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

Version 1.4
July 18, 2019
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<th>Approval Date</th>
<th>Reason</th>
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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 potential 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 provided to you by the RCKMS administrator. The URL for the RCKMS training and demonstration instance is https://demo-rckms.hlnc.org/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. You can use the RCKMS Feedback Form found on the footer of the RCKMS tool or on RCKMS website (RCKMS.org) to send comments to the RCKMS team, report an issue, or request further assistance. The form can be accessed directly here: https://redcap.vanderbilt.edu/surveys/?s=NAN8HMNAEC

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.
Enter your user name and password and click **Sign-in**. RCKMS displays the Password Reset page.

*Note: The Password Reset page will only be displayed the first time you sign in.*
Enter your username, current password and new password. The new password must be eight characters, including upper and lowercase letters, numbers, and special characters. Click **Update**.

The **Home page** displays.

If you ever forget your password, click the **Forgot Password?** link at the bottom corner of the Sign In page.

Enter your username and click **Send**. RCKMS will send an email with instructions to reset your password.
1.1.1 Home page

The Home page serves as the landing page for the application following successful sign-in. Any notifications sent from the RCKMS administrator will be displayed here.

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.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Menu bar</td>
<td>Displays options for accessing the RCKMS modules.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Item</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Main Menu</td>
<td>Click to display the options for Jurisdiction Administrator tasks.</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 About page and general information on the RCKMS application.</td>
</tr>
<tr>
<td>Account</td>
<td>Click to display information about the current session, user profile editor, change password, view the jurisdiction inbox, and to sign-out of the application.</td>
</tr>
<tr>
<td>Overview</td>
<td>Header for side navigation menu options.</td>
</tr>
<tr>
<td>Reporting Specifications</td>
<td>Click to display the Reporting Specification page.</td>
</tr>
<tr>
<td>Test Cases</td>
<td>Click to display the Test Cases page.</td>
</tr>
<tr>
<td>Reports</td>
<td>Click to display the Reports page.</td>
</tr>
</tbody>
</table>

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.
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 2.4, 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 2.5, Adding and Editing Logic Set Information and Section 2.6, 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 2.7, 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 2.8, 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 2.9, Adding and Editing External Reference Information.
- Delete an existing reporting specification. To delete a reporting specification, refer to Section 2.4.1, Deleting Reporting Specifications.
- Save changes to reporting specifications. To save a reporting specification, refer to Section 2.10, Saving Changes to the Reporting Specification.
- Publish reporting specifications. To publish a reporting specification, refer to Section 2.11, Publishing 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:

1. Do one of the following:
   - Click Reporting Specifications in the left navigation menu on the Home page. The Reporting Specification page displays all conditions identified as reportable by your 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.

2. Click Search and type the text you want. The search results display in the table. You can also clear any existing text in the Search text box to reset the search results and run your search again.

From here you can add a new reporting specification, clone a 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 clone a reporting specification, refer to section 2.3, Cloning Reporting Specifications.
- To edit an existing reporting specification, refer to Section 2.4, Editing Details Information.
- To delete a reporting specification, refer to Section 2.4.1, Deleting Reporting Specifications.
2.1.1 Reporting Specification page

The *Reporting Specification* page displays all conditions imported by your PHA.

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 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.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show entries</td>
<td>Click drop-down and choose the number of items to display in the grid.</td>
</tr>
<tr>
<td>Search</td>
<td>Type the text you want and the search results display in the table. Clear existing text to reset the search results.</td>
</tr>
</tbody>
</table>
### Reportable Conditions table

The Reportable Conditions table includes the following columns.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specification Added?</td>
<td>Indicates if the reporting specification logic sets and criteria have been added for the condition.</td>
</tr>
<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>Version</td>
<td>The version 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: Condition Details Only, 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>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>
<tr>
<td>Clone Specification</td>
<td>Click to clone the selected item.</td>
</tr>
</tbody>
</table>

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

**Add Reporting Specification**

Click to display the **Details** tab on the *New Reporting Specification* page and add a reporting specification.

**Publish Reporting Specification**

Click to publish the reporting specification and make it “live” and available to engage provider data and decision support logic for delivery of Reportability Responses. You can publish 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 or import a new, default copy of a previously imported reporting specification to your existing list.

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 Reporting Specification** pane.

3. Click the “**Display reporting specifications previously imported**” checkbox.

4. Click **Reporting Specification** and choose the reporting specification that you want. All reporting specifications, including those that have already been imported, populate.

5. In the **Assign a Version** field, type the version number of the condition. The version number must be unique.

6. Click **Save Reporting Specification** and the Edit Reporting Specification page will display.

7. **Name** is populated during the import process.

8. **Condition Code** is populated during the import process.

9. **Category** is populated during the import process.

10. **NNC Code** is populated during the import process and the Nationally Notifiable Event Code displays if applicable.

11. Click **Description** and type the description you want.

12. 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. This means that if the Facility address in the eICR matches your public health agency’s jurisdiction, and your rules are met then you will receive the report.

   • Click **Lab is located in this jurisdiction** to receive reports for events where laboratory testing is performed in your jurisdiction. This is currently not implemented as the laboratory address is not included in the eICR so this determination cannot be made at this time.

   • Click **Patient is a resident of this jurisdiction** to receive reports for events where the patient resides in your jurisdiction. This means that if the Patient address in the eICR matches your public health agency’s jurisdiction, and your rules are met then you will receive the report.

When an eICR is received, an address is matched by first:

• Checking the eICR to see if the zip code in the patient address field or the facility address field matches a zip codes associated with a public health agency in RCKMS. If one is found it runs that public health agency’s rules. If more than one public health agency have the same zip code associated then rules for all public health agencies that are found will be run. If the zip code does not match, then the eICR will be checked for the State code.

• If the State code in the patient address field or the facility address field matches the state code associated with a public health agency in RCKMS, then that public health agency’s rules will be run.

13. 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.

14. Click **Version** and type the version number you want. The version number should following whatever naming convention you define to track changes to your reporting specifications.
15. Click **Start Date** and type the date you want. Note that the **Start Date** must be greater than the date the condition is published.

16. Click **End Date** and type the date you want.

17. Click **Assigned To** and choose the option you want.

18. Click **Responsible Agency** and choose the Public Health Agency that you want. It defaults to your Jurisdiction. Responsible Agency is the Public Health Agency to which reporting is *legally required* based on the patient’s residence or where care was delivered. The Responsible Agency is included in the Reportability Response.

19. Click **Laboratory Required to Submit a Specimen** to indicate the laboratory is required to submit specimen information. Currently, this feature is purely informational. When selected, an External Reference should be included to link reporters on specimen submission instructions for their laboratories. The reference will be included in the Reportability Response.

20. 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 2.5, *Adding and Editing Logic Set Information* and Section 2.6, *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 2.7, *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 2.8, *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 2.9, *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 2.4, *Editing Details Information*.

21. 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 Cloning Reporting Specifications

You can create a new version of an existing reporting specification.
You can click the **Clone** button ⬇️ to create a new version of an existing reporting specification. This clone will be an exact copy of the reporting specification that you have previously authored.

Perform the following steps:

1. Click the **Clone** button next to the reporting specification that you would like to clone. A pop-up window will appear.
2. **Reporting Specification** was populated during the cloning process and is not editable. It consists of the name of the reporting specification and the version number.
3. The **Assign a Version** field is editable and can be changed to adhere to the naming convention defined by your jurisdiction to track new versions of reporting specifications. Each version number for a reporting specification must be unique.
4. Click **Clone Reporting Specification**. The new copy of the Reporting Specification will be saved to your condition list.

*Note: Only one version of a given reporting specification can be published to production at a time. Previous versions will be automatically retired when a new version is published to production.*

### 2.4 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. If there is more than one NNC code, all codes will be listed.
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 the patient received care in your jurisdiction.
   - Click **Lab is located in this jurisdiction** to receive reports for events where the laboratory conducting testing is located 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 where the reporting specification is in the 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 **Version** and type the version number you want.

11. Click **Start Date** and type the date you want. Note that the **Start Date** must be greater than the date the condition is published.

12. Click **End Date** and type the date you want.

13. Click **Assigned To** and choose the option you want.

14. Click **Responsible Agency** and choose the Public Health Agency that you want. Responsible Agency is the Public Health Agency to which reporting is **legally required** based on the patient’s residence or where care was delivered. The Responsible Agency will be included on the Reportability Response after the rules are run. If the jurisdiction selects “Local Agency” as the Responsible Agency, this indicates that reporting to the Local Agency is required to meet legal mandates for reporting. RCKMS will include “Local Agency” in the Reportability Response, but derivation of the Local Agency is outside the scope of the RCKMS tool.

15. Click **Laboratory Required to Submit a Specimen** to indicate the laboratory is required to submit specimen information. When selected, an External Reference should be included to instruct reporters on specimen submission details. The reference will be included in the Reportability Response.

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 2.5, Adding and Editing Logic Set Information** and **Section 2.6, 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 2.7, 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 2.8, 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 2.9, 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 2.4, 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.

### 2.4.1 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.

### 2.4.2 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.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The descriptive name of the condition.</td>
</tr>
<tr>
<td>Condition Code</td>
<td>The SNOMED code and name pertaining to the condition.</td>
</tr>
<tr>
<td>Category</td>
<td>The disease category organizing the condition. Options include Bloodborne,</td>
</tr>
<tr>
<td></td>
<td>Enteric, Vaccine-Preventable Conditions and Zoonotic and Vectorborne</td>
</tr>
<tr>
<td></td>
<td>Diseases, among others.</td>
</tr>
<tr>
<td>NNC Code</td>
<td>The nationally notifiable event code associated with the condition. This is</td>
</tr>
<tr>
<td></td>
<td>only applicable if the condition is nationally notifiable.</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the reporting specification for the selected condition.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the reporting specification for the selected condition. Options</td>
</tr>
<tr>
<td></td>
<td>include: Conditions Details Only, In Progress, Assigned for Review, Ready for</td>
</tr>
<tr>
<td></td>
<td>Test, Published to Test, Retired from Test, Ready for Production Use,</td>
</tr>
<tr>
<td></td>
<td>Published to Production, and Retired from Production</td>
</tr>
<tr>
<td>Version</td>
<td>The version number assigned to the reporting specification.</td>
</tr>
<tr>
<td>Start Date</td>
<td>The start date on which the reporting specification for the selected condition</td>
</tr>
<tr>
<td></td>
<td>is in effect. Click the Calendar button to display a calendar and choose the</td>
</tr>
<tr>
<td></td>
<td>date you want.</td>
</tr>
<tr>
<td>End Date</td>
<td>The end date on which the reporting specification for the selected condition</td>
</tr>
<tr>
<td></td>
<td>is in effect. Click the Calendar button to display a calendar and choose the</td>
</tr>
<tr>
<td></td>
<td>date you want.</td>
</tr>
<tr>
<td>Assigned To</td>
<td>The administrator to whom the reporting specification for the selected</td>
</tr>
<tr>
<td></td>
<td>condition is assigned for review.</td>
</tr>
<tr>
<td>Responsible Agency</td>
<td>Responsible Agency is the Public Health Agency to which reporting is</td>
</tr>
<tr>
<td></td>
<td>legally required based on the patient’s residence or where care was delivered.</td>
</tr>
<tr>
<td>Last Updated</td>
<td>Date of last save.</td>
</tr>
<tr>
<td>Created By</td>
<td>User name of reporting specification creator.</td>
</tr>
<tr>
<td>Care provided in</td>
<td>Click to receive report for events where care is provided in your</td>
</tr>
<tr>
<td>this jurisdiction?</td>
<td>jurisdiction.</td>
</tr>
<tr>
<td>Lab is located in</td>
<td>Click to receive report for events where laboratory testing is performed in</td>
</tr>
<tr>
<td>this Jurisdiction?</td>
<td>your jurisdiction.</td>
</tr>
<tr>
<td>Patient resident of</td>
<td>Click to receive report for events where the patient resides in your</td>
</tr>
<tr>
<td>this jurisdiction?</td>
<td>jurisdiction.</td>
</tr>
<tr>
<td>Laboratory required</td>
<td>Click to indicate the laboratory is required to submit a specimen.</td>
</tr>
<tr>
<td>to submit a specimen</td>
<td></td>
</tr>
<tr>
<td>Save Reporting</td>
<td>Click to save the reporting specification and display the previous page.</td>
</tr>
<tr>
<td>Specification</td>
<td></td>
</tr>
<tr>
<td>Apply</td>
<td>Click to save your changes and keep the window open.</td>
</tr>
<tr>
<td>Close</td>
<td>Click to close and display the previous page.</td>
</tr>
</tbody>
</table>

### 2.5 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 2.7, Adding and Editing Specification Information. For more detail on reporting criteria, refer to Section 2.6, 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 2.7, Adding and Editing Specification Information.
2.5.1 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.

![Image of Reporting Specification page showing Logic Sets section](image)

The following table details the options on the page.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show entries</td>
<td>Click drop-down and choose the number of items to display in the grid.</td>
</tr>
<tr>
<td>Name</td>
<td>The logic set name.</td>
</tr>
<tr>
<td>Reporter Type</td>
<td>The reporter type associated with the logic set.</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>Previous</td>
<td>Click to navigate back through the list of items available.</td>
</tr>
<tr>
<td>Next</td>
<td>Click to navigate forward through the list of items available.</td>
</tr>
<tr>
<td>New Logic Set</td>
<td>Click to add a new logic set and display the New Logic Set window.</td>
</tr>
</tbody>
</table>

Click the Sort icon at the top of each column to sort the information.
2.5.2 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.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logic Set Name</td>
<td>The logic set name.</td>
</tr>
<tr>
<td>Reporter Type</td>
<td>The reporter type associated with the logic set. Options include Lab Reporting, Provider/Facility Reporting, and Vital Records. Lab Reporting focuses on information received from stand-alone labs (ex. Quest, LabCorp etc.). Provider/Facility Lab Reporting refers to information received from lab tests or results from hospitals or doctor’s offices. Currently, Lab Reporting is not functional in RCKMS. Because RCKMS is not receiving information from these labs, the data entered under this Reporter Type will not trigger a case to be reportable. This is planned for a future release. Provider/Facility Lab Reporting, however, is functional. RCKMS will receive information from Provider/Facility Labs and will run the rules authored under this Reporter Type to determine if a case is reportable to your jurisdiction.</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the logic set.</td>
</tr>
<tr>
<td>Save Logic Set</td>
<td>Click to save the logic set.</td>
</tr>
<tr>
<td>Apply</td>
<td>Click to save your changes and keep the window open.</td>
</tr>
<tr>
<td>Cancel/Close</td>
<td>Click to cancel your changes, or close if you have not made any changes and display the previous page.</td>
</tr>
</tbody>
</table>

2.6 Adding and Editing Criteria Information

You can activate and inactivate 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 activate and inactivate 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 2.5, Adding and Editing Logic Set Information.

Note that if there is a criterion that your jurisdiction would like to add to a particular condition, that request should be submitted via the Feedback Form in the footer of RCKMS.

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. 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.
3. 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.

As you activate and inactivate 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 2.7, Adding and Editing Specification Information.

2.6.1 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.
The following table details the options on the page.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show entries</td>
<td>Click drop-down and choose the number of items to display in the grid.</td>
</tr>
<tr>
<td>Label</td>
<td>The criteria label.</td>
</tr>
<tr>
<td>Type</td>
<td>The criteria type. Options include Laboratory, Clinical, Epidemiologic and Demographic.</td>
</tr>
<tr>
<td>Inactivate</td>
<td>Indicates if the criteria is active or inactive.</td>
</tr>
<tr>
<td>Edit</td>
<td>Click to edit the selected item.</td>
</tr>
<tr>
<td>Previous</td>
<td>Click to navigate back through the list of items available.</td>
</tr>
<tr>
<td>Next</td>
<td>Click to navigate forward through the list of items available.</td>
</tr>
<tr>
<td>Save Reporting Specification</td>
<td>Click to save the reporting specification.</td>
</tr>
<tr>
<td>Apply</td>
<td>Click to save your changes and keep the window open.</td>
</tr>
<tr>
<td>Cancel/Close</td>
<td>Click to cancel your changes, or close if you have not made any changes and display the previous page.</td>
</tr>
</tbody>
</table>

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

2.6.2 Criteria window

The Criteria window displays the options for activating and inactivating reporting criteria information.
### 2.7 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:

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sufficient</td>
<td>Presence of this criteria alone indicates sufficient requirement for reporting. For example, three criteria each indicate <em>Sufficient</em>. If any one of the three criteria is met, then the user must report.</td>
</tr>
<tr>
<td>Necessary</td>
<td>Presence of this criteria with other criteria (either <em>Necessary</em> or <em>Optional</em>) is needed to meet the requirement for reporting. For example, three criteria each indicate <em>Necessary</em>. 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.</td>
</tr>
<tr>
<td>Optional</td>
<td>Within a group of Optional criteria, at least one <em>Optional</em> criterion is needed. <em>Optional</em> criteria must be paired with at least one <em>Necessary</em> criteria in order to meet the requirement for reporting. For example, Criteria 1 is <em>Necessary</em> and Criteria 2 and 3 are <em>Optional</em>. 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.</td>
</tr>
</tbody>
</table>

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*.

### 2.7.1 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.

![Specifications tab](image)

The following table details the options on the page.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criteria</td>
<td>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.</td>
</tr>
<tr>
<td>Logic Sets</td>
<td>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.</td>
</tr>
<tr>
<td>Reporting Timeframe</td>
<td>The time required for reporting. Click the <em>number</em> text box and type or choose the number you want for the logic set you want. Click the <em>unit</em> 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.</td>
</tr>
<tr>
<td>Reporting Rules</td>
<td>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.</td>
</tr>
</tbody>
</table>
### 2.8 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 **Priority** and choose the option you want.
6. Click **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.

#### 2.8.1 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 following table details the options on the page.

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

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, URL, priority and category. You use the Reference window to add and edit reference information.

The following table details the options on the page.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the reference.</td>
</tr>
<tr>
<td>URL</td>
<td>The URL for the reference.</td>
</tr>
<tr>
<td>Priority</td>
<td>The priority of the internal reference. Options include Immediate Action</td>
</tr>
<tr>
<td></td>
<td>Required, Immediate Action Requested, Action Requested, Action Requested,</td>
</tr>
<tr>
<td></td>
<td>Information Only.</td>
</tr>
<tr>
<td>Category</td>
<td>The category of the reference. Options include Outbreak or Cluster Related,</td>
</tr>
<tr>
<td></td>
<td>Additional Reporting Needs, Additional Detection and/or Laboratory Testing</td>
</tr>
<tr>
<td></td>
<td>Needs, Treatment and/or Prevention, PHA Contact Information, Additional</td>
</tr>
<tr>
<td></td>
<td>Resources.</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the reference.</td>
</tr>
<tr>
<td>Excerpt</td>
<td>An excerpt from the reference.</td>
</tr>
<tr>
<td>Add Reference Files</td>
<td>The fields related to an internal reference file.</td>
</tr>
<tr>
<td>File Name</td>
<td>The name of the reference file attached.</td>
</tr>
<tr>
<td>File Type</td>
<td>The format of the reference file attached.</td>
</tr>
<tr>
<td>Download</td>
<td>The arrow icon can be clicked to download the attached reference file.</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>Item</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Add Reference File</td>
<td>The button used to add additional internal reference files.</td>
</tr>
<tr>
<td>Save Condition Reference</td>
<td>Click to save the reference information.</td>
</tr>
<tr>
<td>Apply</td>
<td>Click to save your changes and keep the window open.</td>
</tr>
<tr>
<td>Cancel/Close</td>
<td>Click to cancel your changes, or close if you have not made any changes and display the previous page.</td>
</tr>
</tbody>
</table>

2.9 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 Category options.

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 Priority and choose the option you want.
6. Click Category and choose the option you want. Note that the Category option orders the display of reference information on the Reportability Response.
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.*
2.9.1 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.

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

Click the Sort icon at the top of each column to sort the information.
### 2.9.2 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.

![Reference window example](image)

The following table details the options on the page.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the reference.</td>
</tr>
<tr>
<td>URL</td>
<td>The URL for the reference.</td>
</tr>
<tr>
<td>Priority</td>
<td>The priority of the URL for the reference. Options include Immediate Action Required, Immediate Action Requested, Action Required, Action Requested, Information Only.</td>
</tr>
<tr>
<td>Category</td>
<td>The category organizing the reference. Options include Outbreak or Cluster Related, Additional Reporting Needs, Additional Detection and/or Laboratory Reporting Needs, Treatment and/or Prevention, PHA Contact Information, and Additional Resources. The <em>Category</em> option orders the display of reference information in the Reportability Response.</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the reference.</td>
</tr>
<tr>
<td>Excerpt</td>
<td>An excerpt from the reference. Excerpts are not included in the Reportability Response.</td>
</tr>
<tr>
<td>Save Condition Reference</td>
<td>Click to save the reference information.</td>
</tr>
<tr>
<td>Apply</td>
<td>Click to save your changes and keep the window open.</td>
</tr>
<tr>
<td>Cancel/Close</td>
<td>Click to cancel your changes, or close if you have not made any changes and display the previous page.</td>
</tr>
</tbody>
</table>

### 2.10 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.*

### 2.11 Publishing the Reporting Specification

Once you finalize and save your work on the reporting specification, you must publish 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. The Test mode can be used for users to run tests against their authored rules and to ensure that test cases are returning the expected results before publishing to Production.

#### 2.11.1 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 2.5, Adding and Editing Logic Set Information and Section 2.6, 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 2.7, 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 2.8, 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 2.9, 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 2.4, 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 to designate a user from your jurisdiction to 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 **Publish Reporting Specifications** button. RCKMS prompts you to confirm the publishing.

   There will be 3 sections on this confirmation:
   
   a. Reporting Specifications to be Re-published
   b. Reporting Specifications Ready to be Published
   c. Reporting Specifications to be Retired

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

   ![Reporting Specification Publishing Confirmation](image)

   ![Confirm Publishing Button](image)

7. Click the **Test** radio button. Please review all 3 sections to confirm the reporting specifications that will be Re-published, Published, and Retired. Note: Any specification in a “Published” status will also be “Republished” during the Publishing process to Test unless there is a new version of a specification that is already published to Test.
8. Click the **Confirm Publishing** button to publish all listed reporting specifications.

9. **Publishing Results** page displays.

10. Click **Close** to exit Publishing Results page.

### 2.11.2 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 2.5, *Adding and Editing Logic Set Information* and Section 2.6, *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 2.7, *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 2.8, *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 2.9, *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 2.4, *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 **Publish Reporting Specifications** button. RCKMS prompts you to confirm the publishing. There will be 3 sections on this confirmation:
   a. Reporting Specifications to be Re-published
   b. Reporting Specifications Ready to be Published
   c. Reporting Specifications to be Retired

   **Note:** *Reporting Specifications Ready to be Published* 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 Re-published, Published and Retired. Note: Any specification in a “Published” status that may have been modified will be “Republished” with the new changes during the Publishing process.
8. Click the **Confirm Publishing** button to publish all listed reporting specifications.
9. **Publishing Results** page displays.
10. Click **Close** to exit Publishing Results page.

Once you save and publish 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 4, Running Test Cases and Viewing Results*. To enter queries and generate report output, refer to *Section 0*. 
Shared Service Submission Tool

Similar to the file testing capability in the Test Case Manager tool, the Shared Service Submission Tool allows you to test reporting specifications with an input file. When you run the Shared Service Submission Tool, 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 as determined by the routing information in the uploaded test file. A successful test case provides you confirmation that the criteria and rules for a given reporter provide the expected results. Importantly, when a test case file is run using the Shared Service Submissions Tool, it assesses the address information in the file to determine the jurisdiction whose rules should be run. The zip code section under the Edit Jurisdictions provides additional detail on how the match between eICR address fields, and the zip codes associated with a jurisdiction are used to determine the jurisdictional rules to be run.

You use the Shared Service Submission Tool to confirm the criteria as Sufficient, Necessary, and Optional based on rules for the applicable 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 applicable reporter type. You can run the test cases to account for any jurisdiction-specific information contained in the uploaded file. The Shared Service tool:

- Matches the Patient address zip code in the eICR to zip codes associated with PHAs in RCKMS. If a match is found that jurisdiction’s rules are run. If no match is found the Patent address state code is used to do the match.
- Matches the Facility address zip code in the eICR to zip codes associated with PHAs in RCKMS. If a match is found that jurisdiction’s rules are run. If no match is found the Facility address state code is used to do the match.
- If a condition is identified when the jurisdiction’s rules are run then the SST checks the Specifications Apply When settings associated with the Reporting Specification for the condition.
  - If the patient’s address was in the jurisdiction and Specifications Apply When setting was to report if the Patient is a Resident of the Jurisdiction, then the report would be sent to the jurisdiction.
  - If the facility address was in the jurisdiction and the Specifications Apply When setting was to report if Care was Provided in the Jurisdiction, then the report would be sent to the jurisdiction.

Perform the following steps:

1. Click Main Menu in the menu bar at the top of the page and choose Shared Service Submission Tool. RCKMS displays the Shared Service Submission Tool page.
2. Select an Environment radio button and choose the environment you want. RCKMS allows you to pick either Production or Test Reporting Specifications.
3. Select a Payload Type radio button and choose the type of file you will be uploading. RCKMS allows you to pick either vMR or eICR Payload Types. To evaluate an eICR, be sure to select eICR Payload Types in this field.
4. Select the **Submission Time** you would like the file to be run through the Shared Service Submission Tool. RCKMS allows you to enter a date, but the file will still be run when you click Submit.

5. Click the **Choose File** button to select a file to upload. RCKMS allows you to upload a vMR or eICR file.

6. When finished, click the **Run Message** button. RCKMS displays the **Shared Service Results** page.

### 2.12 Shared Service Submission Tool Page

The *Shared Service Submission Tool* page displays options to upload a file and submit, and the view the output. You can choose the options you want and click **Run Message**.

![Shared Service Submission Tool](image)

The following table details the options on the page.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environment</td>
<td>Click to choose <strong>Production</strong> or <strong>Test</strong> reporting specifications.</td>
</tr>
<tr>
<td>Payload Type</td>
<td>Click to choose <strong>eICR</strong> as the type of message you are running.</td>
</tr>
<tr>
<td>Submission Time</td>
<td>Click <strong>Calendar Icon</strong> to enter a date. Regardless of the date, however, the test case will still be run when you click Submit.</td>
</tr>
<tr>
<td>Upload a File</td>
<td>Click <strong>Browse</strong> button to select a file to upload.</td>
</tr>
<tr>
<td>Run Message</td>
<td>Click <strong>Run Message</strong> to display the results.</td>
</tr>
</tbody>
</table>

### 2.13 Shared Service Results

There are 3 sections on the Shared Services Results page, the **Input** section, the **Response Details** section and the **Jurisdiction Information** section.

#### 2.13.1 Input Section

The **Input** section of the Shared Service Result page lists information about the Observation, the Encounter, and the Problem. It shows the **Event Time**, the **Observation Value Concept**, and the **Observation Focus**. It then shows the **Encounter Event Time** and the **Encounter Type**. It also shows the **Problem Code**, the **Problem Status**, the **Body Sites** (if applicable), the **Diagnostic Event Time** (if applicable) and the **Problem Effective Time**.
There are buttons at the bottom of the section to download three output files: CDS Input (Clinical Decision Support), RCKMS Input and RCKMS Output.

2.13.2 Response Details Section

The Response Details section displays information about the message, it lets you know if OpenCDS ran successfully and which Jurisdiction’s reporting specifications were run and if it ran successfully. The Response Code is displayed and the value of “200” indicate the message was successfully processed. The Request Date indicates the date the message was submitted to run.

2.13.3 Jurisdiction Information Section

The Jurisdiction Information section has a summary area and 5 additional sections:

- Reportable Conditions
- Logic Sets
- Criteria
- Links and References
- Output

In the summary area at the top of the Jurisdiction Information section, the following fields are displayed: Rules run for, Service Response Code, Message, Location Relevance, Authoring Agency, and Routing Entity.
The Authoring Agency listed is the agency who authored the rules that were run. An Authoring Agency could have authored rules on behalf of another agency (for example a State authoring rules for a Local Agency). The Routing Entity is the agency that receives the eICR and Reportability Response. The Routing Entity is defined during setup, on the Edit Jurisdiction page using the “Route eICR and Reportability Response to” field.

### 2.13.3.1 Reportable Conditions

The Reportable Conditions area lists Condition Name, Condition Code (from SNOMED), the NNC number, the Reporting Time Frame, the Specification ID, whether the case was Reportable or May Be Reportable, and the Responsible Agency.

<table>
<thead>
<tr>
<th>Reportable Conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Condition Name</td>
</tr>
<tr>
<td>Condition Code</td>
</tr>
<tr>
<td>NNC</td>
</tr>
<tr>
<td>Reporting Time Frame</td>
</tr>
<tr>
<td>Specification ID</td>
</tr>
<tr>
<td>Reportable</td>
</tr>
<tr>
<td>Responsible Agency</td>
</tr>
</tbody>
</table>

### 2.13.3.2 Logic Sets

The Logic Sets area lists the ID, Name, Reporter Type, and Reporting Time Frame of logic set that determined reportability for the condition listed in the Reportable Conditions area.

<table>
<thead>
<tr>
<th>Logic Sets</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
</tr>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Reporter Type</td>
</tr>
<tr>
<td>Reporting Time Frame</td>
</tr>
</tbody>
</table>

### 2.13.3.3 Criteria

The Criteria area lists the Relationship ID, Criteria ID, Name, and Criteria Type of the criteria used to determine reportability of the condition listed in the Reportable Conditions area.
2.13.3.4 Links and References

The Links and References area lists the ID, Name, Description, URL, Priority, Category, and Excerpts of Internal and External References associated with the Reporting Specification for a condition.

Note: External References are also included in the Reportability Response. The Name and Excerpt fields of the External References are for internal use only and will not appear on the Reportability Response. References are ordered by Category.

2.13.3.5 Output

The Output area shows more details about Observation Results, including Logic Sets, Criteria and Diagnosis (if applicable). It also displays a button that enables you to download the CDS Output. The Output will be generated as an XML file.

Within the RCKMS Output, there is a section entitled Location Relevance. Location Relevance describes which location’s rules (Facility Address, Patient Address, Lab Address) were used to determine that the case was reportable. Jurisdiction administrators can set where they would like to receive reports from in the Condition Details tab. For more information, refer to Section 2.4, Editing Details Information.
2.14 Differences between Test Case Manager and Shared Services Submission Tool

You can use both the Test Case Manager and the Shared Service Submission Tool to verify that your authored rules are working correctly and that the RCKMS output is populating as you would expect. There are, however, several differences between these two tools that are important to note.

2.14.1 Uses for the Test Case Manager vs. Shared Services Submission Tool

The test case manager is used ONLY to test rules logic. It does NOT test which jurisdiction’s rules are being used, based on address. The test case manager supports both criteria test cases and eICR files.

For example, if you are logged in as a Georgia administrator and run a criteria test case or a test eICR file, the test case manager will ALWAYS run the test cases against the Georgia rules. Test cases created in the test case manager are saved, creating a test case bank that can be rerun over time.

To learn more about the Test Case Manager, refer to section 3, Running Test Cases and View Results.

The Shared Services Submission Tool can be used to test rules logic AND will determine which jurisdiction’s rules should be used, based on address. This tool supports eICR files. Shared Service test cases are not saved.

For example, if you are logged in as a Georgia administrator, and you run a test case for New York, the Shared Services Submission tool will return a decision based on the rules for New York.

To learn more about the Shared Services Submission Tool, refer to section 5, Shared Services Submission Tool.

Generating Queries and Report Output. To manage jurisdiction information, refer to Section Error! Reference source not found., Error! Reference source not found.

2.15 Condition Details Only

The RCKMS Administrator can add a condition to their list of Reporting Specifications without the default reporting specification being complete. These conditions will have a red \( \text{✗} \) in the “Specification Added?” Column and the “Status” will be listed as “Condition Details Only”. The “Assigned To” value will be Null.
The Jurisdiction Administrator can use the **Add Reporting Specification** button to open the “Import Reporting Specification” screen. Conditions that do not have reporting specifications added will have an asterisk next to condition name in the drop down. There is a footnote appearing below the drop down stating “**Asterisk next to a condition name indicates that the reporting specifications are not yet authored**”.

After making a selection in the drop down list, the Jurisdiction Administrator can use the **Save Reporting Specification** button to add the “Condition Details Only” item to their reporting specifications list.

The following table details the options on the page.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The descriptive name of the condition.</td>
</tr>
<tr>
<td>Condition Code</td>
<td>The SNOMED code and name pertaining to the condition.</td>
</tr>
<tr>
<td>Category</td>
<td>The disease category organizing the condition. Options include Bloodborne, Enteric, Vaccine-Preventable Conditions and Zoonotic and Vectorborne Diseases, among others.</td>
</tr>
<tr>
<td>NNC Code</td>
<td>The nationally notifiable event code associated with the condition. This is only applicable if the condition is nationally notifiable.</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the reporting specification for the selected condition.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the reporting specification for the selected condition. In this case, it will be “Condition Details Only”.</td>
</tr>
<tr>
<td>Save Reporting Specification</td>
<td>Click to save the reporting specification information.</td>
</tr>
<tr>
<td>Apply</td>
<td>Click to save your changes and keep the window open.</td>
</tr>
<tr>
<td>Cancel/Close</td>
<td>Click to cancel your changes, or close if you have not made any changes and display the previous page.</td>
</tr>
</tbody>
</table>
When the RCKMS Administrator publishes the default reporting specification to Production, the Jurisdiction Administrator will be able to author the reporting specification for the published condition.
3 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 **Error! Reference source not found.** 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 or add 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.
   - Click **Contact Information** to add contact information for your jurisdiction. The reporter and public health agency will be notified with the contact information provided via the reportability response.
4. Do one of the following:
   - Click **Apply**. RCKMS saves your changes and keeps the window open.
   - Click **Save Jurisdiction**. RCKMS displays the **Jurisdictions** 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.
3.1.1 Jurisdiction page

The Jurisdiction page displays the information about your jurisdiction. You can click the Edit icon to view and edit your jurisdiction details.

![Image of Jurisdiction page]

The following table details the options on the page.

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

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

3.1.2 Edit Jurisdiction window

You use the Edit 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 following table details the options on the page.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Health Agency Details</td>
<td>Click to work with the PHA details. Options include, PHA Name and Type information, description and version information, and options for alternate routing of eICR and Reportability Response (RR) information. Currently, the “If my jurisdiction’s rules don’t exist, run rules for” field is not functional.</td>
</tr>
<tr>
<td>Conditions</td>
<td>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. For more information on statuses, see <a href="#">Publishing the Reporting Specification</a>.</td>
</tr>
<tr>
<td>ZIP Codes</td>
<td>Click to view or add ZIP codes included within your jurisdiction. Options include ZIP Code, City, County and State.</td>
</tr>
<tr>
<td>Users</td>
<td>Click to view the users within your PHA. Options include the user name and email contact information.</td>
</tr>
<tr>
<td>Contact Information</td>
<td>Click to view and add contact information for your jurisdiction. The contact information can be used for the Rules Authoring Agency, Responsible Agency, and/or Routing Entity. All addresses authored as Contact Information will be displayed on the Reportability Response.</td>
</tr>
<tr>
<td>Save Jurisdiction</td>
<td>Click to save the jurisdiction information.</td>
</tr>
<tr>
<td>Apply</td>
<td>Click to save your changes and keep the window open.</td>
</tr>
<tr>
<td>Cancel/Close</td>
<td>Click to cancel your changes, or close if you have not made any changes and display the previous page.</td>
</tr>
</tbody>
</table>

### 3.1.3 Zip Codes

You can use the Zip Codes tab to add zip codes that are included in your jurisdiction. This provides the ability for local public health agencies to indicate that when an eICR is received and processed in RCKMS and the zip code associated with either the patient address, or the facility address match a zip code in their public health agency’s zip code list, that their agency’s rules should be run. If states or other local jurisdictions also wish to have cases from those zip codes evaluated against their rules, they can list those zip codes in their respective PHA Zip Codes tab. Multiple jurisdictions can list the same zip code. The routing of the report to a jurisdiction is based on the Routing Entity defined in the Edit Jurisdictions tab.
**Note:** In most cases, ONLY local jurisdictions will need to input their zip codes. State jurisdictions do not need to input all zip codes for their state. To learn more about zip code use for your particular case, please contact an RCKMS team member at RCKMS@cste.org.

The following table details the options on the page.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Jurisdiction Zip Code</td>
<td>Click to open the <strong>New Jurisdiction Zip Code</strong> pane.</td>
</tr>
<tr>
<td>Zip Code</td>
<td>Type the zip code for the designated area</td>
</tr>
<tr>
<td>City</td>
<td>Enter a city for the selected zip code.</td>
</tr>
<tr>
<td>County</td>
<td>Enter a county for the selected zip code.</td>
</tr>
<tr>
<td>State</td>
<td>Select a state from the dropdown for the selected zip code.</td>
</tr>
<tr>
<td>Save Jurisdiction Zip Code</td>
<td>Click to save the jurisdiction zip code.</td>
</tr>
<tr>
<td>Apply</td>
<td>Click to save your changes and keep the window open.</td>
</tr>
<tr>
<td>Cancel/Close</td>
<td>Click to cancel your changes, or close if you have not made any changes and display the previous page.</td>
</tr>
</tbody>
</table>

### 3.1.4 Contact Information

You can use the Contact Information window to author contact information for your public health agency. You can add information for the Rules Authoring Agency, Responsible Agency, and/or Routing Entity.

The reporter and public health agency will be notified with the contact information provided via the reportability response.
The following table details the options on the page.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use For</td>
<td>Click the box next to <strong>Rules Authoring Agency</strong>, <strong>Responsible Agency</strong>, and/or <strong>Routing Entity</strong> to assign contact information to that agency. The contact information can be assigned to one or more of these agencies.</td>
</tr>
<tr>
<td>Description</td>
<td>Type a description for the contact information.</td>
</tr>
<tr>
<td>Street Address</td>
<td>Enter the street address for the selected agency.</td>
</tr>
<tr>
<td>City</td>
<td>Enter a city for the selected agency.</td>
</tr>
<tr>
<td>State</td>
<td>Select a state from the dropdown for the selected agency.</td>
</tr>
<tr>
<td>Zip Code</td>
<td>Enter a zip code for the selected agency.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>Enter a phone number for the selected agency.</td>
</tr>
<tr>
<td>Email</td>
<td>Enter an email address for the selected agency.</td>
</tr>
<tr>
<td>Fax Number</td>
<td>Enter a fax number for the selected agency.</td>
</tr>
<tr>
<td>Save Contact Information</td>
<td>Click to save the contact information.</td>
</tr>
<tr>
<td>Apply</td>
<td>Click to save your changes and keep the window open.</td>
</tr>
<tr>
<td>Cancel/Close</td>
<td>Click to cancel your changes, or close if you have not made any changes and display the previous page.</td>
</tr>
</tbody>
</table>
4 Running Test Cases and Viewing Results

You can run a test case and view its results using the **Test Cases page**. The test cases defined here are saved for reuse. However, the results of the testing are not saved within RCKMS. 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 type of reporter provide the expected results. Test case run through the test manager always execute against your jurisdiction’s reporting specifications.

The purpose of the test case manager is to test that the criteria and logic of your rules are working as you expect. The test case manager has the ability to test both criteria test cases, focused specifically on testing a specific criterion, and file test cases that can test the rules for your jurisdiction.

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 test 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 2.7, **Adding and Editing Specification Information**. For more detail on reporting criteria, refer to Section 2.6, **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.
4.1 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. This should follow naming conventions established by your organization for new test cases.
   d. Click Description and type the description you want.
   e. Click a Condition Expected to be Reportable radio button to indicate that the test case is expected to return one of the following results:
      i. Reportable – Yes radio button
      ii. May be Reportable – May be reportable radio button
         1. May be reportable refers to age-related cases where the age criteria is missing. Without the age information, RCKMS cannot determine whether or not the case is reportable, so it returns a “May be Reportable” response with the reason included.
      iii. Not Reportable – No radio button
   f. Click Reporter Type and choose the reporter type you want.
   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**. **Note. To work with file-based test case input, go to step 5 in these procedures.**
   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. The Criteria Template refers to the type of criteria you are intending to test (ex. Diagnosis, Lab Test Results). 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 the **eICR** to work with **eICR** file-based input. RCKMS displays the **Browse...** button.
   c. Click the **Choose File** 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:
      i. 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**.
      ii. 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*.

### 4.1.1 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.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reporting Specifications</td>
<td>Click and choose the reporting specification for the condition you want.</td>
</tr>
<tr>
<td>Show entries</td>
<td>Click drop-down and choose the number of items to display in the grid.</td>
</tr>
<tr>
<td>Name</td>
<td>The test case name.</td>
</tr>
<tr>
<td>Payload Type</td>
<td>The payload type associated with the test case. Options include eICR and vMR.</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>Run Test</td>
<td>Click to run the test case.</td>
</tr>
<tr>
<td>Previous</td>
<td>Click to navigate back through the list of items available.</td>
</tr>
<tr>
<td>Next</td>
<td>Click to navigate forward through the list of items available.</td>
</tr>
<tr>
<td>Add Test Case</td>
<td>Click to add a new test case and display the New Test Case page.</td>
</tr>
</tbody>
</table>
Click the Sort icon at the top of each column to sort the information.

4.1.2 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.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reporting Specification</td>
<td>The reporting specification associated with the test case. Click to choose the condition you want.</td>
</tr>
<tr>
<td>Name</td>
<td>The test case name.</td>
</tr>
<tr>
<td>Description</td>
<td>The test case description, such as the rules and criteria to be tested.</td>
</tr>
<tr>
<td>Reporter Type</td>
<td>The reporter type associated with the test case.</td>
</tr>
<tr>
<td>Condition Expected to be Reportable</td>
<td>Click radio button to indicate if the test case for the condition is expected to be Reportable (Yes), May be Reportable (May be reportable), or Not Reportable (No).</td>
</tr>
<tr>
<td>Skip this test</td>
<td>Click to skip test execution.</td>
</tr>
<tr>
<td>Run Test</td>
<td>Click to run the test case. The Run Test button displays after you save the test case.</td>
</tr>
<tr>
<td>Save Test Case</td>
<td>Click to save the test case and display the Test Cases page.</td>
</tr>
<tr>
<td>Apply</td>
<td>Click to save your changes and keep the window open.</td>
</tr>
</tbody>
</table>
4.1.3 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.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cancel/Close</td>
<td>Click to cancel your changes, or close if you have not made any changes and display the previous page.</td>
</tr>
</tbody>
</table>

The following table details the options on the page.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td>The gender associated with the test case. Click and choose gender you want.</td>
</tr>
<tr>
<td>Offset Based</td>
<td>Click to indicate the test case is offset based on age criteria. On selection, RCKMS displays the Age Offset field.</td>
</tr>
<tr>
<td>Age Offset</td>
<td>Click and type the offset age.</td>
</tr>
<tr>
<td>Date-based</td>
<td>Click to indicate the test case is date-based according to date of birth and date of execution. On selection, RCKMS displays the Date of Birth, Execution Date and Age at Execution fields. Date-based cases may be particularly important for conditions that consider age (ex. Pertussis).</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>The date of birth.</td>
</tr>
<tr>
<td>Execution Date</td>
<td>The date of execution.</td>
</tr>
<tr>
<td>Age at Execution</td>
<td>The age of execution for date-based testing.</td>
</tr>
<tr>
<td>Run Test</td>
<td>Click to run the test case. The Run Test button displays after you save the test case.</td>
</tr>
</tbody>
</table>
### 4.1.4 Test Inputs tab

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

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save Test Case</td>
<td>Click to save the test case and display the <a href="#">Test Cases page</a>.</td>
</tr>
<tr>
<td>Apply</td>
<td>Click to save your changes and keep the window open.</td>
</tr>
<tr>
<td>Cancel/Close</td>
<td>Click to cancel your changes, or close if you have not made any changes and display the previous page.</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criteria</td>
<td>Indicates the test source is criteria-based. Click <strong>Criteria</strong> to indicate criteria-based testing. On selection, RCKMS displays the <strong>Test Case Inputs</strong> options you use to enter the criteria to be tested. <strong>NOTE:</strong> For “May be reportable” expected result, the expected criteria selected should be a combination of Necessary and Optional. For a “May Be reportable” expected result, the specification would include an age criterion, but the age would be missing in the test data.</td>
</tr>
<tr>
<td>File</td>
<td>Indicates the test source is based on a file payload. Click <strong>File</strong> to indicate file-based testing. On selection, RCKMS displays the <strong>Payload Type</strong> options, eICR and vMR.</td>
</tr>
<tr>
<td>Payload Type</td>
<td>Indicates the file payload is eICR or vMR. Choose the option you want. On selection, RCKMS displays the <strong>Choose File</strong> button. Click <strong>Choose File</strong> to select the file you want.</td>
</tr>
<tr>
<td>Item</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Upload a File</td>
<td>Click <em>Choose File</em> and choose the file you want.</td>
</tr>
<tr>
<td>Test Case Inputs</td>
<td>Displays the reporting criteria information to be tested.</td>
</tr>
</tbody>
</table>

The *Test Case Input* table includes the following columns.

<table>
<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>

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expected Criteria</td>
<td>Displays the expected criteria to fire on test execution.</td>
</tr>
</tbody>
</table>

The *Expected Criteria* table includes the following columns.

<table>
<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>

Run Test   Click to run the test case. The *Run Test* 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.
4.1.5 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.

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

The Expected Criteria window displays options for selecting the condition criteria that you expect to execute when the test case is run.

The following table details the options on the page.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criteria Template</td>
<td>The template of pre-populated options upon which the criteria is based. Click <strong>Criteria Template</strong> and choose the condition criteria that you expect to execute when the test case is run.</td>
</tr>
<tr>
<td>Save Expected Criteria</td>
<td>Click to save the test case input information.</td>
</tr>
<tr>
<td>Apply</td>
<td>Click to save your changes and keep the window open.</td>
</tr>
<tr>
<td>Cancel/Close</td>
<td>Click to cancel your changes, or close if you have not made any changes and display the previous page.</td>
</tr>
</tbody>
</table>
4.1.7 Test Results page

The Test Results page displays a summary of the results and options to display the test case details after running the test case, including options for viewing and downloading XML representations of the test input and results 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 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. You can hover your mouse over these options for more details. 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 displays what you chose as the criteria Expected to be Reportable to the criteria that is found to Actually Be Reportable:

- You indicate the Expected Reportable information using the Expected Reportable option in the test case.
- The Actual Reportable information indicates if the test case resulted in a determination of reportability.

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. It may or may not match the criteria *Expected to be met*. If the expected and actual do not match then the reporting specifications should be examined to determine the reason for the mismatch and if the mismatch can be explained. Note that the **Actual Criteria Met** does not affect the test result outcome.

The following table details the options on the page.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reporter Type</td>
<td>The reporter type associated with the test case.</td>
</tr>
<tr>
<td>Test Result</td>
<td>The test result. The test result compares the <strong>Expected Reportable</strong> information to that you indicate as <strong>Actual Reportable</strong>.</td>
</tr>
<tr>
<td>Expected Reportable</td>
<td>This specifies if the test case is expected to be reportable. You indicate the <strong>Expected Reportable</strong> information using the <em>Condition Expected to be Reportable</em> option in the test case.</td>
</tr>
<tr>
<td>Actual Reportable</td>
<td>The test case evaluation of actual reportability. It represents the determination of whether the <strong>Expected Reportable</strong> Condition is reportable based on exercising the test input through all of a PHA's reporting specifications.</td>
</tr>
<tr>
<td>Expected Reportable Condition</td>
<td>The reportable condition that was expected to be found. You indicate the <strong>Expected Reportable Condition</strong> by selecting a condition under the <em>Reporting Specification</em> field in the test case.</td>
</tr>
<tr>
<td>Actual Reportable Condition</td>
<td>The actual reportable condition met. 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.</td>
</tr>
<tr>
<td>Expected Criteria Met</td>
<td>The criteria that was expected to be met. The <strong>Expected Criteria Met</strong> does not affect the test result outcome. It is the criteria you expect to be met when the test case is run.</td>
</tr>
<tr>
<td>Actual Criteria Met</td>
<td>The actual criteria that is met. It represents one or more criteria that are met based on running the test input through all of a PHA's reporting specifications. The <strong>Actual Criteria Met</strong> does not affect the test result outcome.</td>
</tr>
<tr>
<td>Item</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Duration</td>
<td>The test case execution time in milliseconds.</td>
</tr>
<tr>
<td>Jurisdiction Information</td>
<td>Click to display jurisdiction information.</td>
</tr>
<tr>
<td>Test Subject</td>
<td>Click to display test subject information.</td>
</tr>
<tr>
<td>Test Inputs</td>
<td>Click to display test source and expected criteria information.</td>
</tr>
<tr>
<td>Logs and Messages</td>
<td>Click to display messages generated during test case execution indicating reportability outcome following test case execution.</td>
</tr>
<tr>
<td>Links and References</td>
<td>Click to display link and message information associated with the reporting criteria.</td>
</tr>
<tr>
<td>Input XML</td>
<td>Click to display vMR XML input file contents representing the information and options submitted in the test case.</td>
</tr>
<tr>
<td>Output XML</td>
<td>Click to display vMR XML output file contents representing the information and options resulting from the test case execution.</td>
</tr>
<tr>
<td>Close</td>
<td>Click to close and display the previous page.</td>
</tr>
</tbody>
</table>
5 Shared Service Submission Tool

Similar to the file testing capability in the Test Case Manager tool, the Shared Service Submission Tool allows you to test reporting specifications with an input file. When you run the Shared Service Submission Tool, 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 as determined by the routing information in the uploaded test file. A successful test case provides you confirmation that the criteria and rules for a given reporter provide the expected results. Importantly, when a test case file is run using the Shared Service Submissions Tool, it assesses the address information in the file to determine the jurisdiction whose rules should be run. The zip code section under the Edit Jurisdictions provides additional detail on how the match between eICR address fields, and the zip codes associated with a jurisdiction are used to determine the jurisdictional rules to be run.

You use the Shared Service Submission Tool to confirm the criteria as Sufficient, Necessary, and Optional based on rules for the applicable 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 applicable reporter type. You can run the test cases to account for any jurisdiction-specific information contained in the uploaded file. The Shared Service tool:

- Matches the Patient address zip code in the eICR to zip codes associated with PHAs in RCKMS. If a match is found that jurisdiction’s rules are run. If no match is found the Patent address state code is used to do the match.
- Matches the Facility address zip code in the eICR to zip codes associated with PHAs in RCKMS. If a match is found that jurisdiction’s rules are run. If no match is found the Facility address state code is used to do the match.
- If a condition is identified when the jurisdiction’s rules are run then the SST checks the Specifications Apply When settings associated with the Reporting Specification for the condition.
  - If the patient’s address was in the jurisdiction and Specifications Apply When setting was to report if the Patient is a Resident of the Jurisdiction, then the report would be sent to the jurisdiction.
  - If the facility address was in the jurisdiction and the Specifications Apply When setting was to report if Care was Provided in the Jurisdiction, then the report would be sent to the jurisdiction.

Perform the following steps:

7. Click Main Menu in the menu bar at the top of the page and choose Shared Service Submission Tool. RCKMS displays the Shared Service Submission Tool page.
8. Select an Environment radio button and choose the environment you want. RCKMS allows you to pick either Production or Test Reporting Specifications.
9. Select a Payload Type radio button and choose the type of file you will be uploading. RCKMS allows you to pick either vMR or eICR Payload Types. To evaluate an eICR, be sure to select eICR Payload Types in this field.
10. Select the **Submission Time** you would like the file to be run through the Shared Service Submission Tool. RCKMS allows you to enter a date, but the file will still be run when you click Submit.

11. Click the **Choose File** button to select a file to upload. RCKMS allows you to upload a vMR or eICR file.

12. When finished, click the **Run Message** button. RCKMS displays the **Shared Service Results** page.

5.1 Shared Service Submission Tool Page

The **Shared Service Submission Tool** page displays options to upload a file and submit, and the view the output. You can choose the options you want and click **Run Message**.

![Shared Service Submission Tool](image)

The following table details the options on the page.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environment</td>
<td>Click to choose <strong>Production</strong> or <strong>Test</strong> reporting specifications.</td>
</tr>
<tr>
<td>Payload Type</td>
<td>Click to choose <strong>eICR</strong> as the type of message you are running.</td>
</tr>
<tr>
<td>Submission Time</td>
<td>Click <strong>Calendar Icon</strong> to enter a date. Regardless of the date, however, the test case will still be run when you click Submit.</td>
</tr>
<tr>
<td>Upload a File</td>
<td>Click <strong>Browse</strong> button to select a file to upload.</td>
</tr>
<tr>
<td>Run Message</td>
<td>Click <strong>Run Message</strong> to display the results.</td>
</tr>
</tbody>
</table>

5.2 Shared Service Results

There are 3 sections on the Shared Services Results page, the **Input** section, the **Response Details** section and the **Jurisdiction Information** section.

5.2.1 Input Section

The **Input** section of the Shared Service Result page lists information about the Observation, the Encounter, and the Problem. It shows the **Event Time**, the **Observation Value Concept**, and the **Observation Focus**. It then shows the **Encounter Event Time** and the **Encounter Type**. It also shows the **Problem Code**, the **Problem Status**, the **Body Sites** (if applicable), the **Diagnostic Event Time** (if applicable) and the **Problem Effective Time**.
There are buttons at the bottom of the section to download three output files: **CDS Input** (Clinical Decision Support), **RCKMS Input** and **RCKMS Output**.

5.2.2 Response Details Section

The **Response Details** section displays information about the message, it lets you know if OpenCDS ran successfully and which Jurisdiction’s reporting specifications were run and if it ran successfully. The **Response Code** is displayed and the value of “200” indicate the message was successfully processed. The **Request Date** indicates the date the message was submitted to run.

5.2.3 Jurisdiction Information Section

The **Jurisdiction Information** section has a summary area and 5 additional sections:

- Reportable Conditions
- Logic Sets
- Criteria
- Links and References
- Output

In the summary area at the top of the Jurisdiction Information section, the following fields are displayed: Rules run for, Service Response Code, Message, Location Relevance, Authoring Agency, and Routing Entity.
The Authoring Agency listed is the agency who authored the rules that were run. An Authoring Agency could have authored rules on behalf of another agency (for example a State authoring rules for a Local Agency). The Routing Entity is the agency that receives the eICR and Reportability Response. The Routing Entity is defined during setup, on the Edit Jurisdiction page using the “Route eICR and Reportability Response to” field.

### 5.2.3.1 Reportable Conditions

The Reportable Conditions area lists Condition Name, Condition Code (from SNOMED), the NNC number, the Reporting Time Frame, the Specification ID, whether the case was Reportable or May Be Reportable, and the Responsible Agency.

### 5.2.3.2 Logic Sets

The Logic Sets area lists the ID, Name, Reporter Type, and Reporting Time Frame of logic set that determined reportability for the condition listed in the Reportable Conditions area.

### 5.2.3.3 Criteria

The Criteria area lists the Relationship ID, Criteria ID, Name, and Criteria Type of the criteria used to determine reportability of the condition listed in the Reportable Conditions area.
5.2.3.4 **Links and References**

The Links and References area lists the ID, Name, Description, URL, Priority, Category, and Excerpts of Internal and External References associated with the Reporting Specification for a condition.

Note: External References are also included in the Reportability Response. The Name and Excerpt fields of the External References are for internal use only and will not appear on the Reportability Response. References are ordered by Category.

5.2.3.5 **Output**

The Output area shows more details about Observation Results, including Logic Sets, Criteria and Diagnosis (if applicable). It also displays a button that enables you to download the CDS Output. The Output will be generated as an XML file.

Within the RCKMS Output, there is a section entitled Location Relevance. Location Relevance describes which location’s rules (Facility Address, Patient Address, Lab Address) were used to determine that the case was reportable. Jurisdiction administrators can set where they would like to receive reports from in the Condition Details tab. For more information, refer to Section 2.4, **Editing Details Information**.
5.3 Differences between Test Case Manager and Shared Services Submission Tool

You can use both the Test Case Manager and the Shared Service Submission Tool to verify that your authored rules are working correctly and that the RCKMS output is populating as you would expect. There are, however, several differences between these two tools that are important to note.

5.3.1 Uses for the Test Case Manager vs. Shared Services Submission Tool

The test case manager is used ONLY to test rules logic. It does NOT test which jurisdiction’s rules are being used, based on address. The test case manager supports both criteria test cases and eICR files.

For example, if you are logged in as a Georgia administrator and run a criteria test case or a test eICR file, the test case manager will ALWAYS run the test cases against the Georgia rules. Test cases created in the test case manager are saved, creating a test case bank that can be rerun over time.

To learn more about the Test Case Manager, refer to section 3, Running Test Cases and View Results.

The Shared Services Submission Tool can be used to test rules logic AND will determine which jurisdiction’s rules should be used, based on address. This tool supports eICR files. Shared Service test cases are not saved.

For example, if you are logged in as a Georgia administrator, and you run a test case for New York, the Shared Services Submission tool will return a decision based on the rules for New York.

To learn more about the Shared Services Submission Tool, refer to section 5, Shared Services Submission Tool.
6 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.

The blue Authoring Status button generates Jurisdiction Reports for specific jurisdictions.

2. Click Authoring Status and your jurisdiction should appear in the text box, and report should generate automatically.

3. Click the Export Report button. RCKMS displays the report output which can be printed by clicking the Print button, and also saved as a PDF.

The blue Condition Details button generates Condition Reports for specific jurisdictions.

4. Navigate back to the Reports page per step 1 above.

5. Click Condition Details followed by the jurisdiction you want and click Next.

6. Click the condition you want.

7. Click the Export Report button. RCKMS displays the report output which can be printed by clicking the Print button, and can also be saved as a PDF.
6.1 Reports page

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

The following table details the options on the page.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reports (page)</td>
<td>Click to choose a Jurisdiction Report or Condition Report.</td>
</tr>
<tr>
<td>Authoring Status</td>
<td>Click to choose the jurisdiction to run the report. As a Jurisdiction Administrator, your jurisdiction will be pre-populated in the dropdown underneath the text box. This selecting your jurisdiction will create a Jurisdiction Report.</td>
</tr>
<tr>
<td>Condition Details</td>
<td>Click to first choose the jurisdiction you want for the report, or select Default for your own jurisdiction. After selecting a jurisdiction or Default and clicking Next, you will be prompted with a second drop-down to select the condition you want for the report. This will create a Condition Report for the jurisdiction of your choosing.</td>
</tr>
<tr>
<td>Export Report</td>
<td>Click to enlarge embedded report. This will allow you to print or save report as a PDF by clicking the Print button.</td>
</tr>
<tr>
<td>Next</td>
<td>Click to progress to next input for report.</td>
</tr>
<tr>
<td>Back</td>
<td>Click to return to the previous page.</td>
</tr>
<tr>
<td>Print</td>
<td>Click to print the report or click File, Save As and select Print to PDF to save the report.</td>
</tr>
</tbody>
</table>
6.1.1 Authoring Status Report

The Authoring Status Report displays a summary output of your jurisdiction. This generates a Jurisdiction Report that includes public health agency details, condition list, zip codes, user list, responsible agency by condition and external links and references by condition.

By clicking Export Report, you will be able to view the embedded document in full view.

By clicking Print, you will be able to save the document as a PDF, as well as print.

6.1.2 Condition Details Report

The Condition Details Report displays detailed output of the reporting specification for the condition you select, and listings of the Sufficient, Necessary and Optional reporting rules. Additionally, the Condition Details Report generates reporting specification status, reporting preferences, links and references, logic set details, criteria list, concept and value sets.

Select the jurisdiction you want.
Select a condition and **Export Report** to Print or save the file to PDF.
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.

Authoring Status Report

The Authoring Status Report displays a summary output of your jurisdiction. This generates a Jurisdiction Report that includes public health agency details, condition list, zip codes, user list, responsible agency by condition and external links and references by condition.

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.

Condition Details Report

The Condition Details Report displays detailed output of the reporting specification for the condition you select, and listings of the Sufficient, Necessary and Optional reporting rules. Additionally, the Condition Details Report also generates reporting specification status, reporting preferences, links and references, logic set details, criteria list, concept and value sets.

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.

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.

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 person’s 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.
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 criterion is needed. Optional criteria must be paired with at least one Necessary criterion 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.

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.

Publish

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.
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 publish 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.
Responsible Agency

The description of the public health agency that to which reporting is legally required.

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.

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.
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/](https://vsac.nlm.nih.gov/))

Virtual Medical Record (vMR)

A simplified, standardized 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. *NOT RECOMMENDED.*

XML

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