

Chart Lake

Reveleer is excited to introduce Chart Lake. This document outlines how Reveleer can be used as a chart repository for service organizations to centralize and store charts, the new project type “Chart Lake” has been created to allow loading of member information and to upload and associate medical records with member information in the Reveleer platform. You will also find a comprehensive Step-by-Step Guide you can use for training. For additional inquiries see the FAQ.

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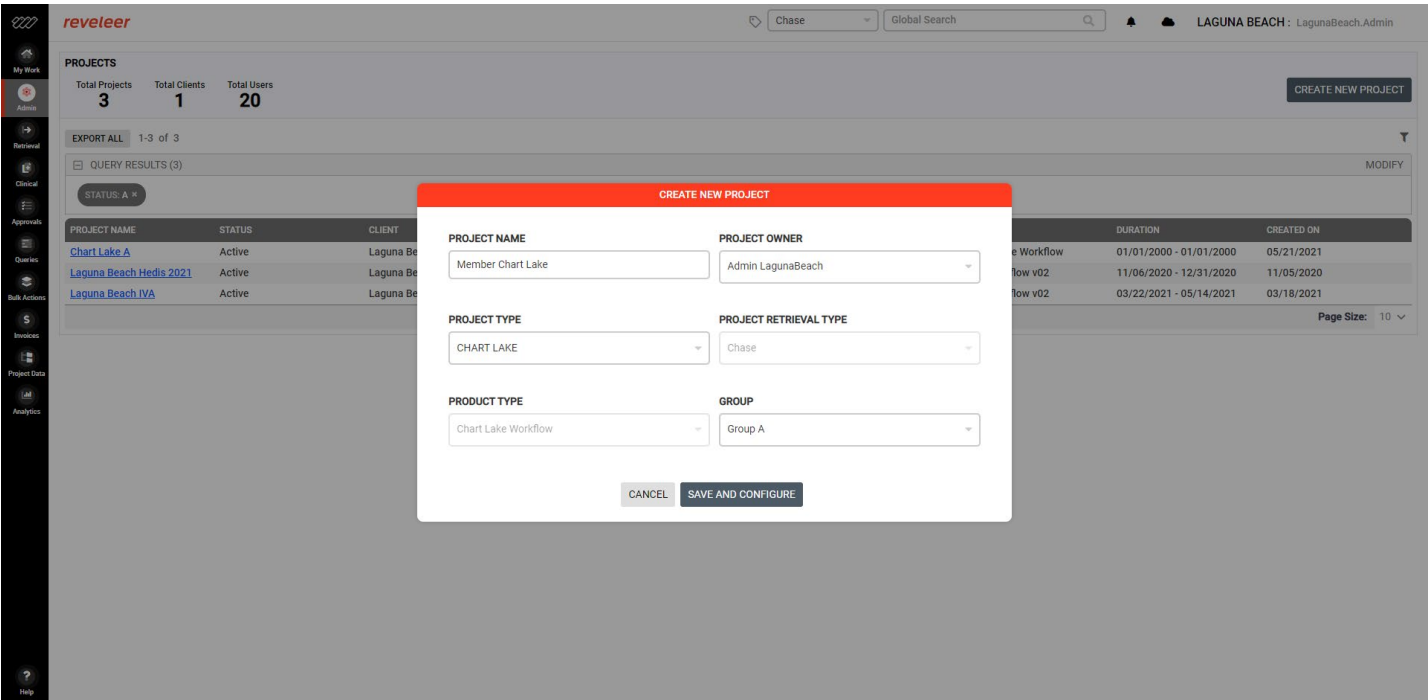
Overview

Chart Lake Setup

Chart Lake Project Creation

Administrators can create a new Chart Lake project to begin the process of uploading a member list and associating charts for their members. This new project type will have a simplified setup process so that administrators can proceed directly to data load after configuring the project.

Permissions: Admin



reveleer Chase Global Search LAGUNA BEACH : LagunaBeach.Admin

← PROJECT CHART LAKE A CONFIGURATION

Project Settings

GENERAL SETTINGS

PROJECT NAME:
Chart Lake A

SET PROJECT STATUS
INACTIVE ☐ ACTIVE ☒

PROJECT OWNER
Admin LagunaBeach

SAVE

Data Load

New Data Load

After project creation, chart Lake projects will be selectable in the Project Data -> Data Load section. A member load file is required to populate the member information and for charts to attach into the Reveleer platform.

Permissions: Admin, Data Management Manager

reveleer Chase Global Search LAGUNA BEACH : LagunaBeach.Admin

DATA LOAD

The data load page lets you upload new or update your project's chase and attribute data.
To upload new data to a new project, choose Full as the load type. To replace existing data with a new upload, choose Admin Refresh as the load type. To add new data to an existing project, choose incremental as the load type.

SELECT PROJECT: Chart Lake A PROJECT ID: 592 SELECT LOAD TYPE: Full

DATA IMPORT INSTRUCTIONS [DOWNLOAD INSTRUCTIONS](#)

We've put together a detail data requirements that you can access to get familiar with our upload requirements. Please download the attached instruction file to get the complete list of required fields and rules for your data upload.

Please read each data requirements carefully and ensure that your files have the required data to avoid interruptions with your data upload.

Member File*
Chart_Lake_Member-Load-File.csv BROWSE

RESET IMPORT

Chart Lake Member File Format

The new Chart Lake Project will support a consolidated load of member demographic information and associated chart files to be uploaded to the Reveleer system. The following specification should be used for populating and formatting the member list to be uploaded during data load when a Chart Lake Project is selected.

| Field | Description | Type | Length | Value/Format | Requirement | Remarks |
|-------------------|---|------|--------|--------------------|-------------|--|
| MemberID | A unique ID provided to a Member by the Client or Health Plan | Char | 50 | | Required | |
| LastName | Last Name of the Member | Char | 50 | | Required | |
| FirstName | First Name of the Member | Char | 50 | | Required | |
| MiddleName | Middle Initial of the Member | Char | 50 | | Optional | |
| DateOfBirth | Date of Birth of the Member | Date | 10 | MM/DD/YYYY | Required | |
| Gender | Gender of the Member (Acceptable values: M, F) | Char | 1 | | Required | |
| Address1 | Address of the Patient/Member | Text | 50 | | Required | Primary Address |
| Address2 | Additional details of the address of the Patient/Member | Text | 50 | | Required | Primary Address |
| City | Name of the City as a part of Patient/Member Address | Text | 50 | | Required | Primary Address |
| State | Name of the State as a part of Patient/Member Address | Text | 2 | | Required | Primary Address |
| Zip | Zip code as part of Patient/Member Address | Text | 5 | | Required | Primary Address |
| Phone | Phone number of the Patient/Member | Text | 10 | | Optional | |
| Fax | Fax # of the Patient/Member | Text | 15 | | Optional | |
| Email | Email Address of the Patient/Member | Text | 255 | | Optional | |
| ContactTimeFrom | Prefer time to contact the member | Text | 8 | HH:MM:SS | Optional | |
| ContactTimeTo | Prefer time to contact the member | Text | 8 | HH:MM:SS | Optional | |
| PrimaryLanguage | Preferred Primary language for communication | Text | 50 | English Spanish | Optional | |
| SecondaryLanguage | Preferred Secondary language for communication | Text | 50 | English Spanish | Optional | |
| HICN | Health Insurance Claim Number | Char | 10 | | Conditional | Required for Medicare and Medicaid if No MBI |
| MBI | Member Beneficiary Identifier | Char | 11 | | Conditional | Required for Medicare and Medicaid if No HICN |
| HIOS | HIOS Number for Member | Text | 10 | | Conditional | Required for Commercial LOB |
| SubscriberID | Member Subscriber Identifier | Char | 50 | | Conditional | Required for Commercial LOB |
| SubscriberSuffix | Member Suffix for the Subscriber (Relationship to Subscriber) | Num | 2 | | Conditional | Required for Commercial LOB |
| ChartFileName | Chart image name. If images are being provided by the client, supply the chart name associated with the chase in this field. Must have a ".pdf" extension. This can potentially be used for a chart crosswalk upload later. | Text | 255 | | Optional | |
| Comments | Chart level comments that will appear in the comments history of each chart. | Text | 8000 | | Optional | |
| ChaseTag | Chart level tag. Each tag is limited to 50 Characters, then separated using a semi-colon (;). Multiple tags may be submitted up to a total allowable 500 characters. | Text | 500 | | Optional | For attributes to add to a chart such as Measure information, format as "Attribute=Value" (i.e. MEASURE=CDC) |

Bulk Chart Uploads

Upload and Attach Charts via Chart File Name

During data load, each member can have a "ChartFileName" specified, which will be used for file uploads to attach charts. Users will be able to use the Bulk Upload feature or via a configured sFTP connection to upload their members charts into Reveleer. These charts will be automatically associated to the corresponding member based on the ChartFileName as defined in the Data Load File.

Chase
Global Search
10
DEMO : demo.admin

BULK UPLOAD

Want to work faster not harder? On this page, you can Bulk Upload by Chase IDs, Client Chase Key, or upload documents for Intake.

SELECT ORIGINAL RETRIEVAL METHOD

Bulk Upload

SELECT FORMAT TYPE

Documents for Intake

UPLOAD DOCUMENTS

Max upload size per file is 200 MB.

Accuracy of Optical Character Recognition Software Google Tesseract.pdf

Total Documents: 2

BROWSE **VALIDATE**

EXPORT ALL

| FILE | FILE SIZE | CHASE ID | MESSAGE | STATUS |
|------------------------------|-----------|----------|--------------|--------|
| PageLayoutAnalysisICDAR2.pdf | 0.43MB | 0 | OK to Upload | |

1

Member File

Member Query

Once initial data load has been completed for a Chart Lake project, these records can be queried and reviewed within the platform using the Member Query feature. After the search, you can select specific members and click in to view their member file to view the charts and chases associated with those members.

The screenshot shows the Reveleer Member Query interface. A modal window titled "MEMBER QUERY" is open, allowing users to search for members. The modal has two tabs: "Project" and "Member". The "Member" tab is selected, showing fields for "FIRST NAME", "LAST NAME" (with "Smith" entered), "DOB" (with "01/01/1990" entered), "MEMBER ID", "MEMBER KEY", and "PROJECT STATUS" (with "Active" selected). At the bottom of the modal are buttons for "CANCEL", "CLEAR", and "RUN QUERY". In the background, the main interface shows a list of query results for "PROJECT: ChartLake AZ 2021" with columns for MEMBER ID, MEMBER KEY, FIRST NAME, LAST NAME, DOB, GENDER, CHASES, and STATUS. The first few rows of the table are visible, showing members with IDs 1729298 through 1729315.

The screenshot shows the Reveleer Member Query interface with the results of a query displayed. The query filters are "PROJECT: ChartLake AZ 2021" and "PROJECT STATUS: Active". The results table has the following columns: MEMBER ID, MEMBER KEY, FIRST NAME, LAST NAME, DOB, GENDER, CHASES, and STATUS. The first six rows of the table are shown, with the first row highlighted.

| MEMBER ID | MEMBER KEY | FIRST NAME | LAST NAME | DOB | GENDER | CHASES | STATUS |
|-------------------------|------------|------------|-----------|------------|--------|--------|--------|
| 1729298 | 4999649 | Matilda | Musgrave | 11/28/1955 | F | 1 | Active |
| 1729299 | 4999650 | Matilda | Warwick | 11/28/1955 | F | 3 | Active |
| 1729300 | 49996501 | Tom | Fenter | 03/02/1956 | M | 1 | Active |
| 1729301 | 4999651 | Tom | Walker | 03/02/1956 | M | 1 | Active |
| 1729302 | 49996511 | Marlene | Robbins | 05/28/1955 | F | 1 | Active |
| 1729303 | 4999652 | Debbie | Popsy | 12/29/1952 | F | 1 | Active |

Chase
Global Search

REVEALER TEST : vince.dev

MEMBER FILE: [MATILDA WARWICK](#)
DOB: 11/28/1955 Gender: F Member ID: 1729299 Member Key: 4999650

Select Next Action
GO
T

BASIC
CREATE NEW VIEW

| CHASE ID | CLIENT CHASE KEY | PROJECT | MEASURE | CREATED | PROVIDER | CHASE COMPLIANCE | SAMPLE COMPLIANCE |
|-------------------------|--------------------|-------------------|----------|------------|----------|------------------|-------------------|
| 2430466 | 117047326111453... | ChartLake AZ 2021 | MBRCHART | 04/27/2021 | | | |
| 2430467 | 155385612711727... | ChartLake AZ 2021 | MBRCHART | 04/27/2021 | | | |
| 2430468 | 191676114672915... | ChartLake AZ 2021 | MBRCHART | 04/27/2021 | | | |

Page Size: 25

Member File View and Chart Copy

Once member charts have been uploaded, these charts can be viewed in the platform. Additionally, if there were tags or comments included in the data load file, they will be visible within the chart view as well. These charts can also be used to copy to other chases associated with each member within the member file view.

Chase
G

REVEALER TEST : vince.ust

← CHASE ID 6080580

Measure ID
MBRCHART
Client Ch
1202178156

Chart
Chase Info
Member Chases
Comments
Documents
Timeline
Audit Log

MEASURE=CDC

Search
1 of 2

Testing

Chase
Global Search

REVEALER TEST : vince.ust

MEMBER FILE: [MATILDA WARWICK](#)
DOB: 11/28/1955 Gender: F Member ID: 4100564 Member Key: 4999650

Select Next Action
GO
T

TEST
CHART LAKE MEMBER FILE
BASIC
CREATE NEW VIEW

| CHASE ID | PROJECT | CHASE STATUS | PAGES | PEND CODE | PEND STATUS |
|-------------------------|----------------|-------------------|-------|-----------|-------------|
| 6080580 | ChartLake_5.25 | Downloaded | 2 | | |
| 6080581 | ChartLake_5.25 | Waiting for chart | | | |
| 6080582 | ChartLake_5.25 | Waiting for chart | | | |

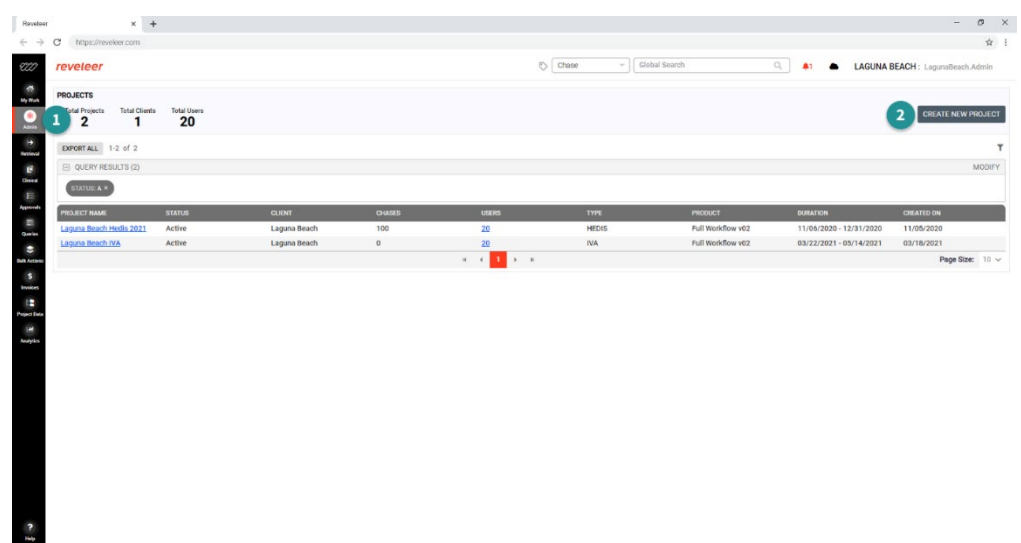
PEND CHASE(S)
ASSIGN CHASE(S)
UNASSIGN CHASE(S)
COPY CHART

Step-by-Step Guide

Projects

Chart Lake Project Setup

1. Locate Admin > Projects
2. Click Create New Project



3. Enter Project Name
4. Select Project Owner
5. Select Project Type: Chart Lake
6. Select Group
7. To finalize, click Save and Continue
8. To cancel, click Cancel

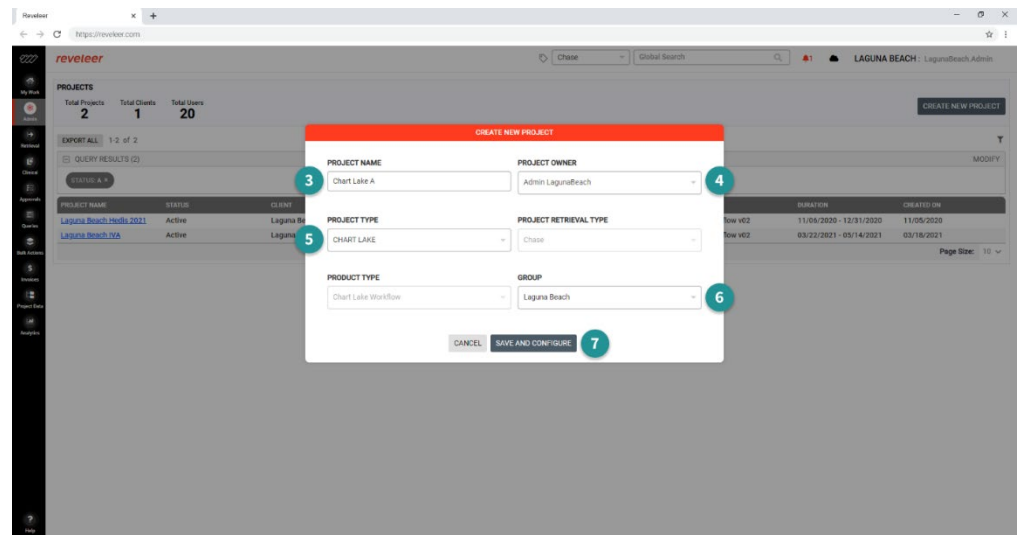


Chart Lake Project Settings Overview

1. Project Name: Edit Project Name
2. Set Project to Active or Inactive
3. Change Project Owner

The screenshot shows the 'PROJECT CHART LAKE A CONFIGURATION' page in the Revealer application. The page has a sidebar on the left with navigation icons. The main content area is titled 'Project Settings' and contains three sections: 'GENERAL SETTINGS', 'SET PROJECT STATUS', and 'PROJECT OWNER'. The 'GENERAL SETTINGS' section has a 'PROJECT NAME' field with the value 'Chart Lake A'. The 'SET PROJECT STATUS' section has a toggle switch for 'ACTIVE' (which is turned on) and 'INACTIVE'. The 'PROJECT OWNER' section has a dropdown menu with the value 'Admin Lagunabeach'. A 'SAVE' button is located at the bottom right of the settings area.

Chart Lake Data Load - Full

1. Select Project or Project ID
2. Select Load Type: Full

The screenshot shows the 'DATA LOAD' page in the Revealer application. The page has a sidebar on the left with navigation icons. The main content area is titled 'DATA LOAD' and contains a section for 'SELECT PROJECT', 'PROJECT ID', and 'SELECT LOAD TYPE'. The 'SELECT PROJECT' dropdown is set to 'Chart Lake A'. The 'PROJECT ID' field is set to '992'. The 'SELECT LOAD TYPE' dropdown is set to 'Full'. Below this section is a 'DATA IMPORT INSTRUCTIONS' section with a 'Member File*' field and a 'BROWSE' button. There are also 'RESET' and 'IMPORT' buttons at the bottom of the form.

3. Recommend, Download Instructions
4. Upload Member File
5. Click Import

DATA LOAD

The data load page lets you upload new or update your project's share and attribute data. To upload new data to a new project, choose Full as the load type. To replace existing data with a new upload, choose Admin Refresh as the load type. To add new data to an existing project, choose Incremental as the load type.

SELECT PROJECT **PROJECT ID** **SELECT LOAD TYPE**

Chart Lake A 592 Full

DATA IMPORT INSTRUCTIONS [Download Instructions](#)

We've put together a set of data requirements that you can access to get familiar with our upload requirements. Please download the attached instruction file to get the complete list of required fields and rules for your data upload. Please read each data requirements carefully and ensure that your files have the required data to avoid interruptions with your data upload.

Member File*

Chart_Lake_Member-Load-File.csv **BROWSE**

RESET **IMPORT**

6. Review Summary and Click Upload File

DATA LOAD

The data load page lets you upload new or update your project's share and attribute data. To upload new data to a new project, choose Full as the load type. To replace existing data with a new upload, choose Admin Refresh as the load type. To add new data to an existing project, choose Incremental as the load type.

SELECT PROJECT **PROJECT ID** **SELECT LOAD TYPE**

Chart Lake A 592 Full

DATA IMPORT INSTRUCTIONS [Download Instructions](#)

We've put together a set of data requirements that you can access to get familiar with our upload requirements. Please download the attached instruction file to get the complete list of required fields and rules for your data upload. Please read each data requirements carefully and ensure that your files have the required data to avoid interruptions with your data upload.

Member File*

Chart_Lake_Member-Load-File.csv **BROWSE**

RESET **IMPORT**

IMPORT SUMMARY

| TYPE | DETAILS |
|---------------------|---------------------|
| LOAD ID | 194546270 |
| PROJECT NAME | Chart Lake A |
| PRODUCT TYPE | Chart Lake |
| LOAD DATE | 11/04/2020 23:23:43 |
| TOTAL ERROR COUNT | 0 |
| TOTAL WARNING COUNT | 0 |
| VALIDATION STATUS | PASSED |

UPLOAD FILE

Member Query

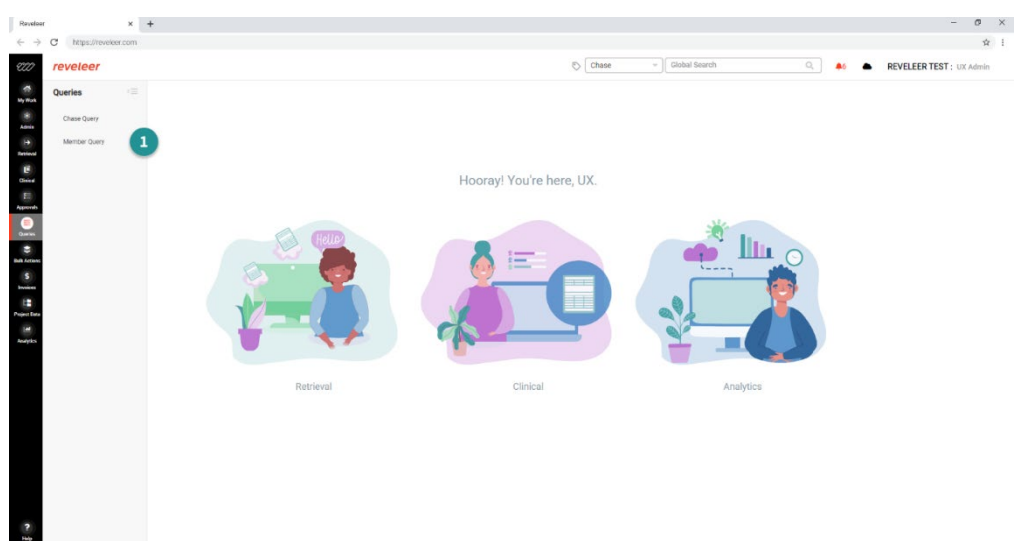
Member Query Page Overview

1. Results: These are your query results
2. Modify: Click here to modify your query
3. Table: The table displays Member ID, Member Key, First Name Last Name, DOB, Gender, Chases, Project Status

| MEMBER ID | MEMBER KEY | FIRST NAME | LAST NAME | DOB | GENDER | CHASES | STATUS |
|-----------|----------------|------------|-----------|------------|--------|--------|--------|
| 1263228 | 1235487455 | CRISTINA | SIMPSON | 09/17/2017 | M | 1 | Active |
| 3373364 | 65436465487 | SAUL | SIMPSON | 06/28/1996 | M | 1 | Active |
| 2945960 | 98544578464 | JONATHAN | SIMPSON | 02/18/1962 | F | 1 | Active |
| 2946117 | 541405478945 | KAY | SIMPSON | 11/17/1955 | F | 1 | Active |
| 2946168 | 48978410021 | IRS | SIMPSON | 07/29/1951 | M | 1 | Active |
| 2947288 | GHSLCJENGF | LOUISE | SIMPSON | 12/11/1984 | F | 2 | Active |
| 2947444 | 987994113565 | DOUG | SIMPSON | 03/27/1947 | F | 1 | Active |
| 2948092 | RL37L6W896 | JON | SIMPSON | 04/11/1952 | M | 1 | Active |
| 2949452 | 841546457KJ | MARTHA | SIMPSON | 05/19/1934 | M | 1 | Active |
| 2948860 | EW4D5887485 | VICKIE | SIMPSON | 07/10/2010 | F | 1 | Active |
| 2941872 | 10203KJAGSJ | DOUG | SIMPSON | 12/03/1964 | F | 1 | Active |
| 2949328 | DLJ0055485486 | SHELLEY | SIMPSON | 09/23/1976 | F | 1 | Active |
| 2941463 | Q5556GF49F89F | CLAUDIA | SIMPSON | 03/10/1983 | F | 1 | Active |
| 294783 | 56F54F4F4F5D95 | LISA | SIMPSON | 12/07/1945 | F | 1 | Active |
| 2945222 | 00DF5572DF54 | JEANNIE | SIMPSON | 12/07/1939 | M | 1 | Active |
| 2949492 | 5609F4G0D8FG | AMBER | SIMPSON | 05/22/1957 | F | 1 | Active |
| 2947231 | AL7805F4J54 | SONIA | SIMPSON | 12/30/1951 | F | 1 | Active |
| 294153 | 1234698795415 | JAMIE | SIMPSON | 07/11/1963 | F | 1 | Active |
| 4000448 | 6648DF4G4545 | MAGGIE | SIMPSON | 02/22/1953 | F | 2 | Active |
| 4001182 | RF6TBH4F525644 | OLIVER | SIMPSON | 12/28/1973 | F | 1 | Active |
| 4004158 | 56F8H4F58T | PALLINE | SIMPSON | 04/02/1962 | F | 1 | Active |
| 4007266 | 146F564F4F56 | MYRTLE | SIMPSON | 01/27/1964 | M | 1 | Active |
| 4008950 | 8H4G5GF4H6G8 | GORDON | SIMPSON | 12/28/1952 | F | 1 | Active |
| 4008721 | F4H6F5884H | ANDY | SIMPSON | 01/05/1949 | M | 1 | Active |
| 4008831 | 564687897TV | RACHAEL | SIMPSON | 09/15/1928 | F | 1 | Active |

Run Member Query

1. From Queries, click Member Query



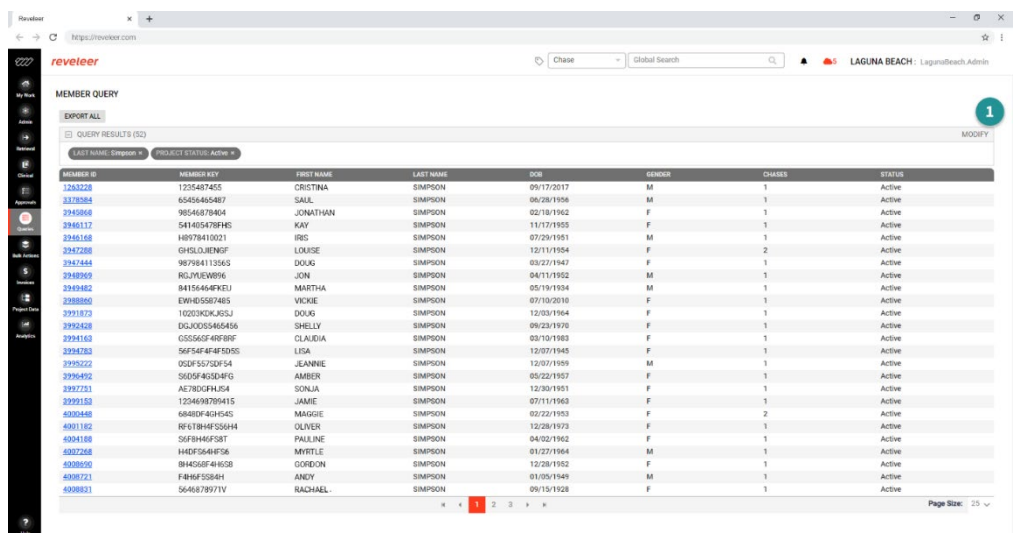
2. You will be prompted to enter Member search criteria. You can use any combination of the following: First Name, Last Name, DOB, Member ID, Member Key, and Project status
 - a. Project status defaults on Active projects but users can also search Archived, Inactive projects or search All
 - b. You can also search a specific project
3. Click Run Query

4. Results will display a list of members that can be accessed via their Member ID

| MEMBER ID | MEMBER KEY | FIRST NAME | LAST NAME | DOB | GENDER | CHARGES | STATUS |
|-----------|----------------|------------|-----------|------------|--------|---------|--------|
| 1263228 | 1255487455 | CRISTINA | SIMPSON | 09/17/2017 | M | 1 | Active |
| 3123384 | 64545454545 | SALIA | SIMPSON | 06/28/1994 | M | 1 | Active |
| 2945869 | 98546879464 | JONATHAN | SIMPSON | 02/18/1962 | F | 1 | Active |
| 2946117 | 541405478945 | KAY | SIMPSON | 11/17/1955 | F | 1 | Active |
| 2946168 | H8978410021 | IRS | SIMPSON | 07/29/1951 | M | 1 | Active |
| 2947288 | GH5LCJENGF | LOUISE | SIMPSON | 12/11/1954 | F | 2 | Active |
| 2947444 | 9879841123645 | DOUG | SIMPSON | 03/27/1947 | F | 1 | Active |
| 2948969 | RGJYUEW896 | JON | SIMPSON | 04/11/1952 | M | 1 | Active |
| 2949482 | 841564649EJ | MARTHA | SIMPSON | 05/19/1934 | M | 1 | Active |
| 2949860 | EW645587485 | VICKIE | SIMPSON | 07/10/2010 | F | 1 | Active |
| 2949872 | 1020304KJ65J | DOUG | SIMPSON | 12/03/1964 | F | 1 | Active |
| 2952428 | DGLJODS465456 | SHELLY | SIMPSON | 09/23/1976 | F | 1 | Active |
| 2954163 | GS556SF49F8RF | CLAUDIA | SIMPSON | 03/10/1983 | F | 1 | Active |
| 2954783 | 56F54F4F4F5D55 | LISA | SIMPSON | 12/07/1945 | F | 1 | Active |
| 2955222 | GGDF5G73DF34 | JEANNE | SIMPSON | 12/07/1959 | M | 1 | Active |
| 2956492 | 5655F40504F6 | AMBER | SIMPSON | 05/22/1957 | F | 1 | Active |
| 2957251 | AE78CGH4J54 | SONJA | SIMPSON | 12/30/1951 | F | 1 | Active |
| 2959153 | 1234698789415 | JAMIE | SIMPSON | 07/11/1963 | F | 1 | Active |
| 4000448 | 6848DF4G4545 | MAGGIE | SIMPSON | 02/22/1953 | F | 2 | Active |
| 4001182 | RP678H4F556H4 | OLIVER | SIMPSON | 12/28/1973 | F | 1 | Active |
| 4004188 | 56F8H4F58T | PAULINE | SIMPSON | 04/02/1962 | F | 1 | Active |
| 4007268 | H4DF3648F56 | MYRTLE | SIMPSON | 01/27/1964 | M | 1 | Active |
| 4008650 | 8H458F4H658 | GORDON | SIMPSON | 12/28/1952 | F | 1 | Active |
| 4008721 | F4H6F5584H | ANDY | SIMPSON | 01/05/1949 | M | 1 | Active |
| 4008831 | 564687897TV | RACHAEL | SIMPSON | 09/15/1928 | F | 1 | Active |

Modify Member Query

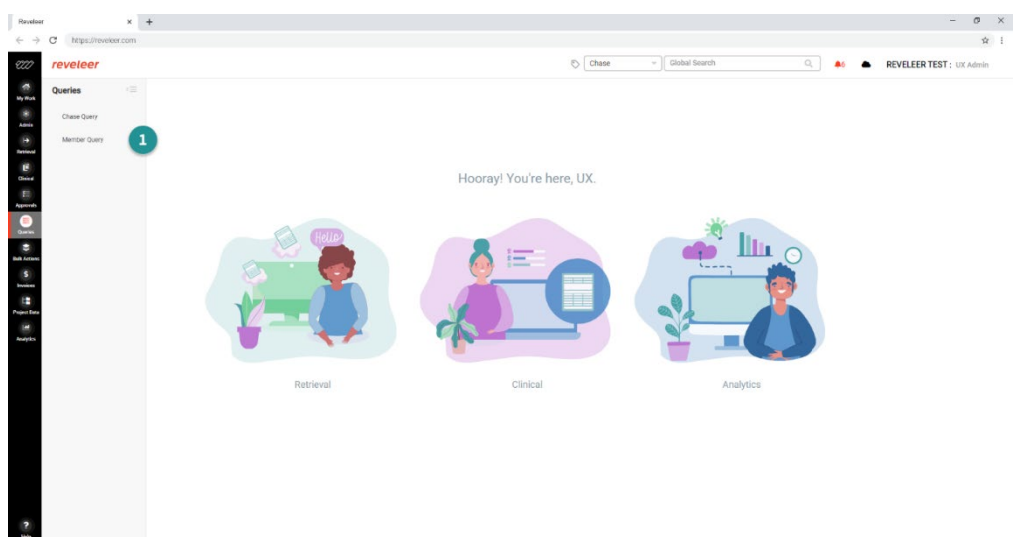
1. Click Modify located to the right of your query results



| MEMBER ID | MEMBER KEY | FIRST NAME | LAST NAME | DOB | GENDER | CHASES | STATUS |
|-----------|----------------|------------|-----------|------------|--------|--------|--------|
| 1263228 | 1255487455 | CRISTINA | SIMPSON | 09/17/2017 | M | 1 | Active |
| 3378384 | 65456465487 | SAUL | SIMPSON | 06/28/1958 | M | 1 | Active |
| 2945960 | 9854687864 | JONATHAN | SIMPSON | 02/10/1962 | F | 1 | Active |
| 2946117 | 5414054789H | KAY | SIMPSON | 11/17/1955 | F | 1 | Active |
| 2946168 | 48978410021 | IRS | SIMPSON | 07/29/1951 | M | 1 | Active |
| 2947288 | GHSLUJENGF | LOUISE | SIMPSON | 12/11/1954 | F | 2 | Active |
| 2947444 | 987984113565 | DOUG | SIMPSON | 03/27/1947 | F | 1 | Active |
| 2948990 | RL7P6CW86 | JON | SIMPSON | 04/11/1952 | M | 1 | Active |
| 2949452 | 841544647KXJ | MARTHA | SIMPSON | 05/19/1934 | M | 1 | Active |
| 2958860 | EWHD5887485 | VICKIE | SIMPSON | 07/10/2010 | F | 1 | Active |
| 2991873 | 10203KCKJGSL | DOUG | SIMPSON | 12/03/1964 | F | 1 | Active |
| 2992428 | DLJXJDSAS85456 | SHELLY | SIMPSON | 09/23/1976 | F | 1 | Active |
| 2994163 | OS556GF46F98F | CLAUDIA | SIMPSON | 03/10/1983 | F | 1 | Active |
| 2994763 | 56F54F4F4F5055 | LISA | SIMPSON | 12/07/1945 | F | 1 | Active |
| 2995222 | 00DF557SDFS4 | JEANNE | SIMPSON | 12/07/1959 | M | 1 | Active |
| 2996492 | 560GF4G5D4FG | AMBER | SIMPSON | 05/22/1957 | F | 1 | Active |
| 2997231 | AC780GFFJL54 | SOLIA | SIMPSON | 12/30/1951 | F | 1 | Active |
| 2999153 | 1234698789415 | JAMIE | SIMPSON | 07/11/1963 | F | 1 | Active |
| 4030448 | 6848DF4G4545 | MAGGIE | SIMPSON | 02/22/1953 | F | 2 | Active |
| 4031162 | RF6T8H4F556444 | OLIVER | SIMPSON | 12/28/1973 | F | 1 | Active |
| 4034188 | 56F8H46F58T | PAULINE | SIMPSON | 04/02/1962 | F | 1 | Active |
| 4037246 | HA6F5846F58 | MAYTLE | SIMPSON | 01/27/1964 | M | 1 | Active |
| 4038650 | 8H4G5GF4H6G8 | CORDON | SIMPSON | 12/28/1952 | F | 1 | Active |
| 4038721 | F4H4F5584H | ANDY | SIMPSON | 01/05/1949 | M | 1 | Active |
| 4038821 | 564687897TV | RACHAEL | SIMPSON | 09/15/1928 | F | 1 | Active |

Access Member File

1. From Queries, click Member Query



2. You will be prompted to enter Member search criteria. You can use any combination of the following: First Name, Last Name, DOB, Member ID, Member Key, and Project status
 - a. Project status defaults on Active projects but users can also search Archived projects or search All
 - b. You can also search a specific project
3. Click Run Query
4. To access Member File, click Member ID

| MEMBER ID | MEMBER KEY | FIRST NAME | LAST NAME | DOB | GENDER | CHASES | STATUS |
|-----------|----------------|------------|-----------|------------|--------|--------|--------|
| 1253228 | 1253487423 | CRISTINA | SIMPSON | 09/17/2017 | M | 1 | Active |
| 3133364 | 65456405487 | SAIL | SIMPSON | 06/28/1956 | M | 1 | Active |
| 2945868 | 98546878464 | JONATHAN | SIMPSON | 02/18/1962 | F | 1 | Active |
| 2946117 | 5414054789H5 | KAY | SIMPSON | 11/17/1955 | F | 1 | Active |
| 2946168 | H8979413021 | IRG | SIMPSON | 07/29/1951 | M | 1 | Active |
| 2947288 | 045030698F | LOUISE | SIMPSON | 12/11/1954 | F | 2 | Active |
| 2947464 | 987994113565 | DOLG | SIMPSON | 03/27/1947 | F | 1 | Active |
| 2948969 | RGJYEW896 | JON | SIMPSON | 04/11/1952 | M | 1 | Active |
| 2949362 | 84156464FKEU | MARTHA | SIMPSON | 05/19/1934 | M | 1 | Active |
| 2949860 | EWHE5587485 | VICKIE | SIMPSON | 07/19/2010 | F | 1 | Active |
| 2951872 | 1020306305J | DOLG | SIMPSON | 12/03/1964 | F | 1 | Active |
| 2952428 | DGLJ005460456 | SHELLY | SIMPSON | 06/23/1970 | F | 1 | Active |
| 2951163 | 055565F49F89F | CLAUDIA | SIMPSON | 03/10/1983 | F | 1 | Active |
| 2951783 | 56F54F4F4F5D55 | LISA | SIMPSON | 12/07/1945 | F | 1 | Active |
| 2955222 | 05DF5570F54 | JEANNE | SIMPSON | 12/07/1955 | M | 1 | Active |
| 2956492 | 5655F4G554F6 | AMBER | SIMPSON | 05/22/1957 | F | 1 | Active |
| 2957251 | AE78DGF454 | SONJA | SIMPSON | 12/30/1951 | F | 1 | Active |
| 2959153 | 1234698789415 | JAMIE | SIMPSON | 07/11/1963 | F | 1 | Active |
| 4000488 | 6848DF484545 | MAGGIE | SIMPSON | 02/22/1953 | F | 2 | Active |
| 4001182 | 8618784F5594H | OLIVER | SIMPSON | 12/28/1975 | F | 1 | Active |
| 4004188 | 56F8H4F58T | PAULINE | SIMPSON | 04/02/1962 | F | 1 | Active |
| 4007268 | H4EDF5648F56 | MYRTLE | SIMPSON | 01/27/1964 | M | 1 | Active |
| 4008650 | 8H458F48658 | GORDON | SIMPSON | 12/28/1952 | F | 1 | Active |
| 4008721 | F486F5584H | ANDY | SIMPSON | 01/05/1949 | M | 1 | Active |
| 4008821 | 564687897TV | RACHAEL | SIMPSON | 09/15/1928 | F | 1 | Active |

| MEMBER FILE: MARGE SIMPSON | | | | | | | |
|--|------------------|------------|---------|------------|-------------------------------|------------------|-------------------|
| DOB: 05/15/2018 Gender: F Member ID: 1263113 Member Key: 469106JHE102020 | | | | | | | |
| Select Next Action | | | | | | | |
| BASIC CREATE NEW VIEW | | | | | | | |
| CHASE ID | CLIENT CHASE KEY | PROJECT | MEASURE | CREATED | PROVIDER | CHASE COMPLIANCE | SAMPLE COMPLIANCE |
| 1355560 | 11473 | 2020 Hds 1 | DEV | 07/25/2019 | ProvFirstName307 ProvLast3... | NC | NC |
| 1355738 | 11358 | 2020 Hds 1 | WTS | 07/25/2019 | ProvFirstName307 ProvLast3... | NC | NC |

Member File Overview

- 1. Member Details: This shows you the member details such as Name, DOB, Gender, Member ID and Member Key
- 2. Table: The table displays all chases associated to that member. You can see Chase ID, Client Chase Key, Project, Measure, Created, Chase Status, Provider, Location, Chase Compliance and Sample Compliance
- 3. Next Action: Use the select next action dropdown to export, pend, assign, or unassign applicable chases
- 4. Custom View: Show or hide the columns you want to see for members with Active and Archived projects

Revealer

Chase

Global Search

REVEALER TEST - UX Admin

MEMBER FILE: MARGE SIMPSON

DOB: 09/15/2019 Gender: F Member ID: 1263113 Member Key: 459106_HEZHS2028

Select Next Action

CREATE NEW VIEW

| CHASE ID | CLIENT CHASE KEY | PROJECT | MEASURE | CREATED | PROVIDER | CHASE COMPLIANCE | SAMPLE COMPLIANCE |
|----------|------------------|--------------|---------|------------|-------------------------------|------------------|-------------------|
| 1455660 | 11473 | 2020 Hedis 1 | DEV | 07/25/2019 | ProvFirstName307 ProvLast3... | NC | NC |
| 1455298 | 11358 | 2020 Hedis 1 | WTS | 07/25/2019 | ProvFirstName307 ProvLast3... | NC | NC |

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FAQ

What workflows are triggered upon import of a data load file for a Chart Lake project?

For each entry in the data load file, a MBRCHART record is created in the Reveleer platform. These will remain in a “Waiting for Chart” status until a corresponding document is uploaded and attached.

How will charts be associated with their corresponding member record in Reveleer?

After specifying the file name during data load via the ChartFileName column, when the document is uploaded via Bulk Upload or ingested via SFTP connection, Reveleer will automatically associate the document to the corresponding member record based on the file name.

What if I have multiple files to upload for a member?

During data load, you can add multiple rows for the same member with different ChartFileName values so that multiple charts can be automatically attached to their respective MBRCHART record.

Can I specify additional information about the charts that will be uploaded?

During data load, the ChaseTag column can be used to tag specific charts and can be surfaced in the Reveleer platform. For example, if you want to specify a chart contains information for a CDC measure, add “MEASURE=CDC” as a value in the ChaseTag column when creating the data load file.