ENRL RECON SYSTEM

User’s Manual

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Rapid Response Team, UnitedHealthcare

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Preface

Welcome to Version 0.1 of ERNL RECON SYSTEMS User’s Manual.

This user’s manual includes the information that you need to work with ERNL RECON SYSTEMS (ERS) applications effectively. It contains detailed information about the following:

- Overview and reference information
- How to navigate through ERS applications windows
- How to submit ERS applications programs, reports, and listings.

This preface explains how this user’s guide is organized and introduces other sources of information that can help you

Document Release Notes

Project: ENRL RECON SYSTEM

Document Details

Name	Version no.	Description
ENRL RECON SYSTEM User's Guide	**Version 0.1**	This is the initial draft user guide for the Enrolment Reconciliation System application. The user guide describes various processes on how to create and review various cases to

Revision Details

Author:

Action Taken	Date	Author	Description
Initial draft user manual is created	09.06.2017	Ramani Behera	The initial draft user manual was delivered. The Maintenance and Reports chapter was not covered.

Reviewer:

Action Taken	Date	Reviewer	Description
The initial review comments were provided	09.06.2017	Cristella Greene	Overall comments with respect to template, technical accuracy, structure and formatting of the user manual suggested.
Secondary review comments are available	09.21.20107	Cristella Greene	The details review comment on the structure and presentation of the information

Approver:

Action Taken	Date	Approver	Description

About this Guide

Purpose

The ENRL RECON SYSTEM User's Manual and the software references explained in it are designed and developed for educating Enrolment Recompilation System (ERS) users to work on the ENRL RECON SYSTEM web application. Users can refer to, analyze, and follow the instructions and guidelines while working on the ERS application. This manual explains the details about the various modules in ERS application, where participant users need to perform related activities according to their roles and responsibilities while working on the ERS.

Indented Audience

The document is created for the ENRL RECON SYSTEM users who are involved in creating, managing, editing ERS records to resolve discrepancies between GPS and CMS data. The registered users need to log in to the ENRL RECON SYSTEM application to work on the various sub-systems or menus.

Prerequisites

Following are the prerequisites to access ERS web application to perform various activities. These include:

- URL of the ENRL RECON SYSTEM application
- User credentials of ERS users
- Compatible web browser

Organization of the User's Guide

This guide contains the information that you need to know to execute all the actions in the ENRL RECON SYSTEM application.

This section explains how the information is organized in various chapters of the user's manual.

Chapter	Description
Chapter 1	Chapter 1, Introduction, provides the detailed introductory overview of the ERS application, various functions, features, and other key aspects of the application.
Chapter 2	Chapter 2, Getting Started, describes the log in and log out process in detail. This chapter also discusses various interfaces, controls, and menus available in the application.
Chapter 3	Chapter 3, Suspect Cases, discusses various suspect cases and methods to create new suspect cases in the system.
Chapter 4	Chapter 4, ERS Queues, provides details about the various queues and their work flows. This also discusses how to search the cases in the system.
Chapter 5	Chapter 5, ERS Manager, discussed the various managerial activities and settings that a manager can execute such as mass update cases , bulk upload enrolments etc.
Chapter 6	Chapter 6, ERS Administration, discusses various administrative activities that can be executed by the admin role which can include managing users, skills and access groups.
Chapter 7	Chapter 7, ERS Maintenance, discusses various admin maintenance related activities such as maintaining alerts, configurations, departments etc.
Chapter 8	Chapter 8, Reports, discusses various reports available in the system in tabular and or pictorial formats.

Typographical Conventions

Formatting Convention	Type of Information
KEY NAMES	Keys on the keyboard appear in title case (first letter in upper case). For example, Page Up, Caps Lock. A combination of keys is connected by a +. For example, Shift + Tab means you should press the Shift key and Tab key together.
Filenames	Names of files are in italics. Example, *System.mdb.*
Command and Screen element names	Buttons check boxes, etc. Commands that you choose from the menus or dialog boxes appear in title case and in bold font. Example: Click **Components** from the **Action** menu.
User-entered text	Text that you would need to enter appears in Verdana font

Feedback and suggestions

United Healthcare welcomes your comments and suggestions on the quality and usefulness of this document.

Your feedback is important as a user of our products, and helps us to best meet your needs. We would appreciate your feedback for the following pointers.

Did you understand the context of the procedures?

Did you find any errors in the information?

Does the structure of the information help you to complete your tasks?

Do you need different information or graphics? If so, where, and in what format?

Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us.

Send your comments and feedbacks to us at: UHG-Team_AS_BA_E_DL@ds.uhc.com.

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with United Healthcare software, then please visit United Healthcare Support Services at http://helpdesk.uhg.com/ or contract http://helpdesk.uhg.com/Pages/Contact-the-Help-Desk-By-Phone.aspx.

Abbreviations and Acronyms

Abbreviations	Expansions
ERS	Enrollment Reconciliation System
UHC	United Healthcare
CMS	Center for Medicare & Medicaid Services
GPS	Next-Generation Policy System
C&S	
M&R	Medicare & Retirement
PCP	
A&G	Appeals and Grievances
GPS	Next-Generation Policy System
MMR	Membership Monthly Report
AVR	Address Verification Resource
CCM	Current Calendar month
CCM-1	Current Calendar Month – 1
ERN	Eligibility Recon Navigator system
MARx	Medicare Advantage and Prescription Drug system
MIIM	Member Interaction & Issue Management system
ODM	Online Document Management system
OOA	Out of Area
SCC	State County Code
TRR	Transaction Reply Report
RPR	Retroactive Processing Request
SLA	Service Level Agreement
TRC	Transaction Reply Code
TAT	Turn-Around-Time
UHC	United Healthcare
PBP	

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Chapter 1 Introduction

This chapter provides an introductory overview of the ERSs application and other key features of the application. The chapter contains the following sections:

- Introduction to ENRL RECON SYSTEM
- ERS Overview
- ERS Application
- Key aspects in ERS

1.1 Introduction to ENRL RECON SYSTEM

Welcome to the ENR RECON SYSTEM User's Guide. This user's guide contains the information that the ERS users need to know to work with the ERS application effectively. This guide contains the below information:

- Overview and reference information
- Features and functionalities of the ERS application
- Details about the ERS systems and subsystems

1.2 ERS Overview

ENRL RECON SYSTEM or Enrolment Reconciliation System (ERS) aims at identifying member data issues, discrepancies, and data mismatches between the CMS MMR record and the GPS data for a payment month. This also aims at mitigating these issues through reconciliation by creating discrepancy cases or new records. It ensures integration GPS data in in CMS data by resolving the data mismatch issues.

The Centers for Medicare & Medicaid Services (CMS) is part of the U.S. Department of Health and Human Services. Apart from other responsibilities, CMS decides administrative simplification standards from the Health Insurance Portability and Accountability Act of 1996 (HIPAA).

Next generation Policy System (GPS) is UHC system that is used for member enrolment activities. The role of the ERS system is to provide automated solutions for mitigating enrolment related issues which enables the CMS transaction convenient and errorless.

1.2.1 ERS Application

Enrolment Recon System or ERS is web application that is designed for reconciliation of member data discrepancies between CMS MMR and GPS. This application has multiple modules and subsystems that ensure rectifying data mismatches through creation, review, and analysis of the various records or cases. Using various work baskets, it ensures creating various cases. Work baskets are various types of discrepancies that identified between the CMS and GPS data. MMR eligibility, DOB and Gender, OOA, SCC, TRR, and RPR are prominent among them.

This application helps performing the following activities through various roles and work basket access rights.

- **Application**
  - Working Eligibility discrepancies
  - Working OST discrepancies
  - Working TRR discrepancies
- **Management**
  - Managing case bulk upload
  - Managing case unlock
  - Managing case reassignment
  - Managing case mass update

- **Administration**
    - Managing access groups
    - Managing users
    - Managing skills
- **Maintenance**
    - Maintaining alerts
    - Maintaining Configuration
    - Maintaining Departments
    - Maintaining Lookups
    - Maintaining Lookup correlations
    - Maintaining Resources
- **Reporting**
    - ERS Home page summary report
    - ERS Error Log Report
    - ERS Locked Record Report

1.2.2 Key aspects in ERS

Member data discrepancy

A member data discrepancy is a data mismatch between the CMS MMR record and the Plan data for a payment month. A discrepancy can be identified in any month or months in 36 months. A discrepancy will reoccur until the reconciliation comparison matches.

Discrepancy case

Discrepancy case is a new discrepancy record or a case created after the identification of the data mismatch. Based on the types of the discrepancies, various discrepancies can be created. The discrepancy case routes to multiple workflows until the reconciliation comparison matches.

Discrepancy sources

These are the basis on which the discrepancies are identified and categorized. Based on the sources issues or discrepancies are identified.

Discrepancy types

Discrepancy types are the kinds of discrepancies based on which the issues are identified. These are the issues which triggered data mismatch in the GPS and MMR data. In Area, Out of Area, Incarceration, CMS Y / Plan N, CMS N / Plan Y, Contract, PBP, DOB, Genders are prominent among others.

Chapter 2 Getting Started

This chapter explains how to get started with the ERS application using your user credentials. This chapter also familiarizes you with various menus, tools, interfaces that are used in the application. Based on your user account, roles, and business segment, you can get started with the application and perform the required tasks.

This chapter contains the following sections:

- Accessing ERS Application
- ERS Home Page
- ERS User Interfaces
- ERS Menus
- ERS Controls
- ERS Messages
- Log in Page Interface
- Home Page Interface
- Special Activities in ERS
- Some Essential controls

2.1 Accessing ERS Application

2.1.1 Login

As an Enrolment team user, you can get access to the ERS application using the Login page. You can login to the application based on your business segment, work basket, and role.

Prerequisites:

1. Web address or URL of the application
2. Active user account

You can enter the application website address or URL in a browser compatible with the ERS application to lunch the home page of the application. The login page of the application appears.

Figure 2-1: The Login Page

> ***Note**: If the user has active user account, the name of the user appears in the **User Name** field of the Login page. A user with inactive or no account cannot log in to the application.*

To login to the ERS application:

1. Select the appropriate business segment in the Business Segment field.

The available values in the field are M&R, C&S, and PCP.

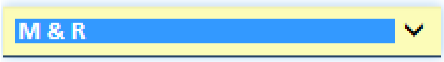


Figure 2-2: Business Segment

2. Select the appropriate work basket in the **Work Basket** field.

The available values in this field are OST, Eligibility, and RPR.

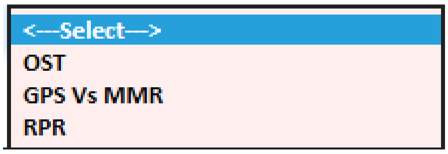


Figure 2-3: Work Basket

3. Select the appropriate role from the **Role** field.

The roles assigned to your account available in this field. The available values in this field are Admin, Manager, Processor, and Viewer.

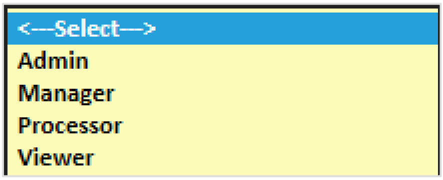


Figure 2-4: Roles

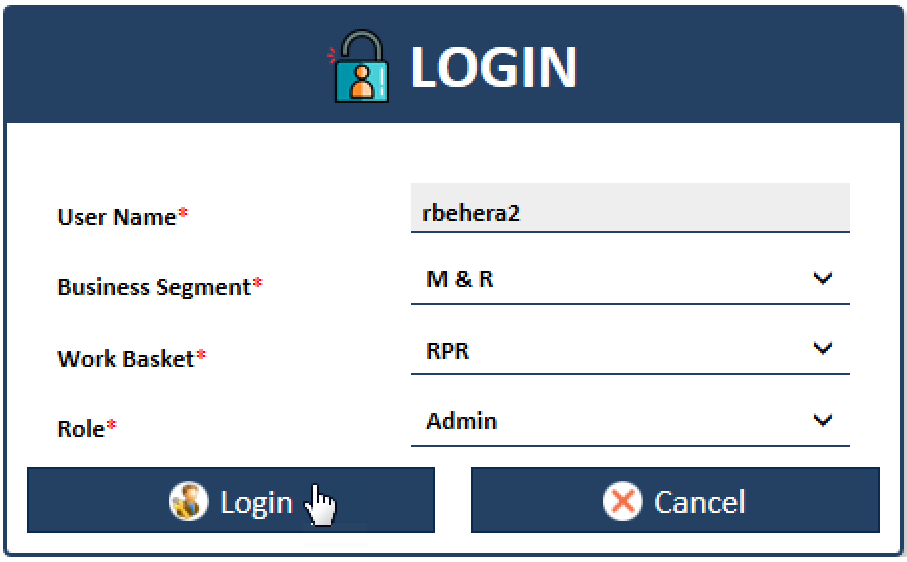


Figure 2-5: The Login Page

***Note**: The login button gets activated after you select values in **Business Segment** and **Work Basket** fields.*

4. Click the **Login** button to login to the application.

   The home page of the ERS application appears.

***Note**: To close the application, users can click the **Cancel** button at any point of time while working on the **Login** page. A dialog window appears with the message **The webpage you are viewing is trying to close the tab. Do you want to close the tab?** if users click the **Cancel** button. If users click **Yes** in the message window, the application gets closed and if the users click **No** the **Login** page remains open.*

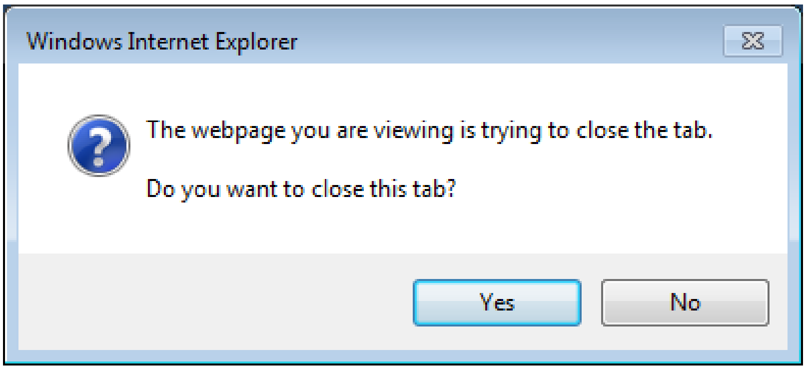


Figure 2-6: The Cancelling Log message

The home ERS application home page.

Figure 2-7: The ERS Application>Home Page

2.1.2 Log Out

While working on ERS, you can logout from the application at any point of time. You can click the Logout button available at the extreme right corner of the application irrespective of the page you are working on.

To log out of the ERS application:

1. Go to the top right corner and click the username.

The log out option appears in the drop down list along with other options.

2. Click **Logout** from the list.

Figure 2-8: The Logout Section

A message, "The webpage you are viewing is trying to close the tab. Do you want to close the tab" appears.

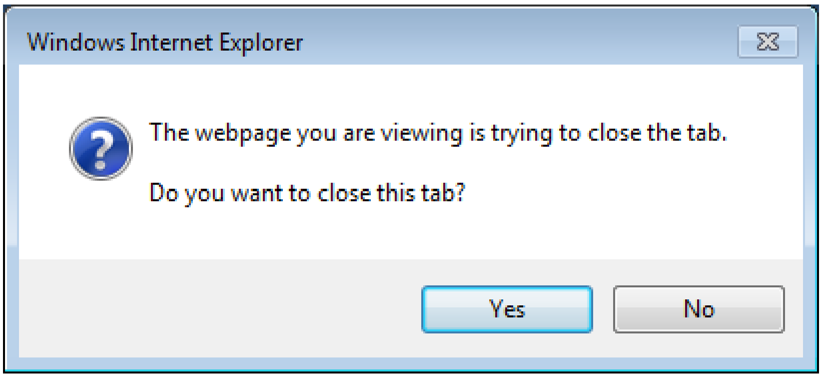


Figure 2-9: ERS message for Log out

3. Click the button **Yes** to close the application.

If you click No, a message, **Logged Out: Close Browser To Complete Log Out. You must close your browser to complete the log out process. Go back to Login** link appears.

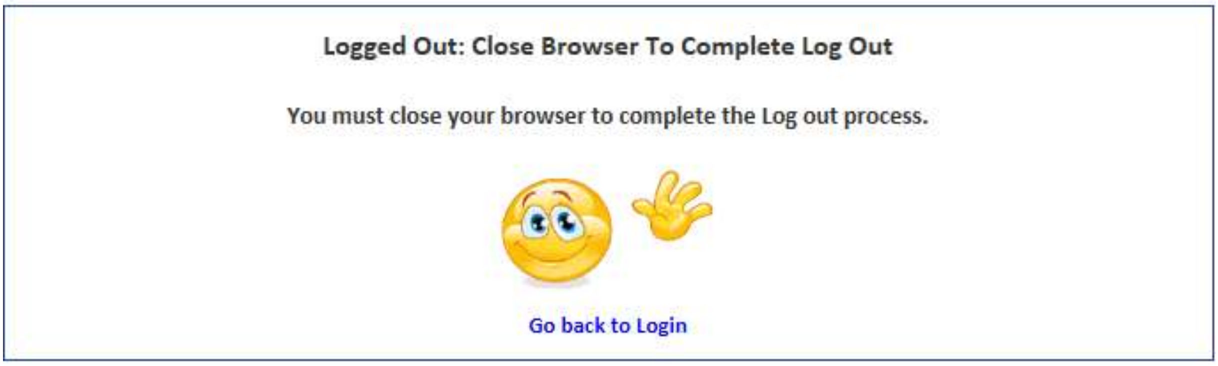


Figure 2-10: The ERS Log Out Message

2.1.3 Re-login

You can re-loin to the ERS application using the **Logout** page immediately after logging out. The message **Go back to Login** is hyperlinked with the **Login** page.

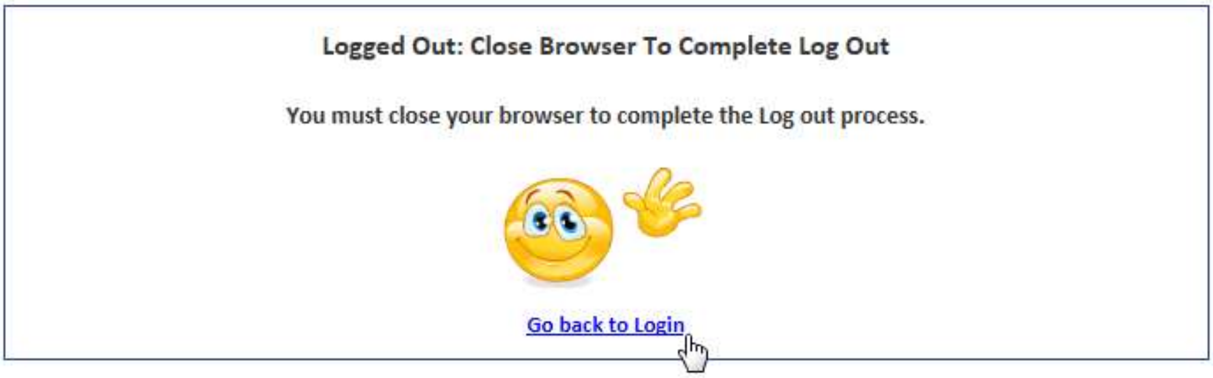


Figure 2-11: The Logout Page

To re-log in to ERS application:

1. Click the link **Go back to Login** in the message. The login page appears.
2. Follow the steps described in the Login section to login to the application.

The home page of the ERS application appears.

2.2 ERS Home Page

The home page of the application provides all the important details of the applications such as cases, queues, and all the main menus of the application.

Figure 2-12: The ERS Home Page

The home page consists of the following:

- Menus

- User details section
- Queue summaries
- Pending work baskets details
- Resent case details

2.2.1 Menus

Figure 2-13: ERS Application Menus

ERS menus in the home page help you access various module and submodules of the application. This helps you creates, edit, delete and configure various actions, activities, tasks and user details. The following menus are available in the ERS application:

- **Home**: Helps you access the home page of ERT application.
- **Administration**: Helps the admin user to manage skills, user access groups and users.
- **Maintenance**: Helps managers to maintain alerts, configuration, departments, lookups, lookup correlations and resources in the application.
- **Application**: Helps all users to create and edit cases, access queues and search records.
- **Manager**: Helps managers to create and edit cases, view queues and maintain application settings.
- **Reports**: Helps all users to access ERS reports.

- **Help**: Helps the all users to get additional helps regarding the application.

Based on the user log in, availability of the menus differs. For more information user and role access, refer to the User and meus access section. For more information on the user and menu access, refer to the User and menus access section.

2.2.2 User Details Section

The user details section appears to extreme right corner of the application. This section provides details such as user access, user preference and log out.

If you move the mouse pointer to the role name section, the details appears.

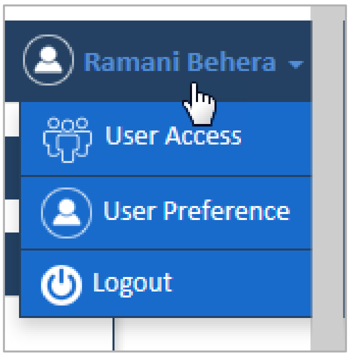


Figure 2-14: User details Section

2.2.2.1 User Access

The **User Access Details** table provides details about the user and its access to the business unit, work basket, role, and access group.

Navigation:

To access the **User Access Details** table, move your mouse pointer to user name and click **User Access** link.

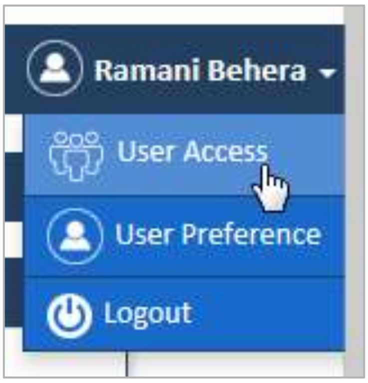
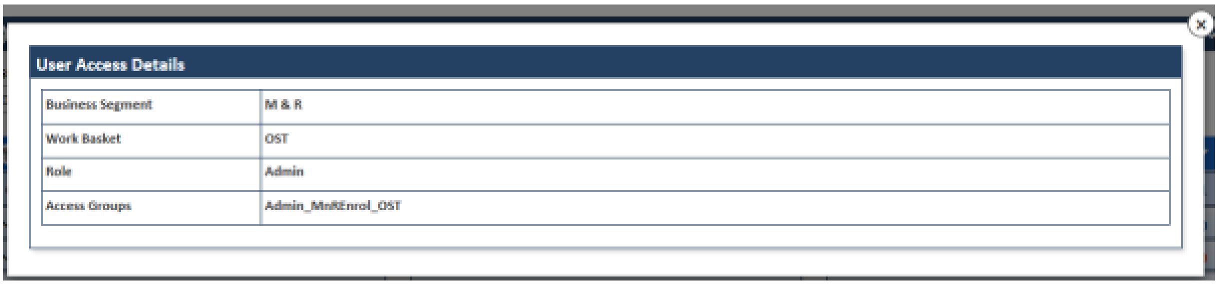


Figure 2-15: The User Access Link

The **User Access Details** table appears.



User Access Details

Business Segment	M & R
Work Basket	OST
Role	Admin
Access Groups	Admin_MnREnrol_OST

Figure 2-16: The User Access Details Table

2.2.2.2 User Preference

The **User Preference** link in the user details section provides access the **User Preference** table. Using this table, the user can customize the sections and details to be displayed in the home page.

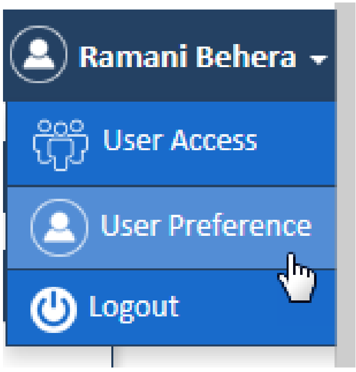


Figure 2-17: The User Preference Link

Navigation:

To access the **User Preference Details** form, move your mouse pointer to user name and click User Preference link. The **User Preference Details** form appears.

To customize the home page appearance, referent to the form below:

The user preference table consists of the various controls and commands to execute the tasks. The user needs to be well acquainted with the various controls before working on this section. For more information on the various controls, refer to the ERS Controls section.

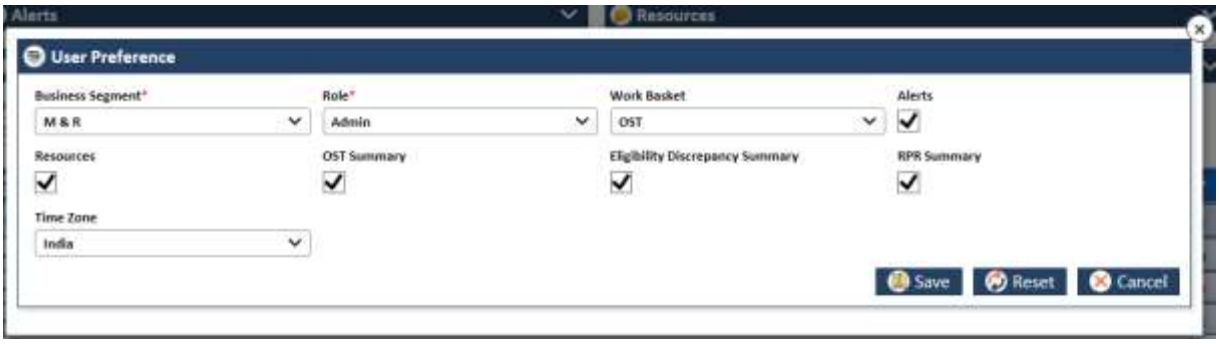


Figure 2-18: User Preference Table

Field	Description
Business Segment	Select the business segment in this field. This field displays the following values: • C & S • M & • R PCP
Role	Select the roles in this field. This field displays the following values: • Admin • Manager • Processor • Viewer
Work Basket	Select the work basket in this field. This field displays the following values: • GPS Vs MMR • OST • RPR These are various categories of cases based on which you create and review the records to resolve discrepancy.
Alerts check box	Select this check box to make the Alerts section available in the hope page.
Resources check box	Select this check box to make the Resource section available in the hope page.
OST Summary check box	Select this check box to make the OST Summary section available in the hope page.
Eligibility Discrepancy Summary check box	Select this check box to make the Eligibility Discrepancy Summary section available in the hope page.
RPR Summary check box	Select this check box to make the RPR section available in the hope page.
Time Zone	Select the time zone under which you need to create and review cases.
Save	Click this button to save the changes made in the form.
Reset	Click this button to remove the selections.
Cancel	Click this section to cancel the process.

2.2.2.3 Log out

This link in the user details section helps you log out of the application.

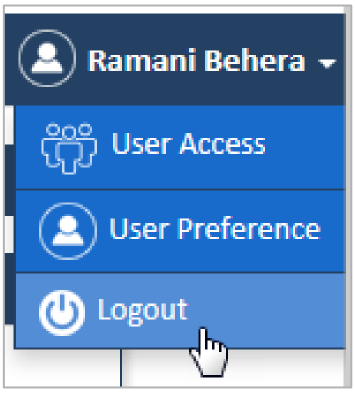


Figure 2-19: The Logout Link

Navigation:

To log out of the application, move your mouse pointer to user name and click **Logout** link. The **User Preference Details** form appears.

The following message appears.

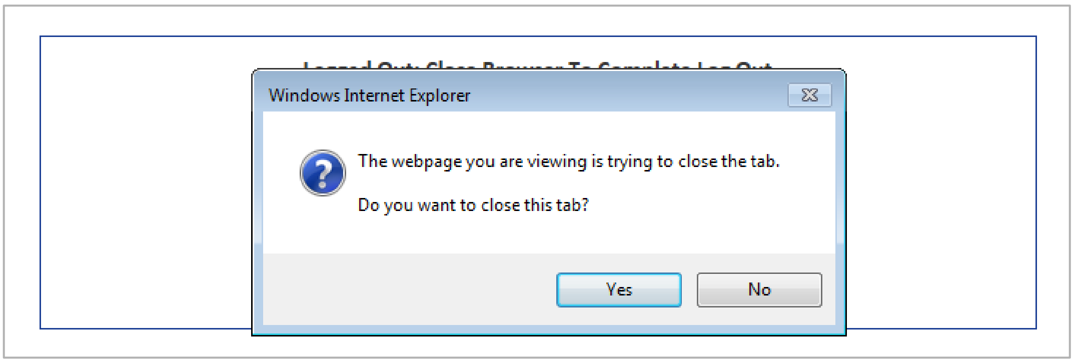


Figure 2-20: The Logout Message

For more information on how to log out and re-log in to the application, refer to the Log Out and Re-login sections, respectively.

2.2.3 Reconciliation Queue Summaries

The **Recon Queue Summaries** table provides you summary of the all the queues. This is an expandable and collapsible window.

These tables provide summaries of the all the queues. The following queue summaries are available in the home page. This section displays the all the queues such as **Processing**, **Holding** and **Completed**, available in various types of the discrepancy issues or wok baskets.

You can customize you view by expanding and collapsing the sections or table data by clicking the down and up arrows respectively. For more information on expanding and collapsing sections, refer to the Que summary section.

Figure 2-21: Recon Queue Summaries section

Summary Name	Field	Description
OST Summary	OOA	Provides processing, holding, and completed queues details.
	OOA TRR	Provides processing, holding, and completed queues details.
	SCC Discrepancy	Provides processing, holding, and completed queues details.
GPS vs MMR Discrepancy Summary	Eligibility Discrepancy	Provides processing, holding, and completed queues details.
	Gender Discrepancy	Provides processing, holding, and completed queues details.
	DOB Discrepancy	Provides processing, holding, and completed queues details.
RPR Summary	RPRs	Provides processing, holding, and completed queues details.

2.2.4 Pending work baskets

Figure 2-22: The Pending Work Baskets Table

Column Name	Description
Actions	Displays the following actions to be taken on the cases.
ERS Case ID	Displays the ERS Case ID.
Discrepancy Category	Displays the discrepancy category.
Discrepancy Type	Displays the discrepancy type.
Current HICN	Displays the current HICN.
Contract Id	Displays the contract ID.
PBP	Displays the PBP.
First Name	Displays the first name of the member.
Last Name	Displays the last name of the member.
Case Age	Displays the case age.

Column Name	Description
Discrepancy Start Date	Displays the discrepancy start date.
Pend Reason	Displays the pend reason.
Pended By	Displays the user that pended the cases.
Pended On	Displays the date when the case was pended.
Most Recent Queue	Displays the most recent queue of the cases.
Most Recent Status	Displays the most recent status of the cases.

2.2.5 Recent case details

This table displays the recent activities in the application.

Column Name	Description
Actions	Displays the following actions to be taken on the cases.
ERS Case ID	Displays the ERS Case ID.
Discrepancy Category	Displays the discrepancy category.
Discrepancy Type	Displays the discrepancy type.
Most Recent Queue	Displays the most recent queue of the case.
Most Recent Status	Displays the most recent status of the case.
Assign To	Displays the user to who this case is assigned.
Locked By	Displays the user name that has locked the case.
Created By	Displays the user name that created the case.
Created On	Displays the case creation date.
Last Updated By	Displays the user name that last updated the case.
Last Updated On	Displays the date when the case is last updated.

2.3 ERS User Interfaces

User interface elements in ERS application enable users to interact with the various pages; sections, and tabs of the applications. These elements, which include controls and commands, are presented to the user in various graphical forms, menus, toolbars, dialog boxes and individual elements such as hyperlinks etc.

2.3.1 User interface syntax

The following terms are most commonly used to describe how users interact with controls and commands in the ERS application:

- ***Click:*** This term is used for commands, command buttons, option buttons etc.
- ***Select and clear:*** This term is used for checkboxes.
- ***Remove the check mark:*** This command is used for checked and unchecked commands.
- ***Type or select:*** This term is used to refer to an item (as in a combo box) that the user can either type or select in the accompanying text box.
- ***Enter:*** This term is used to type text in the text boxes.

2.3.2 ERS Menus

The ERS application has multiple menus that are displayed from the top left corner of the application home page. Menus are group of main commands of the ERS application. These are also referred to as subs-systems as they are considered to be the modules of the application. They are organized in menu bar and contain some sub-menus under them.

Figure 2-23: ERS Application Menu Bar

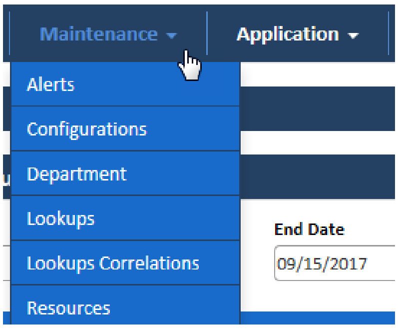


Figure 2-24: The ERS Application>Maintenance Menu

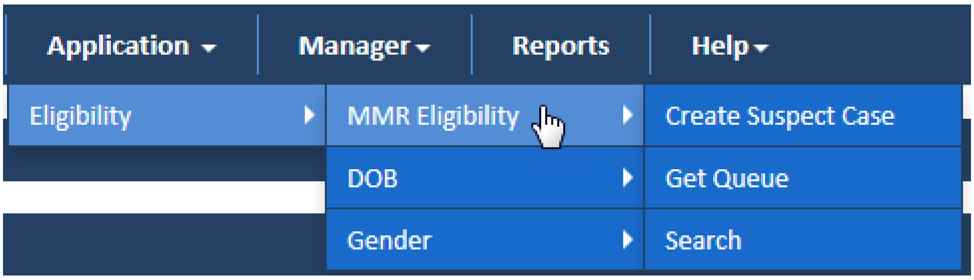


Figure 2-25: ERS Application> Sub-menu and Associated menu

The ERS application has the following menus and submenus:

Sub-menus	Associated Menus	Description
Home menu		
NA		Helps you to access the hope page of the application. By default, the application displays the home as the landing page. For more information on home page, refer to the ERS Home Pagesection.
Administration menu		
Manage Users	NA	Helps you to manage the users in the application.
Manage Access Groups	NA	Helps you to manage the access groups in the application.
Manage Skills	NA	Helps you to manage the skills in the application.
Maintenance menu		
Alerts	NA	Helps you to maintain alerts in the application.
Configurations	NA	Helps maintain configurations in the application.
Department	NA	Helps you to maintain departments in the application.
Lookups	NA	Helps you to maintain lookups in the application.
Lookups Correlations	NA	Helps you to maintain lookup correlations in the application.
Resources	NA	Helps you to maintain resources in the application.
Application menu		
OST	*OOA*>Create Suspect Case	Helps you to create OOA suspect cases.
	OOA>Get Queue	Helps you to access OOA queues
	OOA>Search	Helps you to search OOA cases

Sub-menus	Associated Menus	Description
	SSC>Create Suspect Case	Helps you to create SSC suspect cases.
	SSC>Get Queue	Helps you to access SSC queues
	SSC>Search	Helps you to search SSC cases
	TRR>Create Suspect Case	Helps you to create TRR suspect cases.
	TRR>Get Queue	Helps you to access TRR queues
	TRR>Search	Helps you to search TRR cases
Eligibility	*MMR Eligibility*>Create Suspect Case	Helps you to create MMR Eligibility suspect cases.
	MMR Eligibility>Get Queue	Helps you to access MMR Eligibility queues
	MMR Eligibility> Search	Helps you to search MMR Eligibility cases
	DOB>Create Suspect Case	Helps you to create DOB suspect cases.
	DOB>Get Queue	Helps you to access DOB queues
	DOB>>Search	Helps you to search DOB cases
	*Gende*r>Create Suspect Case	Helps you to create Gender suspect cases.
	Gender >Get Queue	Helps you to access Gender queues
	Gender >Search	Helps you to search Gender cases
RPR	Create Suspect Case	Helps you to create RPR suspect cases.
	Get Queue	Helps you to access RPR queues
	Search	Helps you to search RPR cases
Manager menu		
Bulk Upload	NA	Helps you to upload multiple record templates
Unlock	NA	Helps you to unlock records
Reassign	NA	Helps you reassign records
Mass Update	NA	Helps you to update multiple records
Reports menu		
NA	NA	NA
Help menu		
About	NA	Helps you to access the details about the application
User Manual	NA	Helps you to access the user's manual of the application

2.3.2.1 Roles and menus access

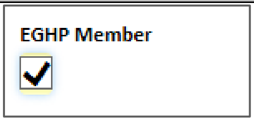
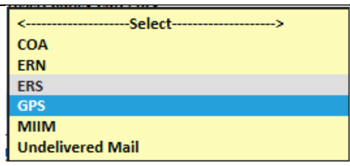
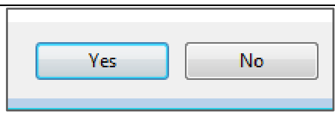
The following table provides details about the user and menus access:

Roles	Menus						
	Home	**Administration**	**Maintenance**	**Application**	**Manager**	**Reports**	**Help**
Admin	√	√	√	√	√	√	√
Manager	√	×	×	√	√	√	√
Processor	√	×	×	√	×	√	√
Viewer	√	×	×	√	×	√	√

2.3.3 ERS Controls

Controls are user interface elements that help the users to perform specific tasks and activities designed to meet the application objectives. They control the behavior, performance and changes in the application while working on the application. These are graphical representation of an action related to a particular task. For example, to save a data filled-in form, you may click a button called Save. This is a control in the application.

The following table represents all the controls in the application.

Control Name	What it is	How it is used	Example
Check box	Small square box in application that is selected or cleared to turn on or off an option.	Select the **EGHP Member** check box if you want enter the EGHP number.	
Combo box	Text box with a list box Attached to it. The list is Always visible. Because users can either type or select their choice, you can use enter to describe the action. Follow your project	In the **Source System** box select or type source system that you want to use.	
Command button	Rectangular button that initiates an action	To close the application, click **Yes**.	
Command link	NA	NA	NA
Drop-down arrow	Arrow associated with a drop-down combo or list box or some toolbar buttons, indicating a list the user can view by clicking the arrow.		
Drop-down combo box			
Drop-down list box			
Group box			
Links			
List box			
Tab* (also called tabbed page in technical documentation)			
Text box			
Title (do not use caption)			

Control Name	What it is	How it is used	Example
Unfold button			
Next button			
Collapsible Panels			

2.3.4 Important Commands

ERS application has the following most important command controls that are used in all the forms throughout the application. You can use the same or similar control while creating, editing cases and responding to the queues. Thought the guide, these are referred to as buttons. For example, click the Save button to save the form.

Controls	Control Name	Description
Save	Save button	Click this button to save and submit the case creation form for the further processing.
Reset	Reset button	Click this button to remove the all the Selected and entered value in the form so that once you can Select and entered different values.
Cancel	Cancel button	Click this button to cancel the case creation form. You get routed to the home page if you click the button.
Refresh	Refresh button	Click the button to refresh the current data so that new data can be loaded in the form.
Start Processing	START Processing button	Click this button to opening the queue to further processing.
Get Next		Click this button access the next record in a queue for the further processing.
History	History button	Click this button to view the activities on the current while working on case (accessing from the queue)
View	View Button	Click the button view the queue summary details.
Queue Summary	OOA Queue Summary	Click this button to access the Queue Summary page while you are in the **Work Item<discrepancy category>** window
Export	Export	Click this button open the Excel sheet where you can enter multiple dates for mass update.
Search	Search button	Click this button to search the record in the application. This helps you display the record based on the search criteria.
Add New **or** Add	Add New or Add button	Click this button to add or create new administration items and maintenance items. For example, to create a new alert, click the Add New button.
Add User		
or Add	Add new administration	Click this button to add new administration items in a row. For example, you can add a new skill in Access Group form by clicking this in button.
Report	Report button	Click this button to view the report.
Unlock	Unlock button	Click this button to unlock the locked cases in the application.

Controls	Control Name	Description
	Bulk Reassign	Click this button for bulk assignment of the record for further processing.

2.3.5 Log in Page Interface

The log in page has multiple user interfaces which the user used to log in to the application. Following are the command button used in the Login page. Command buttons are the rectangular button that helps initiating an action.

- **Login** button
- **Cancel** button:
- Business Segment list box:
- Work Basket list box:
- **Role** list:

2.3.6 Home Page Interface

2.3.7 ERS Messages

The ERS application has many customized messages that appear on taking specific action while working on the application. The messages include error message, warning message, confirmation, notification, alert, etc.

2.3.7.1 Errors

The screenshot displays an error message that appears when the user enters wrong field input.

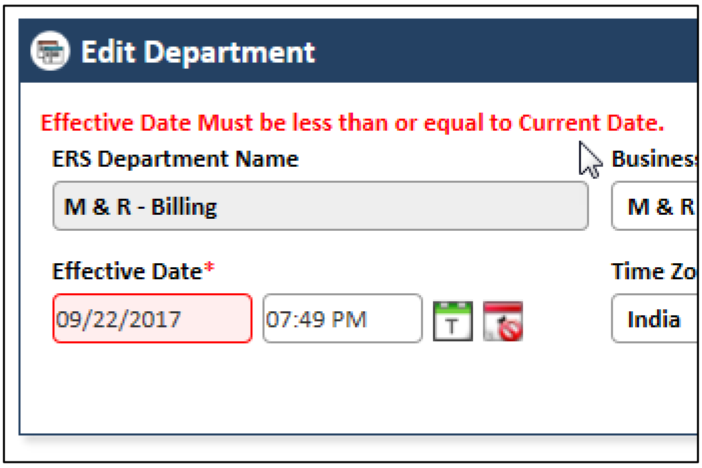


Figure 2-26: ERS Error Message

2.3.7.2 Warnings

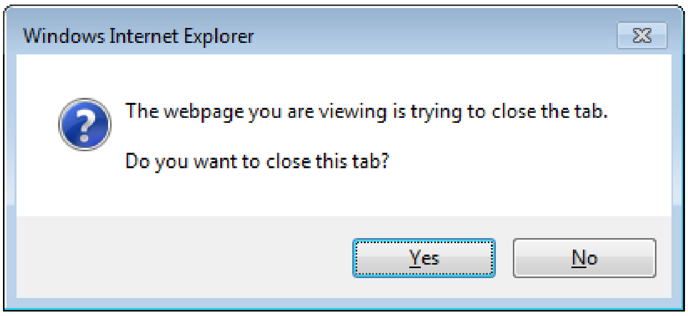


Figure 2-27: ERS Warning Message

2.3.7.3 Confirmations

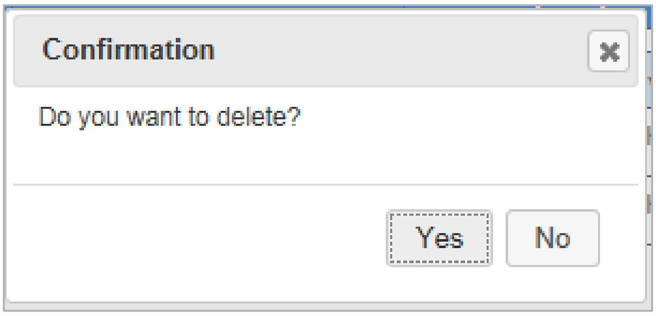


Figure 2-28: ERS Confirmation Message

2.3.7.4 Notifications

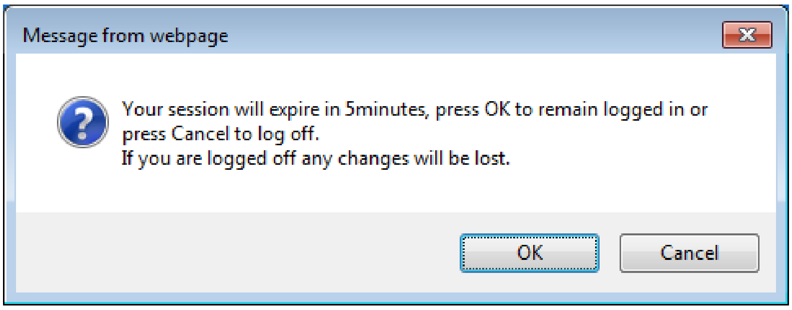


Figure 2-29: ERS Notifications

2.3.7.5 Alert

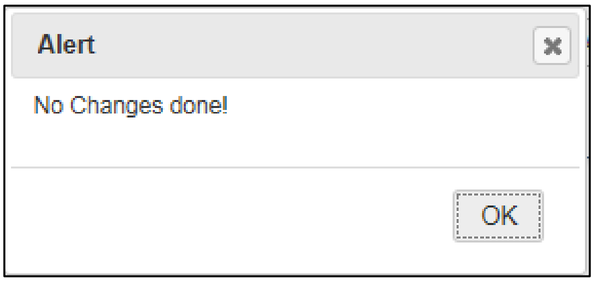


Figure 2-30: ERS Alert Message

2.3.8 Special Activities in ERS

The ERS application allows the user to perform multiple essential tasks while working on various page and interfaces of the application

2.3.8.1 Attaching and deleting documents

You can attach one or more attachments in the application while working on it. You can attach only PDF documents.

To attach a file:

1. Click the **Add Attachment** button. The **File Upload** window appears.

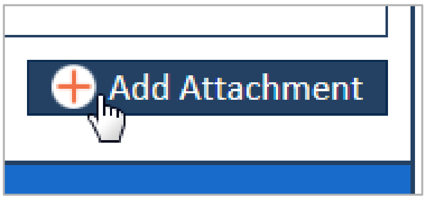


Figure 2-31: Add Attachment Link

Figure 2-32: The File Upload Dialog

2. Click the **Browse** button and navigate to the file in local drive.

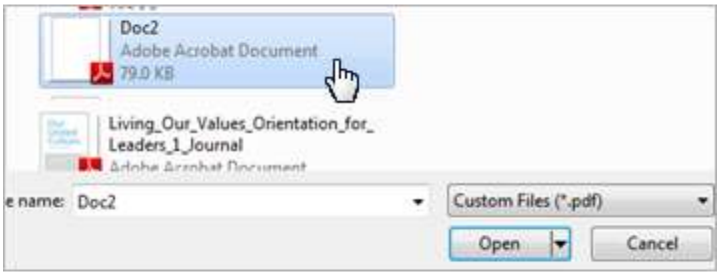


Figure 2-33: The document in local drive

3. Select the file and click the **Open**. The file gets attached and displays the complete path of the file.
4. Click the **Upload** button to upload the file. The file gets attached.

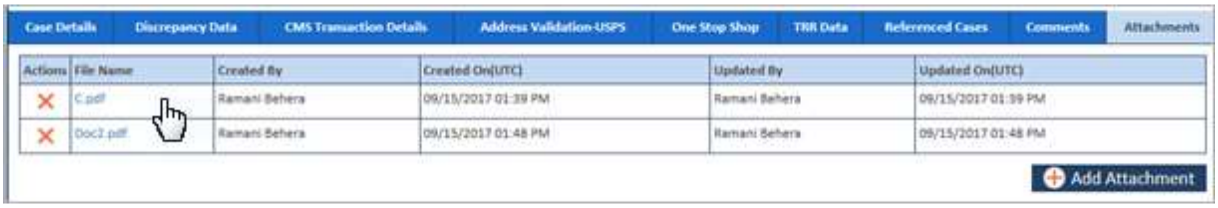


Figure 2-34: Attached File> Attachment Tab

2.3.8.1.1 Deleting attachments

To delete the attachments:

1. Under the **Action** column, go to the file that you want to delete.

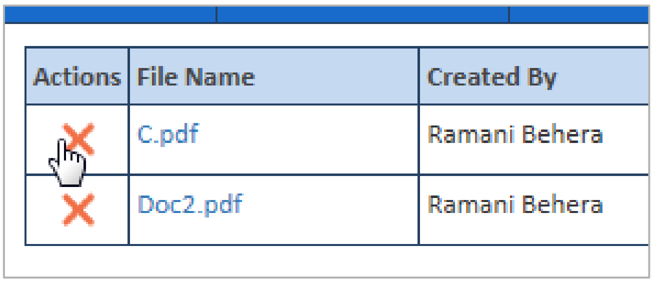


Figure 2-35: Action column> Delete Files

2. Click the **Delete** icon to delete the file. A confirmation message appears.

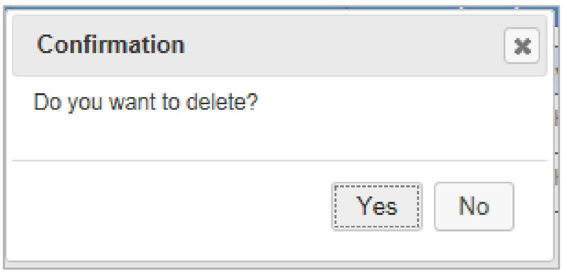


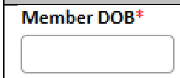
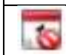
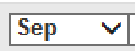
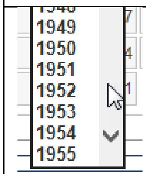
Figure 2-36: Confirmation Message

3. Click **Yes** to delete the file. The file gets deleted.
4. Click **No** to keep the file without deleting.

2.3.8.2 Entering date values ERS pages

You can enter date value using the date picker control. This helps you either enter date or select a date from the calendar.

Figure 2-37: The Date Picker control

Controls	Control Name	Description
	Date field	Helps you to enter or select the date in MM/DD/YYYY format.
	Current Date	Helps you select the current date. To select the date click this tool.
	Clear Date	Helps you reset the selected date. To clear the entered date, click this tool.
	Previous	Click this to select a previous month in the month field.
	Next	Click this to select a next month in the month field.
	Month drop down	Click drop down arrow to select a month.
	Year Drop Down	Click drop down arrow to select a year.
	Year scroll bar	Click the up and down arrow to scroll the years and select year in the year field.
	Days in a month	Click a particular day in a selected month to enter the date in the date field. Once you click the date, the date with selected month and year appears the date field.

To select or enter a date following steps:

1. Click the date field. The **Calendar** control appears with month and year drop down list box and all the day of the month that is select the in the moth drop down list box.

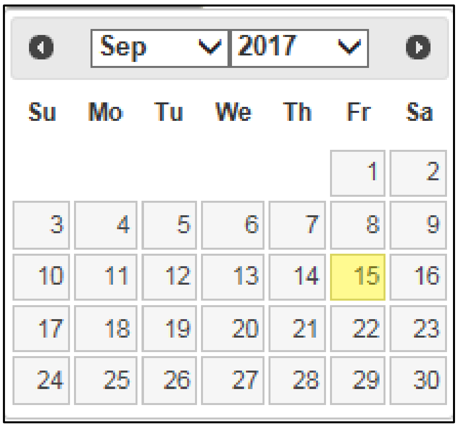


Figure 2-38: Calendar control

2. Click the month dropdown to select the month you want include in the date.
3. Click the year drop down to select the years.
4. To find more year option, use the down and up scrolling.
5. Click a day on the selected month in a selected year.

The date gets selected in the date field.

2.3.8.3 Selecting a value from list box

2.3.8.4 Entering value in the text boxes

2.3.8.5 Selecting Checkboxes

2.3.8.6 Uploading files in ERS pages

2.3.8.7 Viewing ERS reports

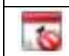
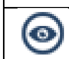
2.3.8.8 Viewing History

2.3.8.9 Accessing search result tables

2.4 Some Essential controls

ERS application has different controls that help you to perform certain tasks while working on application. Before working on various pages, you must be aware of the menus. The color of the controls changes when you move the mouse to the controls. Controls are various access paths, navigation buttons and command buttons that help complete certain tasks.

The following are the list of the controls available in the ERS application:

Tools	Tool Name	Description
	Current Date	Helps you select the current date. To select the date click this tool.
	Clear Date	Helps you reset the selected date. To clear the entered date, click this tool.
	Edit	Helps you edit the details. To edit users, click this tool and open the respective user details page.
	View	Helps you to view the details of the particular item in table row.
	History	Helps you find the previously entered details. Click this tool to view history details.
	Delete	Helps you delete the edited or added details. Click this tool to delete recently added or edited details.

Tools	Tool Name	Description
	Add	Helps you add a section/row to fill the respective details. To add the section/row, click this tool.
	Search	Helps you search the details that you want to look for.
	Reset	Helps you reset the data entered/selected. Cl
	Cancel	Helps you cancel the process.
	Save	Helps you save the edited or entered details of the form.
10		Helps you select the number items/ rows need to be displayed in the page.
Previous	Previous	Helps you find the similar details in the next page. Click this tool to view the data in the next page or section.
Next	Next	Helps you find the similar details in the previous page. Click this tool to view the data in the previous page or section.
	Ascending	Helps you display the items in table alphabetically ascending ways. Click this tool to display the descending order of the items in the rows.
	Descending	Helps you display the items in a table alphabetically descending ways. Click this tool to display the ascending order of the items in the rows.
	NA	Helps you displays the items alphabetically ascending ways.
	View	Helps you to view the report. Click this tool to view report or forms.
	Report	Helps you view the reports. Click this tool to view the report.
	Get from Web	Helps you import information from Internet.
	Save Report	Helps you to save the reports. Click this tool to save the reports.
	Open Queue	Helps you open the queue work items. Click this tool to work on the queue.
	View Queue	Helps you view the details of the queue. Click this tool to view the details about the queue.
	Check Box	Helps you select a particular value or field.
Add Attachment	Add Attachment	Helps you attaching a file from the local drive.
	Delete Attachment	Helps you deleting the attached file from a page.
Cancel	Cancel	Helps you cancelling a particular process.
	View History	Helps you access details activity history of a case
	View Records	Helps you view the records.
	Reopen Records	Helps you to reopen the records.
	Edit Record	Helps you to edit the records.

Chapter 3 Suspect Cases

This chapter discusses about the suspect cases available in the application and how to create these suspect cases for various discrepancies under various discrepancy categories.

This chapter contains the following sections:

- Suspect Cases Overview
- Creating Eligibility Suspect Cases
- Creating DOB/Gender Cases
- Creating OOA Cases
- Creating SSC Cases
- Creating TRR Cases
- Creating RRP cases

3.1 Suspect Cases Overview

Creating a case is the very initial step or process of initiating reconciliation process by adding records or member data in the systems. These cases are reviewed and analyzed repeatedly to identify discrepancies and provide the solutions. A case can be defined as creation of a member record by adding member information and discrepancy details which aims at figuring out discrepancies in the CMS and GPS data. The process ultimately ends in ensuring mitigating CMS and GPS data mismatch issues.

Based on various types of the discrepancies, the cases are broadly divided into three categories: GPS vs. MMR cases (MMR Eligibility DOB, and Gender), OST (OOA, SCC, and TRR), and RPR cases.

3.2 GPS Vs MMR Suspect Cases

The MMR vs GPS suspect cases are created to identify, analyze, and rectify the issues, errors, and discrepancies between the source data in GPS and the data available in MMR. As an ERS user, you can create Eligibility, Gender and DOB cases to ensure data accuracy and avoid discrepancies in MMR and GPS data.

Suggestions: *Before creating the MMR vs GPS suspect cases, the users must login to the application using the MMR vs GPS work basket and a role which has access rights to the Eligibility module.*

3.2.1 Creating Eligibility Suspect Cases

As an ERS user, you can create MMR vs GPS Eligibility suspect case using the **Create Eligibility Case** form. You must provide all the basic and mandatory information in the form such as member info and the discrepancy details.

Note*: All the fields marked with asterisk (*) in the form are mandatory fields.*

Navigation:

To access the **Create Eligibility Case** form, go to the **Application** menu, point to **Eligibility>MMR Eligibility** sub-menu and lick the **Create Suspect Case** link. The **Create Eligibility Case** form appears.

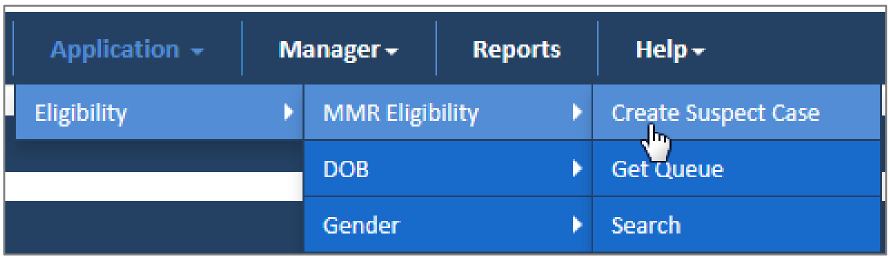


Figure 3-1: Create Eligibility Case> Eligibility

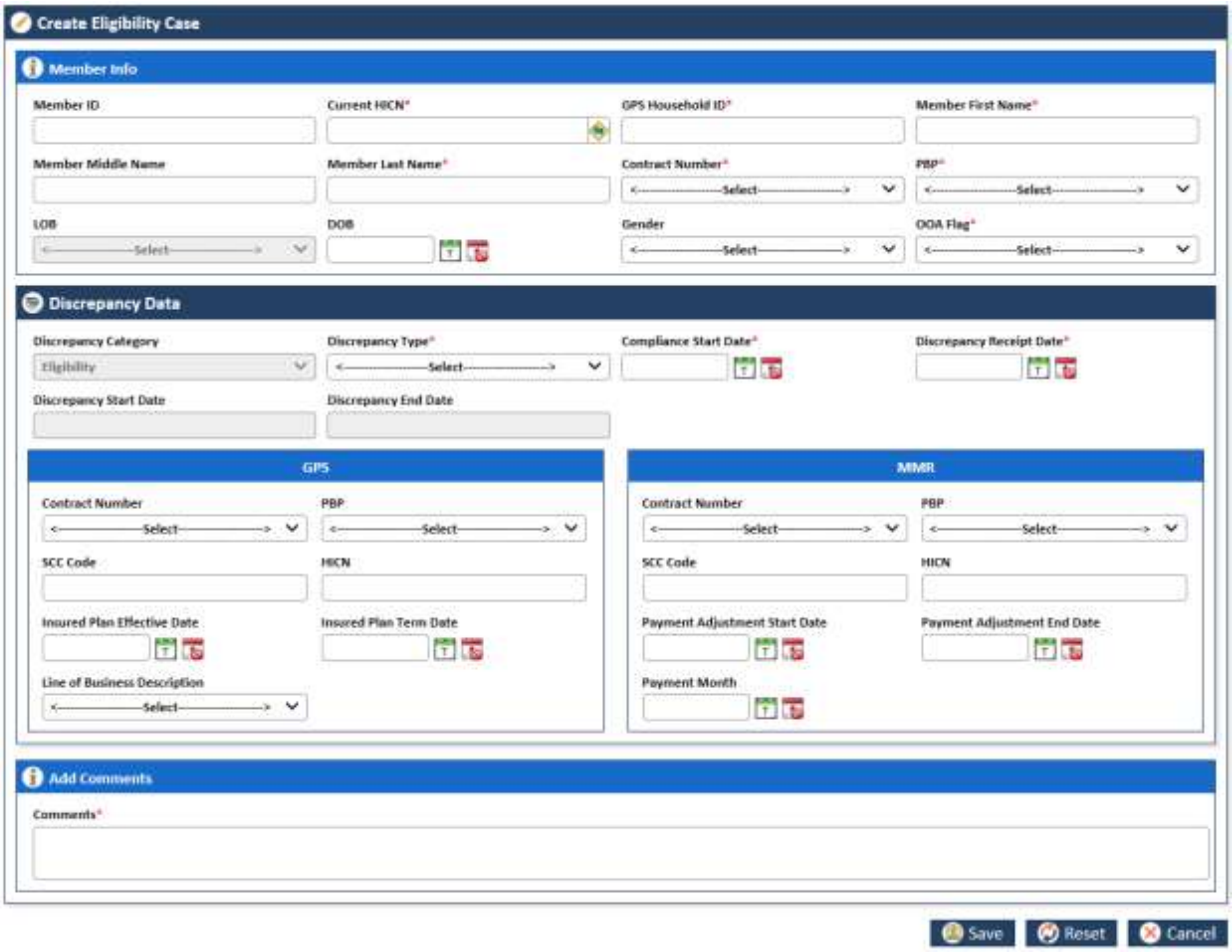


Figure 3-2: The Create Eligibility Case form

3.2.1.1 The Create Eligibility Cases form

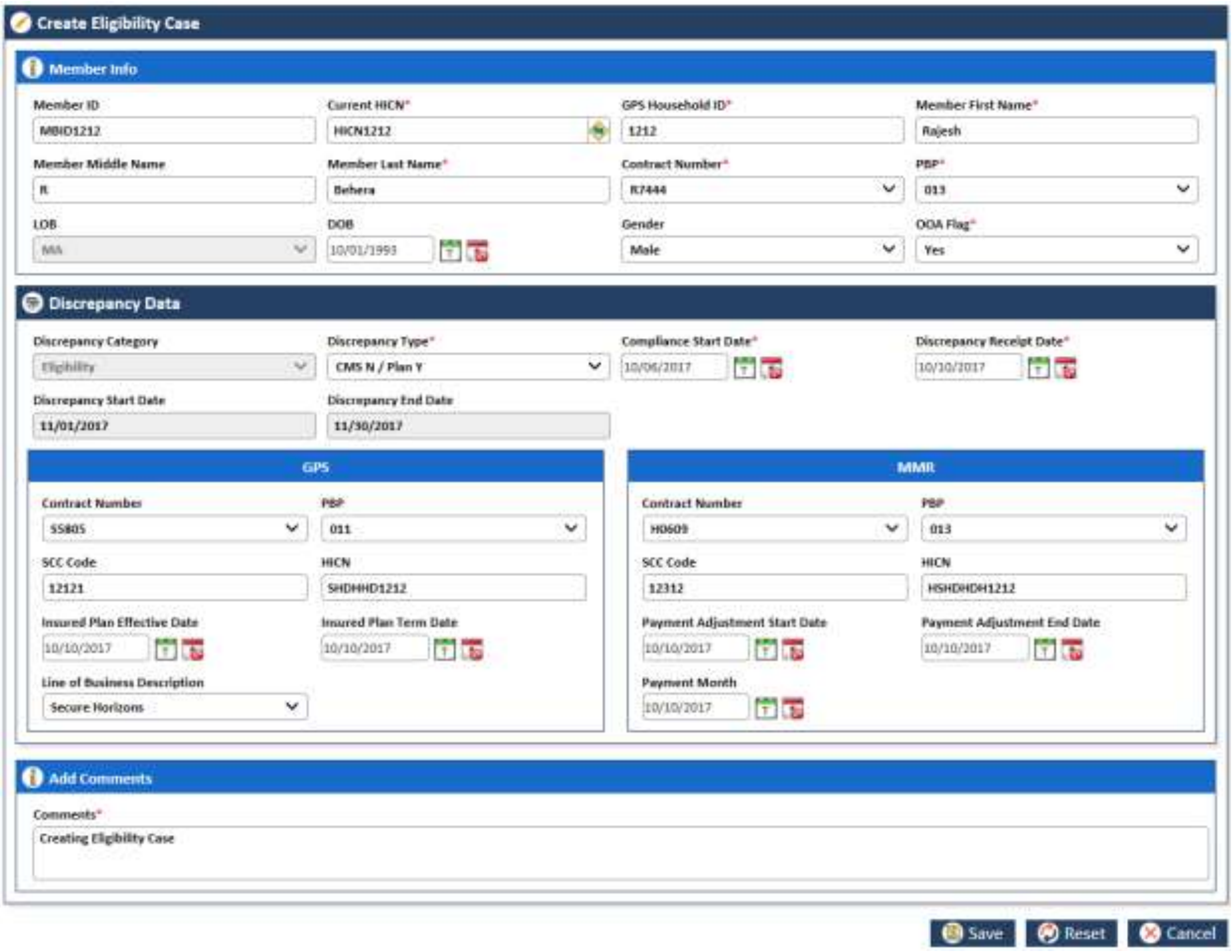


Figure 3-3: The Creating Eligibility Cases form>Discrepancy Data Section

Field Name	Description
Member Info section Provide the member detail in this section.	
Member ID	Enter the member ID in this field.
Current HICN	Enter the HICN number present in the form while creating the case. If you click **Get Member Info from web service** icon after entering the HICN, the following Member Info details are retrieved from GPS and auto-populated to in to the following fields. • Member ID • GPS Household ID • Member First Name • Member Last Name • BOB
MBI	Enter the member beneficiary identifier (MBI) in this field.
GPS Household ID	Enter the GPS Household ID in this field.
Member First Name	Enter the first name of the member. The maximum character limit is 35 in this field.
Member Last Name	Enter the last name of the member. The maximum character limit is 35 in this field.
Member Middle Name	Enter the middle name of the member. The maximum character limit is 35 in this field.
Contract Number	Select the contract number in this field. The contract numbers are five-character alphanumeric values that start

Field Name	Description
	with S, H or R. For example, S5917, R3444, and H7274. *If a user selects a contract number that starts with **H** or **R**, then the value **MA** appears in the **LOB** field. Similarly, if a user selects the contract number that starts with **S**, then the value **PDP** appears in the **LOB** field.*
LOB	The line of business values are auto-populated based on the values that you select in the **Contract Number** field. The values in this field are MA, and PDP.
DOB	Enter the date of birth of the member. You must enter the date in MM/DD/YYYY format.
Gender	Select your gender in this field.
OOA Flag	Enter the appropriate value in this field. Select the value **Yes**, if the GPS and /or MMR data available, or else select the value **No**.
Discrepancy Data tab The user enters the discrepancy details.	
Discrepancy Category	This field displays the discrepancy category. This field is defaulted to value that is the type of discrepancy you are creating based on the work basket. If you are creating **MMR Eligibility** case, this will be defaulted to the value **Eligibility**.
Discrepancy Type	This field displays the types of the discrepancy between the CMS and GPS data. The following value are available in this field: • **CMS N/Plan Y:** Select this field if the CMS data not available and Plan data is available • **CMS Y/Plan N:** Select this field if the CMS data available and Plan data is not available • **Contract:** Select this value if the discrepancy is contract related • **PBP**: Select this value if the discrepancy is plan benefit package related
Compliance Start Date	Enter the compliance start date. You must enter the date in MM/DD/YYYY format. You can enter current, past and future date.
Discrepancy Receipt Date	Enter the discrepancy start date. You must enter the date in MM/DD/YYYY format. Default date is displayed based on the **Compliance Start Date**. The discrepancy start date must be set as the first of the month; it can be first of the previous month or the next month. For example, if today is 11/19/2010 and the last Compliance Start Date is 10/25/2010 we should only be creating new discrepancies for 11/1/2010.
Discrepancy Start Date	Enter the discrepancy start date. You must enter the date in MM/DD/YYYY format. The default date in this field is based on the value selected in **Compliance Start Date** field. The discrepancy start date must be set as the first of the next month of the date selected in **Compliance Start Date.** For example, if today is 11/19/2010 and the last Compliance Start Date is 10/25/2010 we should only be creating new discrepancies for 11/1/2010.
Discrepancy End Date	Enter the discrepancy end date. You must enter the date in MM/DD/YYYY format. The default date in this field is based on the value selected in **Compliance Start Date** field. The discrepancy end date must be set

Field Name	Description
	as the last of the next month of the month & date selected in **Compliance Start Date**. For example, if today is 11/19/2010 and the last Compliance Start Date is 10/25/2010 we should only be creating new discrepancies for 11/31/2010.
GPS section The user enters the GPS member data details.	
GPS MBI	Enter the GPS Member Beneficiary Identifier (MBI) number in this field.
Contract Number	Select the contract number. Enter this value if GPS and/or MMR data is not available.
PBP	Select the PBP number. These are three-character numeric values. Enter this value if GPS and/or MMR data is not available.
SCC Code	Enter the State County Code. These are five-digit values. Enter this value if GPS and/or MMR data is not available.
HICN	Enter HICN in this field. Enter this value if GPS and/or MMR data is not available.
Insured Plan Effective Date	Enter the insured plan effective date. Enter this value if GPS and/or MMR data is not available.
Insured Plan Term Date	Enter the insured plan term date. Enter this value if GPS and/or MMR data is not available.
Line of Business Description	Select an appropriate value in the field. The following values are available in this field. • Erickson • Evercare • Harvard Pilgrim • MA • Medica • Oxford • PDP • SCO • Scot • Secure Horizons
MMR section The user enters the MMR member data details.	
MMR MBI	Enter the MMR MBI in this field.
Contract Number	Select the contract number. Enter this value if GPS and/or MMR data is not available.
PBP	Select the PBP number. Enter this value if GPS and/or MMR data is not available.
SCC Code	Enter the SSC code. Enter this value if GPS and/or MMR data is not available.
HICN	Enter HICN in this field. Enter this value if GPS and/or MMR data is not available.
Payment Adjustment Start Date	Enter the payment adjustment start date. Enter this value if GPS and/or MMR data is not available.
Payment Adjustment End Date	Enter the payment adjustment end date. Enter this value if GPS and/or MMR data is not available.
Payment Month	Enter payment month in this field. Enter this value if GPS and/or MMR data is not available.

Field Name	Description
Discrepancy Category	Select the appropriate value in this field. If you want to xxx, select the value Yes, or else select No. Enter this value if GPS and/or MMR data is not available.
Add Comments Tab The user enters the comments in this field.	
Comments	Provide your comments in this field.
Save button	Click this button to save the filled in form.
Reset button	Click this button to reset the entered data in the form.
Cancel button	Click this button to cancel the case creation process.

3.2.2 Creating DOB/Gender Cases

Creation of DOB or Gender eligibility suspect case helps you identify issues and discrepancies in data related to DOB and Gender data in MMR and GPS.

***Note**: The fields available in the Create DOC Case form and Create Gender Case forms are similar except the field value Gender in the GPS and MMR Section of the both forms.*

***Note**: All the fields marked with asterisk in the form are mandatory fields.*

Navigation (DOB Case form):

To access the **Create DOB Case** form, go to the **Application** menu, point to **Eligibility>DOB** sub-menu and click the **Create Suspect Case** link. The **Create DOB Case** form appears.

Navigation (Gender Case form):

To access the **Create Gender Case** form, go to the **Application** menu, point to **Eligibility>Gender** sub-menu and click the **Create Suspect Case** link. The **Create Gender Case** form appears.

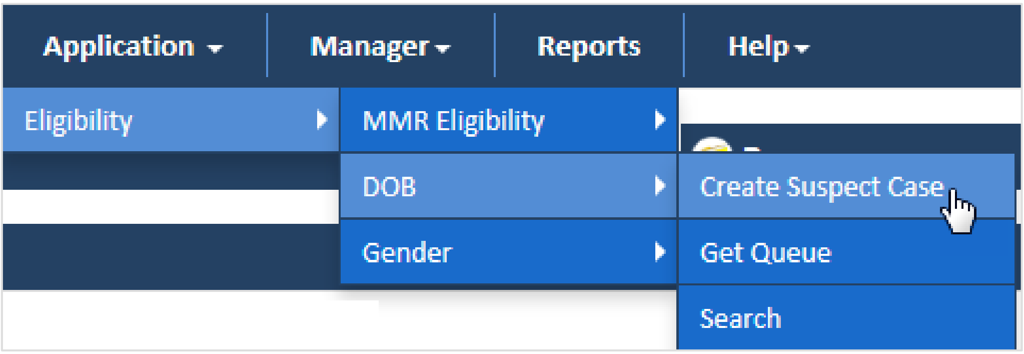


Figure 3-4: The Eligibility>DOB> Create Suspect Case link

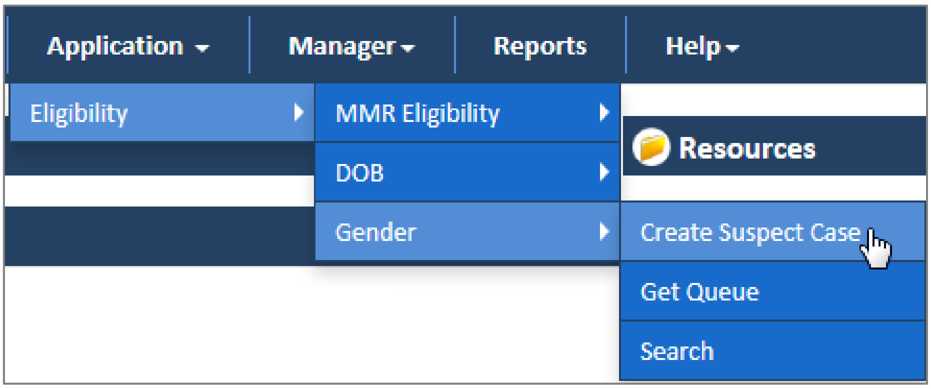


Figure 3-5: The Eligibility>Gender> Create Suspect Case link

3.2.2.1 Create DOB Case form

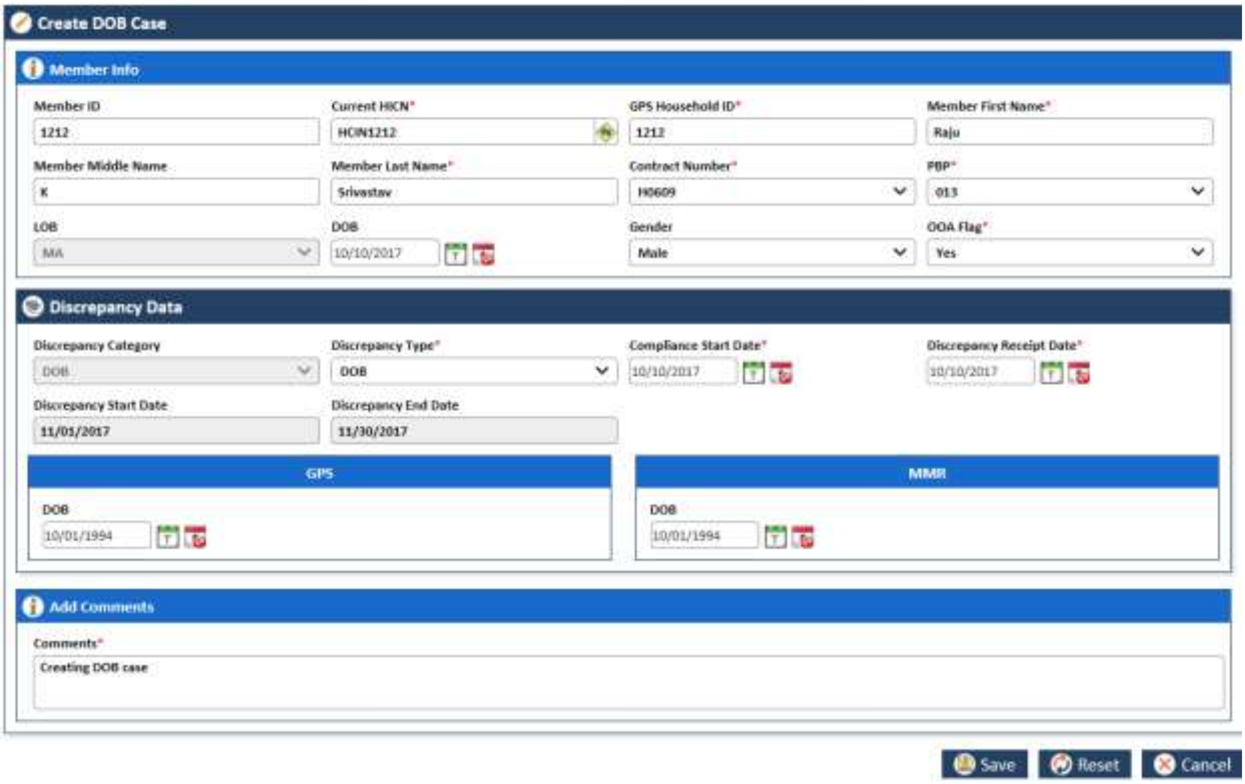


Figure 3-6: The Create DOB Case form

3.2.2.2 The Create Gender Case form

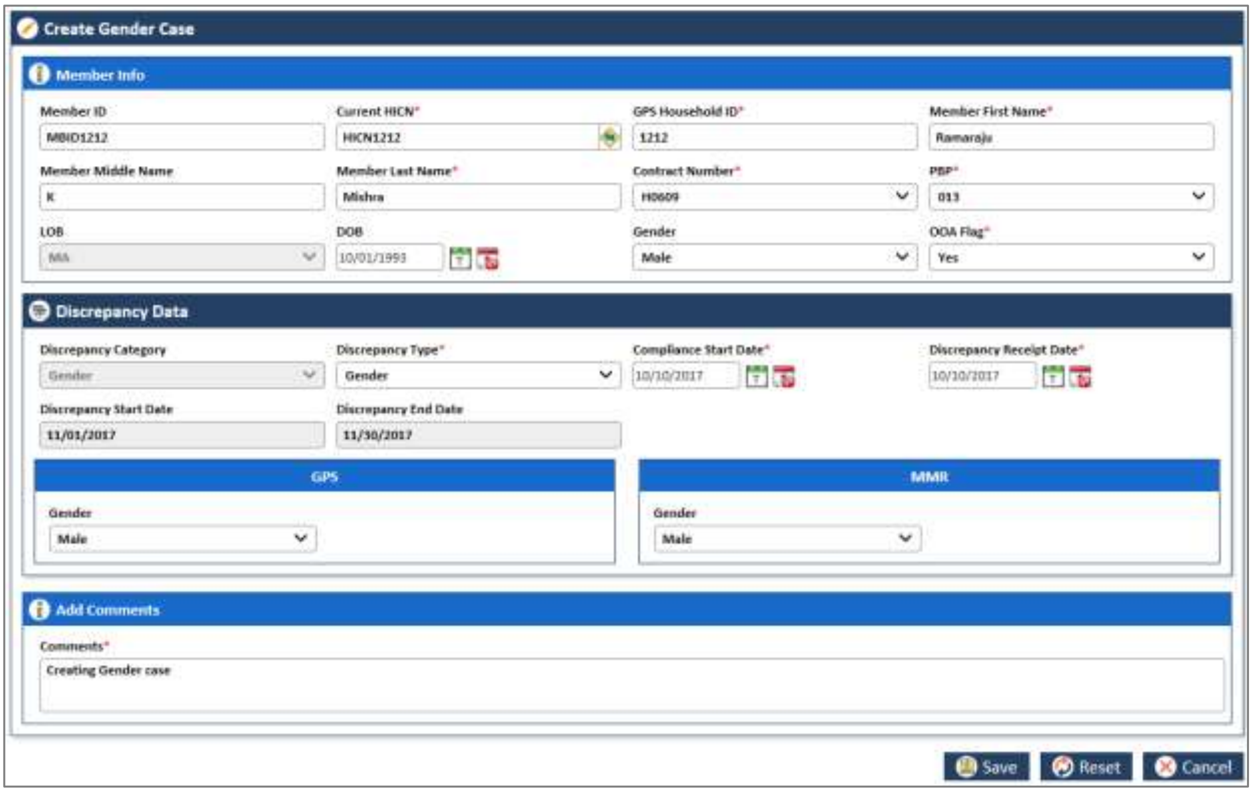


Figure 3-7: The Create Gender Case form

Field Name	Description
Member Info section Provide the member detail in this section.	
Member ID	Enter the member ID in this field.

Field Name	Description
Current HICN	Enter the HICN number present in the form while creating the case. If you click **Get Member Info from web service** icon after entering the HICN, the following Member Info details are retrieved from GPS and auto-populated to in to the following fields. • Member ID • GPS Household ID • Member First Name • Member Last Name • BOB
MBI	Enter the BMI in this field.
GPS Household ID	Enter the GPS Household ID in this field.
Member First Name	Enter the first name of the member. The maximum character limit is 35 in this field.
Member Last Name	Enter the last name of the member. The maximum character limit is 35 in this field.
Member Middle Name	Enter the middle name of the member. The maximum character limit is 35 in this field.
Contract Number	Select the contract number in this field.
PBP	Select the PBP number in field.
LOB	Select the LOB in this field. The following values are available in this field. • Erickson • Evercare • Harvard Pilgrim • MA • Medica • Oxford • PDP • SCO • SCOT • Secure Horizons
DOB	Enter the date of birth of the member. You must enter the date in MM/DD/YYYY format.
Gender	Select your gender in this field.
OOA Flag	Enter the appropriate value in this field. Select the value **Yes**, if the GPS data available, or else select the value **No**.
Discrepancy Data The user enters the discrepancy details.	
Discrepancy Category	This field displays the discrepancy category. *In the **Create Gender Case** form, the value **Gender** is defaulted in this field. Similarly, in the **Create DOB Case** form, the value **DOB** is defaulted.*
Discrepancy Type	Select the type of discrepancy in this field. *The value **Gender** is available in the **Create Gender Case** form and value **DOB** is available in the **Create DOB Case** form this field*
Discrepancy Receipt Date	Enter the discrepancy start date. You must enter the date in MM/DD/YYYY format. The default date is decided based on the Compliance Start Date. The discrepancy start date must be set as the first of the month; it can be first of the previous month or the coming moth. For example, if today is 11/19/2010 and the last Compliance Start Date is

Field Name	Description
	10/25/2010 we should only be creating new discrepancies for 11/1/2010.
Discrepancy Start Date	Enter the discrepancy start date. You must enter the date in MM/DD/YYYY format. The default date in this field is based on the value selected in **Compliance Start Date** field. The discrepancy start date must be set as the first of the next month of the month & date selected in **Compliance Start Date.** For example, if today is 11/19/2010 and the last Compliance Start Date is 10/25/2010 we should only be creating new discrepancies for 11/1/2010.
Discrepancy End Date	Enter the discrepancy end date. You must enter the date in MM/DD/YYYY format. The default date in this field is based on the value selected in **Compliance Start Date** field. The discrepancy end date must be set as the last of the next month of the month & date selected in **Compliance Start Date**. For example, if today is 11/19/2010 and the last Compliance Start Date is 10/25/2010 we should only be creating new discrepancies for 11/31/2010.
GPS/MMR section The user enters the MMR member data details.	
DOB	Select the contract number. This field is available in the GPS and/or MMR section of the Create DOB Case form.
Gender	Select the value in the field. The field is available in the GPS and/or MMR section of the Create Gender Case form.
Add Comments section The user enters the comments in this field.	
Comments	Provide your comments in this field.
Save button	Click this button to save the filled in form.
Reset button	Click this button to reset the entered data in the form.
Cancel button	Click this button to cancel the case creation process.

3.3 OST Suspect Cases

As an ERS user, you can create OST suspect cases to mitigate the issues and discrepancies with regard to OOA, SCC, and TRR. Using OST work basket, a user can create OOA, SCC, and TRR cases.

Suggestions: *Before creating the OST suspect cases, the users must login the application using the **OST** work basket and a role which has access rights to the OST module.*

A user can create an OOA case, in the following scenarios:

- Undeliverable mails
- Change of address
- Out of area
- Undeliverable mail – with/without forwarding address

A user can create a SCC case, in the following scenarios:

- Incarceration notice
- In area move
- OOA

A user can create a TRR case, in the following scenarios:

- Incarceration notice

- In area move

3.3.1 Creating OOA Cases

You can create OOA case, when you identify issues and discrepancies with member data of a member who becomes out of area where the service is provided. When the communication are not responded or replied, you need to ensure member is in the area where service is available. You can mitigate these issues by creating ta OOA case using Create OOA Case form.

***Note**: All the fields marked with asterisk in the form are mandatory fields.*

Navigation:

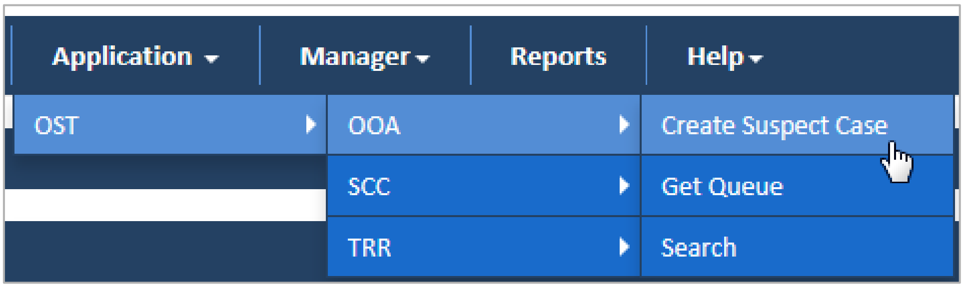


Figure 3-8: Accessing Create OOA Form

To access the **Create OOA Case** form, go to the **Application** menu, point to **OST>OAA** sub-menu, and click the Create Suspect Case link. The **Create OOA Case** form appears.

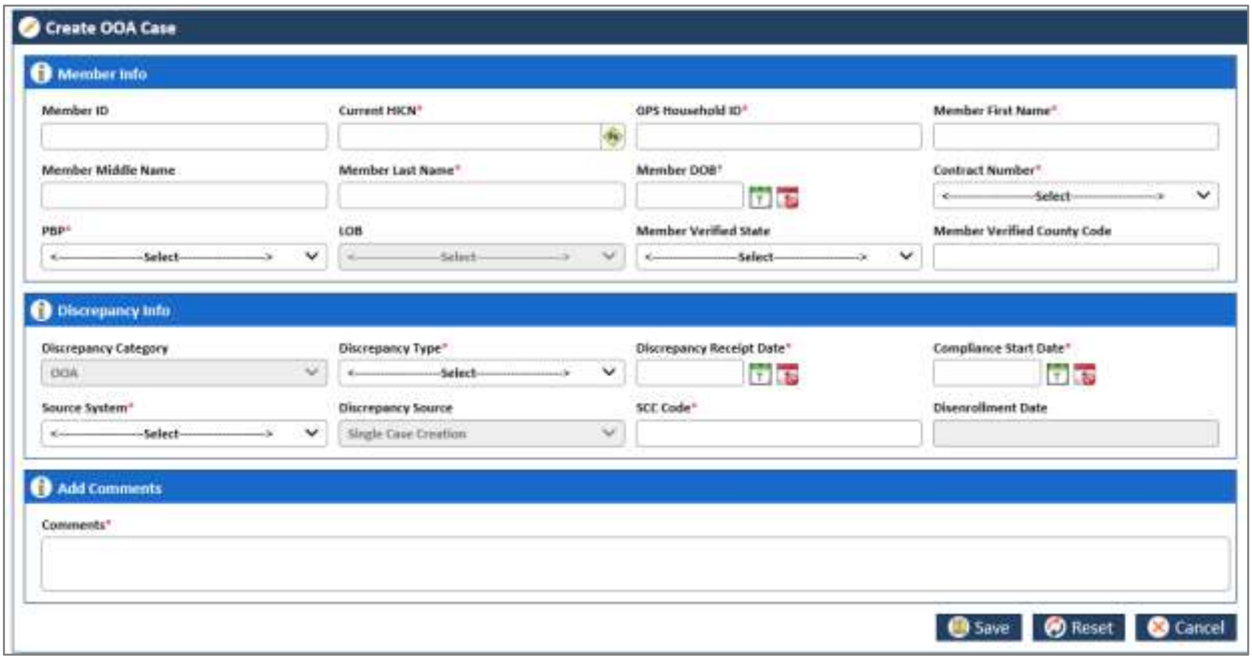


Figure 3-9: The Create OOA Case form

3.3.1.1 The Create OOA Case form> Member Info Tab

Figure 3-10: The Create OOA Case form> Member Info Tab

Field Name	Description

Field Name	Description
Member Info section Provide the member detail in this section.	
Member ID	Enter the member ID in this field.
Current HICN	Enter the HICN number present in the form while creating the case. If the user clicks **Get Member Info from web service** icon after entering the HICN, the following Member Info details are retrieved from GPS and auto-populated to in to the corresponding fields. • Member ID • GPS Household ID • Member First Name • Member Last Name • BOB
Current MBI	Enter the current BMI in this field.
GPS Household ID	Enter the GPS Household ID in this field.
Member First Name	Enter the first name of the member. The maximum character limit is 35 in this field.
Member Last Name	Enter the last name of the member. The maximum character limit is 35 in this field.
Member Middle Name	Enter the middle name of the member. The maximum character limit is 35 in this field.
DOB	Enter the date of birth of the member. You must enter the date in MM/DD/YYYY format.
Contract Number	Select the contract number in this field. The contract numbers are five-character alphanumeric values that starts with S, H or R. For example, S5917, R3444, and H7274. *If the user selects a contract number that starts with **H** or **R**, then the value **MA** appears in the **LOB** field. Similarly, if the user selects the contract number that starts with **S**, then the value **PDP** appears in the **LOB** field.* *Selection of this value directly affects the date value in the **Disenrollment Date** field. If the user selects a contract number that starts with **H** or **R**, the value **Disenrollment Date** field changes to date that six later to the current date. For example, if the current date is 8/10/2017 then the **Disenrollment Date** field displays the value 2/10/2018.* *If the user selects a contract number that starts with **S**, the value **Disenrollment Date** field changes to date that is twelve months later to the current date. For example, if the current date is 8/10/2017 then the **Disenrollment Date** field displays the value 8/10/2018.*
PBP	Select the PBP number in field. These are three-digit numbers.
LOB	The values in the field are auto-populated based on the values that you select in the Contract number field. The values in this field are **MA**, and **PDP**.
Member Verified State	Select the member verified state in this field. The states names are marked with two-lettered codes.
Member Verified County Code	Enter the member verified county code in this field. You enter a code number of the three numbers.

3.3.1.2 The Create OOA Case form> Discrepancy Tab

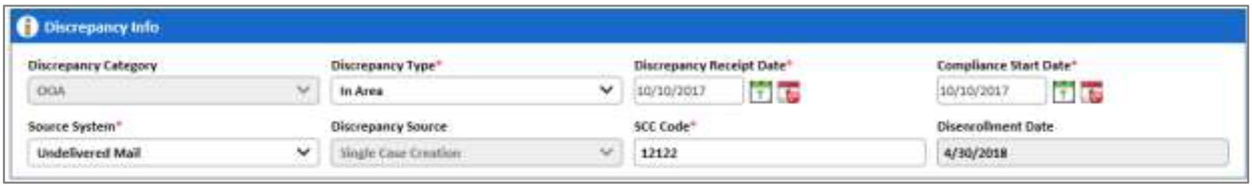


Figure 3-11: The Create OOA Case form> Discrepancy Info Tab

Field Name	Description
Discrepancy info The user enters the discrepancy details.	
Discrepancy Category	This field displays the discrepancy category. *In the **Create OOA Case** form, the value **OOA** is defaulted in this field. Similarly, in the **Create SSC Case** form, the **Create TRR Case** form value **SSC and TRR** is defaulted, respectively.*
Discrepancy Type	Select the type of discrepancy in this field. The following values are available in this field. • OOA • In Area • Incarcerated
Discrepancy Receipt Date	Enter the discrepancy start date. You must enter the date in MM/DD/YYYY format. The default date is decided based on the Compliance Start Date. The discrepancy start date must be set as the first of the month; it can be first of the previous month or the coming moth. For example, if today is 11/19/2010 and the last Compliance Start Date is 10/25/2010 we should only be creating new discrepancies for 11/1/2010.
Compliance Start Date	Enter the compliance start date. You must enter the date in MM/DD/YYYY format. You can enter current, past and future date.
Source System	Select the name of the source that triggers discrepancies. The following values are available in this field: • COA • GPS • MIIM • Undelivered Mails
Discrepancy Source	This field value is defaulted to **Single Case Creation**.
SCC Code	Enter a five-letter SCC code in this field.
Disenrollment Date	The value in this field is auto-populated based on the value selected in the field **Contract Number**.

3.3.1.3 The Create OOA Case form> Add Comments Section

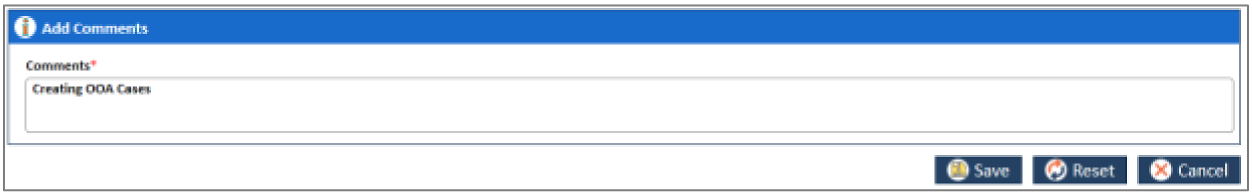


Figure 3-12: The Create OOA Case form> Add Comments Section

Field Name	Description
Add Comments section The user enters the comments in this field.	
Comments	Provide your comments in this field.

Save button	Click this button to save the filled in form.
Reset button	Click this button to reset the entered data in the form.
Cancel button	Click this button to cancel the case creation process.

3.3.2 Creating SSC Cases

You can create State County Code (SSC) case to identify discrepancy related to state county code pertaining to a member data. This helps you mitigate the information mismatch related this unique code between CMS and GPS and rectify the errors.

To create SSC case, you need to access the **Create SSC Case** form.

***Note**: All the fields marked with asterisk in the form are mandatory fields.*

Navigation:

To access the Create SSC Case form, go to the Application menu, point to OST>SSC sub-menu and d click the Create Suspect Case. The Create SSC Case form appears.

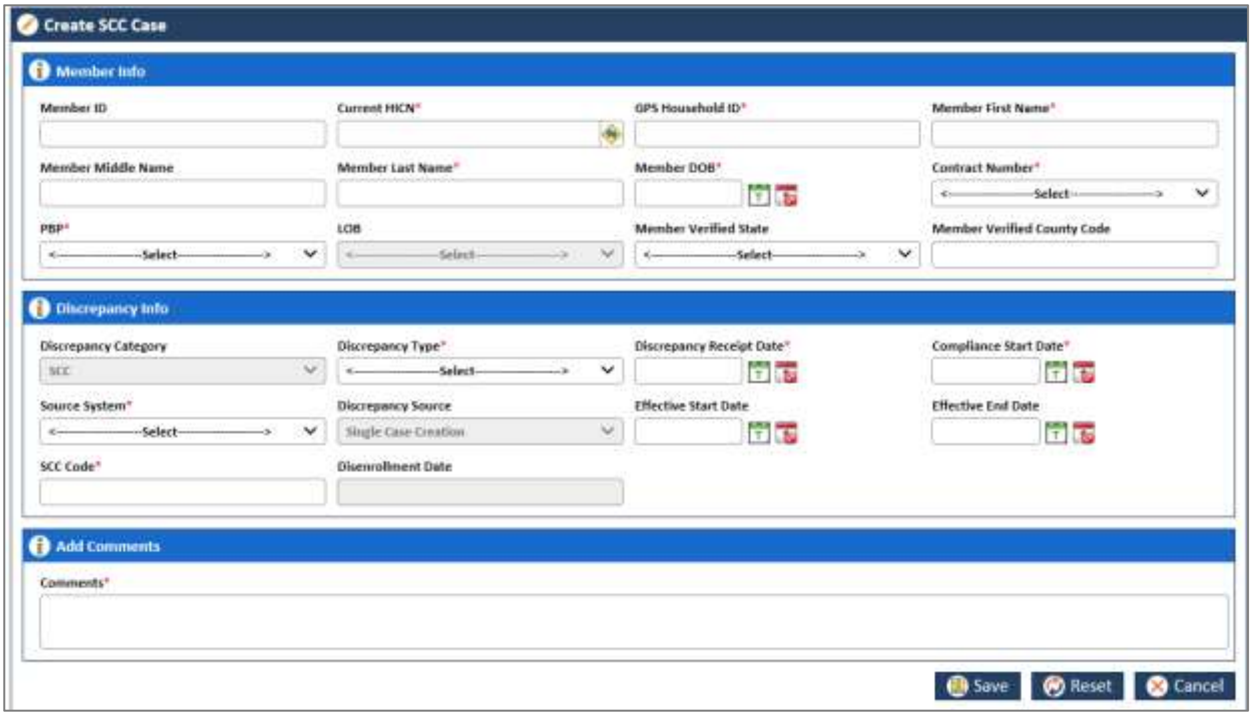


Figure 3-13: The Create SSC Case form

3.3.2.1 The Create SSC Case form> Member Info Tab

The fields in **Member Into tab** are similar to the Member Into tab of the **Create OOA Case** form. For more information, refer to The Create OOA Case form> Member Info Tab section.

3.3.2.2 The Create SSC Case form> Discrepancy Tab

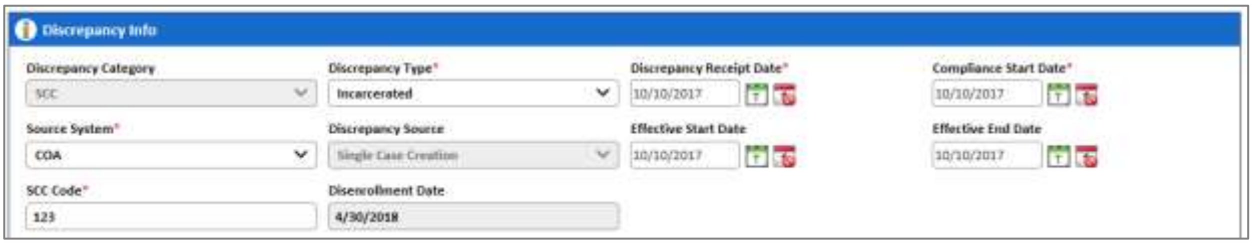


Figure 3-14: The SSC Case for>Discrepancy Info tab

Field Name	Description

Field Name	Description
Discrepancy info The user enters the discrepancy details.	
Discrepancy Category	This field displays the discrepancy category. *In the **Create OOA Case** form, the value **OOA** is defaulted in this field. Similarly, in the **Create SSC Case** form, the **Create TRR Case** form value **SSC and TRR** is defaulted, respectively.*
Discrepancy Type	Select the type of discrepancy in this field. The following values are available in this field. • OOA • In Area • Incarcerated
Discrepancy Receipt Date	Enter the discrepancy start date. You must enter the date in MM/DD/YYYY format. The default date is decided based on the Compliance Start Date. The discrepancy start date must be set as the first of the month; it can be first of the previous month or the coming moth. For example, if today is 11/19/2010 and the last Compliance Start Date is 10/25/2010 we should only be creating new discrepancies for 11/1/2010.
Compliance Start Date	Enter the compliance start date. You must enter the date in MM/DD/YYYY format. You can enter current, past and future date.
Source System	Select the name of the source that triggers discrepancies. The following values are available in this field: • COA • GPS • MIIM • Undelivered Mails
Effective Start Date	Enter the effective start date of the SSC discrepancy.
Effective End Date	Enter the effective end date of the SSC discrepancy.
Discrepancy Source	This field value is defaulted to Single Case Creation.
SCC Code	Enter a five-letter SCC code in this field.
Disenrollment Date	The value in this field is auto-populated based on the value selected in the field Contract Number.

3.3.2.2.1 The Create SSC Case form> Add Comments Section

For more information, refer to The Create OOA Case form> Add Comments Section.

3.3.3 Creating TRR Cases

You can create Transaction Retroactive Report (TRR) case in case there is an issue with respect to change in address, disenrollment and SSC case mismatch. Creating the cases you can ensure correcting all the issues in these areas and rectifying data mismatch issues in the CMS and GPS.

***Note**: All the fields marked with asterisk in the form are mandatory fields.*

Navigation:

To access the **Create TRR Case** form, go to the **Application** menu, point to **OST>TRR** sub-menu and click the **Create Suspect Case**. The **Create TRR Case** form appears.

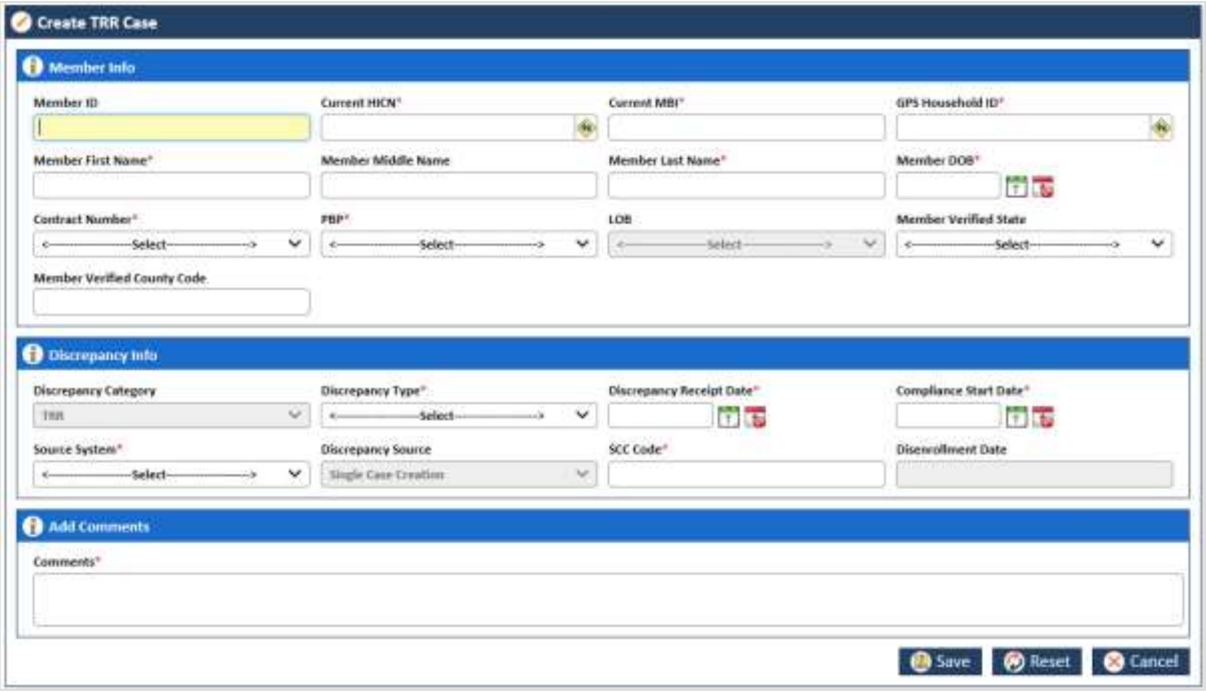


Figure 3-15: The Create TRR Case form

3.3.3.1.1 The Create TRR Case form> Member Info Tab

Figure 3-16: The Create TRR Case form> Member Info Tab

For more information, refer to The Create OOA Case form> Member Info Tab section.

3.3.3.1.2 The Create TRR Case form> Discrepancy Info Tab

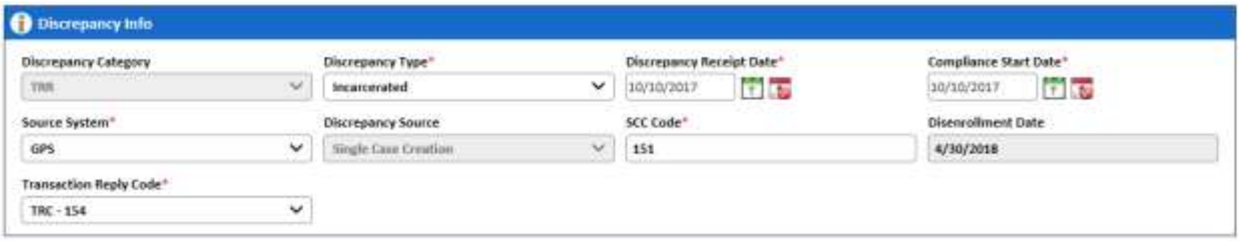


Figure 3-17: The Create TRR Case form

The fields available in this tab are same with the **Discrepancy Info** tab of the **Create OOA Case** form except the value in **Discrepancy Category** and **Transaction Code** field. The value in the **Discrepancy Category** is defaulted to TRR.

Based on the value you select in the **Transaction Code** field, the respective queues are generated. The following values are available in this field.

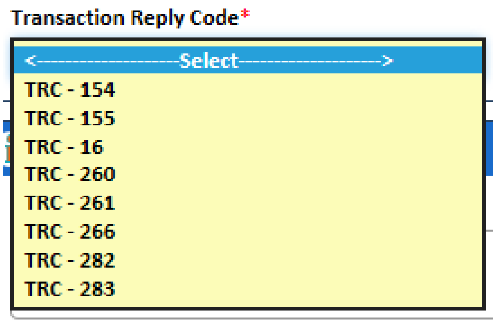


Figure 3-18: Transaction Code field

For more information, refer to The Create OOA Case form> Discrepancy Tab section.

3.3.3.1.3 The Create TRR Case form> Add Comments Section

For more information, refer to The Create OOA Case form> Add Comments Section.

3.3.4 RPR Suspect Cases

You can create Retrospective Process Records (RPR) to rectify the data mismatch issues between the CMS and GPS. If you process the records with certain data which is not created or not available in the CMS, you need to rectify the issues. You need rectify the data issues either in CMS or GPS. Incase disenrollment, and termination of the member, you need instate member data and reactivate the member in the CMS.

***Note**: All the fields marked with asterisk in the form are mandatory fields.*

3.3.4.1 Creating RRP cases

Navigation:

To access the **Create TRR Case** form, go to the **Application** menu, point to **OST>RPR** sub-menu and click the **Create Suspect** Case. The **Create RPR Case** form appears.

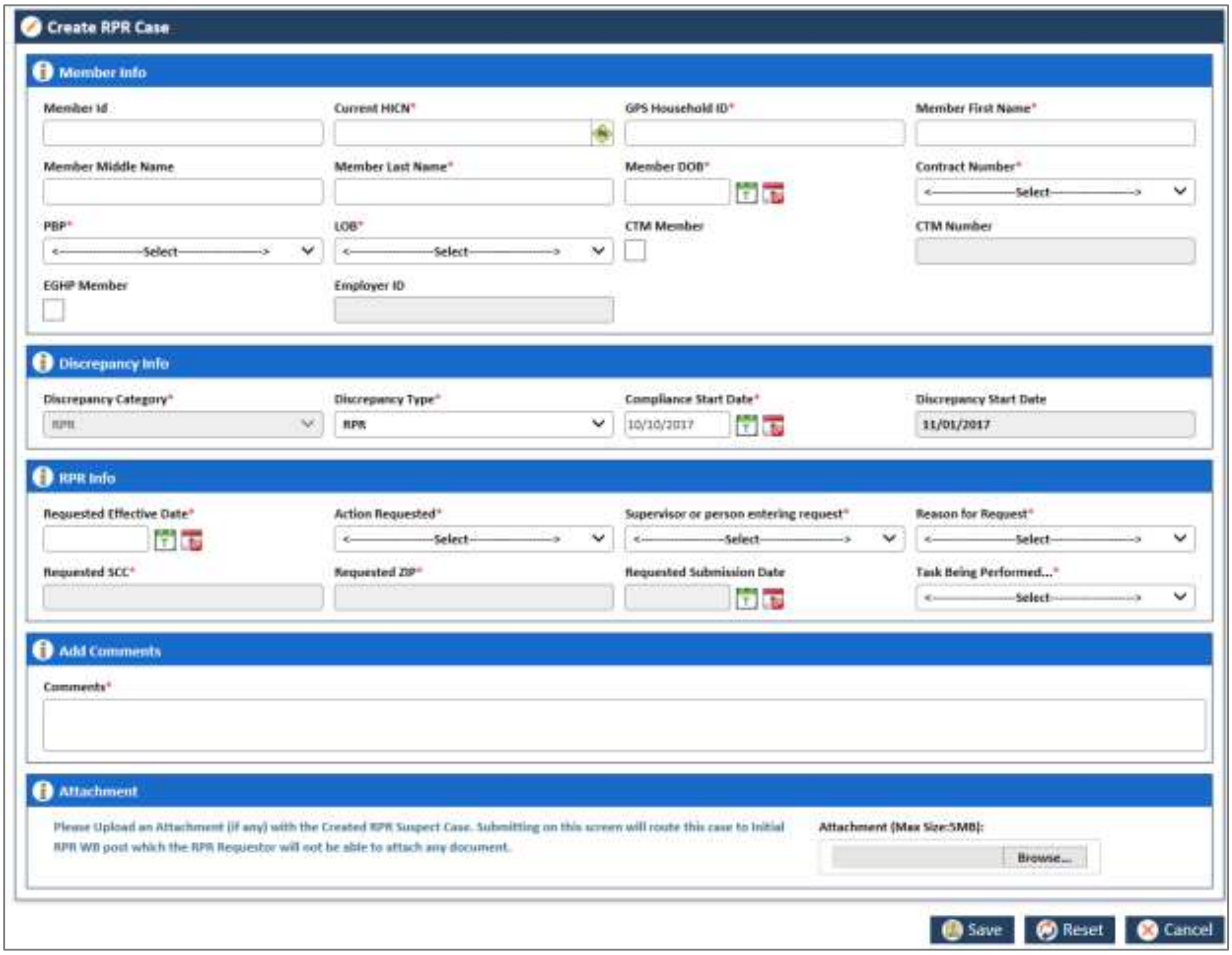


Figure 3-19: The Create RPS Case form

3.3.4.1.1 The Create TRR Case form> Member Info Tab

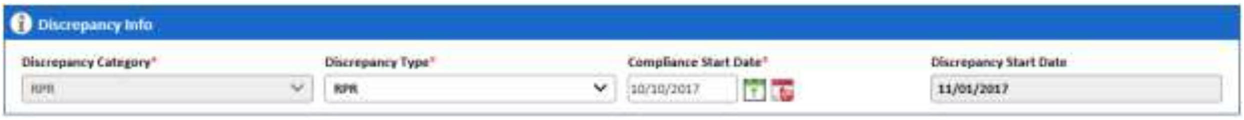
Figure 3-20:

Field Name	Description
Member Info section Provide the member detail in this section.	
Member ID	Enter the member ID in this field. This field becomes mandatory field if Current HICN or GPS Household ID is not entered. If the user clicks **Get member info from Web** icon after entering the Member ID, the following Member Info details are auto-populated from GPS to in to the corresponding fields. • Current HICN • GPS Household ID • Member First Name • Member Last Name • BOB

Field Name	Description
Current HICN	Enter the HICN number present in the form while creating the case. If the user clicks **Get member info from Web** icon after entering the HICN, the following Member Info details are retrieved from GPS and auto-populated to in to the corresponding fields. • Member ID • GPS Household ID • Member First Name • Member Last Name • BOB
MBI	Enter the current BMI in this field.
GPS Household ID	Enter the GPS Household ID in this field. This becomes a mandatory field if value in Current HICN or Member ID is not entered. If the user clicks **Get member info from Web** icon after entering the GPS House Hold ID, the following Member Info details are retrieved from GPS and auto-populated to in to the corresponding fields. • Member ID • Current HICN • Member First Name • Member Last Name • BOB
Member First Name	Enter the first name of the member. The maximum character limit is 35 in this field.
Member Last Name	Enter the last name of the member. The maximum character limit is 35 in this field.
Member Middle Name	Enter the middle name of the member. The maximum character limit is 35 in this field.
Member DOB	Enter the date of birth of the member. You must enter the date in MM/DD/YYYY format.
Contract Number	Select the contract number in this field. The contract numbers are five-character alphanumeric values that starts with S, H or R. For example, S5917, R3444, and H7274. *If the user selects a contract number that starts with **H** or **R**, then the value **MA** appears in the **LOB** field. Similarly, if the user selects the contract number that starts with **S**, then the value **PDP** appears in the **LOB** field.* *Selection of this value directly affects the date value in the **Disenrollment Date** field. If the user selects a contract number that starts with **H** or **R**, the value **Disenrollment Date** field changes to date that six later to the current date. For example, if the current date is 8/10/2017 then the **Disenrollment Date** field displays the value 2/10/2018.* *If the user selects a contract number that starts with **S**, the value **Disenrollment Date** field changes to date that is twelve months later to the current date. For example, if the current date is 8/10/2017 then the **Disenrollment Date** field displays the value 8/10/2018.*
PBP	Select the PBP number in field. These are three-digit numbers.
LOB	The values in the field are auto-populated based on the values that you select in the Contract number field. The values in this field are MA, and PDP.

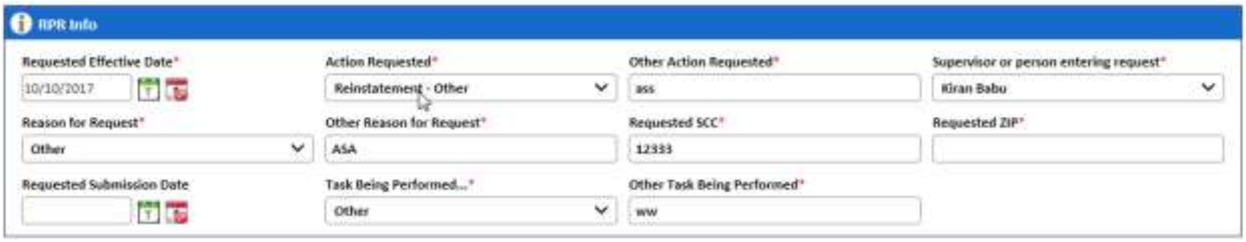
Field Name	Description
Member Verified State	Select the member verified state in this field. The states names are marked with two-lettered codes.
CTM checkbox	Select the check box to enter values in the CTM Number field.
CTM Number	Enter the CTM number in this field.
EGHP Member	Select the check box to enter the value the Employee ID field.
Employer ID	Enter the employer id in this field.

3.3.4.1.2 The Create TRR Case form> Discrepancy Info Tab



Discrepancy info The user enters the discrepancy details.	
Discrepancy Category	This field displays the discrepancy category. *In the **Create RPR Case** form, the value **RPR** is defaulted in this field. Similarly, in the **Create SSC Case** form, the **Create TRR Case** form value **SSC and TRR** is defaulted, respectively.*
Discrepancy Type	Select the type of discrepancy in this field. The following values are available in this field. • RPR • SCR RPR
Compliance Start Date	Enter the compliance start date. You must enter the date in MM/DD/YYYY format. You can enter current, past and future date.
Discrepancy Star Date	Select the discrepancy start date in this field.

3.3.4.1.3 The Create TRR Case form> TPR Info Section



RPR info	
Requested Effective Date	Select the requested effective dates this field.
Action Requested	Select the requested action in this field. If you select the value **Reinstatement- Others** in this field, the **Other Action Requested** field appears.
Other Action Requested (appears if you select the value **Reinstatement- Others** in this field, the **Other Action Requested** field)	Enter the action value in this field.
Supervisor or person entering request	Select the name of the super visor in this field.
Reason for Request	**Select reason for request in this field. If you select the value** Other **in** the Reason for Request **field, the Other Reason for Request field** appears.
Other Reason for Request (Appears if you select the value **Other** in **the Reason for Request**	Enter the other reason for the request.

field)	
Requested SCC	Enter the requested SSC code.
Requested ZIP	Enter the requested zip.
Requested Submission Date	Select the requested submission date.
Task Being Performed...	Select the task being performed.
Other Task Being Performed (Appears if you select the value **Other** in **Task Being Performed...**field)	Enter the other task being performed.

3.3.4.1.4 The Create TRR Case form> Add Comments Section

Add Comments section The user enters the comments in this field.	
Comments	Provide your comments in this field.
Attachment	Attached the required file in this field.
Save button	Click this button to save the filled in form.
Reset button	Click this button to reset the entered data in the form.
Cancel button	Click this button to cancel the case creation process.

Chapter 4 ERS Queues

This chapter provides details on various queues available in the ERS application and their related work flows. This provides details on various types of queues and the methods to access those queues. This also discusses how to search the queues in the application through advanced search option.

This chapter contains the following section:

4.1 ERS Queue Overview

Queues are the work assignments or notifications available in the application to take action on the created and in-progress cases in various ERS workflows. Users with appropriate access rights can access and process the specific queues. This processing or reviewing of the cases in the queues helps completing ERS workflows to ensure enrolment reconciliation processes are properly executed. Queues are the most integral part of the ERS workflow that decides the statuses of various reconciliation work flows.

Based on the user access rights and permissions, the user can view work items as queues or they can directly access the queue from the ERS application.

4.1.1 Types of queues

Queues are broadly divided into three types based on their case categories, statuses, and record ages. These are Processing Queue, Holding Queues, and Completed Queue. While you can work on the Processing Queues, you can only view Holding Queues and Completed Queues and their related reports.

4.1.1.1 Processing queues

The cases which are currently in progress and pending various action during a particular workflow are called processing queues. If created cases are resolved completely, CMS responses are received, transactions are accepted, and cases are closed, then these cases can changed to holding queue or completed.

4.1.1.1.1 Accessing Processing Queues

You can access the processing queue forms before you work on various cases in the process flow.

To access the processing queues:

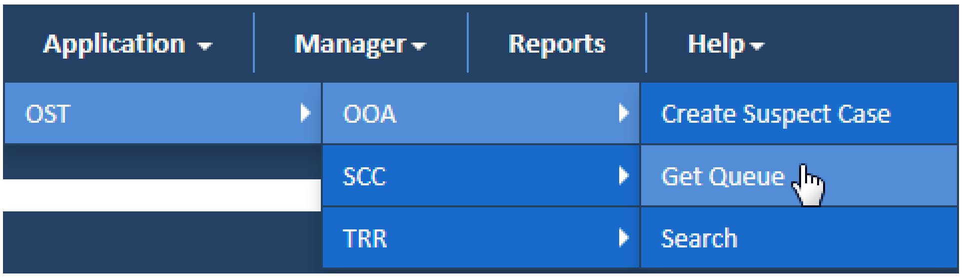


Figure 4-1: Access the Work Item <Module Name>

1. Go to Application menu, point to **<module name> → <sub-module name>** and click the **Get Queue** link. The **<module Name> Queue Summary** page appears.

> ***Note**: The module name is considered as work basket and the sub-module name is considered as discrepancy category.*

For example, if you want access the OOA queue, go to **Application**, point to **OST→OOA** and then click the **Get Queue** link. The **OOA Queue Summary** page appears.

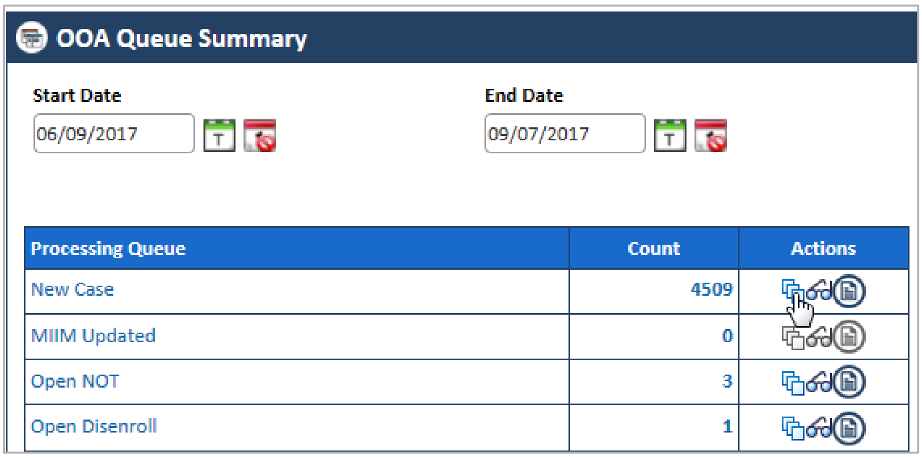


Figure 4-2: The OOA Queue Summary

2. Under the **Actions** column, click the **Get Queue** icon (corresponding to a count) in line with the listed processing queues.

The **Work Item – <Module Name>** page appears. For example, if you click the get queue icon for OOA queue, the **Work Item – OOA** page appears.

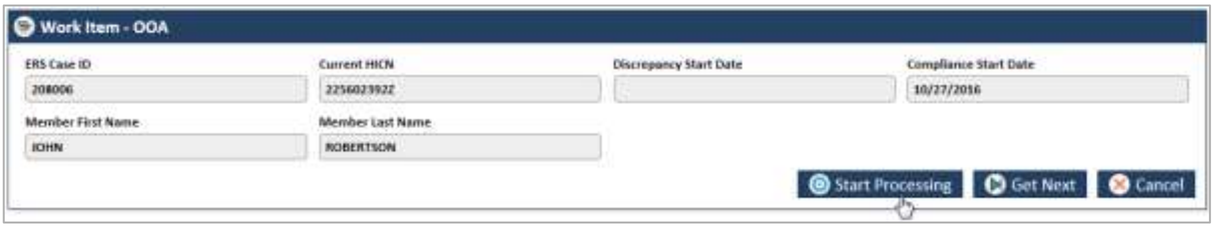


Figure 4-3: Work Item - OOA

3. Click the **Start Processing** button to open the **<Module Name> Process Work** form. For Example, if you click the **Start Processing** button for **Work Item – OOA** page, the **OOA Process Work** form appears.
4. Click the **Get Next** in the **Work Item – OOA** page to open the next work item.

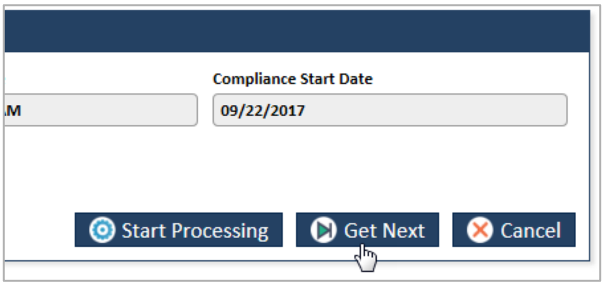


Figure 4-4: The Get Next button

5. Click **Cancel** button in the **Work Item – OOA** page to cancel the process of accessing the queue forms.

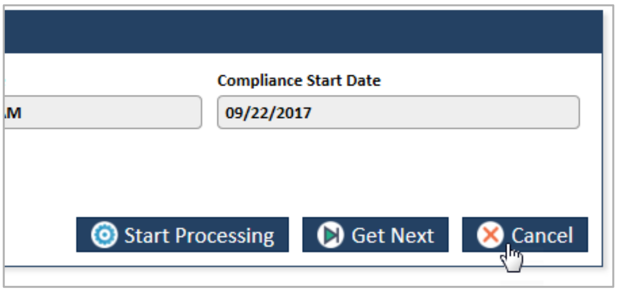


Figure 4-5: The Cancel button

For more information, refer to the Navigation section, Working on OOA Queues section.

4.1.1.1.2 Viewing Processing Queues

To view the processing queues:

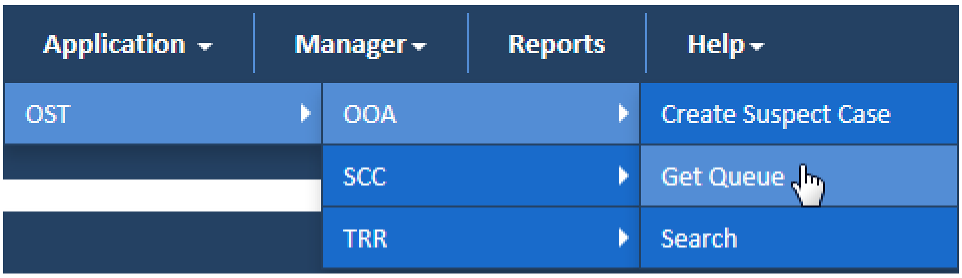


Figure 4-6: Access the Work Item <Module Name>

1. Go to Application menu, point to <module name> →<sub-module name> and click the Get Queue link. The <Queue Name> Queue Summary page appears.

For example, if you want access the OOA queue, go to **Application** menu point to **OST→OOA** and then click the **Get Queue** link.

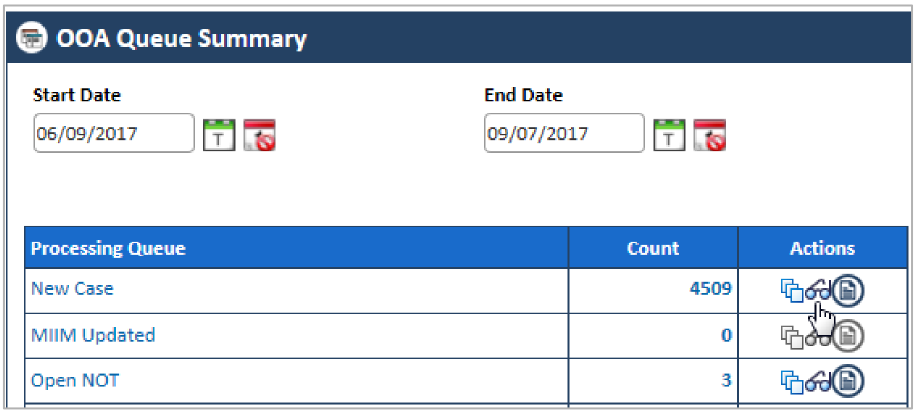


Figure 4-7: The OOA Queue Summary> View Queue icon

2. Under the **Actions** column, click the view queue icon (corresponding to a count) in line with the listed processing queues.

The **Search** page appears along with **Advanced Search** section and **Search Results** table. For example, if you click the **View Queue** icon for OOA queue, the **Search** page appears along with OOA queue list.

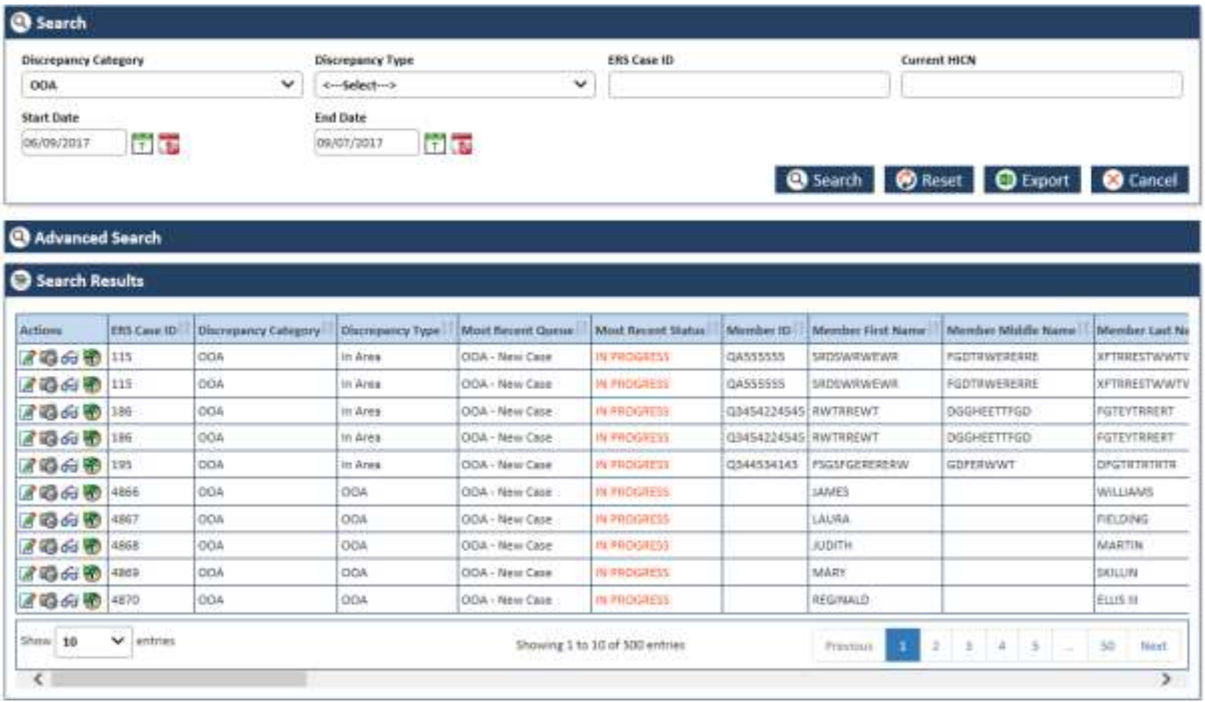


Figure 4-8: OOA Search Window and Search Results

3. Click the **Edit Record** icon in **Actions** column of the **Search Results** table to open the **OOA Process Work** form. The **OOA Process Work** form appears.

You can click the following icons to take appropriate action in the stage:

- **Edit Record** icon: Click the **Edit Record** icon to open the form for editing. The process work form appears in editable mode. You edit the form by selecting different actin values.
- **Reopen Record** icon: Click the **Reopen Record** icon to reopen the form for editing. The record gets opened.
- **View Record** icon: Click the **View Record** icon to view the form process work form. The form appears in un-editable mode.
- **View History** icon: Click the **View History** icon to view the history of the queues. It helps opening the Queue History Report. For more information on History Report, refer to the ERS

History Reports section.

4. You can edit the queue by selecting different action value in the **Actions** field.

For more information, refer to the Navigation section, in the Working on OOA Queues section.

4.1.1.1.3 Viewing Reports

To view reports:

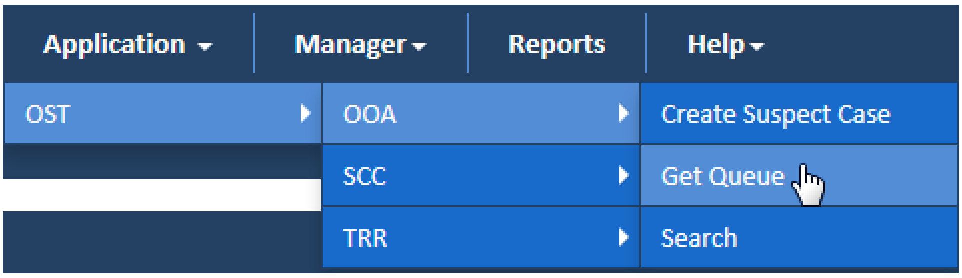


Figure 4-9: Access the Work Item <Module Name>

1. Go to Application menu, point to <module name> →<sub-module name> and click the Get Queue link. The <Queue Name> Queue Summary page appears.

For example, if you want access the OOA queue, go to **Application** menu point to **OST→OOA** and then click the **Get Queue** link.

Processing Queue	Count	Actions
New Case	952	
MIIM Updated	8	
Open NOT	2	
Open Disenroll	1	
MARx Address Letter	3	

Figure 4-10: The OOA Queue Summary> Queue Icon

2. Under the **Action** column, click the view queue icon (corresponding to a count) in line with the listed processing queues.

Report Image Place holder. Not available now

Figure 4-11: Report XXXXX

4.1.1.2 Holding Queues

Holding queue are special queues which are not processed in the ERS application. Rather, these cases are reviewed and worked on by third party entities in backend. Based on the last status of the cases, the respective actions are taken on these queues.

4.1.1.2.1 Viewing Holding Queues

Viewing queue process is similar for all the queues. For more information on viewing queues, refer to the Viewing Processing Queues section

4.1.1.2.2 Viewing Reports

Viewing reports process is similar for all the queues. For more information on viewing report, refer to the Viewing Reports section

4.1.1.3 Completed Queues

The completed queues are queues which came to the current state after the cases are completely resolved, closed, the transaction are accepted. Users cannot work on these queues as these are completed and closed. However, the user can view the cases and view associated reports.

At any point of time, a user can able to reassign any record currently in the queue to a different queue or an individual user.

When all the work items in a queue are completed, a message appears to the users advising them that the queue is empty. All associated history and current status can be viewable within the record.

Users can also obtain a work item by directly searching for a record in the application or by clicking a pended record from the home page. All records shall be accessible through the application.

4.1.1.3.1 Viewing Holding Queues

Viewing queue process is similar for all the queues. For more information on viewing queues, refer to the Viewing Processing Queues section

4.1.1.3.2 Viewing Reports

Viewing reports process is similar for all the queues. For more information on viewing report, refer to the Viewing Reports section

4.2 GPS vs. MMR Eligibility Queues

Eligibility queues help you access and work on the MMR Eligibility, DOB, and Gender queues for reviewing the cases added. These queues have the following sections and tabs in the **Eligibility Process Work** form.

- Work Case section
- Case Details tab
- Discrepancy Data tab
- CMS Transaction Details tab
- One Stop Shop tab
- TRR Data tab
- Referenced cases tab
- Comments tab
- Attachments tab
- Action Section
- Workflow Log section

4.2.1 Working on MMR Eligibility Queues

With appropriate access rights, you can access the Eligibility queues from the **Eligibility Queue Summary** page and work on the **Eligibility Process Work** form. You can select from multiple queues to retrieve the next new work item in an Eligibility queue directly from the application.

Based on the Eligibility record age, Eligibility queue records are presented in the application. The age of the record is decided by differentiating the current date from the **Compliance Start Date.**

4.2.1.1 Eligibility Queues and Actions

The below table provides the details of the Eligibility queues, and action values in respective queues. This also provides the list of next queues and next statuses.

Current Queue	Action Taken	Next Queue	Next Status
Eligibility : Processing Queues			

Current Queue	Action Taken	Next Queue	Next Status
This section provides the details of all the Eligibility processing queues, their associated actions values in the **Action** fields, next queues of the current queues and the next statuses.			
New Case	Send CMS Eligibility	Completed	In Progress
	Update Plan	Pended	Resolved- Completed
	Pend Case	Pending Audit	In Progress
	Send to Peer Audit	Completed	In Progress
	Update Plan & Create RPR	Completed	Resolved- Completed
	Close Case	New Eligibility Case	Resolved- Completed
CMS Rejected	Send SCC Update to CMS	Submit to CMS	In Progress
	Send OOA Letter	Pending - NOT	In Progress
	Pend Case	Pended	In Progress
	Send to Peer Audit	OOA - Pending Audit	In Progress
	Close Case	Completed	Resolved- Completed
Pending Audit	Peer Audit Completed	New Eligibility Discrepancy	In Progress
	Add Comments	Elig - Pending Audit	In Progress
	Pend Case	Elig - Pended	In Progress
Peer Audit Failed	Add Comments	Peer Audit Failed	In Progress
	Close Case	Completed	Resolved- Completed
	Pend Case	Pended	In Progress
	Send to Peer Audit	Elig - Pending Audit	In Progress
Pended	NA	Pending - FTT	In Progress
	Pend Case	Pended	In Progress
	Close Case	Completed	Resolved- Completed
	Add Comments	NA	In Progress
Eligibility : Holding Queues This section provides the details of all the Eligibility processing queues, their associated actions values in the **Action** fields, next queues of the current queues and the next statuses.			
Submit to CMS	NA	Update Sent to CMS	In Progress
Update Sent to CMS	NA	CMS Accepted	Resolved- Completed
Update Sent to CMS	NA	CMS Rejected	In Progress
Eligibility : Completed Queues This section provides the details of all the Eligibility processing queues, their associated actions values in the **Action** fields, next queues of the current queues and the next statuses.			
Completed	NA	NA	NA
CMS Accepted	NA	NA	NA

4.2.1.2 Accessing Eligibility Process Work form

Navigation:

To access the **Eligibility Process Work** form:

1. Go to **Application** menu, point to **Eligibility>MMR Eligibility** sub-menu and then click the **Get Queue** link.

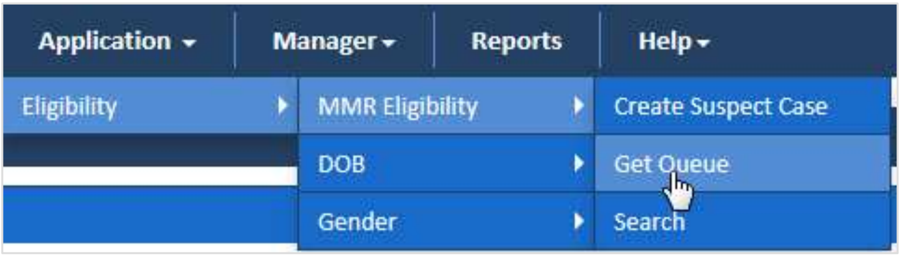


Figure 4-12: Accessing Eligibility Queue Summary Page

The **Eligibility Queue Summary** page appears.

2. Click the get queue icon under the **Actions** column in the **Eligibility Queue Summary** form.

Figure 4-13: The Eligibility Queue Summary page

The **Work Item – Eligibility** page appears.

3. Verify the case details appear by default.
4. Click the **Start Processing** button open the **Eligibility Process Work** form.

Figure 4-14: The Work Item-- Eligibility section

5. Click the **Get Next** to open the next work item.
6. Click **Cancel** to cancel the process of opening the queues.

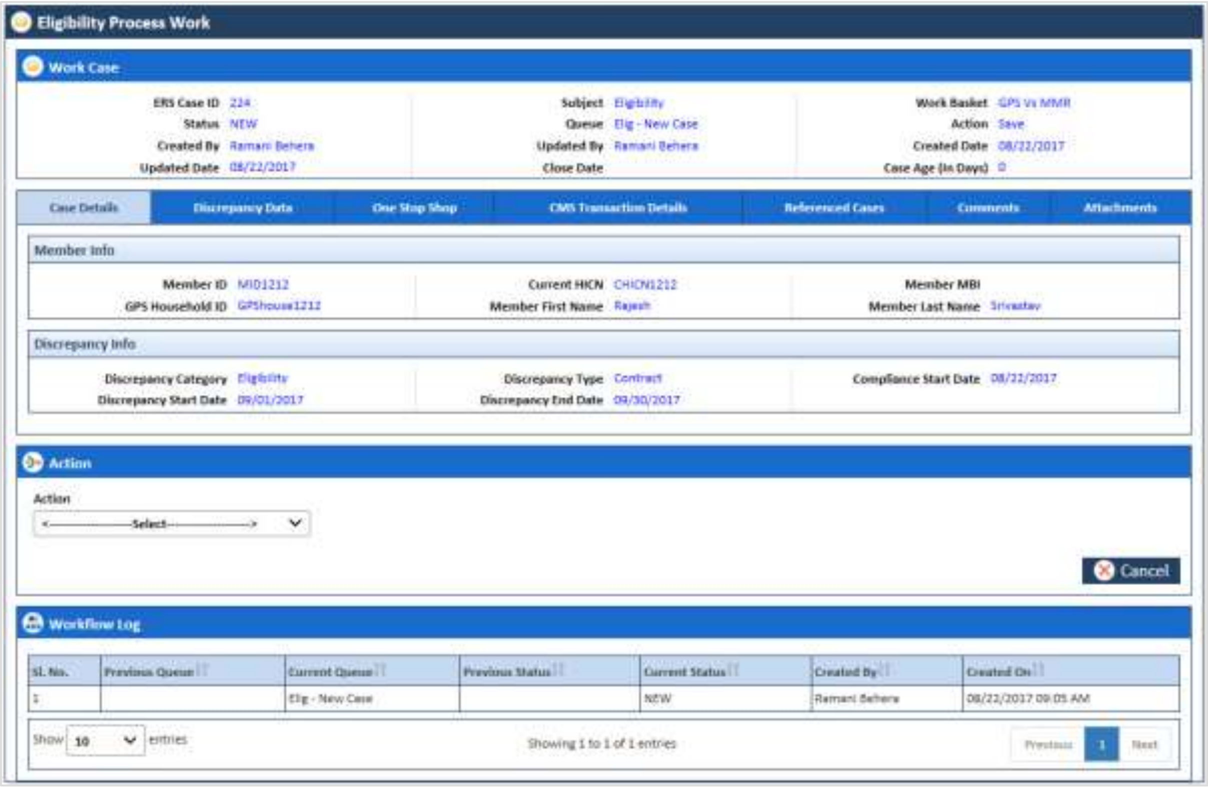


Figure 4-15: The Eligibility Process Work form

For more information how to access the processing queues, refer to the Accessing Processing Queues section.

4.2.1.3 Before working on the Eligibility Process Work form

Before you work on the **Eligibility Process Work** form, you must familiarize yourself with related interfaces and forms that trigger the form.

4.2.1.3.1 Eligibility Queue Summary

This page provides detailed list of various Eligibility queues. For more information on **Eligibility Queue Summary** form, refer to the Types of queues section.

Figure 4-16: The Eligibility Queue Summary Page

Field/Column Name	**Description**	
Start Date field	Enter the start date of the case.	
End Date field	Enter the end date of the cases.	
View button	Click this button to view the queue created between these dates.	
Processing Queue column	**Count** column	**Actions** column
New Case	Displays the count	Displays the action icons a user can use. User can edit queue, view the queue, and view the report.
CMS Rejected		
Pending Audit		

Field/Column Name	Description	
Peer Audit Failed		
Pended		
Holding Queue column	**Count** column	**Actions** column
Submit to CMS	Displays the count	Displays the action icons a user can use. User can edit queue, view the queue, and view the report.
Update Sent to CMS		
Completed Queues	**Count**	**Actions**
Completed	Displays the count	Displays the action icons a user can take. User can edit queue, view the queue, and view the report.
CMS Accepted		

4.2.1.3.2 Accessing cases from queues

You can access the records or cases through the queues by clicking the **Get Queue** icon in the **Actions** column of the **Eligibility Case Summary** page. The **Work Item - Eligibility** form appears after you click the **Get Queue** icon in the **Actions**. Click the **Start Processing** button to access the record if you verify the record details in the **Work Item - Eligibility** page.

For more information on accessing cases from queues, refer to the Accessing Eligibility Process Work form section.

All the field values are auto-populated in this section.

Figure 4-17: Work Item - Eligibility form

Field Name	Description
ERS Case ID	ERS case ID is auto populated.
Current HICN	Current HICN is auto populated.
Discrepancy Start Date	Discrepancy start date is auto populated.
Compliance Start Date	Compliance start date is auto populated.
Member First Name	Member first name is auto populated.
Member Last Name	Member last name is auto populated.
Start Processing button	Click this button to open the case form after verifying the case details
Get Next button	Click this button to access the next cases details.
Cancel button	Click this button to cancel the process.

4.2.1.3.3 Viewing and editing cases from queues

You can view the queues by clicking the **View Queue** icon in the **Actions** column of the **Eligibility Case Summary** page. The **Search** form appears along with **Search Results** and **Advanced Search** if you click the **View Queue** icon in the **Actions** column. This form helps you to search the queues and view the related cases.

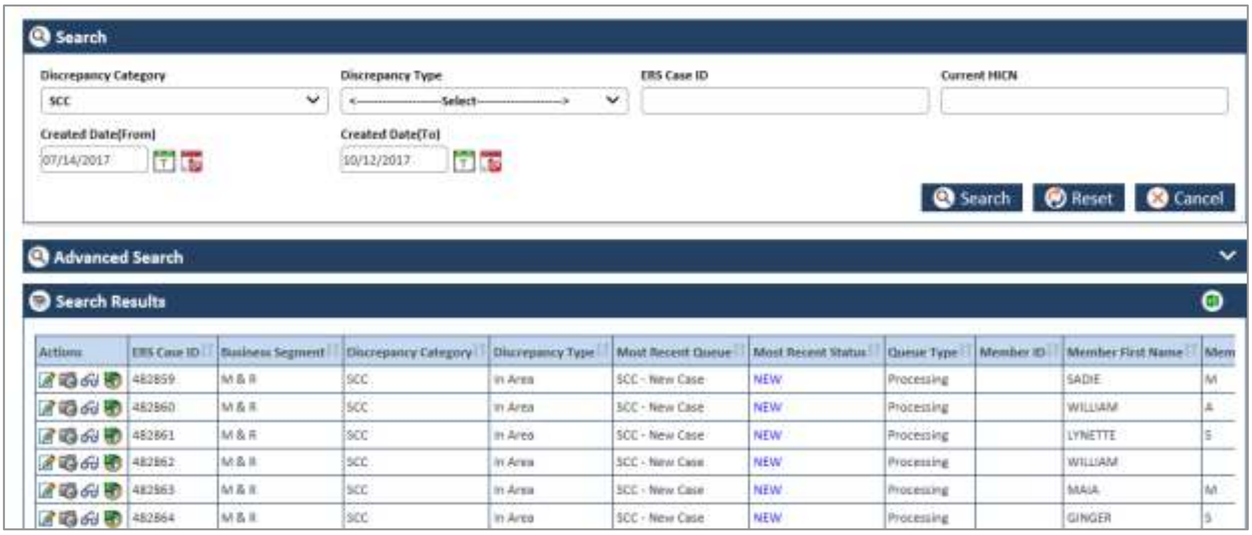


Figure 4-18: The Eligibility Queue Search form

You can click the **Edit Record** icon in the Action column to open the record in editable mode.

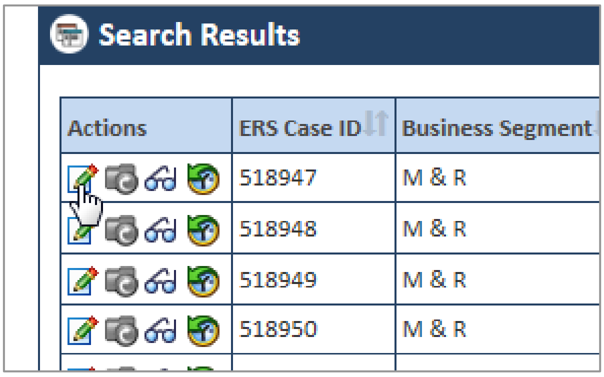


Figure 4-19: Accessing Eligibility Cases

You can also click the **View Record** icon to view the cases in un-editable mode.

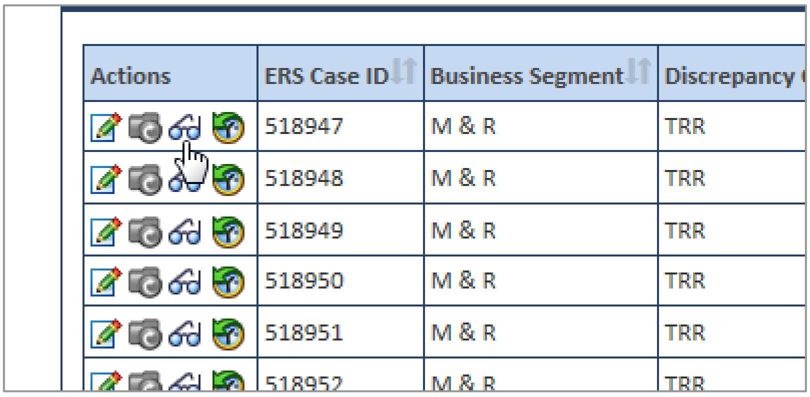


Figure 4-20: Viewing Eligibility Cases

For more information on how to search cases, refer to the Searching Eligibility Cases section.

4.2.1.4 Eligibility Process Work form

The **Eligibility Process Work** form has multiple sections such as Work Case, Action, and Workflow Log. The **Work Case** section of the form contains multiple tabs such as Case Details, Discrepancy Data, CMS Transaction Details, One Stop Shop, TRR Data, Reference Cases, Comments, and Attachment section.

The following section discusses details about the workflow involved in the new cases. All the associated actions, next queues, next statuses are described in the Eligibility Queues and Actions section.

***Note**: All the fields marked with asterisk in the form are mandatory fields.*

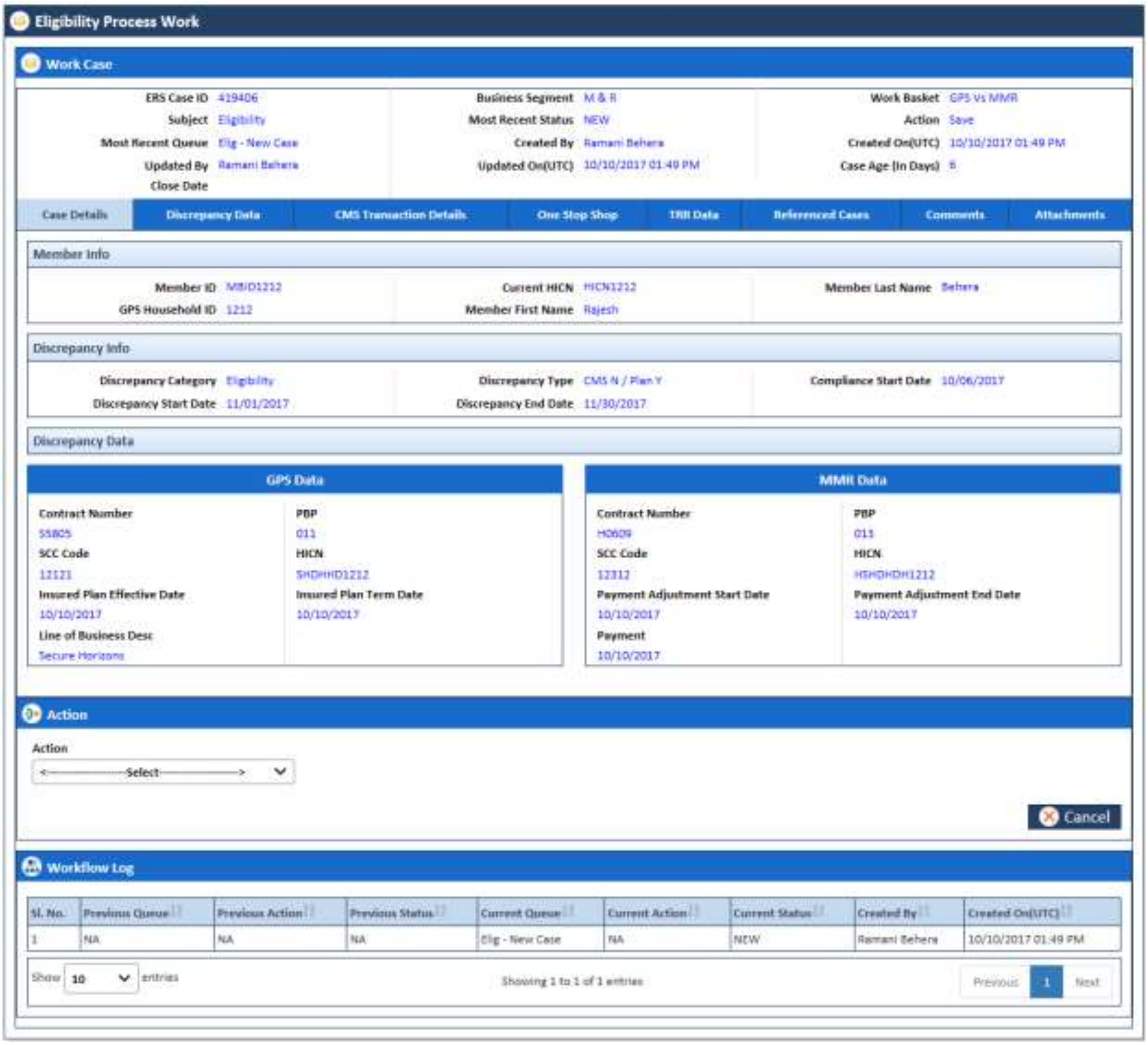


Figure 4-21: The Eligibility Process Work form

4.2.1.5 Work Case Section> Header

All the fields are available in the read-only mode.

Figure 4-22: Work Case Section> Header Section

Field Name	Description
ERS Case ID	Displays the ERS Case ID.
Subject	Displays the subject.
Most Recent Queue	Displays the most recent queue for this case. For new RPR queue the queue name is RPR-Request-Category.
Updated By	Displays the username that updated the case.
Close Date	Doesn't display the case close date until the case is closed.
Business Segment	Displays the business segment name.
Most Recent Status	Displays the current status.
Created By	Displays the user that created the case.

Field Name	Description
Updated On(UTC)	Displays the date when the case was updated last.
Work Basket	Displays the work basket name.
Action	Displays the type action taken the in the previous stage.
Created on (UTC)	Displays the case creation date.
Case Age (In Days)	Displays the case age.

4.2.1.6 Work Case Section> Case Details Tab

The values are populated from the **Create Eligibility Case** form while creating the new Eligibility case.

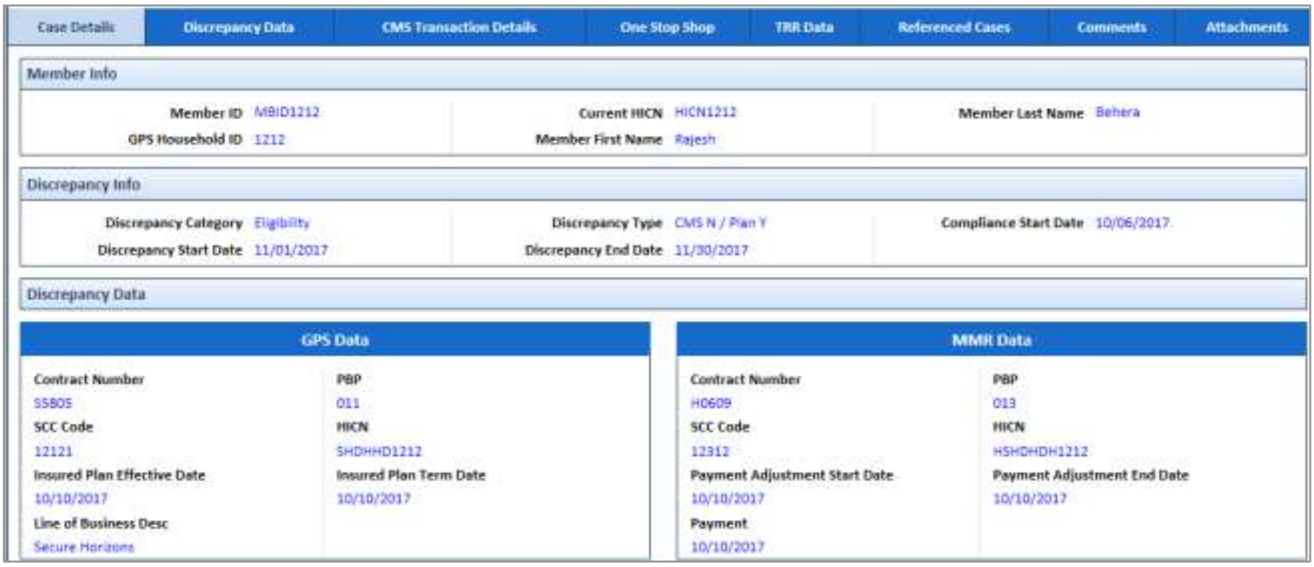


Figure 4-23: Work Case Section> Case Details Tab

Field Name	Description
Case Details tab>**Member info** section All the values are auto-populated **Member Info** section of the **Create Eligibility Case** form.	
Member ID	Displays the member ID.
GPS Household ID	Displays the GPS household ID.
Current HICN	Displays the HICN number.
Member First Name	Displays the first name of the member.
Member Last Name	Displays the last name of the member.
Case Details tab>**Discrepancy info** section All the values are auto-populated **Member Info** section of the **Create Eligibility Case** form.	
Discrepancy Category	Displays the discrepancy category.
Discrepancy Start Date	Displays the discrepancy start date.
Discrepancy Type	Displays the discrepancy type.
Discrepancy End Date	Displays the discrepancy end date.
Compliance Start Date	Displays the compliance start date.
Case Details tab>**Discrepancy Data** section	
GPS Data sub-section	
Contract Number	Displays the contract number.
SCC Code	Displays the state country code.
Insured Plan Effective Date	Displays the date from which the insured plan is effective.
Line of Business Desc	Displays the details of the line of business.
PBP	Displays the PBP value.

Field Name	Description
HICN	Displays the current HICN number.
Insured Plan Term Date	Displays the term date of the insured plan.
MMR Data sub-section	
Contract Number	Displays the contract number of the case.
SCC Code	Displays the SSC code of the case.
Payment Adjustment Start Date	Displays the date from which the payment adjustment starts.
Payment	Displays the payments date.
PBP	Displays the PBP number.
HICN	Displays the current HICN number.
Payment Adjustment End Date	Displays the date from till the payment adjustment ends.

4.2.1.7 Work Case Section> Discrepancy Data Tab

4.2.1.7.1 GPS Data Sub-tab

These data are populated from GPS.

Figure 4-24: The Discrepancy Data Tab> Data Sub-tab

Field Name	Description
Discrepancy Data tab>**GPS Data** section All the values are auto-populated from **GPS**.	
HICN	Displays the current HCIN number.
LOB	Displays the LOB for the case.
PBP	Displays the PBP in this field.
Date of Birth	Displays the date of the birth of the member.
City	Displays the name of the city the member belongs to.
Plan Effective Date	Displays the date from which the plan is effective.
SCC Effective Date	Displays the date from which the SC date is effective.
Application Approved Status	Displays the value for application approval status.
Member ID	Displays the member ID.
Line of Business Desc	Displays the Line of Business details.
First Name	Displays the first name of the member.
Address Line 1	Displays the address in the line one.
Zip Code 5	Displays the value for zip code 5.
State	Displays the state to which the member belongs to.
Plan Term Date	Displays the plan term date.
SCC End	Displays the SSC end date.
GPS OOA Disenrollment Date	Displays the date when the GPS OOA disenrollment happened.

Field Name	Description
GPS Household ID	Displays the GPS household names.
Contract Number	Displays the contract number.
Last Name	Displays the last name of the member.
Address Line 2	Displays the displays the address in the line two.
Zip Code 4	Displays the value for zip code 2.
SCC Code	Displays the displays the SSC code.
Application Information	Displays the displays the application information.
PDP Auto Enrollee Indicator	Displays the value for the indicator for PDP auto enrollee.
Individual Id	Displays the value for individual ID.

4.2.1.8 Work Case Section> CMS Transaction Details Tab

The values in this section appears from matching fields, if you select the value **Send to Peer Audit** in the **Action** section of the **Eligibility Process Work** form and save the form.

Note: *If a user selects the value* ***Send to Peer Audit*** *in the* ***Action*** *section of the* ***Eligibility Process Work*** *form and save the form, the queue routed to the* ***Processing*** *queue as* ***Elig - Pending Audit*** *queue.*

Figure 4-25: Work Case Section> CMS Transaction Details Tab

Field Name	Description
CMS Transaction Details	
HICN	Displays the current HICN number.
Contract ID	Displays the contract ID.
Root Cause	Displays the root cause of discrepancy.
Effective Date	Displays the date from which the case id effective.
EGHP Indicator	Displays the value for EGHP.
Last Name	Displays the last name of the member.
PBP	Displays the PBP of the case.
Transaction Type Code	Displays the transaction type code.
Other Resolution	Displays the values for other resolutions.
Date of Birth	Displays the date of birth of the member.
Application Date	Displays the application date.
Election Type	Displays the value for election type.
Resolution	Displays the resolution.

If you visit the **Processing Queues** and view the record (from **Eligibility Process Work** form) corresponding to the ERS Case ID, you can view the details updated in the **CMS Transaction Details** tab. You can also see that the comments section is updated with the latest comment you provided.

For more information, refer to the Accessing Holding Queues section.

4.2.1.9 Work Case Section> One Stop Shop Tab

This section displays a report.

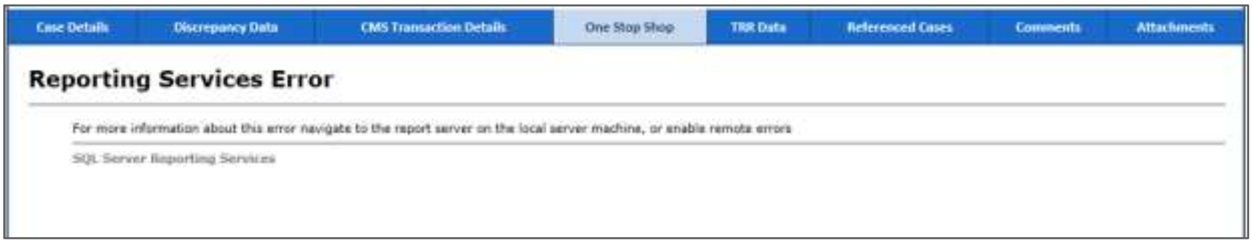


Figure 4-26: Work Case Section> One Stop Shop Tab

4.2.1.10 Work Case Section >TRR Data Tab

This tab of the form displays TRR data related to this case. This section displays Summary Information, Bad Transaction History, Bad Transaction Pending and Responses.

Figure 4-27: The TRR Data> Summary Information

Figure 4-28: The TRR Data> Bad Transaction History

Figure 4-29: The TRR Data> Bad Transaction pending

Figure 4-30: The TRR Data> Response

4.2.1.11 Work Case Section> Reference Cases Tab

This tab of the form displays all the cases related to this case.

Figure 4-31: Work Case Section> Reference Cases Tab

Column Name	Description
CMS Transaction Details	
Actions	Displays the actions for the records.
ERS Case ID	Displays the ERS case ID.
Discrepancy Type	Displays the discrepancy type for the queue.
Discrepancy Start Date	Displays the start date of the discrepancy.
Discrepancy Source	Displays the discrepancy source
Transaction Reply Code	
First Letter Mail Date	
Second Letter Mail Date	
Discrepancy Status	
Resolution Code	
Category	
HICN	
Contract	
GPS Contract	
MMR Contract	
PBP	
GPS PBP	
MMR PBP	
Work Status	
Assigned To	
Actions	

4.2.1.12 Work Case Section> Comments tab

If you visit the Holding Queues and view the record (**Eligibility Process Work**) corresponding to the ERS Case ID, you can view the comments you entered updated in the Comments tab. You can also see that the, comment s section is updated with the latest comment you provided.

For more information, refer to the Accessing Holding Queues section.

Figure 4-32: Work Case Section> Comments Tab

Column Name	Description
Sl. No.	The serial no of the comments list is displayed.
Comment	The comments appear in this column is displayed.
Source System	The system ID is displayed.
Created By	The name of the user created the case is displayed.
Created On	The date when the case was created is displayed.

4.2.1.13 Work Case Section> Attachments tab

You can attach documents in this field using the Add Attachment button. For more information, on how to attach documents, refer to Attaching and deleting documents section.

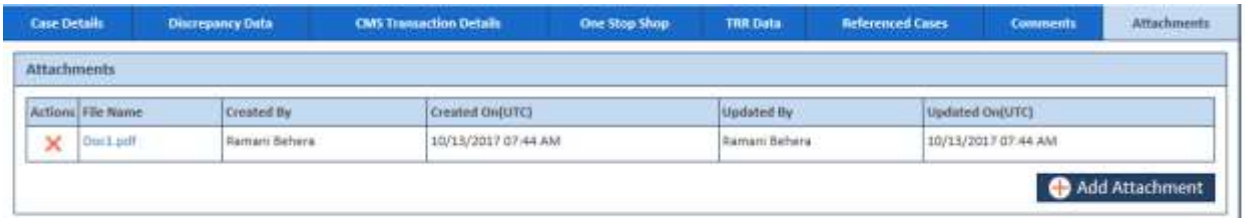


Figure 4-33: Work Case Section> Attachments tab

Column Name	Description
Actions	This column allows you to delete the attachment. For more information on deleting attached field from the Attachments tab, refer to the Attaching and deleting documents section.
File Name	Displays the name of the attached file.
Created By	Displays the name of the user that created the case.
Created On(UTC)	Displays the date when the case was created.
Updated By	Displays the name of the user that attached the case.
Updated On(UTC)	Displays the date when the file was attached.
Add Attachment button	Click this to attach the file. For more information how to attach files, refer to the Attaching and deleting documents section.

4.2.1.14 Eligibility Process Work> Action Section

Based on the work basket that you select while login or module you access, the action values changes in the respective queues forms. For more information on various action values in ERS queues, refer to Various Queues and related actions section.

For more information on various action values in the Eligibility queue, refer to Eligibility Queues and Actions section.

4.2.1.14.1 Action Values

Action Values	Description

Action Values	Description
Add Comments	Select this action value to add your comments about the case while working on the queue. The status of the queue becomes In Progress and the queue is routed to the Processing Queue as New Eligibility Queue after you add the comments and click the Save button after selecting value Add comments.
Close Case	Select this action value to close the case. If you select this option, two fields Resolution and Reason appear. The queue is routed to the Completed Queues list as Completed queue with the status Resolved – Completed if you click the Save button after the selecting the value Close Case.
Pend Case	Select this value to make the case pending for more research on the case. The queue is routed to the Processing Queues list as Pended queue with the status In Progress if you click the Save button after selecting the value Pend Case.
Send to Peer Audit	Select this value to send the Eligibility for peer audit. . The queue is routed to the Processing Queues list as Pending Audit queue with the status In Progress if you click the Save button after selecting the Send to Peer Audit.
Update CMS Eligibility	Select value to send the Eligibility update to CMS. The queue is routed to the Holding Queues list as Submit to CMS queue with the status In Progress if you click the Save button. *If the user saves the form after selecting **Update CMS Eligibility**, a message, '**You are about to initiate a CMS transaction, please confirm**.' appears. If the user click **Cancel** in the message window, then it remains open to modify and edit the data.* *After the update is sent to CMS, CMS can either reject or accept the update. If CMS accepts the update, the status of the case changes **Resolved-Completed** and queue changes to **CMS ACCEPTED**. The record then gets removed from the queue. If CMS rejected update, the queue changes to **CMS REJECTED**.*
Update Plan	Select this value to update the plan. After you select this value, you must provide the resolution and root causes. The values in Resolution and Root Causes after you select this action are same if you select the value Update Plan & Create RPR field. The queue is routed to the Completed Queues list as Completed queue with the status Resolve - Completed if you click the Save button after selecting the value Update Plan.
Update Plan & Create RPR	Select this value for updating plan and creating RPR. After you select this value, you must provide the resolution and root causes. The values in Resolution and Root Causes after you select this action are same if you select the value Update Plan field.

***Note**: When the Eligibility case is sent for peer audit by selecting the action value **Send to Peer Audit**, the case routes to the **Eligibility Pending Audit** queues with the status **In Progress**.*

If the peer auditor selects the value **Peer Audit Completed** in the **Action** field and selects the value **Yes** in the **Contains Error** field, the peer audit process is failed. And the cases routes to the **Peer Audit Failed** queue.

If the peer auditor selects the value **Peer Audit Completed** in the **Action** field and selects the value **No** in the **Contains Error** field, the cases routes to the new case queue.

Associated fields in the Action section

The following table shows the fields those appear based on selection of certain value in the **Action** field of the queue form. This table also displays some fields which appears based on selection certain values in the fields which appears after selection of the certain values in the Action field.

Associated Fields	Appears when…	Description
Comments	You select the value Add Comments, Close Case, Pend Case, Update CMS Eligibility, Update Plan, Send to Peer Audit, and Update Plan & Create RPR the Action field.	Enter your comments about the action you selected while working on the queue. You can enter comments based on the values you select in the Action field, The comments you enter will appears in the next work flow.
Resolution	You select the value Close Case, Update CMS Eligibility, Update Plan, and Update Plan & Create RPR in the Action field.	Select the appropriate resolution from the list. Based on the action value, the value in this varies.
Root Cause	You select the value Close Case, Update CMS Eligibility, Update Plan, and Update Plan & Create RPR in the Action field.	Select the appropriate root cause in this field. Based on the action value, the value in this varies.
Pend Reason	You select the value Pend Case in the Action field.	Select the appropriate reason for making the case a pend case.
HICN	You select the value Update CMS Eligibility in the Action field.	The HICN is auto-populated in this field.
Last Name	You select the value Update CMS Eligibility in the Action field.	The last name of the member is auto-populated.
Date of Birth	You select the value Update CMS Eligibility in the Action field.	The date of the birth of the member is auto-populated.
Contract Number	You select the value Update CMS Eligibility in the Action field.	The contract number is auto-populated.
PBP	You select the value Send SCC Update to CMS in the Action field.	The PBP is auto-populated.
Application Date	You select the value Update CMS Eligibility in the Action field.	Enter the application date of the case.
Root Cause	You select the value Update CMS Eligibility in the Action field.	Select appropriate root cause.
Transaction Type Code	You select the value Update CMS Eligibility in the Action field.	Select the appropriate transaction type code. The following values are available in this field: • Cancel Enrolment Transaction - 80 • Cancellation Disenrollment Transaction - 81 • Retro - Disenrollment- 51 • Single Enrolment Transaction - 61 *If users select the value Retro - Disenrollment- 51 in Transaction Type Code field, they cannot select the value D- Medicare Advantage Disenrollment Period (MADP) and Initial Election Period (IEP) in the Election Type field.*
Election Type	You select the value Update CMS Eligibility in the Action field.	Select the appropriate value in this field. *If users select the value* ***Retro -***

Associated Fields	Appears when…	Description
		Disenrollment- 61 *in* ***Transaction Type Code*** *field and the value* ***A- Annual Election Period (AEP)*** *in the* ***Election Type*** *field, the date is set to the first day of the years of case creation in the* ***Effective Date*** *field.*
Effective Date	You select the value Update CMS Eligibility in the Action field.	Enter the effective date of the case.
Resolution	You select the value Update CMS Eligibility in the Action field.	Select the appropriate resolutions.
EGHP indicator	You select the value Update CMS Eligibility in the Action field.	NA

Associated form in the Action section

Using the Eligibility Process Work form, you can initiate RPR cases. While selecting the action values, if you select the value Update Plan & Create RPR, then RPR Info section appears in the Action section.

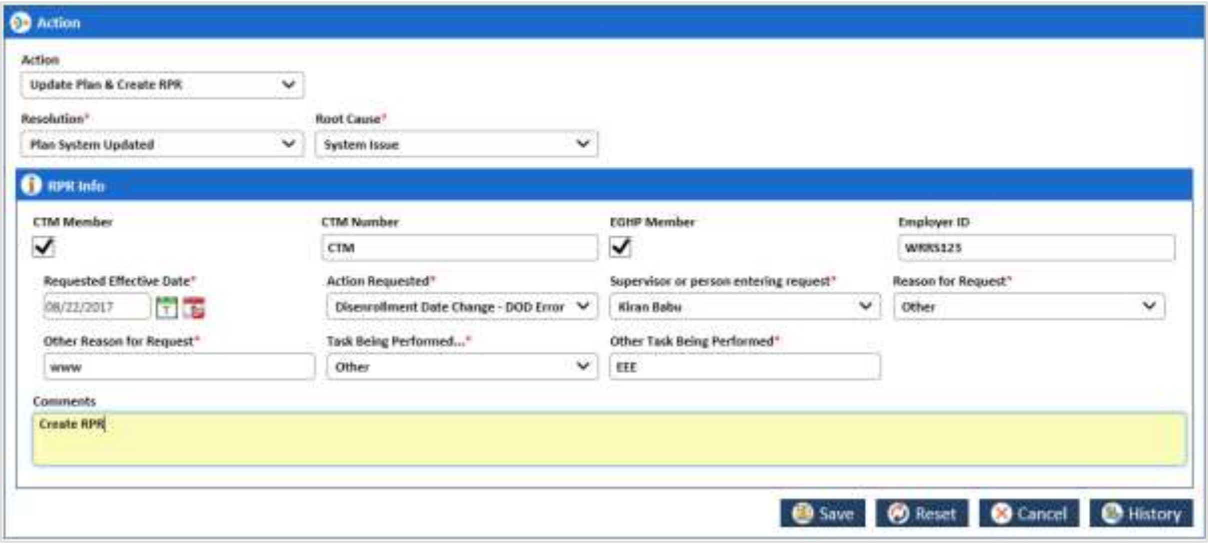


Figure 4-34: The RPR Info section in Action section

Action button	Description
CTM Member	Select this checkbox if you want to enter the Center for Transactional Medicine. If you select this field, then the CTM Number field becomes compulsory.
CTM Number	Enter the CTM number.
EGHP Member	Select the check box if you want enter the EGHP number details.
Employer ID	Enter the employee ID number.
Requested Effective Date	Enter the date since when you have initiated the RPR updated the plan.
Action Requested	Select the appropriate value in this field. These are the types of the actions you can request.
Supervisor or person entering request	Select the name of the supervisor that requested to update the plan and initiate the RPR.
Reason for Request	Select the appropriate reason for the request from the list. If you select the value Others, an associated field, Other Reason for Request appears.
Other Reason for Request	Enter the reason in this field.
Task Being Performed...	Select the appropriate task is being performed from the list. If you select the value Others, an associated field, Other Task Being Performed

Action button	Description
	appears.
Other Task Being Performed	Enter the task being performed in this field.

Action buttons

Action button	Description
Save	Click this button to send the form to next workflow level.
Reset	Click this button to remove any of the selection from the form.
Cancel	Click this button to cancel the process of the processing the case. If you click this button, an error message, Are you sure want to leave this page? appears. You can click the Yes to cancel the process, or else click No.
History	Click this button to view the detailed history of the case.

4.2.1.15 Eligibility Process Work >Workflow Log Section

The workflow log provides the details about various cases such as their current and previous statuses and queues, date on when it was created and the associated roles.

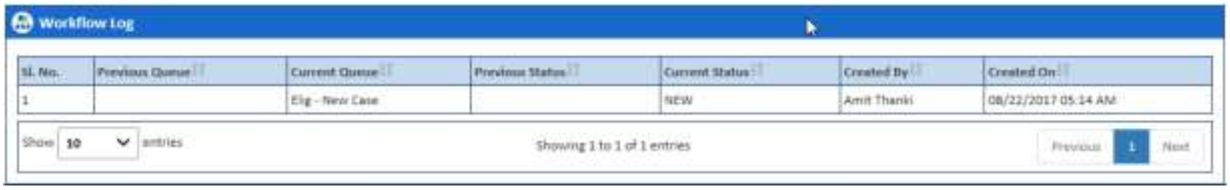


Figure 4-35: Workflow Log Section

Columns Name	Description
Sl. No.	Displays the serial numbers of the cases in the table.
Previous Queue	Displays the name of the previous queue of the case.
Current Queue	Displays the name of the current queue of the case.
Previous Status	Displays the name of the previous status of the case.
Current Status	Displays the name of the previous current of the case.
Created By	Displays the name of the role that created case.
Created On	Displays the date when the case was created.

4.2.2 Searching Eligibility Cases

You can search various records with **In-Progress** and **Resolve-Completed** statuses. This helps you working on the records or reassigning the cases to different users. You can access the list of the records by providing the search criteria in the record search form. After accessing a list of records, you can edit and view the records and view the associated reports. You can edit the records those are incomplete and not assigned to any other users.

Users can view all records within the record search page regardless of their permissions. However, users cannot edit records unless they have permissions to access the selected records.

If a user views or edits a record accessing from the search results, upon exiting the record, the application redirects the user to the search page with search results from the last search.

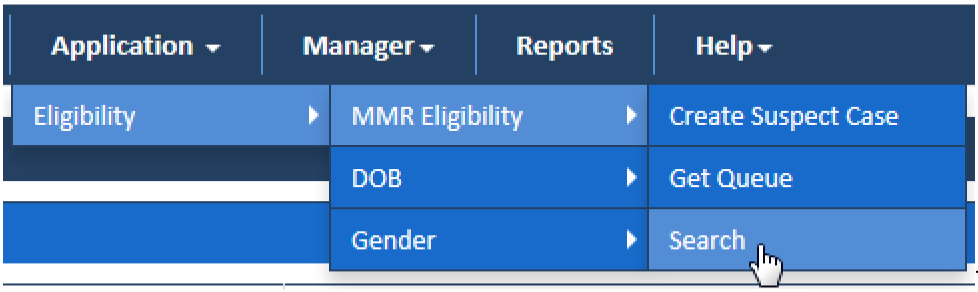
4.2.2.1 Searching Records

You can enter or select the entire search criteria for the records that you want to search. Based on your search criteria, the respective records appear in the Search Result section. For searching Eligibility records, you need access the Search form.

Navigation:

To access the **Search** form:

1. Go to **Application** menu, point to **MMR Eligibility** and click the **Search** link. The **<Queue Name> Queue Summary** page appears.



The Search page appears along with **Advanced Search** section and **Search Results** table.

Figure 4-36: The Eligibility Search form

For taking appropriate action in the form, refer to the below table.

Field Name	Description
Discrepancy Category	Select the discrepancy category in this field. The following categories are available in this field. • Eligibility • DOB • Gender
Discrepancy Type	Select the discrepancy type in this field. The following values are available in this field. • DOB • CMS N/ Plan Y • MS Y/ Plan N • Contract • PBP • Gender
ERS Case ID	Enter the ERS case ID in this field.
Current HICN	Enter the current HICN in this field.
Created Date (From)	Select the case creation date from which you want to search the cases.
Created Date(To)	Select the case creation date till which you want to search the cases.
Search button	Click Search button to search the records.
Reset button	Click this button to remove all the selected search criteria.
Cancel button	Click this button to cancel the process of searching records. After you can cancel the search process, the home page appears.

4.2.2.1.1 OOA Search Result

The search result details appear after you do a search by entering the required search criteria.

Search Results

Actions	ERS Case ID	Business Segment	Discrepancy Category	Discrepancy Type	Most Recent Queue	Most Recent Status	Queue Type	Member ID	Member First Name	Mer
	41764	M & R	Eligibility	CMS N / Plan Y	Elig - New Case	NEW	Processing	8664160	RAQUEL	
	41765	M & R	Eligibility	CMS N / Plan Y	Elig - Pended	IN PROGRESS	Processing	924896088	JOSE	R
	41767	M & R	Eligibility	CMS N / Plan Y	Elig - Pended	IN PROGRESS	Processing	942363869	MELBA	C
	41768	M & R	Eligibility	CMS N / Plan Y	Elig - New Case	NEW	Processing	933229256	CARMEN	J
	41771	M & R	Eligibility	CMS N / Plan Y	Elig - Pended	IN PROGRESS	Processing	930255954	JOHN	J
	41772	M & R	Eligibility	CMS N / Plan Y	Elig - Pended	IN PROGRESS	Processing	11804830	MARCELINA	S
	41773	M & R	Eligibility	CMS N / Plan Y	Elig - Pending Audit	IN PROGRESS	Processing	3817869	DALE	E
	41775	M & R	Eligibility	CMS N / Plan Y	Elig - Completed	RESOLVED COMPLETED	Completed	927068948	ELLEN	J
	41776	M & R	Eligibility	CMS N / Plan Y	Elig - Pended	IN PROGRESS	Processing	917454656	BONNIE	W
	41777	M & R	Eligibility	CMS N / Plan Y	Elig - New Case	NEW	Processing	912448716	HARRIET	M

Show 10 entries Showing 1 to 10 of 500 entries Previous 1 2 3 4 5 ... 50 Next

Figure 4-37: Search Results table

Exporting search result data:

You can export all the search result data in to an Excel sheet. Click button to save the search result details into a MS Excel spreadsheet.

Once you click this button, the search result gets downloaded in Excel spreadsheet which you can directly open or save in the local drive.

The following are the list columns that are displayed in the search result tables.

- ERS Case ID
- Discrepancy Category
- Discrepancy Type
- Most Recent Queue
- Most Recent Status
- Member ID
- Member First Name
- Member Middle Name
- Member Last Name
- Member Gender
- Member DOB
- Member Current HICN
- Member Contract Number
- Member PBP
- Member LOB
- GPS HICN
- MMR HICN
- Aging
- Member SCC Code
- GPS Household ID
- Discrepancy Start Date
- Reason
- Resolution
- Discrepancy Source
- Submission Type

- CTM Member
- EGHP Member
- Requested Effective Date
- Action Requested
- Potential Submission Date
- RPC Submission Date
- FDR Received Date
- FDR Code Received
- FDR Status
- RPR Requestor
- Created On (UTC)
- Created By
- Last Updated On (UTC)
- Last Updated By
- Locked On (UTC)
- Locked By

4.2.2.2 Conducting Advanced Record Searches

You can do an advanced search for the record by providing various search criteria. You can access the various sections or tabs of the Advanced Search form by clicking the form name, Advanced Search. This helps you view all the tabs under the Advanced Search for. If you click the tabs, you can view associated fields or search criteria.

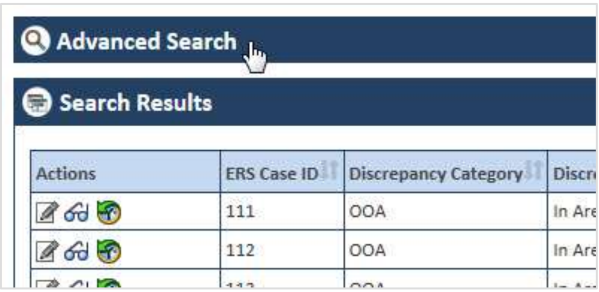


Figure 4-38: Advanced Search Form

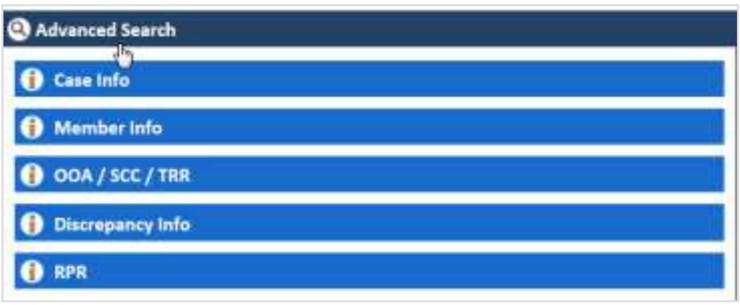


Figure 4-39: The Advanced Search Form tabs

Expand the tab:

You can expand the tab to view all the fields by click on the tab name. This helps you access all the associated fields in the tab and entered the search criterial to search the records.

Contract the tab:

You can contract the expanded tab by clicking on tab name. This will help you hide or shrink fields in the tab.

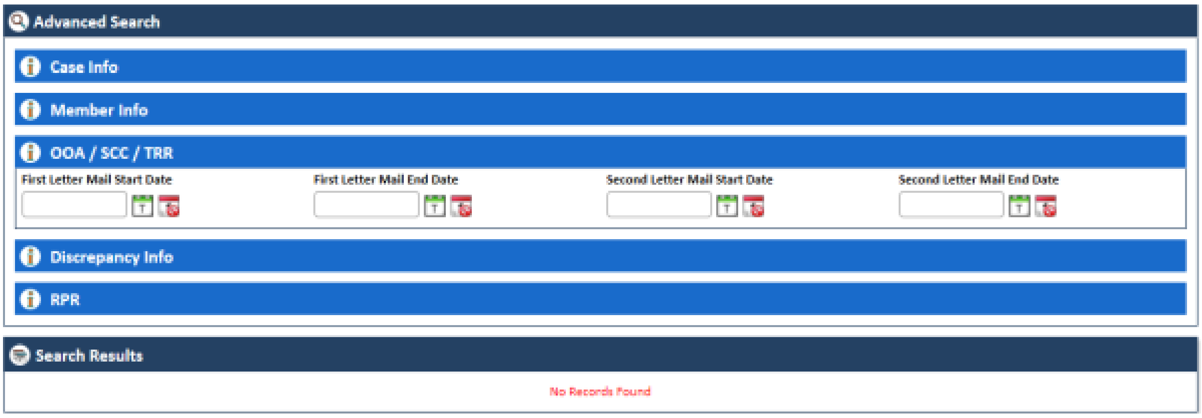


Figure 4-40: Expanded Tab

4.2.2.2.1 The Advanced Search for > Expanded Tabs

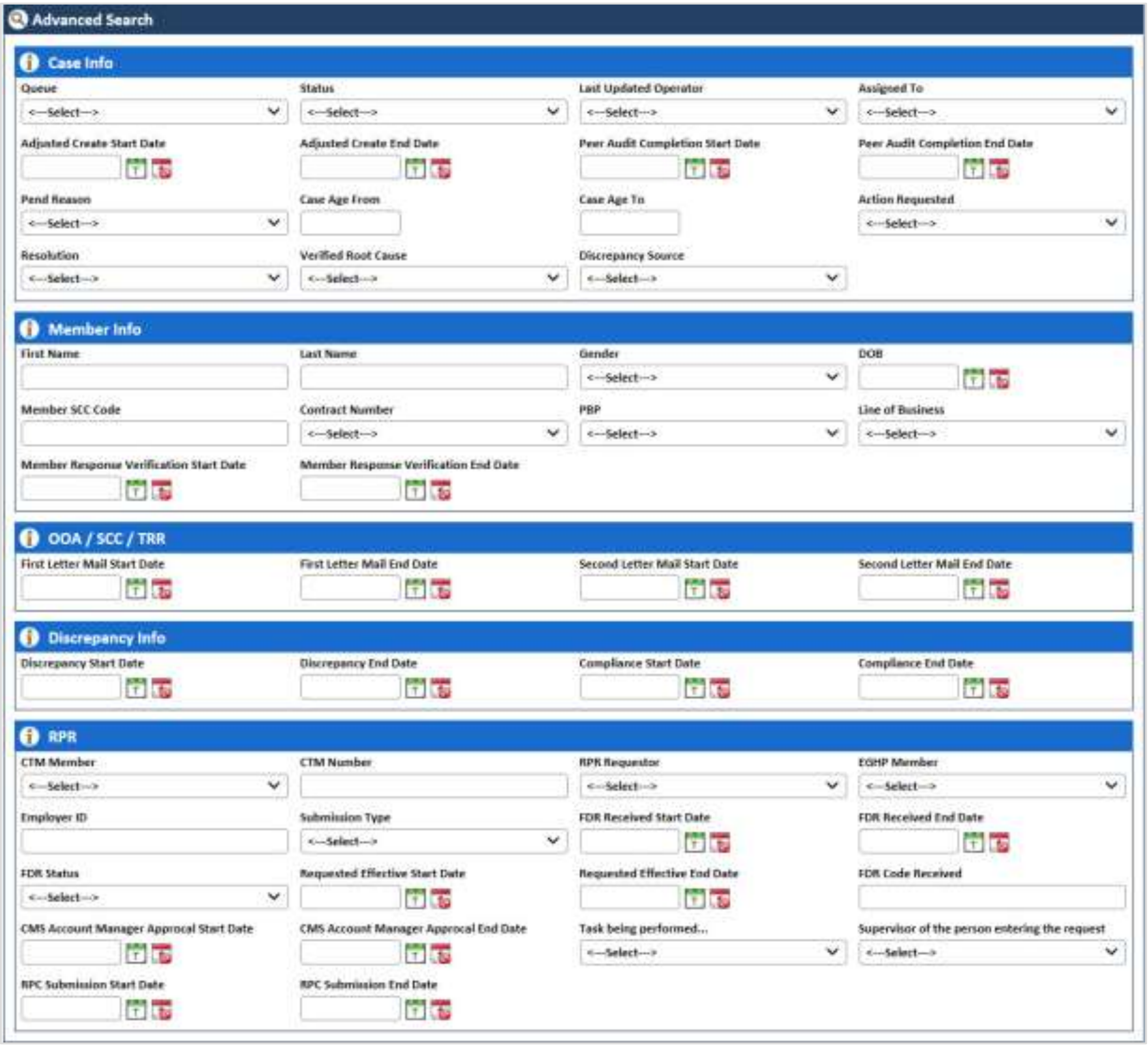


Figure 4-41: Advanced Search Form> Expanded Tabs

Field Name	Description
Case Info Enter the detailed information about the case in this tab.	
Queue	Select the queue which associated the record that you want to search. The record that you want to search belongs to this queue. All the queues of the OST modules are available in this field which includes OOA, SCC and TRR. The queues related OOA starts with OOA.

Field Name	Description
	For example the, new queue for OOA is OOA – New Case. Similarly, the queues for SCC and TRR cases start with SCC and TRR, respectively.
Status	Select the status of the record that you want to search. This field displays the following statuses: • **IN PROGRESS**: When a new case is responded and not completed, it becomes an **In Progress** queue. • **NEW:** When a new case is created and nit responded, it becomes a **New** queue. • **RESOLVED COMPLETED**: When and cases completed from all respective such as from users, and CMS, it becomes a **Resolved Completed** queue.
Last Updated Operator	Select the name of the operator that updated last updated the case that you want to search.
Assigned To	Select the name of the user to whom the cases was assigned to.
Adjusted Create Start Date	Select the adjusted start date of the created case that you want to search.
Adjusted Create End Date	Select adjusted end date of the created case that you want to search.
Peer Audit Completion Start Date	Select the start date when the peer audit was completed on the case that you want to search.
Peer Audit Completion End Date	Select the end date when the peer audit was completed on the case that you want to search.
Pend Reason	Select the appropriate pend reason of the case that you want to search.
Case Age From	Select the staring period of the case age of the case that you want to search.
Case Age To	Select the ending period of the case age of the case that you want to search.
Action Requested	Select the last action taken or requested on the case that you want to search.
Resolution	Select the resolution that was taken to close the cases that you want to search.
Verified Root Cause	Select the verified root cause of the cases that you want to search.
Discrepancy Source	Select the appropriate discrepancy sources of the case that you want to search.
Member Info Enter the member information in case that you want to search.	
First Name	Enter the first name of the member in case that you want to search.
Last Name	Enter the last name of the member in case that you want to search.
Gender	Select the gender of the member in case that you want to search.
DOB	Enter the date of birth of the member in the case that you want to search.
Member SCC Code	Enter the SCC code of the member in the case that you want to search.
Contract Number	Select the contract number mentioned in the case that you want to search.
PBP	Select the PBP mentioned in the case that you want to search.
Line of Business	Select the line of the business mentioned in the case that you want to search.
Member Response Verification Start Date	Enter the start date of the member verification mentioned in the case that you want to search.
Member Response Verification End Date	Enter the end date of the member verification mentioned in the case that you want to search.
OOA/SCC/TRR Enter discrepancy and compliance related dates in this tab.	

Field Name	Description
First Letter Mail Start Date	Enter the start date since when the first mail was sent to the member.
First Letter Mail End Date	Enter the end date since when the first mail was sent to the member.
Second Letter Mail Start Date	Enter the start date since when the second mail was sent to the member.
Second Letter Mail End Date	Enter the end date since when the second mail was sent to the member.
Discrepancy Info Enter the discrepancy details in this tab.	
Discrepancy Start Date	Enter the discrepancy start date of the case that you want to search. This helps you display all the record with entered discrepancy start date.
Discrepancy End Date	Enter the discrepancy end date of the case that you want to search. This helps you display all the records with entered discrepancy end date.
Compliance Start Date	Enter the compliance start date of the case that you want to search. This helps you display all the record with entered discrepancy start date.
Compliance End Date	Enter the compliance end date of the case that you want to search. This helps you display all the records with entered discrepancy end date.
RPR Enter RPR details in this tab.	
CTM Member	Select the CTM value Yes in this field if you want to consider the CTM as the search criteria of the record that you want to search.
CTM Number	Enter the CTM number in this field.
RPR Requestor	Select the value Yes if you want to consider RPR requester as the search criteria of the case that you want to search.
EGHP Member	Select the value Yes if you want to consider the EGHP
Employer ID	Enter the employee ID in this field.
Submission Type	Select the submission type of the case that to you want to search.
FDR Received Start Date	Select the start date of the received FDR of the case that you want to search. This helps you display all the records with this start date and the entered end date.
FDR Received End Date	Select the end date of the received FDR of the case that you want to search. This helps you display all the records with this start date and the entered end date.
FDR Status	Select the status of the FDR mentioned in the cases that you want to search.
Requested Effective Start Date	Enter the requested effective start date. One or multiple Effective Dates can be entered and used as search criteria. A date range is not applicable for this search option. A user can enter a single effective date or multiple effective dates.
Requested Effective End Date	Enter the requested effective end date. One or multiple Effective Dates can be entered and used as search criteria. A date range is not applicable for this search option. A user can enter a single effective date or multiple effective dates.
FDR Code Received	Enter the received FDR Code.
CMS Account Manager Approval Start Date	Enter the start date of the CMS account manager approval mentioned in the case that you want to search.
CMS Account Manager Approval End Date	Enter the end date of the CMS account manager approval mentioned in the case that you want to search.
Task being performed...	Select the appropriate task being performed in this field.
Supervisor of the person entering the request	Select the name of the supervisor of the user created the case. Allow user to type the name but the system retrieves the selected user

Field Name	Description
	from the application.
RPC Submission Start Date	Enter the start date of the RPC submission.
RPC Submission End Date	Enter the end date of the RPC submission.

4.2.3 Working on DOB/Gender Queues

With appropriate access rights, you can access the DOB/Gender queues from the DOB/Gender Queue Summary page and work on the DOB Process Work form. You can select from multiple queues to retrieve the next new work item in a DOB/Gender queue directly from the application.

Based on the DOB/Gender record age, DOB/Gender queue records are presented in the application. The age of the record is decided by differentiating the current date from the Compliance Start Date.

Note: *The workflow and process involved in the cases in the Eligibility DOB and Gender queues are very similar to the cases in MMR Eligibility queues except the different types of queues and actions values. However, the processes, the queues and the work flows are exactly same in the cases of Gender and DOB queues except the subject in the forms. In all the three case forms such as Eligibility, DOB, and Gender Process Work forms, the header section, case details section display similar fields. Howe3ver, in the DOB and Gender Process forms, except the subject and process form names, the two forms display same header section, tabs, and Action section.*

Note*: All the fields marked with asterisk in the form are mandatory fields.*

4.2.3.1 DOB/Gender Queues and Actions

The below table provides the details of the DOB/Gender Queues, action values in respective queues. This also provides the list of next queues and next statuses.

Current Queue	Queue Type	Action Taken	Next Queue	Next Status
DOB/Gender Queues This table provides details of all the DOB queues, their associated actions values in the Action fields, next queues of the current queues and the next statuses.				
New Case	Processing Queue	Pend Case	Pended	In Progress
		Send to Peer Audit	DOB/Gender - Pending Audit	In Progress
		Close Case	Completed	Resolved- Completed
		Add Comments	New DOB/Gender Discrepancy	New / In Progress
		Update GPS	Completed	Resolved- Completed
Pending Audit	Processing Queue	Peer Audit Completed	New Case	In Progress
		Pend Case	Pended	In Progress
		Close Case	Completed	Resolved- Completed
		Add Comments	Pending Audit	In Progress
		Update GPS	Completed	Resolved- Completed
Pending Audit Failed	Processing Queue	Add Comments	Peer Audit Failed	In Progress
		Close Case	Completed	Resolved- Completed
		Pend Case	Pended	In Progress
		Send to Peer Audit	DOB/Gender - Pending Audit	In Progress
Pended	Processing Queue	NA	NA	NA
		NA	NA	NA
		NA	NA	NA

Current Queue	Queue Type	Action Taken	Next Queue	Next Status
		NA	NA	NA
Completed	Completed Queue	NA	NA	NA

Navigation:

To access the DOB/Gender Process Work form:

1. Go to Application menu, point to Eligibility>DOB/ Gender and click the Get Queue link.

Figure 4-42: Accessing DOB Queue Summary Page

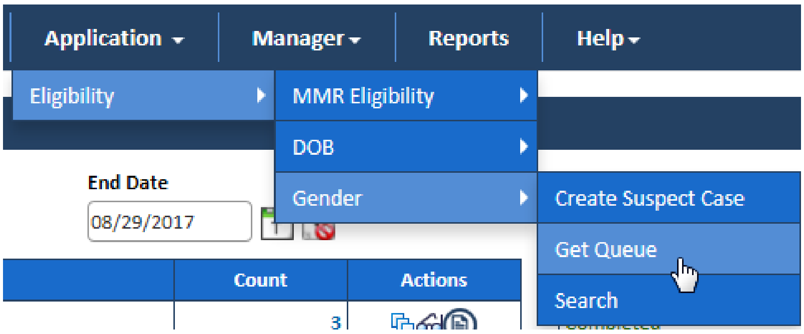


Figure 4-43: Accessing Gender Queue Summary Page

The DOB/Gender Queue Summary page appears.

2. Click the queue icon under the Action column in the DOB/Gender Queue Summary form.

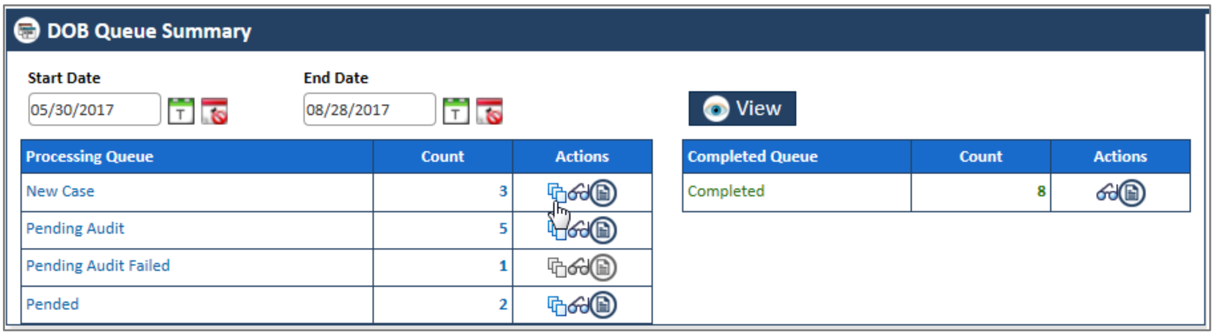


Figure 4-44: The DOB Queue Summary page

Figure 4-45: The Gender Queue Summary page

The Work Item – DOB page appears.

3. Click the Start Processing button open the DOB/Gender Process Work form.

Figure 4-46: The Work Item-- DOB section

Figure 4-47: The Work Item-- Gender section

4. Click the Get Next to open the next work item.

5. Click Cancel to cancel the process of opening the queues.

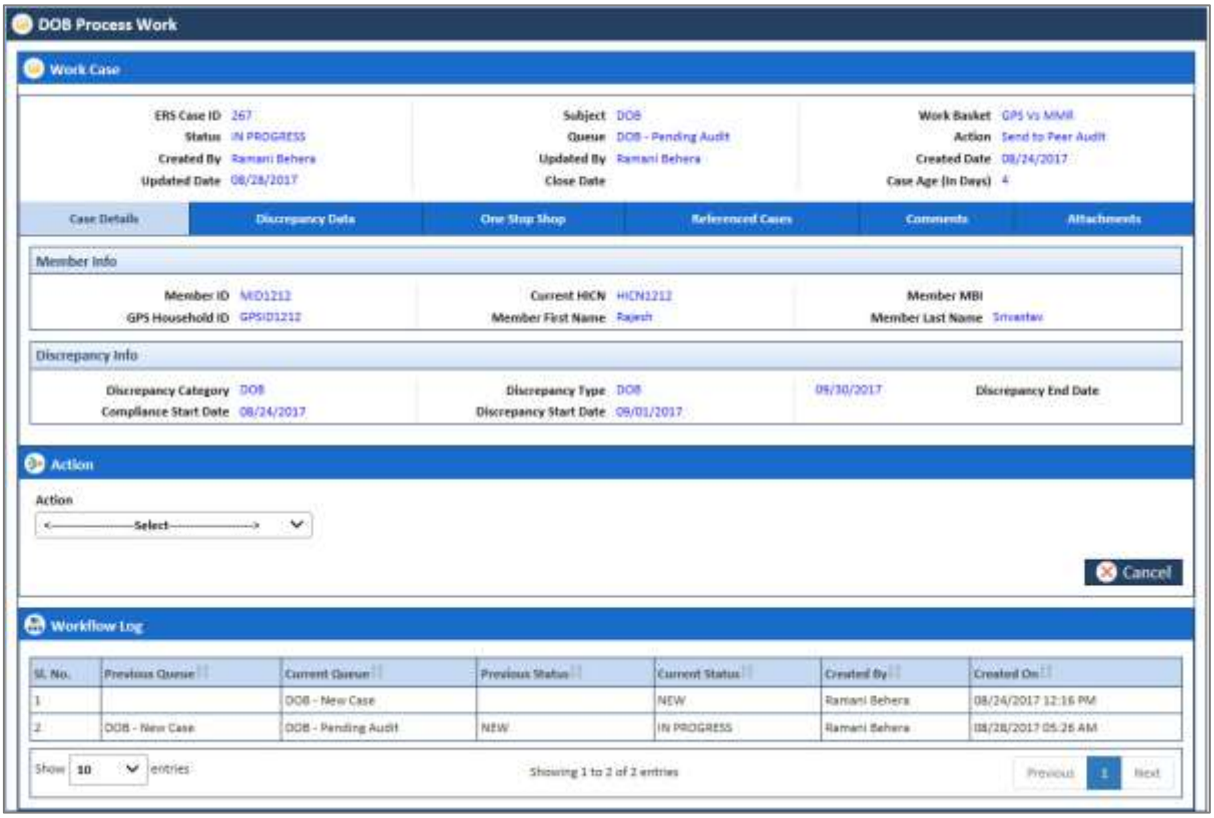


Figure 4-48: The DOB Process Work form

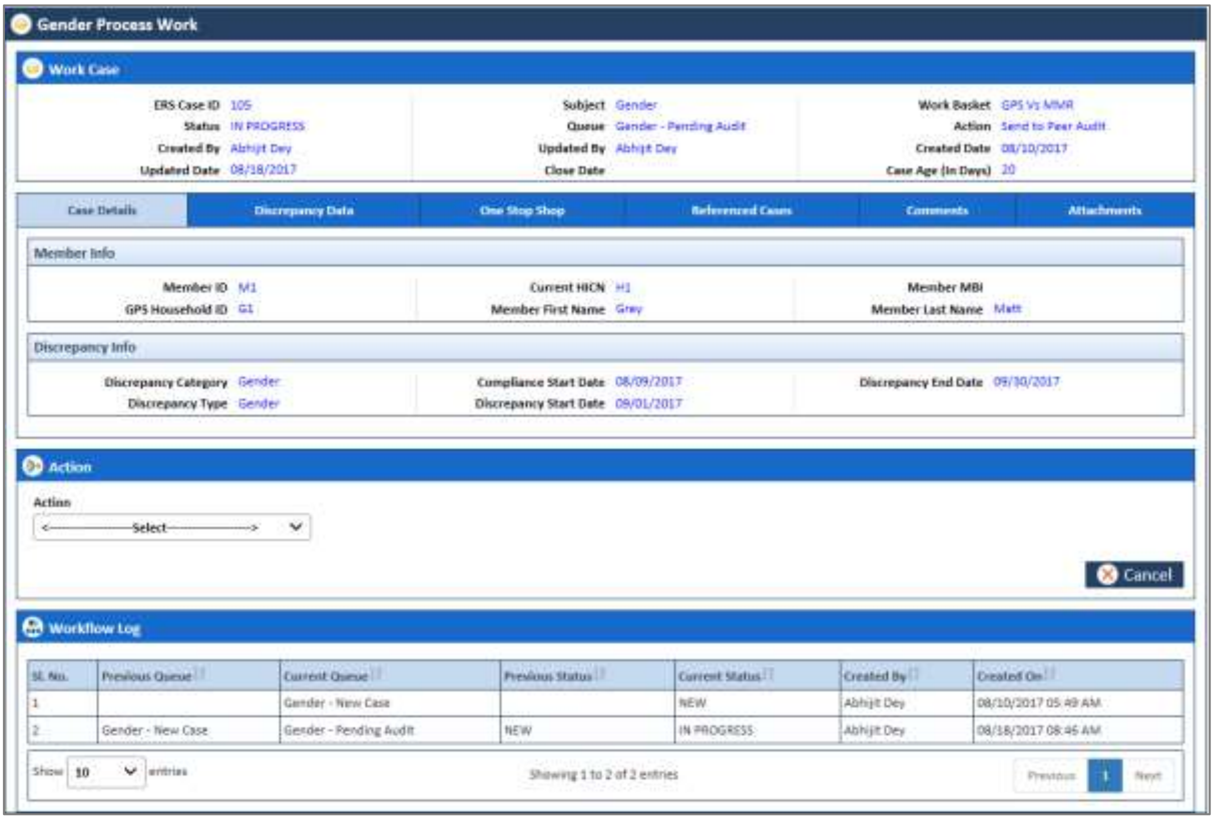


Figure 4-49: The Gender Process Work form

4.2.3.2 Before working on the DOB/Gender Process Work form

Before you work on the DOB/Gender Process Work form, you must familiarize yourself with related interfaces and forms that trigger to the form.

For more information, refer to the Before working on the Eligibility Process Work form section.

4.2.3.2.1 Viewing Reports

<place holder for image and contact>

4.2.3.3 DOB/Gender Process Work form

The DOB/Gender Process Work form has multiple sections such as Work Case, Action, and Workflow Log. The Work Case section of the form contains multiple tabs such as Case Details, Discrepancy Data, One Stop Shop, Reference Cases, Comments, and Attachment section.

The following section discusses details about the workflow involved in the new cases. All the associated actions, next queues, next statuses are described in the DOB/Gender Queues and Actions section.

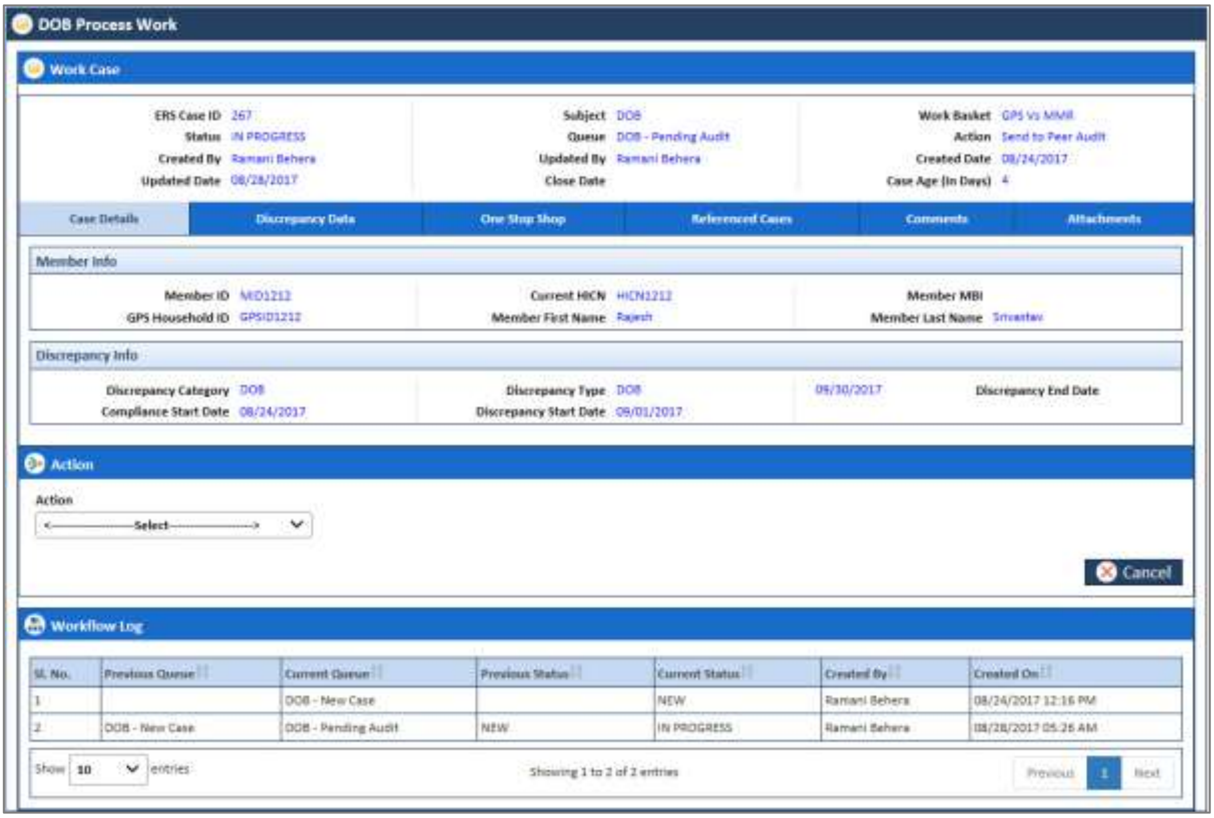
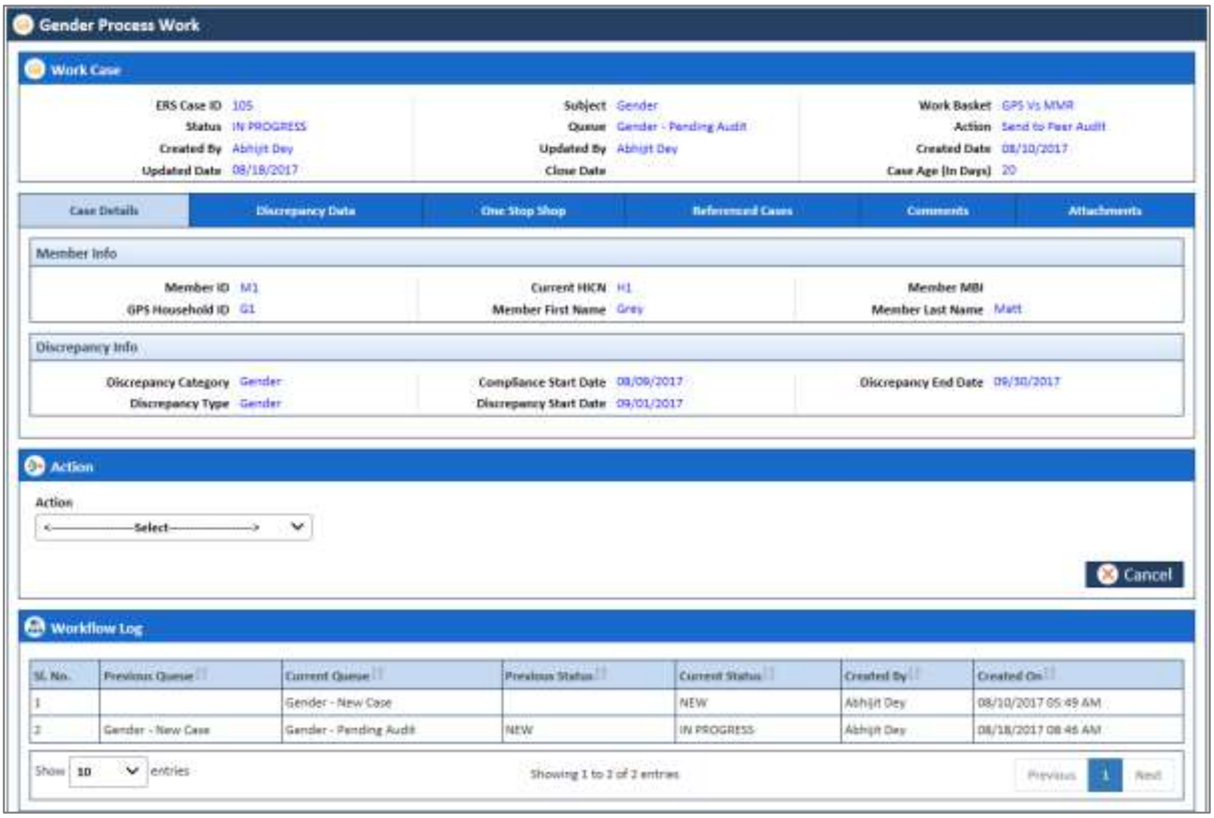


Figure 4-50: The DOB Process Work form



4.2.3.4 Work Case Section> Header

All the fields are available in the read-only mode and are auto-populated from the Create DOB/Gender Case. For more information, refer to Work Case Section> Header section.

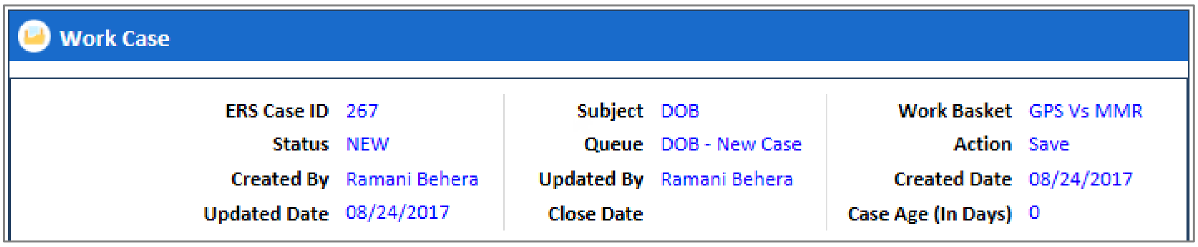


Figure 4-51: Work Case Section (DOB)> Header Section

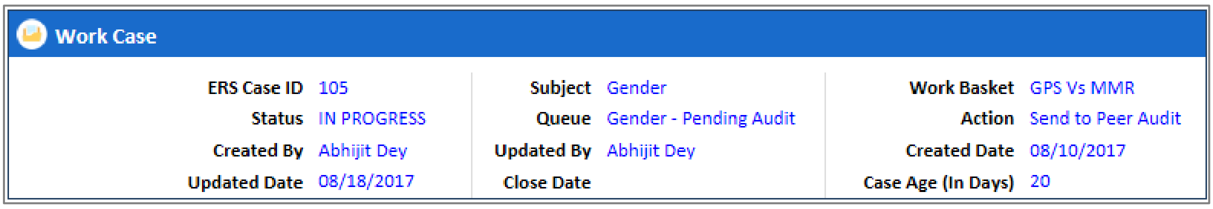


Figure 4-52: Work Case Section (Gender)> Header Section

For more information, refer to Work Case Section> Header section.

4.2.3.5 Work Case Section> Case Details Tab

The Case Details section, displays the member info and discrepancy info. For more information, refers to the Work Case Section> Case Details Tab section.

Figure 4-53: Work Case Section (DOB)> Case Details Tab

Figure 4-54: Work Case Section (Gender)> Case Details Tab

Field Name	Description
Case Details tab> Member Info section All the values are auto-populated **GPS Data** section of the **Create DOB/Gender Case** form.	
Member ID	Displays the member ID.
Current HICN	Displays the Current HICN.
Member MBI	Displays the Member MBI
GPS Household ID	Displays the GPS Household ID.
Member First Name	Displays the Member First Name.
Member Last Name	Displays the Member Last Name.
Case Details tab> Discrepancy Info section **All the values are auto-populated GPS Data section of the Create DOB/Gender Case form.**	
Discrepancy Category	Displays the discrepancy category.
Discrepancy Type	Displays the Discrepancy type.
Compliance Start Date	Displays the compliance start date.

Field Name	Description
Discrepancy Start Date	Displays the discrepancy start date.
Discrepancy End Date	Displays the discrepancy end date.

For information on Case Details fields, refer to the Work Case Section> Case Details Tab section.

4.2.3.6 Work Case Section> Discrepancy Data Tab

4.2.3.6.1 Discrepancy Data Tab> Discrepancy Data Sub-tab

These data are populated from GPS.

For DOB, newly manually created cases, this is retrieved from field in Action Details. Otherwise for system generated records, data is retrieved from GPS.

Figure 4-55: Discrepancy Data Tab (DOC)> GPS Data Sub-tab

Figure 4-56: Discrepancy Data Tab (Gender)> GPS Data Sub-tab

Field Name	Description
Discrepancy Data tab>Discrepancy sub-tab> GPS Data section All the values are auto-populated **GPS Data** section of the **Create Case** form.	
DOB	This field displays the DOB.
Discrepancy Data tab> Discrepancy sub-tab>MMR Data section **All the values are auto-populated GPS Data section of the Create DOB/Gender form.**	
DOB	This field displays the DOB.

4.2.3.6.2 Discrepancy Data Tab> UPSC Data Sub-tab

For more information on Output section of the UPSC Data sub tab, refer to the Discrepancy Data Tab> UPSC Data Sub-tab section.

4.2.3.7 Work Case Section> One Stop Shop Tab

Figure 4-57: Work Case Section (DOB)> One Stop Shop Tab

Figure 4-58: Work Case Section (Gender)> One Stop Shop Tab

For more information, refer to the Work Case Section> One Stop Shop Tab section.

4.2.3.8 Work Case Section> Reference Cases Tab

For more information on reference tab, refer to the Work Case Section> Reference Cases Tab section.

4.2.3.9 Work Case Section> Comments Tab

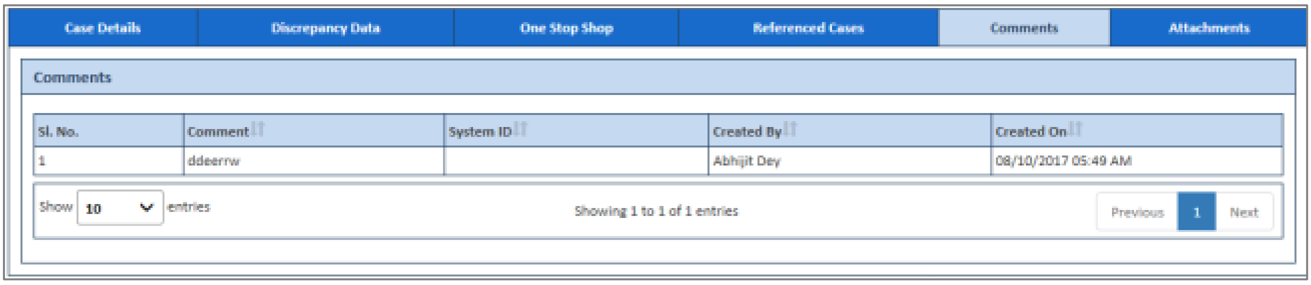


Figure 4-59: Work Case Section (DOB)> Comments Tab

Figure 4-60: Work Case Section (Gender)> Comments Tab

For more information, refer to the Work Case Section> Comments tab section.

4.2.3.10 Work Case Section> Attachment tab

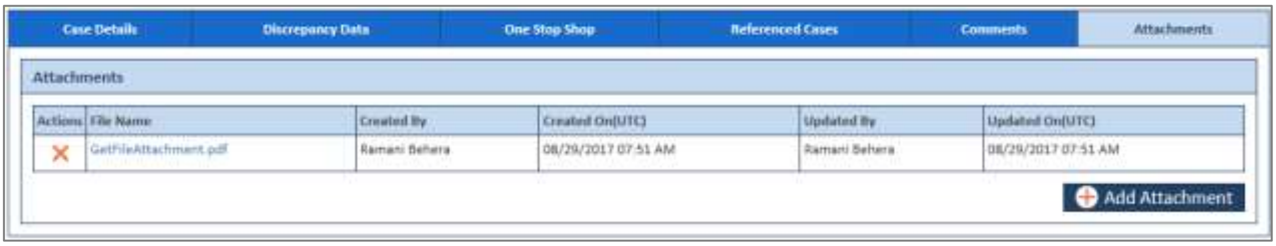


Figure 4-61: Work Case Section> Attachment tab

Figure 4-62: Work Case Section> Attachment tab on> Attachment section

For more information, refer to the Work Case Section> Attachments tab section.

4.2.3.11 DOB/Gender Work> Action Section

For more information on various action values in the DOB queue, refer to DOB/Gender Queues and Actions section. For more information on various action values in the Gender queue, refer to DOB/Gender Queues and Actions section.

4.2.3.11.1 Action Values

Certain options display for all records in any DOB & Gender queue, while others only display when in certain DOB & Gender queues. The section below provides the definition for each.

Action Values	Description
Add Comments	Select this action value to add your comments about the case while working on the queue. The status of the queue becomes In Progress and the queue is routed to the Processing Queue as New DOB/Gender Queue after you add the comments and click the Save button after selecting value Add comments. Upon save, the application keeps the status as In Progress and the case stays assigned to the user. In addition, if discrepancy is for DOB, then the queue shall be updated to DOB - Pending. If discrepancy is for Gender, then the queue shall be updated to Gender - Pending.
Close Case	Select this action value to close the case. If you select this option, two fields Resolution and Reason appear. The queue is routed to the Completed Queues list as Completed queue with the status Resolved – Completed if you click the Save button after the selecting the value Close Case.
Send to Peer Audit	Select this value to send the DOB/Gender for peer audit. . The queue is routed to the Processing Queues list as Pending Audit queue with the status In Progress if you click the Save button after selecting the Send to Peer Audit.
Pend Case	Select this value to make the case pending for more research on the case. The queue is routed to the Processing Queues list as Pended queue with the

Action Values	Description
	status In Progress if you click the Save button after selecting the value Pend Case.
Update GPS	Select this value to update the plan. After you select this value, you must provide the resolution and root causes. The values in Resolution and Root Causes after you select this action are same if you select the value Update Plan & Create RPR field. The queue is routed to the Completed Queues list as Completed queue with the status Resolve - Completed if you click the Save button after selecting the value Update Plan.
Peer Audited Completed	Select this value if you want to complete peer value. This action value appears to case in the **DOB/Gender -- Pending Audit** case. The case comes to the **DOB/Gender -- Pending Audit** case, if the action value **Send to Peer Audit** selected while in the new DOB/Gender case form.

***Note**: When the eligibility is sent for peer audit by selecting the action value **Send to Peer Audit**, the case routes to the **DOB/Gender Pending Audit** queues with the status **In Progress**.*

***Note:** If the peer auditor selects the value **Peer Audit Completed** in the **Action** field and selects the value **Yes** in the **Contains Error** field, the peer audit process is failed. And the cases routes to the **Peer Audit Failed queue**.*

***Note**: If the peer auditor selects the value **Peer Audit Completed** in the **Action** field and selects the value **No** in the **Contains Error** field, the cases routes to the new case queue.*

Associated fields in the Action section

The following table shows the fields those appear based on selection of certain value in the Action field of the queue form. This table also displays some fields which appears based on selection certain values in the fields which appears after selection of the certain values in the Action field.

Associated Fields	Appears when…	Description
Comments	You select the value Add Comments, Close Case, Pend Case, Update GPS, Send to Peer Audit, and Peer Audit Completed the Action field.	Enter your comments about the action you selected while working on the queue. You can enter comments based on the values you select in the Action field. The comments you enter will appears in the next work flow.
Resolution	You select the value Close Case in the Action field.	Select the appropriate resolution from the list. Based on the action value, the value in this field varies.
Root Cause	You select the value Close Case in the Action field.	Select the appropriate root cause in this field. Based on the action value, the value in this field varies.
Pend Reason	You select the value Pend Case in the Action field.	Select the appropriate reason for making the case a pend case. The

Action buttons

Action button	Description
Save	Click this button to send the form to next workflow level.
Reset	Click this button to remove any of the selection from the form.
Cancel	Click this button to cancel the process of the processing the case. If you click this button, an error message, Are you sure want to leave this page? appears. You can click the Yes to cancel the process, or else click No.
History	Click this button to view the detailed history of the case.

4.2.3.12 DOB/ Gender Process Work >Workflow Log Section

The workflow log provides the details about various cases such as their current and previous statuses and queues, date on when it was created and the associated roles.

Figure 4-63: Workflow Log Section (DOB)

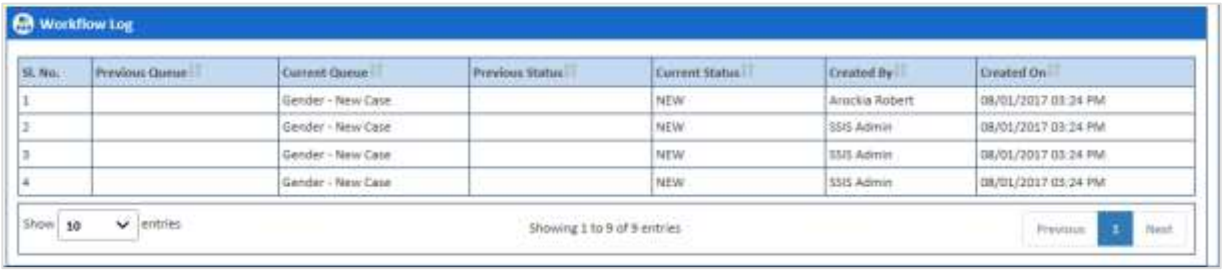


Figure 4-64: Workflow Log Section (Gender)

Columns Name	Description
Sl. No.	Displays the serial numbers of the cases in the table.
Previous Queue	Displays the name of the previous queue of the case.
Current Queue	Displays the name of the current queue of the case.
Previous Status	Displays the name of the previous status of the case.
Current Status	Displays the name of the previous current of the case.
Created By	Displays the name of the role that created case.
Created On	Displays the date when the case was created.

4.3 OST Queues

OST queues help you access and work on the OOA, SSC, and TRR queues for reviewing the cases added. These queues have the following sections and tabs in the queue form. The name of the queue form is based on the type discrepancies or module like <Queue module name> Process Work. For example, if you are accessing the OOA queue, the case form name will be OOA Process Work form. The queue case form has the following sections and tabs.

- Header section
- Case Details tab
- One Stop Shop tab
- TRR Data tab
- CMS Transaction Details tab
- Referenced cases tab
- Comments tab
- Attachments tab
- Action Section
- Workflow Log section

4.3.1 Working on OOA Queues

With appropriate access rights, you can access the OOA queues from the OOA Queue Summary page and work on the OOA Process Work form. You can select from multiple queues to retrieve the next new work item in an OOA queue directly from the application.

Based on the OOA record age, OOA queue records are presented in the application. The age of the record is decided by differentiating the current date from the Compliance Start Date.

4.3.1.1 OOA Queues and Actions

The below table provides the details of the OOA Queues, action values in respective queues. This also provides the list of next queues and next statuses.

Current Queue	Queue Type	Action Taken	Next Queue	Next Status
OOA Queues This section provides the details of all the OOA queues, their associated actions values in the Action fields, next queues of the current queues and the next statuses.				

Current Queue	Queue Type	Action Taken	Next Queue	Next Status
New Case	Process Queue	Send SCC Update to CMS	Submit to CMS	In Progress
		Send OOA Letter	Pending - NOT	In Progress
		Pend Case	Pended	In Progress
		Send to Peer Audit	OOA - Pending Audit	In Progress
		Close Case	Completed	Resolved- Completed
		Add Comments	New OOA Case	New / In-progress
MIIM Updated	Process Queue	Send SCC Update to CMS	Submit to CMS	In Progress
		Send OOA Letter	Pending - NOT	In Progress
		Pend Case	Pended	In Progress
		Send to Peer Audit	OOA - Pending Audit	In Progress
		Close Case	Completed	Resolved- Completed
		Add Comments	MIIM Updated	In-progress
Open-NOT	Process Queue	Send Notification of Termination Letter	Pending – FTT	In Progress
		Pend Case	Pended	In Progress
		Close Case	Completed	Resolved- Completed
		Add Comments	Open-NOT	In Progress
Open - Disenroll	Process Queue	Extend Tracking	Pending – FTT	In Progress
		Pend Case	Pended	In Progress
		Close Case	Completed	Resolved-Completed
		Add Comments	Open - Disenroll	In Progress
MARx Address Letter	Process Queue	MARx Address Completed	Pending - FTT	In Progress
		Pend Case	Pended	In Progress
		Close Case	Completed	Resolved- Completed
		Add Comments	MARx Address Letter	In Progress
Address Scrub	Process Queue	Address Scrub Completed	Pending - FTT	In Progress
		Pend Case	Pended	In Progress
		Close Case	Completed	Resolved- Completed
		Add Comments	Address Scrub	In Progress
Pending Audit	Process Queue	Peer Audit Completed	New OOA Case / MIIM Updated	In Progress
		Pend Case	Pended	In Progress
		Close Case	Completed	Resolved- Completed
		Add Comments	OOA - Pending Audit	In Progress
Pended	Process Queue	<>	<>	<>
Peer Audit Failed	Process Queue	Add Comments	Peer Audit Failed	In Progress
		Close Case	Completed	Resolved- Completed
		Pend Case	Pended	In Progress
		Send to Peer Audit	OOA - Pending Audit	In Progress

4.3.1.2 Before working on the OOA Process Work form

Before you work on the OOA Process Work form, you must familiarize yourself with related interfaces and forms that trigger to the form.

4.3.1.2.1 OOA Queue Summary

This page provides detailed list of various OOA queues. For more information accessing OOA Queue Summary form, refer to the Types of queues section.

Figure 4-65: The OOA Queue Summary Page

Field Name	Description	
Start Date	Enter the start date of the case.	
End Date	Enter the end date of the cases.	
View button	Click this button to view the queue created between these dates.	
Processing Queues	**Count**	**Action**
New Case	Displays the count	Displays the action icons a user can take. User can edit queue, view the queue, and view the report.
MIIM Updated		
Open-NOT		
Open - Disenroll		
MARx Address Letter		
Address Scrub		
Pending Audit		
Pended		
Peer Audit Failed		
Processing Queues	**Count**	**Action**
Pending FTT	Displays the count	Displays the action icons a user can take. User can edit queue, view the queue, and view the report.
Pending NOT		
Submit to CMS		
Update Sent to CMS		
Processing Queues	**Count**	**Action**
Completed	Displays the count	Displays the action icons a user can take. User can edit queue, view the queue, and view the report.
CMS Accepted		

4.3.1.2.2 Viewing cases from queues

You access the form through the queues by clicking the Get Queue icon in the Actions column of the OOA Case Summary page. The Work Item - OOA form appears. Based on the case details, you open the case by clicking the Start Processing button.

Figure 4-66: Work Item - OOA form

Field Name	Description
ERS Case ID	Displays the ERS case id.
Current HICN	Displays the current HICN.
Discrepancy Start Date	Displays the discrepancy start date.

Field Name	Description
Compliance Start Date	Displays the compliance start date.
Member First Name	Displays the member first name.
Member Last Name	Displays the member last name.
Start Processing	Click this button to pen the form.
Get Next	Click this button to get the next case details.
Cancel	Click this button to cancel the process.

4.3.1.2.3 Viewing cases from queues

You can view the queues by clicking the View Queue icon in the Actions column of the OOA Case Summary page. The Search form appears. This form helps you to search the queues and work on the related cases.

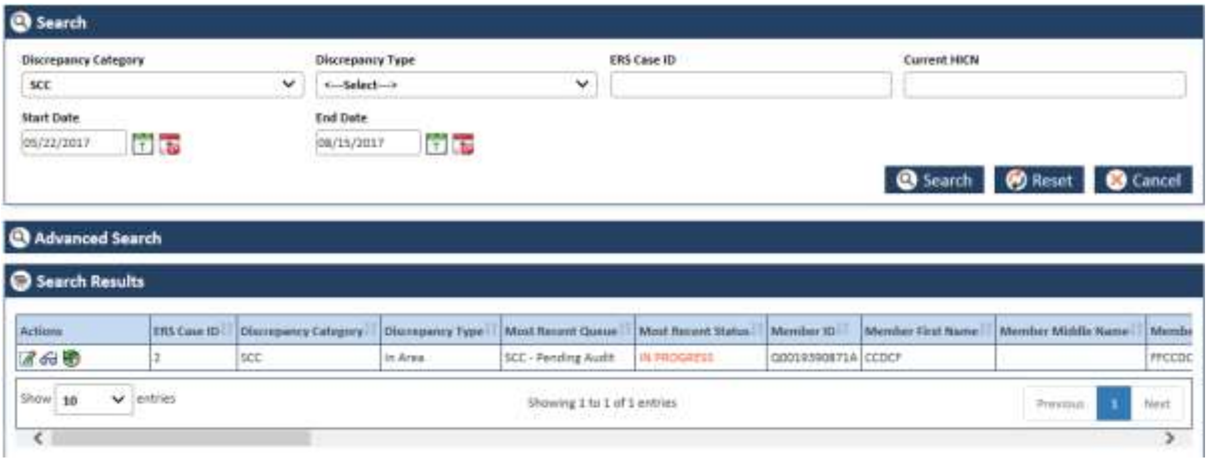


Figure 4-67: The OOA Queue Search form

For more information on how to search cases, refer to the Searching OOA Queues section.

4.3.1.2.4 Viewing Reports

<Place holder for image and contact>

4.3.1.3 OOA Process Work form

The OOA Process Work page has multiple sections such as Work Case, Action, and Workflow Log. This Work Case section of the form contains multiple tabs such as Case Details, One Stop Shop, TRR Data, CMS Transaction Details, Reference Cases, Comments, and Attachment section.

The following section discusses details about the workflow involved in the new cases. All the associated actions, next queues, next statuses are described in the section.

Note*: All the fields marked with asterisk in the form are mandatory fields.*

To work on the cases in the OOA queues, you have to access the **OOA Process Work** form.

Navigation:

To access the **OOA Process Work** form:

1. Go to **Application** menu, point to OST>OAA and click the Get Queue link.

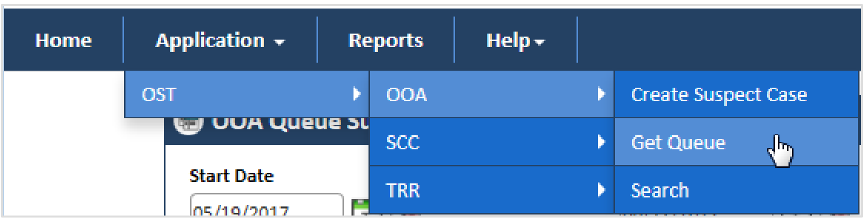


Figure 4-68: Accessing OOA Queue Summary Page

The **OOA Queue Summary** page appears.

2. Click the queue icon under the **Action** column in the **OOA Queue Summary** form.

Figure 4-69: The OOA Queue Summary page

The **Work Item – OOA** page appears.

3. Click the **Start Processing** button open the **OOA Process Work** form.

Figure 4-70: The Work Item--OOA section

4. Click the **Get Next** to open the next work item.
5. Click **Cancel** to cancel the process of opening the queues.

The OOA Process Work form

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Figure 4-71: The OOA Process Work form

4.3.1.4 Work Case Section> Header

All the fields are available in the read-only mode.

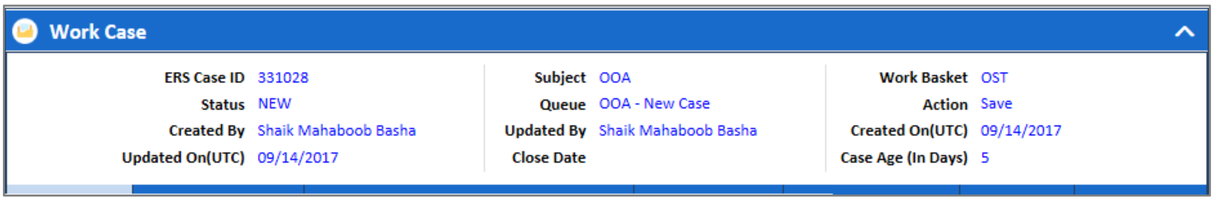


Figure 4-72: Work Case Section> Header Section

Field Name	Description
ERS Case ID	Displays the ERS Case ID.
Status	Displays the current status.
Created By	Displays the user that created the case.
Updated On (UTC)	Displays the date on which the case was updated.
Subject	Displays the subject. If this is OOA case the subject should display the value OOA.
Queue	Displays the current queue to which this case belongs to.
Updated By	Displays user name that updated the case.
Close Date	Doesn't display the case close date until the case is closed.
Work Basket	Displays the current work basket.
Action	Displays the last action taken.
Created On (UTC)	Displays the case creation date.
Case Age (In Days)	Displays the case age.

4.3.1.5 Work Case Section> Case Details Tab

The values are populated from the **Create OOA Case** form while creating the new OOA case.

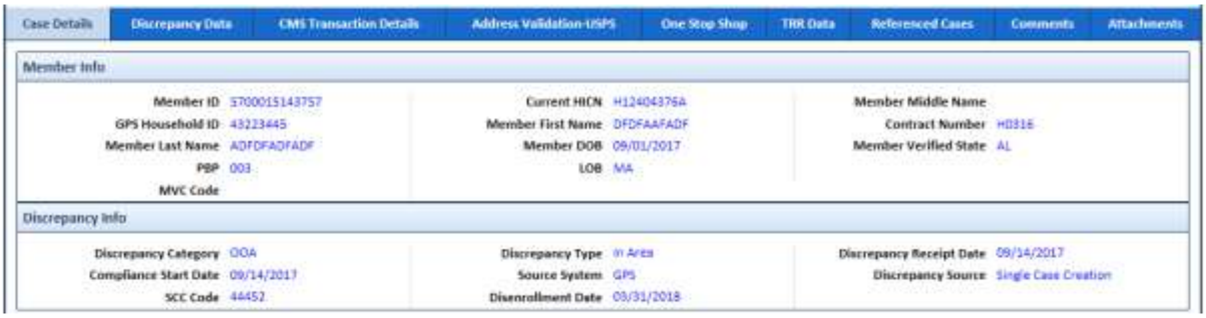


Figure 4-73: Work Case Section> Case Details Tab

Field Name	Description
Member info All the values are auto-populated **Member Info** section of the **Create OOA Case** form.	
Member ID	Displays the member ID.
Current HICN	Displays the HICN number.
Member Middle Name	Displays the middle name of the member.
GPS Household ID	Displays the GPS household ID.
Member First Name	Displays the first name of the member.
Contract Number	Displays the contract number.
Member Last Name	Displays the last name of the member.
Member DOB	Displays the DOB the member.
Member Verified State	Displays the member verified state.
PBP	Displays the PBP.
LOB	Displays the LOB.
MVC Code	Displays the member verified country code.
Discrepancy info All the values are auto-populated from GPS**.**	
Discrepancy Category	Displays the discrepancy category.
Discrepancy Type	Displays the discrepancy type.
Discrepancy Receipt Date	Displays the discrepancy receipt date.
Compliance Start Date	Displays the compliance start date.
Source System	Displays the source for the information.
Discrepancy Source	Displays the discrepancy source.
SCC Code	Displays the SSC Code.
Disenrollment Date	Displays the disenrollment date.

4.3.1.6 Work Case Section> Discrepancy Data Tab

Discrepancy Data Tab> GPS Data Sub-tab

This tab displays all the discrepancy data populated from GPS.

Figure 4-74: The Discrepancy Data Tab> GPS Data Sub-tab

Field Name	Description
Discrepancy This sub tab displays the al the GPS data.	
HICN	Displays the HICN.
LOB	Displays the LOB.
PBP	Displays the PBP.
Date of Birth	Displays the member date of birth.
City	Display the city to which the member belongs to.
Plan Effective Date	Displays the plan effective date.
SCC Effective Date	Displays the SCC effective date.
Out of Area Indicator	Displays the out of area indicator.
Application Approved Status	Displays the application approved status.
Member ID	Displays the member ID
Line of Business Desc	Displays the Line of Business Disc.
First Name	Displays the first name of the member.
Address Line 1	Displays the Address of the member in line 1
Zip Code 5	Displays the Zip Code 5 of the address.
State	Displays the state to which the member belongs to.
Plan Term Date	Displays the term date of a plan.
SCC End	Displays the SCC end date.
GPS OOA Disenrollment Date	Displays the GPS OOA disenrollment date.
GPS Household ID	Displays the GPS Household ID.
Contract Number	Displays the contract number.
Last Name	Displays the last name of the member.
Address Line 2	Displays the address of the member in line 2.
Zip Code 4	Displays the Zip Code 4 of the address.
SCC Code	Displays the SCC Code.
Application Information	Displays the application information.
PDP Auto Enrollee Indicator	Displays the PDP Auto Enrollee Indicator.
Individual Id	Displays the Individual ID.

4.3.1.7 Work Case Section> CMS Transaction Details Tab

The values in the section appears from matching fields, if you select the value Send SCC Update to CMS in the Action section of the OOA Process Work form and save the form. If you access the Submit to CMS queue and access the queue, you can see the detailed updated in the CMS Transaction Details tab of the form.

*Note: If a user selects the value **Send SCC Update to CMS** in the **Action** section of the **OOA Process Work** form and save the form, the queue routed to the **Holding** queue as **Submit to CMS** queue.*

Figure 4-75: Work Case Section> CMS Transaction Details Tab

If you visit the Holding Queues and view the record (OOA Process Work) corresponding to the ERS Case ID, you can view the details updated in the CMS Transaction Details tab. You can also see that the comments section is updated with the latest comment you provided.

For more information, refer to the Accessing Holding Queues section.

Figure 4-76: Work Case Section> Updated CMS Transaction Details Tab

Field Names	Description
Case Number	Displays the case number.
Date of Birth	Displays the DOB of the member.
Transaction Type Code	Displays the transaction type code.
Effective Date	Displays the effective date of the record.
EGHP Indicator	Displays the value for EGHP Indicator.
HICN	Displays the HICN.
Contract ID	Displays the contract ID
Application Date	Displays the application date of the case.
Resolution	Displays the resolution.
Explanation of the Root Cause	Displays the root cause explanation of the issues.
Last Name	Displays the last name of the member.
PBP	Displays the PBP.
Election Type	Displays the type of election.
Root Cause	Displays the root cause of the issues.
Verified Root Cause	Displays the verified root cause of the issues

4.3.1.8 Work Case Section> Address Validation-USPS tab

Field Name	Description
Validate Address This sub-tab helps you enter and validate the member address.	
Address1	Enter the address in the member address. If the address is not put or put wrongly, the error message, Address Not Found.

Field Name	Description
	appears.
Address2	Enter the address in the member address. If the address is not put or put wrongly, the error message, Address Not Found. appears.
City	Enter the name of the city. If the city code is not put or put wrongly, the error message, Invalid City. appears.
City/State button	Click this button to validate the city name. If you click this button, values in the City, State, and Zip5 value appears in the Output section.
State	Enter the state code. For example, for New Jersey, enter NJ. If the State code is not put or put wrongly, the error message, Invalid State Code. appears.
Zipcode	Enter the zip code.
Zipcode button	Click this button to validate the zip code. If you click the Validate button, then the values in the Address1, Address2, City, State, Zip5 and Zip4 value appears in the Output section. If the ZIP code is not put or put wrongly, the error message, ZIP Code must be 5 characters. appears.
Validate button	Click this button to validate the address in the Output section. After entering the address, if you click the Validate button, then the values in the Address1, Address2, City, State, Zip5, and Zip4 value appears in the Output section.
Reset button	Click this button to remove all the address details.
Output This sub-tab helps you view the validated member address.	
Address1, Address2, City, State, Zip5, and Zip4	All the values appear in read-only mode.

4.3.1.9 Work Case Section> One Stop Shop Tab

This section displays a report.

Figure 4-77: Work Case Section> One Stop Shop Tab

4.3.1.10 Work Case Section> TRR Data Tab

4.3.1.10.1 TRR Data Tab> Summary Information Sub-tab

Figure 4-78: TRR Data Tab> Summary Information Sub-tab

4.3.1.10.2 TRR Data Tab> Bad Transaction History Sub-tab

Figure 4-79: TRR Data Tab> Bad Transaction History Sub-tab

4.3.1.10.3 TRR Data Tab> Bad Transaction Pending Sub-tab

Update the content after the page is developed.

Figure 4-80: TRR Data Tab> Bad Transaction Pending Sub-tab

4.3.1.10.4 TRR Data Tab> Response Sub-tab

Update the content after the page is developed.

Figure 4-81: TRR Data Tab> Bad Transaction Response Sub-tab

4.3.1.11 Work Case Section> Reference Cases Tab

This tab of the form displays all the cases related to this case.

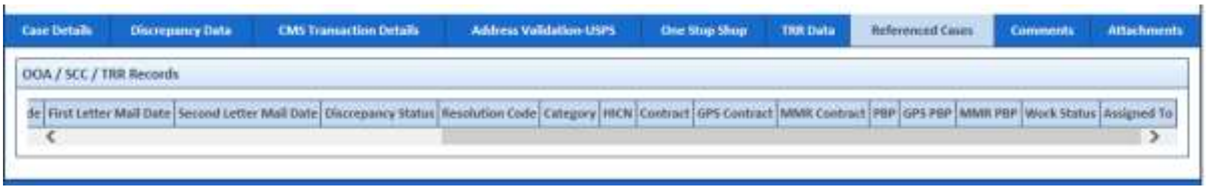


Figure 4-82: Work Case Section> Reference Cases Tab

4.3.1.12 Work Case Section> Comments Tab

If you visit the Holding Queues and view the record (OOA Process Work) corresponding to the ERS Case ID, you can view the comments you entered updated in the Comments tab. You can also see that the, comment s section is updated with the latest comment you provided.

For more information, refer to the Accessing Holding Queues section.

Figure 4-83: Work Case Section> Comments Tab

Column Name	Description
Sl. No.	The serial no of the comments list is displayed.
Comment	The comments appear in this column is displayed.
Source System	The source system is displayed.
Created By	The name of the user that created the case is displayed.
Created On	The date when the case was created is displayed.

4.3.1.13 OOA Process Work> Action Section

Based on the work basket select while login or module you access, the action values changes in the respective queues forms. For more information on various action values in ERS queues, refer to Various Queues and related actions section.

For more information on various action values in the OOA queue, refer to OOA Queue Actions and related queues and statues section.

Action Values

Action Values	Description
Add Comments	Select this action value to add your comments about the case while working on the queue. The status of the queue becomes In Progress and the queue is routed to the Processing Queue as New OOA Queue after you add the comments and click the Save button.
Close Case	Select this action value to close the case. If you select this option, two fields Resolution and Reason appear. The queue is routed to the Completed Queues list as Completed queue with the status Resolved – Completed if you click the Save button.
Pend Case	Select this value to make the case pending for more research on the case. The queue is routed to the Processing Queues list as Pended queue with the status In Progress if you click the Save button.
Send OOA Letter	Select this value to send the OOA letter to the member. The queue is routed to the Holding Queues list as Pending – Not queue with the status In Progress if you click the Save button.
Send SCC Update to CMS	Select value to send the SSC update to CMS. The queue is routed to the Holding Queues list as Submit to CMS queue with the status In Progress if you click the Save button. If you select this action value and save the form, a warning message ‘**Do you want for CMS Update?**’’ appears.
Send to Peer Audit	Select this value to send the case for peer audit. The queue is routed to the Holding Queues list as **Submit to CMS** queue with

Action Values	Description
	the status **In Progress** if you click the Save button.
Peer Audit completed (Appears in the **OOA - Pending Audit** Queue form)	Select this value to show if the peer audit is completed or not.
Address Scrub Completed (Appears in the **OOA - Address Scrub** Queue form)	Select this value if the address scrub is completed.
MARx Address Completed (Appears in the **MARx Address Letter Queue** form)	To be updated.
Residential Doc Required/County Attestation Required	To be updated.
Extend Tracking (Appears in the **Open - Disenroll** Queue form)	To be updated.
Send Notification of Termination Letter	To be updated.

Associated fields in the Action section

The following table shows the fields those appear based on selection of certain value in the Action field of the queue form. This table also displays some fields which appears based on selection certain values in the fields which appears after selection of the certain values in the Action field.

Associated Fields	Appears when…	Description
Comments	You select the value Add Comments, Close Casein, Pend Case, Send OOA Letter, Send SCC Update to CMS, and Send to Peer Audit the **Action** field.	Enter your comments about the action you selected while working on the queue. The comments you enter will appears in the next work flow.
Resolution	You select the value **Close Case** in the **Action** field.	Select the appropriate resolution from the list for which you are closing the case. The following value are available in this field: • Added to SCC RPR SharePoint • Attested No Incarceration • Auto Enrolled • False Discrepancy • IA • Member Response OOA Term • NO Response FT Term • OOA Term - Incarceration • Termed
Pend Reason	You select the value **Pend Case** in the Action field.	Select the appropriate reason for making the case a pend case.
First Letter Mail Date	You select the value **Send OOA Letter** in the **Action** field. You select the value **IA** in the **Resolution** field.	Enter the date when the first mail intimations letter was sent to the members.
Last Name	You select the value **Send SCC**	Enter the last name of the member.

Associated Fields	Appears when…	Description
	Update to CMS in the Action field.	
Date of Birth	You select the value **Send SCC Update** to CMS in the **Action** field.	Enter the date of the birth of the member.
PBP	You select the value **Send SCC Update** to CMS in the Action field.	Select the PBP.
Contract Number	You select the value **Send SCC Update** to CMS in the **Action** field.	Select the contract number.
Application Date	You select the value **Send SCC Update** to CMS in the **Action** field.	Enter the application date of the case.
Effective Date	You select the value **Send SCC Update** to CMS in the **Action** field.	Enter the effective date of the case.
End Date	You select the value **Send SCC Update** to CMS in the Action field.	Enter the end date of the case.
Initial Address Verification Date	You select the value **Member Response OOA Term** in the **Resolution** field.	Enter the date when the address of the member verified first.
Member Response Verification Date	You select the value **Member Response OOA Term** in the **Resolution** field.	Enter the date when the member response was verified first.
Member Verified State	You select the value **Member Response OOA Term** in the **Resolution** field.	Enter name the state to which the verified member belongs to.
Second Letter Mail Date	You select the value **No Response FT Term** in the **Resolution** field	Enter the date when the second mail intimations letter was sent to the members
Contains Error	You select the value **Peer Audit Completed** in the **Resolution** field	If you select the value no in this field, then the No, then the case routes to New case. If you select the value Yes, the peer audit gets completed.

Action buttons

For more information on command buttons, refer to the Important Commands section.

Action button	Description
Save	Click this button to send the form to next workflow level.
Reset	Click this button to remove any of the selection from the form.
Cancel	Click this button to cancel the process of the reviewing the queue.
History	Click this button to view the detailed history of the case.

4.3.1.14 OOA Process Work >Workflow Log Section

The workflow log provides the details about various cases such as their current and previous statuses and queues, date on when it was created and the associated roles.

Sl. No.	Previous Queue	Current Queue	Previous Status	Current Status	Created By	Created On
1		OOA - New Case		NEW		08/08/2017 05:37 AM
2		OOA - New Case		NEW	SSIS Admin	08/08/2017 05:37 AM
3		OOA - New Case		NEW	SSIS Admin	08/08/2017 05:37 AM
4		OOA - New Case		NEW	SSIS Admin	08/08/2017 05:37 AM
5		OOA - New Case		NEW	SSIS Admin	08/08/2017 05:37 AM
6		OOA - New Case		NEW	SSIS Admin	08/08/2017 05:37 AM
7		OOA - New Case		NEW	SSIS Admin	08/08/2017 05:37 AM
8		OOA - New Case		NEW	SSIS Admin	08/08/2017 05:37 AM
9		OOA - New Case		NEW	SSIS Admin	08/08/2017 05:37 AM
10	OOA - New Case	OOA - New Case	NEW	NEW	Ramani Behera	08/21/2017 07:56 AM

Show 10 entries
Showing 1 to 10 of 10 entries
Previous 1 Next

Figure 4-84: Workflow Log Section

Columns Name	Description
Sl. No.	Displays the serial numbers of the cases in the table.
Previous Queue	Displays the name of the previous queue of the case.
Current Queue	Displays the name of the current queue of the case.
Previous Status	Displays the name of the previous status of the case.
Current Status	Displays the name of the previous current of the case.
Created By	Displays the name of the role that created case.
Created On	Displays the date when the case was created.

4.3.2 Searching OOA Cases

You can search various records with In-Progress and Resolve-Completed statuses. This helps you unlock for working on the records or reassigned the cases to different users. After providing the search criteria in the Search form, you can access the list of the all the records. After accessing a list of records, you can edit the edit the record, view the record and view the associated reports. You can edit the records of if those are incomplete and not assigned to any others users.

A user can have access to view all records within the Search page regardless of their permissions. However, a user cannot edit a record unless they have permissions to access the selected record.

If a user views or edits a record from the search results, upon exiting the record, the application shall navigate the user back to the search screen with search results from the last search

4.3.2.1 Searching Records

You can enter or select all the value in the search criteria for the records that you want to search for. Based on your search criteria, the respective records appear in the Search Result section.

Figure 4-85: The Search OOA records form

Field Name	Description
Discrepancy Category	Select the discrepancy category in this field. The following categories are available in this field. • OOA • SCC • TRR
Discrepancy Type	Select the discrepancy type in this field. The following values are available in this field. • In Area • Incarcerated

Field Name	Description
	• OOA
ERS Case ID	Enter the ERS case ID in this field.
Current HICN	Enter the current HICN in this field.
Start Date	Select the start date in this field.
End Date	Select the end date in this field.
Search button	Click Search button to search the records.
Reset button	Click this button to remove all the selected search criteria.
Export button	Click this button to save the search result details into a MS Excel spreadsheet. Once you click this button, the search result gets downloaded in Excel spreadsheet which you can directly open or save in the local drive.
Cancel button	Click this button to cancel the process of searching records. After you can cancel the search process, the home page appears.

4.3.2.1.1 OOA Search Result

The search result details appear after you do a search by entering the required search criteria.

Figure 4-86: Search Result

The following are the list columns that are displayed in the search result tables.

- ERS Case ID
- Discrepancy Category
- Discrepancy Type
- Most Recent Queue
- Most Recent Status
- Member ID
- Member First Name
- Member Middle Name
- Member Last Name
- Member Gender
- Member DOB
- Member Current HICN
- Member Contract Number
- Member PBP
- Member LOB
- GPS HICN
- MMR HICN

- Aging
- Member SCC Code
- GPS Household ID
- Discrepancy Start Date
- Reason
- Resolution
- Discrepancy Source
- Submission Type
- CTM Member
- EGHP Member
- Requested Effective Date
- Action Requested
- Potential Submission Date
- RPC Submission Date
- FDR Received Date
- FDR Code Received
- FDR Status
- RPR Requestor
- Created On (UTC)
- Created By
- Last Updated On (UTC)
- Last Updated By
- Locked On (UTC)
- Locked By

4.3.2.2 Conducting Advanced Record Searches

You can do an advanced search for the record by providing various search criteria. You can access the various sections or tabs of the Advanced Search form by clicking the form name, Advanced Search. This helps you view all the tabs under the Advanced Search for. If you click the tabs, you can view associated fields or search criteria.

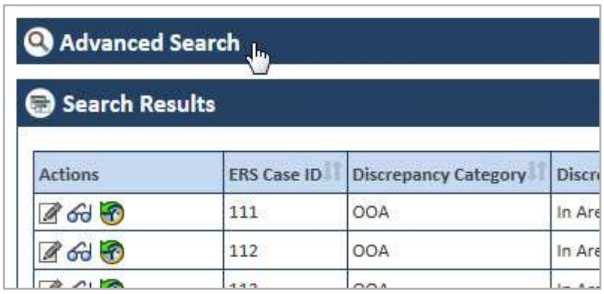


Figure 4-87: Advanced Search Form

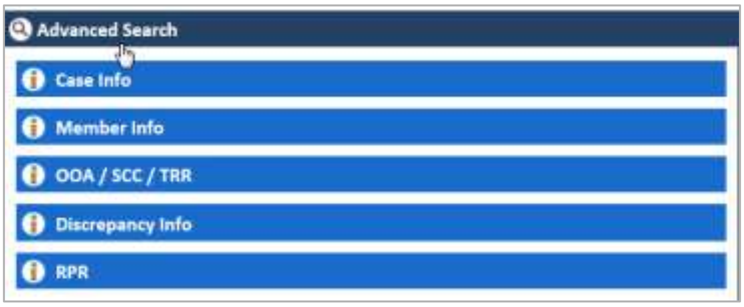


Figure 4-88: The Advanced Search Form tabs

Expand the tab:

You can expand the tab to view all the fields by click on the tab name. This helps you access all the associated fields in the tab and entered the search criterial to search the records.

Contract the tab:

You can contract the expanded tab by clicking on tab name. This will help you hide or shrink fields in the tab.

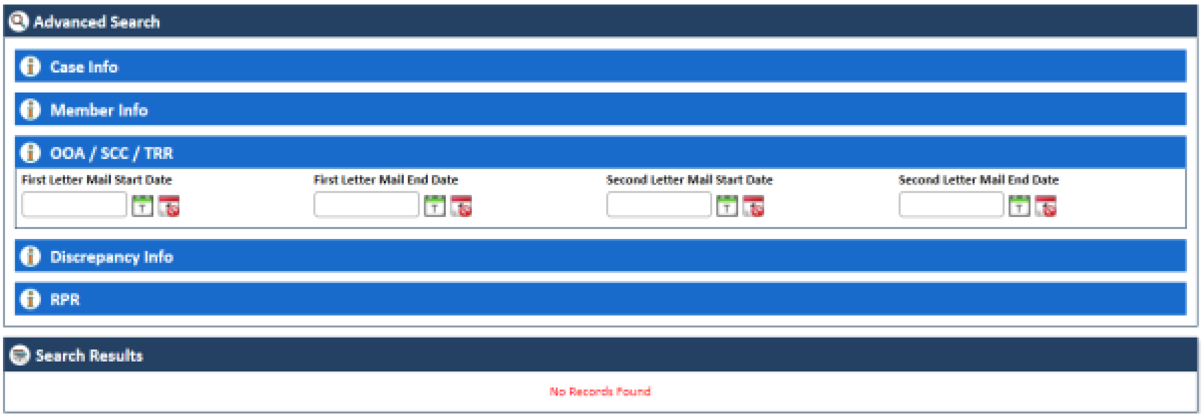


Figure 4-89: Expanded Tab

4.3.2.2.1 The Advanced Search for > Expanded Tabs

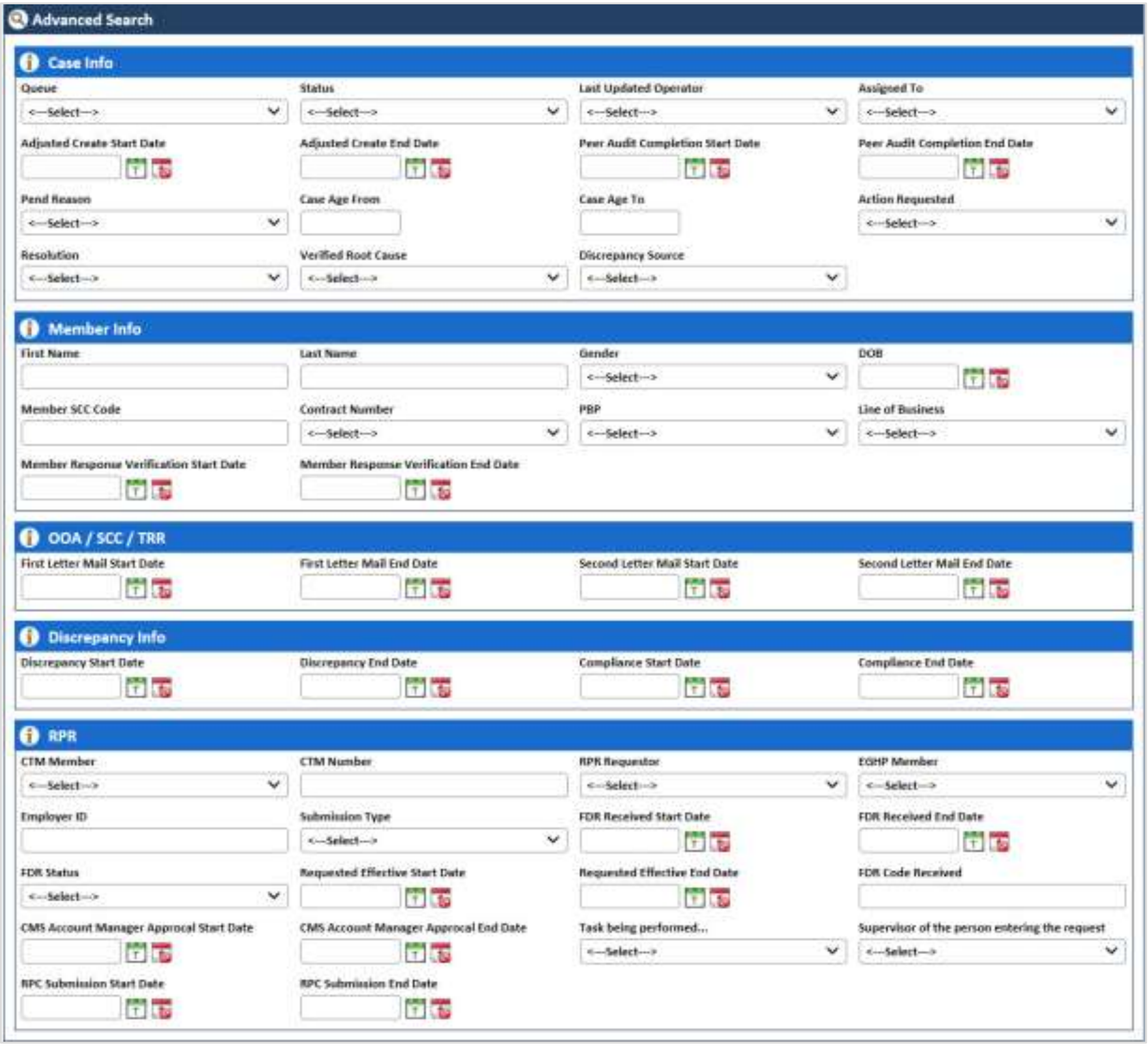


Figure 4-90: Advanced Search Form> Expanded Tabs

Field Name	Description
Case Info Enter the detailed information about the case in this tab.	
Queue	Select the queue which associated the record that you want to search. The record that you want to search belongs to this queue. All the queues of the OST modules are available in this field which includes OOA, SCC and TRR. The queues related OOA starts with OOA. For example the, new queue for OOA is OOA – New Case. Similarly, the queues for SCC and TRR cases start with SCC and TRR, respectively.
Status	Select the status of the record that you want to search. This field displays the following statuses: • **IN PROGRESS**: When a new case is responded and not completed, it becomes an **In Progress** queue. • **NEW:** When a new case is created and nit responded, it becomes a **New** queue. • **RESOLVED COMPLETED**: When and cases completed from all respective such as from users, and CMS, it becomes a **Resolved Completed** queue.
Last Updated Operator	Select the name of the operator that updated last updated the case that you want to search.
Assigned To	Select the name of the user to whom the cases was assigned to.
Adjusted Create Start Date	Select the adjusted start date of the created case that you want to search.

Field Name	Description
Adjusted Create End Date	Select adjusted end date of the created case that you want to search.
Peer Audit Completion Start Date	Select the start date when the peer audit was completed on the case that you want to search.
Peer Audit Completion End Date	Select the end date when the peer audit was completed on the case that you want to search.
Pend Reason	Select the appropriate pend reason of the case that you want to search.
Case Age From	Select the staring period of the case age of the case that you want to search.
Case Age To	Select the ending period of the case age of the case that you want to search.
Action Requested	Select the last action taken or requested on the case that you want to search.
Resolution	Select the resolution that was taken to close the cases that you want to search.
Verified Root Cause	Select the verified root cause of the cases that you want to search.
Discrepancy Source	Select the appropriate discrepancy sources of the case that you want to search.
Member Info Enter the member information in case that you want to search.	
First Name	Enter the first name of the member in case that you want to search.
Last Name	Enter the last name of the member in case that you want to search.
Gender	Select the gender of the member in case that you want to search.
DOB	Enter the date of birth of the member in the case that you want to search.
Member SCC Code	Enter the SCC code of the member in the case that you want to search.
Contract Number	Select the contract number mentioned in the case that you want to search.
PBP	Select the PBP mentioned in the case that you want to search.
Line of Business	Select the line of the business mentioned in the case that you want to search.
Member Response Verification Start Date	Enter the start date of the member verification mentioned in the case that you want to search.
Member Response Verification End Date	Enter the end date of the member verification mentioned in the case that you want to search.
OOA/SCC/TRR Enter discrepancy and compliance related dates in this tab.	
First Letter Mail Start Date	Enter the start date since when the first mail was sent to the member.
First Letter Mail End Date	Enter the end date since when the first mail was sent to the member.
Second Letter Mail Start Date	Enter the start date since when the second mail was sent to the member.
Second Letter Mail End Date	Enter the end date since when the second mail was sent to the member.
Discrepancy Info Enter the discrepancy details in this tab.	
Discrepancy Start Date	Enter the discrepancy start date of the case that you want to search. This helps you display all the record with entered discrepancy start date.
Discrepancy End Date	Enter the discrepancy end date of the case that you want to search. This helps you display all the records with entered discrepancy end date.
Compliance Start Date	Enter the compliance start date of the case that you want to search. This helps you display all the record with entered discrepancy start date.

Field Name	Description
Compliance End Date	Enter the compliance end date of the case that you want to search. This helps you display all the records with entered discrepancy end date.
RPR Enter RPR details in this tab.	
CTM Member	Select the CTM value Yes in this field if you want to consider the CTM as the search criteria of the record that you want to search.
CTM Number	Enter the CTM number in this field.
RPR Requestor	Select the value Yes if you want to consider RPR requester as the search criteria of the case that you want to search.
EGHP Member	Select the value Yes if you want to consider the EGHP
Employer ID	Enter the employee ID in this field.
Submission Type	Select the submission type of the case that to you want to search.
FDR Received Start Date	Select the start date of the received FDR of the case that you want to search. This helps you display all the records with this start date and the entered end date.
FDR Received End Date	Select the end date of the received FDR of the case that you want to search. This helps you display all the records with this start date and the entered end date.
FDR Status	Select the status of the FDR mentioned in the cases that you want to search.
Requested Effective Start Date	Enter the requested effective start date. One or multiple Effective Dates can be entered and used as search criteria. A date range is not applicable for this search option. A user can enter a single effective date or multiple effective dates.
Requested Effective End Date	Enter the requested effective end date. One or multiple Effective Dates can be entered and used as search criteria. A date range is not applicable for this search option. A user can enter a single effective date or multiple effective dates.
FDR Code Received	Enter the received FDR Code.
CMS Account Manager Approval Start Date	Enter the start date of the CMS account manager approval mentioned in the case that you want to search.
CMS Account Manager Approval End Date	Enter the end date of the CMS account manager approval mentioned in the case that you want to search.
Task being performed...	Select the appropriate task being performed in this field.
Supervisor of the person entering the request	Select the name of the supervisor of the user created the case. Allow user to type the name but the system retrieves the selected user from the application.
RPC Submission Start Date	Enter the start date of the RPC submission.
RPC Submission End Date	Enter the end date of the RPC submission.

4.3.3 Working on SSC Queues

With appropriate access rights, you can access the SSC queues from the SSC Queue Summary page and work on the SSC Process Work form. You can select from multiple queues to retrieve the next new work item in an SSC queue directly from the application.

Based on the SSC record age, SSC queue records are presented in the application. The age of the record is decided by differentiating the current date from the Compliance Start Date.

4.3.3.1 SSC Queues and Actions

The below table provides the details of the SSC Queues, action values in respective queues. This also provides the list of next queues and next statuses.

Current Queue	Queue Type	Action Taken	Next Queue	Next Status
SSC Queues This section provides the details of all the SSC queues, their associated actions values in the Action fields, next queues of the current queues and the next statuses.				
New Case	Process Queue	Send SCC Update to CMS	Submit to CMS	In Progress
		Send OOA Letter	Pending - NOT	In Progress
		Pend Case	Pended	In Progress
		Send to Peer Audit	SSC - Pending Audit	In Progress
		Close Case	Completed	Resolved- Completed
		Add Comments	New SSC Case	New / In-progress
		Send SCC Letter	Completed	Resolved- Completed
		Update GPS	Completed	Resolved- Completed
		SCC RPR Request	Pending - SCC RPR	In Progress
MIIM Updated	Process Queue	Send SCC Update to CMS	Submit to CMS	In Progress
		Send OOA Letter	Pending - NOT	In Progress
		Pend Case	Pended	In Progress
		Send to Peer Audit	SSC - Pending Audit	In Progress
		Close Case	Completed	Resolved- Completed
		Add Comments	MIIM Updated	In-progress
		Send SCC Letter	Completed	Resolved- Completed
		Update GPS	Completed	Resolved- Completed
		SCC RPR Request	Pending - SCC RPR	In Progress
Open-NOT	Process Queue	Send Notification of Termination Letter	Pending – FTT	In Progress
		Pend Case	Pended	In Progress
		Close Case	Completed	Resolved- Completed
		Add Comments	Open-NOT	In Progress
Open - Disenroll	Process Queue	Extend Tracking	Pending – FTT	In Progress
		Pend Case	Pended	In Progress
		Close Case	Completed	Resolved-Completed
		Add Comments	Open - Disenroll	In Progress
MARx Address Letter	Process Queue	MARx Address Completed	Pending - FTT	In Progress
		Pend Case	Pended	In Progress
		Close Case	Completed	Resolved- Completed
		Add Comments	MARx Address Letter	In Progress
Address Scrub	Process Queue	Address Scrub Completed	Pending - FTT	In Progress
		Pend Case	Pended	In Progress
		Close Case	Completed	Resolved- Completed
		Add Comments	Address Scrub	In Progress
Pending Audit	Process Queue	Peer Audit Completed	New SSC Case / MIIM Updated	In Progress
		Pend Case	Pended	In Progress
		Close Case	Completed	Resolved- Completed
		Add Comments	SSC - Pending Audit	In Progress

Current Queue	Queue Type	Action Taken	Next Queue	Next Status
Pended	Process Queue	<> Not available	<>	<>
Peer Audit Failed	Process Queue	Add Comments	Peer Audit Failed	In Progress
		Close Case	Completed	Resolved- Completed
		Pend Case	Pended	In Progress
		Send to Peer Audit	SSC - Pending Audit	In Progress
Pending FTT	Holding Queue	NA	NA	NA
Pending NOT	Holding Queue	NA	NA	NA
Pending SSC RPR	Holding Queue	NA	NA	NA
Submit to CMS	Holding Queue	NA	NA	NA
Update Sent to CMS	Holding Queue	NA	NA	NA
Completed	Completed Queue	NA	NA	NA
CMS Accepted	Completed Queue	NA	NA	NA

4.3.3.2 Before working on the SSC Process Work form

Before you work on the SSC Process Work form, you must familiarize yourself with related interfaces and forms that trigger to the form.

4.3.3.2.1 SSC Queue Summary

This page provides detailed list of various SSC queues. For more information accessing SSC Queue Summary form, refer to the Types of queues section.

Figure 4-91: The SSC Queue Summary Page

Field Name	Description	
Start Date	Enter the start date of the case.	
End Date	Enter the end date of the cases.	
View button	Click this button to view the queue created in between these dates.	
Processing Queues	**Count**	**Action**
New Case	Displays the count	Displays the action icons a user can take. User can edit queue, view the queue, and view the report.
MIIM Updated		
Open-NOT		
Open - Disenroll		

Field Name	Description	
MARx Address Letter		
Address Scrub		
Received TRC 282		
Pending Audit		
Peer Audit Failed		
Pended		
Holding Queues	**Count**	**Action**
Pending FTT	Displays the count	Displays the action icons a user can take. User can edit queue, view the queue, and view the report.
Pending NOT		
Pending SSC RPR		
Submit to CMS		
Update Sent to CMS		
Completed Queues	**Count**	**Action**
Completed	Displays the count	Displays the action icons a user can take. User can edit queue, view the queue, and view the report.
CMS Accepted		

4.3.3.2.2 Viewing cases from queues

You can access the form through the queues by clicking the Get Queue icon in the Actions column of the SSC Case Summary page. The Work Item - SSC form appears.

For more information, refer to the Before working on the OOA Process Work form section.

4.3.3.3 SSC Process Work form

The SSC Process Work page has multiple sections such as Work Case, Action, and Workflow Log. This Work Case section of the form contains multiple tabs such as Case Details, Discrepancy Data, CMS Transaction Details, Address Validation - USPS, One Stop Shop, TRR Data, Reference Cases, Comments, and Attachment section.

The following section discusses details about the workflow involved in the new cases. All the associated actions, next queues, next statuses are described in the SSC Queues and Actions section.

To work on the cases in the SSC queues, you have to access the SSC Process Work form.

***Note**: All the fields marked with asterisk in the form are mandatory fields.*

Navigation:

To access the **SSC Process Work** form:

1. Go to **Application** menu, point to **OST>SSC** and click the **Get Queue** link.

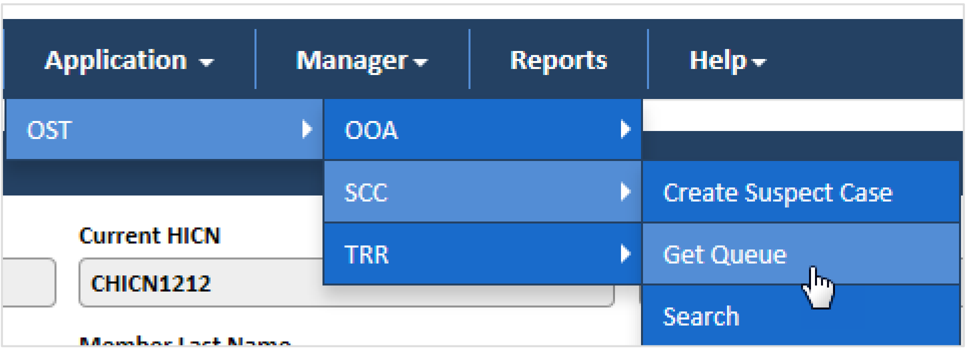


Figure 4-92: Accessing SSC Queue Summary Page

The **SSC Queue Summary** page appears.

2. Click the get queue icon under the **Action** column in the **SSC Queue Summary** form.

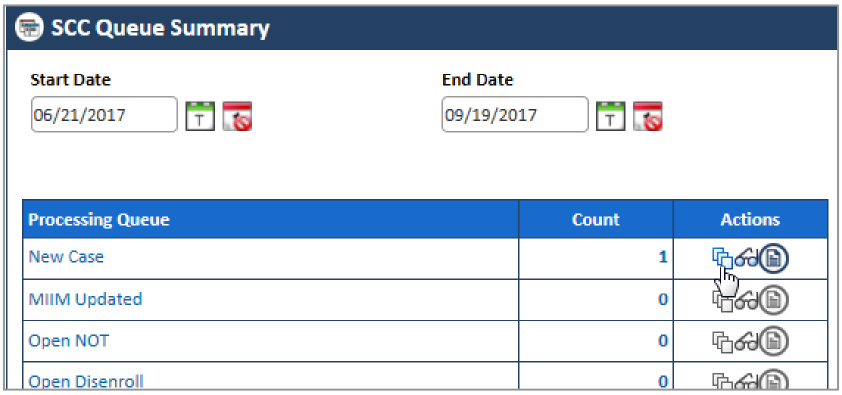


Figure 4-93: The SSC Queue Summary page

The **Work Item – SSC** page appears.

3. Click the **Start Processing** button open the **SSC Process Work** form.

Figure 4-94: The Work Item—SSC section

4. Click the **Get Next** to open the next work item.
5. Click **Cancel** to cancel the process of opening the queues.

The SSC Process Work form

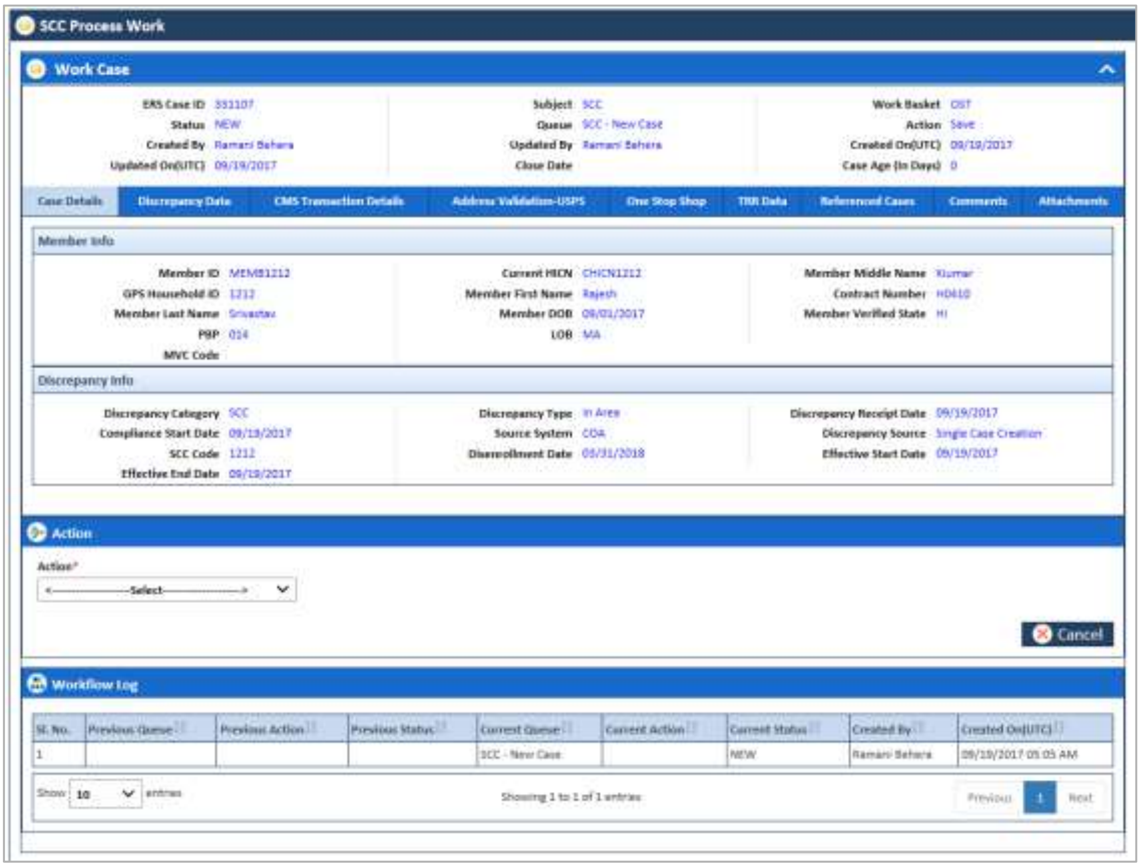


Figure 4-95: The SSC Process Work form

4.3.3.4 Work Case Section> Header

All the fields are available in the read-only mode. For more information on header section, refer to the header section of the **OOA Process Work** form in the Work Case Section> Header section.

Figure 4-96: Work Case Section> Header Section

4.3.3.5 Work Case Section> Case Details Tab

The values are populated from the **Create SSC Case** form while creating the new SSC case.

Figure 4-97: Work Case Section> Case Details Tab

This section provides the details about the case. The Case Details section of the **OOA Process Work** form is very similar to the **SSC Process Work** form. Additionally, the **SSC Process Work** form contains the **Effective Start Date** and **Effective End Date** fields.

For more information on the field values, refer to the Work Case Section> CMS Transaction Details Tab section.

4.3.3.6 Work Case Section> Discrepancy Data Tab

For more information on the field values, refer to the Work Case Section> Discrepancy Data Tab section.

4.3.3.7 Work Case Section> CMS Transaction Details Tab

For more information on the field values, refer to the Work Case Section> CMS Transaction Details Tab section.

4.3.3.8 Work Case Section> Address Validation –USPS

For more information on the field values, refer to the Work Case Section> Address Validation-USPS tab section.

4.3.3.9 Work Case Section> One Stop Shop Tab

For more information on the field values, refer to the Work Case Section> One Stop Shop Tab section.

4.3.3.10 Work Case Section> Reference Cases Tab

For more information on the field values, refer to the Work Case Section> Reference Cases Tab section.

4.3.3.11 Work Case Section> Comments Tab

For more information on the field values, refer to the Work Case Section> Comments Tab section.

4.3.3.12 SSC Process Work> Action Section

Based on the work basket select while login or module you access, the action values changes in the respective queues forms.

For more information on various action values in the TRR queue, refer to SSC Queues and Actions section.

Action Values

Action Values	Description
Add Comments	Select this action value to add your comments about the case while working on the queue. The status of the queue becomes In Progress and the queue is routed to the Processing Queue as New SSC Queue after you add the comments and click the Save button.
Close Case	Select this action value to close the case. If you select this option, two fields Resolution and Reason appear. The queue is routed to the Completed Queues list as Completed queue with the status Resolved – Completed if you click the Save button.
Pend Case	Select this value to make the case pending for more research on the case. The queue is routed to the **Processing Queues** list as Pended queue with the status In Progress if you click the Save button.
SSC RPR Request	Select this value to create RPR cased request from SSC case.
Send OOA Letter	Select this value to send the OOA letter to the member. The queue is routed to the Holding Queues list as Pending – Not queue with the status In Progress if you click the Save button.
Send SSC Letter	Select this value to send the SSC letter member. The queue is routed to the Completed Queues if you click the Save button.
Send SCC Update to CMS	Select value to send the SSC update to CMS. The queue is routed to the Holding Queues list as Submit to CMS queue with the status In Progress if you click the Save button. If you select this action value and save the form, a warning message '**Do you want for CMS Update?**'' appears.
Send to Peer Audit	Select this value to send the case for peer audit. The queue is routed to the Holding Queues list as **Submit to CMS** queue with the status **In Progress** if you click the Save button.
Update GPS	Select this value to update the GPS details. The case gets closed and queue routed tot Completed queue.
Peer Audit completed (Appears in the **OOA - Pending Audit** Queue form)	Select this value to show if the peer audit is completed or not.
Address Scrub Completed (Appears in the **OOA - Address Scrub** Queue form)	Select this value if the address scrub is completed.
MARx Address Completed (Appears in the **MARx Address Letter** Queue form)	To be updated.
Residential Doc Required/County Attestation Required	To be updated.
Extend Tracking (Appears in the **Open - Disenroll** Queue form)	To be updated.
Send Notification of	To be updated.

Action Values	Description
Termination Letter	

Associated fields in the Action section

The following table shows the fields those appear based on selection of certain value in the Action field of the queue form. This table also displays some fields which appears based on selection certain values in the fields which appears after selection of the certain values in the Action field.

Associated Fields	Appears when…	Description
Comments	You select the value Add Comments, Close Case, Pend Case, Send OOA Letter, Send SCC Update to CMS, and Send to Peer Audit the **Action** field.	Enter your comments about the action you selected while working on the queue. The comments you enter will appears in the next work flow.
Resolution	You select the value **Close Case** in the **Action** field.	Select the appropriate resolution from the list for which you are closing the case. The following value are available in this field: • Added to SCC RPR SharePoint • Attested No Incarceration • Auto Enrolled • False Discrepancy • IA • Member Response OOA Term • NO Response FT Term • OOA Term - Incarceration • Termed
Pend Reason	You select the value **Pend Case** in the Action field.	Select the appropriate reason for making the case a pend case.
First Letter Mail Date	You select the value **Send OOA Letter** in the **Action** field. You select the value **IA** in the **Resolution** field.	Enter the date when the first mail intimations letter was sent to the members.
Last Name	You select the value **Send SCC Update to CMS** in the Action field.	Enter the last name of the member.
Date of Birth	You select the value **Send SCC Update** to CMS in the **Action** field.	Enter the date of the birth of the member.
PBP	You select the value **Send SCC Update** to CMS in the Action field.	Select the PBP.
Contract Number	You select the value **Send SCC Update** to CMS in the **Action** field.	Select the contract number.
Application Date	You select the value **Send SCC Update** to CMS in the **Action** field.	Enter the application date of the case.
Effective Date	You select the value **Send SCC Update** to CMS in the **Action** field.	Enter the effective date of the case.
End Date	You select the value **Send SCC Update** to CMS in the Action field.	Enter the end date of the case.
Initial Address Verification Date	You select the value **Member Response OOA Term** in the **Resolution** field.	Enter the date when the address of the member verified first.
Member Response	You select the value **Member Response OOA Term** in the	Enter the date when the member response

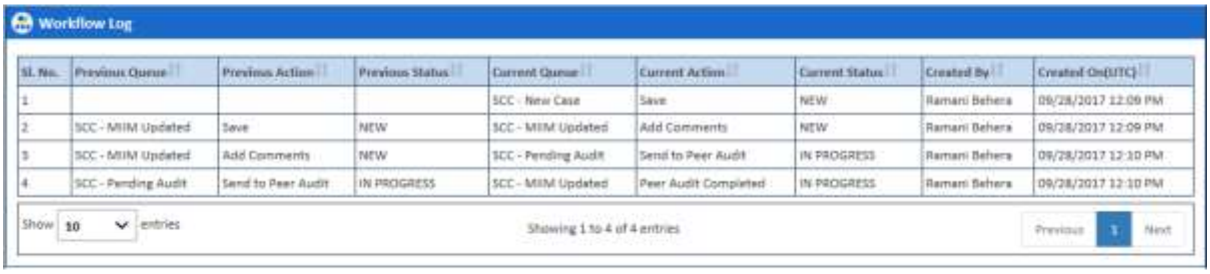
Associated Fields	Appears when…	Description
Verification Date	**Resolution** field.	was verified first.
Member Verified State	You select the value **Member Response OOA Term** in the **Resolution** field.	Enter name the state to which the verified member belongs to.
Second Letter Mail Date	You select the value **No Response FT Term** in the **Resolution** field	Enter the date when the second mail intimations letter was sent to the members
Contains Error	You select the value **Peer Audit Completed** in the **Resolution** field	If you select the value no in this field, then the No, then the case routes to New case. If you select the value Yes, the peer audit gets completed.

Action buttons

For more information on command buttons, refer to the Important Commands section.

4.3.3.13 SSC Process Work >Workflow Log Section

The workflow log provides the details about various cases such as their current and previous statuses and queues, date on when it was created and the associated roles.



Workflow Log

Sl. No.	Previous Queue	Previous Action	Previous Status	Current Queue	Current Action	Current Status	Created By	Created On(UTC)
1				SCC - New Case	Save	NEW	Ramani Behera	09/28/2017 12:09 PM
2	SCC - MIIM Updated	Save	NEW	SCC - MIIM Updated	Add Comments	NEW	Ramani Behera	09/28/2017 12:09 PM
3	SCC - MIIM Updated	Add Comments	NEW	SCC - Pending Audit	Send to Peer Audit	IN PROGRESS	Ramani Behera	09/28/2017 12:10 PM
4	SCC - Pending Audit	Send to Peer Audit	IN PROGRESS	SCC - MIIM Updated	Peer Audit Completed	IN PROGRESS	Ramani Behera	09/28/2017 12:10 PM

Show 10 entries Showing 1 to 4 of 4 entries Previous 1 Next

Figure 4-98: SSC Process Work Form> Workflow Log Section

Columns Name	Description
Sl. No.	Displays the serial numbers of the cases in the table.
Previous Queue	Displays the name of the previous queue of the case.
Previous Action	Displays the previous action taken for this case.
Previous Status	Displays the name of the previous status of the case.
Current Queue	Displays the name of the current queue of the case.
Current Action	Displays the current action taken for this case.
Current Status	Displays the name of the previous current of the case.
Created By	Displays the name of the role that created case.
Created On(UTC)	Displays the date when the case was created.

4.3.4 Searching SSC Queues

The searching queue process is same for all the queues. For more information how to search the SSC queues, refer to the Searching OOA Cases section.

4.3.5 Working on TRR Queues

With appropriate access rights, you can access the TRR queues from the TRR Queue Summary page and work on the TRR Process Work form. You can select from multiple queues to retrieve the next new work item in a TRR queue directly from the application.

Based on the TRR record age, TRR queue records are presented in the application. The age of the record is decided by differentiating the current date from the Compliance Start Date.

4.3.5.1 TRR Queues and Actions

The below table provides the details of the TRR Queues, action values in respective queues. This also provides the list of next queues and next statuses.

Current Queue	Queue Type	Action Taken	Next Queue	Next Status
TRR Queues This section provides the details of all the TRR queues, their associated actions values in the Action fields, next queues of the current queues and the next statuses.				
CMS Rejected	Processing Queue	Send SCC Update to CMS	Submit to CMS	In Progress
		Close & Mailing Address Not Verified	Completed	Resolved- Completed
		Update GPS	Completed	Resolved- Completed
		Send SCC Update to CMS	Submit to CMS	In Progress
		SCC RPR Request	Pending - SCC RPR	In Progress
		Pend Case	TRR - Pended	In Progress
		Send to Peer Audit	TRC - Pending Audit	In Progress
		Close Case	Completed	Resolved- Completed
		Add Comments	CMS Rejected	In Progress
		Send OOA Letter	Pending - NOT	In Progress
CMS Rejected Deletion Code	Processing Queue			
TRC 154:76	Processing Queue			
TRC 155	Processing Queue	Extend Tracking	Pending – FTT	In Progress
		Pend Case	Pended	In Progress
		Close Case	Completed	Resolved-Completed
		Add Comments	Open - Disenroll	In Progress
TRC 282	Processing Queue	MARx Address Completed	Pending - FTT	In Progress
		Pend Case	Pended	In Progress
		Close Case	Completed	Resolved- Completed
		Add Comments	MARx Address Letter	In Progress
Fallout TRC 155	Processing Queue	Address Scrub Completed	Pending - FTT	In Progress
		Pend Case	Pended	In Progress
		Close Case	Completed	Resolved- Completed
		Add Comments	Address Scrub	In Progress
TRR - Open NOT	Processing Queue	Peer Audit Completed	New SSC Case / MIIM Updated	In Progress
		Pend Case	Pended	In Progress
		Close Case	Completed	Resolved- Completed
		Add Comments	SSC - Pending Audit	In Progress

Current Queue	Queue Type	Action Taken	Next Queue	Next Status
TRR - Open Disenroll	Processing Queue	<> Not available	<>	<>
TRR - MARx Address Letter	Processing Queue	Add Comments	Peer Audit Failed	In Progress
		Close Case	Completed	Resolved- Completed
		Pend Case	Pended	In Progress
		Send to Peer Audit	SSC - Pending Audit	In Progress
TRR - Address Scrub	Processing Queue	NA	NA	NA
Escalated	Processing Queue	NA	NA	NA
Pending Audit	Processing Queue	NA	NA	NA
Peer Audit Failed	Processing Queue	NA	NA	NA
Pended	Processing Queue	NA	NA	NA
TRR - Pending FTT	Holding Queues	NA	NA	NA
TRR - Pending NOT	Holding Queues	NA	NA	NA
Submit to CMS	Holding Queues			
Submit to CMS Deletion Code	Holding Queues			
Pending SCC RPR	Holding Queues			
Update Sent to CMS	Holding Queues			
Update Sent to CMS Deletion Code	Holding Queues			
Completed	Holding Queues			
CMS Accepted	Holding Queues			
CMS Accepted Deletion Code	Holding Queues			

4.3.5.2 Before working on the TRR Process Work form

Before you work on the TRR Process Work form, you must familiarize yourself with related interfaces and forms that trigger to the form.

4.3.5.2.1 SSC Queue Summary

This page provides detailed list of various TRR queues. For more information accessing TRR Queue Summary form, refer to the Types of queues section.

Figure 4-99: The TRR Queue Summary Page

Field Name	Description	
Start Date	Enter the start date of the case.	
End Date	Enter the end date of the cases.	
View button	Click this button to view the queue created in between these dates.	
Processing Queues	**Count**	**Action**
New Case	Displays the count	Displays the action icons a user can take. User can edit queue, view the queue, and view the report.
MIIM Updated		
Open-NOT		
Open - Disenroll		
MARx Address Letter		
Address Scrub		
Received TRC 282		
Pending Audit		
Peer Audit Failed		
Pended		
Holding Queues	**Count**	**Action**
Pending FTT	Displays the count	Displays the action icons a user can take. User can edit queue, view the queue, and view the report.
Pending NOT		
Pending SSC RPR		
Submit to CMS		
Update Sent to CMS		
Completed Queues	**Count**	**Action**
Completed	Displays the count	Displays the action icons a user can take. User can edit queue, view the queue, and view the report.
CMS Accepted		

4.3.5.2.2 Viewing cases from queues

You access the form through the queues by clicking the Get Queue icon in the Actions column of the TRR Case Summary page. The Work Item - TRR form appears.

For more information, refer to the Before working on the OOA Process Work form section.

4.3.5.3 TRR Process Work form

The TRR Process Work page has multiple sections such as Work Case, Action, and Workflow Log. This Work Case section of the form contains multiple tabs such as Case Details, Discrepancy Data, CMS Transaction Details, Address Validation - USPS, One Stop Shop, TRR Data, Reference Cases, Comments, and Attachment section.

The following section discusses details about the workflow involved in the new cases. All the associated actions, next queues, next statuses are described in the SSC Queues and Actions section.

To work on the cases in the TRR queues, you have to access the **TRR Process Work** form.

***Note**: All the fields marked with asterisk in the form are mandatory fields.*

Navigation:

To access the **TRR Process Work** form:

1. Go to Application menu, point to OST>TRR and click the Get Queue link.

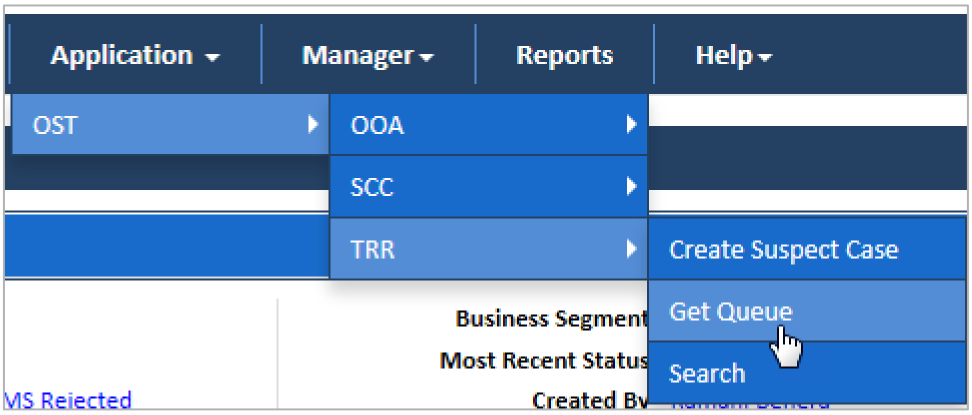


Figure 4-100: Accessing TRR Get Queue Link

The **TRR Queue Summary** page appears.

2. Click the get queue icon under the **Action** column in the **TRR Queue Summary** form.

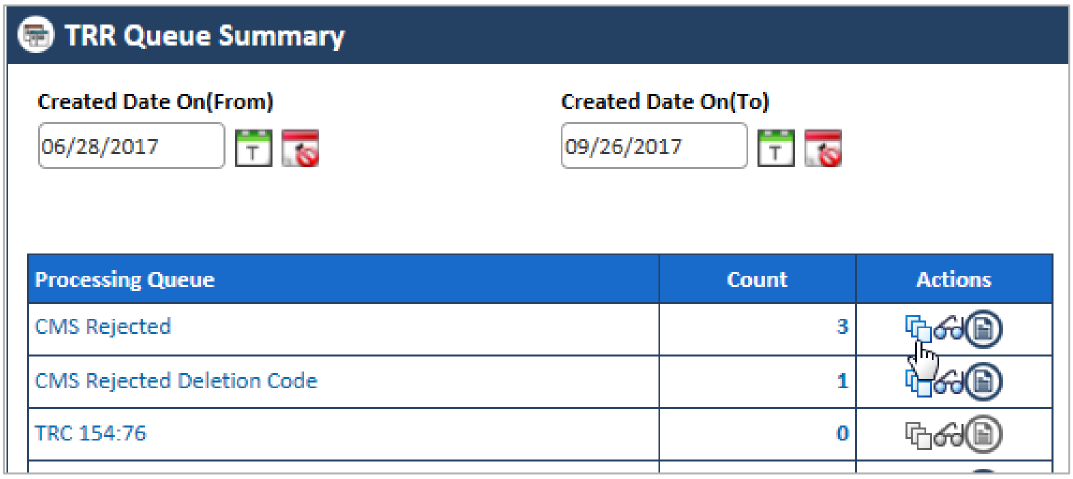


Figure 4-101: The TRR Queue Summary page

The **Work Item – TRR** page appears.

3. Click the **Start Processing** button access the **TRR Process Work** form.

Figure 4-102: The Work Item—TRR section

4. Click the **Get Next** to open the next work item.

Figure 4-103: The Next TRR Work Item

5. Click **Cancel** to cancel the process of opening the queues.

Figure 4-104:

The TRR Process Work form

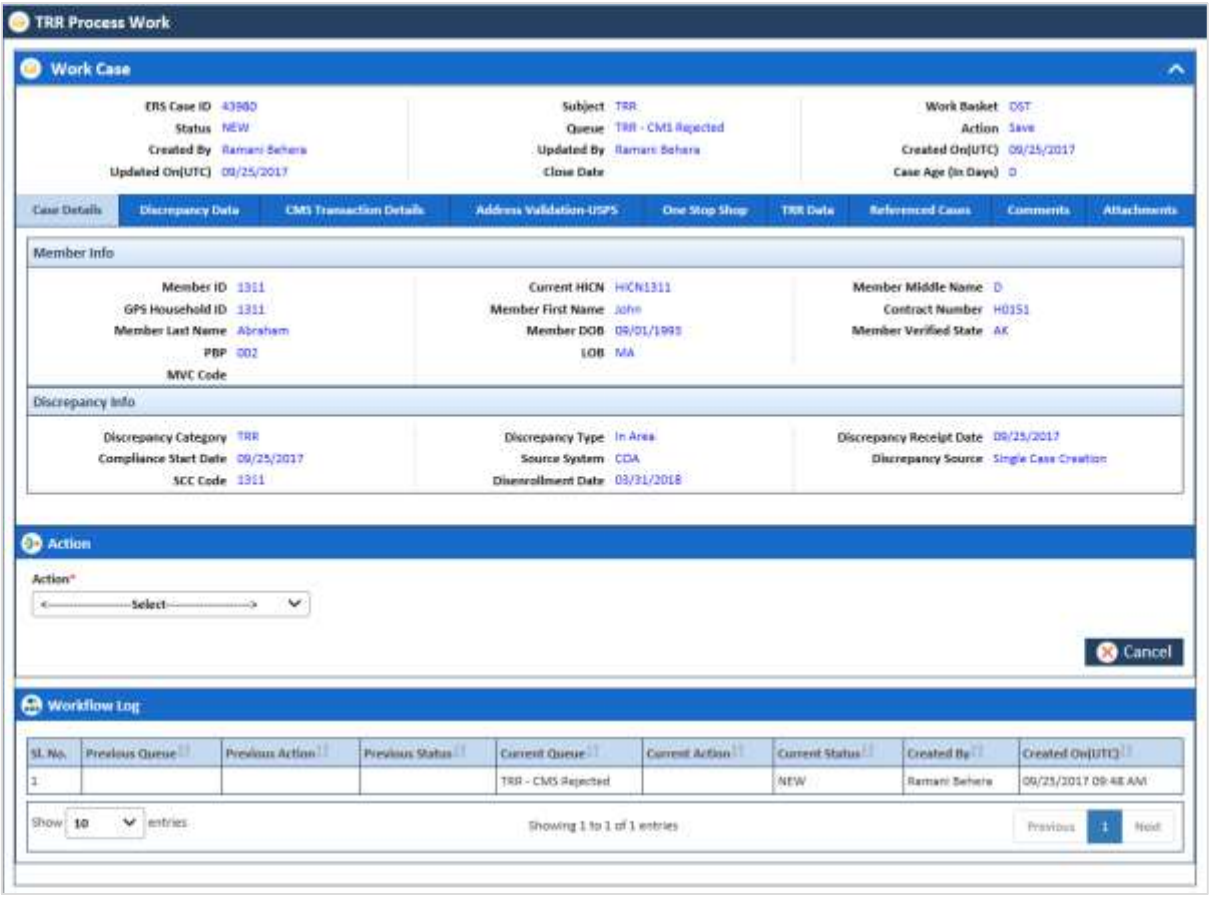


Figure 4-105: The TRR Process Work form

4.3.5.4 Work Case Section> Header

All the fields are available in the read-only mode. For more information on header section, refer to the header section of the **OOA Process Work** form in the Work Case Section> Header section.

Figure 4-106: Work Case Section> Header Section

4.3.5.5 Work Case Section> Case Details Tab

The values are populated from the **Create TRR Case** form while creating the new TRR case.

Figure 4-107: Work Case Section> Case Details Tab

This section provides the details about the case. The **Case Details** section of the TRR Process Work form is very similar to the **OOA Process Work** form.

For more information on the field values, refer to the Work Case Section> Case Details Tab section.

4.3.5.6 Work Case Section> Discrepancy Data Tab

This section provides the details about the discrepancy data. The Discrepancy Data section of the TRR Process Work form is very similar to the Discrepancy Data section of the OOA Process Work form. This tab doesn't contain the Individual Id field.

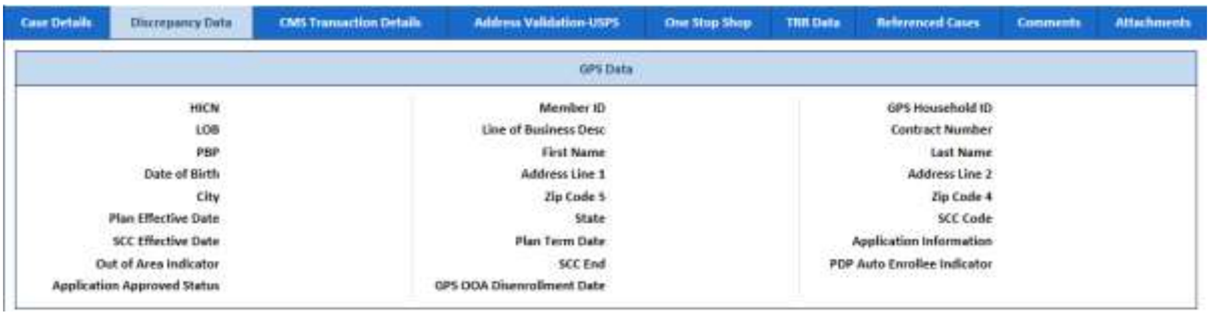


Figure 4-108: The TRR Process Form>Discrepancy Data tab

For more information on the field values, refer to the Work Case Section> Discrepancy Data Tab section.

4.3.5.7 Work Case Section> CMS Transaction Details Tab

The CMS Transaction Details Tab section of the TRR Process Work form is very similar to the CMS Transaction Details Tab section of the OOA Process Work form.

Figure 4-109: Work Case Section> CMS Transaction Details Tab

For more information on the field values, refer to the Work Case Section> CMS Transaction Details Tab section.

4.3.5.8 Work Case Section> Address Validation – USPS Tab

The Address Validation – USPS section of the TRR Process Work form is very similar to the Address Validation – USPS section of the OOA Process Work form.

Figure 4-110: Work Case Section> Address Validation – USPS

For more information on the field values, refer to the Work Case Section> Address Validation-USPS tab section.

4.3.5.9 Work Case Section> One Stop Shop Tab

The **One Stop Shop** Tab section of the **TRR Process Work** form is very similar to the One Stop Shop Tab section of the OOA Process Work form.

Figure 4-111: Work Case Section> One Stop Shop Tab

For more information on the field values, refer to the Work Case Section> One Stop Shop Tab section.

4.3.5.10 Work Case Section> TRR Data Tab

The TRR Data Tab section of the **TRR Process Work** form is very similar to the **TRR Data Tab** section of the **OOA Process Work** form.

For more information on the field values, refer to the Work Case Section> TRR Data Tab section.

4.3.5.11 Work Case Section> Reference Cases Tab

The Reference Cases Tab section of the **TRR Process Work** form is very similar to the **Reference Cases Tab** section of the **OOA Process Work** form.

For more information on the field values, refer to the Work Case Section> Reference Cases Tab section.

4.3.5.12 Work Case Section> Comments Tab

For more information on the field values, refer to the Work Case Section> Comments Tab section.

4.3.5.13 SSC Process Work> Action Section

Based on the work basket select while login or module you access, the action values changes in the respective queues forms.

For more information on various action values in the OOA queue, refer to SSC Queues and Actions section.

Action Values

Action Values	Description
Add Comments	Select this action value to add your comments about the case while working on the queue. The status of the queue becomes In Progress and the queue is routed to the Processing Queue as New SSC Queue after you add the comments and click the Save button.
Close & Mailing	

Action Values	Description
Address Not Verified	
Close Case	Select this action value to close the case. If you select this option, two fields Resolution and Reason appear. The queue is routed to the Completed Queues list as Completed queue with the status Resolved – Completed if you click the Save button.
Pend Case	Select this value to make the case pending for more research on the case. The queue is routed to the **Processing Queues** list as Pended queue with the status In Progress if you click the Save button.
SSC RPR Request	Select this value to create RPR cased request from SSC case. If you select this option, the SSC RPR Request section appears. For more information refer to the section.
Send OOA Letter	Select this value to send the OOA letter to the member. The queue is routed to the Holding Queues list as Pending – Not queue with the status In Progress if you click the Save button.
Send SCC Deletion to CMS	
Send SCC Update to CMS	Select value to send the SSC update to CMS. The queue is routed to the Holding Queues list as Submit to CMS queue with the status In Progress if you click the Save button. If you select this action value and save the form, a warning message '**Do you want for CMS Update?**'' appears.
Send to Peer Audit	Select this value to send the case for peer audit. The queue is routed to the Holding Queues list as **Submit to CMS** queue with the status **In Progress** if you click the Save button.
Update GPS	Select this value to update the GPS details. The case gets closed and queue routed tot Completed queue.
Peer Audit completed (Appears in the **OOA - Pending Audit** Queue form)	Select this value to show if the peer audit is completed or not.
Address Scrub Completed (Appears in the **OOA - Address Scrub** Queue form)	Select this value if the address scrub is completed.
MARx Address Completed (Appears in the **MARx Address Letter** Queue form)	To be updated.
Residential Doc Required/County Attestation Required	To be updated.
Extend Tracking (Appears in the **Open - Disenroll** Queue form)	To be updated.
Send Notification of Termination Letter	To be updated.

Associated fields in the Action section

The following table shows the fields those appear based on selection of certain value in the Action field of the queue form. This table also displays some fields which appears based on selection certain values in the fields which appears after selection of the certain values in the Action field.

Associated Fields	Appears when…	Description
Comments	Appears if you select any value in the Action field.	Enter your comments about the action you selected while working on the queue. The comments you enter will appears in the next work flow.
Resolution	You select the value **Close Case** in the **Action** field.	Select the appropriate resolution from the list for which you are closing the case. The following value are available in this field: • Added to SCC RPR SharePoint • Attested No Incarceration • Auto Enrolled • False Discrepancy • IA • Member Response OOA Term • NO Response FT Term • OOA Term - Incarceration • Termed
Pend Reason	You select the value **Pend Case** in the Action field.	Select the appropriate reason for making the case a pend case.
First Letter Mail Date (appears if you select the value **Send OOA Letter** in **Action** field)	You select the value **Send OOA Letter** in the **Action** field. The **First Letter Mail Date** field also appears if you select the value **IA, and First Letter Mail Date** in the **Resolution** field.	Enter the date when the first mail intimations letter was sent to the members.
Last Name	You select the value **Send SCC Update to CMS** in the Action field.	Enter the last name of the member.
Date of Birth	You select the value **Send SCC Update** to CMS in the **Action** field.	Enter the date of the birth of the member.
PBP	You select the value **Send SCC Update** to CMS in the Action field.	Select the PBP.
Contract Number	You select the value **Send SCC Update** to CMS in the **Action** field.	Select the contract number.
Application Date	You select the value **Send SCC Update** to CMS in the **Action** field.	Enter the application date of the case.
Effective Date	You select the value **Send SCC Update** to CMS in the **Action** field.	Enter the effective date of the case.
End Date	You select the value **Send SCC Update** to CMS in the Action field.	Enter the end date of the case.
You select the value **Send SCC Update** to CMS in the Action field.		The value for the transaction code appears.
Initial Address Verification Date	You select the value **Member Response OOA Term** in the **Resolution** field.	Enter the date when the address of the member verified first.
Member Response Verification Date	You select the value **Member Response OOA Term** in the **Resolution** field.	Enter the date when the member response was verified first.
Member Verified State	You select the value **Member Response OOA Term** in the **Resolution** field.	Enter name the state to which the verified member belongs to.
Second Letter Mail Date	You select the value **No Response FT Term** in the **Resolution** field	Enter the date when the second mail intimations letter was sent to the members

The following screenshot provides more information about the **Action** field and related fields.

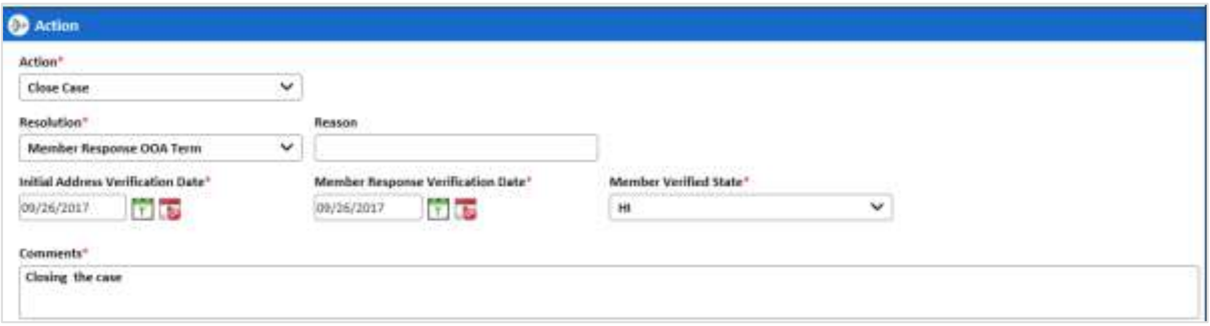


Figure 4-112: The Action field>Close Case

Figure 4-113: The Action field>Send SSC Updates to CMS

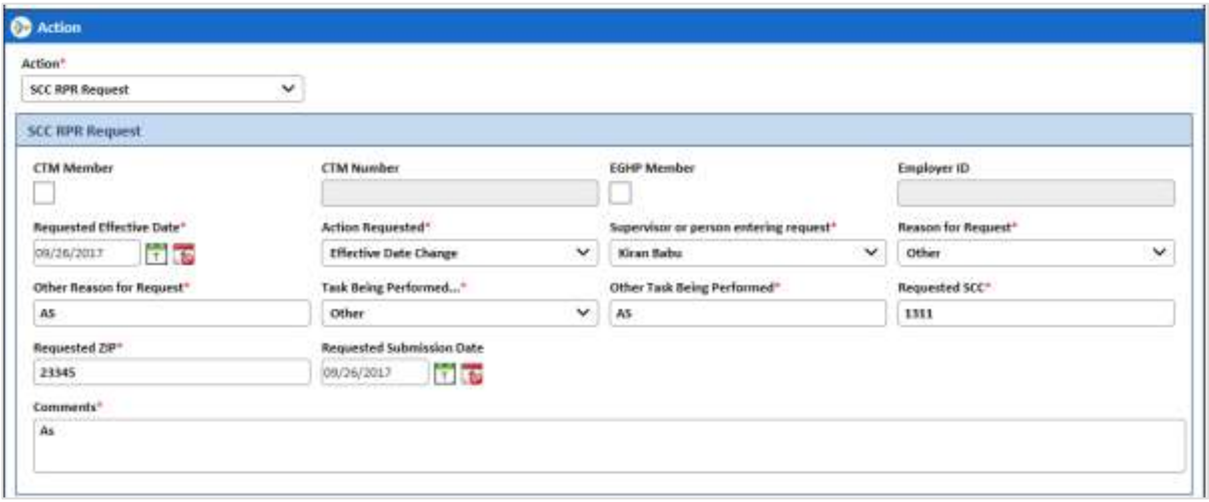


Figure 4-114: The Action field>SSC RPR Request.

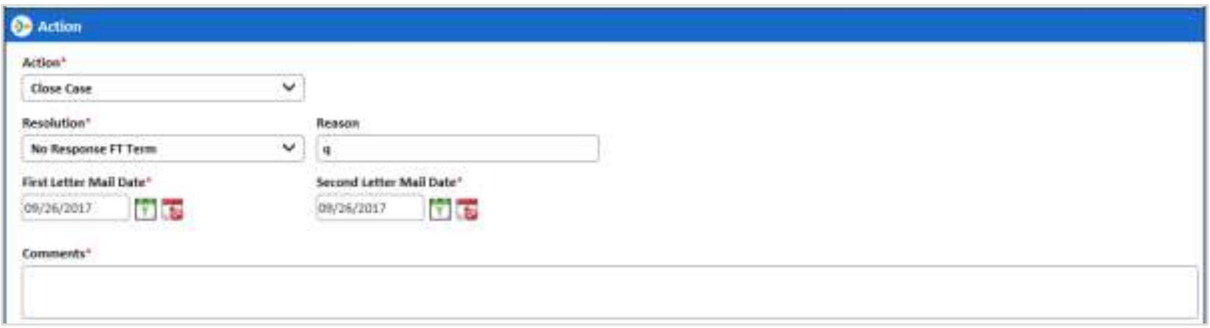


Figure 4-115: The Action field>Send SSC Updates to CMS

Action buttons

For more information on command buttons, refer to the Important Commands section.

4.3.5.14 TRR Process Work >Workflow Log Section

The workflow log provides the details about various cases such as their current and previous statuses and queues, date on when it was created and the associated roles.

Figure 4-116: Workflow Log Section

Columns Name	Description
Sl. No.	Displays the serial numbers of the cases in the table.
Previous Queue	Displays the name of the previous queue of the case.
Previous Action	Displays the previous action taken on the case.
Previous Status	Displays the name of the previous status of the case.
Current Queue	Displays the name of the current queue of the case.
Current Action	Displays the current action taken on the case.
Current Status	Displays the name of the previous current of the case.
Created By	Displays the name of the role that created case.
Created On	Displays the date when the case was created.

4.3.6 Searching TRR Queues

The searching queue process is same for all the queues. For more information how to search the SSC queues, refer to the Searching OOA Cases section.

4.4 RPR Queues

RPR queues help you access and work on the RPR cases for further processing. These queues have the following sections and tabs in the queue form. The queue case form has the following sections and tabs.

- Header section
- Case Details tab
- Discrepancy Data tab
- CMS Transaction Details tab
- Address Verification – USPS tab
- One Stop Shop tab
- Referenced cases tab
- Comments tab
- Attachments tab
- Action section
- Workflow Log section

4.4.1 Working on RPR Queues

With appropriate access rights, you can access the RPR queues from the **RPR Queue Summary** page and work on the **RPR Process Work** form. You can select from multiple queues to retrieve the next new work item in an RPR queue directly from the application.

Based on the RPR record age, RPR queue records are presented in the application. The age of the record is decided by differentiating the current date from the **Compliance Start Date**.

4.4.1.1 RPR Queues and Actions

The below table provides the details of the RPR Queues, and action values in respective queues. This also provides the list of next queues and next statuses.

Current Queue	Queue Type	Action Taken	Next Queue	Next Status
RPR Queues This section provides the details of all the RPR queues, their associated actions values in the Action fields, next queues of the current queues and the next statuses.				
RPC Request Category 2	Process Queue	Send to Peer Audit	RPR - Peer Audit	In Progress
		Update Plan	Completed	Resolved-Completed
		Pend Case	RPR - Pended	In Progress
		Close Case	Completed	Resolved-Completed
		Add Comments	RPC Request - Category 2	New / In-progress
RPC Request Category 3	Process Queue	Send to Peer Audit	RPR - Peer Audit	In Progress
		Update Plan	Completed	Resolved-Completed
		Pend Case	RPR - Pended	In Progress
		Close Case	Completed	Resolved-Completed
		Add Comments	RPC Request - Category 3	New / In-progress
RPC Peer Audit Failed	Process Queue	Send to Peer Audit	RPR - Peer Audit	In Progress
		Update Plan	Completed	Resolved-Completed
		Pend Case	RPR - Pended	In-progress
		Close Case	Completed	Resolved-Completed
		Add Comments	RPC Peer Audit Failed	In-progress
RPC Peer Audit	Process Queue	Peer Audit Completed	RPC Request - Category 2/RPC Request - Category 3 / RPC Peer Audit Failed	In Progress
		Update Plan	Completed	Resolved-Completed
		Pend Case	RPR - Pended	In-progress
		Close Case	Completed	Resolved-Completed
		Add Comments	RPC Peer Audit	In-progress
RPR Submission Category 2	Process Queue	Submit RPC Request	Sent to RPC	In Progress
		Update Plan	Completed	Resolved-Completed
		Pend Case	RPR - Pended	In-progress
		Close Case	Completed	Resolved-Completed
		Add Comments	RPR Submission (Category 2)	In-progress
RPR Submission Category 3	Process Queue	Submit to Account Manager	CMS Account Manager Sent	In Progress
		Update Plan	Completed	Resolved- Completed
		Pend Case	RPR - Pended	In-progress
		Close Case	Completed	Resolved- Completed

Current Queue	Queue Type	Action Taken	Next Queue	Next Status
		Add Comments	RPR Submission (Category 3)	In-progress
CMS Account Manager Sent Category 3	Process Queue	Submit RPC Request	Sent to RPC	In Progress
		RPC Rejected	RPC Rejected	In Progress
		Update Plan	Completed	Resolved- Completed
		Pend Case	RPR - Pended	In progress
		Close Case	Completed	Resolved- Completed
		Add Comments	CMS Account Manager Sent (Category 3)	In progress
Received RPC FDR	Process Queue	RPC Rejected	RPC Rejected	RPC Rejected
		Update Plan	Completed	Completed
		Pend Case	RPR - Pended	RPR - Pended
		Close Case	Completed	Completed
		Add Comments	Received RPC FDR	Received RPC FDR
		FDR Approved	Completed	Completed
RPC Rejected	Process Queue	Transaction Inquiry Approved	RPC Re-Submission	In Progress
		Update Plan	Completed	Resolved- Completed
		Pend Case	RPR - Pended	In progress
		Close Case	Completed	Resolved- Completed
		Add Comments	RPC Rejected	In progress
Sent to RPC (FDR response Uploaded)	Process Queue	Update Plan	Completed	Resolved- Completed
		Pend Case	RPR - Pended	In progress
		Close Case	Completed	Resolved- Completed
		Add Comments	Sent to RPC (FDR response Uploaded)	In progress
			Received RPC FDR	In progress
Initial SCC RPR	Process Queue	SCC RPR Required/Send SCC Deletion to CMS	Submit to CMS (Deletion Code)	
		Pend Case	RPR - Pended	
		Add Comments	Initial SCC RPR	
		SCC RPR Not Required	Completed	
Received 282	Process Queue	Incorrect SCC Information	SCC RPR Submission	In Progress
		Pend Case	RPR - Pended	In Progress
		Add Comments	Received 282	In Progress
		SCC RPR Not Required	Completed	Resolved- Completed
SCC RPR Submission	Process Queue	Submit SCC RPC Request	SCC RPR Sent	In Progress
		Pend Case	RPR - Pended	In progress

Current Queue	Queue Type	Action Taken	Next Queue	Next Status
		Add Comments	SCC RPR Submission	In Progress
		SCC RPR Not Required	Completed	Resolved-Completed
SCC RPR Sent (FDR response Uploaded)	Process Queue	Pend Case	RPR - Pended	In progress
		Add Comments	SCC RPR Sent (FDR response Uploaded)	
		SCC RPR Not Required	Completed	Resolved-Completed
			SCC RPR FDR Received	In Progress
SCC RPR FDR Received	Process Queue	FDR Approved	Completed	Resolved-Completed
		Transaction Inquiry Required	SCC RPR Transaction Inquiry	In Progress
		Pend Case	RPR - Pended	In progress
		Add Comments	SCC RPR FDR Received	In Progress
		SCC RPR Not Required	Completed	Resolved-Completed
		Resubmit SCC RPC Request	SCC RPR Re-Submission	In Progress
		Sent SCC RPC Resubmission	SCC RPR Sent	In Progress
SCC RPR Transaction Inquiry	Process Queue	Transaction Inquiry Required	SCC RPR Transaction Inquiry	In Progress
		Submitted Transaction Inquiry	SCC RPR Transaction Inquiry	In Progress
		Pend Case	RPR - Pended	In progress
		Add Comments	SCC RPR Transaction Inquiry	In Progress
		SCC RPR Not Required	Completed	Resolved-Completed
Submit to CMS Deletion Code	Holding Queue	NA	NA	NA
Update sent to CMS Deletion Code	Holding Queue	NA	NA	NA
Completed	Completed Queue	NA	NA	NA

Navigation:

To access the **RPR Process Work** form:

1. Go to **Application** menu, point to **RPR** and click the **Get Queue** link.

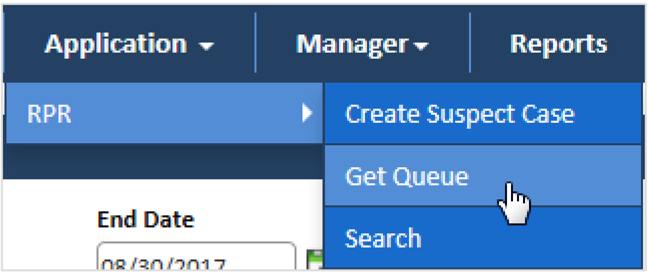


Figure 4-117: Accessing RPR Queue Summary Page

The **RPR Queue Summary** page appears.

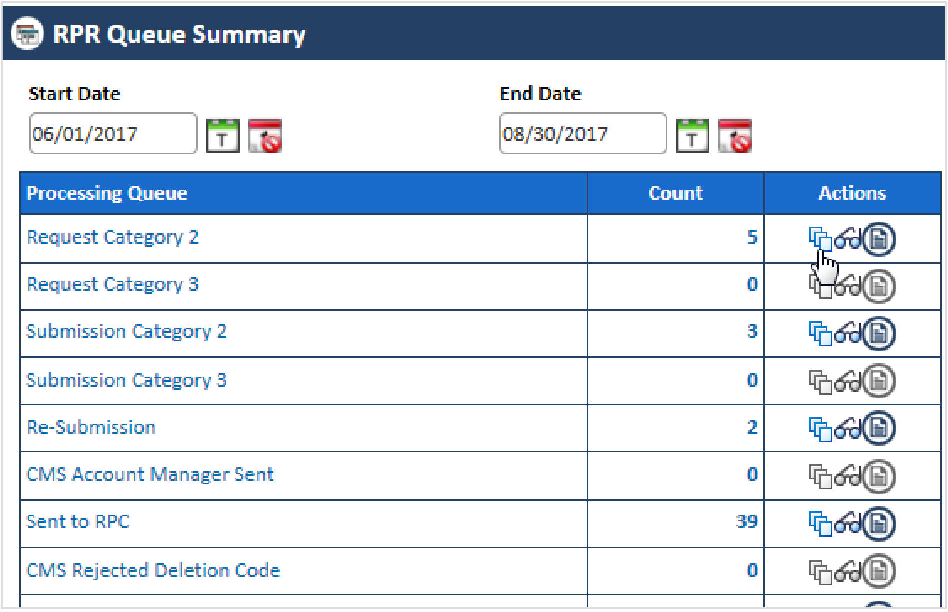


Figure 4-118: The RPR Queue Summary page

2. Click the **Get Queue** icon under the **Action** column in the **RPR Queue Summary** form.

The **Work Item – RPR** page appears.

Figure 4-119: The Work Item -- RPR section

3. Click the **Start Processing** button to open the form.

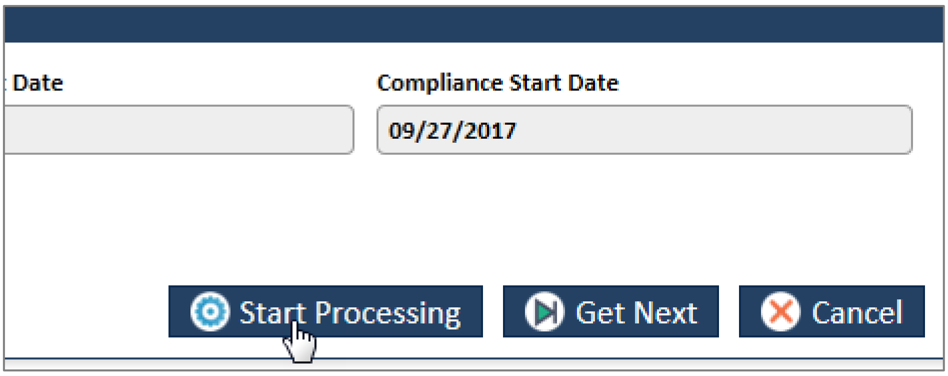


Figure 4-120: The Work Item- Start Processing button

4. Click the **Get Next** to open the next work item.

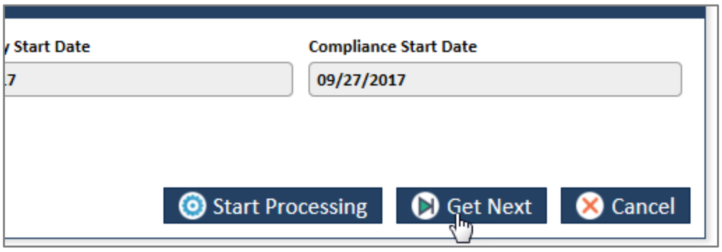
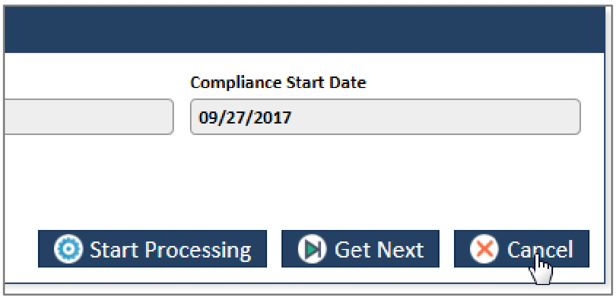


Figure 4-121: The Work Item – Get Next button



5. Click **Cancel** to cancel the process of opening the queues.

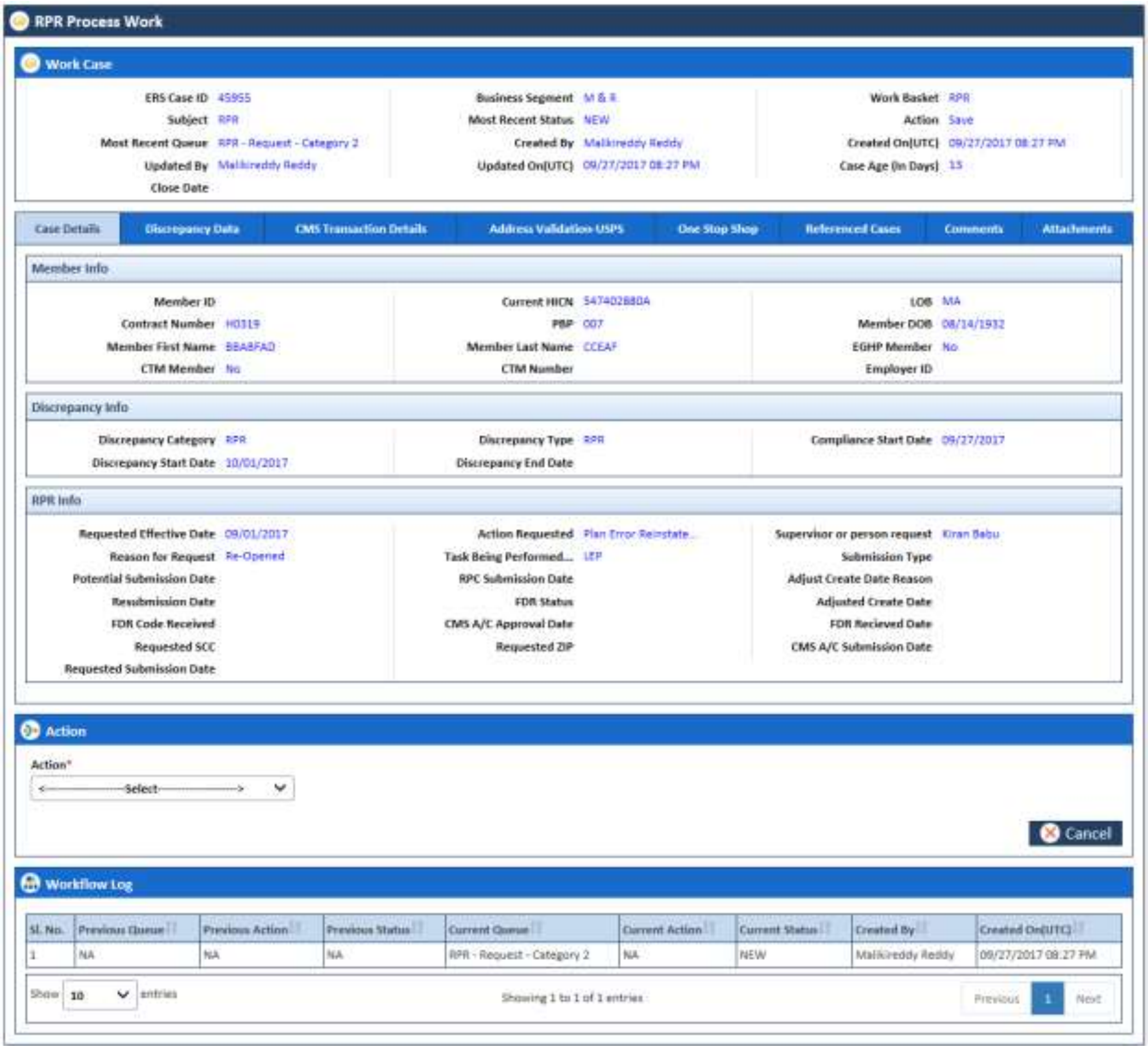


Figure 4-122: The Manage Case form

4.4.1.2 Before working on the Manage Case form

Before you work on the **RPR Process Work** form, you must familiarize yourself with related interfaces and forms that trigger to the form.

4.4.1.2.1 RPR Queue Summary Page

This page provides detailed list of various RPR queues. For more information on accessing **RPR Queue Summary** form, refer to the Types of queues section.

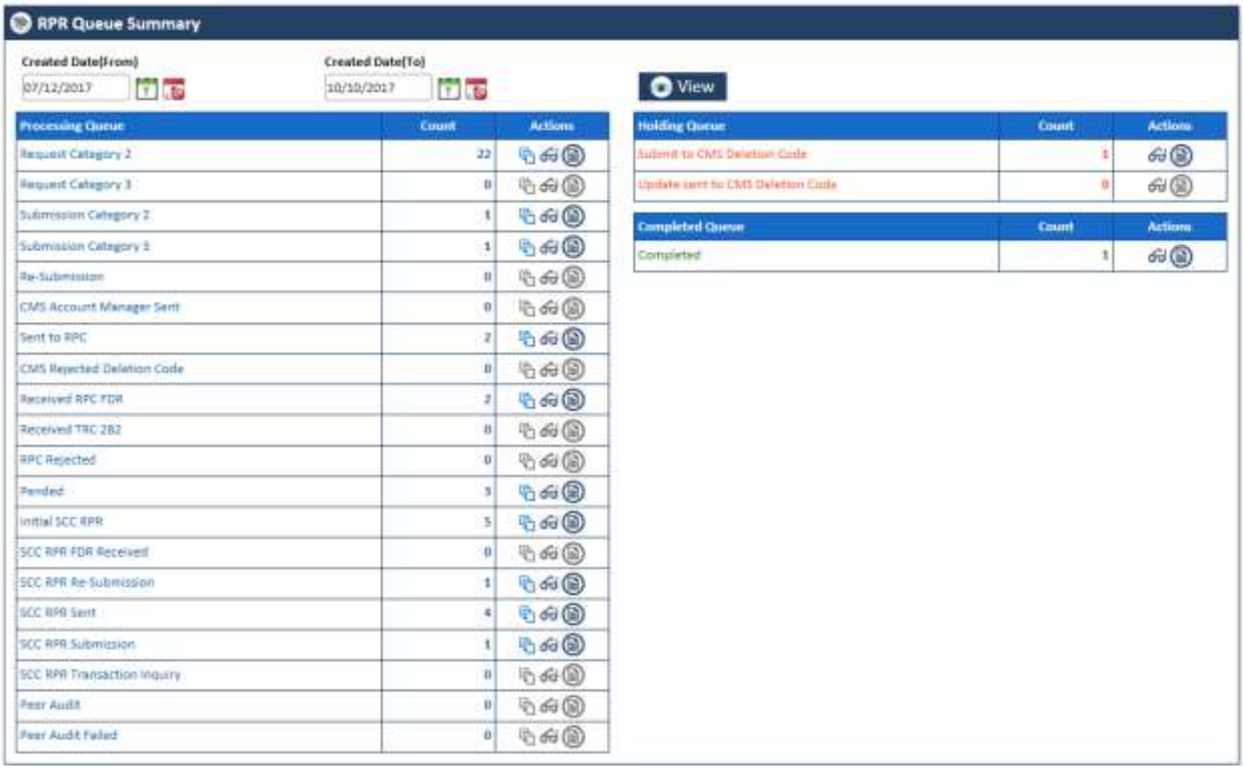


Figure 4-123: The RPR Queue Summary page

Field Name	**Description**	
Start Date	Enter the start date of the case.	
End Date	Enter the end date of the cases.	
View button	Click this button to view the queue created between these dates.	
Processing Queues Column	**Count** Column	**Actions** Column
Request Category 2	Displays the count	Displays the action icons which you can click to access respective forms report or details. User can edit queue, view the queue, and view the report.
Request Category 3		
Submission Category 2		
Submission Category 3		
Re-Submission		
CMS Account Manager Sent		
Sent to RPC		
CMS Rejected Deletion Code		
Received RPC FDR		
Received TRC		
RPC Rejected		
Pended		
Initial SCC RPR		
SCC RPR FDR Received		
SCC RPR Re-Submission		
SCC RPR Sent		
SCC RPR Submission		
SCC RPR Transaction Inquiry		
Pending Audit		

Field Name	Description	
Peer Audit Failed		
Processing Queues	**Count**	**Action**
Submit to CMS Deletion Code **Update sent to CMS Deletion Code**	Displays the count	Displays the action icons which you can click to access respective forms report or details. User cannot edit queue but can view the queue, and the report
Processing Queues	**Count**	**Action**
Completed	Displays the count	Displays the action icons which you can click to access respective forms report or details. User cannot edit queue but can view the queue, and the report.

4.4.1.2.2 Viewing cases from queues

You can access the form through the queues by clicking the **Get Queue** icon in the **Actions** column of the **RPR Queue Summary** page. The **Work Item - RPR** form appears.

If you are able to find the details of the queue you want access, you can click the **Start Processing** button. Or else, you can click the **Get Next** button until you find the queue details that you want to access.

Figure 4-124: The Work Item - RPR form

Field Name	Description
ERS Case ID	Displays ERS Case ID of the case that you want to access.
Current HICN	Displays Current HICN of the case that you want to access.
Discrepancy Start Date	Displays discrepancy start date of the case that you want to access.
Compliance Start Date	Displays compliance start date of the case that you want to access.
Member First Name	Displays member first name of the case that you want to access.
Member Last Name	Displays member last name of the case that you want to access.
Start Processing button	Click this button to access the case that you want to work on.
Get Next button	Click this button to get the next queue details.
Cancel button	Click this button to cancel the search process.

4.4.1.2.3 Viewing cases from queues

You can view the queues by clicking the **Get Queue** icon in the **Actions** column of the **RPR Case Summary** page. The **Search** form appears. This form helps you to search the queues and work on the related cases.

However, you can access the queues from the **Search Results** section by clicking the **Edit Queue** icon in the **Actions** column.

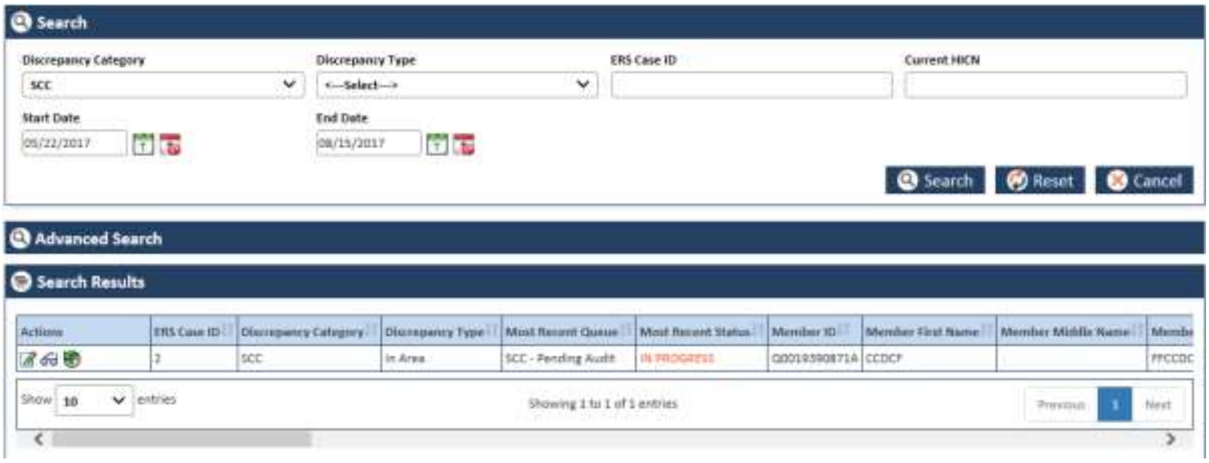


Figure 4-125: The RPR Queue Search form

For more information on how to search cases, refer to the Searching OOA Queues section.

4.4.1.2.4 Viewing Reports

<place holder for image and contact>

4.4.1.3 Manage Case Form

The Manage Case page has multiple sections such as Work Case, Action, and Workflow Log. The Work Case section of the form contains multiple tabs such as Case Details, Discrepancy Data, CMS Transaction Details, One Stop Shop, Reference Cases, Comments, and Attachment section.

The following section discusses details about the workflow involved in the new cases. All the associated actions, next queues, next statuses are described in the RPR Queues and Actions section.

***Note**: All the fields marked with asterisk in the form are mandatory fields.*

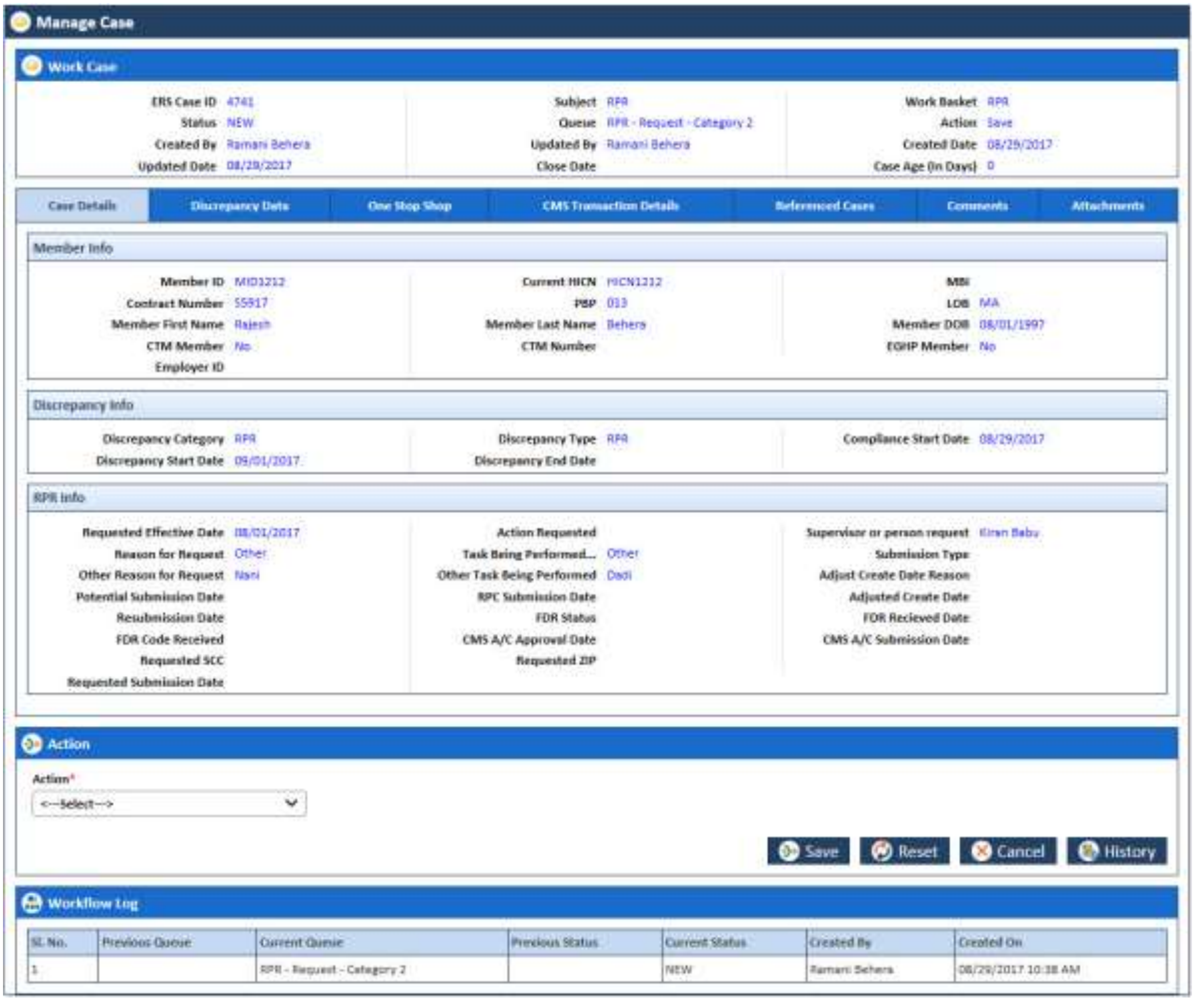


Figure 4-126: The Manage Case form

1.1.1.1 Work Case Section> Header

All the fields are available in the read-only mode.

Figure 4-127: Work Case Section> Header Section

Field Name	Description
ERS Case ID	Displays the ERS Case ID.
Status	Displays the current status.
Updated By	Displays user name that updated the case.
Created By	Displays the user that created the case.
Updated Date	Doesn't display the date when the case is update.
Subject	Displays the subject.
Queue	Displays the current queue name. For new RPR queue the queue name is RPR-Request-Category.
Updated By	Displays the username that updated the case.
Close Date	Doesn't display the case close date until the case is closed.
Work Basket	Displays the work basket name.
Action	Displays the type action taken the in the previous stage.
Created Date	Displays the case creation date.
Case Age (In Days)	Displays the case age.

4.4.1.4 Work Case Section> Case Details Tab

The values are populated from the Create RPR Case form while creating the new RPR case. This tab has three sections such as Member Info, Discrepancy Info, and RPR Info.

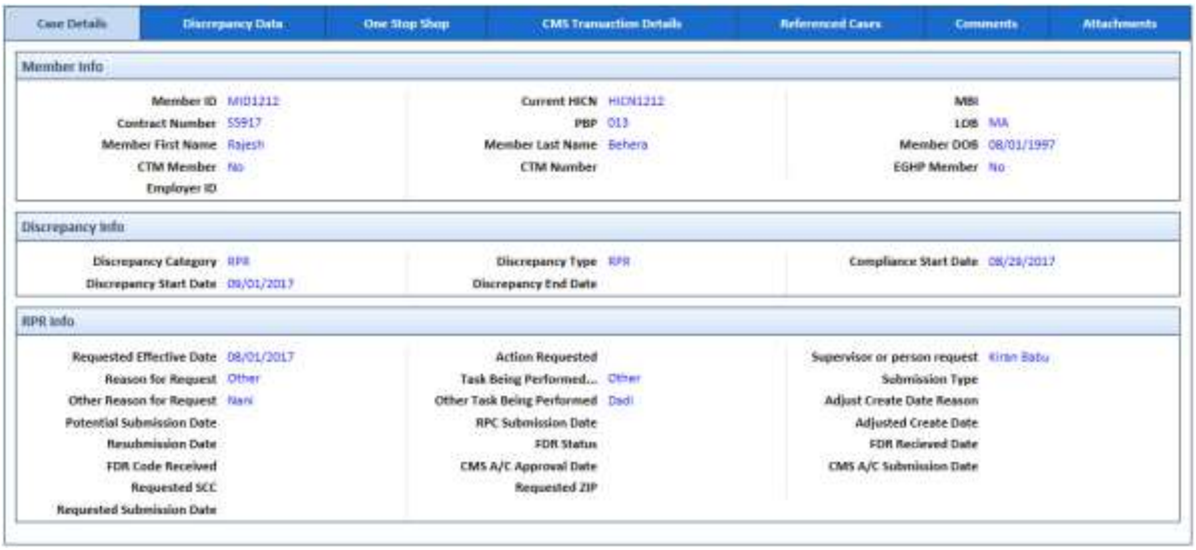


Figure 4-128: Work Case Section> Case Details Tab

Field Name	Description
Member info All the values are auto-populated from **Member Info** section of the **Create OOA Case** form.	

Field Name	Description
Member ID	Displays the member ID.
Current HICN	Displays the HICN number.
MBI	Displays the MBI.
Contract Number	Displays the contract number.
PBP	Displays the PBP.
LOB	Displays the LOB.
Member First Name	Displays the first name of the member.
Member Last Name	Displays the last name of the member.
Member DOB	Displays the member DOB.
CTM Member	Displays the value for CTM Member.
CTM Number	Displays the CTM Number
EGHP Member	Displays the value for EGHP Member.
Employer ID	Displays the Employer ID.
Discrepancy info **All the values are auto-populated Discrepancy Info section of the Create RPR Case form.**	
Discrepancy Category	Displays the discrepancy category.
Discrepancy Type	Displays the discrepancy type.
Compliance Start Date	Displays the compliance start date.
Discrepancy Start Date	Displays the discrepancy start date.
Discrepancy End Date	Displays the discrepancy end date.
RPR Info	
Requested Effective Date	Displays the requested effective date.
Reason for Request	Displays the reason for requesting the case.
Potential Submission Date	Displays the potential submission date.
Resubmission Date	Displays the resubmission date.
FDR Code Received	Displays the received FDR Code.
Requested SCC	Displays the requested SCC.
Requested Submission Date	Displays the requested submission date.
Action Requested	Displays the Action Requested
Task Being Performed...	Displays the task being performed.
RPC Submission Date	Displays the RPC submission date.
FDR Status	Displays the FDR status.
CMS A/C Approval Date	Displays the CMS A/C approval date.
Requested ZIP	Displays the requested zip.
Supervisor or person request	Displays the supervisor or person request.
Submission Type	Displays the submission type.
Adjust Create Date Reason	Displays adjust create date reason.
Adjusted Create Date	Displays the adjusted create date.
FDR Received Date	Displays the FDR received date.
CMS A/C Submission Date	Displays the CMS A/C submission date.

4.4.1.5 Work Case Section> Discrepancy Data Tab

This tab displays all the discrepancy data are also populated from GPS.

Figure 4-129: The Discrepancy Data Tab> GPS Data Sub-tab

Field Name	Description
Member info All the values are auto-populated from **GPS.**	
HICN	Displays the HICN.
LOB	Displays the LOB.
PBP	Displays the PBP.
Date of Birth	Displays the date of birth.
City	Displays the city.
Plan Effective Date	Displays the plan effective date.
SCC Effective Date	Displays the SCC effective date.
Out of Area Indicator	Displays the out of area indicator.
Application Approved Status	Displays the application approved status.
Member ID	Displays the member id.
Line of Business Desc	Displays the line of business description.
First Name	Displays the member first name.
Address Line 1	Displays the member address line 1.
Zip Code 5	Displays the member city zip code 5
State	Displays the state the member belongs to.
Plan Term Date	Displays the plan term date.
SCC End	Displays the SCC end
GPS OOA Disenrollment Date	Displays the GPS OOA disenrollment date.
GPS Household ID	Displays the GPS household ID
Contract Number	Displays the contract number.
Last Name	Displays the last name.
Address Line 2	Displays the address line 2.
Zip Code 4	Displays the member city zip code 4.
SCC Code	Displays the SCC code.
Application Information	Displays the application Information.
PDP Auto Enrollee Indicator	Displays the PDP Auto Enrollee Indicator.
Individual Id	Displays the Individual Id.

4.4.1.6 Work Case Section> CMS Transaction Details Tab

Figure 4-130: Work Case Section> CMS Transaction Details Tab

Field Names	Description
Case Number, Date of Birth, Application Date, Election Type, FDR Status, FDR Description, Requested SCC,HICN, Contract ID, Effective Date, Resolution, FDR Code Received, FDR Rejection Type, Requested ZIP, Last Name, PBP, End Date, Root Cause, FDR Received Date, CMS Process Date, and Transaction Type	The value appear in these fields are in read-only mode.

4.4.1.7 Work Case Section> Address Verification-USPS Tab

Figure 4-131: Work Case Section> Address Verification-USPS Tab

Figure 4-132: Discrepancy Data Tab>UPSC Data Sub-tab

On For more information, refer to the Discrepancy Data Tab> UPSC Data Sub-tab section.

4.4.1.8 Work Case Section> One Stop Shop Tab

This section displays a report.

Figure 4-133: Work Case Section> One Stop Shop Tab

4.4.1.9 Work Case Section> Reference Cases Tab

This tab of the form displays all the cases related to this case.

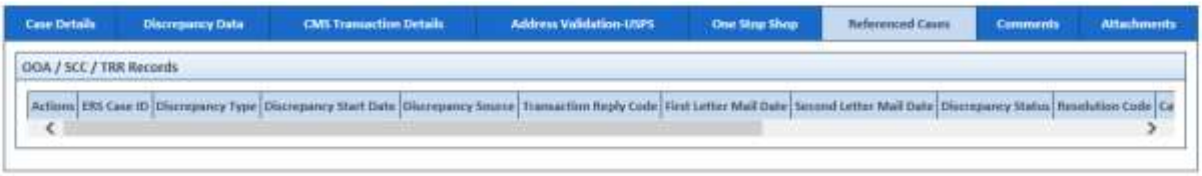


Figure 4-134: Work Case Section> Reference Cases Tab

4.4.1.10 Work Case Section> Comments Tab

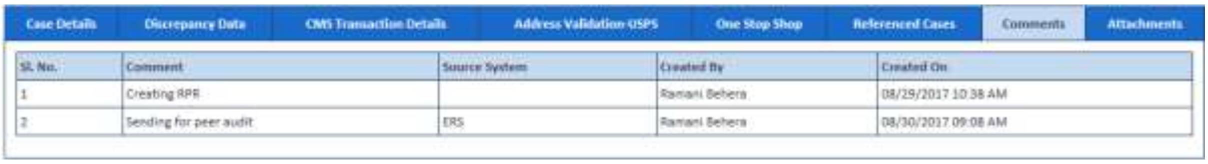


Figure 4-135: The Work Case Section> Comments Tab

Column Name	Description
Sl. No.	The serial no of the comments list is displayed.
Comments	The comments appear in this column is displayed.
System ID	The system ID is displayed.
Created By	The name of the user created the case is displayed.
Created On	The date when the case was created is displayed.

4.4.1.11 Work Case Section> Attachments Tab

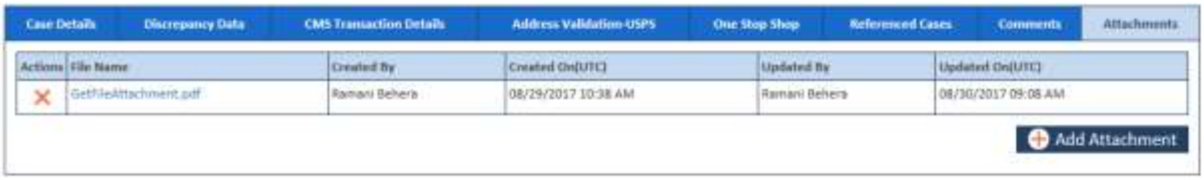


Figure 4-136: Work Case Section> Attachments Tab

4.4.1.12 Manage Case> Action Section

Based on the work basket selected while login or module you access, the action values changes in the respective queues forms.

For more information on various action values in the RPR queue, refer to RPR Queues and Actions section.

Action Values

Note: *When the RPR is sent for peer audit by selecting the action value **Send to Peer Audit**, the case routes to the **RPR Peer Audit** queues with the status **In Progress**.*

*If the peer auditor selects the value **Peer Audit Completed** in the **Action** field and selects the value **Yes** in the **Contains Error** field, the peer audit process is failed. And the cases routes to the **RPR - Peer Audit Failed** queue.*

*If the peer auditor selects the value **Peer Audit Completed** in the **Action** field and selects the value **No** in the **Contains Error** field, the cases routes to the **RPC Submission Category 2** queue.*

Associated fields in the Action section

The following table shows the fields those appear based on selection of certain value in the Action field of the queue form. This table also displays some fields which appears based on selection certain values in the fields which appears after selection of the certain values in the Action field.

Associated Fields	Appears when…	Description
Comments	You select the value Add Comments, Close Casein, Pend Case, Send OOA Letter, Send SCC Update to CMS, and Send to Peer Audit the Action field.	Enter your comments about the action you selected while working on the queue. The comments you enter will appears in the next work flow.
Resolution	You select the value Close Case in the Action field.	Select the appropriate resolution from the list for which you are closing the case. The following value are available in this field: • Added to SCC RPR SharePoint • Attested No Incarceration • Auto Enrolled • False Discrepancy • IA

Associated Fields	Appears when…	Description
		• Member Response OOA Term • NO Response FT Term • OOA Term - Incarceration • Termed
First Letter Mail Date	You select the value IA and No Response FT Term the Resolution field.	Enter the date when the first mail intimations letter was sent to the members.
Pend Reason	You select the value Pend Case in the Action field.	Select the appropriate reason for making the case a pend case.
First Letter Mail Date	You select the value Send OOA Letter in the Action field.	Enter the date when the first mail intimations letter was sent to the members.
Last Name	You select the value Send SCC Update to CMS in the Action field.	Enter the last name of the member.
Date of Birth	You select the value Send SCC Update to CMS in the Action field.	Enter the date of the birth of the member.
PBP	You select the value Send SCC Update to CMS in the Action field.	Select the PBP.
Contract Number	You select the value Send SCC Update to CMS in the Action field.	Select the contract number.
Application Date	You select the value Send SCC Update to CMS in the Action field.	Enter the application date of the case.
Effective Date	You select the value Send SCC Update to CMS in the Action field.	Enter the effective date of the case.
End Date	You select the value Send SCC Update to CMS in the Action field.	Enter the end date of the case.
Initial Address Verification Date	You select the value Member Response OOA Term in the Resolution field.	Enter the date when the address of the member verified first.
Member Response Verification Date	You select the value Member Response OOA Term in the Resolution field.	Enter the date when the member response was verified first.
Member Verified State	You select the value Member Response OOA Term in the Resolution field.	Enter name the state to which the verified member belongs to.
Second Letter Mail Date	You select the value No Response FT Term in the Resolution field	Enter the date when the second mail intimations letter was sent to the members

Action buttons

Action button	Description
Save	Click this button to send the form to next workflow level.
Reset	Click this button to remove any of the selection from the form.
Cancel	Click this button to cancel the process of the reviewing the queue.
History	Click this button to view the detailed history of the case.

Associated form in the Action section

Using the TRR Process Work form, you can initiate RPR cases. While selecting the action values, if you select the value SCC RPR Request, then SCC RPR Request section appears in the Action section.

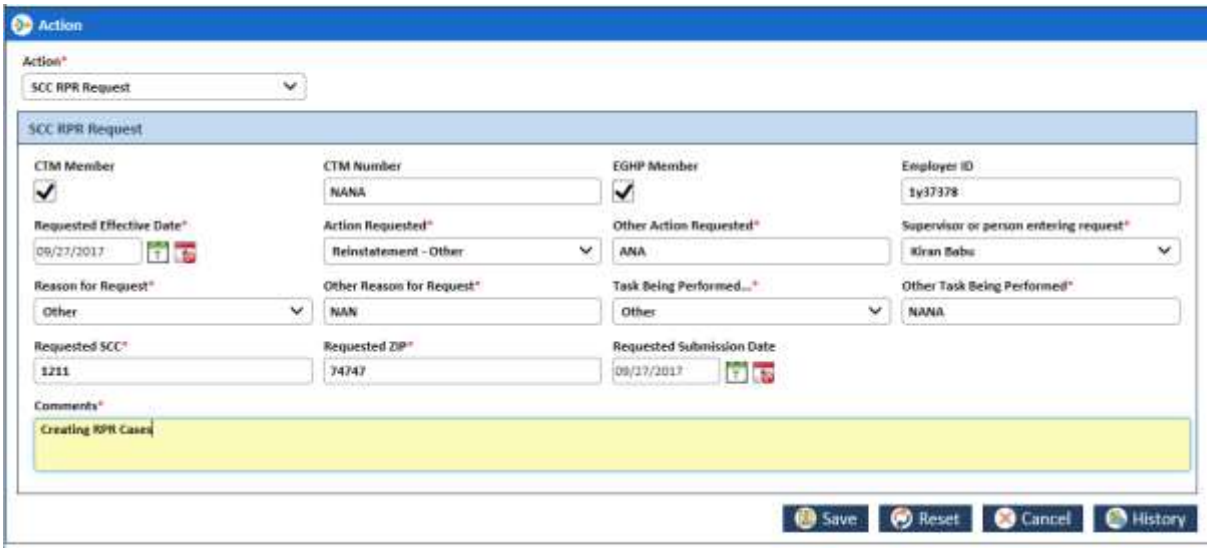


Figure 4-137: Thick RPR Request section in Action section

Action button	Description
CTM Member	Select this checkbox if you want to enter the Center for Transactional Medicine. If you select this field, then the CTM Number field becomes compulsory.
CTM Number	Enter the CTM number.
EGHP Member	Select the check box if you want enter the EGHP number details.
Employer ID	Enter the employee ID number.
Requested Effective Date	Enter the date since when you have initiated the RPR updated the plan.
Action Requested	Select the appropriate value in this field. These are the types of the actions you can request.
Other Action Requested (Appears if you select the value in the **Reinstatement – Other** in the **Action Requested** field)	Enter the other action in this field.
Supervisor or person entering request	Select the name of the supervisor that requested to update the plan and initiate the RPR.
Reason for Request	Select the appropriate reason for the request from the list. If you select the value Others, an associated field, Other Reason for Request appears.
Other Reason for Request (Appears if you select the value in the **Other** in the **Reason for Request** field)	Enter the other reason in this field.
Task Being Performed...	Select the appropriate task is being performed from the list. If you select the value Others, an associated field, Other Task Being Performed appears.
Other Task Being Performed (Appears if you select the value in the **Other** in the **Task Being Performed...**field)	Select the other task being performed.
Requested SCC	The requested SSC appears in this field.
Requested ZIP	
Requested Submission Date	
Comments	

4.4.2 TRR Process Work >Workflow Log Section

The workflow log provides the details about various cases such as their current and previous statuses and queues, date on when it was created and the associated roles.

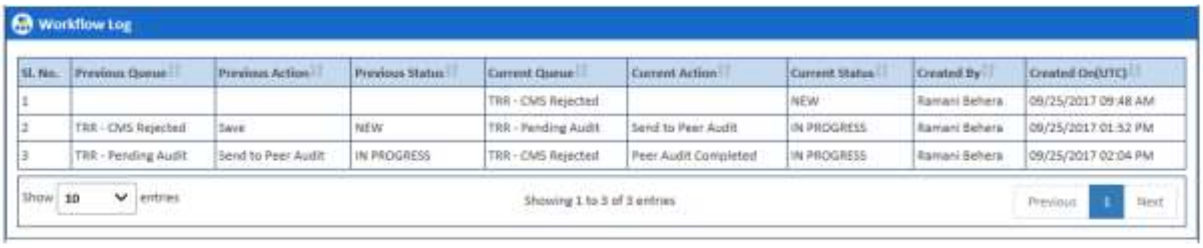


Figure 4-138: Workflow Log Section

Columns Name	Description
Sl. No.	Displays the serial numbers of the cases in the table.
Previous Queue	Displays the name of the previous queue of the case.
Previous Action	Displays the name of the previous action taken for the case.
Previous Status	Displays the name of the previous status of the case.
Current Queue	Displays the name of the current queue of the case.
Current Action	Displays the name of the current action taken for the case.
Current Status	Displays the name of the previous status of the case.
Created By	Displays the name of the role that created case.
Created On (UTC)	Displays the date when the case was created.

Chapter 5 ERS Managers

This chapter provides details about the activities a manager can perform while working on the ERS application. This chapter discusses, in detail, various managerial activities such uploading cases in bulk, unlocking locked cases, reassigning cases to different users, and updating the records in mass.

This chapter contains the following sections:

- Managing Bulk Upload of Enrolments
- Reassign Enrolment
- Mass update

Manager can perform multiple managerial tasks in the ERS application. Manager can manage the enrolment tasks well so that all the enrolment tasks are duly attended and work on, this helps faster processing on enrolment records and quicker results.

The most important tasks include:

- Searching bulk uploaded enrolments and bulk uploading enrolment
- Searching unlocked enrolments and unlocking enrolments
- Searching Reassigned Enrollment and Reassigning Enrollment
- Searching cases for mass update and Updating mass case update

5.1 Managing Bulk Upload of Enrolments

Bulk upload is the process of uploading multiple cases/records in the system related to the discrepancies identified outside of the application comparison process. Manager has to upload the CSV file containing multiple case details in to the application so that the application creates cases using the discrepancies mentioned in the files. This helps automating and faster processing the cases in the application.

The file gets removed from the given location after the completion of the upload process. The cases are created in the application and the case is routed to the appropriate queue with a status of “New Case”.

5.1.1 Searching Bulk Uploaded cases

You can search uploaded cases using the Bulk Upload form. If you click the Search button after selecting all the search criteria, the search details appears in the **Bulk Upload Search Results**.

Navigation:

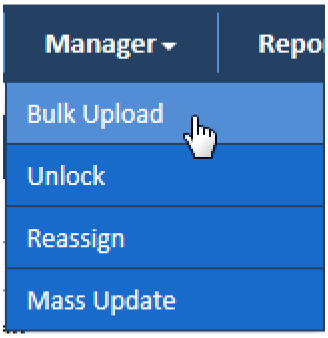


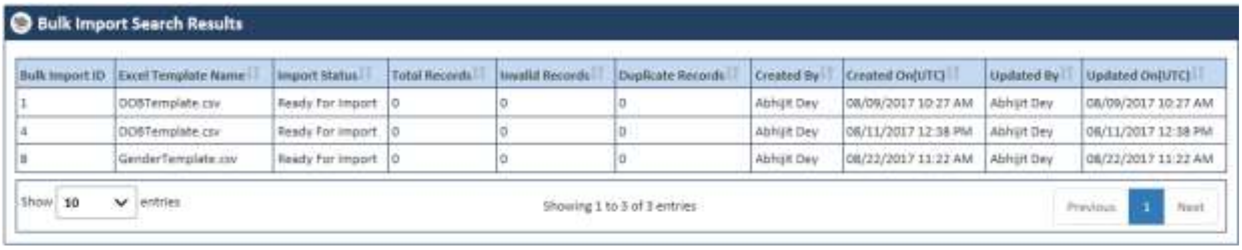
Figure 5-1: Manager Subsystem> Bulk Upload Link

To access the Bulk Upload form, go to the **Manager** menu, and click the Bulk Upload link. The Bulk Upload form appears.

Figure 5-2: Bulk Uploaded form> Searching Bulk uploaded cases

Field Name	Description
Bulk Import ID	Enter the bulk upload ID for searching the cases in the system.
Start Date	Enter the date from which you started uploading the bulk cases files in the system.
End Date	Enter the date till which you uploaded the bulk cases files in the system.
Workbasket	The value in this field is auto-populated based on the user login which is based on the value selected in the work basket field.
Discrepancy Category	Select appropriate values for uploading the CVS files.
Sample Template	This displays the CVS files.
Search	Click this button to search the bulk uploaded field in the system
Reset	Click this button to remove search criteria.
Cancel	Click this button to cancel the search process.
Upload	Click this button to upload the files selected Sample Template field.

5.1.1.1 Search Results


Bulk Import Search Results

Bulk Import ID	Excel Template Name	Import Status	Total Records	Invalid Records	Duplicate Records	Created By	Created On(UTC)	Updated By	Updated On(UTC)
1	DOBTemplate.csv	Ready For Import	0	0	0	Abhijit Dey	08/09/2017 10:27 AM	Abhijit Dey	08/09/2017 10:27 AM
4	DOBTemplate.csv	Ready For Import	0	0	0	Abhijit Dey	08/11/2017 12:38 PM	Abhijit Dey	08/11/2017 12:38 PM
8	GenderTemplate.csv	Ready For Import	0	0	0	Abhijit Dey	08/22/2017 11:22 AM	Abhijit Dey	08/22/2017 11:22 AM

Show 10 entries Showing 1 to 3 of 3 entries Previous 1 Next

Figure 5-3: Bulk Import Search Results

Column Name	Description
Bulk Import ID	Displays the bulk import ID.
Excel Template Name	Displays the Excel template (CVS) name.
Import Status	Displays the import status. This field displays the current status of the field such as Ready for Import.
Total Records	Displays the total records for each CVS files.
Invalid Records	Displays the invalid records for each CVS files.
Duplicate Records	Displays the duplicate records for each CVS files.
Created By	Displays the user that uploaded the files.
Created On(UTC)	Displays the date when the files are updated.
Updated By	Displays the user that updated files.
Updated On(UTC)	Displays the date when the files are updated.

5.1.2 Uploading Bulk Enrolments

You can upload as many cases as possible in the system using the CVS Excel files. These files contain all the case details which can be imported and new case can be created by system. For uploading the bulk files, you need to use the Bulk Upload form.

Navigation:

Refer to the Navigation section, of the Searching Bulk Uploaded cases section to access the Bulk Upload form.

5.1.2.1 Bulk Upload Form

Figure 5-4: Bulk Upload Form

<table>
<tr><th>Field Name</th><th>Description</th></tr>
<tr><td>Bulk Import ID</td><td>Enter a bulk upload ID for uploading files.</td></tr>
<tr><td>Start Date</td><td>Enter the date from which you want to start uploading the bulk cases files in the system.</td></tr>
<tr><td>End Date</td><td>Enter the date till which you want to upload the bulk cases files in the system.</td></tr>
<tr><td>Workbasket</td><td>The value in this field is auto-populated based on the user login. This is based on the value selected in the Workbasket field while logging in to the application.
The following values are available in this field.
OST
RPR
GS vs MMR</td></tr>
<tr><td>Discrepancy Category</td><td>Select appropriate values for uploading the CVS files.
Based on the values in the Workbasket field, the values appear in this field.
Following values are available in this field.
<table>
<tr><td>OST</td><td>OOA</td></tr>
<tr><td></td><td>SCC</td></tr>
<tr><td></td><td>TRR</td></tr>
<tr><td>GPS vs MMR</td><td>Eligibility</td></tr>
<tr><td></td><td>DOB</td></tr>
<tr><td></td><td>Gender</td></tr>
<tr><td>RPR</td><td>RPR</td></tr>
</table></td></tr>
<tr><td>Sample Template</td><td>This sample temple is displayed in this field. Managers can download the sample template and fill the required data and upload it. The field values are directly depend on the value selected in the Discrepancy Category field. For example, if you select the value DOB in the Discrepancy Category field, then DOB Template appears in the field.
The this field displays the following sample templates:
<table>
<tr><th>Workbasket</th><th>Discrepancy Category</th><th>Sample Template</th></tr>
<tr><td>OST</td><td>OOA</td><td>OOA Template</td></tr>
<tr><td></td><td>SCC</td><td>SCC Template</td></tr>
<tr><td></td><td>TRR</td><td>TRR Template</td></tr>
<tr><td>GPS vs MMR</td><td>Eligibility</td><td>Eligibility Template</td></tr>
<tr><td></td><td>DOB</td><td>DOB Template</td></tr>
<tr><td></td><td>Gender</td><td>Gender Template</td></tr>
<tr><td>RPR</td><td>RPR</td><td>RPR Template</td></tr>
</table></td></tr>
<tr><td>Search</td><td>Click this button to search the bulk uploaded field in the system.</td></tr>
<tr><td>Reset</td><td>Click this button to remove search criteria.</td></tr>
<tr><td>Cancel</td><td>Click this button to cancel the search process.</td></tr>
<tr><td>Upload</td><td>Click this button to upload the files selected Sample Template field.</td></tr>
</table>

Field Name	Description
	The File Upload window appears. Manager can upload the filled in Excel file from the local drive

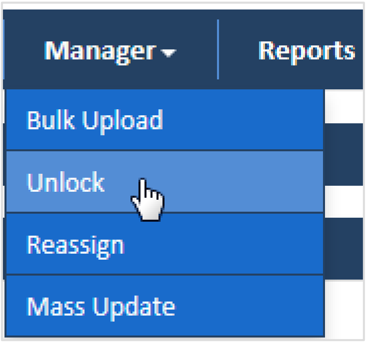
5.1.3 Unlock Enrolments

As a Manager, you can unlock the records used and locked by other users in their absence. This helps effective management of record assignment and completion of case processing faster. You can search for the records you want to unlock before reassigning them to other users.

5.1.3.1 Searching unlocked enrollment

For searching the locked records in the system, you can access the Unlock Search form.

Navigation:



To access the Unlock Search form, go to the **Manager** menu, and click the Unlock link. The Unlock Search form appears along with Advanced Search and Search Results sections.

Figure 5-5: The Unlock Search Form

Field Name	Description
Discrepancy Category	Select the discrepancy category in this field. The following values available in this field: • OOA • SSC • TRR • Eligibility • Gender • DOB • RPR
Discrepancy Type	Select the discrepancy type in this field. The value that appears in this field depends on the value selection in the Discrepancy Category field.
ERS case ID	Enter the ERS case ID in this field.
Current HICN	Enter the HICN ID in this field.
Start Date	Enter the date from which you want to search the locked cases.

Field Name	Description
End Date	Enter the date till which you want to search the locked cases.
Search	Click the Search button to search the locked the cases.
Reset	Click this button to remove all the search criteria.
Cancel	Click this button to cancel the search process.

5.1.3.1.1 Search Results

Figure 5-6: The Search Results

Column Names	Description
Actions, ERS Case ID, Locked On, Locked By, Urgency, Assigned To, Status, Current HICN, GPS HICN, MMR HICN, First Name, Discrepancy Category, Discrepancy Start Date, Discrepancy End Date, Reason, Resolution, Line of Business, Referenced Eligibility Case, Indicator, MMR PBP, GPS Individual ID, Discrepancy Source NTID, Submission Type, CTM Member, EGHP Member, Requested Effective Date, Action Requested, Potential Submission Date, RPC Submission Date, FDR Received Date, FDR Code Received, FDR Status, RPR Requestor, Created On, Created By, Last Updated On, and Last Updated By	All the values are displayed in all the columns. The Action column the Unlock icon so that you can take proper action in the **Action** column.

5.1.3.2 Unlocking Enrolments

You can unlock the records after the search results. To unlock the locked cases, you can use the Unlock form.

Navigation:

To access Unlock form, click lock icon in the Action column. The Unlock the form appears.

5.1.3.2.1 Unlock form

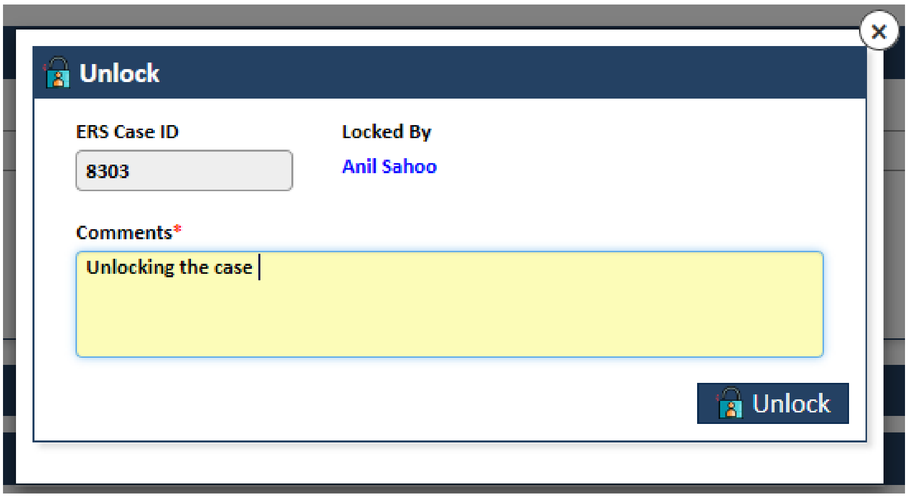


Figure 5-7: The Unlock form

Field Name	Description
ERS Case ID	This field displays the ERS case ID.
Locked By	This field displays the user that locked the case.

Field Name	Description
Comments	Enter the comments about the case.
Unlock	Click Unlock button to unlock the case. A message, "**Record successfully unlocked"** appears if you click the Unlock button.
Close	Click the close X icon to close the Unlock window.

*Note: The unlocked cases are not available in the system if the manager searches them through the **Unlock Search** form.*

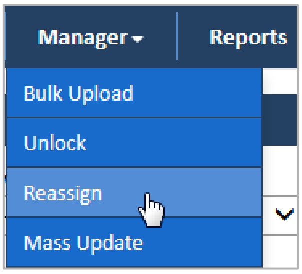
5.2 Reassign Enrolment

As a Manager, you can reassign the records that are used particular users, to a different user. Before reassigning the records, you have to search and identify the records that need to be reassigned. Based on the search result, you can select multiple cases to be assigned to a particular user. You can either select all records or some of the records to reassign to the user through the bulk upload process.

5.2.1 Searching Reassigned Enrollment

To search the records that you want to reassign to other users, you need to access the Reassign Search form.

Navigation:



To access the Reassign Search form, go to the **Manager** menu and click the Reassign link. The Reassign Search form appears along with Advanced Search and Search Results section.

5.2.1.1 Reassign Search form

Figure 5-8: Reassign Search

Field Name	Description
Discrepancy Category	Select the discrepancy category in this field. The following values available in this field: • OOA • SSC • TRR • Eligibility • Gender • DOB • RPR If you select discrepancy category and discrepancy type and do not select the other values in other field, multiple records are available in the Search Results section.
Discrepancy	Select the discrepancy type in this field. The value that appears in this field

Field Name	Description
Type	depends on the value selected in the Discrepancy Category field.
ERS case ID	Enter the ERS case ID of the case that you want to search. If you provide the ERS case ID in the search criteria, then specific record related to the case ID appears in the Search Result section.
Current HICN	Enter the current HICN ID in this field. If you provide the Current HICN in the search criteria, then specific record related to the HICN appears in the Search Result section.
Start Date	Enter the date from which you want to search the locked cases.
End Date	Enter the date till which you want to search the locked cases.
Search button	Click this button to search the locked the cases. A list of the locked cases appears in the Search Result section.
Reset button	Click this button to remove all the search criteria.
Cancel button	Click this button to cancel the search process.

5.2.1.2 Advanced Search

For more information advanced search, refer to the Advanced Search section.

5.2.1.3 Search Results

Figure 5-9: The Search Results

The Search Results provides all the details about the cases.

1.2.1.1 Reassigning Enrollment

You can reassign the records those are initially assigned to other users. In the Search Results section, you select multiple records and do bulk assignments to different user.

Figure 5-10: The Search Results Section

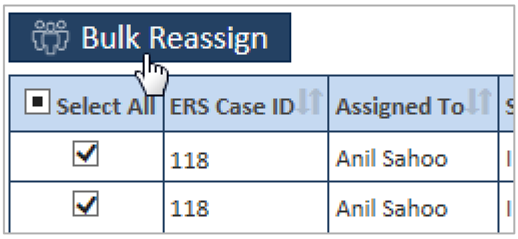


Figure 5-11: Selecting Records

You can select one or multiple records in line with ERS Case ID by selecting check boxes under the Select All column.

*If you select the one or more check boxes ☑ then the check box ▣ beside Select All column appears. If you select all the records ☑ in the **Select All** column, or click the ▣ check box or ☐ check box besides **Select All**, ☑ appears besides **Select All** column.*

To bulk assign the records:

1. Select one or more records ▣ Select All in the Select All column or click the check box ☑ Select All besides Select All. The records are selected.

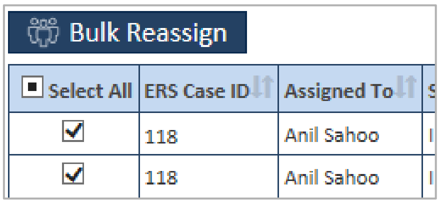


Figure 5-12: The Select All column

2. Click the Bulk Assign  button. The Bulk Assign dialog window appears.

Figure 5-13: Bulk Reassign dialogue window

3. In the Reassign To field, select the user that you want to assign the record to work on.
4. In the comments field, enter the comments about you action. If you processed without entering the comments, an message "**Please enter comments**" appears.
5. Click the Bulk Assign button. A message "**Records reassigned successfully**" appears after you click the **Bulk Assign** button.

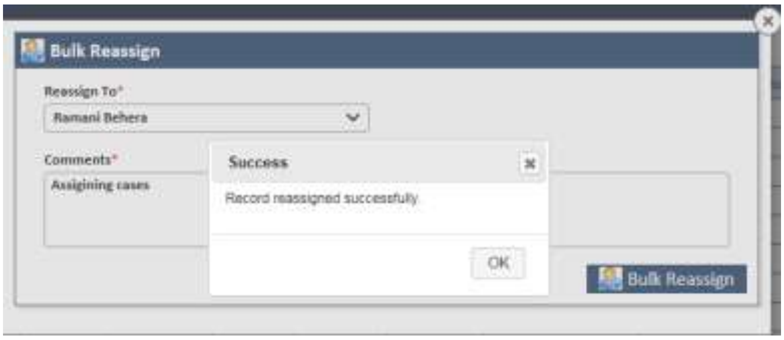


Figure 5-14: Bulk assignment success message

If you search the records that you reassigned to different user, you can see the records are reassigned to new users in the Assigned To column in the Search Result table.

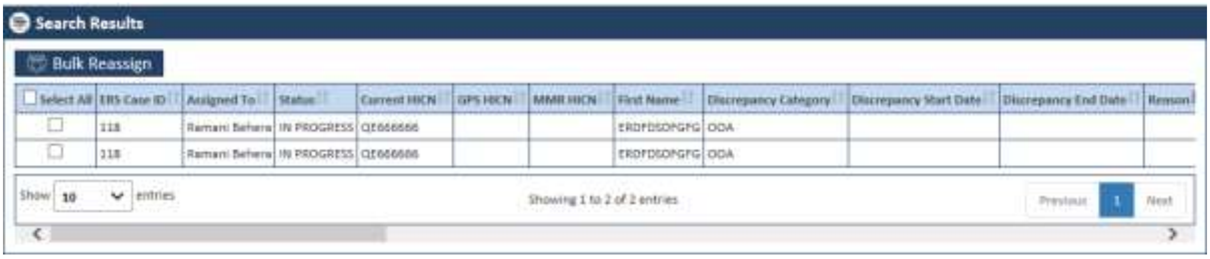


Figure: Search Result> Reassignment

5.3 Mass update

As a manager, you can select one record or multiple records and update these records for further processing. Before updating the records, you can search those records in the system that you want to update at a time.

5.3.1 Searching Records for Mass Update

Using Mass Update Search form, you can search the records that you want to update at a time. This update is based on the queues that you selected while searching the records and the action values you selected while assigning the records. The search result displays all the records with same values in the fields such as Discrepancy Category, Discrepancy Type, Most Recent Queue, and Most Recent Status in all the records.

To search the records that you want to do mass update, you need to access the Mass Update Search form.

Navigation:

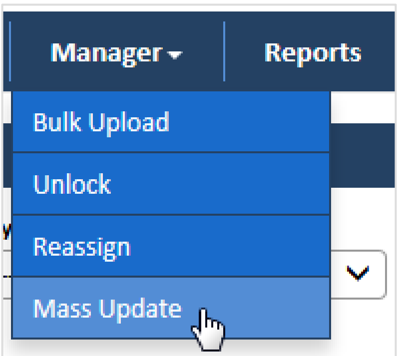


Figure 5-15: Mass Update Link

To access the Mass Update Search form, go to the **Manager** menu and click the Mass Update link. The Mass Update Search form appears along with Advanced Search and Search Results section.

5.3.1.1 Reassign Search form

Figure 5-16: Reassign Search

Field Name	Description
Discrepancy Category	Select the discrepancy category in this field. The following values available in this field: • OOA • SSC • TRR • Eligibility • Gender • DOB • RPR If you select discrepancy category and discrepancy type and do not select the other values in other field, multiple records are available in the Search Results section.
Discrepancy Type	Select the discrepancy type in this field. The value that appears in this field depends on the value selected in the Discrepancy Category field.
ERS case ID	Enter the ERS case ID of the case that you want to search. If you provide the ERS case ID in the search criteria, then specific record related to the case ID appears in the Search Result section.
Current HICN	Enter the current HICN ID in this field. If you provide the Current HICN in the search criteria, then specific record related to the HICN appears in the Search Result section.
Start Date	Enter the date from which you want to search the locked cases.
End Date	Enter the date till which you want to search the locked cases.
Queue	Select the queue in this field. Based on the queues selected in this field, the all records appear in the search result.
Search button	Click this button to search the locked the cases. A list of the locked cases appears in the Search Result section.
Reset button	Click this button to remove all the search criteria.
Cancel button	Click this button to cancel the search process.

5.3.1.2 Advanced Search

For more information advanced search, refer to the Advanced Search section.

5.3.1.3 Search Results

Figure 5-17: The Search Results

The Search Results provides all the details about the records.

1.3.1.1 Updating mass records

You can update one or multiple records and complete the record processing faster. In the Search Results section, you select multiple records and you can do mass update of the cases. While updating the, you can select required action based on the queue. Based on action value selected, the cases route to the next processing queues.

Figure 5-18: The Search Results Section

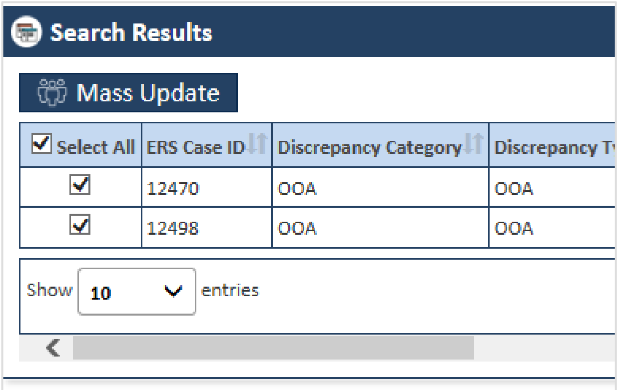


Figure 5-19: Selecting Records

You can select one or multiple records in line with ERS Case ID by selecting check boxes under the Select All column.

If you select the one or more check boxes ☑ then the check box ▣ beside Select All column appears. If you select all the records ☑ in the ***Select All*** *column, or click the ▣ check box or ☐ check box besides* ***Select All****, ☑ appears besides* ***Select All*** *column.*

To mas update records:

1. Select one or more records ▣ Select All in the Select All column or click the check box ☑ Select All besides Select All. The records are selected.

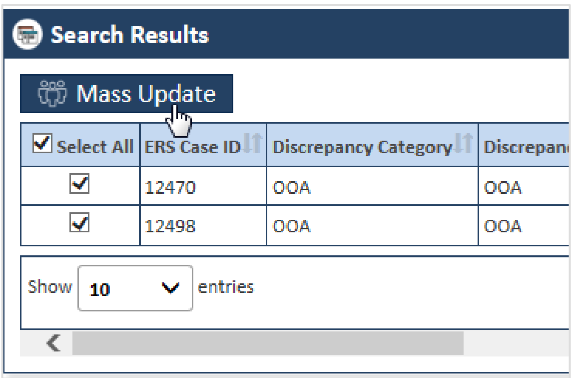


Figure 5-20: The Select All column

2. Click the Mass Update [Mass Update] button. The Action dialog window appears.

Figure 5-21: The Action dialogue window

3. In the Action field, select the appropriate action and select the values in associate fields.
4. Click the Save button. A message "Record updated successfully" appears after you click the Save button.
5. Click Reset to remove all the selected values.
6. Click Cancel to cancel the record update process.

Based on the queue that you selected while searching records, the action value appears in the Action field of the queue forms. Follow the steps while taking action in the Action field of the respective queue forms corresponding to the queues available in the search result.

For more information on the Action sections of the various queue forms in the OOA queues, refer to the OOA Process Work> Action Section.

For more information on the Action sections of the various queue forms in the SCC queues, refer to the SSC Process Work> Action Section.

For more information on the Action sections of the various queue forms in the TRR queues, refer to the TRR Action section.

For more information on the Action sections of the various queue forms in the Eligibility queues, refer to the Eligibility Process Work> Action Section.

For more information on the Action sections of the various queue forms in the DOB/Gender queues, refer to the DOB/Gender Work> Action Section.

For more information on the Action sections of the various queue forms in the RPR queues, refer to the Manage Case> Action Section.

Chapter 6 ERS Administration

Administration of ERS application involves creating and managing various skills, access groups and users. These include creation, editing, and management of skills, access groups and users roles. Every user belongs to access groups and every access groups is associated with a skill.

Administrator has the rights to creates and manage the skills, access groups and user roles. For better administration and management, this is ideal to create skills and associate them with queues; create access groups and associate skills and reports with them; and users and assign access groups to them.

Before performing any administrative activities, you must log in to the application with administrator access rights.

The chapter contains the following section:

- Manage Skills
- Manage Access Group
- Managing users

6.1 Manage Skills

A skill is entity/activity which a particular user in an access groups can perform or utilize while working on the various ERS queues.

As an Administrator, before creating users and access groups, you must crate skills in the systems. You can assign work queues to the existing and newly created skills and must associate these skills to access groups.

6.1.1 Searching Skills

You ca search the existing skills in the system before creating a new skill. You can access the Skills search window to provide the search criteria for searching the skills.

Navigation:

To access the Skills window to search skills:

1. Log in to the application as an administrator selecting role as Admin.
2. Go to the **Administration** menu and navigate to and right-click Manage Skills link.

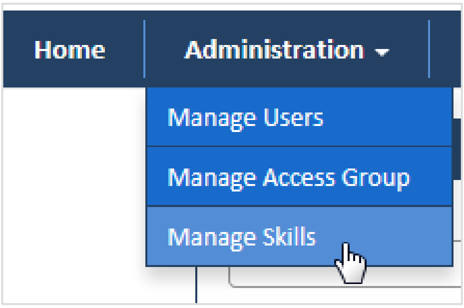


Figure 6-1: Administration Menu> Manage Skills link

The Skills search window appears.

3. Navigate to the Skill search window.

6.1.1.1 The Skill Search window

Provide the details the field in the search window for searching skills.

Figure 6-2: The Skill Search window

Columns Name	Description
Skills Name	Enter the name of the skill.
Role	Select the name of the role in this field. This skill belongs to the role that you selected in this field. The following roles are available in this field: • Admin • Manager • Processor • Viewer
Business Segment	Select the business segment in this field. This skill belongs to the business segment that you selected in this field. • C & S • M & R • PCP
ERS Department	Select the ERS department in this field. This skill belongs to the ERS department. The following department are available in this field: • C & D - Billing • C & D - Customer Service • C & D - Enrolment • C & D - Sales • M & R - Billing • M & R - Customer Service • M & R - Enrolment • M & R - Sales • PCP - Billing • PCP - Customer Service • PCP - Enrolment • PCP - Sales
WorkBasket	Select the work basket in this field. This skill belongs to the workbasket.
Is Active	Select this check box.
Add New	Click this button to add new skill. The Skill window appears.
Search	Click this button to search skills. Based on the search criteria, the skills appear in the Search Results table.
Reset	Click this button to remove all the entered and selected search criteria.
Cancel	Click this button to cancel all the search process.

6.1.1.2 Search Results

Figure 6-3: The Skill Search Results

Columns Name	Description
Actions	Click the required action icon to take proper action. Edit Skill: Click this icon to edit skill. The Skill window appears after you click this icon. View History: Click this icon to view the history.
Skills Name	Displays the skills name.
Business Segment	Displays the business segment.
Department	Displays the department.
Work Basket	Displays the work basket.
Role	Displays the role.
Created By	Displays the user name that created the skill.
Created On(UTC)	Displays the date when the skill was created.
Last Updated By	Displays the user name that last updated the skill.
Last Updated On(UTC)	Displays the date when the skill was last updated.
LockedBy	Displays the user name that locked the skill.
LockedOn(UTC)	Displays the date when the skill was locked.

6.1.2 Adding/Creating New Skills

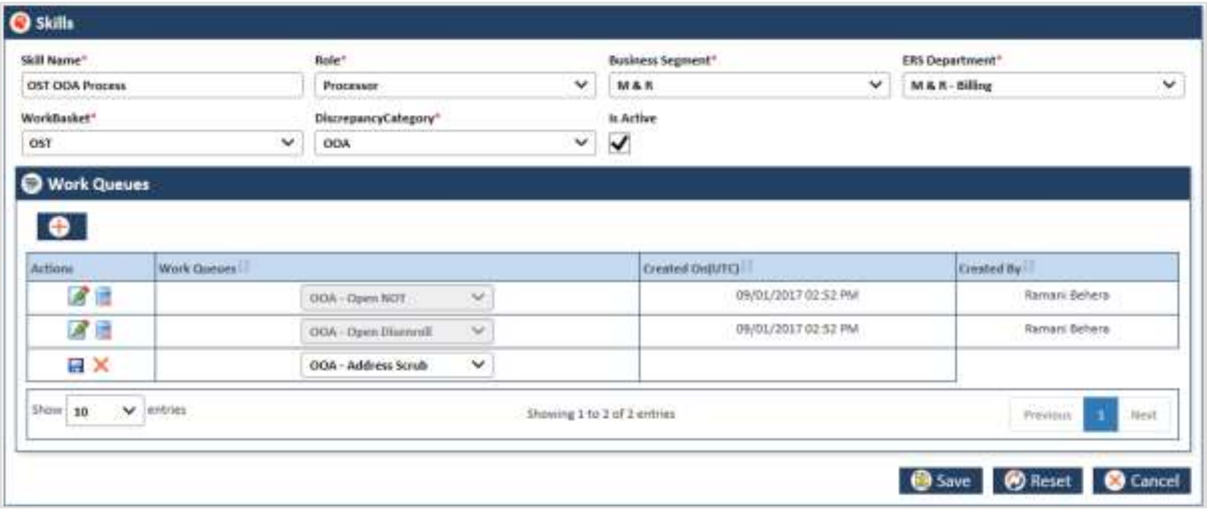


Figure 6-4: Skill Window> Adding Skills

Field Name	Description
Skill Name	Enter the name of the skill. Provide a unique name with keeping in view the role, business segment, department and work basket. This helps easy identification of the skill.
Role	Select the role for which you create this skill. The following roles are available in this field: • Admin • Manager • Processor • Viewer
Business Segment	Select the business segment in this field. This skill belongs to the business segment that you selected in this field. • C & S • M & R • PCP
ERS Department	Select the ERS department in this field. This skill belongs to the ERS department. The following department are available in this field: • C & D - Billing • C & D - Customer Service

Field Name	Description
	• C & D - Enrolment • C & D - Sales • M & R - Billing • M & R - Customer Service • M & R - Enrolment • M & R - Sales • PCP - Billing • PCP - Customer Service • PCP - Enrolment • PCP - Sales
WorkBasket	Select the work basket in this field. This skill belongs to the workbasket.
DiscrepancyCategory	Select the discrepancy category. The values in this field are displayed depending on the values selected in the WorkBasket field.
Is Active	Select this check box to make this active in the system.

6.1.2.1 Adding Work queue to Skills

You can add work queue to the skill that you added newly. Before you add work queue, click the icon. All the values in the respective columns appear with Work Queues column in edit mode.

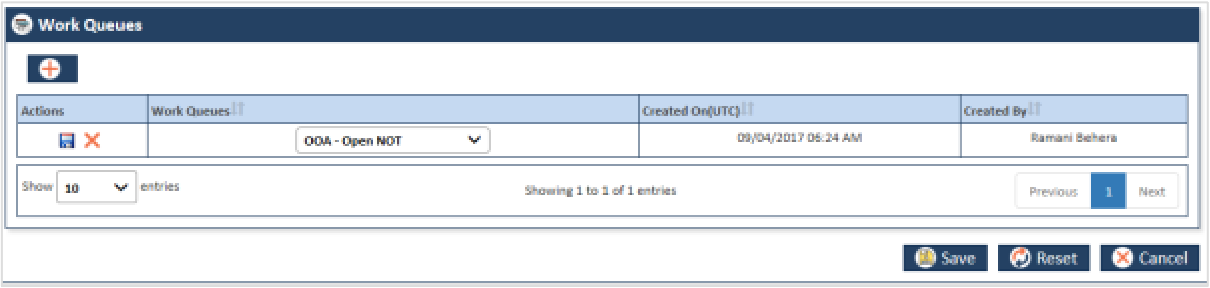


Figure 6-5: The Adding Work queue> Edit mode

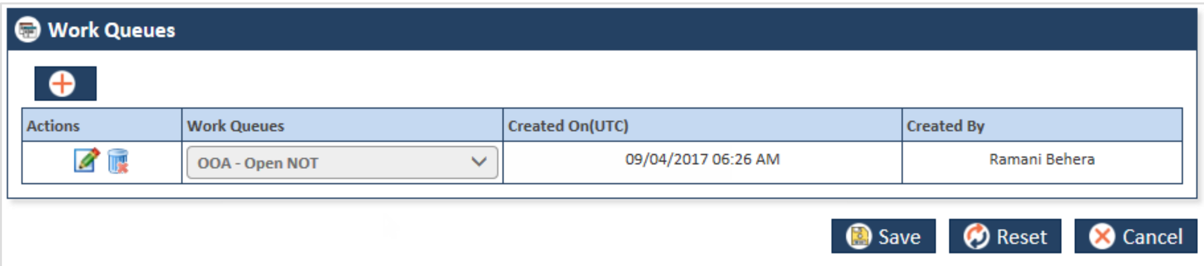


Figure 6-6: The Adding Work queue> Queue Added

Field Name	Description
Work Queue Attach a work queue to this skill. All the columns in this section displays values after you click the Add queue icon.	
Add Work Queue	Click this icon to add Work Queue to the skill. The value in the column appears. You can add multiple queues after saving the initial queuing.
Actions	Take the appropriate action this field. After you add a work queue by clicking the button, the **Save and Delete** actions appears in the Actions sections. Before saving the work que, select the appropriate work queue value in the Work Queue column. • **Save**: Click the Save icon to save the select the work queue. After you click this icon, the Save and Delete changes to Edit

Field Name	Description
	and Delete icons respectively • **Delete**: To remove this queue, clicks the Delete icon. After you click this icon, the Save and Delete changes to Edit and Delete icons, respectively. Click once again the Delete icon to remove entire row. • **Edit**: Click Editi icon to edit the work queue. The **Work Queue** column becomes editable and allows you to select any value. • **Delete**: Click icon to delete the work queue added.
Work Queues	Select the appropriate action value in this field. The values available in the field are depends on the value you select in the Discrepancy Category field. Based on the discrepancy category, the value are appears in this field. For example, if you select the value RPR, in the Discrepancy Category, the all the predefined queues are available in this field. The following message appears while adding the work queue. • **You cant add duplicate work queue:** appears if you add same queue for multiple times. • **You have one record in Work Queues in edit mode:** appears if you try adding and deleting work queue when work queue is in edit mode. • **Do you want to delete?:** appears if you want to delete the added work queues.
Created On(UTC)	This field displays the date when the queue is added to the skill. The value in this field doesn't appear in edit mode. Once you save the selected work queue, value in this field appears.
Created By	Displays the name of the user that added the work queue.

6.1.2.2 Editing/ Adding skills

6.2 Manage Access Group

After you added the skills and attached the work ques to it. You can manage the access groups. You can associate a access group to the skill and

6.2.1 Searching Access Group

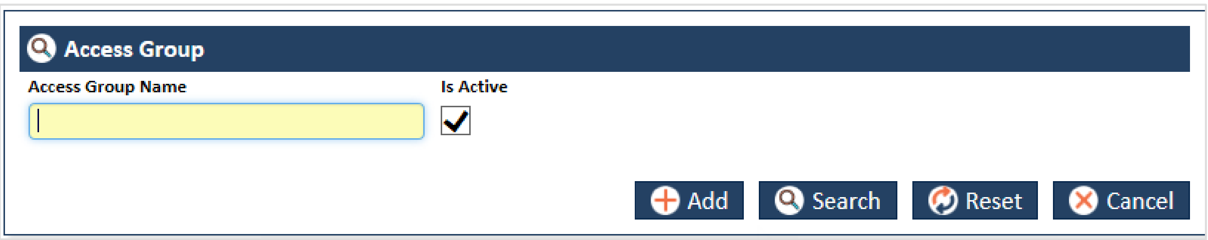


Figure 6-7: Searching Access Groups

Field Name	Description
Access Group Name	Enter the name of the access group.
Is Active	Select this check box to get all the active access groups. If you do not select this checkbox, no value appears in the Search Results section.
Add	Click this button to add new access groups. The **Access Group** for appears.
Search	Click this button to get all the active access groups. If you do not select this

Field Name	Description
	checkbox, no value appears in the Search Results section.
Reset	Click this button to reset all the search criteria.
Cancel	Click this button to cancel the search process.

6.2.2 Managing access group

6.2.2.1 Editing/ Adding Access Groups

You can add new access groups and attach the skills that you created to the access group. You can also attach reports while creating access groups.

To add new access group, you have to access the Access Groups form.

Navigation:

To navigate to the Access Group form:

1. Go the **Administration** menu and navigate and click the **Manage Access Groups** link.

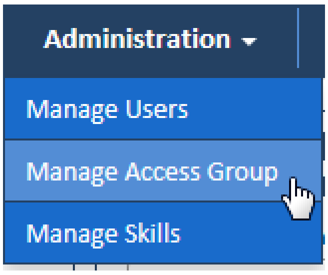


Figure 6-8: Manage Access Group Link

2. The **Access Groups** search form appears

Figure 6-9: Access Group Search Form

3. Click the **Add** button.

   The **Access Group** form appears

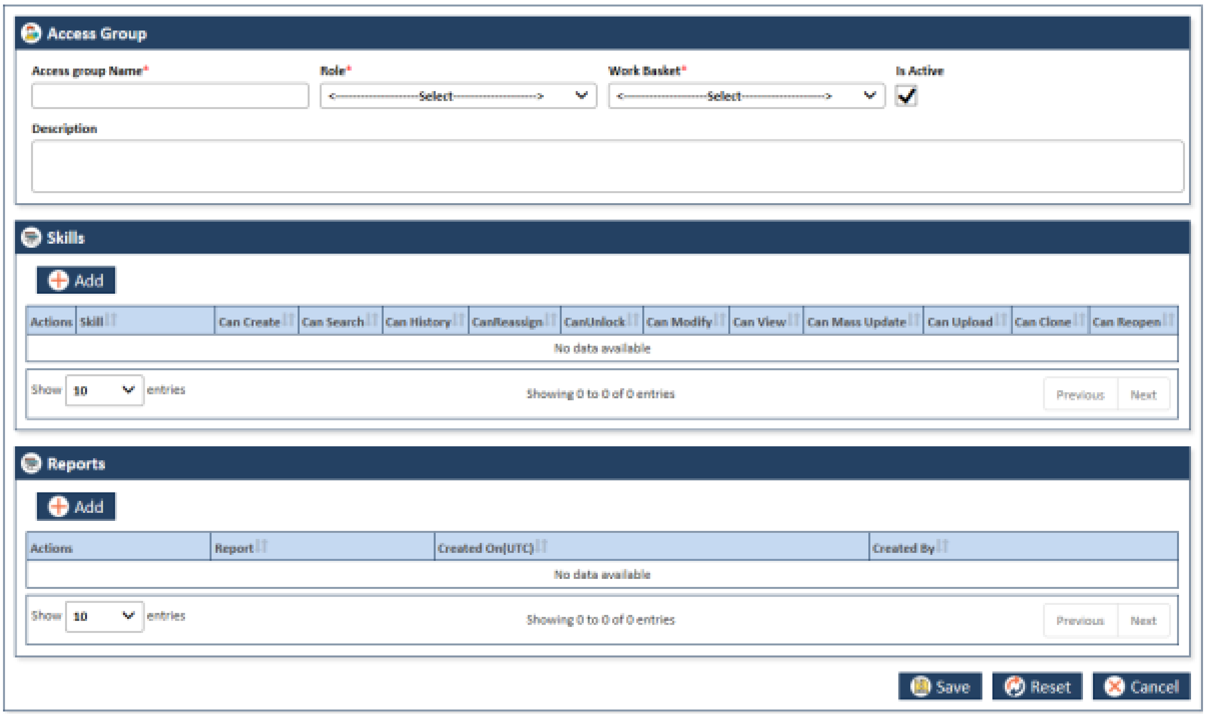


Figure 6-10: Access Group form

6.2.2.2 Access Group Forms

Using the access group form, you can add new access group, attach newly created skill related to the Role and Work Basket.

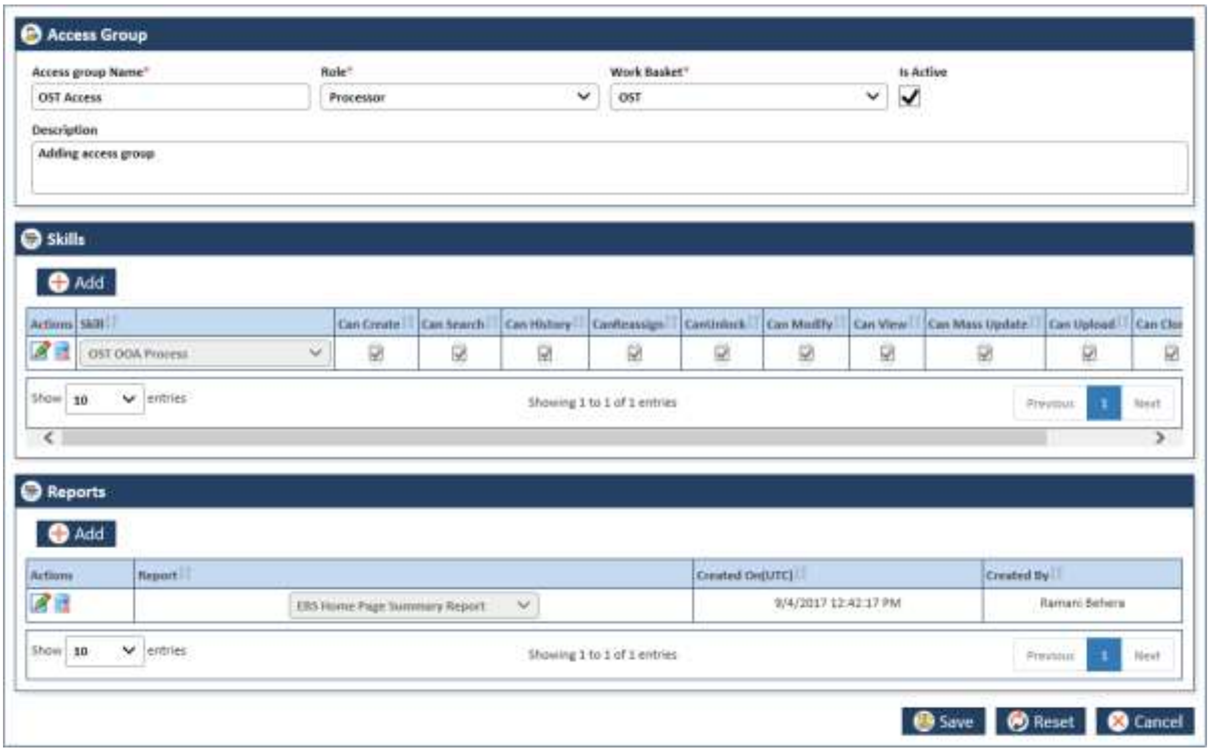


Figure 6-11: Adding Access Group

Field Name	Description
Access Group header section	
Access group Name	Enter a name for the new access group.
Role	Select the role name in this field. If you want add newly created skill related to OST, you have to select the role that you selected while created skill.

Field Name	Description
Work Basket	Select the required work basket. If you want to add OST related skill, you have to select OST.
Is Active	If you select this check box, the access group gets active in the system.
Description	Provide a description about the newly added access group.
Skill section	
Add button	Click this button to add skill related to the work basket. All the values in this row available.
Actions	Take appropriate action in the Action sections. To add and delete skill, refer to the Action column in the Adding Work queue to Skills section.
Skill	Select the sill in this column. Values in the section depend on the value selected in the WorkBasket field. For example, if you have selected OST in the Work Basket field, the all the OST related skills appear in this section. To add and delete skill, refer to the Action column in the Adding Work queue to Skills section.
Can Create, Can Search, Can History, CanReassign, CanUnlock, Can Modify, Can View, Can Mass Update, Can Upload, Can Clone, and Can Reopen	You must select one or more activities of the responsibilities. If you click the Save button in the Actions column, without selecting at least one responsibility, the error message "You Must Check One Check Box Against The Skill".
Reports section	
Add button	Click this button to add Report row.
Actions	Take the appropriate action in this field. To add and delete skill, refer to the Action column in the Adding Work queue to Skills section.
Report	Select the appropriate report in this field. To add and delete skill, refer to the Action column in the Adding Work queue to Skills section.
Created On(UTC)	Displays the date when the access group was created.
Created By	Displays the user who created the access group.

6.3 ERS Administration

6.3.1 Manage users

You can assign the new users or existing users to the access to groups existing or newly created in the system. Before assigning the user to the access group, you can search the user that you want assign to the access group. You can also create new users.

6.3.2 Searching users

You can search the existing user in the system using the Search User for.

Navigation:

To access, the Search Users page, go the Administration subsystem, and navigate and click the Manage Users link. The Search User form appears.

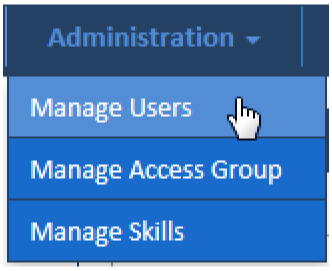


Figure 6-12: Accessing Search User Form

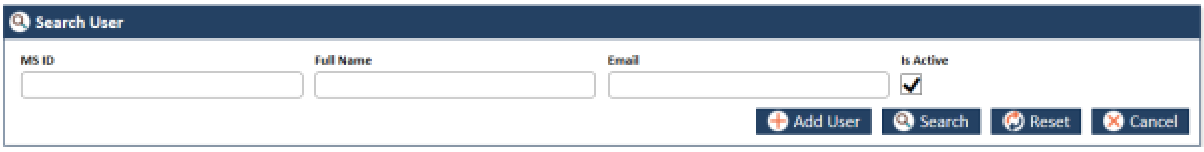


Figure 6-13: Search User form

6.3.2.1 Searching users

Figure 6-14: Search User Page

Field Name	Description
MS ID	Enter the MS ID of the user that you want to search.
Full Name	Enter the full name of the user.
Email	Enter the email address of the user.
Is Active	Select this check box if the user is active in the system.
Add User	To Add users click this button. The User Administration page appears along with User Address, Specialist Info and Access Groups section.
Search	Click this button to search the user based on the search criteria.
Reset	Click this button to reset the search criteria.
Cancel	Click this button to cancel the search process.

6.3.2.2 User Search Result

The search result appears after you search the user in the entering the search criterial in the User Search form.

Figure 6-15: User Search form

Field Name	Description
Actions	You can edit the user or View History by click these icon respectively in this column.
MS ID	Display the MS ID of the user.
Full Name	Displays the full name of the user.
Email	Displays the email of the user.
Start Date(UTC)	Displays the start date (UTC) when the user was created.
End Date(UTC)	Displays the date till which the user is valid in the system.

Field Name	Description
LockedBy	Displays the user that locked the user in the system.
LockedOn(UTC)	Displays the date when the user is locked.

6.3.3 Managing users

You can manage the user by adding or editing the user along the details such as address, specialist information. You can also assign the access group to the user.

6.3.3.1 Adding users admin

Navigation:

To access, the User Administration form:

1. Go to the **Administration** subsystem, and navigate and click the **Manage Users** link. The **Search User** form appears.

Click the **Add User** button. The User Administration form appears.

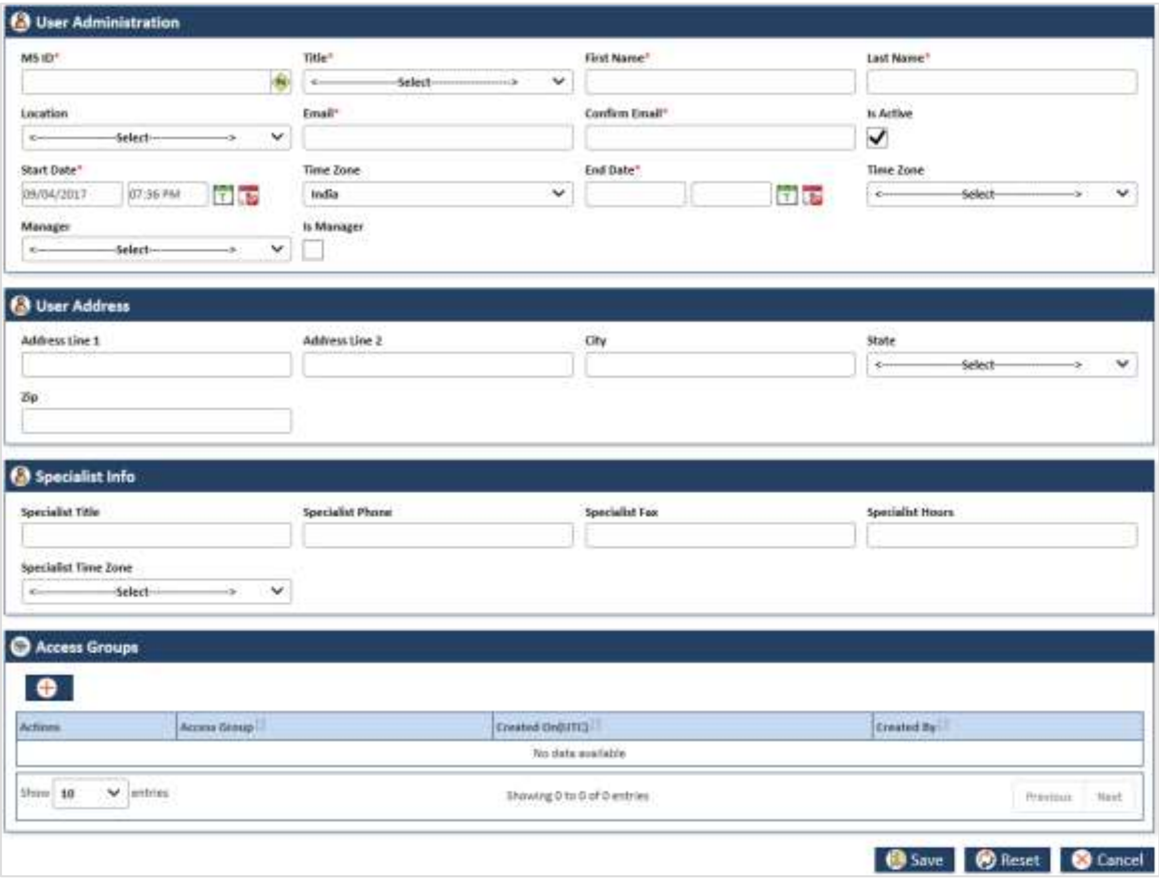


Figure 6-16: Adding User Administration form

6.3.3.2 User Administration form

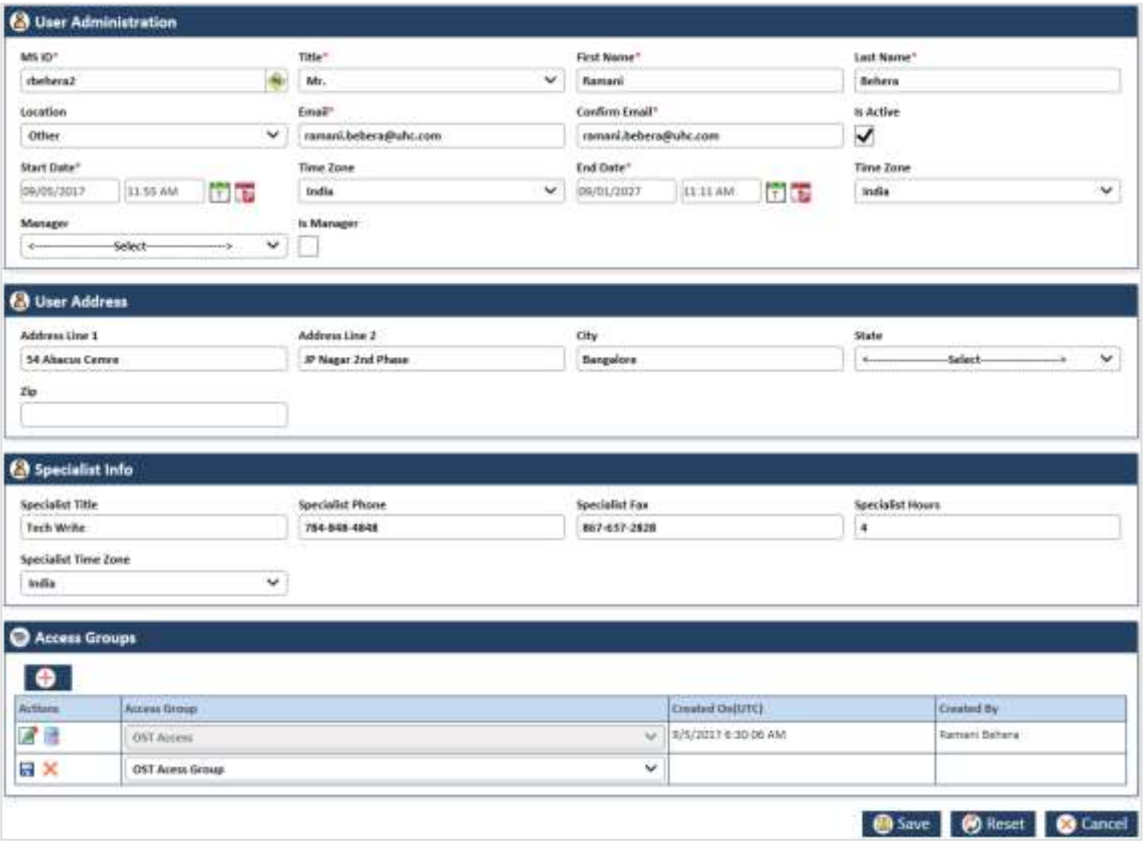


Figure 6-17: The User Administration form

Field Name	Description
Access Administration	header section
MS ID	Enter the MS ID of the use that you want create user details in the system. Click the get Icon
Title	Select the title of the user in this field.
First Name	Enter the First name of the user.
Last Name	Enter the last name of the user.
Location	Select the location of the user. The following locations are available in this field. • Airoli • Bangalore • Cebu • Chennai • Hyderabad • Noida • Onshore • Other
Email	Enter the email identification of the user.
Confirm Email	Enter the email identification of the user again for confirmation.
Is Active	Select this check box to make the user details active in the system.
Start Date	Enter date and time when first time the user details was created in the system.
Time Zone	Select the time zone in this section.
End Date	Select this check box to make the user details active in the system.
Time Zone	Enter date and time till which the user details will be active in the system.
Manager	Select the name of the manager.

Field Name	Description
Is Manager	Select this check box, if the selected manager is the manager of the user.
User Address	
Address Line 1	Enter the address in this field.
Address Line 2	Enter the address in this field.
City	Select the name of the city in this field.
State	Select the name of the state in this field.
Zip	Enter the zip code of the city in this field.
Specialist Info	
Specialist Title	Enter the specialist title in this field.
Specialist Phone	Enter the specialist phone number in the field.
Specialist Fax	Enter the specialist fax number in this field.
Specialist Hours	Enter the specialist hours in this field.
Specialist Time Zone	Enter the specialist time zone in this field.
Access Groups	
Add Button	Click this icon to add access group to the user. All the values in the column appear. You can add multiple access groups after saving the initial access groups.
Actions	You can save/edit and delete the access group. For more information on adding and deleting actions, refer to the Action field descriptions in the Adding Work queue to Skills section.
Access Group	Select the access group in this section. The values appear in this section, based on the login criterial. If the user logs in to application using OST work baskets, all the Access Groups attached with OOA skill appear in this section. If you attach this access group for this user, the user gets access to the queues containing skills in particular access group.
Created On(UTC)	Displays the date when the user account was created.
Created By	Displays the details about the user that created the user account.

Chapter 7 ERS Maintenance

This chapter contains the following sections:

- Enrolment Maintenance
- Maintaining Configurations
- Maintaining Alerts
- Maintaining Departments
- Maintaining Lookups
- Maintaining Lookup Correlations
- Maintaining Resources

7.1 Enrolment Maintenance

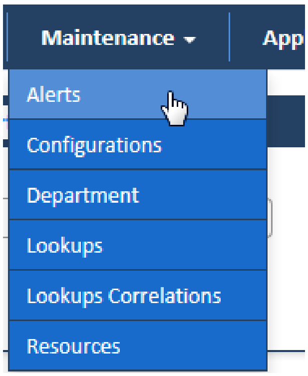
Administrators maintain the application regularly for proper management of various features and functionalities. They manage and maintain the system by setting up, configuring, and managing various backend technical and configurational settings that help support run the application effectively. They implement required system settings to maintain application messages, configurations, departments, lookups and lookup correlations and resources.

7.1.1 Maintaining Alerts

As an Administrator, you can create and set alerts that can be sent to any individual or department regarding any task and activities. These are specific notifications, messages and information that are sent to departments or individuals. You can update, add, and delete the messages and set alerts.

7.1.1.1 Searching Alerts

Navigation:



To access the **Search Alerts** search window, go to the **Maintenance** menu and click the **Alerts** link. The **Search Alerts** window appears.

Figure 7-1: The Search Alerts search window

Field Name	Description
Title	Enter the title of the alert that you want to search. If you search the alert without entering the title, all the active alerts in the systems appears in the Search Results section.

Field Name	Description
Description	Enter the description of the alert that you want to search. If you search the alert without entering the title, all the active alerts in the systems appears in the Search Results section.
Is Active	Select this check box if the alert is active in the application. If you don't select this checkbox, the alert doesn't appear in the search result.
Search	Click this button to search the alert in the application. The Search Result section appears with alert that you entered in the Title field.
Reset	Click this button to reset the search criteria.
Cancel	Click this button to cancel the search process.
Add New	This button is required to add new alerts.

7.1.1.1.1 The search results

If you search the alert without entering the title and the description, all the active alerts in the systems appears in the **Search Results** section.

Figure 7-2: The Alert Search Results

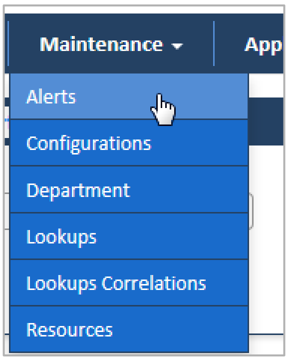
Figure 7-3: The Alert Multiple Search Results

Field Name	Description
Actions	Click the required action icon to take proper action. Edit Skill: Click this icon to edit alerts. The Alerts window appears after you click this icon. View History: Click this icon to view the history.
Title	Displays the title of the alert.
Description	Displays the description given for the alert.
Published Date(UTC)	Displays the alert publication date.
Is Active	Displays the value Yes, since all are active alerts.
Created On(UTC)	Displays the date when the alert was created.
Created by	Displays the user name that created the alert.
Last Updated On(UTC)	Displays the date when the alert was last updated.
Last Updated by	Displays the user name that last updated the alert.
LockedBy	Displays the user name that last updated the alert.
LockedOn(UTC)	Displays the user name that last updated the alert.

7.1.1.2 Adding Alerts

You can add and edit one or more alerts the system. You can create alert using the Alerts forms.

Navigation:



1. To access the **Search Alerts** search window, go to the **Maintenance** menu and click the **Alerts** link. The **Search Alerts** window appears.

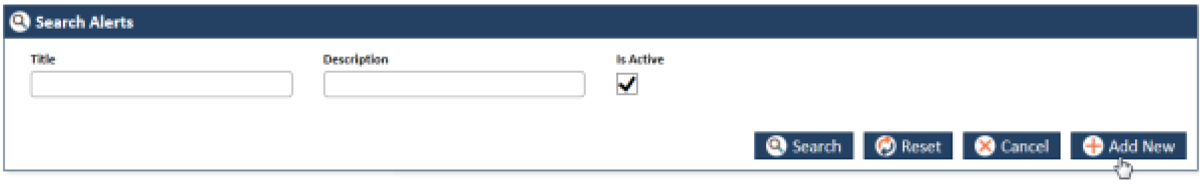


Figure 7-4: Search Alerts > Adding Alerts

2. Click the **Add New** button. The **Alerts** form appears.

Figure 7-5: The Alert Form

Field Name	Description
Title	Enter a title of the alert. You can enter maximum 250 characters in this field.
Description	Enter the description of the alert. You can enter maximum 5000 characters in this field.
Published Date	Enter the date and time when the alert can be published.
Time Zone	Select the time zone in where you want to publish the alert.
Effective Date	Select the date from which the alert can be effective.
Time Zone	Select the time zone where you want your alert be effective.
Criticality	Select the criticality in this field such as High, Medium, and Low.
Inactivation Date	Select the date and time till which the alert can be active in the system. This is required field if you don’t select the value in the Is Active field. You must enter a future date in this field.
Time Zone	Select the time where this can be inactivated.
Is Active	Select the check box if you want to activate the alert in the system. If you don’t select this check box, the alert cannot be active in the system.
Send Alert To	Select an appropriate value this field to which the alert can be sent. The

Field Name	Description
	following values are available in this field. • **All:** Select this value if you want to send the alert to all departments and individuals. • **Department:** Select this value if you want to send the alert to selective departments. • **Email:** Select this value if you want send the alert to a specific user.
Department This field appears if you select the value **Department** in the **Send Alert to** field.	Select the department to which you want to send the alert.
Email This field appears if you select the value Email in the Send Alert to field.	Select the email address of the user to who you want to send the alert.
Save	Click this button to save the details and create the alert in the system. An error message 'Record saves successfully' appears after you create the alert.
Reset	Select this button to remove all the values entered and selected in all the fields.
Cancel	Click this button cancel the search process.

7.1.1.3 Editing Alerts

You can edit the alert that you created or created by some other users. You need to access the alert by searching it before editing it. You need access the Alert form from **Search Results** section.

Navigations

1. Search and identify alert from **Search Results** section. For more information on searching the alerts, refer to the Searching Alters section. Search result appears.

Figure 7-6: The Alert Search Result

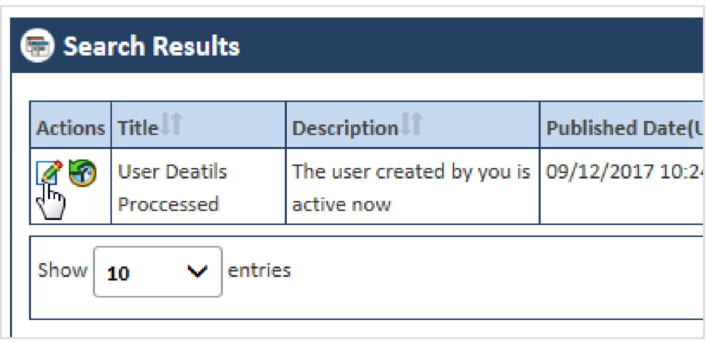


Figure 7-7: The Search Results> Action column

2. Go to the **Action** column and click the **Edit Alert** icon. The **Alert** form appears.

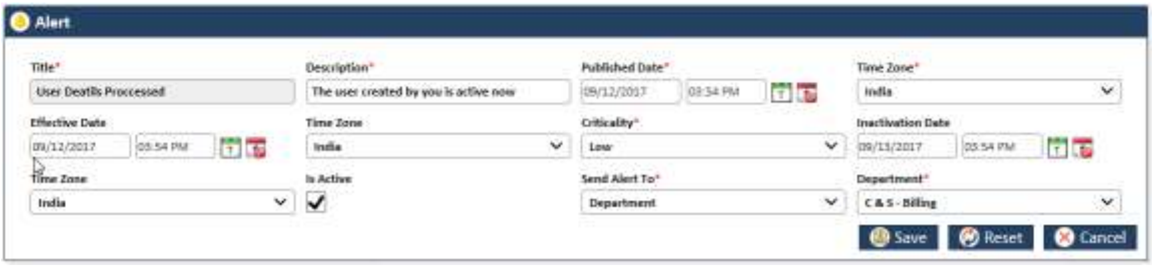


Figure 7-8: The Alert form for Editing

For more information on how to work on the Alerts form, refer to Adding Alerts section.

7.1.1.4 Viewing Alert History

7.1.2 Maintaining Configurations

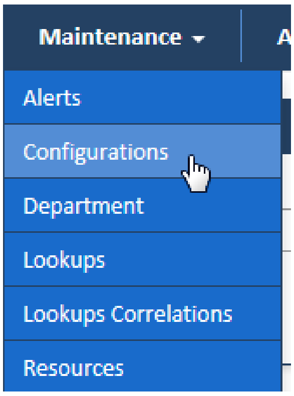
As an Administrator, you can maintain configuration in the application which can be used throughout the application. You can create, update and delete configuration in the application.

You can use the Add Configuration form to add configuration. You can edit the configuration using the Edit Configurations form.

Before adding configuration, you can search the configuration using the Search Configuration form.

7.1.2.1 Searching Alerts

Navigation:



To access the Search Configuration search window, go to the **Maintenance** menu and click the **Configurations** sub-menus. The Search Configuration window appears.

Figure 7-9: The Search Configurations search window

Field Name	Description
Configuration Name	Enter the name of the configuration that you want to search. If you search the configuration without entering the name, all the active configurations in the systems appears in the Search Results section.
Is Active	Select this check box if the configuration is active in the application. If you don't select this checkbox, the configuration doesn't appear in the search result.
Search	Click this button to search the configuration in the application. The Search Result section appears with configuration that you entered in the Name

Field Name	Description
	field.
Reset	Click this button to reset the search criteria.
Cancel	Click this button to cancel the search process.
Add	This button is required to add configuration.

7.1.2.1.1 The search results

If you search the configuration without entering the name, all the active configurations in the systems appear in the Search Results section.

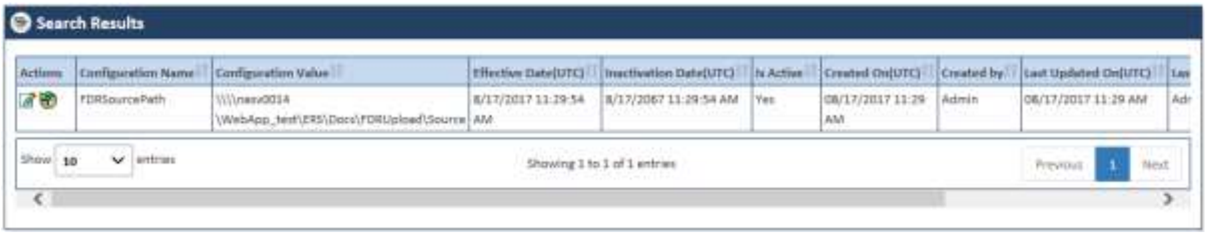


Figure 7-10: The Configurations Search Results

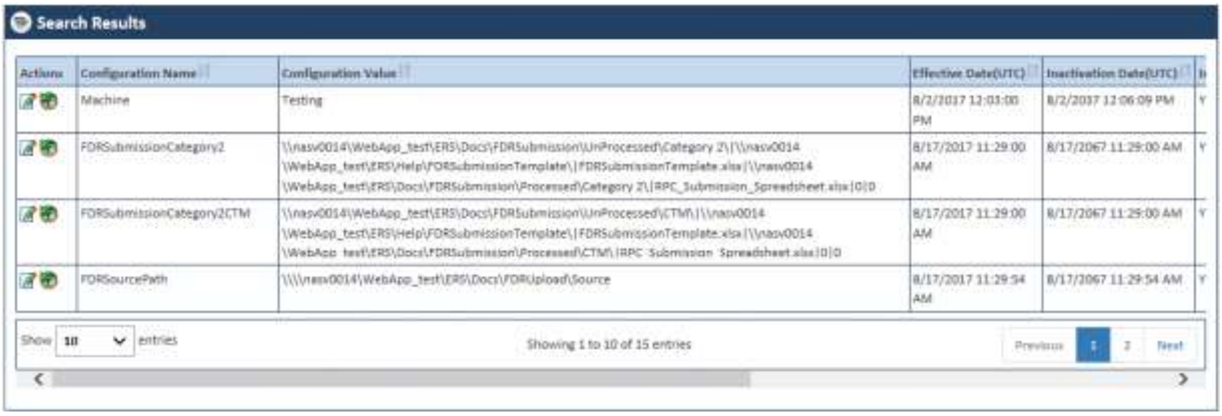


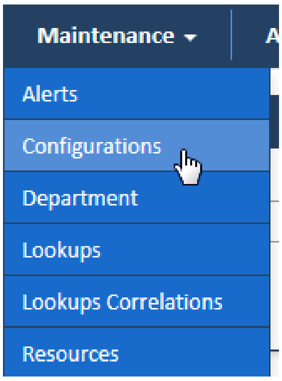
Figure 7-11: The Configurations Multiple Search Results

Field Name	Description
Actions	Click the required action icon to take proper action. • **Edit Skill**: Click this icon to edit configurations. The Edit Configurations form window appears after you click this icon. • **View History**: Click this icon to view the history.
Configuration Name	Displays the name of the configuration.
Configurations Value	Displays the description given for the configuration.
Published Date(UTC)	Displays the configuration publication date.
Effective Date(UTC)	Displayed the configuration effective date.
Inactivation Date(UTC)	Displayed the configuration inactivation date.
Is Active	Displays the value Yes, since all are active configurations.
Created On(UTC)	Displays the date when the configuration was created.
Created by	Displays the user name that created the configuration.
Last Updated On(UTC)	Displays the date when the configuration was last updated.
Last Updated by	Displays the user name that last updated the configuration.
LockedBy	Displays the user name that has locked the configuration.
LockedOn(UTC)	Displays the date when the locked the configuration.

7.1.2.2 Adding Configurations

You can add and edit one or more configurations the system. You can create configuration using the Configuration forms.

Navigation:



1. To access the **Configurations** search window, go to the **Maintenance** menu and click the **Configurations** sub-menu. The **Search Alerts** window appears.

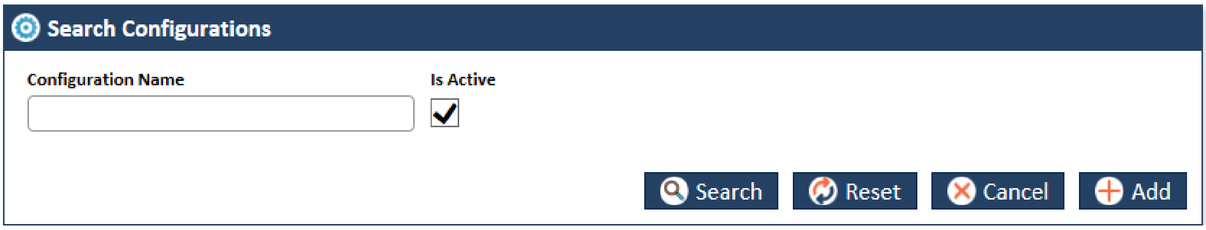


Figure 7-12: The Search Configurations Window> Adding Configurations

2. Click the **Add** button. The **Add Configurations** form appears

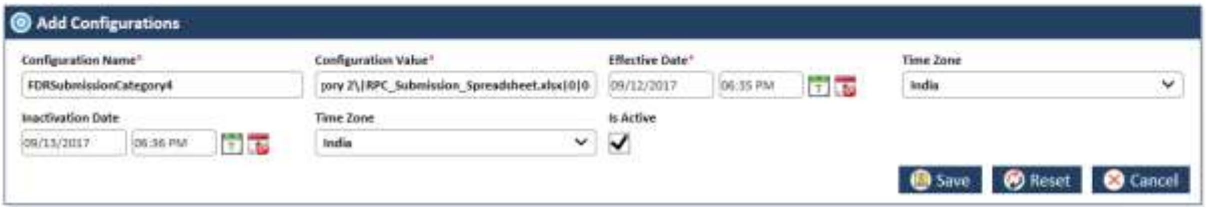


Figure 7-13: The Add Configurations Form

Field Name	Description
Configuration Name	Enter a name of the configuration. You can enter maximum 500 characters in this field.
Description	Enter the description of the configuration. You can enter maximum 2000 characters in this field.
Effective Date	Select the date and time from which the configuration is effective.
Time Zone	Select the time zone where you want the configurations to be effective.
Inactivation Date	Select the date and time till which the configuration can be active in the system. This is required field if you don't select the value in the Is Active field. You must enter a future date in this field.
Time Zone	Select the time where this can be inactivated.
Is Active	Select the check box if you want to activate the configuration in the system. If you don't select this check box, the configuration cannot be active in the system.
Save	Click this button to save the details and create the configuration in the system. An error message 'Record saved successfully' appears after you

Field Name	Description
	create the configuration.
Reset	Select this button to remove all the values entered and selected in all the fields.
Cancel	Click this button cancel the search process.

7.1.2.3 Editing Configurations

You can edit the configuration that you created or created by some other users. You need to access the alert by searching it before editing it. You need to access the Edit Configurations form from Search Results section.

Navigations

1. Search and identify alert from **Search Results** section. For more information on searching the alerts, refer to the Searching Configurations section. The **Search Results** table appears.

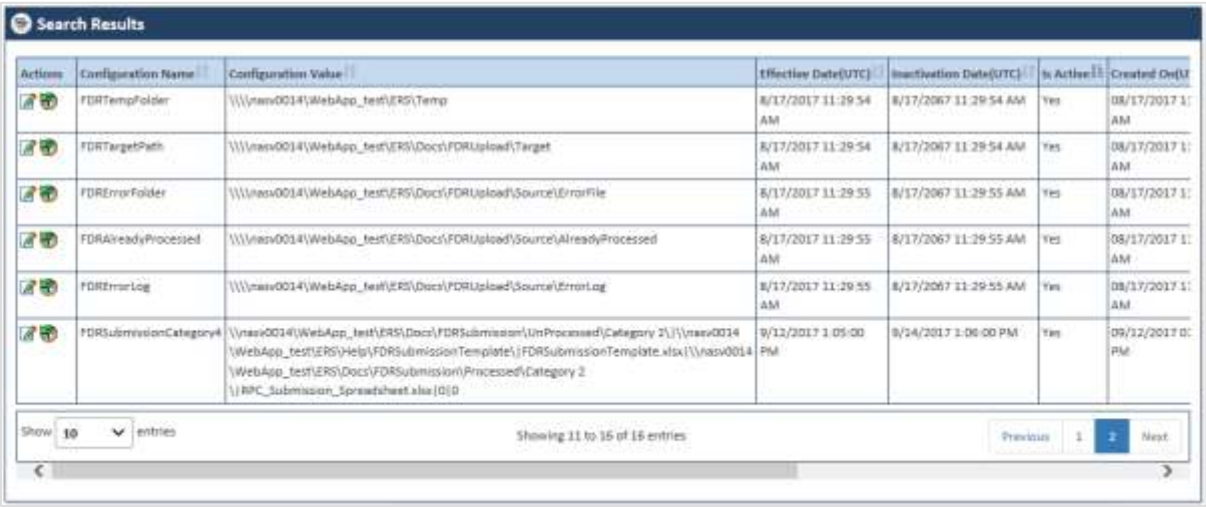


Figure 7-14: The Configurations Search Results

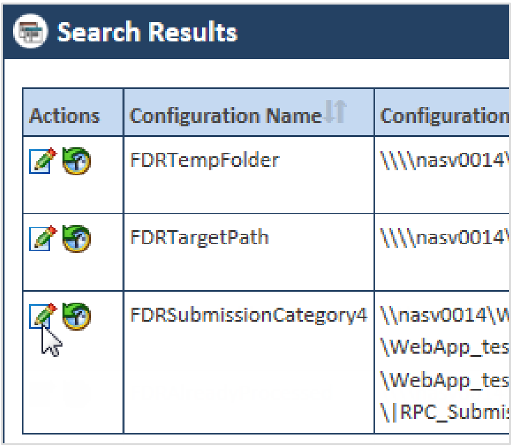


Figure 7-15: The Search Results> Action column

2. Go to the **Action** column and click the **Edit Configurations** icon. The **Edit Configurations** form appears.

Figure 7-16: The Edit Configurations form for editing

For more information on how to work on the configurations form, refer to Adding Configurations section.

If you save the **Edit Configurations** form without editing configuration details, a message **"No Changes done!"** appears.

7.1.2.4 Viewing Configurations History

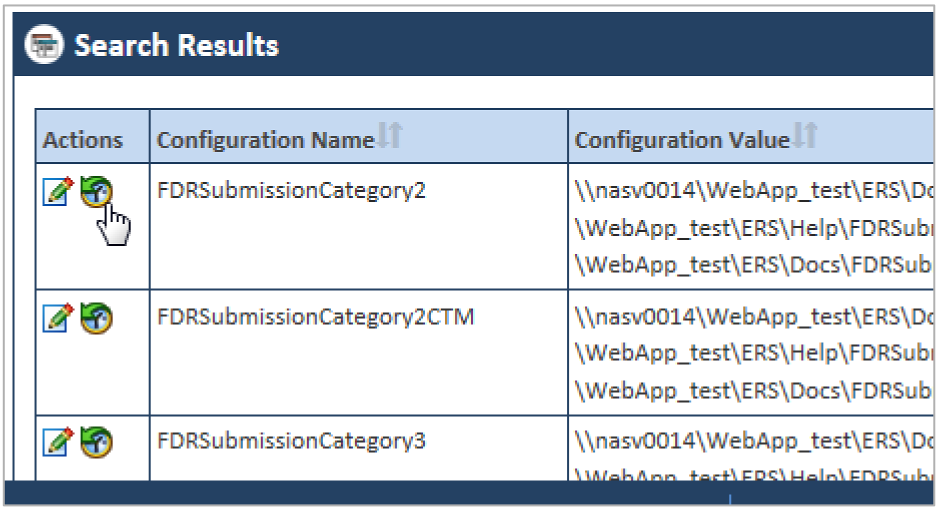


Figure 7-17: The Accessing Configuration History Report

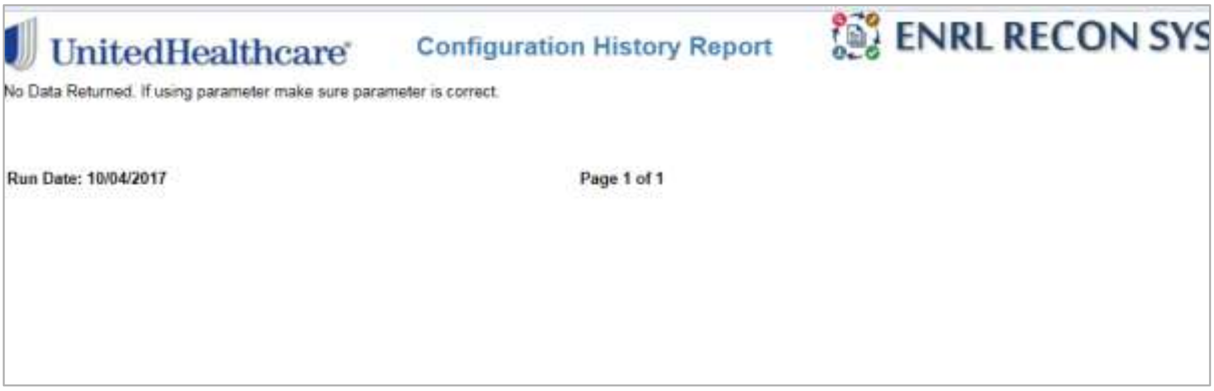


Figure 7-18: The Configuration History Report

7.1.3 Maintaining Departments

As an Administrator, you can maintain departments in the application which can be used throughout the application. You can create, update and delete department in the application.

You can use the **Add Departments** form to add departments. You can edit the departments using the **Edit Departments** form.

Before adding departments, you can search the configuration using the **Search Departments** form.

7.1.3.1 Searching Departments

Navigation:

To access the **Search Department** search window, go to the **Maintenance** menu and click the **Departments** sub-menus. The **Search Department** window appears.

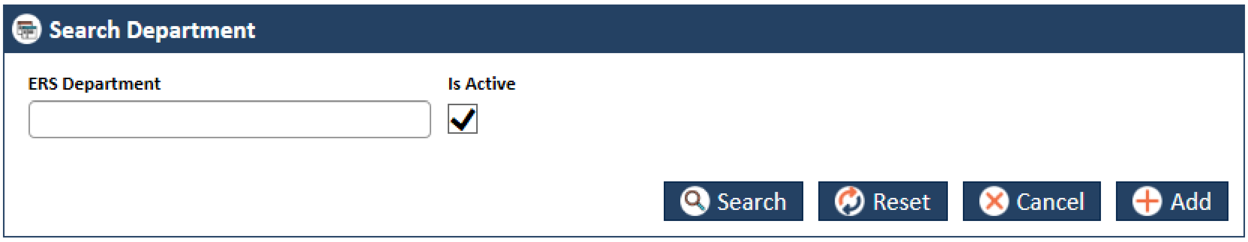


Figure 7-19: The Search Department search window

Field Name	Description
ERS Department	Enter the name of the departments that you want to search. If you search the departments without entering the name, all the active departments in the systems appears in the Search Results section.
Is Active	Select this check box if the departments are active in the application. If you don't select this checkbox, the department doesn't appear in the search result.
Search	Click this button to search the department in the application. The Search Result section appears with department that you entered in the ERS Department field.
Reset	Click this button to reset the search criteria.
Cancel	Click this button to cancel the search process.
Add	This button is required to add configuration.

7.1.3.1.1 The search results

If you search the department without entering the name, all the active department in the systems appears in the Search Results section.

Figure 7-20: The Departments Search Results

Figure 7-21: The Departments Multiple Search Results

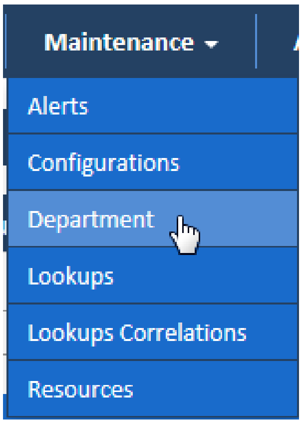
Field Name	Description
Actions	Click the required action icon to take proper action. Edit Skill: Click this icon to edit departments. The Edit Departments form window appears after you click this icon. View History: Click this icon to view the history.

Field Name	Description
ERS Department Name	Displays the name of the departments.
Effective Date(UTC)	Displayed the department effective date.
Inactivation Date(UTC)	Displayed the department inactivation date.
Is Active	Displays the value Yes, since all are active department.
Created On(UTC)	Displays the date when the department was created.
Created by	Displays the user name that created the department.
Last Updated On(UTC)	Displays the date when the department was last updated.
Last Updated by	Displays the user name that last updated the department.
LockedBy	Displays the user name that has locked the department.
LockedOn(UTC)	Displays the date when the locked the department.

7.1.3.2 Adding Departments

You can add and edit one or more departments in the system. You can create departments using the Department forms.

Navigation:



1. To access the **Department** search window, go to the **Maintenance** menu and click the **Department** sub-menu. The **Search Alerts** window appears.

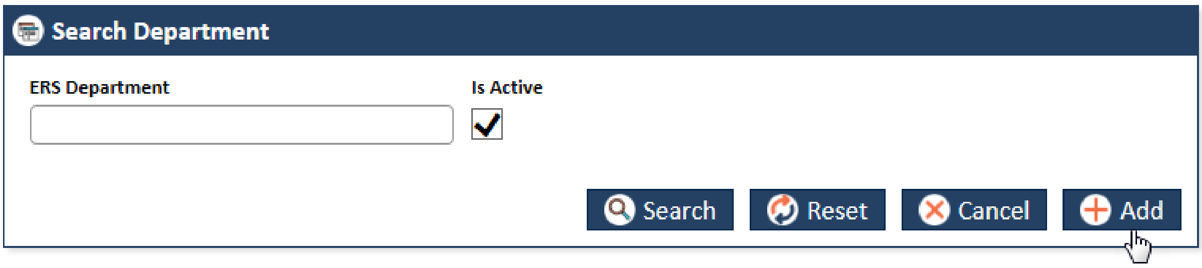


Figure 7-22: The Search Department Window> Adding Departments

2. Click the Add button. The Add Department form appears.

Figure 7-23: The Add Department Form

Field Name	Description

Field Name	Description
ERS Department Name	Value in this field auto populates in this field based on the value you select the Business Segment field.
Business Segment	Select the business segment in this field.
Effective Date	Select the date and time from which the configuration is effective.
Time Zone	Select the time zone where you want the configurations to be effective.
Inactivation Date	Select the date and time till which the configuration can be active in the system. This is required field if you don't select the value in the Is Active field. You must enter a future date in this field.
Time Zone	Select the time where this can be inactivated.
Is Active	Select the check box if you want to activate the department in the system. If you don't select this check box, the department cannot be active in the system.
Save	Click this button to save the details and create the department in the system. An error message 'Record saved successfully' appears after you create the department.
Reset	Select this button to remove all the values entered and selected in all the fields.
Cancel	Click this button cancel the search process.

7.1.3.3 Editing Departments

You can edit the configuration that you created or created by some other users. You need to access the alert by searching it before editing it. You need to access the **Edit Department** form from **Search Results** section.

Navigations

1. Search and identify alert from Search Results section. For more information on searching the alerts, refer to the Searching Departments section. Search Results appears.

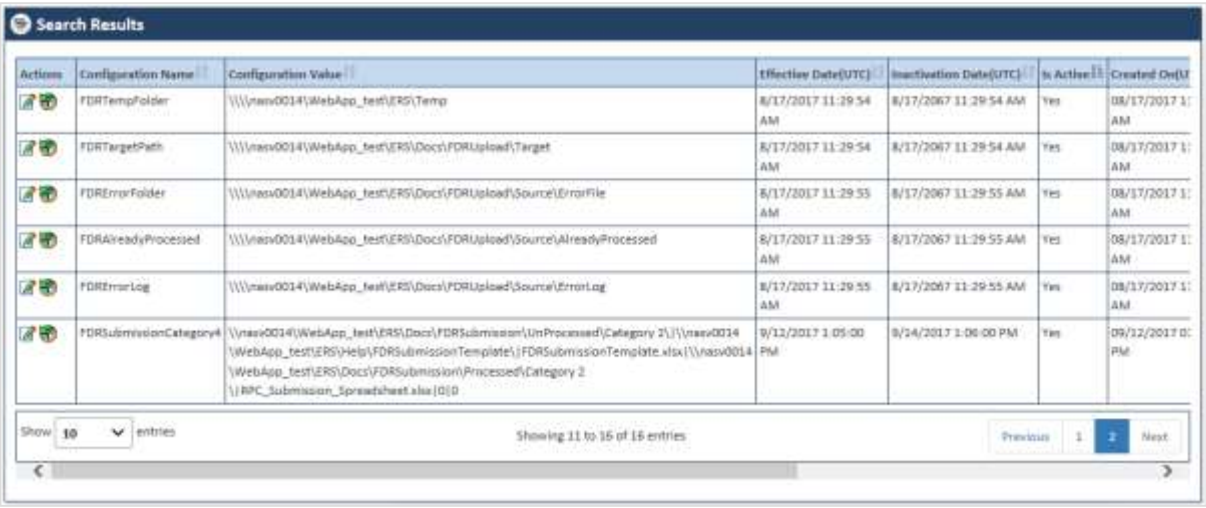
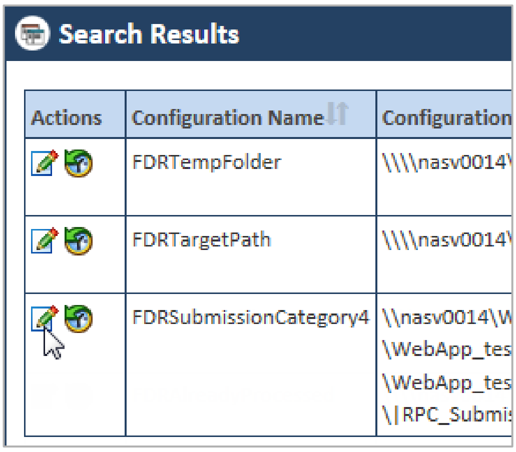


Figure 7-24: The Department Search Results



Actions	Configuration Name	Configuration
	FDRTempFolder	\\\\nasv0014\
	FDRTargetPath	\\\\nasv0014\
	FDRSubmissionCategory4	\\nasv0014\W \WebApp_tes \WebApp_tes \\|RPC_Submi

Figure 7-25: The Search Results> Action column

2. Go to the **Action** column and click the **Edit Department** icon. The **Edit Department** form appears.

Figure 7-26: The Edit Department form for editing

For more information on how to work on the configurations form, refer to Adding Configurations section.

7.1.3.4 Viewing Departments History

Actions	ERS Department Name	Effective Date(UTC)	Inactivation Date(UTC)
	M & R - Billing	8/1/2017 12:37:00 PM	8/18/2067 1:07:00 AM
	PCP - Billing	8/1/2017 12:37:15 PM	8/1/2067 12:37:15 PM
	M & R - Customer Service	8/1/2017 12:37:15 PM	8/1/2067 12:37:15 PM

Figure 7-27: Accessing Department History

Change Set ID	Last Updated On (UTC)	User Name	Field Name	Old Value	New Value
⊟ 18					
	8/2/2017 9:06:04 AM	Amit Thanki	Business Segment		
	8/2/2017 9:06:04 AM	Amit Thanki	Effective Date		
	8/2/2017 9:06:04 AM	Amit Thanki	ERS Department		
	8/2/2017 9:06:04 AM	Amit Thanki	Inactivation Date		
⊟ 19					
	8/2/2017 9:06:14 AM	Amit Thanki	Business Segment		M & R
	8/2/2017 9:06:14 AM	Amit Thanki	Effective Date		2017/08/01 12:37
	8/2/2017 9:06:14 AM	Amit Thanki	ERS Department		Billing
	8/2/2017 9:06:14 AM	Amit Thanki	Inactivation Date		2067/08/01 12:37
⊟ 158					

Figure 7-28: Department History Report

7.1.4 Maintaining Lookups

As an Administrator, you can maintain lookups in the application which can be used throughout the application. You can create, update and delete lookup in the application.

Look ups are the values available in the drop list boxes in the application. You can create lookup as a dropdown list and create list values in it.

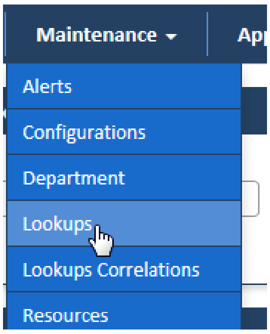
While creating the lookups, you can decided the sequence number of the lookup list values based on which a particular list value appears in the drop down list. For example, if you create lookup called Users, and list values such as ERS General User, Master Admin, and ENR Viewer under it, you can decide the sequence number for the list values. If you enter the sequence number value as 1 then this list item appears in the first position in the list.

You can use the **Lookup Type** form to add lookups. You can edit the departments using **Lookup Type** form.

Before adding departments, you can search the lookup using the **Search Lookup Type** form.

7.1.4.1 Searching Lookups

Navigation:



To access the **Search Lookup Type** search window, go to the **Maintenance** menu and click the **Lookup** sub-menus. The **Search Lookups Type** window appears along with **Search Results** section.

Figure 7-29: The Search Lookup Type search window

Field Name	Description
Description	Enter the name of the lookup that you want to search. If you search the lookup without entering the name, all the active lookups in the systems appear in the Search Results section.
Is Active	Select this check box if the lookups are active in the application. If you don't select this checkbox, the lookup doesn't appear in the search result.
Search	Click this button to search the lookup in the application. The Search Result section appears with lookup that you entered in the Description field.
Reset	Click this button to reset the search criteria.
Cancel	Click this button to cancel the search process.
Add	This button is required to add lookup.

7.1.4.1.1 The search results

If you search the lookup without entering the name, all the active lookups in the systems appear in the **Search Results** section.

Search Results

Actions	Description	Is Active	Created By	Created On(UTC)	Last Updated By	Last Updated On(UTC)	LockedBy	LockedOn(UTC)
	Reopen Action	Yes	Admin	09/04/2017 12:08 PM	Admin	09/04/2017 12:08 PM		

Show 10 entries Showing 1 to 1 of 1 entries Previous 1 Next

Figure 7-30: The Lookups Search Results

Search Results

Actions	Description	Is Active	Created By	Created On(UTC)	Last Updated By	Last Updated On(UTC)	LockedBy	LockedOn(UTC)
	Business Segment	Yes	Admin	07/31/2017 05:52 PM	Admin	07/31/2017 05:52 PM		
	Role	Yes	Admin	07/31/2017 05:52 PM	Admin	07/31/2017 05:52 PM		
	Work Basket	Yes	Admin	07/31/2017 05:52 PM	Admin	07/31/2017 05:52 PM		
	Timezone	Yes	Admin	07/31/2017 05:52 PM	Admin	07/31/2017 05:52 PM		
	State	Yes	Admin	07/31/2017 05:52 PM	Admin	07/31/2017 05:52 PM		
	Discrepancy Category	Yes	Admin	07/31/2017 05:52 PM	Admin	07/31/2017 05:52 PM		
	Discrepancy Type	Yes	Admin	07/31/2017 05:52 PM	Admin	07/31/2017 05:52 PM		
	Department	Yes	Admin	07/31/2017 05:52 PM	Admin	07/31/2017 05:52 PM		
	Queue Progress Type	Yes	Admin	07/31/2017 05:52 PM	Admin	07/31/2017 05:52 PM		
	Queue	Yes	Admin	07/31/2017 05:52 PM	Admin	07/31/2017 05:52 PM		

Show 10 entries Showing 1 to 10 of 50 entries Previous 1 2 3 4 5 Next

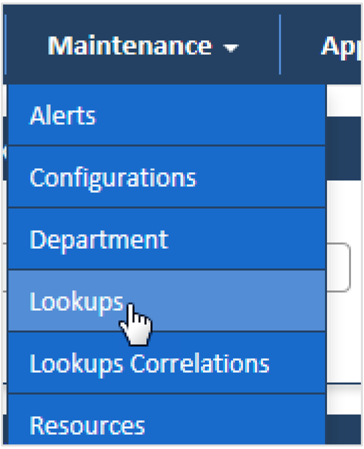
Figure 7-31: The Lookups Multiple Search Results

Field Name	Description
Actions	Click the required action icon to take proper action. • **Edit Lookup Types:** Click this icon to edit lookups. The **Edit Lookup** window appears after you click this icon. • **View Lookup Master**: Click this icon to view master lookups and add lookup values. • **View History:** Click this icon to view the history.
Descriptions	Displays the name of the lookups.
Is Active	Displays the value Yes, since all are active department.
Created by	Displays the user name that created the department.
Created On(UTC)	Displays the date when the department was created.
Last Updated by	Displays the user name that last updated the department.
Last Updated On(UTC)	Displays the date when the department was last updated.
LockedBy	Displays the user name that has locked the department.
LockedOn(UTC)	Displays the date when the locked the department.

7.1.4.2 Adding Lookups

You can add and edit one or more lookups in the system. You can create lookups using the Lookup Type forms.

Navigation:



1. To access the **Lookup Type** form, go to the **Maintenance** menu and click the **Lookups** sub-menu. The **Search Lookup Type** window appears.

Figure 7-32: The Search Lookups Window> Adding Lookups

2. Click the **Add** button. The **Lookup Type** form appears.

Figure 7-33: The Add Lookups Form

Field Name	Description
Description	Enter the name of the lookup or the dropdown list box name. Once you add the lookup, you can add lookup values using the Lookup Master table.
Save	Click this button to save the details and create the lookup in the system. An error message 'Record saved successfully' appears after you create the lookup.
Reset	Select this button to remove all the values entered and selected in all the fields.
Cancel	Click this button cancel the search process.

7.1.4.3 Editing Lookups

You can edit the lookup that you created. You need to access the lookups by searching it before editing it. You need to access the Edit Lookups form from Search Results section.

Navigations:

1. Search and identify lookup from Search Results section. For more information on searching the lookups, refer to the Searching Lookups section.

Figure 7-34: The Lookups Search Results

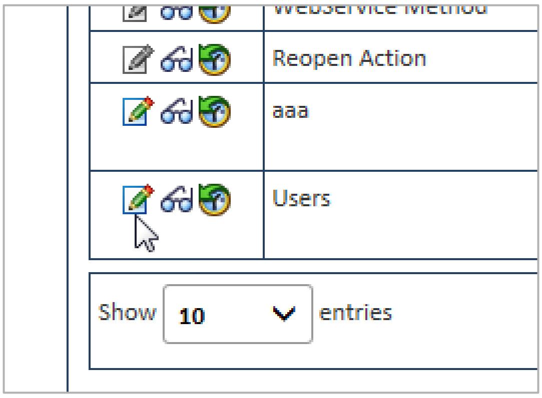


Figure 7-35: The Search Results> Action column

2. Go to the Action column and click the Edit Lookup Type icon. The Lookup Type form appears.

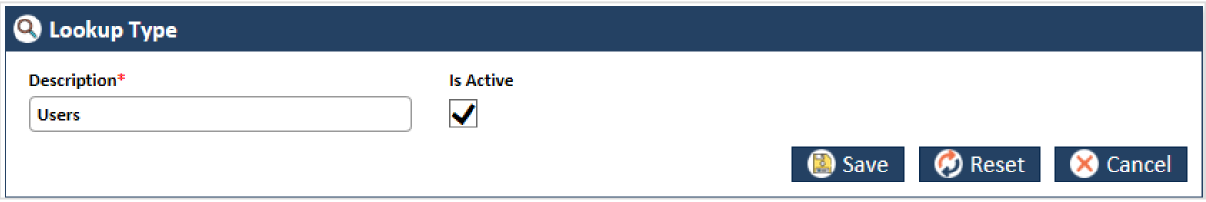


Figure 7-36: The Edit Lookups form for editing

You can do required changes and save the form. If you save the form without make any changes, an alert message, ‘There is no change in the form to update’ appears. For more information on how to work on the Lookup Type form, refer Adding Lookups section.

7.1.4.4 Adding/Editing Lookup values

You can add multiple lookup values under any lookup you have created. Lookup values are the list value in dropdown list box. Using the Add/Edit Lookup form in the Lookup Master form, you can add lookup values.

To access the Add/Edit Lookup form:

1. In the Search Results section identify the lookup in the Action column under which you want to create the lookup values.

Search Results

Actions	Description	Is Active	Created By	Created On(UTC)	Last Updated By	Last Updated On(UTC)	LockedBy	LockedOn(UTC)
	Import Status	Yes	Admin	09/04/2017 12:08 PM	Admin	09/04/2017 12:08 PM		
	Report Category	Yes	Admin	08/02/2017 10:16 AM	Admin	08/02/2017 10:16 AM		
	Transaction Type	Yes	Admin	08/16/2017 03:34 PM	Admin	08/16/2017 03:34 PM		
	Background Process Type	Yes	Admin	08/16/2017 03:34 PM	Admin	08/16/2017 03:34 PM		
	Error Module Name	Yes	Admin	08/29/2017 05:45 PM	Admin	08/29/2017 05:45 PM		
	WebService Status	Yes	Admin	09/04/2017 12:08 PM	Admin	09/04/2017 12:08 PM		
	WebService Method	Yes	Admin	09/04/2017 12:08 PM	Admin	09/04/2017 12:08 PM		
	Reopen Action	Yes	Admin	09/04/2017 12:08 PM	Admin	09/04/2017 12:08 PM		
	aaa	Yes	Ramani Behera	09/05/2017 07:50 AM	Ramani Behera	09/05/2017 07:50 AM		
	Users	Yes	Ramani Behera	09/13/2017 09:55 AM	Ramani Behera	09/13/2017 09:55 AM		

Show 10 entries Showing 41 to 50 of 50 entries Previous 1 2 3 4 5 Next

Figure 7-37: The Lookup Search Result

For more information on how to search lookups, refers to the Searching Lookups section.

2. Click the View Lookup Master icon to open the Lookup Master form.

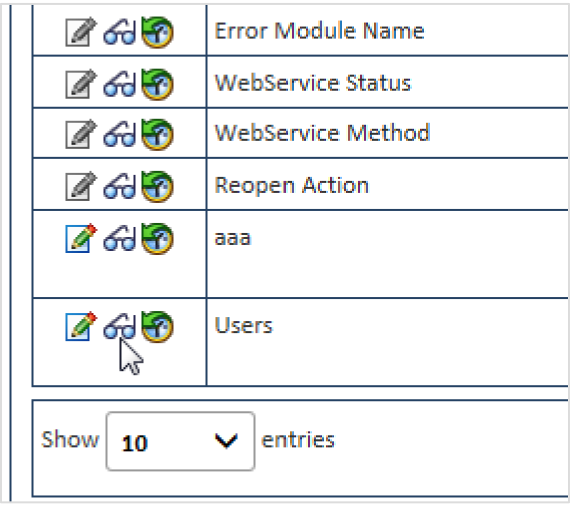
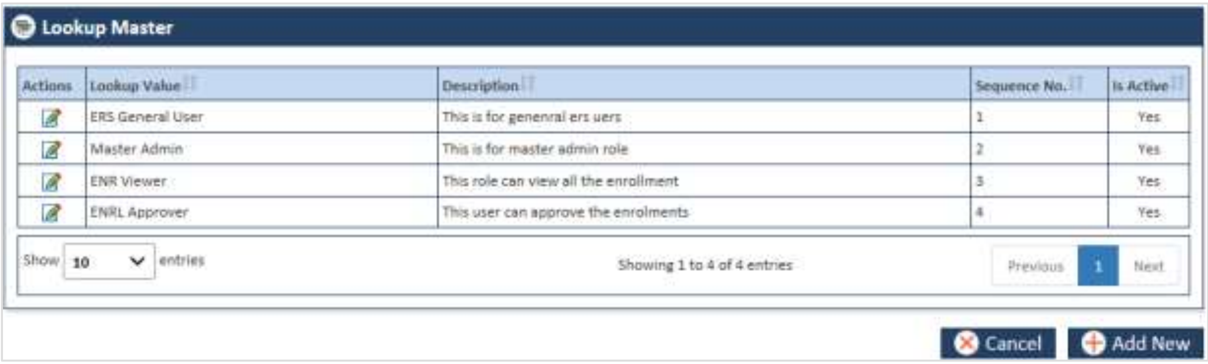


Figure 7-38: The View Lookup Master icon

The Lookup Master table appears.



Lookup Master

Actions	Lookup Value	Description	Sequence No.	Is Active
	ERS General User	This is for genenral ers uers	1	Yes
	Master Admin	This is for master admin role	2	Yes
	ENR Viewer	This role can view all the enrollment	3	Yes
	ENRL Approver	This user can approve the enrolments	4	Yes

Show 10 entries Showing 1 to 4 of 4 entries Previous 1 Next

Cancel Add New

Figure 7-39: The Lookup Master Table

If the table already has some lookup value it is displayed in the Lookup Value column.

3. Click the **Add New** button. The **Add/Edit Lookup** value form appears.

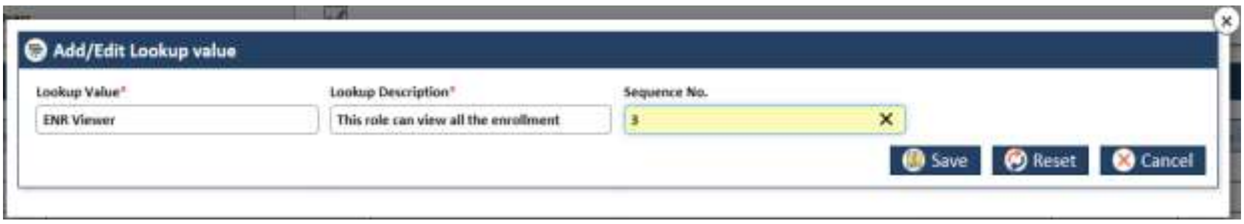


Figure 7-40: The Add/Edit Lookup value form

4. Enter the required field values in the form. To enter the required field values, refer to

7.1.4.5 Lookup Master

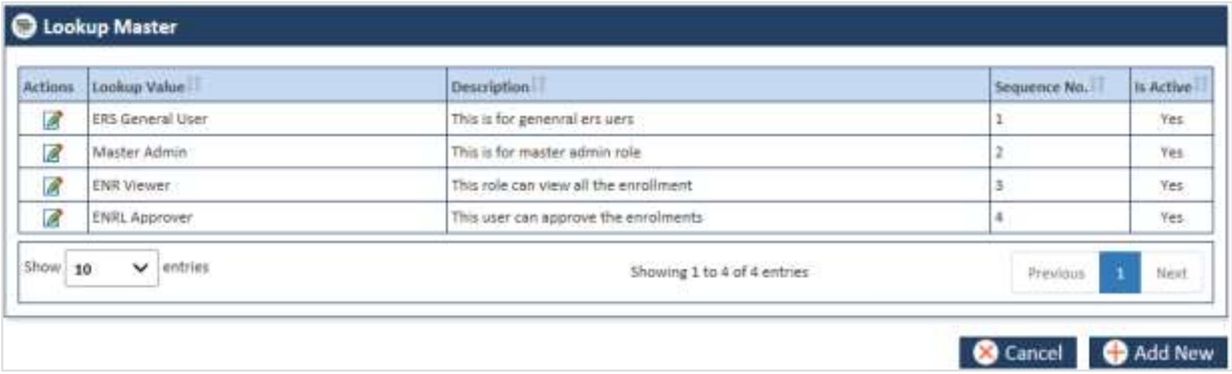


Figure 7-41: The Lookup Master Table

Field Name	Description
Actions	**Click the Edit Lookup Master** icon in this column to edit lookups in the Add/Edit Lookup value form. Add/Edit Lookup value form appears**.**
Lookup Value	Displays lookup value already entered in the system.
Description	Displays the description about the lookup values.
Sequence No.	Displays the sequence number.
Is Active	Displays the value **Yes**, if the lookup is active.

7.1.4.6 Adding Lookups

Figure 7-42: Adding/Editing Lookups

Field Name	Description
Lookup Value	Enter the lookup value that you want to create. This is one of the list items that can come under the lookup or dropdown field.
Lookup Description	Enter a description about the lookup value that you want to create.
Sequence No.	Enter a number in this field based on which the value appears in the sequence. For example, if you enter the value 3 in this field, then this lookup value appears in the third position.
Save	Click this button to save and create the lookup in the system.
Reset	Click this button to remove the entered the value.
Cancel	Click this button to cancel lookup creation process.

7.1.4.7 Editing Lookups

To edit the lookup values, you can use the Lookup Master table, and use the **Edit Lookup Master** icon to edit the lookup values.Record updated successfully.

Navigation:

1. Open the **Lookup Master** table by click the **View Lookup Master** icon in the **Action** column of the lookup **Search Result** table. The **Lookup Master** table appears.

Figure 7-43: The Lookup Master

2. Click the **Edit Lookup Master** icon in the **Action** column in line with the lookup value. The **Add/Edit Lookup** form appears.

3. To edit the **Add/Edit Lookup** form, refer to the Adding Lookups section.

7.1.4.8 Viewing Lookup Masters

7.1.5 Maintaining Lookup Correlations

As an Administrator, you can maintain lookup correlations in the application which can be used throughout the application. You can create, update and delete lookup correlations in the application.

Lookup correlation is the association and correlation of two lookups in the application. As an administrator you can create lookup correlation group and create parent and child lookups under it. Refer to the following example/scenario.

You can create a lookup called Workbasket under which you can add lookup values such OST, GPS vs MMR, and RPR. You can create one lookup called OST under which you can add look up values such OOA, SCC, and TRR. To create correlation between the two lookups you can create one lookup group (Work Basket Vs Discrepancy Category) where you have to decide Workbasket as parent lookup and Discrepancy Category as child lookup where you can add OOA, SCC, and TRR among other values in the child lookup. Now you can configure and correlate lookups in such a way that if you select the value OST in Workbasket lookup, the lookup values OOA, SCC, and TRR should appears in the Discrepancy Category lookup.

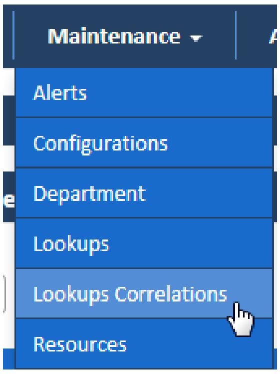
For more information, refer to the **Work Basket Vs Discrepancy Category** lookup correlation group.

Workbasket vs Discrepancy Category	
Workbasket	**Discrepancy Category**
OST	OOA
	SCC
	TRR
GPS vs MMR	Eligibility
	DOB
	Gender
RPR	RPR

Before adding departments, you can search the lookup using the **Search Lookup Type** form.

7.1.5.1 Searching Correlation Groups

Navigation:



To access the **Search Correlation** search window, go to the **Maintenance** menu and click the **Lookups Correlations** menus. The Search Correlation window appears along with **Search Results** section.

Figure 7-44: The Search Lookup Type search window

Field Name	Description
Correlation Group Name	Enter the name of the correlation group that you want to search. If you search the lookup without entering the name, all the active correlation group in the systems appears in the Search Results section.
Is Active	Select this check box if the correlation groups are active in the application. If you don't select this checkbox, the correlation group doesn't appear in the search result.
Search	Click this button to search the lookup in the application. The **Search Result** section appears with correlation group that you entered in the **Correlation Group Name** field.
Reset	Click this button to reset the search criteria.
Cancel	Click this button to cancel the search process.
Add	This button is required to add correlation group.

7.1.5.1.1 The search results

If you search the lookup without entering the name, all the active correlation groups in the systems appear in the Search Results section.

Figure 7-45: The Correlation Group Search Results

Search Results

Actions	Correlation Group Name	Parent Lookup Type	Child Lookup Type	Is Active	Created By	Created On(UTC)	Last Updated By	Last Updated On(UTC)	LockedBy	LockedOn
	Work Basket Vs Discrepancy Category	Work Basket	Discrepancy Category	Yes	Admin	07/31/2017 05:59 PM	Admin	07/31/2017 05:59 PM		9/14/201 1:29:53 P
	Discrepancy Category Vs Discrepancy Type	Discrepancy Category	Discrepancy Type	Yes	Admin	07/31/2017 05:59 PM	Admin	07/31/2017 05:59 PM		9/14/201 1:29:53 P
	Discrepancy Category Vs Queue	Discrepancy Category	Queue	Yes	Admin	07/31/2017 05:59 PM	Admin	07/31/2017 05:59 PM		9/14/201 1:29:53 P
	Queue Vs Action	Queue	Action	Yes	Admin	07/31/2017 05:59 PM	Admin	07/31/2017 05:59 PM		9/14/201 1:29:53 P
	Discrepancy Category Vs Action Vs Resolution	Action	Resolution	Yes	Admin	07/31/2017 05:59 PM	Admin	07/31/2017 05:59 PM		9/14/201 1:29:53 P
	Discrepancy Category Vs Action Vs Root Cause	Action	Root Cause	Yes	Admin	07/31/2017 05:59 PM	Admin	07/31/2017 05:59 PM		9/14/201 1:29:53 P
	Testing 3	Action	Action Requested	Yes	Abhijit Dey	08/03/2017 11:10 AM	Abhijit Dey	08/03/2017 11:14 AM		9/14/201 1:29:53 P

Show 10 entries Showing 1 to 10 of 11 entries Previous 1 2 Next

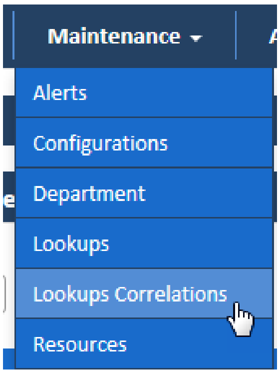
Figure 7-46: The Correlation Group Search Results

Field Name	Description
Actions	Click the required action icon to take proper action. • **Edit Correlation Types**: Click this icon to edit correlation group. The **Edit Lookup** window appears after you click this icon. • **View Correlation Master**: Click this icon to view correlation master lookups and add correlation master values. • **History Lookup Master**: Click this icon to view the history.
Correlation Group Name	Displays the correlation group name.
Parent Lookup Type	Displays the parent lookup type name.
Child Lookup Type	Displays the child lookup type name
Is Active	Displays the value Yes, since all are active correlation group.
Created by	Displays the user name that created the correlation group.
Created On(UTC)	Displays the date when the correlation group was created.
Last Updated by	Displays the user name that last updated the correlation group.
Last Updated On(UTC)	Displays the date when the correlation group was last updated.
LockedBy	Displays the user name that has locked the correlation group.
LockedOn(UTC)	Displays the date when the locked the correlation group.

7.1.5.2 Adding Correlation Groups

You can add and edit one or more correlation group in the system. You can create correlation groups using the Correlation Type form. While creating lookup group, you can decide the parent lookup under which you can add child lookup.

Navigation:



1. To access the **Correlation Type** form, go to the **Maintenance** menu and click the **Lookups Correlations** sub-menu. The **Search Correlation** window appears.

Figure 7-47: The Search Correlation Window> Adding Lookups

2. Click the **Add** button. The **Correlation Type** form appears.

Figure 7-48: The Add Correlation Form

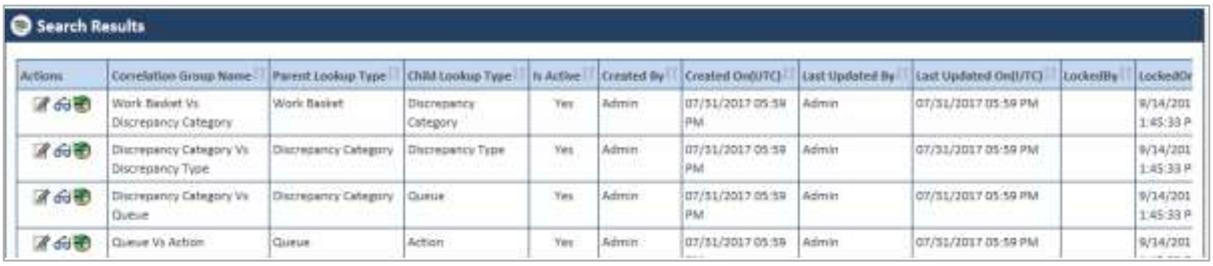
Field Name	Description
Correlation Name	Enter the name of the correlation group. Once you add the correlation, you can decide the Parent look and child lookup the parent lookup using the **Correlation Master** table.
Parent Lookup Type	Select the parent lookup value in this field. This is one lookup under which associated look values appears. If OST is the workbasket, under this you can have OOA, SSC, and TRR as child values.
Child Lookup Type	Select the child lookup value in this field. This is one lookup that belongs to one parent lookup. If OST is the workbasket, under this you can have OOA, SSC, and TRR as child lookups.
Save	Click this button to save the details and create the correlation in the system. An error message ‘Record saved successfully’ appears after you create the correlation.
Reset	Select this button to remove all the values entered and selected in all the fields.
Cancel	Click this button cancel the search process.

7.1.5.3 Editing Correlation Groups

You can edit the correlation group that you created. You need to access the **Correlation Groups** form by searching it before editing it. You need to access the **Edit Correlation** form from **Search Results** section.

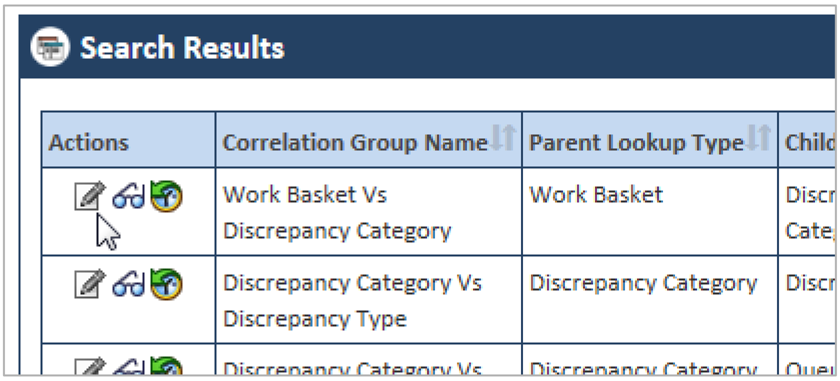
Navigations:

1. Search and identify correlation group from Search Results section. For more information on searching the lookups, refer to the Searching Correlation Groups section.



Actions	Correlation Group Name	Parent Lookup Type	Child Lookup Type	Is Active	Created By	Created On(UTC)	Last Updated By	Last Updated On(UTC)	LockedBy	LockedOn
	Work Basket Vs Discrepancy Category	Work Basket	Discrepancy Category	Yes	Admin	07/31/2017 05:59 PM	Admin	07/31/2017 05:59 PM		9/14/201 1:45:33 P
	Discrepancy Category Vs Discrepancy Type	Discrepancy Category	Discrepancy Type	Yes	Admin	07/31/2017 05:59 PM	Admin	07/31/2017 05:59 PM		9/14/201 1:45:33 P
	Discrepancy Category Vs Queue	Discrepancy Category	Queue	Yes	Admin	07/31/2017 05:59 PM	Admin	07/31/2017 05:59 PM		9/14/201 1:45:33 P
	Queue Vs Action	Queue	Action	Yes	Admin	07/31/2017 05:59	Admin	07/31/2017 05:59 PM		9/14/201

Figure 7-49: The Correlation Search Results



Search Results

Actions	Correlation Group Name	Parent Lookup Type	Child
	Work Basket Vs Discrepancy Category	Work Basket	Discr Cate
	Discrepancy Category Vs Discrepancy Type	Discrepancy Category	Discr
	Discrepancy Category Vs	Discrepancy Category	Queu

Figure 7-50: The Search Results> Action column

2. Go to the Action column and click the Edit Correlation Type icon. The Correlation Type form appears.

Figure 7-51: The Edit Correlation form for editing

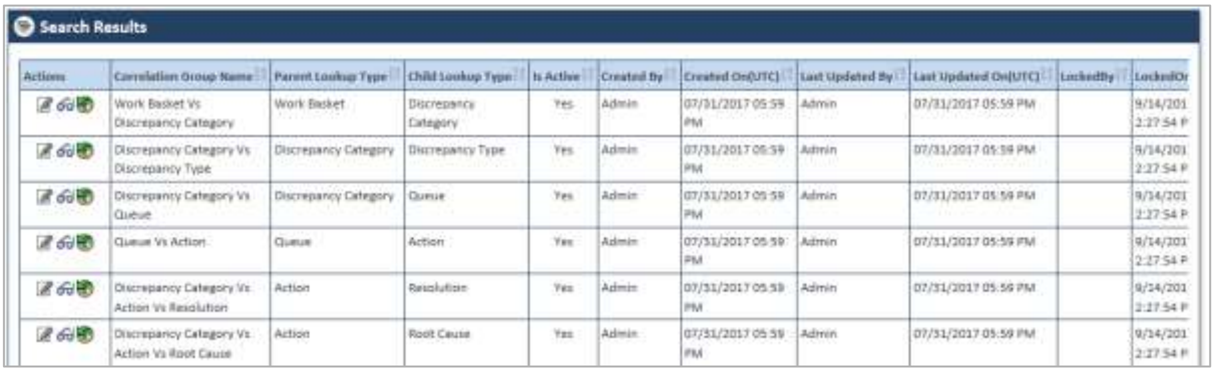
You can do required changes and save the form. If you save the form without make any changes, an alert message, 'There is no change in the form to update' appears. For more information on how to work on the Correlation Type form, refer Adding Correlation Groups section.

7.1.5.4 Adding/Editing Correlation Master table

You can add and edit the correlation group and add multiple parent and child lookups in it. Using the **Add/Edit** correlation value form in the **Correlation Master** form, you can add parent and child lookups.

To access the **Add/Edit Correlation** form:

1. In the **Search Results** section identify the correlation in the **Action** column under which you want to add the lookups.



Search Results

Actions	Correlation Group Name	Parent Lookup Type	Child Lookup Type	Is Active	Created By	Created On(UTC)	Last Updated By	Last Updated On(UTC)	LockedBy	LockedOn
	Work Basket Vs Discrepancy Category	Work Basket	Discrepancy Category	Yes	Admin	07/31/2017 05:59 PM	Admin	07/31/2017 05:59 PM		9/14/201 2:27:54 P
	Discrepancy Category Vs Discrepancy Type	Discrepancy Category	Discrepancy Type	Yes	Admin	07/31/2017 05:59 PM	Admin	07/31/2017 05:59 PM		9/14/201 2:27:54 P
	Discrepancy Category Vs Queue	Discrepancy Category	Queue	Yes	Admin	07/31/2017 05:59 PM	Admin	07/31/2017 05:59 PM		9/14/201 2:27:54 P
	Queue Vs Action	Queue	Action	Yes	Admin	07/31/2017 05:59 PM	Admin	07/31/2017 05:59 PM		9/14/201 2:27:54 P
	Discrepancy Category Vs Action Vs Resolution	Action	Resolution	Yes	Admin	07/31/2017 05:59 PM	Admin	07/31/2017 05:59 PM		9/14/201 2:27:54 P
	Discrepancy Category Vs Action Vs Root Cause	Action	Root Cause	Yes	Admin	07/31/2017 05:59 PM	Admin	07/31/2017 05:59 PM		9/14/201 2:27:54 P

Figure 7-52: The Correlation Search Result

For more information on how to search lookups, refers to the Searching Correlation Groups section.

2. Click the View Correlation Master icon to open the Correlation Master form.

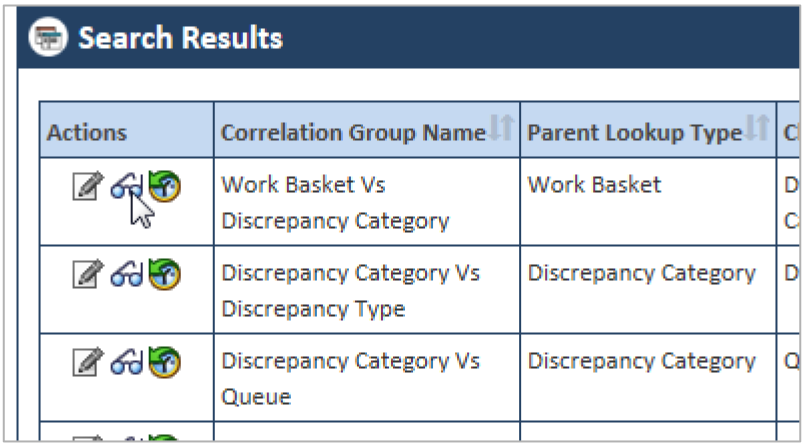


Figure 7-53: The View Correlation Master icon

The **Correlation Master** table appears.

Figure 7-54: The Correlation Masters Table

If the table already has some parent and child lookups, these are displayed in the Parent Lookup Master and Child Lookup Master columns, respectively.

3. Click the Add New button. The Add/Edit Correlation value form appears.

Figure 7-55: The Add/Edit correlation value form

4. Enter the required field values in the form. To enter the required field values, refer to Adding Correlations section.

7.1.5.5 Correlation Master Table

Figure 7-56: The Correlation Master Table

Field Name	Description
Actions	**Click the** **Edit Correlation Master** icon in this column to edit correlation in the **Add/Edit Correlation** value form. Add/Edit Correlation value form appears**.**
Description	Displays correlation value already entered in the system.
Parent Lookup Master	Displays the parent lookup master values.
Child Lookup Master	Displays the child lookup master values.
Is Active	Displays the value **Yes**, if the correlation is active.

7.1.5.6 Adding Correlations

Figure 7-57: Adding/Editing Lookups

Field Name	Description
Correlation Group	Enter the correlation name that you want to create. This is one of the list items that can come under the lookup or dropdown field.
Parent Lookup Master	Select parent lookup master values. The child lookup value comes under the parent lookup values.
Child Lookup Master	Select the child lookup master values. The values added in this field can appear in the parent lookup field.
Save	Click this button to save and create the correlation in the system.
Reset	Click this button to remove the entered the value.
Cancel	Click this button to cancel lookup creation process.

7.1.5.7 Viewing History lookup Correlation

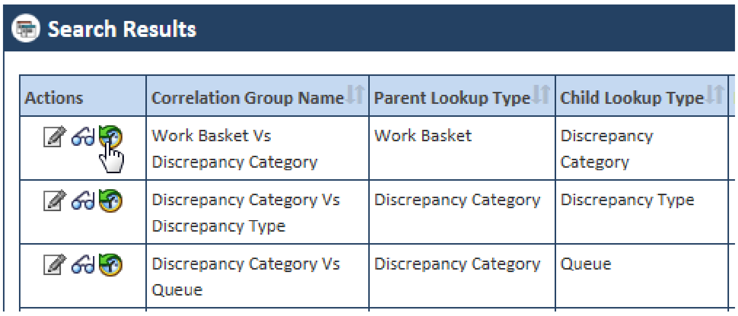
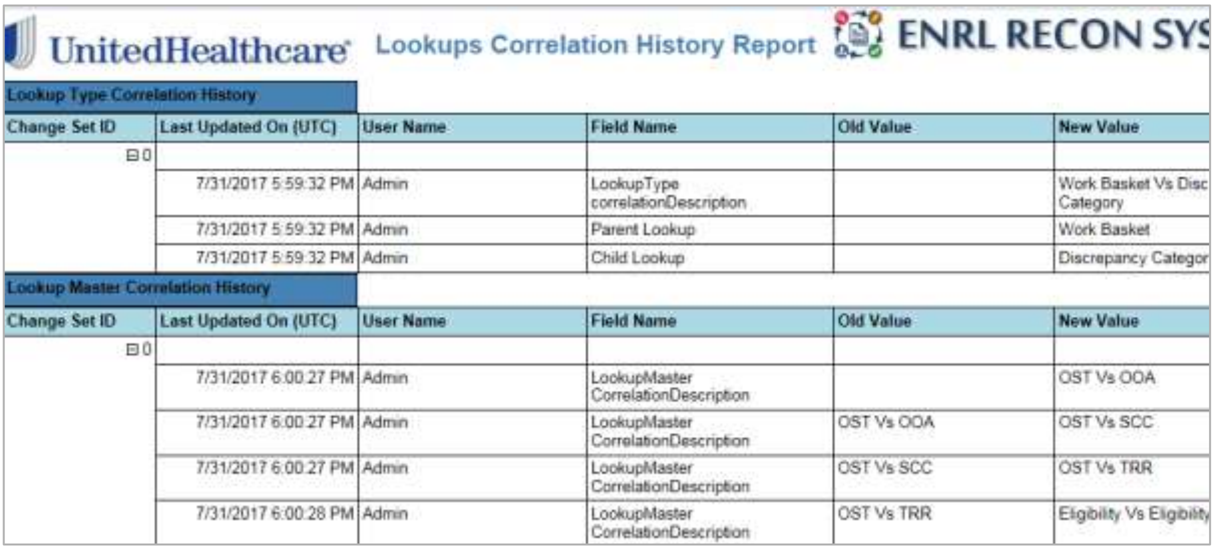


Figure 7-58: Accessing History Lookup Correlation form



Lookup Type Correlation History					
Change Set ID	Last Updated On (UTC)	User Name	Field Name	Old Value	New Value
⊟ 0					
	7/31/2017 5:59:32 PM	Admin	LookupType correlationDescription		Work Basket Vs Disc Category
	7/31/2017 5:59:32 PM	Admin	Parent Lookup		Work Basket
	7/31/2017 5:59:32 PM	Admin	Child Lookup		Discrepancy Categor

Lookup Master Correlation History					
Change Set ID	Last Updated On (UTC)	User Name	Field Name	Old Value	New Value
⊟ 0					
	7/31/2017 6:00:27 PM	Admin	LookupMaster CorrelationDescription		OST Vs OOA
	7/31/2017 6:00:27 PM	Admin	LookupMaster CorrelationDescription	OST Vs OOA	OST Vs SCC
	7/31/2017 6:00:27 PM	Admin	LookupMaster CorrelationDescription	OST Vs SCC	OST Vs TRR
	7/31/2017 6:00:28 PM	Admin	LookupMaster CorrelationDescription	OST Vs TRR	Eligibility Vs Eligibility

Figure 7-59: The Lookup Correlation History

7.1.6 Maintaining Resources

As an Administrator, you can maintain resources in the application which can be used throughout the application and can be displayed in the home page. You can create, update and delete resources in the application.

The resource in ERS application refers to the required documents or reference documents that are available in the application home page or in the application.

You can use the Add Resources and Edit Resources form to add and edit resources, respectively.

Before adding resources, you can search the resources using the Search Resources form.

7.1.6.1 Searching Resources

Navigation:

To access the **Search Resources** search window, go to the **Maintenance** menu and click the **Departments** menu. The **Search Resources** window appears.

Figure 7-60: The Search Resources search window

Field Name	Description
Name	Enter the name of the resource that you want to search. If you search the resource without entering the name, all the active al resources in the systems appears in the Search Results section.
Description	Enter a description about the resource that you want to search. If you search the resource without entering the name, all the active resource in the systems appears in the **Search Results** section.
Is Active	Select this check box if the resources are active in the application. If you don't select this checkbox, the resource doesn't appear in the search result.
Search	Click this button to search the resource in the application. The **Search Result** section appears with resource that you entered in the **Name** field.
Reset	Click this button to reset the search criteria.
Cancel	Click this button to cancel the search process.

Field Name	Description
Add	This button is required to add configuration.

7.1.6.1.1 The search results

If you search the resource without entering the name, all the active resource in the systems appears in the Search Results section.

Figure 7-61: The Resource Search Results

Figure 7-62: The Departments Multiple Search Results

Field Name	Description
Actions	Click the required action icon to take proper action. • **Edit Skill**: Click this icon to edit resources. The **Resourc**e form window appears after you click this icon. • **View History:** Click this icon to view the history.
ERS Department Name	Displays the name of the resource.
Description	Displays the description about the resource.
Is Active	Displays the value **Yes**, since all are active department.
Effective Date(UTC)	Displayed the resource effective date.
Inactivation Date(UTC)	Displayed the resource inactivation date.
Created On(UTC)	Displays the date when the resource was created.
Created by	Displays the user name that created the resource.
Last Updated On(UTC)	Displays the date when the resource was last updated.
Last Updated by	Displays the user name that last updated the resource.
LockedBy	Displays the user name that has locked the resource.
LockedOn(UTC)	Displays the date when the locked the resource.

7.1.6.2 Adding Resources

You can add and edit one or more resource in the system. You can create resources using the Resource form.

Navigation:

1. To access the Search Resources search window, go to the **Maintenance** menu and click the **Resources** menu. The Search Resources window appears.

Figure 7-63: The Search Resources Window> Adding Resources

2. Click the **Add New** button.

The **Resource** form appears. Enter the details in the **Resource** form.

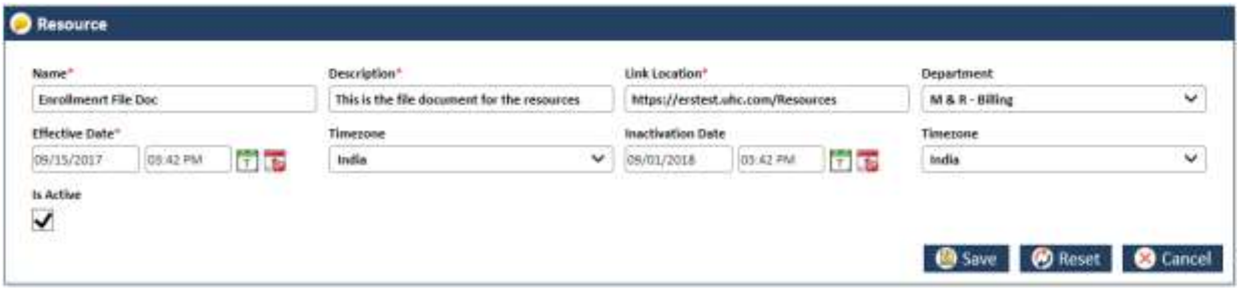


Figure 7-64: The Resource Form

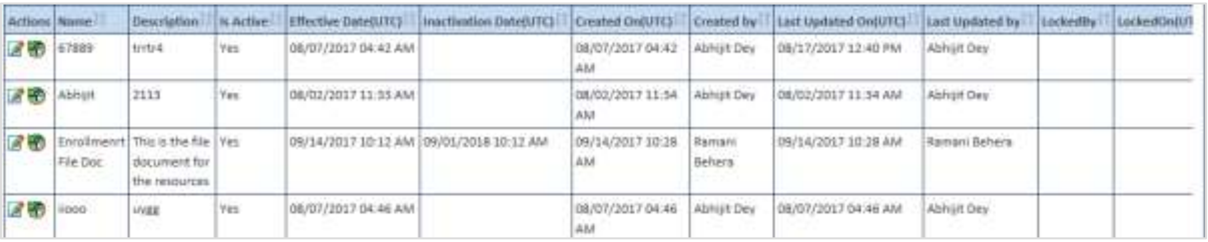
Field Name	Description
Name	Enter a name for the resource that you want to create.
Description	Enter a description about the resource that you want to create.
Link Location	Enter the link of the location or the URL.
Department	Select the name of the department for which you want to create the resources.
Effective Date	Select the date and time from which the resource is effective.
Timezone	Select the time zone where you want the resource to be effective.
Inactivation Date	Select the date and time till which the configuration can be active in the system. This is a required field if you don't select the value in the **Is Active** field. You must enter a future date in this field.
Timezone	Select the time where this resource can be inactivated.
Is Active	Select the check box if you want to activate the resource in the system. If you don't select this check box, the resource cannot be activated in the system.
Save	Click this button to save the details and create the resource in the system. An error message 'Record saved successfully' appears after you create the resource.
Reset	Select this button to remove all the values entered and selected in all the fields.
Cancel	Click this button cancel the search process.

7.1.6.3 Editing Resources

You can edit the resources that you created. You need to access the resource by searching it before editing it. You need to access the Edit Resources form from Search Results section.

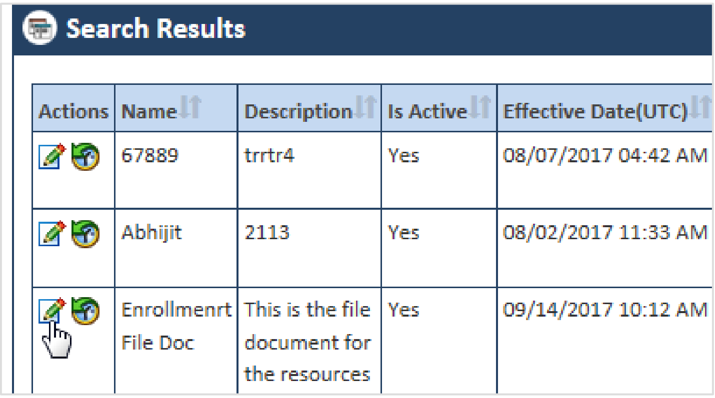
Navigations

1. Search and identify alert from Search Results section. For more information on searching the alerts, refer to the Searching Resources section. Search Results appears.



Actions	Name	Description	Is Active	Effective Date(UTC)	Inactivation Date(UTC)	Created On(UTC)	Created by	Last Updated On(UTC)	Last Updated by	LockedBy	LockedOn(UT
	67889	trrtr4	Yes	08/07/2017 04:42 AM		08/07/2017 04:42 AM	Abhijit Dey	08/17/2017 12:40 PM	Abhijit Dey		
	Abhijit	2113	Yes	08/02/2017 11:33 AM		08/02/2017 11:54 AM	Abhijit Dey	08/02/2017 11:34 AM	Abhijit Dey		
	Enrollmenrt File Doc	This is the file document for the resources	Yes	09/14/2017 10:12 AM	09/01/2018 10:12 AM	09/14/2017 10:28 AM	Ramani Behera	09/14/2017 10:28 AM	Ramani Behera		
	iiooo	uvgg	Yes	08/07/2017 04:46 AM		08/07/2017 04:46 AM	Abhijit Dey	08/07/2017 04:46 AM	Abhijit Dey		

Figure 7-65: The Resource Search Results



Search Results

Actions	Name	Description	Is Active	Effective Date(UTC)
	67889	trrtr4	Yes	08/07/2017 04:42 AM
	Abhijit	2113	Yes	08/02/2017 11:33 AM
	Enrollmenrt File Doc	This is the file document for the resources	Yes	09/14/2017 10:12 AM

Figure 7-66: The Search Results> Action column

2. Go to the Action column and click the Resource icon. The Resource form appears.

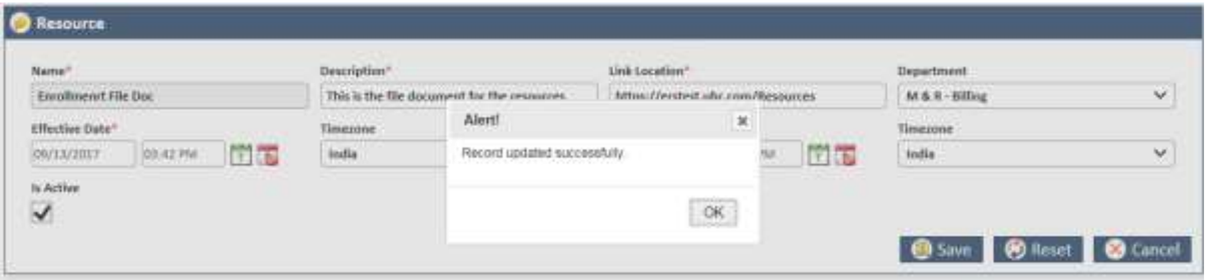
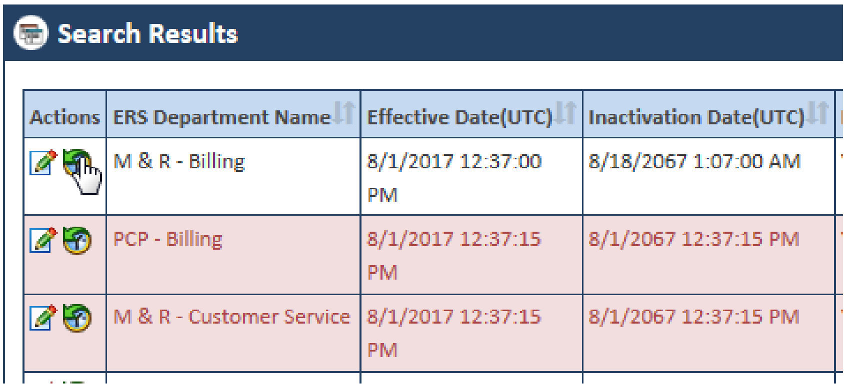


Figure 7-67: The Resource form for editing

For more information on how to work on the resources form, refer to Adding Resources section.

7.1.6.4 Viewing Departments History



Search Results

Actions	ERS Department Name	Effective Date(UTC)	Inactivation Date(UTC)
	M & R - Billing	8/1/2017 12:37:00 PM	8/18/2067 1:07:00 AM
	PCP - Billing	8/1/2017 12:37:15 PM	8/1/2067 12:37:15 PM
	M & R - Customer Service	8/1/2017 12:37:15 PM	8/1/2067 12:37:15 PM

Figure 7-68: The Search Results

UnitedHealthcare **Department History Report** **ENRL RECON SYS**

Change Set ID	Last Updated On (UTC)	User Name	Field Name	Old Value	New Value
⊟ 18					
	8/2/2017 9:06:04 AM	Amit Thanki	Business Segment		
	8/2/2017 9:06:04 AM	Amit Thanki	Effective Date		
	8/2/2017 9:06:04 AM	Amit Thanki	ERS Department		
	8/2/2017 9:06:04 AM	Amit Thanki	Inactivation Date		
⊟ 19					
	8/2/2017 9:06:14 AM	Amit Thanki	Business Segment		M & R
	8/2/2017 9:06:14 AM	Amit Thanki	Effective Date		2017/08/01 12:37
	8/2/2017 9:06:14 AM	Amit Thanki	ERS Department		Billing
	8/2/2017 9:06:14 AM	Amit Thanki	Inactivation Date		2067/08/01 12:37
⊟ 158					
	8/7/2017 6:37:48 AM	Abhijit Dey	Inactivation Date	2067/08/01 12:37	2067/08/01 01:07
⊟ 298					
	8/24/2017 12:01:20 PM	Shaik Mahaboob Basha	Inactivation Date	2067/08/01 01:07	2067/08/18 01:07

Run Date: **10/04/2017** **Page 1 of 1**

Figure 7-69: The Department History Report

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Chapter 8 Reports

This chapter provides all the details about various reports available in the ERS application. It also discusses the types of reports, methods to access report and contents the reports contain.

The chapter contains the following sections:

- Report Overview
- Types of Reports
- Accessing ERS Reports
- ERS Reports
- Report Controls

8.1 Report Overview

A report is organized presentation of information and graphical account of something that has gone a thorough observation or investigation. This is a piece of information which is a pictorial representation of the in-progress, completed and the assigned tasks and activities performed in a system. Report helps you get the detailed status of a particular work in the application so that you can plan, analize, and execute your tasks accordingly.

The ERS application has multiple reports that represent various statuses or progress of the activities performed in the application, for all the work baskets. Based on the report logic and code developed, the report can be accessed by all ERS users. Users can access, create, save, print and export pre-defined reports using the **Reports** subsystem or menu. The **Reports** menu allows users to specify search criteria to search the reports, such as a date range, individual analyst's information, discrepancy category etc.

8.1.1 Types of Reports

ERS reports are broadly divided into three types based on the contents they contain and their access locations. Some of the reports are accessed from the **Reports** menu, some are accessed from the **Search Results** tables and others are from the queue summary pages.

8.1.1.1 Standard Reports

These reports are the typical reports generally available in the **Reports** menu of the ERS application. These reports usually provide details about various statuses, metrics, error logs, audit quality and dashboard reports details. While other reports are accessed from search results and various pages, standard reports are generated by providing search criteria and report names.

8.1.1.2 Queue Summary Reports

These are called queue summary reports as these are accessed from the **<Discrepancy Name> Queue Summary** page of the application. You can access these reports from all the queue summary pages such as OOA, SCC, TRR, Eligibility, BOD, Gender and RPR Queue Summary pages. You can locate the reports under the **Actions** column in line with the Processing Queues, Holding Queues and Completed Queues.

8.1.1.3 History Reports

These are called history reports because they comprise all the historical facts and details of activities performed for a particular case or record. These reports are accessible from the all the records available in the **Search Result** section. These reports provide details about the records such as the name of the queue or discrepancy, administration, and maintenance related activities.

8.2 Working on the Reports

You can access and generate the reports to view the current work status or record details. This provides various details based on which you can plan your tasks or activities. Before getting the details of the report, you must be acquainted with the processes of the accessing the reports and searching.

8.2.1 Accessing ERS Reports

Report access methods are different for different reports.

8.2.1.1 Accessing Standard Reports

To access the standard reports:

1. Go to and click the **Report** menu.

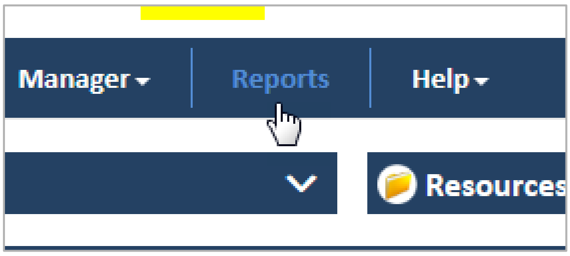


Figure 8-1: The Reports Menu

The **Generate Report** search window appears with a free space where the report can be displayed.

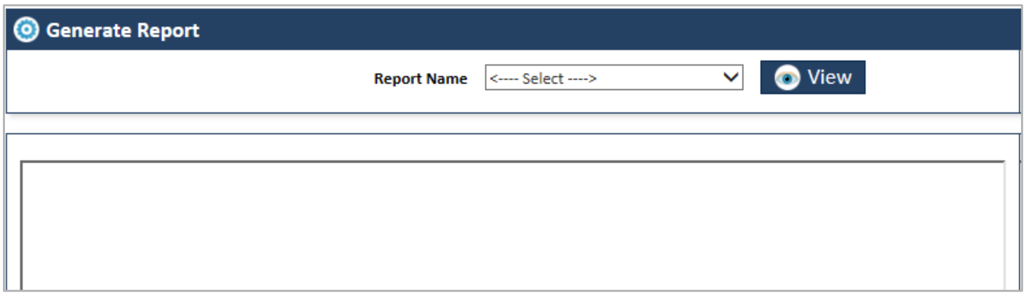


Figure 8-2: The Generate Report Search Window

2. Go to the **Report Name** dropdown list box. This displays all the reports listed.
3. Select a particular report from the list. The report gets selected.

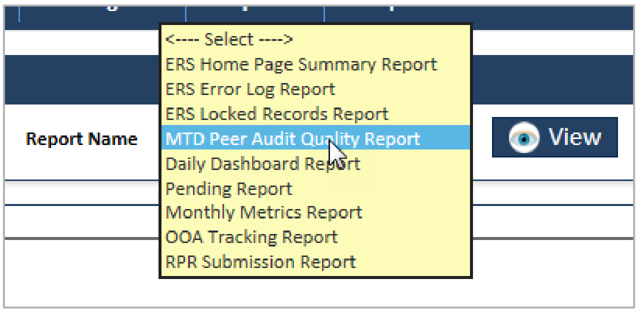


Figure 8-3: Report Name Window> Selecting Report Name

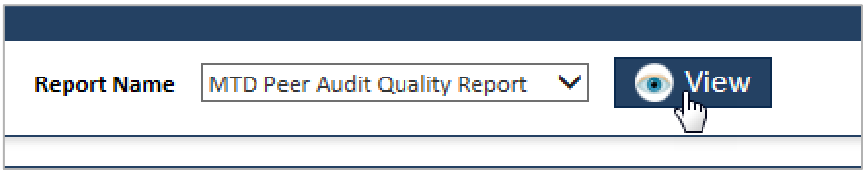


Figure 8-4: The Report View button

4. Click the **View** button. The **Month Date**, **Discrepancy Category** fields and **View Report** button

appear.

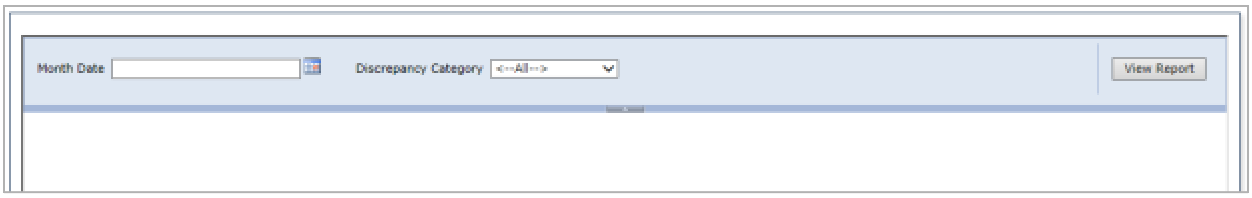


Figure 8-5: Report Filers

> ***Note**: Ideally the report is generated if the **View** button is clicked after selecting the report name in the **Report Name** field. However, for many report, some additional field values are required such **Month Date** and **Discrepancy Category.** If these values are selected and **View Report** button is clicked the required report appears.*

5. Select the date in the **Month Date** field for which you want the report.
6. Select the discrepancy categories in the **Discrepancy Category** field.
7. Click the **View Report** button. The report gets displayed in the empty space.

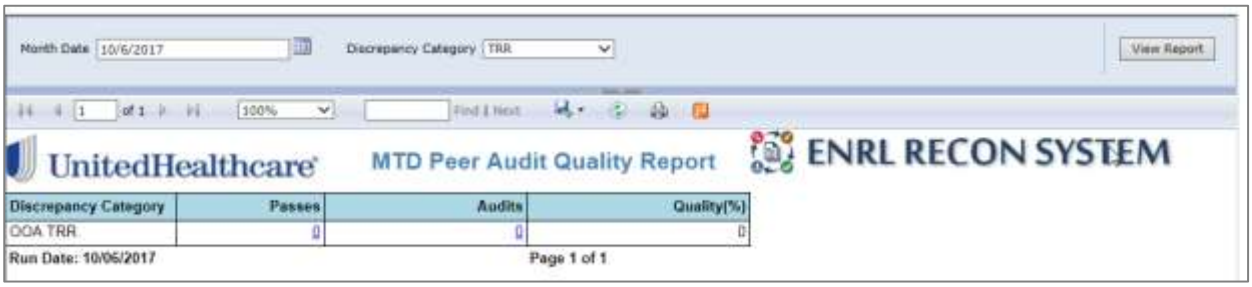


Figure 8-6: The Standard Report

8.2.1.2 Accessing Queue Summary Reports

To access the queue summary reports:

1. Go to **Application** menu, point to **<work basket>** → **<discrepancy category>→** and select **Get Queue** link.

For example, if you want to access **OOA Queue Summary Report** page, under **Application** menu point to **OST→ OAA→ Get Queue** link. The **OOA Queue Summary** page appears.

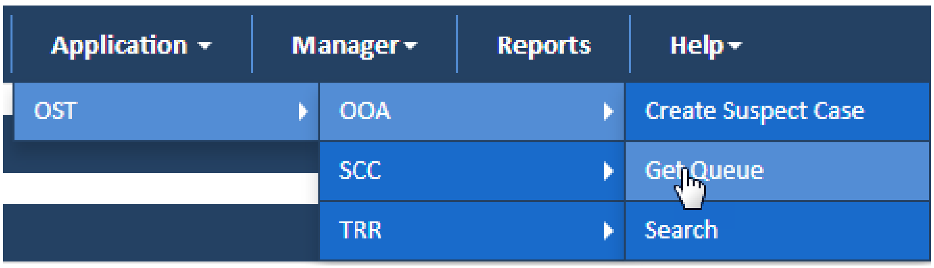


Figure 8-7: Accessing OOA Queue Summary Report

Figure 8-8: OAA Queue Summary page

2. Go to any queue summary table such as Processing Queues, Holding Queues, and Completed Queues.
3. Under the **Actions** column in queues table, click the **View Report** icon in line with the queue name.

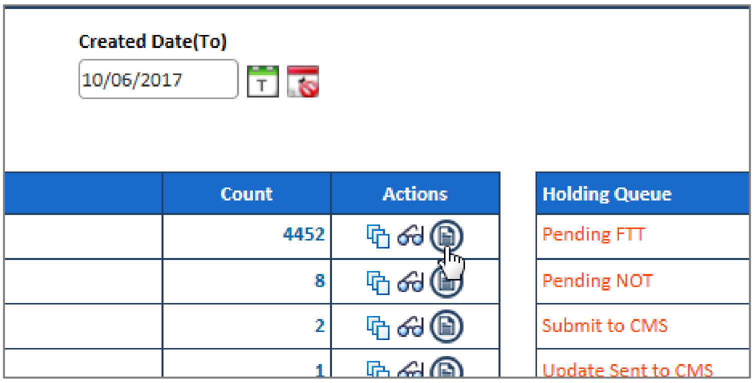


Figure 8-9: View Report icon in Action column

4. The require queue summary report appears

<Report Image not available >

8.2.1.3 Accessing History Reports

The history reports are accessed from the search results in the administration maintenance activities. For example, you can access the **User Admin History Report** from the user **Search Results** table.

To access the history reports:

1. Go to any of the **Search Results** table under **Maintenance** or **Administration** activities. For example, User **Search Result** table under the **Administration** menu.
2. To open the search results table, go to the **Administration** menu and click the **Manage User** sub menu.

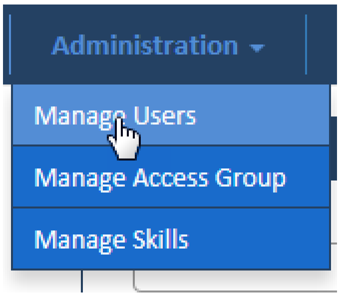


Figure 8-10: Administration Menu>Manage User Sub-menu

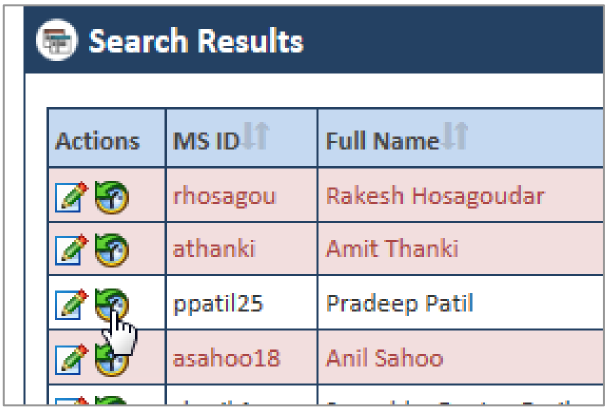
The **Search Result** table appears

3. Go to the action icon in the **Actions** column.

Actions	MS ID	Full Name	Email	Start Date(UTC)	End Date(UTC)	LockedBy	LockedOn(UTC)
	rhosagou	Rakesh Hosagoudar	rakesh.h@uhc.com	08/01/2017 12:39 PM	08/01/2067 12:39 PM	Kiran Babu	10/4/2017 3:46:40 PM
	athanki	Amit Thanki	amit.thanki@uhc.com	08/01/2017 12:47 PM	08/01/2099 12:48 PM	Arockia Robert	10/5/2017 9:54:45 AM
	ppatil25	Pradeep Patil	pradeep.patil@uhc.com	08/01/2017 12:52 PM	07/31/2027 06:42 PM		
	asahoo18	Anil Sahoo	anil.sahoo@uhc.com	08/01/2017 12:56 PM	07/31/2027 06:42 PM	Arockia Robert	10/5/2017 9:53:55 AM
	sbarik1	Sourabha Ranjan Barik	sourabha.barik@uhc.com	08/01/2017 01:01 PM	07/31/2026 06:42 PM		
	kbabu2	Kiran Babu	kiran.babu@uhc.com	08/01/2017 01:03 PM	07/31/2027 06:42 PM		
	spatel79	Soumya Patel	soumya.patel@uhc.com	08/01/2017 01:07 PM	07/31/2027 06:42 PM		
	hsinghi	Harsh Singhi	harsh.singhi@uhc.com	08/01/2017 01:23 PM	07/31/2027 06:42 PM		
	sbasha16	Shaik Mahaboob Basha	shaikmahaboob.basha@uhc.com	08/01/2017 03:41 AM	08/01/2099 03:44 AM		

Figure 8-11: The User Search Results table

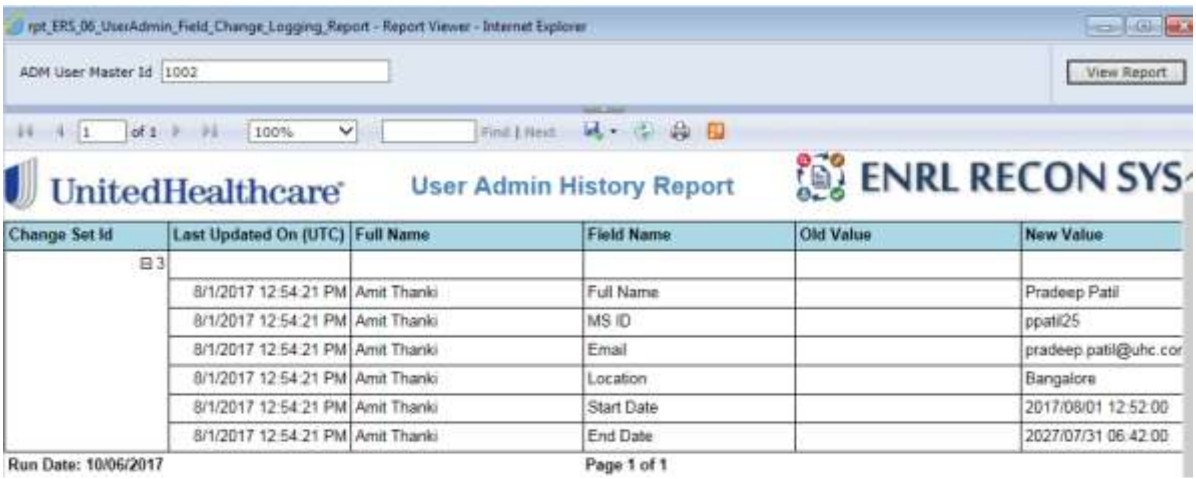
4. Under the **Actions** column, click the **View Report** icon.



Actions	MS ID	Full Name
	rhosagou	Rakesh Hosagoudar
	athanki	Amit Thanki
	ppatil25	Pradeep Patil
	asahoo18	Anil Sahoo

Figure 8-12: Action column> View Reports Icon

The **User Admin History Report** appears.



Change Set Id	Last Updated On (UTC)	Full Name	Field Name	Old Value	New Value
⊟ 3					
	8/1/2017 12:54:21 PM	Amit Thanki	Full Name		Pradeep Patil
	8/1/2017 12:54:21 PM	Amit Thanki	MS ID		ppatil25
	8/1/2017 12:54:21 PM	Amit Thanki	Email		pradeep.patil@uhc.cor
	8/1/2017 12:54:21 PM	Amit Thanki	Location		Bangalore
	8/1/2017 12:54:21 PM	Amit Thanki	Start Date		2017/08/01 12:52:00
	8/1/2017 12:54:21 PM	Amit Thanki	End Date		2027/07/31 06:42:00

Run Date: 10/06/2017 Page 1 of 1

Figure 8-13: The User Admin History Report

8.2.2 ERS Standard Reports

Based on the work baskets, the reports are different in the ERS application. The following reports are available in ERSs application.

Eligibility Standard Reports

<Reports are not available for Eligibility>

OST Standard Reports

- ERS Home Page Summary Report
- ERS Error Logging Report
- ERS Locked Records Report
- MTD Peer Audit Quality Report
- Daily Dashboard Summary Report
- Pending Report
- Monthly Metrics Report
- OOA Tracking Report
- RPR Submission Report

8.2.2.1 ERS Home Page Summary Report

The ERS Home Page Summary Report provides the details of the queues statuses. This report displays the total numbers of Processed, Holding and Completed queues those are available in the home page.

Navigation

To access the **Error Logging Report**, select the **ERS Error Log Report** in the **Report Name** field and click the **View** button.

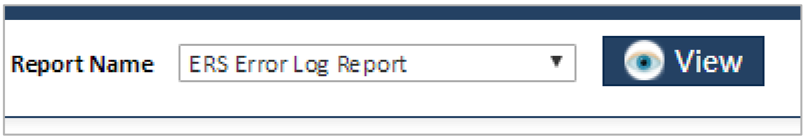


Figure 8-14: Accessing Error Logging Report

Queues Details

- OOA Queue Status
  - OOA Processing Total
  - OOA Holding Total
  - OOA Completed Total
- OOA TRR Queue Status
  - OOA TRR Processing Total
  - OOA TRR Holding Total
  - OOA TRR Completed Total
- SSC Discrepancy Queue Status
  - SSC Processing Total
  - SSC Holding Total
  - SSC Completed Total
- Eligibility Discrepancy Queue Status
  - Elig Processing Total
  - Elig Holding Total
  - Elig Completed Total

- Gender Discrepancy Queue Status
    - Gender Processing Total
    - Gender Completed Total
- DOB Discrepancy Queue Status
    - DOB Processing Total
    - DOB Completed Total
- RPR Queue Status
    - RPR Processing Total
    - RPR Holding Total
    - RPR Completed Total

You can select the start and end date in the **From Date** and **To Date** fields from which you can decide the period for which you want to search reports.

Figure 8-15: The Home Page Summary Report

8.2.2.2 ERS Error Logging Report

This report displays the error logs in the system in a tabular format. The report displays the duration of the report by dates along with other details of the reports. You can decide the duration of the report by selecting the value in the start and end date in the **From Date** and **To Date** fields respectively.

Navigation

To access the **Error Logging Report**, select the **ERS Error Log Report** in the **Report Name** field and click the **View** button.

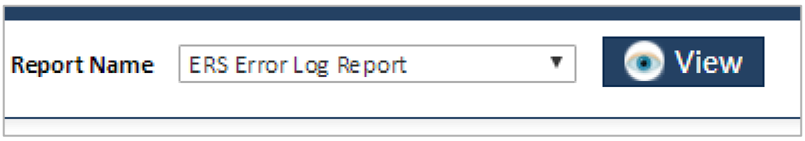


Figure 8-16: Accessing Error Logging Report

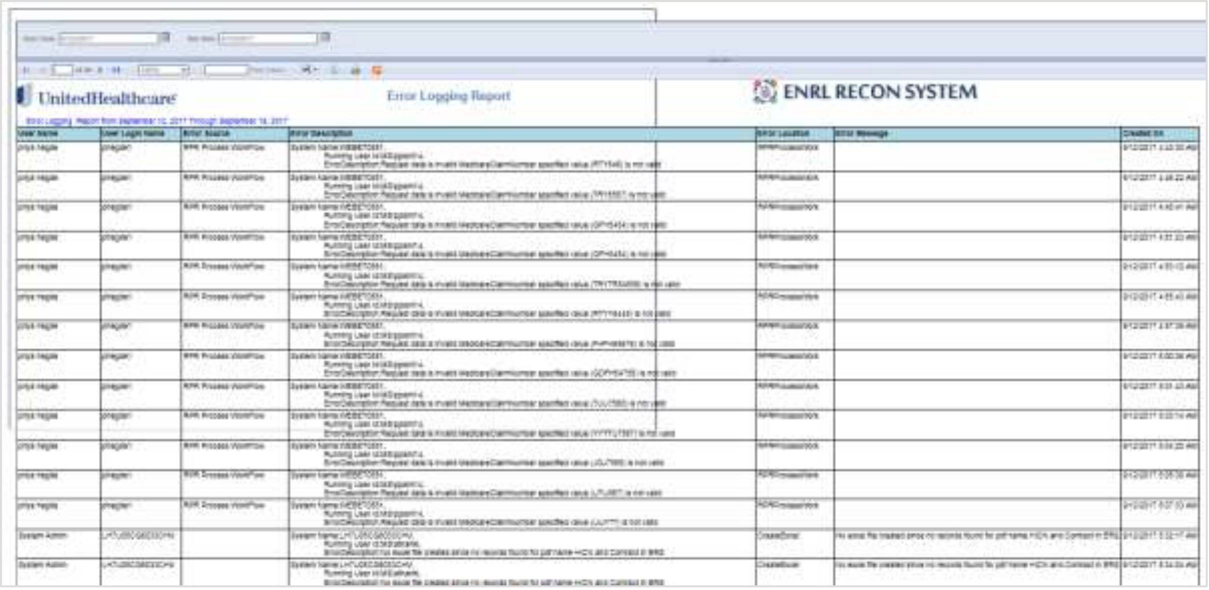


Figure 8-17: The Error Logging Reports

Column Name	Description
User Name	Displays the user name that created and identified the error in the system.
User Login Name	Displays the user login name that created and identified the error in the system.
Error Source	Displays the source of the error message.
Error Description	Displays the details of the error description.
Error Location	Displays the error location.
Error Message	Displays the error message.
Created On	Displays date when the error was identified.

8.2.2.3 Daily Dashboard Summary Report

This dashboard summary report displays the activities in the ERS queues in a day to basis. The daily activities are organized by color coding. The report gets highlighted in **green** for **0-4** days, **yellow** for **4-7** days and red for **8 – 31+** days columns. The columns display activity counts for each queue in the table.

Navigation:

To access the Daily Dashboard Summary Report, select the Daily Dashboard Report in the Report Name field and click the View button.

Figure 8-18: Daily Dashboard Report

Daily Dashboard Summary Report

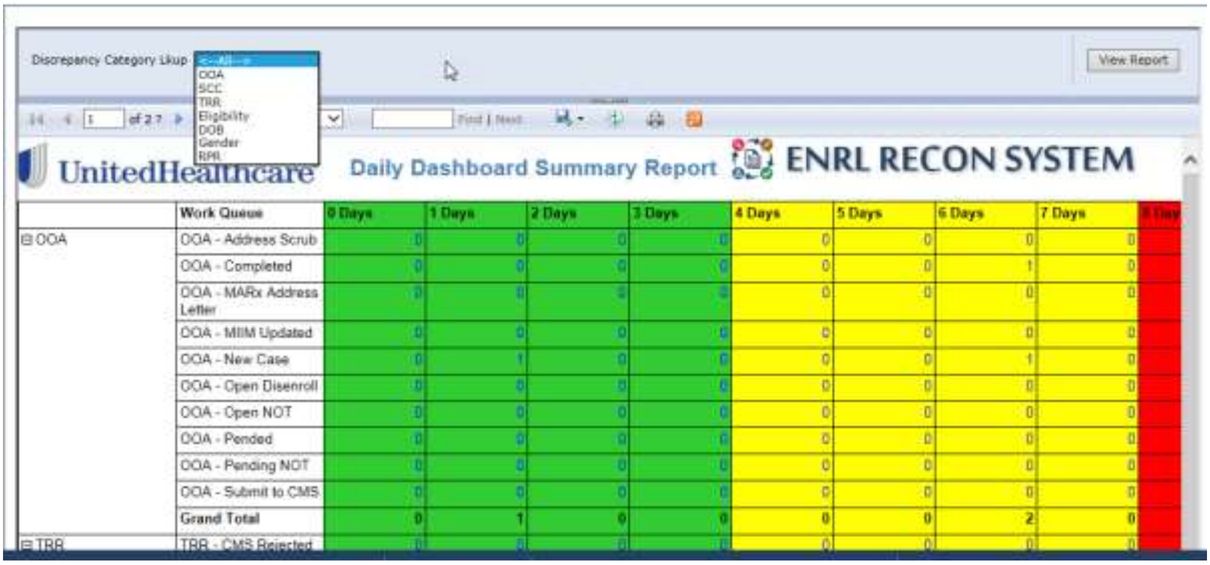


Figure 8-19: Daily Dashboard summary Report

Following are the columns appear in the report:

Work queues

- 0 Days
- 1 Days
- 2 Days
- 3 Days
- 4 Days
- 5 Days
- 6 Days
- 7 Days
- 8 Days
- 9 Days
- 10 Days
- 11- 20 Days
- 21- 30 Days
- 31+ Days
- Grand Total
- +/- Daily Change
- Prod Hours
- Oldest

You can customize the report based on the discrepancy category by selecting the appropriate values in the **Discrepancy Category** field.

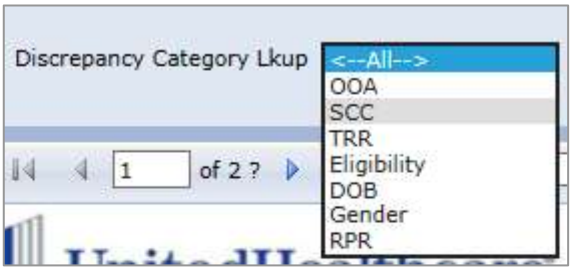
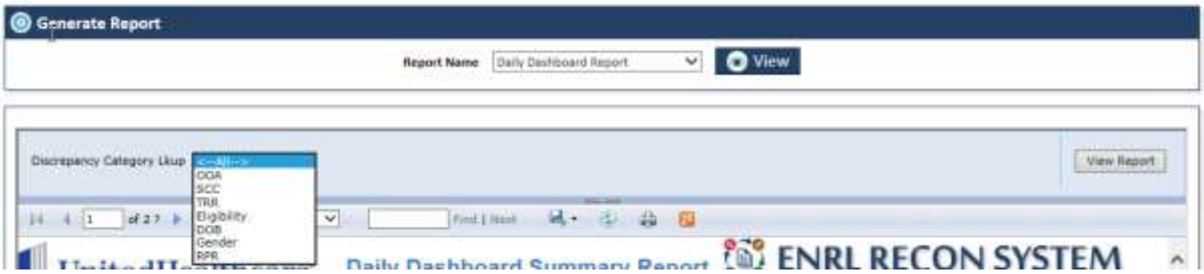


Figure 8-20: Discrepancy Category in Report

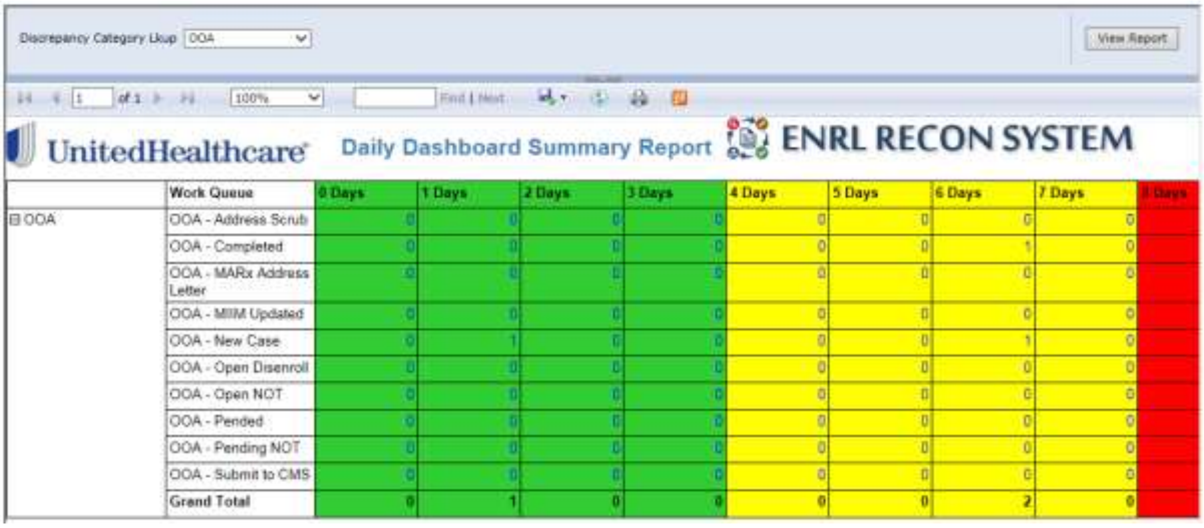
To access a particular report, you can select the value in the **Discrepancy Category Lkup** field and click the **View** button.

For example, to access the OOA daily Dash Board Summary Report:

1. Go to the **Discrepancy Category Lkup** drop down combo box.



2. Select the **OOA** from the list.
3. Click the View Report button. The Daily Dashboard Summary Report for OOA appears.



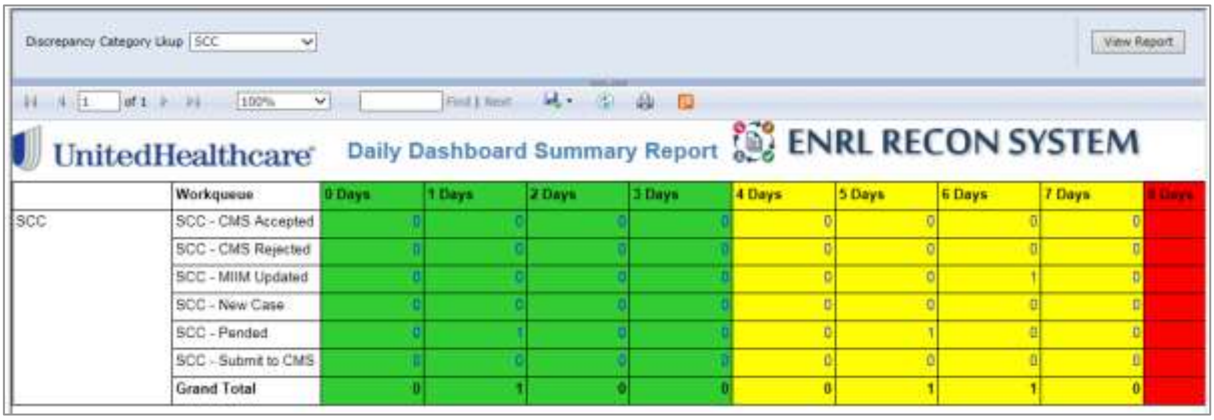
Discrepancy Category Lkup: OOA

UnitedHealthcare — Daily Dashboard Summary Report — ENRL RECON SYSTEM

	Work Queue	0 Days	1 Days	2 Days	3 Days	4 Days	5 Days	6 Days	7 Days	8 Days
⊟ OOA	OOA - Address Scrub	0	0	0	0	0	0	0	0	
	OOA - Completed	0	0	0	0	0	0	1	0	
	OOA - MARx Address Letter	0	0	0	0	0	0	0	0	
	OOA - MIIM Updated	0	0	0	0	0	0	0	0	
	OOA - New Case	0	1	0	0	0	0	1	0	
	OOA - Open Disenroll	0	0	0	0	0	0	0	0	
	OOA - Open NOT	0	0	0	0	0	0	0	0	
	OOA - Pended	0	0	0	0	0	0	0	0	
	OOA - Pending NOT	0	0	0	0	0	0	0	0	
	OOA - Submit to CMS	0	0	0	0	0	0	0	0	
	Grand Total	0	1	0	0	0	0	2	0	

Figure 8-21: Daily Dashboard Summary Report >OOA

8.2.2.3.1 Other Dashboard Summary Reports



Discrepancy Category Lkup: SCC

UnitedHealthcare — Daily Dashboard Summary Report — ENRL RECON SYSTEM

	Workqueue	0 Days	1 Days	2 Days	3 Days	4 Days	5 Days	6 Days	7 Days	8 Days
SCC	SCC - CMS Accepted	0	0	0	0	0	0	0	0	
	SCC - CMS Rejected	0	0	0	0	0	0	0	0	
	SCC - MIIM Updated	0	0	0	0	0	0	1	0	
	SCC - New Case	0	0	0	0	0	0	0	0	
	SCC - Pended	0	1	0	0	0	1	0	0	
	SCC - Submit to CMS	0	0	0	0	0	0	0	0	
	Grand Total	0	1	0	0	0	1	1	0	

Figure 8-22: Daily Dashboard Summary Report >SCC

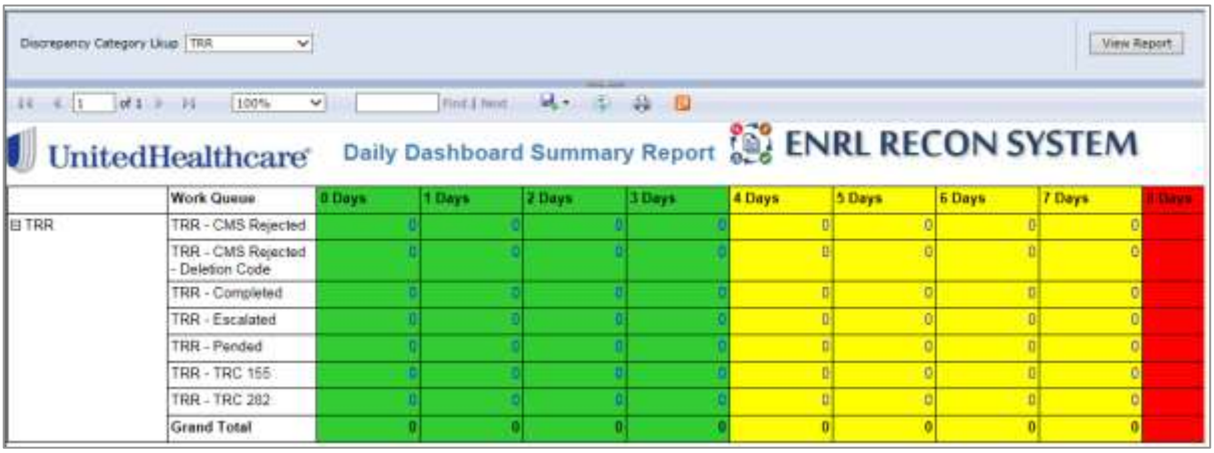


Figure 8-23: Daily Dashboard Summary Report >TRR

Figure 8-24: Daily Dashboard Summary Report >Eligibility

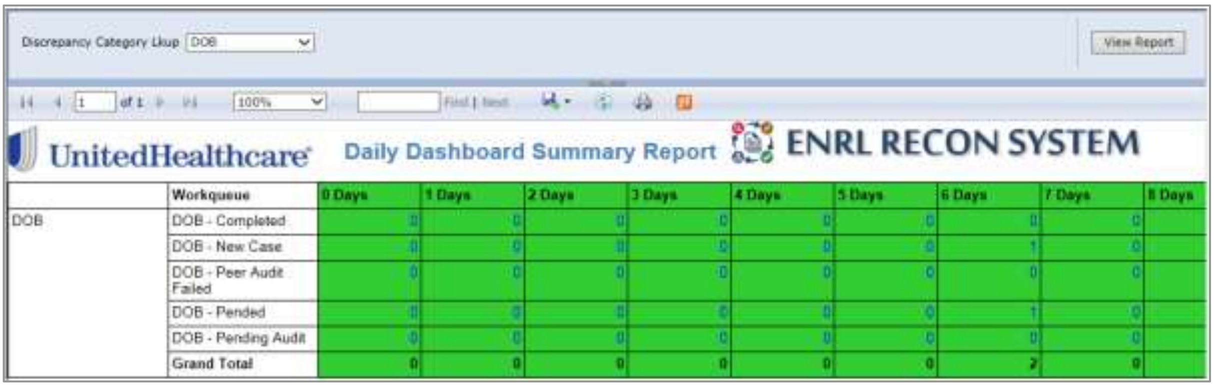
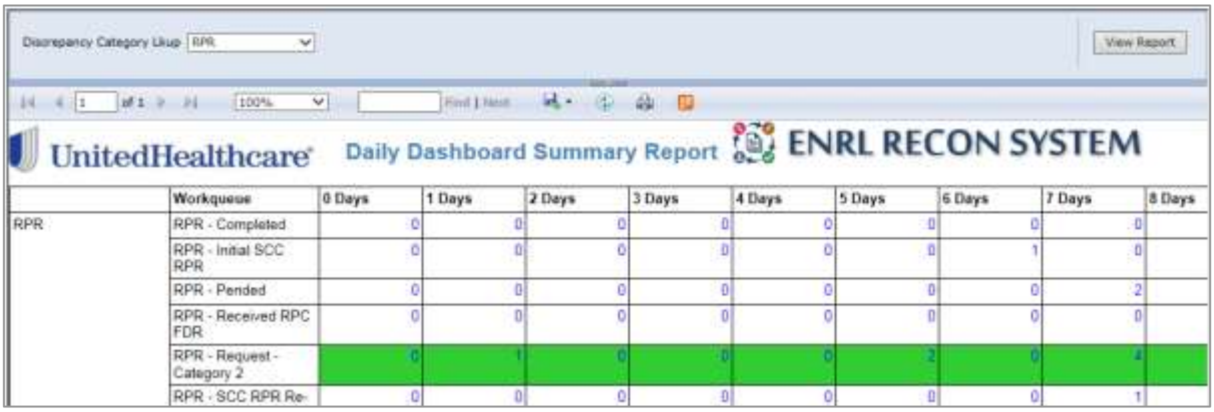


Figure 8-25: Daily Dashboard Summary Report >DOB

Figure 8-26: Daily Dashboard Summary Report >Gender



	Workqueue	0 Days	1 Days	2 Days	3 Days	4 Days	5 Days	6 Days	7 Days	8 Days
RPR	RPR - Completed	0	0	0	0	0	0	0	0	
	RPR - Initial SCC RPR	0	0	0	0	0	0	1	0	
	RPR - Pended	0	0	0	0	0	0	0	2	
	RPR - Received RPC FDR	0	0	0	0	0	0	0	0	
	RPR - Request - Category 2	0	1	0	0	0	2	0	4	
	RPR - SCC RPR Re-	0	0	0	0	0	0	0	1	

Figure 8-27: Daily Dashboard Summary Report >RPR

8.2.2.4 Locked Records Report

This report displays all the details of the locked records in the system in tabular format.

Purpose: The purpose of the report displayed on top of the report. The message is displayed as, '**Purpose: Locked Report will provide details of all current locked records.'**

Run date: This report display the report run date below to the report.

Navigation:

To access the **Locked Records Report**, select the **ERS Locked Records Report** in the **Report Name** field and click the **View** button.

Figure 8-28: ERS Locked Records Report

Figure 8-29: The ERS Locked Records Report

Column Name	Description
Member ID	Displays the member ID.
Member Current HICN	Displays the member current HICN.
GPS Household ID	Displays the GPS Household ID.
Business Segment	Displays the business segment.
Work Basket	Displays the work basket.
Discrepancy Category	Displays the discrepancy category.
Discrepancy Type	Displays the discrepancy type.
Locked By Name	Displays the locked by name.

Column Name	Description
UTC Locked On	Displays the date when the case locked on.
Most Recent Action	Displays the most recent action.
Created By	Displays the user that Created record.
Last Updated By	Displays the user that last updated record.
Record Lock Time	Displays the record lock time.

8.2.2.5 MTD Peer Audit Quality Report

The report provides the details about the peer audit quality of the queues.

Navigation:

1. To access the MTD Peer Audit Quality Report, select the MTD Peer Audit Quality Report in the Report Name field and click the View button.

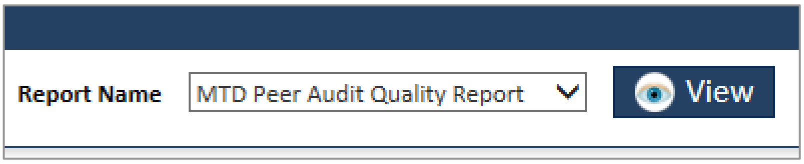
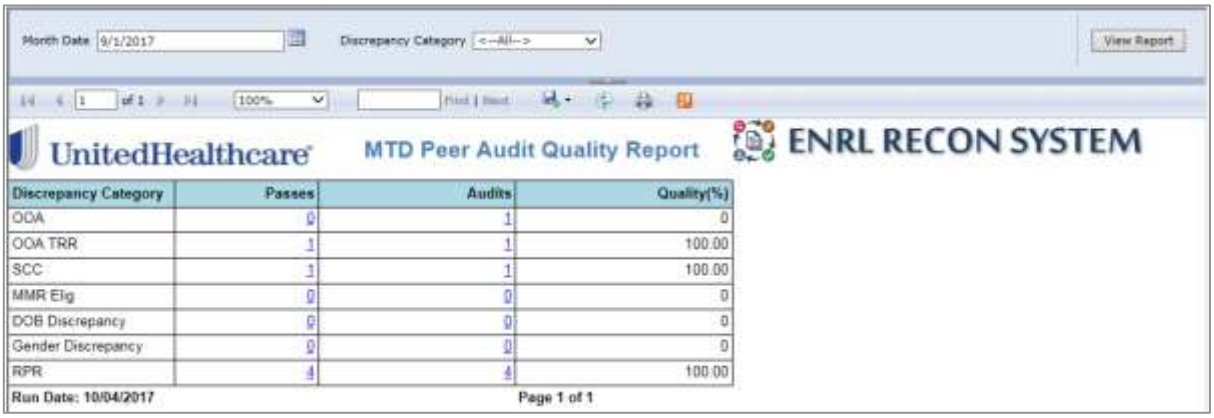


Figure 8-30: MTD Peer Audit Quality Report

The Month Date and the Discrepancy Category field appear.

Figure 8-31: The Month Date and Discrepancy Category Fields

2. Select the date in the **Month Date** field.
3. Select the appropriate value in the **Discrepancy Category** field.
4. Click the **View Report** button. The required report appears



Discrepancy Category	Passes	Audits	Quality(%)
OOA	0	1	0
OOA TRR	1	1	100.00
SCC	1	1	100.00
MMR Elig	0	0	0
DOB Discrepancy	0	0	0
Gender Discrepancy	0	0	0
RPR	4	4	100.00

Run Date: 10/04/2017 Page 1 of 1

Figure 8-32: MTD Peer Audit Quality Report

Column Name	Description
Discrepancy Category	Displays the discrepancy category.
Passes	Displays the passes for each discrepancy category.
Audits	Displays the number of audits.
Quality (%)	Displays the quality percentage.

8.2.2.5.1 Other MTD Peer Audit Quality Report

Figure 8-33: MTD Peer Audit Quality Report> OOA

Figure 8-34: MTD Peer Audit Quality Report> SCC

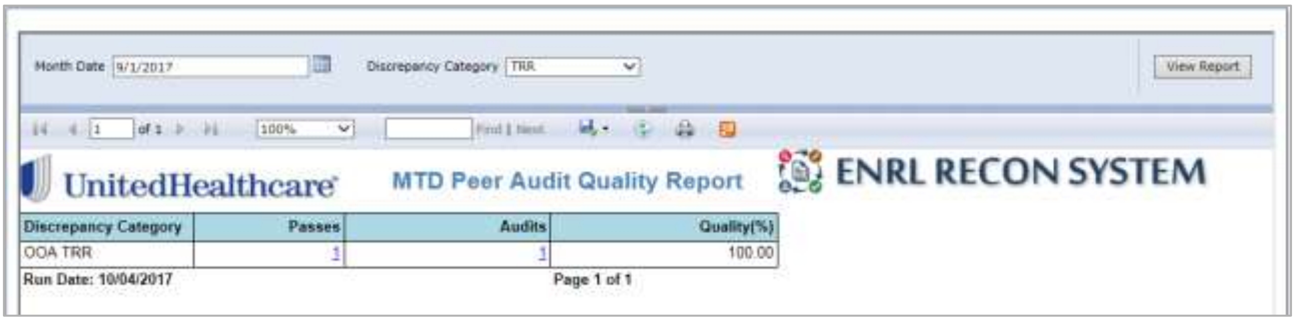


Figure 8-35: MTD Peer Audit Quality Report> TRR

Figure 8-36: MTD Peer Audit Quality Report> Eligibility

Figure 8-37: MTD Peer Audit Quality Report> Gender

Figure 8-38: MTD Peer Audit Quality Report> DOB

Figure 8-39: MTD Peer Audit Quality Report> RPR

8.2.2.6 Pending Summary Report

This report displays all the pending cases for each discrepancy category in the application. This report displays case details such as count, duration and the user it is assigned to. You can filter the report based on the discrepancy category.

Navigation:

1. To access the **Pending Summary Report** select the **Pending Report** in the **Report Name** field and click the **View** button.

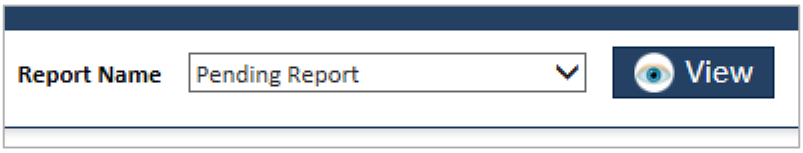


Figure 8-40: Pending Report

The **Discrepancy Category** field appears.

Figure 8-41: The Discrepancy Category Field

2. Select the appropriate value in the **Discrepancy Category** field. If you select the value Yes, it displays the report all the details of the discrepancy cases.
3. Click the **View Report** button. The required report appears

Category	Count	Oldest	Last Updated	Oldest ID	Oldest Assigned To
OOA	8	12 Days	12 Days	2	Arockia Robert
OOA	1	29 Days	9 Days	43986	Soumya Patel
SCC	2	5 Days	5 Days	45973	Shaik Mahaboob Basha
TRR	1	9 Days	1 Days	43979	Amit Thanki
Eligibility	3	10 Days	12 Days	42631	Arockia Robert
Eligibility	2	10 Days	1 Days	41766	Abhijit Dey
Eligibility	1	10 Days	1 Days	41771	Abhijit Dey
Eligibility	1	72 Days	1 Days	41776	Abhijit Dey
Eligibility	1	10 Days	1 Days	41767	Abhijit Dey
DOB	1	6 Days	1 Days	45967	Abhijit Dey
RPR	1	7 Days	5 Days	45952	Rakesh Hosagoudar
RPR	1	7 Days	5 Days	45954	Pradeep Patil

Figure 8-42: Pending Summary Report

Column Name	Description
Category	Displays the discrepancy category.
Count	Displays the number of the pending cases against each category.
Oldest	Displays the number of the days the case is pending for.
Last Updated	Displays the number days before which the case was updated.
Oldest ID	Displays the oldest ID of the case.
Oldest Assigned to	Displays the user to which it was assigned to.

8.2.2.6.1 Other Pending Summary Report

Category	Count	Oldest	Last Updated	Oldest ID	Oldest Assigned To
OOA	8	12 Days	12 Days	2	Arockia Robert
OOA	1	29 Days	9 Days	43986	Soumya Patel

Run Date: 10/04/2017 Page 1 of 1

Figure 8-43: Pending Summary Report> OOA

Category	Count	Oldest	Last Updated	Oldest ID	Oldest Assigned To
SCC	2	5 Days	5 Days	45973	Shaik Mahaboob Basha

Run Date: 10/04/2017 Page 1 of 1

Figure 8-44: Pending Summary Report> SCC

Category	Count	Oldest	Last Updated	Oldest ID	Oldest Assigned To
Eligibility	3	10 Days	12 Days	42631	Arockia Robert
Eligibility	2	10 Days	1 Days	41766	Abhijit Dey
Eligibility	1	10 Days	1 Days	41771	Abhijit Dey
Eligibility	1	72 Days	1 Days	41776	Abhijit Dey
Eligibility	1	10 Days	1 Days	41767	Abhijit Dey

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Figure 8-45: Pending Summary Report> Eligibility

Category	Count	Oldest	Last Updated	Oldest ID	Oldest Assigned To
DOB	1	6 Days	1 Days	45967	Abhijit Dey

Run Date: 10/04/2017 Page 1 of 1

Figure 8-46: Pending Summary Report> DOB

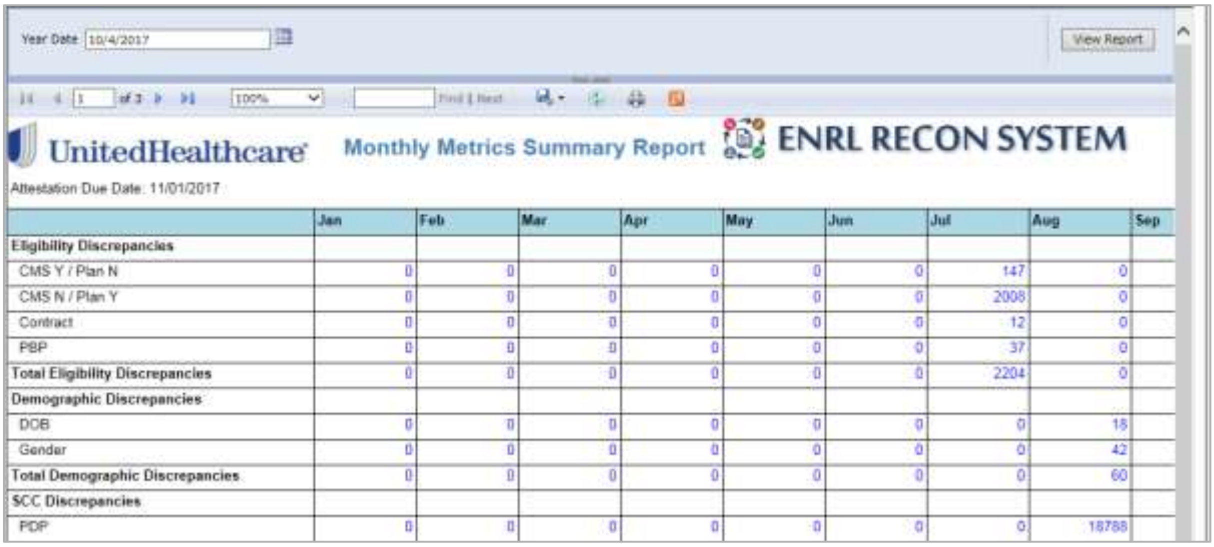
Figure 8-47: Pending Summary Report> Gender

Category	Count	Oldest	Last Updated	Oldest ID	Oldest Assigned To
RPR	1	7 Days	5 Days	45952	Rakesh Hosagoudar
RPR	1	7 Days	5 Days	45954	Pradeep Patil

Run Date: 10/04/2017 Page 1 of 1

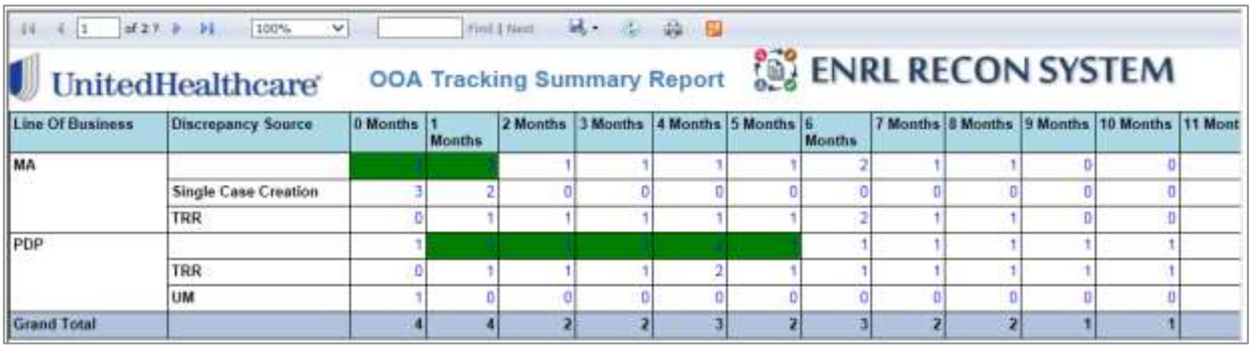
Figure 8-48: Pending Summary Report> RPR

8.2.2.7 Monthly Metrics Report



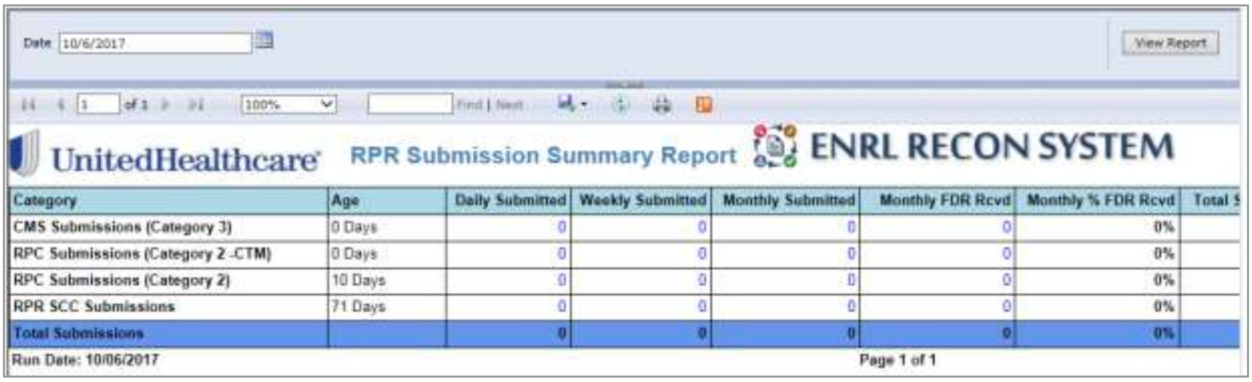
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Eligibility Discrepancies									
CMS Y / Plan N	0	0	0	0	0	0	147	0	
CMS N / Plan Y	0	0	0	0	0	0	2008	0	
Contract	0	0	0	0	0	0	12	0	
PBP	0	0	0	0	0	0	37	0	
Total Eligibility Discrepancies	0	0	0	0	0	0	2204	0	
Demographic Discrepancies									
DOB	0	0	0	0	0	0	0	18	
Gender	0	0	0	0	0	0	0	42	
Total Demographic Discrepancies	0	0	0	0	0	0	0	60	
SCC Discrepancies									
PDP	0	0	0	0	0	0	0	18788	

8.2.2.8 OOA Tracking Report



Line Of Business	Discrepancy Source	0 Months	1 Months	2 Months	3 Months	4 Months	5 Months	6 Months	7 Months	8 Months	9 Months	10 Months	11 Mont
MA		[illegible]	[illegible]	1	1	1	1	2	1	1	0	0	
	Single Case Creation	3	2	0	0	0	0	0	0	0	0	0	
	TRR	0	1	1	1	1	1	2	1	1	0	0	
PDP		1	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1	1	1	1	1	
	TRR	0	1	1	1	2	1	1	1	1	1	1	
	UM	1	0	0	0	0	0	0	0	0	0	0	
Grand Total		4	4	2	2	3	2	3	2	2	1	1	

8.2.2.9 RPR Submission Report



Category	Age	Daily Submitted	Weekly Submitted	Monthly Submitted	Monthly FDR Rcvd	Monthly % FDR Rcvd	Total S
CMS Submissions (Category 3)	0 Days	0	0	0	0	0%	
RPC Submissions (Category 2 -CTM)	0 Days	0	0	0	0	0%	
RPC Submissions (Category 2)	10 Days	0	0	0	0	0%	
RPR SCC Submissions	71 Days	0	0	0	0	0%	
Total Submissions		0	0	0	0	0%	

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Figure 8-49: RPR Submission Report

Column Name	Description
Category	Displays the RPR submission queues.
Age	Displays the age of the queues.
Daily Submitted	Displays the day wise submission of the queues.
Weekly Submitted	Displays the week wise submission of the queues.
Monthly Submitted	Displays the month wise submission of the queues.
Monthly FDR Recvd	Displays the monthly FDR received details.
Month % FDR Rcvd	Displays the percentage of the monthly FD received.
Total Submission	Displays the total RPR submission.

RPR Standard Reports

8.2.3 ERS Queue Summary Reports

<Reports are not available>

8.2.4 ERS History Reports

The history report can be accessed from the **Search Result** table. These reports are available under the Administration and Maintenance menus. For more information how to access history reports, refer to the Accessing History Reports section.

History Reports in Administration Menu

The following reports are available under the admin menu.

8.2.4.1 User Admin History Report

This report provides the details about the users created in the system. This report provides details about the old and new values for full name, MS ID, mail, location and so on. This also provides details about the user start and end date of the user account in the system.

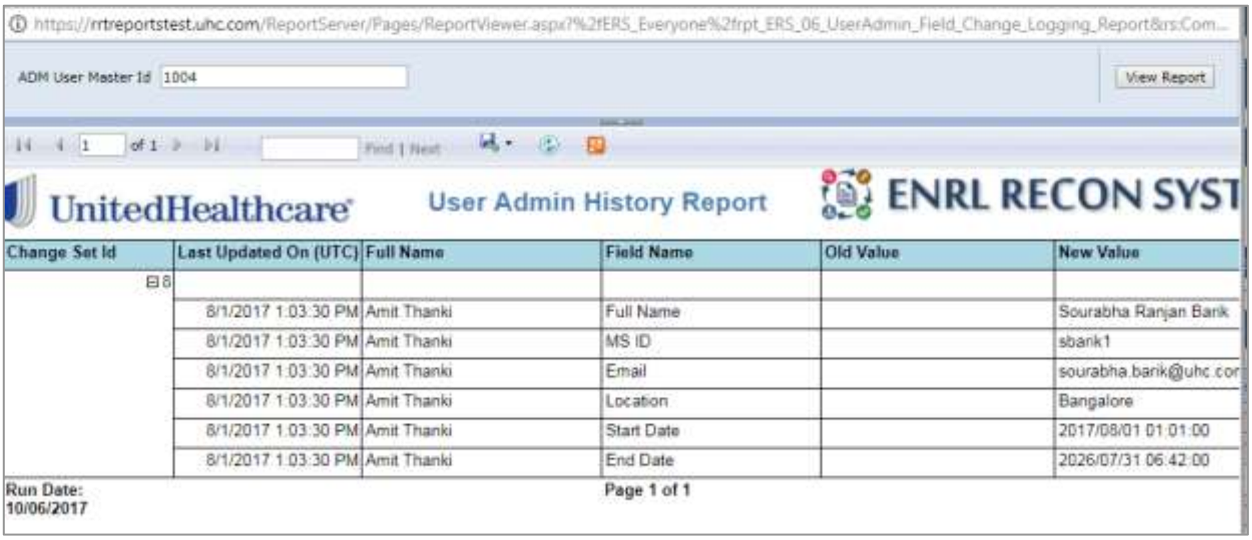
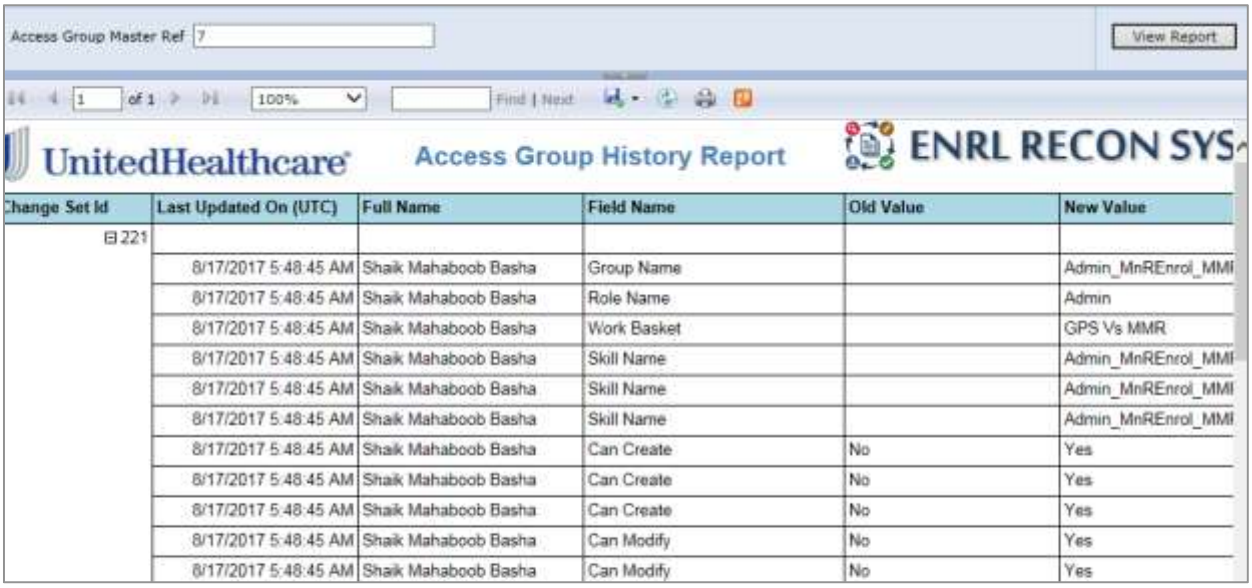


Figure 8-50: The User Admin History Report

Column Name	Description
ADM User Master Id	Enter the Master user ID to modify the user details in the system. This is the user that can create and modify the other user details.
View Report	Click this button to view the user details based on the user Master ID. The details displayed in the other columns of the table.
Change Set Id	Displays the change set ID. You can contract and expand the value in this field by click the – or the + icon attached with the ID number.
Last Updated On (UTC)	Displays the date when the user details are last updated.
Full Name	Displays the date when the user details are last updated.
Field Name	Displays the fields that are updated. The following field values are available in this section: • MS ID • Email • Location • Start Date • End Date
Old Value	Displays the older values for the user details fields.
New Value	Displays the newer values for the user details fields.

8.2.4.2 Access Group History Report

This report provides the details about the access groups created in the system. This report provides details about the old and new values for group name, role name, work basket skill names and user activates such as Can Create and Can Modify etc.


Access Group Master Ref 7 View Report

1 of 1 100% Find | Next

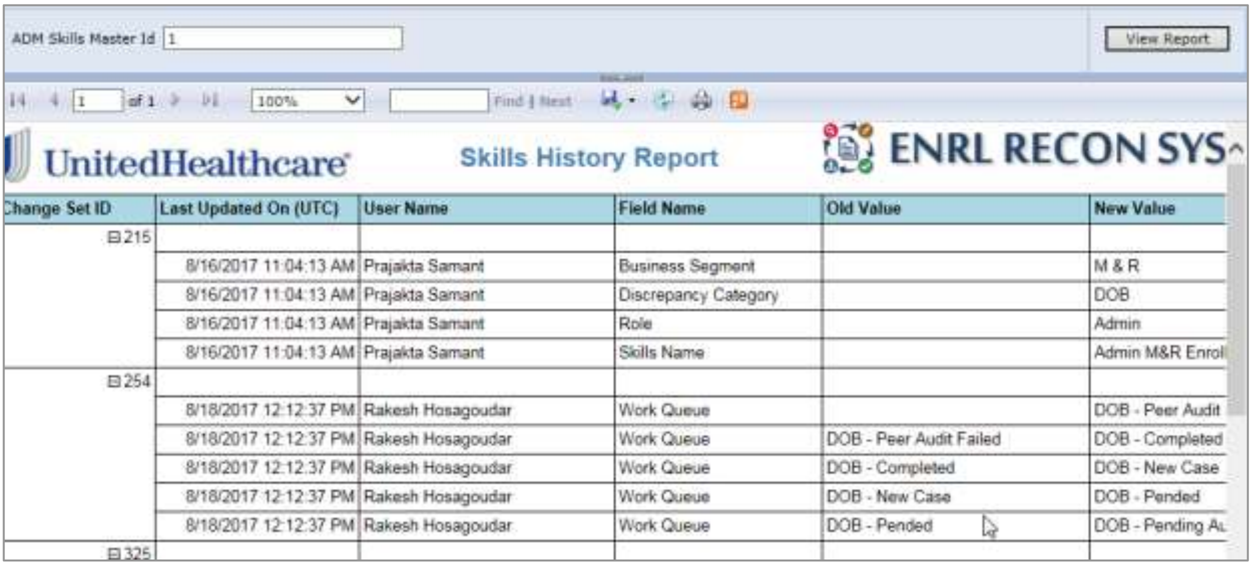
UnitedHealthcare Access Group History Report ENRL RECON SYS

Change Set Id	Last Updated On (UTC)	Full Name	Field Name	Old Value	New Value
⊟ 221					
	8/17/2017 5:48:45 AM	Shaik Mahaboob Basha	Group Name		Admin_MnREnrol_MMI
	8/17/2017 5:48:45 AM	Shaik Mahaboob Basha	Role Name		Admin
	8/17/2017 5:48:45 AM	Shaik Mahaboob Basha	Work Basket		GPS Vs MMR
	8/17/2017 5:48:45 AM	Shaik Mahaboob Basha	Skill Name		Admin_MnREnrol_MMI
	8/17/2017 5:48:45 AM	Shaik Mahaboob Basha	Skill Name		Admin_MnREnrol_MMI
	8/17/2017 5:48:45 AM	Shaik Mahaboob Basha	Skill Name		Admin_MnREnrol_MMI
	8/17/2017 5:48:45 AM	Shaik Mahaboob Basha	Can Create	No	Yes
	8/17/2017 5:48:45 AM	Shaik Mahaboob Basha	Can Create	No	Yes
	8/17/2017 5:48:45 AM	Shaik Mahaboob Basha	Can Create	No	Yes
	8/17/2017 5:48:45 AM	Shaik Mahaboob Basha	Can Modify	No	Yes
	8/17/2017 5:48:45 AM	Shaik Mahaboob Basha	Can Modify	No	Yes

Figure 8-51: The Access Group History Report

Column Name	Description
Access Group Master Ref	Enter the Master reference number of the access group.
View Report	Click this button to view the user details based on the user Master ID. The details displayed in the other columns of the table.
Change Set Id	Displays the change set ID. You can contract and expand the value in this field by click the – or the + icon attached with the ID number.
Last Updated On (UTC)	Displays the date when the user details are last updated.
Full Name	Displays the date when the user details are last updated.
Field Name	Displays the fields that are updated. These are group name, role name, skill name and so on.
Old Value	Displays the older values for the user details fields.
New Value	Displays the newer values for the user details fields.

8.2.4.3 Skills History Report



ADM Skills Master Id 1 | View Report

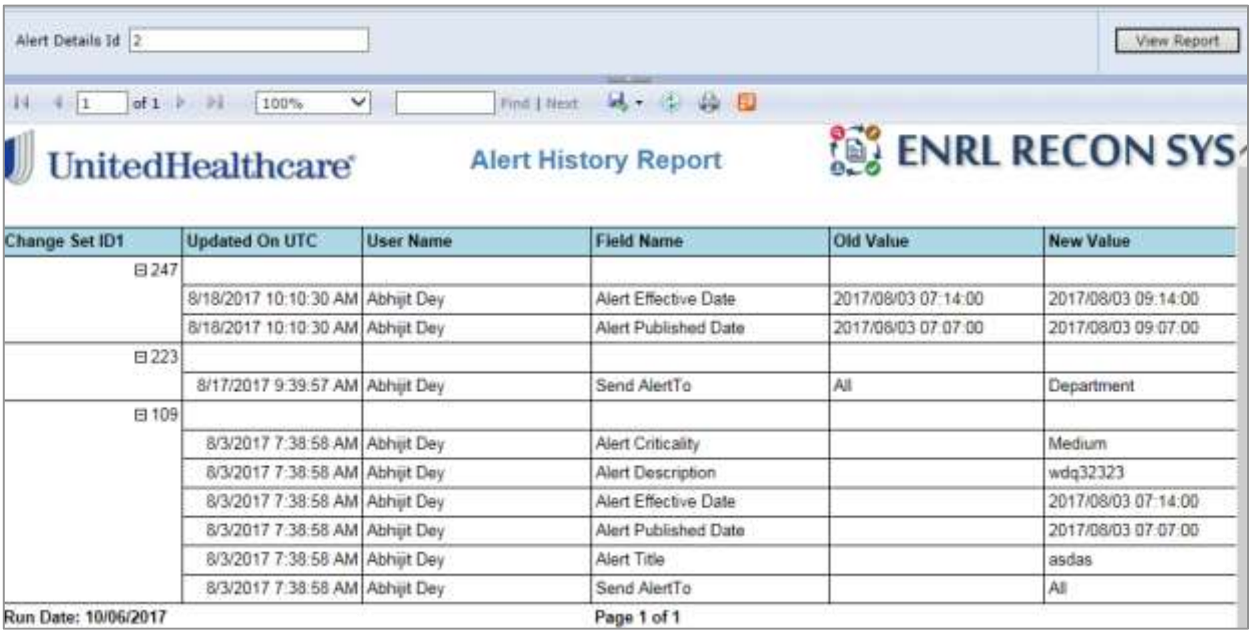
UnitedHealthcare — Skills History Report — ENRL RECON SYS

Change Set ID	Last Updated On (UTC)	User Name	Field Name	Old Value	New Value
⊟215					
	8/16/2017 11:04:13 AM	Prajakta Samant	Business Segment		M & R
	8/16/2017 11:04:13 AM	Prajakta Samant	Discrepancy Category		DOB
	8/16/2017 11:04:13 AM	Prajakta Samant	Role		Admin
	8/16/2017 11:04:13 AM	Prajakta Samant	Skills Name		Admin M&R Enrol
⊟254					
	8/18/2017 12:12:37 PM	Rakesh Hosagoudar	Work Queue		DOB - Peer Audit
	8/18/2017 12:12:37 PM	Rakesh Hosagoudar	Work Queue	DOB - Peer Audit Failed	DOB - Completed
	8/18/2017 12:12:37 PM	Rakesh Hosagoudar	Work Queue	DOB - Completed	DOB - New Case
	8/18/2017 12:12:37 PM	Rakesh Hosagoudar	Work Queue	DOB - New Case	DOB - Pended
	8/18/2017 12:12:37 PM	Rakesh Hosagoudar	Work Queue	DOB - Pended	DOB - Pending Au
⊟325					

Figure 8-52: The Skills History Report

History Reports in Maintenance Menu

8.2.4.4 Alert History Report



Alert Details Id 2 | View Report

UnitedHealthcare — Alert History Report — ENRL RECON SYS

Change Set ID1	Updated On UTC	User Name	Field Name	Old Value	New Value
⊟247					
	8/18/2017 10:10:30 AM	Abhijit Dey	Alert Effective Date	2017/08/03 07:14:00	2017/08/03 09:14:00
	8/18/2017 10:10:30 AM	Abhijit Dey	Alert Published Date	2017/08/03 07:07:00	2017/08/03 09:07:00
⊟223					
	8/17/2017 9:39:57 AM	Abhijit Dey	Send AlertTo	All	Department
⊟109					
	8/3/2017 7:38:58 AM	Abhijit Dey	Alert Criticality		Medium
	8/3/2017 7:38:58 AM	Abhijit Dey	Alert Description		wdq32323
	8/3/2017 7:38:58 AM	Abhijit Dey	Alert Effective Date		2017/08/03 07:14:00
	8/3/2017 7:38:58 AM	Abhijit Dey	Alert Published Date		2017/08/03 07:07:00
	8/3/2017 7:38:58 AM	Abhijit Dey	Alert Title		asdas
	8/3/2017 7:38:58 AM	Abhijit Dey	Send AlertTo		All

Run Date: 10/06/2017 Page 1 of 1

Figure 8-53: Alert History Report

8.2.4.5 Configuration History Report

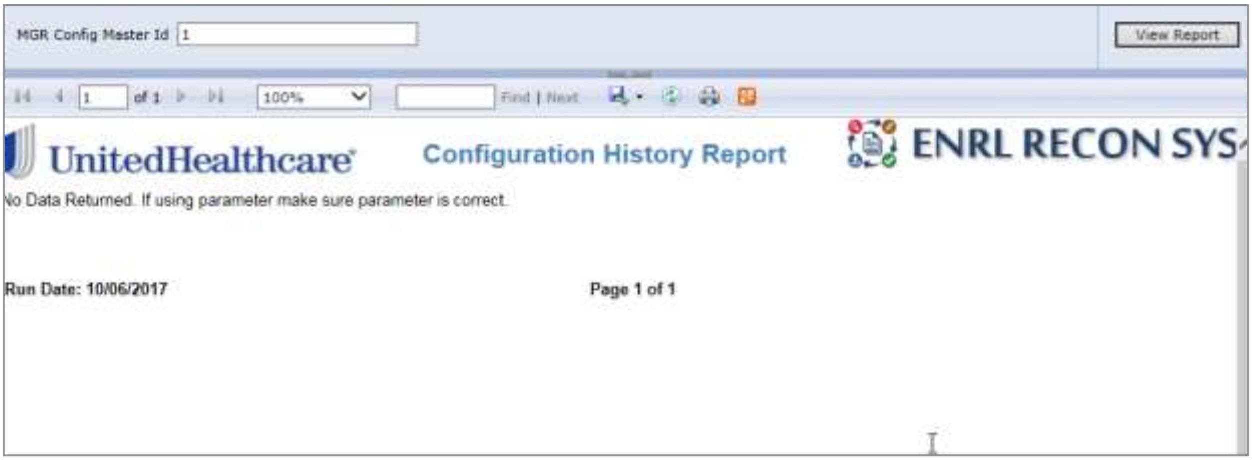
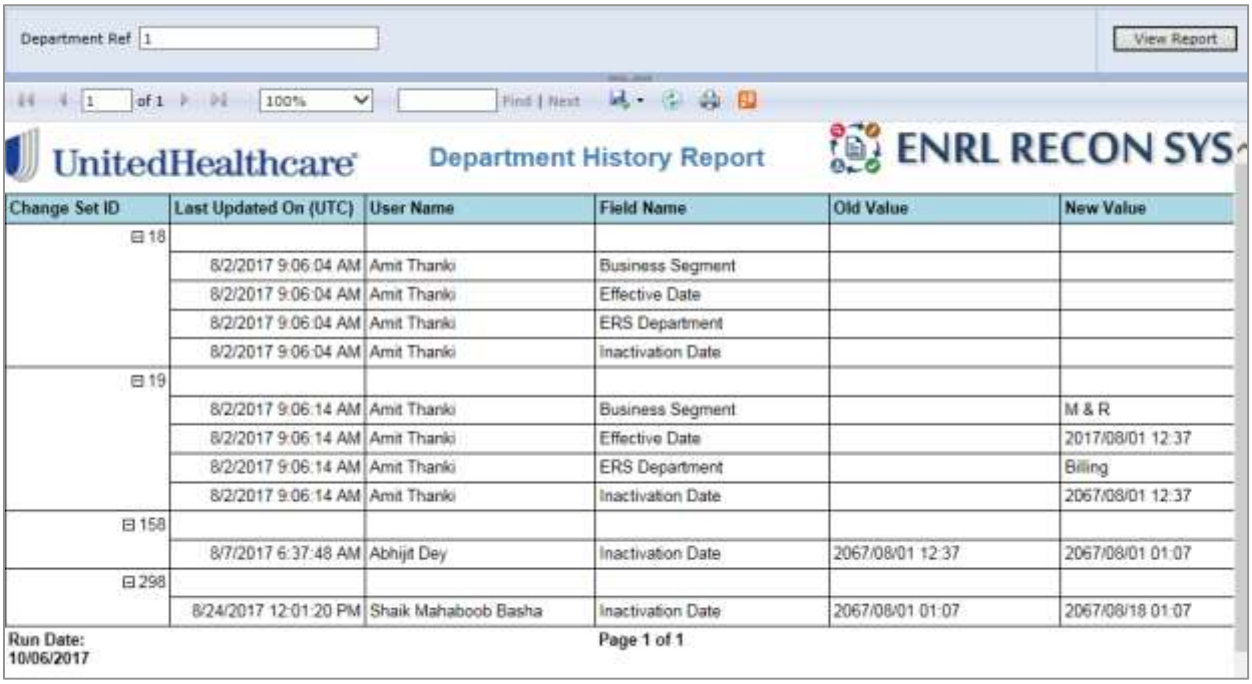


Figure 8-54: Configuration History Report

8.2.4.6 Department History Report

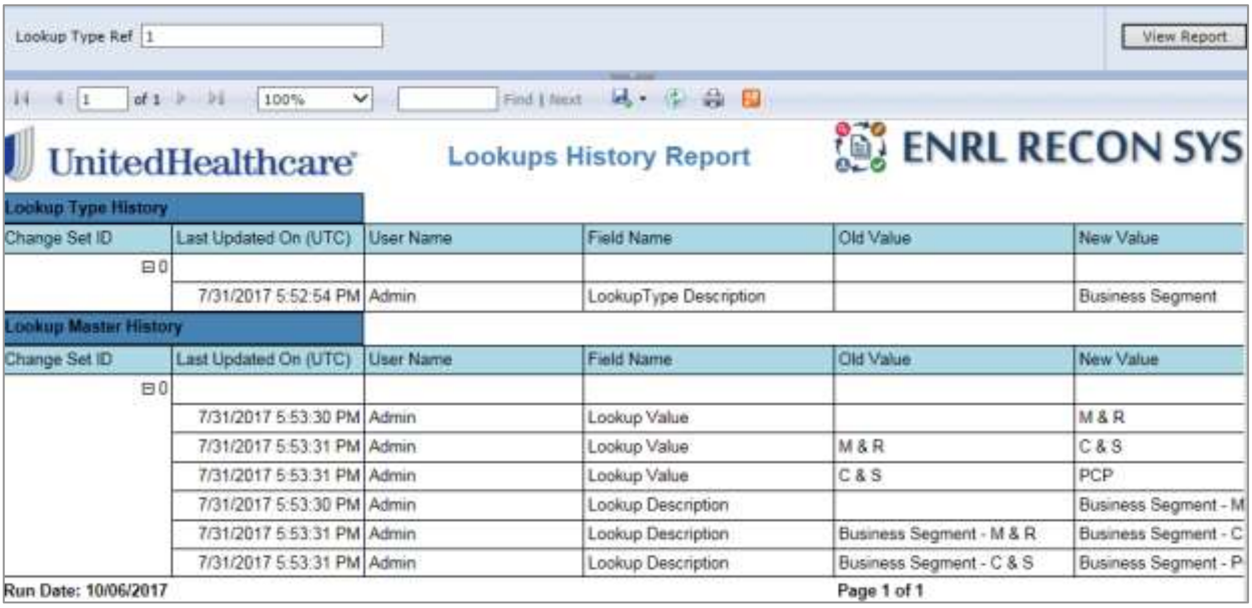


Change Set ID	Last Updated On (UTC)	User Name	Field Name	Old Value	New Value
⊟ 18					
	8/2/2017 9:06:04 AM	Amit Thanki	Business Segment		
	8/2/2017 9:06:04 AM	Amit Thanki	Effective Date		
	8/2/2017 9:06:04 AM	Amit Thanki	ERS Department		
	8/2/2017 9:06:04 AM	Amit Thanki	Inactivation Date		
⊟ 19					
	8/2/2017 9:06:14 AM	Amit Thanki	Business Segment		M & R
	8/2/2017 9:06:14 AM	Amit Thanki	Effective Date		2017/08/01 12:37
	8/2/2017 9:06:14 AM	Amit Thanki	ERS Department		Billing
	8/2/2017 9:06:14 AM	Amit Thanki	Inactivation Date		2067/08/01 12:37
⊟ 158					
	8/7/2017 6:37:48 AM	Abhijit Dey	Inactivation Date	2067/08/01 12:37	2067/08/01 01:07
⊟ 298					
	8/24/2017 12:01:20 PM	Shaik Mahaboob Basha	Inactivation Date	2067/08/01 01:07	2067/08/18 01:07

Run Date: 10/06/2017 Page 1 of 1

Figure 8-55: Department History Report

8.2.4.7 Lookups History Report



Lookup Type Ref 1 View Report

1 of 1 100% Find | Next

UnitedHealthcare Lookups History Report ENRL RECON SYS

Lookup Type History

Change Set ID	Last Updated On (UTC)	User Name	Field Name	Old Value	New Value
⊟0					
	7/31/2017 5:52:54 PM	Admin	LookupType Description		Business Segment

Lookup Master History

Change Set ID	Last Updated On (UTC)	User Name	Field Name	Old Value	New Value
⊟0					
	7/31/2017 5:53:30 PM	Admin	Lookup Value		M & R
	7/31/2017 5:53:31 PM	Admin	Lookup Value	M & R	C & S
	7/31/2017 5:53:31 PM	Admin	Lookup Value	C & S	PCP
	7/31/2017 5:53:30 PM	Admin	Lookup Description		Business Segment - M
	7/31/2017 5:53:31 PM	Admin	Lookup Description	Business Segment - M & R	Business Segment - C
	7/31/2017 5:53:31 PM	Admin	Lookup Description	Business Segment - C & S	Business Segment - P

Run Date: 10/06/2017 Page 1 of 1

Figure 8-56: Lookups History Report

8.2.4.8 Lookups Correlation History Report

Lookup Type Correlation Ref 1 View Report

1 of 1 100% Find | Next

UnitedHealthcare Lookups Correlation History Report ENRL RECON SYS

Lookup Type Correlation History

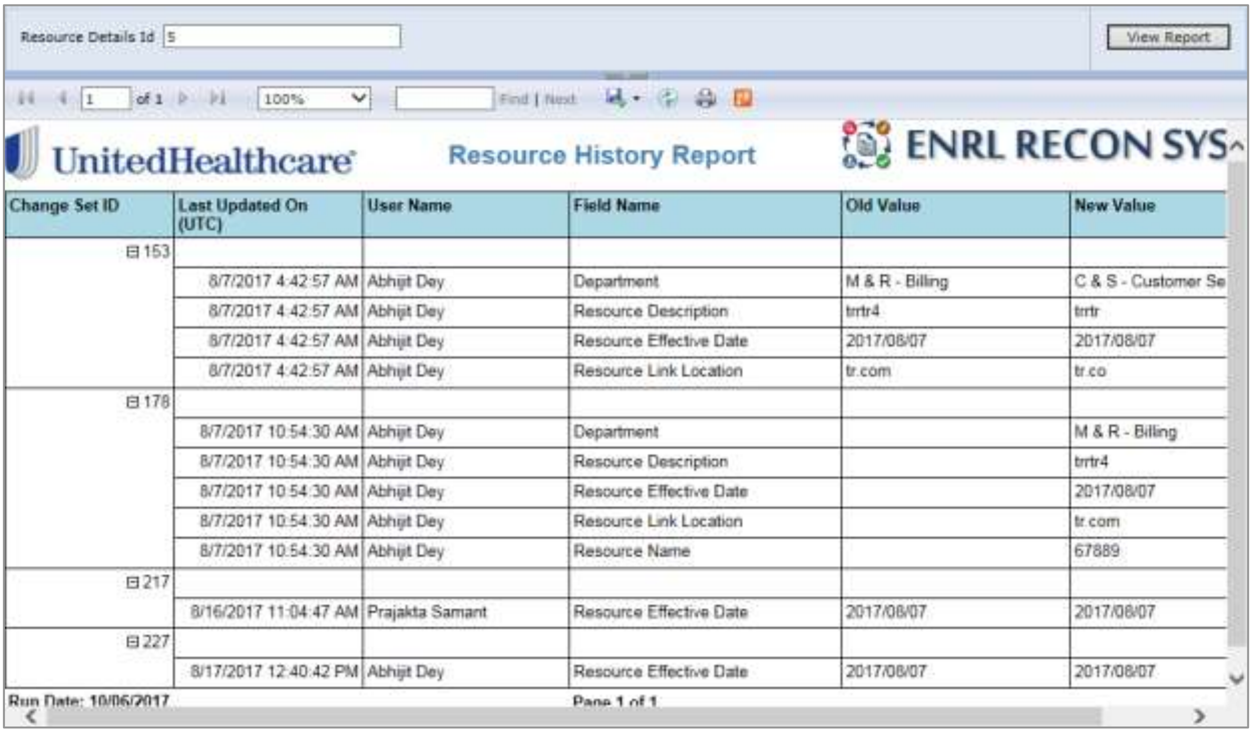
Change Set ID	Last Updated On (UTC)	User Name	Field Name	Old Value	New Value
⊟0					
	7/31/2017 5:59:32 PM	Admin	LookupType correlationDescription		Work Basket Vs Discr Category
	7/31/2017 5:59:32 PM	Admin	Parent Lookup		Work Basket
	7/31/2017 5:59:32 PM	Admin	Child Lookup		Discrepancy Category

Lookup Master Correlation History

Change Set ID	Last Updated On (UTC)	User Name	Field Name	Old Value	New Value
⊟0					
	7/31/2017 6:00:27 PM	Admin	LookupMaster CorrelationDescription		OST Vs OOA
	7/31/2017 6:00:27 PM	Admin	LookupMaster CorrelationDescription	OST Vs OOA	OST Vs SCC
	7/31/2017 6:00:27 PM	Admin	LookupMaster CorrelationDescription	OST Vs SCC	OST Vs TRR
	7/31/2017 6:00:28 PM	Admin	LookupMaster CorrelationDescription	OST Vs TRR	Eligibility Vs Eligibility
	7/31/2017 6:00:28 PM	Admin	LookupMaster CorrelationDescription	Eligibility Vs Eligibility	Eligibility Vs DOB

Figure 8-57: Lookups Correlation History Report

8.2.4.9 Resource History Report


Resource Details Id 5

View Report

UnitedHealthcare Resource History Report ENRL RECON SYS

Change Set ID	Last Updated On (UTC)	User Name	Field Name	Old Value	New Value
⊟ 153					
	8/7/2017 4:42:57 AM	Abhijit Dey	Department	M & R - Billing	C & S - Customer Se
	8/7/2017 4:42:57 AM	Abhijit Dey	Resource Description	trrtr4	trrtr
	8/7/2017 4:42:57 AM	Abhijit Dey	Resource Effective Date	2017/08/07	2017/08/07
	8/7/2017 4:42:57 AM	Abhijit Dey	Resource Link Location	tr.com	tr.co
⊟ 178					
	8/7/2017 10:54:30 AM	Abhijit Dey	Department		M & R - Billing
	8/7/2017 10:54:30 AM	Abhijit Dey	Resource Description		trrtr4
	8/7/2017 10:54:30 AM	Abhijit Dey	Resource Effective Date		2017/08/07
	8/7/2017 10:54:30 AM	Abhijit Dey	Resource Link Location		tr.com
	8/7/2017 10:54:30 AM	Abhijit Dey	Resource Name		67889
⊟ 217					
	8/16/2017 11:04:47 AM	Prajakta Samant	Resource Effective Date	2017/08/07	2017/08/07
⊟ 227					
	8/17/2017 12:40:42 PM	Abhijit Dey	Resource Effective Date	2017/08/07	2017/08/07

Run Date: 10/06/2017 Page 1 of 1

Figure 8-58: Resource History Report

History Reports in queues

8.2.4.10 Eligibility: Queue History Report

8.2.4.11 DOB: Queue History Report

8.2.4.12 Gender: Queue History Report

8.2.4.13 OOA: Queue History Report

8.2.4.14 SCC: Queue History Report

8.2.4.15 TRR: Queue History Report

8.2.4.16 RPR: Queue History Report

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Index

Glossary

A	**Application Tab**	A menu in the home page that helps request for review, doing a review, upload and search for all the review in Enrolment Recon System application.
	Audit Questionnaire	A questionnaire designed for the reviewer to perform a quality check. The questions marked with are mandatory and cannot be left blank.
R	**Resources**	In Resources Maintenance window, you can add, search, sort, edit and delete appropriate resources as illustrated in the following section.
	Review	To be able to access 'Review' page, login to the application with the role of a coordinator or reviewer. Click on the 'Review' link.
U	**User Administration**	A team based user role that cans user administration, manage roles and manager configuration. This use can add to the Letter Coordinator role so that they can add, edit, search the letters.

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