



GuidingCare® Release Notes

Care Management Enhancements

Version 8.16 | September 2021

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Care Plan Enhancements

Team Care Plan has a completely new user design! We have uplifted every tab to provide a more accessible experience. Team Care Plan now supports Care Plan Overview, Care Plan Strengths, Care Plan Barriers and Care Plan Review as separate tabs. As previously only offered in Mobile Clinician, we have added single-click care planning to GuidingCare in 8.16.

Single-Click Care Planning

Care planning in GuidingCare just got a lot easier with single-click care planning. Add and save an opportunity, goal, goal group, intervention (OGI) directly to the member. Search for an OGI bundle by condition, opportunity, goal, goal group or intervention using keywords.

Configuration Changes: No Schema/Logic Changes: Yes Issue Key: 355, 3167, 5299, 64

Add OGIs to Favorites

Add OGIs to your favorites list for easier care planning. While adding a care plan, search results are sorted by favorites, then recently used, followed by OGI details, which do not belong to either category. Most used favorites appear at the top of the list.

Configuration Changes: No Schema/Logic Changes: No Issue Key: 64

Care Plan Overview Enhancements

OGI Tile View

OGI records now display in a tile view instead of a grid view to represent member information. The OGI tiles can also be sorted.

Configuration Changes: No Schema/Logic Changes: No Issue Key: 63, 66

Action Menu

While the options in the Action menu remain the same as before, we have updated the placement of the options and selection checkboxes on the tiles.

Configuration Changes: No Schema/Logic Changes: No Issue Key: 1408

New and Improved Filters

Explore our new and improved filter design in Care Plan Overview:

- Each field is clearly labeled for enhanced accessibility.
- Set up Care Plan Overview to automatically filter by a specific category by default.
- Easily see and manage applied filters:
 - Category - Recommended/Current/Deleted/Completed
 - Status - New/Open and so on
 - Start Date - Start Date
 - Target Date - Target Date
 - Search By & Search Text - Goal/Intervention/Opportunity/Script Name
 - Select By Assigned Owner - Assigned Owner(s)

Configuration Changes: No Schema/Logic Changes: No Issue Key: 389, 751, 354

Redesign of Care Plan Strengths/Care Plan Barriers/Care Plan Review

We have moved the Care Plan Barriers, Care Plan Strengths and Care Plan Review sections to separate sub-tabs within Team Care Plan. Based on the usage data collected, we have redesigned these grids to show the data in a more impactful way. The most important details are available as header columns and all additional information can be expanded/collapsed accordingly.

- When you select a record or records in the Care Plan Strengths grid, the Edit and Bulk Remove options display.
- When you select a record or records in the Care Plan Barriers grid, the Edit, Bulk Remove, In Progress and Resolve/Complete options display.
- The Care Plan Review sub-tab displays the following filters: Type of Date (Referred Date/Acknowledged Date radio buttons), From Date, To Date, Status (Pending/Closed/Acknowledged/All Status radio buttons), Search icon and Refresh button.

Configuration Changes: No Schema/Logic Changes: No Issue Key: 387, 352, 388, 351, 353, 540, 2496

Add Manual Care Plan and Manual Configuration Data in Add Care Plan Section

Although not preferred over single-click care planning, you can still manually add a new care plan for a member with the Add Manual Care Plan option and we've made it much easier. We have also enhanced this page with OGI bundles to speed up the process. You can also add the manually created care plan to your favorites.

Configuration Changes: No Schema/Logic Changes: No Issue Key: 3642, 65, 4958, 2430, 2428

Edit Care Plan

The Edit Care Plan page has also been enhanced with OGI bundles, as described above. Edit a care plan by simply clicking Select on the tile. You will see new helper text on this page to guide you through the editing process. Eligibility now displays above the Condition, Opportunity, Goal Group and Goal fields and fields have been regrouped and adjusted for an enhanced user experience.

Configuration Changes: No Schema/Logic Changes: No Issue Key: 3643, 2426

Validation of Fields in Add/Edit Care Plan Window

If you've missed any mandatory fields while adding or editing a care plan, all the missed fields will turn red with a message to enter mandatory information.

Configuration Changes: No Schema/Logic Changes: No Issue Key: 2431

Programs and Required Activities with Eligibility Issues

Programs

Now GuidingCare displays an alert to identify programs with eligibility issues visually on the grid and tile views of Programs. For programs where the eligibility has been dropped in the database, you will now see in tile view, a message "Eligibility has an issue" in red appears on the tile. In grid view, a red icon appears.

Configuration Changes: No Schema/Logic Changes: Yes Issue Keys: 370, 369, 368, 80, 75, 1776, 1638, 74, 73, 72

Required Activities

Identify the required activities with eligibility issues visually on the Required Activities tab, My Calendar and Outstanding Activities tab. These required activities cannot be performed/edited/scheduled until you have resolved eligibility issues in the related programs.

Configuration Changes: No Schema/Logic Changes: No Issue Keys: 3955, 3953, 4931, 349

Eligibility Reconciliation

We have created a new link for Eligibility Reconciliation under the Manage menu that allows you to view members assigned to you with the details on their programs where the eligibility has been dropped. You can view the following sortable columns in Manage ▶ Eligibility ▶ Reconciliation:

- | | |
|--------------------|----------------------|
| ▪ Last Name | ▪ First Name |
| ▪ Member ID | ▪ Eligibility |
| ▪ Program Name | ▪ Program Start Date |
| ▪ Program End Date | ▪ Status |

View the following additional non-sortable information when you expand the row:

- | | |
|--------------|--------------|
| ▪ Created By | ▪ Created On |
| ▪ Updated By | ▪ Updated On |

Configuration Changes: No Schema/Logic Changes: No Issue Key: 1407

Filter Members in Eligibility Reconciliation

Use the following filters to search for members in Eligibility Reconciliation:

- Primary Care, Care Team or All Assigned radio buttons
- Member Name - Enter text such as first name/last name/first name + middle name + last name/last name + middle name + first name

- Filtering with middle name/first name + last name and last name + first name is non-functional
- Member ID filters the same way as the Quick Search value
- Program Start Date/Program End Date
- Search button
- Clear Filters link

Configuration Changes: No Schema/Logic Changes: No Issue Key: 2627

Expand/Collapse and Export the Grid

Expand All or Collapse All the rows in the grid. Export all the rows to an Excel file.

Configuration Changes: No Schema/Logic Changes: No Issue Key: 2628

Open Programs Directly from Eligibility Reconciliation

Click the link in the Last Name column of the member to open the Members ▶ Programs page and verify eligibility issues.

Configuration Changes: No Schema/Logic Changes: No Issue Key: 4101

Removed Eligibility from Visits, Diagnosis and Medications

Since eligibility should not impact a member's visits, diagnosis or medications, eligibility information will no longer be required in the following sections:

- Medications
- Diagnosis
- Manual Visits

Configuration Changes: No Schema/Logic Changes: No Issue Key: 3471, 2630, 1780, 2629, 730, 2172, 350

Enhancements Related to Manage Application Configurations

In 8.16, we have enhanced the following configurations under the Manage Application Configurations section to provide a better user experience.

Resetting Required Activities Configuration

We have added a new configuration to Manage Application Configurations: "Ability to reset required activities attached to programs". If enabled, you can reset required activities by either choosing to continue a previous program or restart the program with a new list of required activities for manually added programs. You will also have a new set of configured required activities each time a Clinical Program/Program is created for a member to track each instance of a Clinical Program/Program along with the activities required and completed by a member while accessing the Clinical Program/Program multiple times.

Configuration Changes: Yes Schema/Logic Changes: No Issue Key: 553, 1310, 554

Configuring Service Plan Code Types

We have added a new configuration under Manage Application Configurations: "Service Plan Code Types". Configure the default code type during service plan creation and search for the Service Description. The Service Plan description search is a keyword-based search that includes CPT, HCPCS, Service Plan Category, Service Class, Medication Codes and Revenue Codes. This enhancement improves the performance of searching with multiple code types within a shorter period of time.

Configuration Changes: Yes Schema/Logic Changes: No Issue Key: 1623

Sort Member's Eligibility By Product Type

Clients now have the option to sort members' eligibilities by product type (for example: medical or dental). This enhancement will help prevent providers from selecting the wrong eligibility while creating an authorization request when a hierarchy of multiple eligibility levels exists. This configuration can be enabled or disabled on the back end by Altruista Health.

Configuration Changes: No Schema/Logic Changes: No Issue Keys: 1567

Browser Health Check

Check your browser's compatibility with GuidingCare in 8.16! We have introduced a new feature called Browser Health Check, which is located in the bottom right corner of the application. Identify any hurdles in terms of loading any page or carrying out any member-level transactions in case of technical or network-related difficulties. Browser Health Check alerts you if there are browser-related issues that require immediate action. Self-check for any issues by clicking the link, which displays a pop-up with all parameters. Parameters checked include Popup window, Cookies, Screen Resolution and Browser Version. The pop-up displays a validation message specific to the case and instructions to resolve it.

Configuration Changes: No Schema/Logic Changes: No Issue Keys: 2440

Draft Column Under Documents Section

We have added a Draft column under the Activity Record ▶ Documents section to improve the process of reviewing draft letters in SmartComm. Under this column, click the green envelope icon to open SmartComm for reviewing.

Configuration Changes: No Schema/Logic Changes: Yes Issue Key: 34738

Add Strengths and Barriers Placeholders in Full Care Plan

While exporting Full Care Plan to Print Queue/Save and Print Queue/Export to Word, you can view two new placeholders to accommodate the Strengths and Barriers grids in Full Care Plan and display the implemented changes related to Status and Priority. The Status and Priority columns for both Care Plan Barriers and Care Plan Strengths are now available in the SmartComm letter template.

Configuration Changes: Yes Schema/Logic Changes: Yes Issue Key: 144618, 4492

Search Record Based on Member's Middle Name

Although you can already search for member records using the member's first name and last name, you can now search using the member's middle name (first name + middle name + last name). This enhancement is only applicable to the Member Quick Search section.

Configuration Changes: No Schema/Logic Changes: Yes Issue Key: 22-298

Preferred Pronouns

The new Preferred Pronouns field in the Member Details section provides flexibility to members to choose how they want to be addressed. Select any one of the following options:

- She/Her/Hers
- He/Him/His
- They/Them/Theirs
- Other: Please specify

Configuration Changes: Yes Schema/Logic Changes: Yes Issue Key: 329

New Values in Gender and Communication Impairment

Select from newly introduced values in the Gender and Communication Impairment drop-down lists. These values were created to support all gender communities and communication impairment categories.

The Gender drop-down list displays the following additional values:

- Transgender Female/Transgender Women
- Two-spirit/Genderqueer/Gender Fluid
- Non-binary/Gender Non-Conforming
- Another identity
- Transgender Male/Transgender Man
- Intersex
- X
- Decline to answer

New values in the Communication Impairment drop-down list include:

- Stroke
- Unspecified Communication Impairment
- Colored Font Needed
- Communication Device
- Braille Needed
- Interpreter Needed

Configuration Changes: No Schema/Logic Changes: No Issue Key: 330

Updated Logo

We have updated the GuidingCare logo to “Altruista Health, A HealthEdge Company.” The home page footer of the application also displays our new logo.

Configuration Changes: No Schema/Logic Changes: No Issue Key: 366, 2688

Add Interventions to an Existing Goal

You can now add interventions for care plans already in a Recommended or Current status with an existing combination of opportunities, goals and goal groups. Select the Add Intervention option from the context menu to add interventions for a current care plan and add multiple interventions to an existing goal.

Configuration Changes: No Schema/Logic Changes: No Issue Key: 3243, 5164

Display Custom Fields in Script Activity Summary

While viewing the script response information in the Activity Summary section, you can now see custom fields captured for the Activity Type displaying along with the standard details like General Activity Summary. The attributed custom fields appear in the Script Activity Summary.

Configuration Changes: No Schema/Logic Changes: No Issue Key: 3177, 3855

Merge Opportunities in Care Plan from Scripts

If care plans triggered from scripts have two or more similar opportunities, GuidingCare will automatically merge these opportunities in the care plan.

Configuration Changes: No Schema/Logic Changes: No Issue Key: 152039

Export to Excel Functionality in Worklog Manager

Export a report to Excel in Worklog Manager for Care Management, Utilization Management and Appeals and Grievances.

Configuration Changes: No Schema/Logic Changes: No Issue Key: 3464, 3463, 3242

Enter Parameter Values in Health Indicators

Add or edit Parameter values for a member in the Health Indicators section without being forced to edit values for all parameters. GuidingCare displays these indicators only when there is a value present for a member. If no value exists, GuidingCare will not display the indicators with empty values.

Configuration Changes: No Schema/Logic Changes: No Issue Key: 752

User Interface Design Update on Care Management Grids and Add/Edit Service Interruption

Check out our new grid design throughout Care Management:

- New color and border styles
- New headers and row styles
- Expandable rows and paging updates

We have also updated and enhanced the UI of the Service Interruptions pop-up for Member Details in 8.16:

- Improved filters
- Added instructional text
- Expandable rows
- Inline editing with Save button instead of Update

Configuration Changes: No Schema/Logic Changes: No Issue Key: 4326, 1709, 1632

Decimal and Dollar Currency Symbol

Amount fields throughout GuidingCare will consistently display up to two decimal places even if the data is received as a whole number (for example, 165 will display as 165.00). In addition, a US dollar sign (\$) will now appear as a prefix to the amount.

Configuration Changes: No Schema/Logic Changes: No Issue Keys: 1731

Out-of-Area Federal Employee Program (FEP) Members

We are now integrated with the Federal Employment Management System (FEMS), so you can automatically search for out-of-area FEP members in the Authorization Portal and automatically add the member while creating a new authorization. This allows out-of-area FEP members to be serviced by health plans in GuidingCare and Authorization Portal. Integration is triggered when you search using the specific FEP member ID format (an ID starting with "R" and followed by 8 digits). More than one record may be returned in search results using this ID. Once you select the correct member, the system will either create the member in GuidingCare or update the member details with the latest data behind the scenes.

If you are interested in this feature, please contact your account management team.

Configuration Changes: No Schema/Logic Changes: No Issue Keys: 1157, 1156, 1155, 1747, 1255

Left Navigation Panel

We updated the design of the left navigation panel. The collapsible menu allows you to make the most of your real estate on screen.

Configuration Changes: No Schema/Logic Changes: Yes Issue Key: 5521

Provider Search

We enhanced the Advanced Search throughout GuidingCare.

Advanced Search

We've added an application-level configuration to choose which provider search view fits your needs. The Flat View retains the existing functionality of the Advanced Search. In 8.16, we are introducing the Expand View to provide more flexibility to quickly find providers.

Improvements as part of Expand View:

- Review the search criteria you've entered using the Show Search Fields toggle.
- View selected/deselected items from the Specialty and Eligibility sections in chips.
- Clear search text within a particular section.
- View all search fields vs. fields with search text/input.
- Search providers with and without a contract.
- View Provider Name, Code, NPI, Tax ID, Network Name, Primary Address details, Premium Provider and Accepting Patients in the search results.
- Expand a provider row to view additional addresses, network contracts and identifiers in the search results.

Configuration Changes: No Schema/Logic Changes: Yes Issue Key: 131215

An illustration of a white rocket with orange fins launching upwards, leaving a white trail of smoke. The background is a blue sky with several white, fluffy clouds. The rocket is positioned on the left side of the page, and the clouds extend across the bottom of the header area.

GuidingCare® Release Notes

Highlights

Version 8.16 | September 2021

Care Management

Single-Click Care Planning

We have transformed care planning in GuidingCare with our new opportunity, goal and intervention (OGI) bundles. This new experience allows you to select from predefined OGI bundles. The care plan will display in a tile view, making the OGI bundles easy to view and great for users who prefer a keyboard instead of a mouse. Quickly select from a group of your favorite OGI bundles and then customize them for the specific member's use. You can still create manual OGIs, but we recommend our new bundle feature for speed and efficiency.

Eligibility Reconciliation

We made changes to identify members who have issues surrounding their eligibility. In the past, eligibility issues caused problems in several sections within Care Management.

With 8.16, several of these areas have been addressed. Eligibility information will no longer be required in the following sections:

- Medications
- Diagnosis
- Manual Visits

Required activities will now display an alert when they are attached to a program that requires eligibility information be updated.

Appeals and Grievances

Healthcare appeals and grievances are a complex, multi-level process that is highly regulated and can be different across different types of healthcare, types of insurance and at the various event levels. Over the past 12 months, Altruista Health has taken the necessary steps to improve process efficiency, ensure regulatory compliance and resolution timeliness to meet the complex needs and variations in this process.

In earlier releases, the Appeals and Grievance module introduced level toggling, packets, packet logs, complaint logs, AOR and WOL tracking and enhanced turnaround time configuration. In addition, updates were made to Worklog Manager, MD Review Activities and InterQual integration.

The 8.16 release consists of existing features plus many new features, configurations and an updated user interface. The new UI is designed to create an organized and efficient user experience that empowers you to use these features to their fullest.

Some of the new features and configurations are listed below:

Complaint Template

Configure Appeals and Grievances complaint templates by eligibility and template fields by level. The template has been broken into multiple accordions/sections, which allows you to add custom fields to specific sections.

CMS-Regulated Fields

Two new standard fields are available to meet CMS regulations:

- Sponsor Appealed ALJ Decision
- Level of Service

Show/Hide Logic

Introduced show/hide logic to reveal sub-sections and fields based on values selected in the main field. This simplifies each screen by showing only the fields that need to be entered based on previous choices, creating a more streamlined user experience.

Complaint Status Reason

A new field, Status Reason, has been added. Status Reason can be used to provide more details about the complaint status selected.

Notes

We have added section-specific note descriptions. When the section-specific note is saved, it will also show in the Notes page with the note type associated to the section.

Mark all notes as viewable by Internal Users Only or All Users.

Linked Internal Authorization Fields

We have added 5 additional fields to display with linked internal authorizations.

External Authorization Fields

We have added 5 additional fields to display for data input with external authorizations.

Claim Information

Add linked internal and external claim information.

User Interface

We have taken steps to make the module more accessible:

- Larger text
- Use the Tab key to navigate fields

Provider Search

We enhanced the Provider Quick Smart Search in the Utilization Management module and the Provider Advanced Search throughout GuidingCare.

Quick Search

- We've Included additional columns, Network Status (PAR) and Contract in the search grid.
- We've also added Contract and Contract Status to Quick Search results to choose providers based on network.

Advanced Search

We've added an application-level configuration to choose which provider search view fits your needs. The Flat View retains the existing functionality of the Advanced Search. In 8.16, we are introducing the Expand View to provide more flexibility to quickly find providers.

Improvements as part of Expand View:

- Review the search criteria you've entered using the Show Search Fields toggle.
- View selected/deselected items from the Specialty and Eligibility sections in chips.
- Clear search text within a particular section.
- View all search fields vs. fields with search text/input.
- Search providers with and without a contract.
- View Provider Name, Code, NPI, Tax ID, Network Name, Primary Address details, Premium Provider and Accepting Patients in the search results.
- Expand a provider row to view additional addresses, network contracts and identifiers in the search results.

Utilization Management and Authorization Portal

Searching for out-of-area members just became easier! The GuidingCare Utilization Management module and Authorization Portal seamlessly integrate with the Federal Employment Management System (FEMS) to provide real-time Federal Employee Program (FEP) out-of-area member identification and information transfer. This feature improves efficiency by decreasing administrative costs and time.

If you are interested in this feature, please contact your account team.

Mobile Clinician

We are unveiling new features to make care planning in the field much easier. If you visit a member frequently, you can pin member cards to the My Members page. This provides easy access to members' information and helps case managers manage their workload.

Design

We are introducing a collapse/expand design on the left navigation menus in the Care Management, Population Health, Appeals and Grievances, and Utilization Management modules. The left navigation took up a lot of space on the page, making it difficult to work through large grids and complex workflows. Allowing you to collapse the grids provides you more real estate on the page and improves the overall user experience.

Browser Health Check

Check your browser's compatibility with GuidingCare in 8.16! We have introduced a new feature called Browser Health Check, which is located in the bottom right corner of the application. Identify any hurdles in terms of loading any page or carrying out any member-level transactions in case of technical or network-related difficulties. Browser Health Check alerts you if there are browser-related issues that require immediate action. Self-check for any issues by clicking the link, which displays a pop-up with all parameters. Parameters checked include Pop Up Windows, Cookies, Screen Resolution and Browser Version. The pop-up displays a validation message specific to the case and instructions to resolve it.

Interoperability

We've added 12 new services to our API Suite to support patient access to FHIR and USCDI defined resources. These REST services will allow health plans to retrieve GuidingCare data in real time to support patient access.

- **GET /Member/Detail** - Retrieves the member details, including member identifiers and demographic information.
- **GET /Member/Caregiver** - Retrieves the caregivers listed for a member.
- **GET /Member/Family** - Retrieves the related family members for a given member.
- **GET /Member/AdvanceDirective** - Retrieves the advance directives for a given member.
- **GET /Member/ConsentForm** - Retrieves the consent forms for a given member.
- **GET /CarePlan** - Retrieves the care plans for a given member.
- **GET /Member/Appointment** - Retrieves the appointments for a given member.
- **GET /Member/Referral/SDOH** - Retrieves the SDOH referrals on a member's record.
- **GET /Member/AllergyIntolerance** - Retrieves manually entered allergy information on a member's record.
- **GET /Member/HealthIndicators** - Retrieves the health indicators on a member's record.
- **GET /Member/Medication/Manual** - Retrieves the manually entered medications on a member's record.
- **GET /Member/Document** - Retrieves all the documents attached to a given member's record.

More details are available on [GuidingCare's Developer Portal](#).

Application Programming Interface (API)

Appeals and Grievances Services

We have updated our Complaint API suite to incorporate the many new features added to the complaint template configuration.

New Services

We have added 7 new services to our API suite across Care Management and Utilization Management.

- Create Pharmacist Activity on a Member (POST /Activity/Pharmacist v2)
- Create a New Authorization (POST /Authorization v2)
- Add a New Service Line to an Authorization (POST /Authorization/ServiceLine v2)
- Update Service Line for an Authorization (PUT /Authorization/ServiceLine v2)
- Retrieve Claim Details (GET /Claim/{claimNumber}/Detail v2)
- Retrieves Assessment Template (GET /Assessment/Template v2)
- Assessment Submission (POST /Assessment v2)

Service Deprecation & Retirement Notice

As we continue to release new APIs, we will be deprecating and retiring older versions of our APIs. In 8.16, we are deprecating 11 services retiring 13 services in version 0. Version 2 of these services will continue to serve our customers' needs. For the deprecated services, we encourage all our clients to start scheduling their upgrade and migration to the latest versions.

Find the full set of changes on [GuidingCare's Developer Portal](#).

Configuration Management

There is now easier management of classifications with new options to download, assign/unassign, active/inactivate records, etc.

Aunt Bertha

Use Aunt Bertha to search for community service providers, create referrals and receive status updates from providers without leaving GuidingCare!

COMING SOON

Member Portal

An all-new look is coming soon to Member Portal! Not only are we refreshing the design, but we are taking major strides to make it more responsive to the needs of your members, including those who may have vision or mobility challenges:

- Updating color and contrast to improve readability
- Making screens fully readable using screen reader technology for audio and braille support
- Enhancing the navigation menu design
- Replacing less accessible My Calendar with My Appointments list view
- Making the portal more responsive to the needs of your member base

We are working closely with Accessible360 to ensure the Member Portal conforms to industry-best accessibility standards.

For more information about the Member Portal, please contact your Account Management Team.