporting Timeframe. And for each criterion you can select reporting rules options indicating if a criterion is Sufficient, Necessary or Optional for reporting.

The reporting rules indicate one of the following:

Item	Description
Sufficient	Presence of this criteria alone indicates sufficient requirement for reporting. For example, three criteria each indicate <i>Sufficient</i> . If any one of the three criteria is met, then the user must report.
Necessary	Presence of this criteria with other criteria (either <i>Necessary</i> or <i>Optional</i>) is needed to meet the requirement for reporting. For example, three criteria each indicate <i>Necessary</i> . If all three criteria are met, then the user must report. If only one or two criteria are met, then the user does not report.
Optional	Within a group of Optional criteria, at least one <i>Optional</i> criteria is needed. <i>Optional</i> criteria must be paired with at least one <i>Necessary</i> criteria in order to meet the requirement for reporting. For example, Criteria 1 is <i>Necessary</i> and Criteria 2 and 3 are <i>Optional</i> . If Criteria 1 is met, AND either Criteria 2 or 3 (or both) is met, then the user must report. If only Criteria 2 and 3 are met, then the user does not report.

In short, *Sufficient* means that the criterion alone makes this reportable to the PHA. *Necessary* and *Optional* typically work together, in most instances with all *Necessary* criteria in addition to at least one *Optional* criteria required for reporting.

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*.

2.6.1 Specifications tab

The *Specifications* tab displays the criteria and logic sets rendered as a grid. It also displays options indicating the reporting timeframe and reporting rules options to indicate if the criteria are Sufficient, Necessary or Optional for reporting.

The screenshot displays the 'Edit Reporting Specification' interface. The 'Specifications' tab is active, showing a table with columns for different reporting categories and rows for various clinical and laboratory criteria. The 'Reporting Timeframe' row is expanded, showing input fields for number and unit for each category. The 'Clinical' section includes criteria like Apnea, Cough, Inspiratory Whoop, Paroxysmal Cough, and Pertussis (as diagnosis or active problem). The 'Laboratory' section includes 'Detection of Bordetella pertussis antibody by any method'. The 'Necessary' and 'Sufficient' options are visible in the reporting rules dropdowns.

Reporting Specifications	Lab Reporting (Lab1)	Provider/Facility Reporting (CLIN)	Provider/Facility Reporting (CLIN+EPI)	Provider/Facility Reporting (DX)	Provider/Facility Reporting (Lab)
Reporting Timeframe	3 days(s)	3 days(s)	3 days(s)	3 days(s)	3 days(s)
Clinical					
Apnea					
Cough		Necessary	Necessary		
Inspiratory Whoop		Necessary			
Paroxysmal Cough					
Pertussis (as diagnosis or active problem)				Sufficient	
Post-tussive Vomiting					
Laboratory					
Detection of Bordetella pertussis antibody by any method					

Buttons: Save Reporting Specification, Apply, Close


The following table details the options on the page.

Item	Description
Criteria	On the left hand side of the window, the criteria needed for reporting are arranged by group, such as clinical and laboratory. The criteria represent the narrative descriptions determining whether a case should be reported to public health.
Logic Sets	On the right are the logic set columns indicating when the indicated type of reporter such as a lab or provider would report and what is required for reporting using the Sufficient, Necessary, and Optional options.
Reporting Timeframe	The time required for reporting. Click the <i>number</i> text box and type or choose the number you want for the logic set you want. Click the <i>unit</i> text box and choose the option you want. Number refers to the count and Unit refers to the time element, such as days, weeks etc.
Reporting Rules	Click the reporting rules drop-down corresponding to the criterion and logic set you want and choose the option you want. You can choose Sufficient, Necessary or Optional.
Save Reporting Specification	Click to save the reporting specification and display the previous page.
Apply	Click to save your changes and keep the window open.
Cancel/Close	Click to cancel your changes, or close if you have not made any changes and display the previous page.

2.7 Adding and Editing Internal Reference Information

You can add and edit internal references to links and documents for use by the PHA (not sent to the reporter) using the [Internal References tab](#) options.

Perform the following steps:

1. Click the **Internal References** tab in the *Reporting Specification* page. RCKMS displays the contents of the *Internal References* tab.
2. Do the one of following:
 - To edit existing internal reference information, click the **Edit**  icon for the item you want. RCKMS displays the [Edit Reference window](#).
 - 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. Optional – Click **Add Reference File** and use **Chose File** button to upload a New Reference File. Click the **Save Reference File** button to return to the previous screen. Or use **Apply** to stay on the New Reference File screen.

10. Click the **Save Condition Reference** button. RCKMS saves your changes and displays the *Internal References* tab. Or click **Apply** and remain on the New Reference or Edit Reference screen.

Important. Internal reference items must be unique within the reporting specification and you cannot display the same reference item in both the Internal References and External References tabs.

2.7.1 Internal References tab

The *Internal References* tab displays information such as text, links to web sites, documents and other modes of information for use by the PHA.

The screenshot shows the 'Edit Reporting Specification' page in RCKMS. The 'Internal References' tab is active. The table contains one entry for 'Whooping Cough (Pertussis) in Michigan' with a URL and an excerpt. The interface includes a search bar, a '+ Add Internal Reference' button, and 'Save Reporting Specification', 'Apply', and 'Cancel' buttons at the bottom.

The following table details the options on the page.

Item	Description
Show entries	Click drop-down and choose the number of items to display in the grid.
Name	The name of the internal reference.
Description	The description of the internal reference.
URL	The URL for the internal reference.
Excerpt	An excerpt from the internal reference.
Files	The "paperclip" icon indicates a file is attached to the internal reference. It can be downloaded from the Edit Internal Reference screen.
Edit	Click to edit the selected item.
Delete	Click to delete the selected item.
Previous	Click to navigate back through the list of items available.
Next	Click to navigate forward through the list of items available.
Add Internal Reference	Click to add a new internal reference and display the <i>New Reference</i> window.
Save Condition Reference	Click to save the reference information and return to previous page.
Apply	Click to save your changes and keep the window open.
Cancel/Close	Click to cancel your changes, or close if you have not made any changes and display the previous page.

Click the **Sort** icon at the top of each column to sort the information.

2.7.2 Reference window

The *Reference* window displays the details of the selected reference item, including name, URL, priority and category. You use the *Reference* window to [add and edit reference information](#).

The following table details the options on the page.


Item	Description
Name	The name of the reference.
URL	The URL for the reference.
URL Priority	The priority of the URL for the internal reference. Options include Action Recommended, Action Required and Information Only.
URL Category	The category of the URL for the reference. Options include Laboratory Requirements, Reporting Requirements, and Specimen Submission Instructions, among others.
Description	The description of the reference.
Excerpt	An excerpt from the reference.
Add Reference Files	The fields related to an internal reference file.
File Name	The name of the reference file attached.
File Type	The format of the reference file attached.
Download	The arrow icon can be clicked to download the attached reference file.
Edit	Click to edit the selected item.
Delete	Click to delete the selected item.
Add Reference File	The button used to add additional internal reference files.
Save Condition Reference	Click to save the reference information.
Apply	Click to save your changes and keep the window open.
Cancel/Close	Click to cancel your changes, or close if you have not made any changes and display the previous page.

2.8 Adding and Editing External Reference Information

You can add and edit external references to links and documents to be sent to the reporter using the [External References tab](#) options.

You can order the display of external reference information on the Reportability Response by means of the *URL Priority* and *URL Category* options; first by priority and then by category.

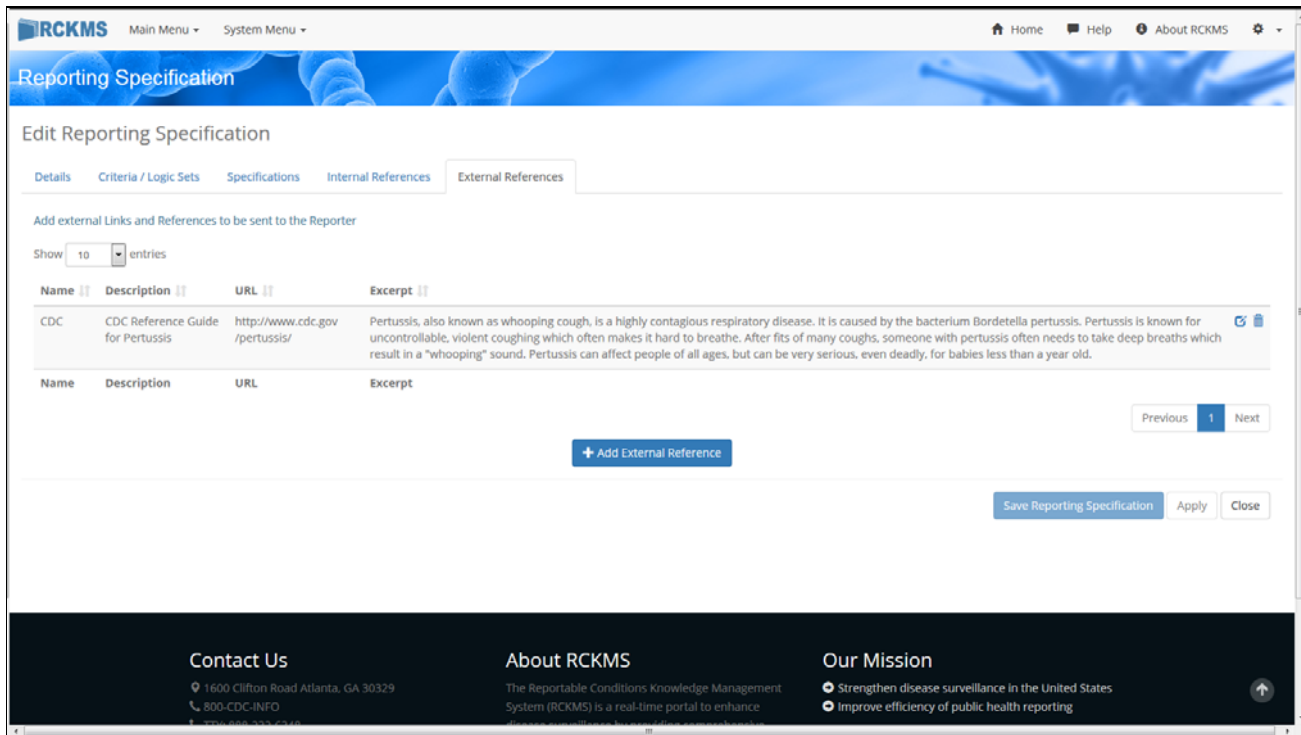
Perform the following steps:

1. Click the **External References** tab in the *Reporting Specifications* page. RCKMS displays the contents of the *External References* tab.
2. Do the one of following:
 - To edit existing external reference information, click the **Edit**  icon for the item you want. RCKMS displays the [Edit Reference window](#).
 - To add new external 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 the *External References* tab.



Important. External reference items must be unique within the reporting specification and you cannot display the same reference item in both the Internal References and External References tabs.


2.8.1 External References tab

The *External References* tab displays information such as text, links to web sites, documents and other modes of information that the PHA wants available to reporters.



The following table details the options on the page.

Item	Description
Show entries	Click drop-down and choose the number of items to display in the grid.
Name	The name of the external reference.
Description	The description of the external reference.
URL	The URL for the external reference.
Excerpt	An excerpt from the external reference.
 Edit	Click to edit the selected item.
 Delete	Click to delete the selected item.
Previous	Click to navigate back through the list of items available.
Next	Click to navigate forward through the list of items available.
Add External Reference	Click to add a new external reference and display the New Reference window .
Save Reporting Specification	Click to save the reporting specification.
Apply	Click to save your changes and keep the window open.
Cancel/Close	Click to cancel your changes, or close if you have not made any changes and display the previous page.

Click the  **Sort** icon at the top of each column to sort the information.

2.8.2 Reference window

The *Reference* window displays the details of the selected reference item, including name, description and URL. You use the *Reference* window to [add and edit reference information](#).

The following table details the options on the page.

Item	Description
Name	The name of the reference.
URL	The URL for the reference.
URL Priority	The priority of the URL for the reference. Options include Action Recommended, Action Required and Information Only. The <i>URL Priority</i> option orders the display of reference information on the Reportability Response, first by priority and then by category.
URL Category	The category organizing the URL for the reference. Options include Laboratory Requirements, Reporting Requirements, and Specimen Submission Instructions, among others. The <i>URL Category</i> option orders the display of reference information on the Reportability Response, first by priority and then by category.
Description	The description of the reference.
Excerpt	An excerpt from the reference.
Save Condition Reference	Click to save the reference information.
Apply	Click to save your changes and keep the window open.
Cancel/Close	Click to cancel your changes, or close if you have not made any changes and display the previous page.

2.9 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 saves your changes and displays the [Reporting Specification page](#) with 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. RCKMS displays unsaved information using red text indicating that you must save the reporting specification in order to preserve your changes.

2.10 Deploying the Reporting Specification

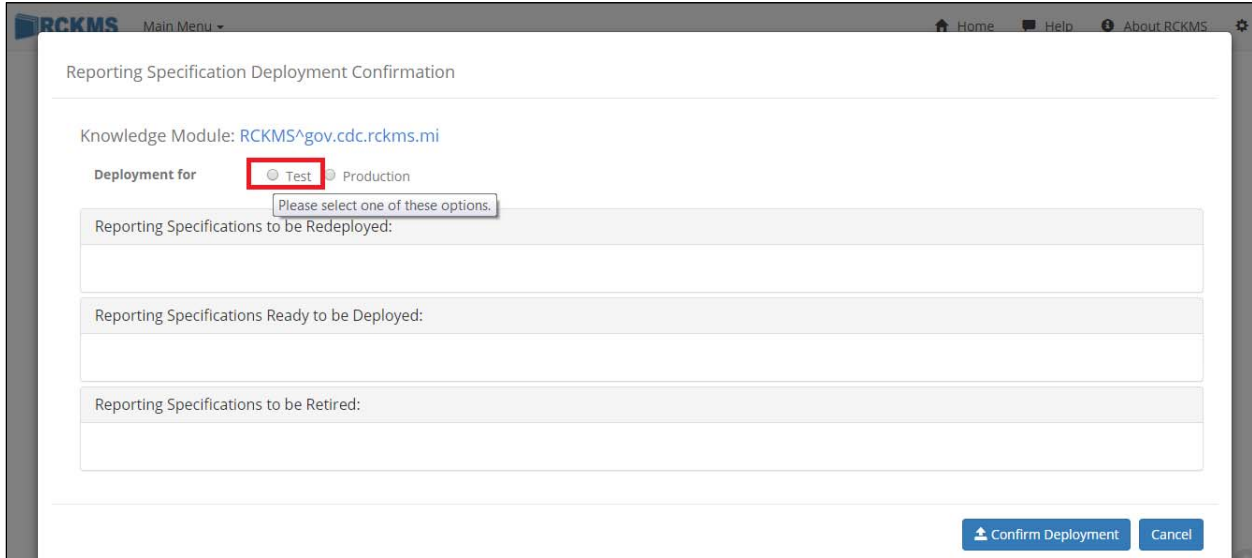
Once you finalize and save your work on the reporting specification, you must deploy it to the Decision Support Service rules engine in order for RCKMS to run the reporting specifications rules logic and respond on receipt of a record if it is reportable. The RCKMS workflow requires that you publish to Test before you can publish to Production.

2.10.1 Steps to Publish to Test:

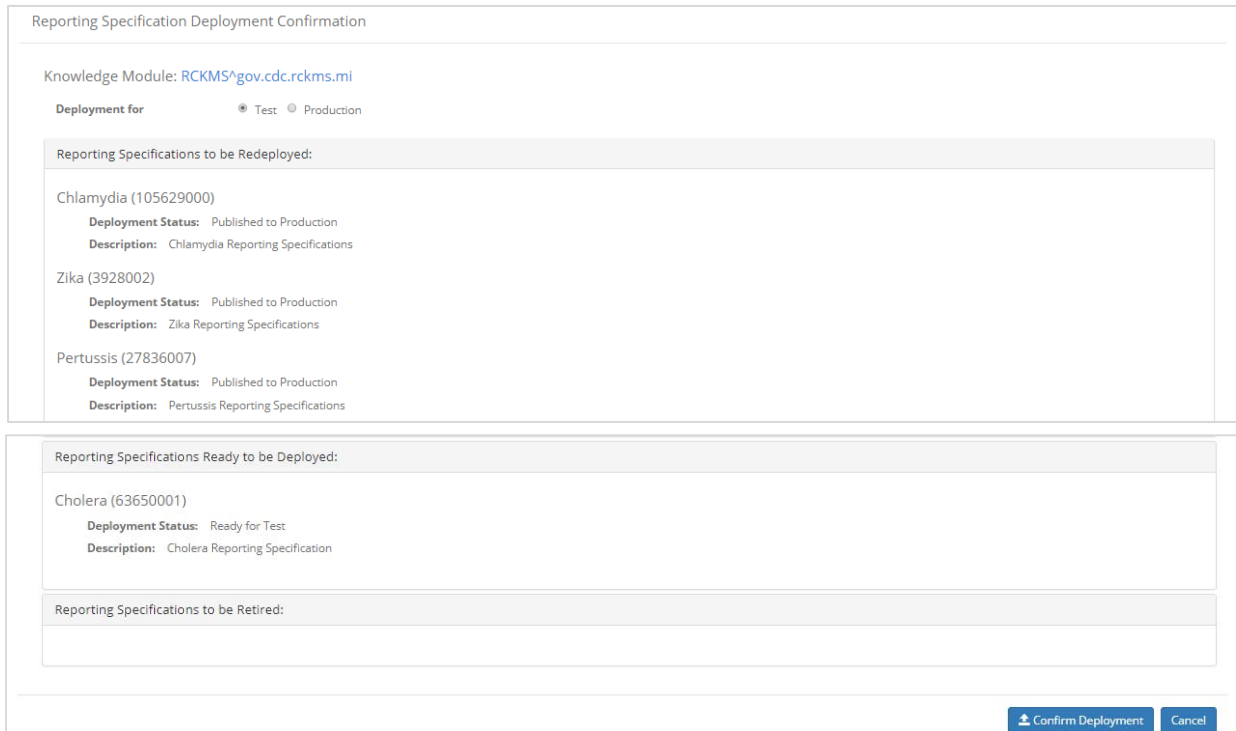
1. Do one of the following to publish to Test:
 - Click **Reporting Specifications** in the left navigation menu on the [Home page](#). The [Reporting Specification page](#) displays.
 - Click **Main Menu** in the menu bar at the top of the page and choose **Reporting Specifications**. The [Reporting 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 edit and add logic set and criteria information. To work with criteria and logic set information, refer to [Section 2.4, Adding and Editing Logic Set Information](#) and [Section 2.5, Adding and Editing Criteria Information](#).
 - ii. Click **Specifications** to edit and add Reporting Timeframe and decision logic information. To work with reporting timeframe and decision logic information, refer to [Section 2.6, Adding and Editing Specification Information](#).
 - iii. Click **Internal References** to edit and add internal links and reference information. To work with internal reference information, refer to [Section 2.7, Adding and Editing Internal Reference Information](#).
 - iv. Click **External References** to edit and add external links and reference information. To work with external reference information, refer to [Section 2.8, Adding and Editing External Reference Information](#).
 - v. Click **Details** to edit and add reporting specification detail information. To work with reporting specification details, refer to [Section 2.3, Editing Details Information](#).
4. Click **Status** in the [Details tab](#) and choose **Ready for Test**. (Note: you can use the **Assigned for Review** status prior to publishing to Test so others can review the reporting specification).
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 prompts you to confirm the deployment. There will be 3 sections on this confirmation:
 - a. Reporting Specifications to be Redeployed
 - b. Reporting Specifications Ready to be Deployed
 - c. Reporting Specifications to be Retired

Note: Reporting Specifications Ready to be Deployed can be in either Test or Production.




7. Click the **Test** radio button. Please review all 3 sections to confirm the reporting specifications that will be Redeployed, Deployed, and Retired. Note: Any specification in a “Published” status that may have been modified will be “Redeployed” with the new changes during the Deployment process.



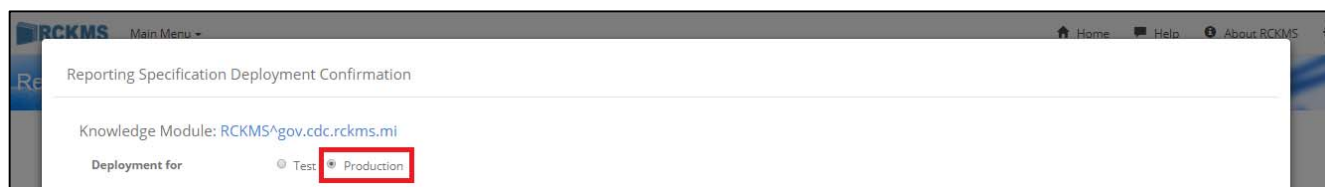
8. Click the **Confirm Deployment** button to deploy all listed reporting specifications.

9. **Published Deployment Results** page displays.
10. Click **Close** to exit Published Deployment Results page.

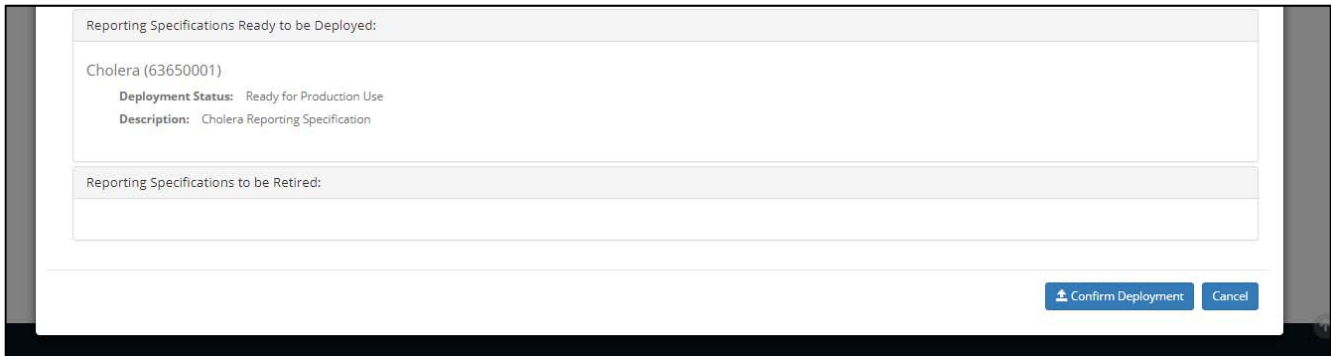
2.10.2 Steps to Publish to Production:

1. Do one of the following to publish to Production:
 - Click **Reporting Specifications** 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 Specifications**. 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 edit and add logic set and criteria information. To work with criteria and logic set information, refer to *Section 2.4, Adding and Editing Logic Set Information* and *Section 2.5, Adding and Editing Criteria Information*.
 - ii. Click **Specifications** to edit and add Reporting Timeframe and decision logic information. To work with reporting timeframe and decision logic information, refer to *Section 2.6, Adding and Editing Specification Information*.
 - iii. Click **Internal References** to edit and add internal links and reference information. To work with internal reference information, refer to *Section 2.7, Adding and Editing Internal Reference Information*.
 - iv. Click **External References** to edit and add external links and reference information. To work with external reference information, refer to *Section 2.8, Adding and Editing External Reference Information*.
 - v. Click **Details** to edit and add reporting specification detail information. To work with reporting specification details, refer to *Section 2.3, Editing Details Information*.
4. Click **Status** in the *Details* tab and choose **Ready for Production Use**.
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 prompts you to confirm the deployment. There will be 3 sections on this confirmation:
 - a. Reporting Specifications to be Redeployed
 - b. Reporting Specifications Ready to be Deployed
 - c. Reporting Specifications to be Retired

Note: *Reporting Specifications Ready to be Deployed* can be in either **Test** or **Production**.



7. Click the **Production** radio button. Please review all 3 sections to confirm the reporting specifications that will be Redeployed, Deployed and Retired. Note: Any specification in a “Published” status that may have been modified will be “Redeployed” with the new changes during the Deployment process.



8. Click the **Confirm Deployment** button to deploy all listed reporting specifications.
9. **Published Deployment Results** page displays.
10. Click **Close** to exit Published Deployment Results page.

Once you save and deploy the reporting specification, you can work with other parts of the RCKMS application. You can work with the Test Case module to [run test cases and validate the criteria and rules logic](#), use the Reports module to [run queries and display informational reports](#), as well as [manage jurisdiction detail information](#) using the Jurisdiction module.

To run test cases, refer to [Section 3, Running Test Cases and Viewing Results](#). To enter queries and generate report output, refer to [Section 4, Generating Queries and Report Output](#). To manage jurisdiction information, refer to [Section 5, Viewing and Editing Jurisdiction Information](#).

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3 Running Test Cases and Viewing Results

You can run a test case and view its results using the [Test Cases page](#). When you run a test case, the application simulates receipt of a report and moves that information through the logic chain defined for the reporting specification's criteria, logic sets and rules options. A successful test case provides you confirmation that the criteria and rules for a given reporter provide the expected results.

You use the *Test Cases* options to confirm the criteria as Sufficient, Necessary and Optional based on rules for the selected reporter type as displayed in the [Specifications tab](#). When you run a test case you are testing the logic set and rules for the reporting criteria associated with the selected reporter type. You can run the tests cases as presented or make changes to them to account for any jurisdiction-specific information.

For more detail on the Sufficient, Necessary and Optional notation, refer to [Section 2.6, Adding and Editing Specification Information](#). For more detail on reporting criteria, refer to [Section 2.5, Adding and Editing Criteria Information](#).

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 page](#).
 - Click **Main Menu** in the menu bar at the top of the page and choose **Test Cases**. RCKMS displays the [Test Cases page](#).
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 page](#), 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 page](#), with the summary results at the top of the page.
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](#).



Note that you can use the *Search* text box in the *Test Cases* page to search for the test case you want. 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.

3.1 Adding and Editing Test Cases

You can add new test cases and edit existing test cases.

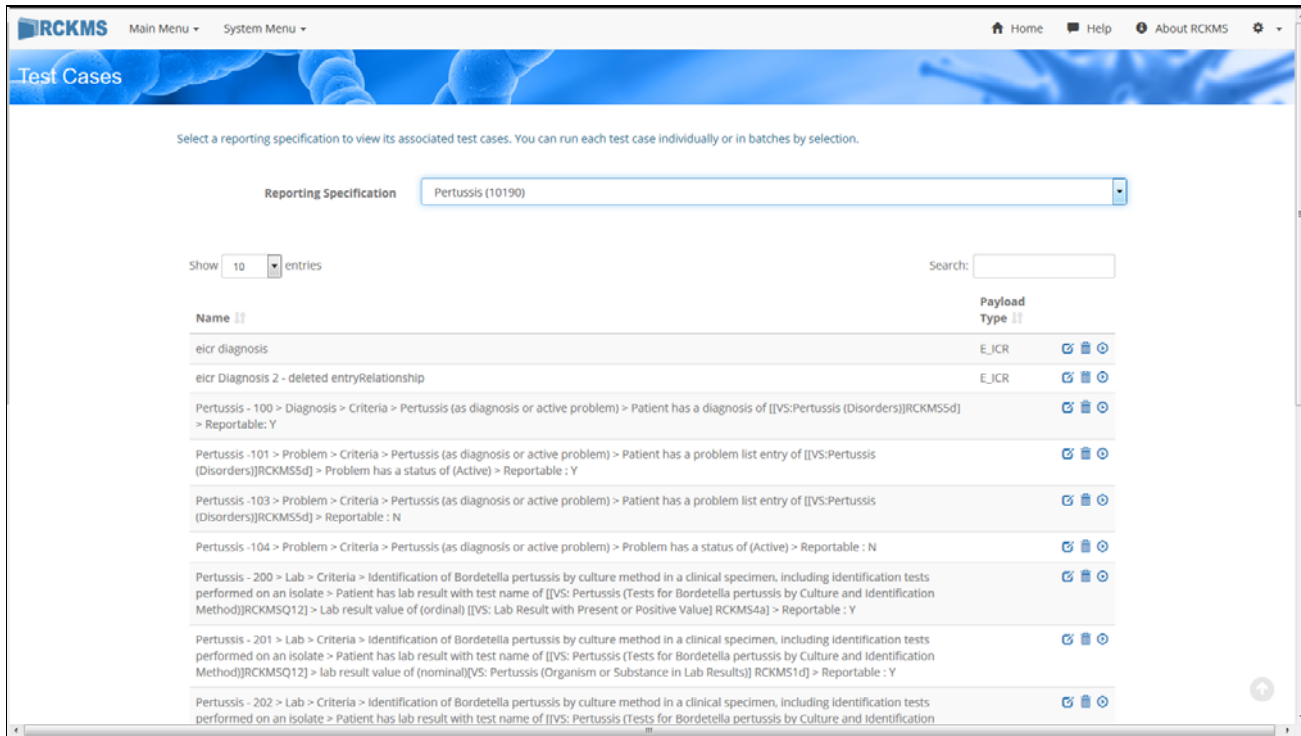
Perform the following steps:

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. Note that the *Reporting Specification* field is active only when you create a new test case. This field is read-only when editing an existing test case.
 - 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](#).
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 **Add Test Case Input button** in the [Test Case Inputs section](#). RCKMS displays the [New Test Case Input page](#).
 - 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.
 - 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](#).

3.1.1 Test Cases page

The *Test Cases* page displays a grid with the available test cases for the reporting specification.



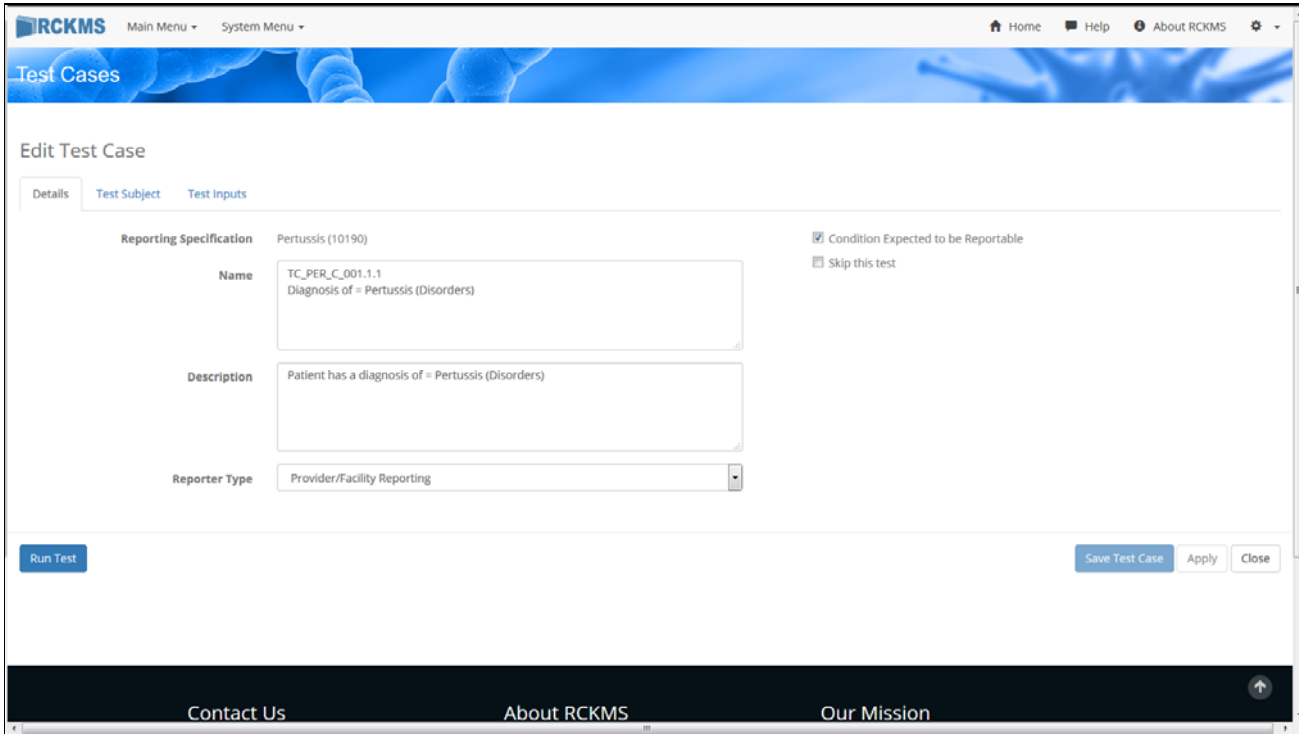
The following table details the options on the page.

Item	Description
Reporting Specifications	Click and choose the reporting specification for the condition you want.
Show entries	Click drop-down and choose the number of items to display in the grid.
Name	The test case name.
Payload Type	The payload type associated with the test case. Options include eICR and vMR.
Edit	Click to edit the selected item.
Delete	Click to delete the selected item.
Run Test	Click to run the test case.
Previous	Click to navigate back through the list of items available.
Next	Click to navigate forward through the list of items available.
Add Test Case	Click to add a new test case and display the New Test Case page .
Show entries	Click drop-down and choose the number of items to display in the grid.

Click the **Sort** icon at the top of each column to sort the information.

3.1.2 Details tab

The test case *Details* tab displays detail information on the test case, including the reporting specification, the test case name and reporter type, as well as options for expected reportability and skipping test execution.



The following table details the options on the page.

Item	Description
Reporting Specification	The reporting specification associated with the test case. Click to choose the condition you want.
Name	The test case name.
Description	The test case description, such as the rules and criteria to be tested.
Reporter Type	The reporter type associated with the test case.
Condition Expected to be Reportable	Click to indicate the condition is expected to be reportable.
Skip this test	Click to skip test execution.
Run Test	Click to run the test case. The <i>Run Test</i> button displays after you save the test case.
Save Test Case	Click to save the test case and display the Test Cases page .
Apply	Click to save your changes and keep the window open.
Cancel/Close	Click to cancel your changes, or close if you have not made any changes and display the previous page.

3.1.3 Test Subject tab

The *Test Subject* tab displays the test subject's gender and test type information, along with options for specifying offset and date-based testing.

The screenshot shows the 'Edit Test Case' interface in the RCKMS system. The 'Test Subject' tab is active. The form includes a 'Gender' dropdown menu currently set to 'Undifferentiated (UN)'. Below it, the 'Test Type' section has two radio buttons: 'Offset-Based' (selected) and 'Date-Based'. An 'Age Offset' text input field is positioned below the radio buttons. At the bottom of the form area, there are four buttons: 'Run Test', 'Save Test Case', 'Apply', and 'Cancel'. The footer of the page contains three columns of information: 'Contact Us' with address and phone numbers, 'About RCKMS' with a brief description of the system, and 'Our Mission' with two bullet points.

The following table details the options on the page.

Item	Description
Gender	The gender associated with the test case. Click and choose gender you want.
Offset Based	Click to indicate the test case is offset based on age criteria. On selection, RCKMS displays the <i>Age Offset</i> field.
Age Offset	Click and type the offset age.
Date-based	Click to indicate the test case is date-based according to date of birth and date of execution. On selection, RCKMS displays the <i>Date of Birth</i> , <i>Execution Date</i> and <i>Age at Execution</i> fields.
Date of Birth	The date of birth.
Execution Date	The date of execution.
Age at Execution	The age of execution for date-based testing.
Run Test	Click to run the test case. The <i>Run Test</i> button displays after you save the test case.
Save Test Case	Click to save the test case and display the Test Cases page .
Apply	Click to save your changes and keep the window open.
Cancel/Close	Click to cancel your changes, or close if you have not made any changes and display the previous page.

3.1.4 Test Inputs tab













The *Test Inputs* tab displays options for indicating reportability, test source and criteria detail information.


The screenshot shows the 'Edit Test Case' page in the RCKMS application. The 'Test Inputs' tab is active. At the top, there are navigation menus for 'Main Menu' and 'System Menu', and utility links for 'Home', 'Help', and 'About RCKMS'. The page title is 'Test Cases'. Below the title, there are three tabs: 'Details', 'Test Subject', and 'Test Inputs'. A instruction reads: 'Specify the input source for the test case (criteria or file), then either add the appropriate inputs from a criteria template or upload a file from your computer containing the same information.' Below this, there are radio buttons to 'Select a Test Source' with 'Criteria' selected and 'File' unselected. The 'Test Case Inputs' section contains three input fields: 'Label' (with the value 'Pertussis (Diagnosis or active problem)'), 'Criteria Type' (with the value 'TESTCASE'), and 'Method' (with the value 'DIAGNOSIS'). Below these fields is a blue button labeled '+ Add Test Case Input'. The 'Expected Criteria' section contains one input field: 'Label' (with the value 'Pertussis (as diagnosis or active problem)'). Below this field is a blue button labeled '+ Add Expected Criteria'.

The *Test Inputs* tab enables you to specify the input source for the test case as either criteria or file-based. Depending on your selection, you can either add the appropriate inputs from a criteria template or upload a file from your computer containing the same information. You can also enter the criteria expected to fire on execution of the test case.

The following table details the options on the page.

Item	Description
Criteria	Indicates the test source is criteria-based. Click Criteria to indicate criteria-based testing. On selection, RCKMS displays the <i>Test Case Inputs</i> options you use to enter the criteria to be tested.
File	Indicates the test source is based on a file payload. Click File to indicate file-based testing. On selection, RCKMS displays the <i>Payload Type</i> options, eICR and vMR.
Payload Type	Indicates the file payload is eICR or vMR. Choose the option you want. On selection, RCKMS displays the <i>Browse</i> button. Click Browse to select the file you want.
Browse	Click and choose the file you want.

Item	Description														
Test Case Inputs	<p>Displays the reporting criteria information to be tested.</p> <p>The <i>Test Case Input</i> table includes the following columns.</p> <table border="1"> <thead> <tr> <th>Item</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Label</td> <td>The descriptive name of the reporting criteria to be tested.</td> </tr> <tr> <td>Criteria Type</td> <td>The criteria type.</td> </tr> <tr> <td>Method</td> <td>The test case method.</td> </tr> <tr> <td> Edit</td> <td>Click to edit the selected item.</td> </tr> <tr> <td> Delete</td> <td>Click to delete the selected item.</td> </tr> <tr> <td>Add Test Case Input</td> <td>Click to enter a new test case input and display the New Test Case Input page.</td> </tr> </tbody> </table>	Item	Description	Label	The descriptive name of the reporting criteria to be tested.	Criteria Type	The criteria type.	Method	The test case method.	 Edit	Click to edit the selected item.	 Delete	Click to delete the selected item.	Add Test Case Input	Click to enter a new test case input and display the New Test Case Input page .
Item	Description														
Label	The descriptive name of the reporting criteria to be tested.														
Criteria Type	The criteria type.														
Method	The test case method.														
 Edit	Click to edit the selected item.														
 Delete	Click to delete the selected item.														
Add Test Case Input	Click to enter a new test case input and display the New Test Case Input page .														
Expected Criteria	<p>Displays the expected criteria to fire on test execution.</p> <p>The <i>Expected Criteria</i> table includes the following columns.</p> <table border="1"> <thead> <tr> <th>Item</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Label</td> <td>The descriptive name of the expected criteria.</td> </tr> <tr> <td> Edit</td> <td>Click to edit the selected item.</td> </tr> <tr> <td> Delete</td> <td>Click to delete the selected item.</td> </tr> <tr> <td>New Expected Criteria</td> <td>Click to enter a new expected criteria and display the New Expected Criteria page.</td> </tr> </tbody> </table>	Item	Description	Label	The descriptive name of the expected criteria.	 Edit	Click to edit the selected item.	 Delete	Click to delete the selected item.	New Expected Criteria	Click to enter a new expected criteria and display the New Expected Criteria page .				
Item	Description														
Label	The descriptive name of the expected criteria.														
 Edit	Click to edit the selected item.														
 Delete	Click to delete the selected item.														
New Expected Criteria	Click to enter a new expected criteria and display the New Expected Criteria page .														
Run Test	Click to run the test case. The <i>Run Test</i> button displays after you save the test case.														
Save Test Case	Click to save the test case and display the Test Cases page .														
Apply	Click to save your changes and keep the window open.														
Cancel/Close	Click to cancel your changes, or close if you have not made any changes and display the previous page.														

Click the  **Sort** icon at the top of each column to sort the information.

3.1.5 Test Case Input window

The *Test Case Input* window displays the options for adding and editing reporting criteria information to be tested. You can [add test case input information or edit existing information](#).

The selected criteria template information displays at the top of the page, followed by the criteria label. And at the bottom of the page, you can choose the criteria inputs associated with the criteria template and make changes to the available predicate information.

The following table details the options on the page.

Item	Description
ID	A system-assigned unique identifier for the criterion. This field is read-only.
Criteria Template	The template of pre-populated options upon which the criteria is based. Click Criteria Template and choose the option you want. RCKMS displays the options at the bottom of the window. Note the <i>Criteria Template</i> options are read-only when editing existing criteria.
Criteria Label	The label identifying the criterion name. Click Criteria Label and type the label you want. On selection of the <i>Criteria Template</i> option RCKMS displays sample text in the <i>Criteria Label</i> field.
Criteria Input	The values, codes and operators comprising the logic for the criterion. To add or edit <i>Criteria Input</i> 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.
Save Test Case Input	Click to save the test case input information.
Apply	Click to save your changes and keep the window open.
Cancel/Close	Click to cancel your changes, or close if you have not made any changes and display the previous page.

3.1.6 Expected Criteria window

The *Expected Criteria* window displays options for selecting the expected condition criteria to fire on execution of the test case.

The following table details the options on the page.

Item	Description
Criteria Template	The template of pre-populated options upon which the criteria is based. Click Criteria Template and choose the option you want.
Save Expected Criteria	Click to save the test case input information.
Apply	Click to save your changes and keep the window open.
Cancel/Close	Click to cancel your changes, or close if you have not made any changes and display the previous page.

3.1.7 Test Results page

The *Test Results* page displays a summary of the results and options to display the test case details, including options for viewing and downloading XML representations of the test input and results output data.

Reporter Type	Provider/Facility Reporting	Duration	4732.397828 ms
Test Result	Passed		
Expected Reportable	Yes		
Actual Reportable	Yes		
Expected Reportable Condition	Pertussis (10190)		
Actual Reportable Conditions	Pertussis (10190)		
Expected Criteria Met	Pertussis (as diagnosis or active problem)		
Actual Criteria Met	Pertussis (as diagnosis or active problem)		

You can click the link to expand the section you want and view its details. Click **Close** to close the [Test Results page](#).

The [Test Results page](#) displays a summary of result information at the top of the page, followed by details on *Jurisdiction Information*, *Test Subject and Inputs*, *Logs and Messages*, and *Links and References* information. It also provides options for viewing and downloading the input and output XML files structuring the input and output data. You can click the link to expand the section you want and view its details. Click **Close** to close the *Test Results page*.

The test result compares the *Expected Reportable* information to that which you indicate as *Actual Reportable*. You indicate the *Expected Reportable* information using the *Condition Expected to be Reportable* option in the test case. The *Actual Reportable* information provides determination of whether the *Expected Reportable* Condition is reportable based on exercising the test input through all of a PHA's reporting specifications.

The results also display the *Expected Reportable Condition* which is set by selecting a condition under the *Reporting Specification* field in the test case. The results return the *Actual Reportable Conditions*, representing one or more conditions that are found to be reportable based on running the test input through all of a PHA's reporting specifications.

In addition, the test results display the *Expected Criteria Met*, which are set by selecting one or more criteria under *Expected Criteria* in the test case. Note that the *Expected Criteria Met* does not affect the test result outcome. The *Actual Criteria Met* represents one or more criteria that are met based on running the test input through all of a PHA's reporting specifications. Note that the *Actual Criteria Met* does not affect the test result outcome.

The following table details the options on the page.

Item	Description
Reporter Type	The reporter type associated with the test case.
Test Result	The test result. The test result compares the <i>Expected Reportable</i> information to that you indicate as <i>Actual Reportable</i> .
Expected Reportable	The tested condition expected to be reportable. You indicate the <i>Expected Reportable</i> information using the <i>Condition Expected to be Reportable</i> option in the test case.
Actual Reportable	The tested condition as actually reported. It represents the determination of whether the <i>Expected Reportable</i> Condition is reportable based on exercising the test input through all of a PHA's reporting specifications.
Expected Reportable Condition	The expected reportable condition tested. You indicate the <i>Expected Reportable Condition</i> by selecting a condition under the <i>Reporting Specification</i> field in the test case.

Item	Description
Actual Reportable Condition	The expected reportable condition as tested. It represents one or more conditions that are found to be reportable based on running the test input through all of a PHA's reporting specifications.
Expected Criteria Met	The expected criteria tested. The <i>Expected Criteria Met</i> does not affect the test result outcome. You indicate the <i>Expected Criteria Met</i> by selecting one or more criteria under <i>Expected Criteria</i> in the test case.
Actual Criteria Met	The actual criteria as tested. It represents one or more criteria that are met based on running the test input through all of a PHA's reporting specifications. The <i>Actual Criteria Met</i> does not affect the test result outcome.
Duration	The test case execution time in milliseconds.
Jurisdiction Information	Click to display jurisdiction information.
Test Subject	Click to display test subject information.
Test Inputs	Click to display test source and expected criteria information.
Logs and Messages	Click to display messages generated during test case execution indicating reportability outcome following test case execution.
Links and References	Click to display link and message information associated with the reporting criteria.
Input XML	Click to display vMR XML input file contents representing the information and options submitted in the test case.
Output XML	Click to display vMR XML output file contents representing the information and options resulting from the test case execution.
Close	Click to close and display the previous page.

4 Generating Queries and Report Output

You can enter queries and generate report output using the [Reports page](#). The Reports module provides a printable report or electronic file that contains the reporting specifications that were entered through the authoring tool.

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.

4.1 Reports page

The *Reports* page displays options for entering queries and viewing report output. You can choose the options you want and click **Run Report**.

The screenshot shows the RCKMS Reports page. At the top, there is a navigation bar with 'RCKMS', 'Main Menu', and 'System Menu'. On the right, there are links for 'Home', 'Help', and 'About RCKMS'. The main content area is titled 'Reports' and features a search icon. Below this is a form with the following fields:

- Report**: A dropdown menu with 'Select an Option' selected.
- Jurisdiction Scope**: A dropdown menu with 'Select an Option' selected.
- Status**: A dropdown menu with 'Select an Option' selected.
- Condition**: A dropdown menu with 'Select an Option' selected.

At the bottom of the form is a blue button labeled 'Run Report'. The footer of the page contains three columns of information:

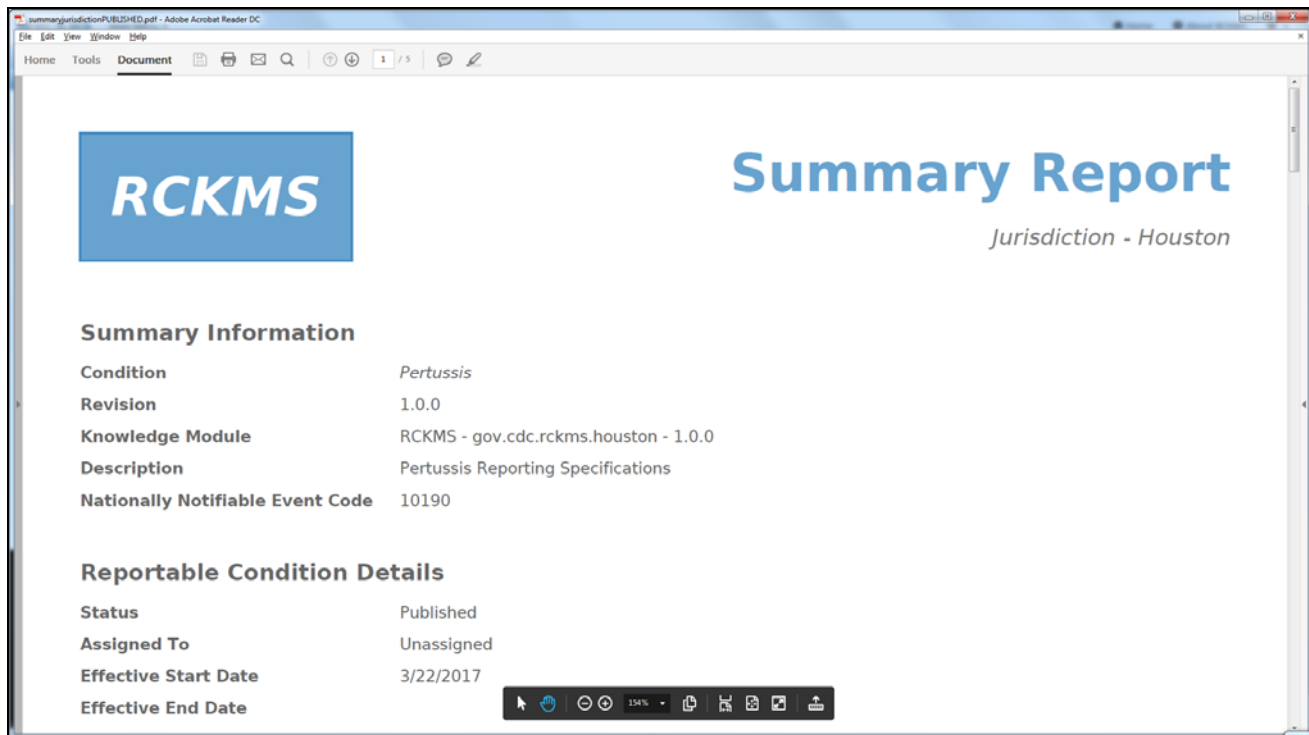
- Contact Us**: 1600 Clifton Road Atlanta, GA 30329; 800-CDC-INFO; TTY: 888-232-6348.
- About RCKMS**: The Reportable Conditions Knowledge Management System (RCKMS) is a real-time portal to enhance disease surveillance by providing comprehensive...
- Our Mission**: Strengthen disease surveillance in the United States; Improve efficiency of public health reporting.

The following table details the options on the page.

Item	Description
Report	Click to choose a summary or detailed report .
Jurisdiction Scope	Click to choose the jurisdiction to run the report. You can choose default to run a report for the default jurisdiction. Or you can click the <i>Jurisdiction</i> option and choose the jurisdiction you want. Clicking the <i>Jurisdiction</i> option displays the Jurisdiction drop-down.
Jurisdiction	Click the name of the jurisdiction you want. This option is hidden until you select <i>Jurisdiction</i> in the Jurisdiction Scope drop-down.
Status	Click to choose the status of the reporting specification.
Condition	Click to choose the condition you want.
Run Report	Click to run the query and display report output.

4.1.1 Summary Report

The [Summary Report](#) displays summary output of the reporting specification for the condition you select, along with instructions on how to read the reporting specifications and an explanation of the *Sufficient*, *Necessary* and *Optional* reporting rules.

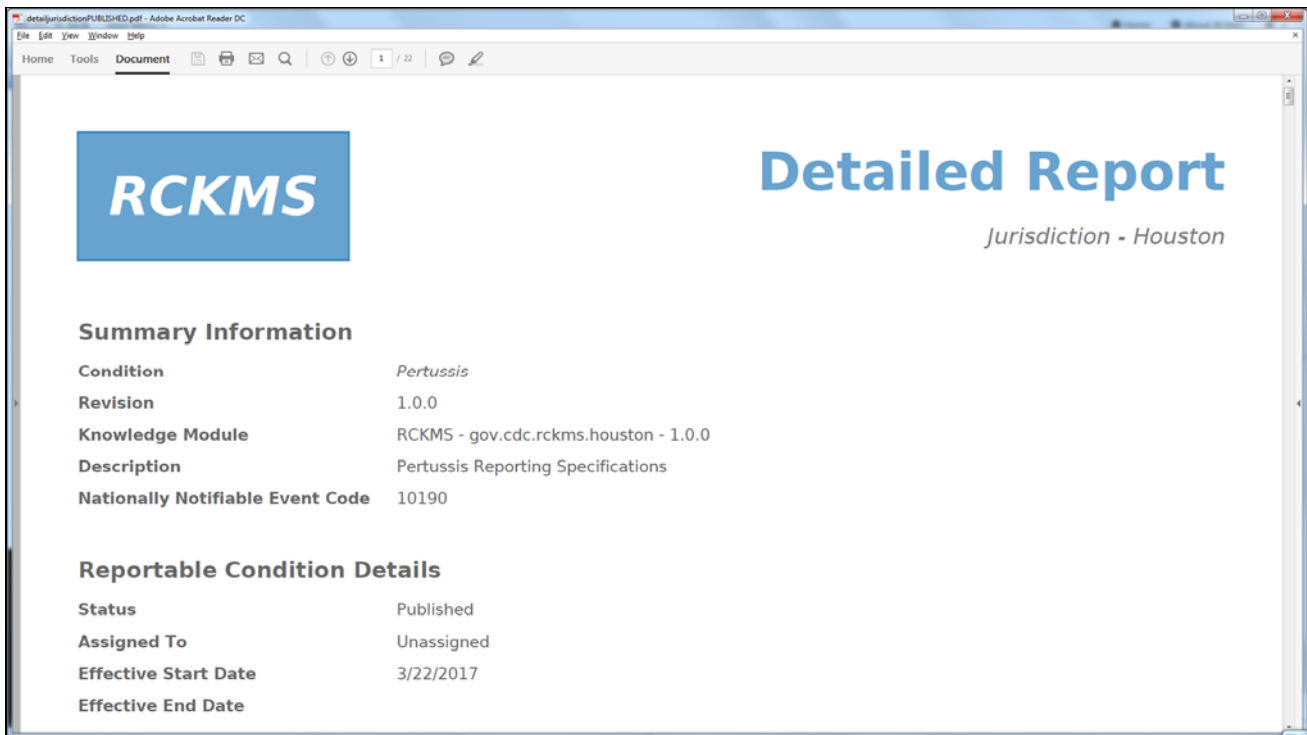


The *Summary Report* provides a high-level overview of the reporting specifications. It describes the data entered into the reporting specifications table through the authoring tool's Reporting Specification module. The report includes how logics sets are related to a condition's criteria through the Sufficient, Necessary,

Optional rules. The last page of the report provides instructions on how to read the Reporting Specifications and provides definitions of the Sufficient, Necessary, and Optional rules.

4.1.2 Detailed Report

The *Detailed Report* displays detailed output of the reporting specification for the condition you select, along with instructions on how to read the reporting specifications and an explanation of the Sufficient, Necessary and Optional reporting rules.




Detailed Reports should be read paired with the *Summary Report*. The *Detailed Report* includes the detailed definitions of the criteria referenced in the *Summary Report* and list the value sets and underlying codes used by the criteria in the reporting specifications for your PHA.

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5 Viewing and Editing Jurisdiction Information

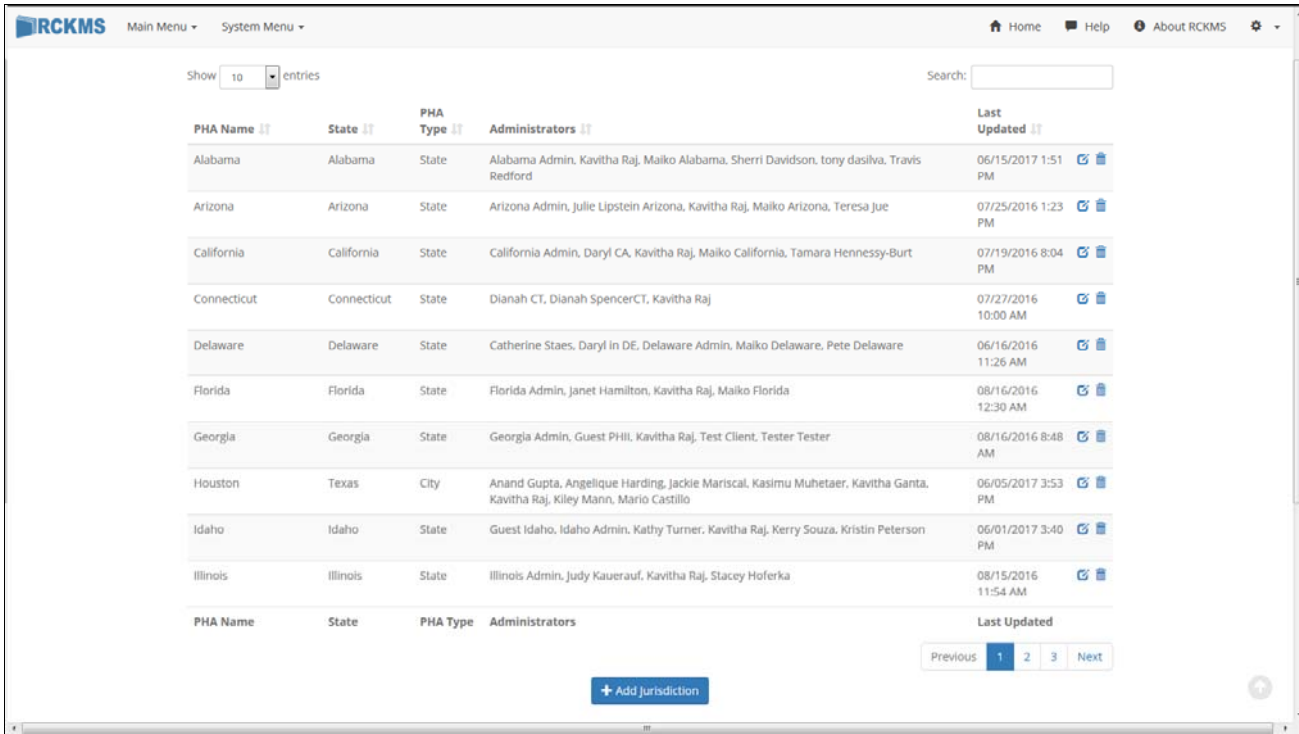
You can view and edit information about your jurisdiction using the Jurisdiction module. You can work with detail information about your Public Health Agency, view the status of the conditions and reporting specifications, as well as ZIP codes and users assigned to your jurisdiction.

Perform the following steps:

1. Click **Main Menu** in the menu bar at the top of the page and choose **Jurisdictions**. The *Jurisdiction* page displays.
2. Click the **Edit**  icon for the jurisdiction you want. RCKMS displays the [Jurisdiction window](#) and the contents of the *Public Health Agency Details* tab.
3. Do one of the following:
 - Click **Public Health Agency Details** to work with the PHA details. Options include, PHA Name and Type information, description and version information, as well as options for running alternate rules in the event rules don't exist for a selected condition and options for alternate routing of eICR and Reportability Response (RR) information.
 - Click **Conditions** to view the conditions and reporting specifications associated with your jurisdiction. Options include the name of the condition and the current status of the reporting specification.
 - Click **Zip Codes** to view the Zip codes included within your jurisdiction. Options include Zip Code, city, county and state.
 - Click **Users** to view the users within your jurisdiction. Options include the user name and email contact information.
4. Do one of the following:
 - Click **Apply**. RCKMS saves your changes and keeps the window open.
 - Click **Save Reporting Specification**. RCKMS displays the *Reporting Specification* page and the date and time of the last update.
 - Click **Close** to close the page if you have made no changes.
 - Click **Cancel** to cancel the operation and display the previous page.

5.1.1 Jurisdiction page



The *Jurisdiction* page display a list of all available jurisdictions. You can click the **Edit**  icon for the jurisdiction you want.




PHA Name	State	PHA Type	Administrators	Last Updated
Alabama	Alabama	State	Alabama Admin, Kavitha Raj, Maiko Alabama, Sherri Davidson, tony dasilva, Travis Redford	06/15/2017 1:51 PM
Arizona	Arizona	State	Arizona Admin, Julie Lipstein Arizona, Kavitha Raj, Maiko Arizona, Teresa Jue	07/25/2016 1:23 PM
California	California	State	California Admin, Daryl CA, Kavitha Raj, Maiko California, Tamara Hennessy-Burt	07/19/2016 8:04 PM
Connecticut	Connecticut	State	Dianah CT, Dianah SpencerCT, Kavitha Raj	07/27/2016 10:00 AM
Delaware	Delaware	State	Catherine Staes, Daryl in DE, Delaware Admin, Maiko Delaware, Pete Delaware	06/16/2016 11:26 AM
Florida	Florida	State	Florida Admin, Janet Hamilton, Kavitha Raj, Maiko Florida	08/16/2016 12:30 AM
Georglia	Georgia	State	Georgia Admin, Guest PHIL, Kavitha Raj, Test Client, Tester Tester	08/16/2016 8:48 AM
Houston	Texas	City	Anand Gupta, Angelique Harding, Jackie Mariscal, Kasimu Muhetaer, Kavitha Ganta, Kavitha Raj, Kiley Mann, Mario Castillo	06/05/2017 3:53 PM
Idaho	Idaho	State	Guest Idaho, Idaho Admin, Kathy Turner, Kavitha Raj, Kerry Souza, Kristin Peterson	06/01/2017 3:40 PM
Illinois	Illinois	State	Illinois Admin, Judy Kauerauf, Kavitha Raj, Stacey Hoferka	08/15/2016 11:54 AM

Note that Jurisdiction Administrators can only [view and edit information for their jurisdiction](#) and no other, while the RCKMS Administrator can view, edit and delete information for all jurisdictions.

The following table details the options on the page.

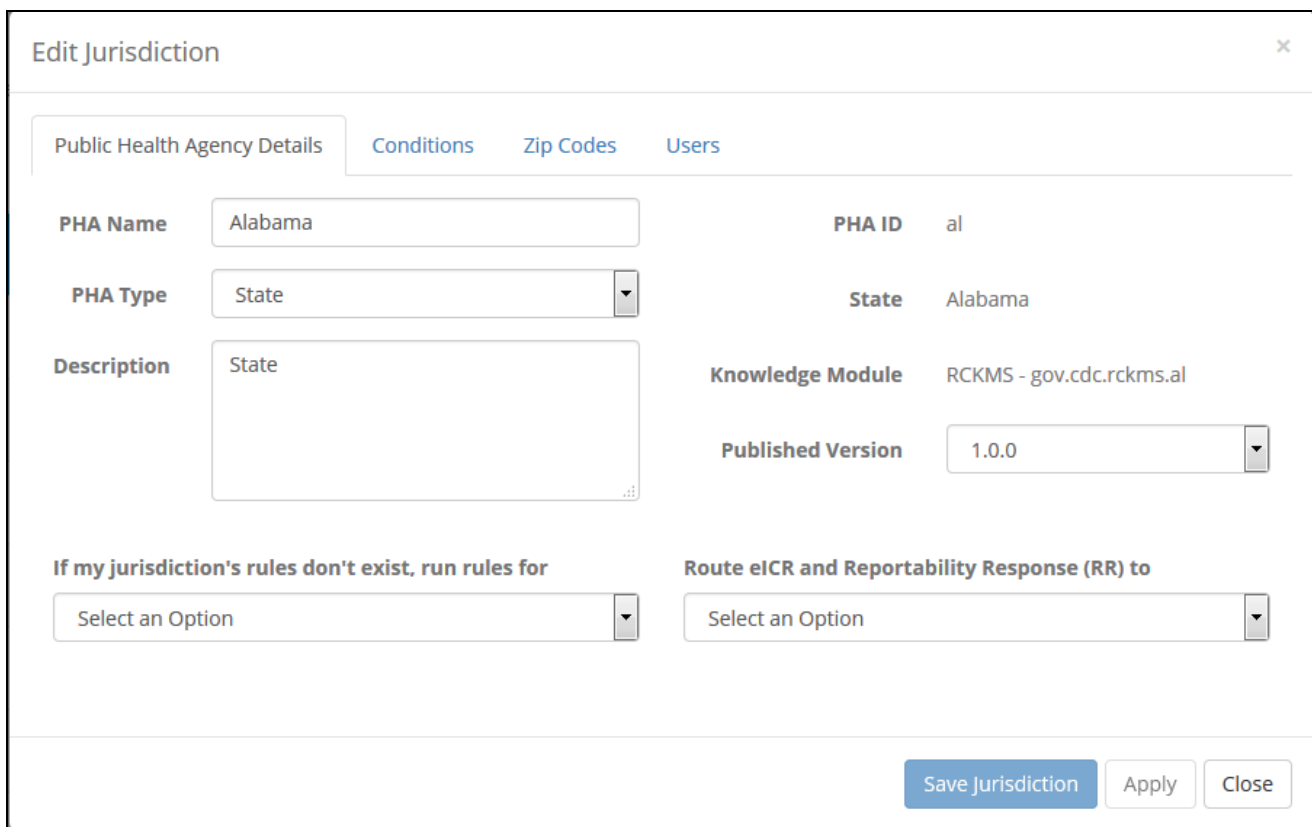
Item	Description
Show entries	Click drop-down and choose the number of items to display in the grid.
PHA Name	The name of the jurisdiction/Public Health Agency.
State	The state of the jurisdiction/Public Health Agency.
PHA Type	The type of public health agency. Options include State, Parish, District, County, City and Borough.
Administrators	The users assigned jurisdiction administrator rights.
Last Update	The date and time of the last update.
 Edit	Click to edit the selected item.
 Delete	Click to delete the selected item.
Previous	Click to navigate back through the list of items available.
Next	Click to navigate forward through the list of items available.

Item	Description
Add Jurisdiction	Click to add a new jurisdiction. Only RCKMS Administrators can add a new jurisdiction and this option does not display for Jurisdiction Administrator users.

Click the  **Sort** icon at the top of each column to sort the information.

5.1.2 Jurisdiction window

You use the *Jurisdiction* window to work with detail information about your Public Health Agency. It provides tabs to view the conditions and reporting specifications associated with your PHA, as well as ZIP codes and users associated within your PHA.



The screenshot shows the 'Edit Jurisdiction' window with the following fields and options:

- Public Health Agency Details** (selected tab):
 - PHA Name: Alabama
 - PHA Type: State
 - Description: State
 - PHA ID: al
 - State: Alabama
 - Knowledge Module: RCKMS - gov.cdc.rckms.al
 - Published Version: 1.0.0
 - If my jurisdiction's rules don't exist, run rules for: Select an Option
 - Route eICR and Reportability Response (RR) to: Select an Option
- Buttons: Save Jurisdiction, Apply, Close

The following table details the options on the page.

Item	Description
Public Health Agency Details	Click to work with the PHA details. Options include, PHA Name and Type information, description and version information, as well as options for running alternate rules in the event rules don't exist for a selected condition and options for alternate routing of eICR and Reportability Response (RR) information.
Conditions	Click to view the conditions and reporting specifications associated with your PHA. Options include the name of the condition and the current status of the reporting specification.

Item	Description
ZIP Codes	Click to view the ZIP codes included within your jurisdiction. Options include ZIP Code, City, County and State.
Users	Click to view the users within your PHA. Options include the user name and email contact information.
Save Jurisdiction	Click to save the jurisdiction information.
Apply	Click to save your changes and keep the window open.
Cancel/Close	Click to cancel your changes, or close if you have not made any changes and display the previous page.

Glossary

A

Association of Public Health Laboratories (APHL)

A non-profit membership organization consisting of local, territorial, county and state public health laboratories; environmental, agricultural and veterinary laboratories; and corporations and individuals with an interest in public health and laboratory science.

APHL Informatics Messaging Service (AIMS)

A secure cloud-based environment that accelerates the implementation of health messaging by providing shared services to aid the transport, validation, translation and routing of electronic data.

Authoring Interface

The web portal where information about RCKMS reporting criteria is entered, stored, and processed. The authoring interface is pre-populated with reporting specifications and the public health agencies can either use these defaults or change them to meet their needs.

B

C

Codes

Numerical values (codes) and human-readable names (terms), drawn from standard vocabularies such as SNOMED CT, RxNorm, LOINC and ICD-10-CM. See also [Value Set](#).

Council of State and Territorial Epidemiologists (CSTE)

A non-profit membership organization consisting of local, territorial, county and state public health epidemiologists representing multiple levels of public health practice. CSTE works to advance public health policy and epidemiologic capacity. It provides information, education, and developmental support of practicing epidemiologists, as well as expertise, technical advice and assistance for program and surveillance efforts to partner organizations and federal public health agencies such as the Centers for Disease Control and Prevention in a broad range of areas including occupational health, infectious diseases, environmental health, chronic diseases, injury control, maternal and child health.

Criteria Templates

The template of pre-populated options upon which the criteria is based. Each criterion is tied to logic that is supported by value sets and are represented by criteria templates.

Criteria

The narrative descriptions determining whether a case should be reported to public health. In the RCKMS application, you use the criteria options to capture information such as a diagnosis that can be input in a

diagnosis field or captured in an active problem list. Each criterion is tied to logic that is supported by value sets and are represented by means of criteria templates that provide pre-populated options used to create jurisdiction specific criteria using the options on the Criteria window.

D

Decision Support Service (DSS)

A service linked to provider electronic health records system that providers can query to determine if a case should be reported and if so to where. The DSS uses the criteria and rules logic you entered using the RCKMS authoring interface to evaluate an eICR and determine reportability. After the patient visits the provider, the encounter information is recorded in the EHR. If the EHR detects information that suggests a suspected case, the EHR will call the DSS, which provides the [Reportability Response](#).

Deploy

In the RCKMS application, the process by which a completed and saved reporting specification is made available to the Decision Support Service rules engine to run the rules logic and respond on receipt of a record and determine if it is reportable.

Determination of Reportability

The process of reviewing an initial core message against rules logic to assess if a case report should be sent to a jurisdiction based on the jurisdiction's reporting specifications. RCKMS centralizes this function in the Decision Support (DSS) shared service.

Default Content

The reporting specifications for each of the conditions pre-populated in the RCKMS and made available through the web site.

Details tab

The RCKMS application page that displays basic information about the reporting specification for the selected condition. It displays status and effective date information, as well as the reporting preference options.

Detailed Report

The RCKMS application page that displays detailed output of the reporting specification for the condition you select, along with instructions on how to read the reporting specifications and an explanation of the Sufficient, Necessary and Optional rules. Detailed Reports should be read paired with the Summary Report. The Detailed Report includes the detailed definitions of the criteria referenced in the Summary Report and list the value sets and underlying codes used by the criteria in the reporting specifications for your PHA.

Digital Bridge

An initiative supported by the Robert Wood Johnson Foundation and the deBeaumont Foundation and managed by the Public Health Informatics Institute and Deloitte to improve public health capacity by

enhancing information exchange between health care and public health. Digital Bridge facilitates collaboration across public health, health care and health information technology design and implement a multi-jurisdictional approach to Electronic Case Reporting (eCR).

E

Electronic Case Reporting (eCR)

The electronic transmission of case reports from providers' electronic health records systems to public health agencies.

Electronic Health Record (EHR)

An electronic version of a patient's medical history, that is maintained by the provider over time, and may include all of the key administrative clinical data relevant to that persons care under a particular provider, including demographics, progress notes, problems, medications, vital signs, past medical history, immunizations, laboratory data and radiology reports.

Electronic Initial Case Report (eICR)

An initial case report made to public health containing sufficient data for public health agencies to initiate investigation or other appropriate public health activities that is automatically initiated by the EHR when patient data is matched against a series of public health reportable condition trigger codes. The eICR conveys core, initial case data to a PHA that may also lead to additional reporting or follow-up intended to confirm reportability, provide condition-specific or public health jurisdiction-specific reporting data, or support public health investigation, contact tracing, and/or countermeasure administration. The eICR serves as input to reportability evaluation to the Reportable Conditions Knowledge Management System (RCKMS) and also allows PHAs to communicate the reportability of a condition back to clinical care personnel.

Electronic Lab Report (ELR)

The electronic transmission of laboratory reports from laboratories to public health or between public health departments which identify reportable conditions. ELR improves the quality of laboratory report data received by public health by providing timely, accurate, complete, and consistent laboratory report information.

Expected Criteria window

The RCKMS application page that displays options for selecting the expected condition criteria to fire on execution of a test case.

External Reference

Information such as text, links to web sites, documents and other modes of information that the public health agency makes available to reporters.

External References tab

The RCKMS application page that displays information such as text, links to web sites, documents and other modes of information that the PHA wants available to reporters.

Extensible Markup Language (XML)

A markup language that defines a set of rules for encoding documents in a format that is both human-readable and machine-readable.

F

G

H

Healthcare Information and Management Systems Society (HIMSS)

A not-for-profit organization dedicated to improving health care in quality, safety, cost-effectiveness, and access through the best use of information technology and management systems. HIMSS was founded in 1961 as the Hospital Management Systems Society and is now headquartered in Chicago, Illinois. The society has more than 50,000 individual members, over 570 corporate members, and more than 225 not-for-profit organizations.

Home page

The RCKMS application page that serves as the landing page for the application following successful sign-in.

I

Initial Case Message

A set of common data elements for all reportable conditions found in an EHR sent to public health when a trigger is present. Used by the Decision Support Service (DSS) to determine if case is reportable and also serves as early notification of case to the public health jurisdiction.

Initial Implementation

The minimum functional components needed to support public health case reporting that are extensible to a production system.

Internal Reference

Information such as text, links to web sites, documents and other modes of information for use by the public health agency.

Internal References tab

The RCKMS application page that displays information such as text, links to web sites, documents and other modes of information for use by the PHA.

J

Jurisdiction

The physical location bounding the public health agency's area of responsibility.

Jurisdiction Administrator

An RCKMS user enabled to view and edit information for the assigned jurisdiction and no other.

Jurisdiction module

The RCKMS application pages displaying detail information about your jurisdiction , including the Public Health Agency, and the status of the supported conditions and reporting specifications, as well as ZIP codes and users.

Jurisdiction page

The RCKMS application page that displays a list of all available jurisdictions.

Jurisdiction window

The RCKMS application page that displays detail information about the Public Health Agency (PHA) and provides options to view the conditions and reporting specifications associated with the PHA, as well as associated ZIP codes and users within the PHA.

K

L

Logic sets

Logical statements expressed in machine-processable language that indicate when a given reporter type should report to public health and what is required of them for reporting. A logic set is translated into rules logic for use in determining reportability. Used in combination with reporting criteria, logic sets follow the "S, N, O" notation used in the CSTE position statements. "S" indicates the criteria by itself qualifies the case for reporting, where "N" indicates necessary and "O" is optional.

M

N

Necessary

As part of the S, N, O notation, Necessary is used in combination with logic sets to indicate that a criterion qualifies the case for reporting. Presence of this criteria with other criteria (either *Necessary* or *Optional*) is

needed to meet the requirement for reporting. For example, three criteria each indicate *Necessary*. If all three criteria are met, then the user must report. If only one or two criteria are met, then the user does not report.

O

Optional

As part of the S, N, O notation, Optional is used in combination with logic sets to indicate that a criterion qualifies the case for reporting. Within a group of Optional criteria, at least one *Optional* criteria is needed. *Optional* criteria must be paired with at least one *Necessary* criteria in order to meet the requirement for reporting. For example, Criteria 1 is *Necessary* and Criteria 2 and 3 are *Optional*. If Criteria 1 is met, AND either Criteria 2 or 3 (or both) is met, then the user must report. If only Criteria 2 and 3 are met, then the user does not report.

P

Position Statements

The narrative descriptions published by CSTE used as the source for the RCKMS default reporting specifications. The CSTE Position Statements' Section 6-A narratives and Table 6-B concerning case reporting are used to determine whether a case should be reported to public health. Position statements employ the "S, N, O" notation to indicate reportability, where "S" indicates the criteria by itself qualifies the case for reporting, where "N" indicates necessary and "O" is optional.

Public Health Agency (PHA)

The governmental body at the local, state, and federal level responsible for delivery of public health services.

Public Health Decision Support

A function that makes public health related determination in a manner similar to what is done by clinical decision support for the clinical setting. For RCKMS, this function is designed to accept an incoming message from a reporter and determine if a case report should be sent to public health.

Q

R

RCKMS Administrator

A RCKMS user enabled to view, edit and delete information for all jurisdictions, as well as perform other application administration tasks.

Reportable Condition Mapping Table (RCMT)

A table of mappings between reportable conditions and their associated LOINC laboratory tests and SNOMED results. The RCMT uses standards suggested for the meaningful use measure "reportable lab result reporting to public health". In previous incarnations the RCMT was known as the "Dwyer tables", "Sable tables" or

Notifiable Condition Mapping Tables (NCMTs). RCMT helps identify incoming Health Level Seven International (HL7) ELR messages for reportable conditions and facilitates the routing of ELR messages to appropriate public health programs. Electronic health records (EHR) and decision support systems use RCMT to help identify patients who may have reportable conditions, triggering public health case reporting and ELR. It also facilitates the mapping of local laboratory test and result codes related to reportable conditions to standard vocabulary codes to support semantic interoperability.

Reportable Conditions Trigger Codes (RCTC)

Codes implemented in the health care system to match against encounter information and initiate an eICR. See [Trigger Codes](#).

Reportability Response (RR)

A message generated by the RCKMS Decision Support Service (DSS) documenting if any condition(s) were found to be reportable, to which jurisdiction(s) reporting is required and additional information, such as contact information of the relevant PHA. See [Decision Support Service](#).

Reporting Criteria

The narrative descriptions determining whether a case should be reported to public health that serve as the source for the RCKMS default reporting specifications. Reporting criteria are based on the CSTE Position Statements' Section 6-A narratives and table 6-B concerning case reporting. In the RCKMS application, each criterion is tied to logic that is supported by the value sets. These are represented by means of criteria templates that provide pre-populated options used to create jurisdiction specific criteria.

Reference window

The RCKMS application page that displays the details of the selected reference item, including name, URL, priority and category. You use the Reference window to add and edit reference information.

Reports module

The RCKMS application pages that provide a printable report or electronic file that contains the reporting specifications that were entered through the authoring interface.

Reports page

The RCKMS application page that displays options for entering queries and viewing report output.

Reportable Conditions Management System (RCKMS)

A tool developed to enhance surveillance by providing comprehensive information to clinicians, labs and reporters about the “who, what, where, when, why and how” of case reporting with the aim of delivering information from providers on potential cases to state and local public health as a service of the broader infrastructure for electronic case reporting. The RCKMS application has two main parts, the authoring interface and a Decision Support Service. The authoring interface is the portal where information about reporting

criteria gets entered, stored, and processed. The second part of the tool is a Decision Support Service that providers can query to determine if the case should be reported and if so to where. It is linked to a provider's EHR system and after the patient visits the provider, the encounter information is recorded in the EHR. If the EHR detects information that suggests a suspected case, the EHR will call RCKMS decision support, which will then provide the determination of reportability.

Reporting Specification

The criteria, value sets and logic sets representing each of the conditions pre-populated in the RCKMS tool based on the CSTE Position Statements narratives six A and tables six B and any jurisdiction-specific criteria. Reporting criteria describe the details of reporting a condition to a jurisdiction and include all criteria, value sets, logic sets and rules logic that specify when a reportability response is sent.

Reporting Specifications module

The RCKMS application pages that provide options for managing the set of reporting specifications for the conditions supported in a jurisdiction. The Reporting Specification module enables you to search and display reporting specifications for the available conditions, add and edit reporting specifications, view and edit basic information about the reporting specification, add and edit reporting criteria and logic sets, add reporting timeframe information and indicate criteria are Sufficient, Necessary or Optional, add and edit supporting text, links to web sites and other documents, delete reporting specification, save changes to reporting specifications, and deploy reporting specifications.

Reporting Specification page

The RCKMS application page that displays all conditions identified as reportable by the public health agency and provides options for searching and displaying reporting specifications, adding a new reporting specification, editing an existing reporting specification, or deleting a reporting specification.

Rules Logic

Interpretation of reporting criteria into computable rules to be used in a decision support tool.

S

S, N, O Notation

Used in combination with reporting criteria, S, N, O notation is used with logic sets to express whether a criterion is Sufficient, Necessary, or Optional to qualify the case for reporting. Sufficient means that the

criterion alone makes this reportable to the PHA. Necessary and Optional work together, with all Necessary criteria in addition to at least one Optional criteria required for reporting.

Specifications tab

The RCKMS application page that displays the criteria and logic sets rendered as a grid. It also displays options indicating the reporting timeframe and reporting rules options to indicate if the criteria are Sufficient, Necessary or Optional for reporting.

Sufficient

As part of the S, N, O notation, Sufficient is used in combination with logic sets to indicate that a criterion qualifies the case for reporting. Presence of this criteria alone indicates sufficient requirement for reporting. For example, three criteria each indicate *Sufficient*. If any one of the three criteria is met, then the user must report.

Summary Report

The RCKMS application page that displays summary output of the reporting specification for the condition you select, along with instructions on how to read the reporting specifications and an explanation of the Sufficient, Necessary and Optional reporting rules. The Summary Report provides a high-level overview of the reporting specifications. It describes the data entered into the reporting specifications table through the authoring tool's Reporting Specification module. The report includes how logics sets are related to a condition's criteria through the Sufficient, Necessary, Optional rules. The last page of the report provides instructions on how to read the Reporting Specifications and provides definitions of the Sufficient, Necessary, and Optional rules.

T

Test Case

An RCKMS application routine used to test the logic set and rules for the reporting criteria associated with the selected reporter type. A test case confirms the criteria as Sufficient, Necessary and Optional based on rules for the selected reporter type as displayed in the *Specifications* tab. When you run a test case, the application simulates receipt of a report and moves that information through the logic chain defined for the reporting specification's criteria, logic sets and rules options. A successful test case provides confirmation that the criteria and rules for a given reporter provide the expected results.

Test Case module

The RCKMS application pages used to manage test case information and view test results. The Test Cases options confirm the criteria as Sufficient, Necessary and Optional based on rules for the selected reporter type as displayed in the Specifications tab. You can add new test cases and edit existing test cases.

Test Cases page

The RCKMS application page that displays a grid with the available test cases for the reporting specification.

(Test Case) Details tab

The RCKMS application page that displays detail information on the test case, including the reporting specification, the test case name and reporter type, as well as options for expected reportability and skipping test execution.

Test Inputs tab

The RCKMS application page that displays options for indicating reportability, test source and criteria detail information. The Test Inputs tab enables you to specify the input source for the test case as either criteria or file-based. Depending on your selection, you can either add the appropriate inputs from a criteria template or upload a file from your computer containing the same information. You can also enter the criteria expected to fire on execution of the test case.

Test Case Input window

The RCKMS application page that displays the options for adding and editing reporting criteria information to be tested. You can add test case input information or edit existing information.

Test Results page

The RCKMS application page that displays a summary of the results and options to display the test case details, including options for viewing and downloading XML representations of the test input and results output data. The Test Results page displays a summary of result information at the top of the page, followed by details on Jurisdiction Information, Test Subject and Inputs, Logs and Messages, and Links and References information. It also provides options for viewing and downloading the input and output XML files structuring the input and output data.

Test Subject tab

The RCKMS application page that displays the test subject's gender and test type information, along with options for specifying offset and date-based testing. The selected criteria template information displays at the top of the page, followed by the criteria label. And at the bottom of the page, you can choose the criteria inputs associated with the criteria template and make changes to the available predicate information.

Trigger Codes

Codes (LOINC, SNOMED, RXNorm, ICD-9/ICD-10) that when present in an EHR initiate the sending of an initial case message to public health. See [Codes](#); [Value Set](#).

U

V

Value Set

The numerical values (codes) and human-readable names (terms) drawn from standard vocabularies such as SNOMED CT , RxNorm, LOINC and ICD-10-CM which are used to define concepts used in clinical quality measures (e.g., patients with diabetes, clinical visit). (see <https://vsac.nlm.nih.gov/>)

Virtual Medical Record (vMR)

A simplified, standardised electronic health record data model sponsored by HL7 and designed to support interfacing to clinical decision support (CDS) systems. vMR is compatible with Service-oriented Architecture (SOA) of CDS.

W

X

XML

See [Extensible Markup Language](#).

Y

Z

Blank Page

Index

- About RCKMS icon, 8
- Account icon, 8
- Add
 - Internal References, 26
 - Logic Set, 19
 - Reporting Specification, 14
 - Specifications, 24
 - Test Cases, 37
- Add External Reference button, 30
- Add Internal Reference button, 27
- Add Jurisdiction button, 55
- Add New Reference window, 28
- Add Test Case Inputs button, 44
- AIMS, 6
- Browse button, 43
- Category. *See* Reference window
- Close button, 19, 21, 24, 26, 27, 28, 30, 31, 41, 42, 44, 45, 46, 48, 56
- Criteria
 - Add, 23
 - Delete, 22, 23
 - Edit, 23
 - Predicates, 24, 45
- Criteria and Logic Sets tab
 - Criteria section, 22
 - Inactivate, 23
 - Label, 22
 - Logic Sets section, 20
 - Name, 20
 - Reporter Type, 20
 - Type, 23
- Criteria window
 - Criteria Input, 24
 - Criteria Label, 24
 - Criteria Template, 24
 - ID, 23
 - Inactivate, 24
- Decision Support Service, 5, 6, 14, 32
- Delete icon, 13, 20, 23, 27, 30, 40, 44, 54
- Deploy. *See* Reporting Specification
 - Reporting Specifications, 32
- Detailed Report, 51
- Details tab
 - Assigned To, 18
 - Care provided in this jurisdiction?, 19
 - Category, 18
 - Condition Expected to be Reportable, 41
 - Description, 18, 41
 - Edit, 15
 - End Date, 18
 - Laboratory required to submit a specimen, 19
 - Last Updated, 18
 - Name, 18, 41
 - NNC Code, 18
 - Patient resident of this jurisdiction?, 19
 - Performing lab located in this Jurisdiction?, 19
 - Reporter Type, 41
 - Reporting Specification, 41
 - Skip this test, 41
 - Start Date, 18
 - Status, 18
 - Test Case, 41
- DSS. *See* Decision Support Service
- Edit
 - Internal References, 26
 - Logic Set, 19
 - Specifications, 24
 - Test Cases, 37
- Edit icon, 13, 20, 23, 27, 30, 40, 44, 54
- Edit Reference window, 28, 31
- EHR, 5
- eICR, 39, 40, 43, 53, 55
- Electronic Health Record. *See* EHR
- Expected Criteria table
 - Label, 44
- Expected Criteria window
 - Criteria Template, 46
- External References
 - Add, 29
 - Delete, 30
 - Edit, 29
- External References tab
 - Description, 30
 - Excerpt, 30
 - Name, 30
 - URL, 30
- Home icon, 8
- Home page, 8
- Internal References
 - Add, 26

- Delete, 27
- Edit, 26
- Internal References tab
 - Description, 27
 - Excerpt, 27
 - Name, 27
 - URL, 27
- Introduction to RCKMS, 5
- Jurisdiction module, 53
- Jurisdiction page, 54
 - Administrators, 54
 - Last Update, 54
 - PHA Name, 54
 - PHA Type, 54
 - Show Entries, 54
 - State, 54
- Jurisdiction window
 - Conditions tab, 55
 - Public Health Agency Details tab, 55
 - Users tab, 56
 - Zip Codes tab, 56
- Landing page. *See* Home page
- Logic Set
 - Add, 21
 - Delete, 20
 - Edit, 21
- Logic Set window, 21
 - Description, 21
 - Logic Set Name, 21
 - Reporter Type, 21
- Login. *See* Sign-in
- Logout. *See* Sign-out
- Main menu, 8
- Menu bar, 8
- Necessary, 24
- New Criteria button, 23
- New Expected Criteria button, 44
- New Logic Set button, 20
- New Reference window, 31
- Next, 14, 20, 23, 27, 30, 40, 54
- Optional, 24
- Previous, 14, 20, 23, 27, 30, 40, 54
- Priority. *See* Reference window
- Public Health Agency, 53
- Queries and Report Output. *See* Reports page
- Reference window
 - Add, 28
 - Description, 28, 31
 - Edit, 28
 - Excerpt, 28, 31
 - Name, 28, 31
 - URL, 28, 31
 - URL Category, 28, 31
 - URL Priority, 28, 31
- References
 - External, 29
 - Internal, 26
- Reportability Response, 6, 14, 29, 31, 53, 55
- Reporting Rules, 24, 50, 51
- Reporting Specification
 - Add, 11, 13, 14, 19
 - Delete, 13, 17
 - Deploy, 14, 32
 - Edit, 11, 13
 - Save, 31
 - Search, 12
- Reporting Specification page
 - Assigned To, 13
 - Category, 13
 - Condition Name, 13
 - Created By, 13
 - Last Updated, 13
 - Nationally Notifiable?, 13
 - Reportable Conditions table, 13
 - Search text box, 13
- Reporting Specifications
 - Deploy, 32
- Reporting Specifications drop-down list, 40
- Reporting Timeframe, 24
- Reports page
 - Condition, 50
 - Jurisdiction, 50
 - Jurisdiction Scope, 50
 - Report, 50
 - Status, 50
- RR. *See* Reportability Response
- Run
 - Test Cases, 37
- Run Report button, 50
- Run Test button, 40, 41, 42, 44
- Save Condition Reference button, 28, 31
- Save Criteria button, 24
- Save Expected Criteria button, 46
- Save Jurisdiction button, 56
- Save Logic Set button, 21
- Save Reporting Specification button, 19, 23, 26, 30
- Save Test Case button, 41, 42, 44
- Save Test Case Input button, 45

- Show entries, 13, 22, 27, 30, 40
- Show Entries, 20
- Sign-in, 7
- Specifications tab
 - Criteria, 26
 - Logic Sets, 26
 - Reporting Rules, 26
 - Reporting Timeframe, 26
- Status, 13
- Sufficient, 24
- Summary Report, 50
- System menu, 8
- Test Case Input window, 45
 - Criteria Input, 45
 - Criteria Label, 45
 - Criteria Template, 45
 - ID, 45
- Test Case Inputs table
 - Criteria Type, 44
 - Label, 44
 - Method, 44
- Test Case Results, 46
- Test Cases
 - Add, 37, 40
 - Edit, 37
 - Reporting Criteria, 37
 - Run, 37
 - View, 37
- Test Cases page
 - Name, 40
 - Payload Type, 40
- Test Inputs tab
 - Criteria, 43
 - Expected Criteria, 44
- File, 43
- Payload Type, 43
- Test Case, 43
- Test Case Inputs, 44
- Test Results page
 - Actual Criteria Met, 48
 - Actual Reportable, 47
 - Actual Reportable Condition, 48
 - Duration, 48
 - Expected Criteria Met, 48
 - Expected Reportable, 47
 - Expected Reportable Condition, 47
 - Input XML, 48
 - Jurisdiction Information, 48
 - Links and References, 48
 - Logs and Messages, 48
 - Output XML, 48
 - Reporter Type, 47
 - Test Inputs, 48
 - Test Result, 47
 - Test Subject, 48
- Test Subject tab
 - Age at Execution, 42
 - Age Offset, 42
 - Date of Birth, 42
 - Date-based, 42
 - Execution Date, 42
 - Gender, 42
 - Offset Based, 42
 - Test Case, 42
- URL Category, 29
- URL Priority, 29, 31
- vMR, 39, 40, 43, 48
- Zip codes, 53