**MCCF EDI TAS USPY-24**

System Design Document

PRCA\*4.5\*317



Department of Veterans Affairs

**October 2016**

Version .01

**User Story Number:** USPY-24

**User Story Name:** Use Preferred View (Backlog ID# 250, Row 196)

# Background

A user needs a prompt of “Use preferred view?” when using the ERA Worklist, Scratch pad and APAR ePayments menu options.  They may choose their current preferred view (if they have one defined) to reduce time (and labor costs) or select Sort/Filter view criteria (and optionally save it as their preferred view).

# Story

As a user, I want a prompt to use or not use my preferred view in the ERA Worklist, Scratchpad and APAR so I can limit my options to the functionality that I use most often.

The “preferred view” statement will not be added to the title or the header of the ERA Worklist, scratchpad, or APAR. Users can look at their selected options listed and determine if they are viewing the correct info.

Add new prompt of “Use preferred view?” to the Change View action within ERA Worklist, Scratchpad and APAR, with a default of ‘N’. Only prompt when the user has a preferred view on file and is currently not displaying the preferred view.

# Conversation

In the current version of the software being used by a user, the *preferred view functionality* exists and is used to save sort/filter criteria for the ERA Worklist, scratchpad and APAR menu options. However, the sort/ filter criteria is asked only when the user does not have a saved preferred view. If the user does have a preferred view, the saved values from it are used and the display will be built honoring the preferred view. By adding an additional prompt of ‘Used Preferred View’ it would allow a user to skip using the preferred view and be allowed to re-answer all of the sort/filter prompts.

User Sequence

1. A user would launch an ERA Worklist, scratchpad (from within the ERA Worklist) or the APAR menu option.
   1. If the user has previously set up a preferred view, then the system would ask, “Use preferred view?” Y or N, Default N
      1. If the user selects Y then the sort/filter values stored in the preferred view will be used, the prompts would be skipped and the option would launch.
      2. If the user selects N then the all of the sort/filter prompts will be displayed to allow the user to select sort/filter criteria. After the prompts are displayed they will asked if they wish to save the selected values as their new preferred view which would overwrite the user’s current preferred view for the menu option if one currently exists.
2. A user would select the Change View action within the ERA Worklist, Scratchpad or APAR.
   1. If sort/filter criteria currently being used is NOT the values from their preferred view, the user will be prompted if they want to use their preferred view (only if a preferred view for that user exists). If the sort/filter criteria IS the values from their preferred view or the user does not have a preferred view, the ‘Use preferred view?” prompt will not be displayed and the user will be prompted to enter new sort/selection values.
      1. If the user selects Y to the preferred view prompt the screen will repaint based on the values of the preferred view.
      2. If the user selects N then the user will be prompted to enter new sort/filter values.

**ERA Worklist**

EDI Lockbox

EXC EDI Lockbox 3rd Party Exceptions

**WL ERA Worklist**

APAR Auto-Post Awaiting Resolution

MA Automatic Match EFTs to ERAs

MCR EEOB Move/Copy/Remove

MM Manual Match EFT-ERA

MO Move ERA Total To Suspense

OEFT Unposted EFT Override

REFT Remove Duplicate EFT Deposits

REM Remove ERA from Active Worklist

REP EDI Lockbox Reports Menu ...

UN Unmatch An ERA

UP Update ERA Posted Using Paper EOB

ZB Mark 0-Balance EFT Matched

Select EDI Lockbox Option:

**New behavior when selecting ERA WORKLIST** [[1]](#footnote-1) **option.**

Before the ERA Worklist is displayed, the user currently answers a number of sorting/filtering prompts. Every time the user answers all of these prompts for the Worklist, they are prompted if they want to save those answers as their preferred view for the Worklist. With this enhancement, the user will now be asked an additional prompt (‘Use preferred view’ with a default on NO, see highlighted below). However, this prompt will only be shown if the user has a preferred view on file for the Worklist. If they do not have a preferred view defined, the ‘use preferred view’ prompt will not be shown and the user will be prompted to enter the sorting/filtering criteria (and optionally save it as their Worklist preferred view) as before. If the user answers ‘NO’ to the new ‘Use preferred view’ prompt, they will be prompted to enter the sorting/filtering criteria (and optionally save it as their Worklist preferred view) as before. However, if the user answers ‘YES’ to the ‘Use preferred view’ prompt, they will NOT be prompted to enter sorting/filtering criteria for the Worklist. Instead, these values will be taken from their Worklist preferred view.

Select EDI Lockbox Option: WL ERA Worklist

DO YOU WANT A (L)IST OF ERAs OR A (S)PECIFIC ONE?: LIST//

LIMIT THE SELECTION TO A DATE RANGE WHEN THE ERA WAS RECEIVED?: NO//

**Use preferred view? NO//**

Select parameters for displaying the list of ERAs

ERA POSTING STATUS: (U)NPOSTED, (P)OSTED, OR (B)OTH: U// NPOSTED

DISPLAY (A)UTO-POSTING, (N)ON AUTO-POSTING, OR (B)OTH: B// OTH

ERA-EFT MATCH STATUS: (N)OT MATCHED, (M)ATCHED, OR (B)OTH: B// OTH

(M)EDICAL, (P)HARMACY, OR (B)OTH: B// OTH

(A)LL PAYERS, (R)ANGE OF PAYER NAMES: A// LL

DO YOU WANT TO SAVE THIS AS YOUR PREFERRED VIEW (Y/N)? NO//

**The user is presented with the ERA Worklist**

When the ERA Worklist is displayed, the header will contain all of the selected Sorting/filtering option values as before. This is current functionality.

**ERA List - Worklist** Oct 05, 2016@11:38:29 Page: 1 of 1

SELECTED MATCH STATUS: BOTH POST STATUS : UNPOSTED

DATE RANGE: NONE SELECTED AUTO-POSTING : BOTH

ALL PAYERS PHARMACY/MEDICAL: BOTH

# ERA # Trace#

PAYER NAME/MATCH STATUS ERA PAID DT TOT AMT PAID DT REC'D

1 1 12345

10/29/02 20.00 10/29/02

AN INSURANCE COMPANY NAME APPROX # EEOBs: 1

MATCHED TO PAPER CHECK EFT RECEIPT STATUS: NOT ENTERED

2 90 ABCDE

10/26/04 10.00 10/26/04

NM APPROX # EEOBs: 1

MATCHED N/A

|'-' No scratch pad|'x' EXC |'A' autopost complete

Select ERA View/Print ERA EXIT

Sort List Change View

Select Action: Quit//

**The Change View action from the ERA Worklist**

When the user selects the action CHANGE VIEW (within the ERA Worklist screen), the user is currently prompted to select new sorting/filtering criteria. With this enhancement, a new prompt will be added (‘Use preferred view’ with a default of ‘NO’ – see highlighted below) before selecting new sorting/filtering criteria. This new prompt will ONLY display if the user has a Worklist Preferred view defined AND the current Worklist display is NOT using the preferred view criteria. If the new prompt is not displayed, the user will be prompted to enter new sorting/filtering criteria (and optionally save it as their Worklist preferred view) and the Worklist will be redisplayed using the newly selected sorting/filtering criteria as before. If the user answers ‘NO’ to the ‘Use preferred view’ prompt, they will be prompted to enter new sorting/filtering criteria (and optionally save it as their Worklist preferred view) and the Worklist will be redisplayed using the newly selected sorting/filtering criteria. If the user answers ‘YES’ to the ‘Use preferred view’ prompt, they will NOT be prompted to enter new sorting/filtering criteria. Instead, the sorting/filtering criteria will be taken from the Worklist preferred view and the Worklist will be redisplayed using the newly selected sorting/filtering criteria.

Select Action: Quit// change view Change View

**Use preferred view? NO//**

Select parameters for displaying the list of ERAs

ERA POSTING STATUS: (U)NPOSTED, (P)OSTED, OR (B)OTH: U// NPOSTED

DISPLAY (A)UTO-POSTING, (N)ON AUTO-POSTING, OR (B)OTH: B// OTH

ERA-EFT MATCH STATUS: (N)OT MATCHED, (M)ATCHED, OR (B)OTH: B// OTH

(M)EDICAL, (P)HARMACY, OR (B)OTH: B// OTH

(A)LL PAYERS, (R)ANGE OF PAYER NAMES: A// LL

DO YOU WANT TO SAVE THIS AS YOUR PREFERRED VIEW (Y/N)? NO//

**SCRATCH PAD**

The user sees the Scratch Pad by first selecting ERA Worklist from the EDI LOCKBOX menu and then selecting an ERA from the body of the Worklist by using the ‘Select ERA’ action.

EDI Lockbox

EXC EDI Lockbox 3rd Party Exceptions

**WL ERA Worklist**

APAR Auto-Post Awaiting Resolution

MA Automatic Match EFTs to ERAs

MCR EEOB Move/Copy/Remove

MM Manual Match EFT-ERA

MO Move ERA Total To Suspense

OEFT Unposted EFT Override

REFT Remove Duplicate EFT Deposits

REM Remove ERA from Active Worklist

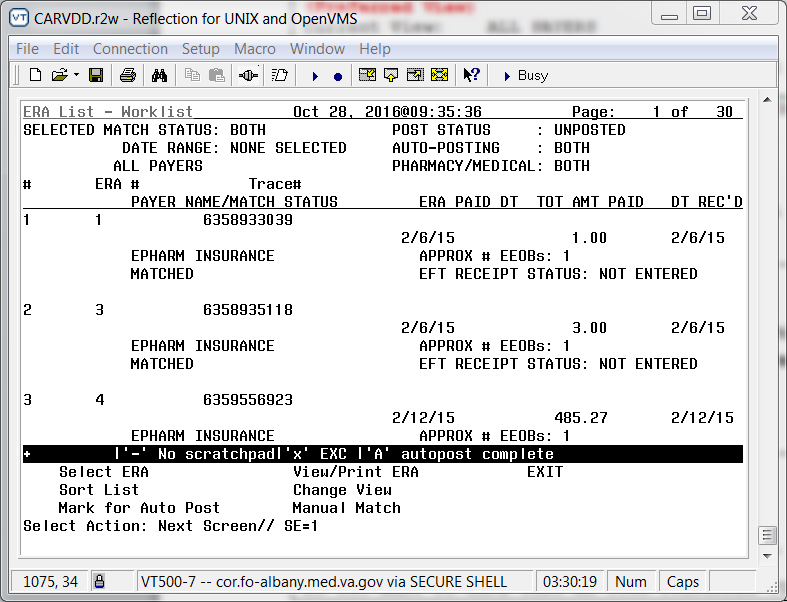
REP EDI Lockbox Reports Menu ...

UN Unmatch An ERA

UP Update ERA Posted Using Paper EOB

ZB Mark 0-Balance EFT Matched

Select EDI Lockbox Option:



**New behavior when accessing the Scratch pad from the ERA WORKLIST option.**

Before the ERA Worklist Scratch Pad is displayed, the user currently answers a number of sorting/filtering prompts. Every time the user answers all of these prompts for the Scratch Pad, they are prompted if they want to save those answers as their preferred view for the Scratch Pad. With this enhancement, the user will now be asked an additional prompt (‘Use preferred view’ with a default on NO, see highlighted below). However, this prompt will only be shown if the user has a preferred view on file for the Scratch Pad. If they do not have a preferred view defined, the ‘use preferred view’ prompt will not be shown and the user will be prompted to enter the sorting/filtering criteria (and optionally save it as their Scratch Pad preferred view) as before. If the user answers ‘NO’ to the new ‘Use preferred view’ prompt, they will be prompted to enter the sorting/filtering criteria (and optionally save it as their Scratch preferred view) as before. However, if the user answers ‘YES’ to the ‘Use preferred view’ prompt, they will NOT be prompted to enter sorting/filtering criteria for the Scratch Pad. Instead, these values will be taken from their Scratch Pad preferred view.

**Select Action: Quit// SE Select ERA**

Select #: (1-2): 1

THIS ERA ALREADY HAS A RECEIPT - YOU MAY ONLY VIEW ITS SCRATCH PAD

Press ENTER to continue:

**Use preferred view? NO//**

ORDER OF PAYMENT: (N)O ORDER, ZERO-PAYMENTS (F)IRST, ZERO-PAYMENTS (L)AST: N// O

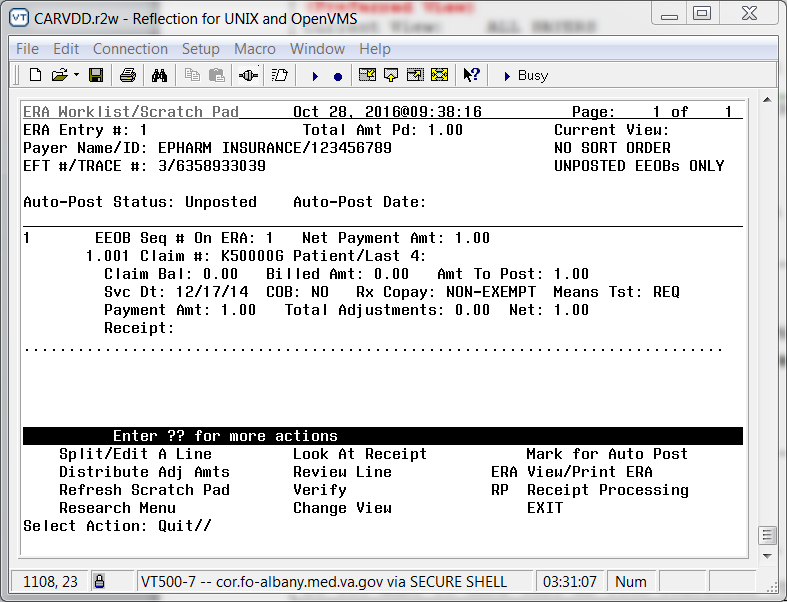
ORDER

DISPLAY FOR AUTO-POSTED ERAS: (U)NPOSTED EEOBs, (P)OSTED EEOBs, OR (A)LL: U// NP

OSTED

DO YOU WANT TO SAVE THIS AS YOUR PREFERRED VIEW (Y/N)? NO//

**The user is presented with the Scratch Pad. The selected Sorting/filtering criteria is displayed in the header under ‘Current View’ as before.**

****

**The Change View action from the ERA Worklist Scratch Pad**

When the user selects the action CHANGE VIEW (within the ERA Worklist Scratch Pad screen), the user is currently prompted to select new sorting/filtering criteria. With this enhancement, a new prompt will be added (‘Use preferred view’ with a default of ‘NO’ – see highlighted below) before selecting new sorting/filtering criteria. This new prompt will ONLY display if the user has a Scratch Pad Preferred view defined AND the current Scratch Pad display is NOT using the preferred view criteria. If the new prompt is not displayed, the user will be prompted to enter new sorting/filtering criteria (and optionally save it as their Scratch Pad preferred view) and the Scratch Pad will be redisplayed using the newly selected sorting/filtering criteria as before. If the user answers ‘NO’ to the ‘Use preferred view’ prompt, they will be prompted to enter new sorting/filtering criteria (and optionally save it as their Scratch Pad preferred view) and the Scratch Pad will be redisplayed using the newly selected sorting/filtering criteria. If the user answers ‘YES’ to the ‘Use preferred view’ prompt, they will NOT be prompted to enter new sorting/filtering criteria. Instead, the sorting/filtering criteria will be taken from the Scratch Pad preferred view and the Scratch Pad will be redisplayed using the newly selected sorting/filtering criteria.

**Use preferred view? NO//**

ORDER OF PAYMENT: (N)O ORDER, ZERO-PAYMENTS (F)IRST, ZERO-PAYMENTS (L)AST: N// O

ORDER

DISPLAY FOR AUTO-POSTED ERAS: (U)NPOSTED EEOBs, (P)OSTED EEOBs, OR (A)LL: U// NP

OSTED

DO YOU WANT TO SAVE THIS AS YOUR PREFERRED VIEW (Y/N)? NO//

**Auto-Post Awaiting Resolution (APAR)**

**New behavior when accessing the APAR option.**

Before the APAR Worklist is displayed, the user currently answers a filtering prompt. After the user selects a filtering option for the APAR, they are prompted to save the answer as their preferred view for the APAR. With this enhancement, the user will now be asked an additional prompt (‘Use preferred view’ with a default on NO, see highlighted below). However, this prompt will only be shown if the user has a preferred view on file for the APAR Worklist. If they do not have a preferred view defined, the ‘Use preferred view’ prompt will not be shown and the user will be prompted to enter the filtering criteria (and optionally save it as their APAR preferred view) as before. If the user answers ‘NO’ to the new ‘Use preferred view’ prompt, they will be prompted to enter the filtering criteria (and optionally save it as their APAR preferred view) as before. However, if the user answers ‘YES’ to the ‘Use preferred view’ prompt, they will NOT be prompted to enter filtering criteria for the APAR Worklist. Instead, the filtering criteria will be taken from their APAR Worklist preferred view.

EDI Lockbox

EXC EDI Lockbox 3rd Party Exceptions

WL ERA Worklist

**APAR Auto-Post Awaiting Resolution**

MA Automatic Match EFTs to ERAs

MCR EEOB Move/Copy/Remove

MM Manual Match EFT-ERA

MO Move ERA Total To Suspense

OEFT Unposted EFT Override

REFT Remove Duplicate EFT Deposits

REM Remove ERA from Active Worklist

REP EDI Lockbox Reports Menu ...

UN Unmatch An ERA

UP Update ERA Posted Using Paper EOB

ZB Mark 0-Balance EFT Matched

Select EDI Lockbox <TEST ACCOUNT> Option: APAR Auto-Post Awaiting Resolution

**Use preferred view? NO//**

(A)LL PAYERS, (R)ANGE OF PAYER NAMES: A// LL

DO YOU WANT TO SAVE THIS AS YOUR PREFERRED VIEW (Y/N)? NO//

**The user is presented with the Auto Post – Await Resolution Worklist. The selected filtering option is displayed in the header after the label ‘Current View’.**

**AUTOPOST - AWAIT RESOLUTION** Oct 05, 2016@11:47:06 Page: 1 of 1

Current View: ALL PAYERS

ERA#.Seq Claim# Posted Amt Post Date Un-posted Bal

Payer Name/ID .

THERE ARE NO EEOBs MATCHING YOUR SELECTION CRITERIA

Enter ?? for more actions

Select EEOB View/Print ERA

Change View Exit

Select Action: Quit//

**The Change View action from the APAR**

When the user selects the action CHANGE VIEW (within the APAR Worklist screen), the user is currently prompted to select new filtering criteria. With this enhancement, a new prompt will be added (‘Use preferred view’ with a default of ‘NO’ – see highlighted below) before selecting new filtering criteria. This new prompt will ONLY display if the user has an APAR Preferred view defined AND the current APAR display is NOT using the preferred view criteria. If the new prompt is not displayed, the user will be prompted to enter new filtering criteria (and optionally save it as their APAR preferred view) and the APAR will be redisplayed using the newly selected filtering criteria as before. If the user answers ‘NO’ to the ‘Use preferred view’ prompt, they will be prompted to enter new filtering criteria (and optionally save it as their APAR preferred view) and the APAR will be redisplayed using the newly selected filtering criteria. If the user answers ‘YES’ to the ‘Use preferred view’ prompt, they will NOT be prompted to enter new filtering criteria. Instead, the filtering criteria will be taken from the APAR preferred view and the APAR will be redisplayed using the newly selected filtering criteria.

Select Action: Quit// CHANGE Change View

**Use preferred view? NO//**

(A)LL PAYERS, (R)ANGE OF PAYER NAMES: A// LL

DO YOU WANT TO SAVE THIS AS YOUR PREFERRED VIEW (Y/N)? NO//

**Resolution – Added Changed Objects**

| Routines | Activities | | | |
| --- | --- | --- | --- | --- |
| **Routine Name** | RCDPEWL | | | |
| **Enhancement Category** | New | Modify | Delete | No Change |
| **RTM** |  | | | |
| **Related Options** |  | | | |

| Related Routines | Routines “Called By” | Routines “Called” |
| --- | --- | --- |
|  | RCDPEAA3  RCDPEAP  RCDPEWL0  RCDPEWL1  RCDPEWL2  RCDPEWL4  RCDPEWL5  RCDPEWL6  RCDPEWLB  RCDPEWLP  RCDPETTA1 | RCDPEWL3@PARAMS  RCDPEWL3@PREA1  RCDPEWL1@BLD  RCDPEWL7@WL  RCDPEWLA@ADDLINES  RCDPEWLA@PARAMS |

| **Current Logic** |
| --- |
| EN ; Main entry point  N RCFASTXT,DA,DIC,X,Y,RCERA,RCNOED  D FULL^VALM1  ;  S DIR(0)="SA^L:LIST;S:SPECIFIC",DIR("A")="DO YOU WANT A (L)IST OF ERAs OR A (S)PECIFIC ONE?: "  S DIR("B")="LIST" W ! D ^DIR K DIR I $D(DTOUT)!$D(DUOUT) G ENQ  I Y="S" D  G ENQ  . S DIC="^RCY(344.4,",DIC(0)="AEMQ" D ^DIC  . I Y>0 D WL^RCDPEWL7(+Y)  ; Calling Change View API in Menu Option Mode  D PARAMS^RCDPEWL0("MO") I $G(RCQUIT) G ENQ  D EN^VALM("RCDPE WORKLIST ERA LIST")  ; ENQ Q  ;  .  .  . |

| **Modified Logic (Changes are in bold)** |
| --- |
| EN ; Main entry point  N RCFASTXT,DA,DIC,X,Y,RCERA,RCNOED,RCQUIT  D FULL^VALM1  ;  S DIR(0)="SA^L:LIST;S:SPECIFIC",DIR("A")="DO YOU WANT A (L)IST OF ERAs OR A (S)PECIFIC ONE?: "  S DIR("B")="LIST" W ! D ^DIR K DIR I $D(DTOUT)!$D(DUOUT) G ENQ  I Y="S" D  G ENQ  . S DIC="^RCY(344.4,",DIC(0)="AEMQ" D ^DIC  . I Y>0 D WL^RCDPEWL7(+Y)  ; Calling Change View API in Menu Option Mode  D PARAMS^RCDPEWL0("MO") I $G(RCQUIT) G ENQ  D EN^VALM("RCDPE WORKLIST ERA LIST")  ; ENQ Q  ;  .  .  . |
|  |

| Routines | Activities | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Routine Name | RCDPEWL0 | | | | | | | |
| **Enhancement Category** | New | | Modify | Delete | | No Change | | |
| **RTM** |  | | | | | | | |
| **Related Options** |  | | | | | | | |
| Routines | Activities | | | | | | | |
| **Data Dictionary (DD) References** |  | | | | | | | |
| **Related Protocols** |  | | | | | | | |
| **Related Integration Control Registrations (ICRs)** |  | | | | | | | |
| **Data Passing** | Input | Output Reference | | | Both | | Global Reference | Local |
| **Input Attribute Name and Definition** | Name:  Definition: | | | | | | | |
| **Output Attribute Name and Definition** | Name:  Definition: | | | | | | | |

| Related Routines | Routines “Called By” | Routines “Called” |
| --- | --- | --- |
|  | RCDPEWL  RCDPEWLP | IBCECSA6@GETEOB  RCDPEARL@UP  RCDPESR0@BILLREF  RCDPESR0@DISP  RCDPEWL@NOEDIT  RCDPEWL@SEL  RCDPEWL1@PNM4  RCDPEWL3@SPLIT  RCDPEWLP@PHARM  RCDPEWLP@NOEDIT  RCDPEX31@TXT0  RCDPEX31@TXT00  RCDPEX31@TXT2 |

| **Current Logic** |
| --- |
| RCDPEWL0 ;ALB/TMK/PJH - ELECTRONIC EOB WORKLIST ACTIONS ;Jun 06, 2014@19:11:19  ;;4.5;Accounts Receivable;\*\*173,208,252,269,298\*\*;Mar 20, 1995;Build 121  ;Per VA Directive 6402, this routine should not be modified.  Q  ; PARAMS(SOURCE) ; Retrieve/Edit/Save View Parameters for ERA Worklist  ; Input: SOURCE: "MO" - Menu Option / "CV" - Change View  ;Output: ^TMP("RCERA\_PARAMS",$J,"RCPOST"): ERA Posting Status ("P":Posted/"U":Unposted)  ; ^TMP("RCERA\_PARAMS",$J,"RCAUTOP"): Auto-Posting Status ("A":Auto-Posting/"N":Non Auto-Posting/"B":Both)  ; ^TMP("RCERA\_PARAMS",$J,"RCMATCH"): ERA Matching Status ("M":Matched/"U":Unmatched)  ; ^TMP("RCERA\_PARAMS",$J,"RCTYPE"): ERA Claim Type ("M":Medical/"P":Pharmacy/"B":Both)  ; ^TMP("RCERA\_PARAMS",$J,"RCDT")p1: ERA Received EARILIST DATE (Range Limited Only)  ; ^TMP("RCERA\_PARAMS",$J,"RCDT")p2: ERA Received LATEST DATE (Range Limited Only)  ; ^TMP("RCERA\_PARAMS",$J,"RCPAYR")p1: All Payers/Range of Payers ("A": All/"R":Range of Payers)  ; ^TMP("RCERA\_PARAMS",$J,"RCPAYR")p2: START WITH PAYER (e.g.,'AET') (Range Limited Only)  ; ^TMP("RCERA\_PARAMS",$J,"RCPAYR")p3: GO TO PAYER (e.g.,'AETZ') (Range Limited Only)  ; Or RCQUIT=1  N DIR,DTOUT,DUOUT,RCAUTOPDF,RCDFR,RCDTO,RCERROR,RCMATCHD,RCPAYR,RCPAYRDF,RCPOSTDF,RCTYPEDF,RCXPAR,X,Y  ;  S RCQUIT=0  ;  ; Date Range Selection  I SOURCE="MO" D  I $G(RCQUIT) G PARAMSQ  . K ^TMP("RCERA\_PARAMS",$J) D DTR  ;  ; Retrieving user's saved parameters (If found, Quit)  I SOURCE="MO" D  I $G(RCXPAR("ERA\_POSTING\_STATUS"))'="" G PARAMSQ  . D GETLST^XPAR(.RCXPAR,"USR","RCDPE EDI LOCKBOX WORKLIST","I")  . S ^TMP("RCERA\_PARAMS",$J,"RCPOST")=$S($G(RCXPAR("ERA\_POSTING\_STATUS"))'="":RCXPAR("ERA\_POSTING\_STATUS"),1:"U")  . S ^TMP("RCERA\_PARAMS",$J,"RCAUTOP")=$S($G(RCXPAR("ERA\_AUTO\_POSTING"))'="":RCXPAR("ERA\_AUTO\_POSTING"),1:"B")  . S ^TMP("RCERA\_PARAMS",$J,"RCMATCH")=$S($G(RCXPAR("ERA-EFT\_MATCH\_STATUS"))'="":RCXPAR("ERA-EFT\_MATCH\_STATUS"),1:"B")  . S ^TMP("RCERA\_PARAMS",$J,"RCTYPE")=$S($G(RCXPAR("ERA\_CLAIM\_TYPE"))'="":RCXPAR("ERA\_CLAIM\_TYPE"),1:"B")  . S ^TMP("RCERA\_PARAMS",$J,"RCPAYR")=$S($G(RCXPAR("ALL\_PAYERS/RANGE\_OF\_PAYERS"))'="":$TR(RCXPAR("ALL\_PAYERS/RANGE\_OF\_PAYERS"),";","^"),1:"A")  ;  W !!,"Select parameters for displaying the list of ERAs"  ;  ; ERA Posting Status (Posted/Unposted/Both) Selection  S RCPOSTDF=$G(^TMP("RCERA\_PARAMS",$J,"RCPOST"))  K DIR S DIR(0)="SA^U:UNPOSTED;P:POSTED;B:BOTH",DIR("A")="ERA POSTING STATUS: (U)NPOSTED, (P)OSTED, OR (B)OTH: "  S DIR("B")="U" S:RCPOSTDF'="" DIR("B")=RCPOSTDF  W ! D ^DIR I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 G PARAMSQ  S ^TMP("RCERA\_PARAMS",$J,"RCPOST")=Y  ;  ; ERA Posting Method (Auto-Posting/Non Auto-Posting/Both) Selection  S RCAUTOPDF=$G(^TMP("RCERA\_PARAMS",$J,"RCAUTOP"))  K DIR S DIR(0)="SA^A:AUTO-POSTING;N:NON AUTO-POSTING;B:BOTH"  S DIR("A")="DISPLAY (A)UTO-POSTING, (N)ON AUTO-POSTING, OR (B)OTH: "  S DIR("B")="B" S:RCAUTOPDF'="" DIR("B")=RCAUTOPDF  W ! D ^DIR I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 G PARAMSQ  S ^TMP("RCERA\_PARAMS",$J,"RCAUTOP")=Y  ;  ; ERA-EFT Matching Status(Matched/Unmatched/Both) Selection  S RCMATCHD=$G(^TMP("RCERA\_PARAMS",$J,"RCMATCH"))  K DIR S DIR(0)="SA^N:NOT MATCHED;M:MATCHED;B:BOTH"  S DIR("A")="ERA-EFT MATCH STATUS: (N)OT MATCHED, (M)ATCHED, OR (B)OTH: "  S DIR("B")="B" S:RCMATCHD'="" DIR("B")=RCMATCHD  W ! D ^DIR I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 G PARAMSQ  S ^TMP("RCERA\_PARAMS",$J,"RCMATCH")=Y  ;  ; Claim Type (Medical/Pharmacy/Both) Selection  S RCTYPEDF=$G(^TMP("RCERA\_PARAMS",$J,"RCTYPE"))  K DIR S DIR(0)="SA^M:MEDICAL;P:PHARMACY;B:BOTH"  s DIR("A")="(M)EDICAL, (P)HARMACY, OR (B)OTH: "  S DIR("B")="B" S:RCTYPEDF'="" DIR("B")=RCTYPEDF  W ! D ^DIR I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 G PARAMSQ  S ^TMP("RCERA\_PARAMS",$J,"RCTYPE")=Y  ; PAYR ; Payer Selection  S RCPAYRDF=$G(^TMP("RCERA\_PARAMS",$J,"RCPAYR"))  K DIR S RCQUIT=0,DIR(0)="SA^A:ALL;R:RANGE",DIR("A")="(A)LL PAYERS, (R)ANGE OF PAYER NAMES: "  S DIR("B")="ALL" S:$P(RCPAYRDF,"^")'="" DIR("B")=$P(RCPAYRDF,"^")  W ! D ^DIR I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 G PARAMSQ  S RCPAYR=Y I RCPAYR="A" S ^TMP("RCERA\_PARAMS",$J,"RCPAYR")=Y  I RCPAYR="R" D  I RCQUIT K ^TMP("RCERA\_PARAMS",$J,"RCPAYR") G PAYR  . W !,"Names you select here will be the payer names from the ERA, not the ins. file"  . K DIR S DIR("?")="Enter a name from 1 to 30 characters in UPPER CASE."  . S DIR(0)="FA^1:30^K:X'?.U X",DIR("A")="START WITH PAYER NAME: "  . S:$P(RCPAYRDF,"^",2)'="" DIR("B")=$P(RCPAYRDF,"^",2)  . W ! D ^DIR I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 Q  . S RCPAYR("FROM")=Y  . K DIR S DIR("?")="Enter a name from 1 to 30 characters in UPPER CASE."  . S DIR(0)="FA^1:30^K:X'?.U X",DIR("A")="GO TO PAYER NAME: ",DIR("B")=$E(RCPAYR("FROM"),1,27)\_"ZZZ"  . S:$P(RCPAYRDF,"^",3)'="" DIR("B")=$P(RCPAYRDF,"^",3)  . W ! D ^DIR I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 Q  . S ^TMP("RCERA\_PARAMS",$J,"RCPAYR")=RCPAYR\_"^"\_RCPAYR("FROM")\_"^"\_Y  ;  ; Option to save as User Preferred View  K DIR W ! S DIR(0)="YA",DIR("B")="NO",DIR("A")="DO YOU WANT TO SAVE THIS AS YOUR PREFERRED VIEW (Y/N)? "  D ^DIR  I Y=1 D  . D EN^XPAR(DUZ\_";VA(200,","RCDPE EDI LOCKBOX WORKLIST","ERA\_POSTING\_STATUS",^TMP("RCERA\_PARAMS",$J,"RCPOST"),.RCERROR)  . D EN^XPAR(DUZ\_";VA(200,","RCDPE EDI LOCKBOX WORKLIST","ERA\_AUTO\_POSTING",^TMP("RCERA\_PARAMS",$J,"RCAUTOP"),.RCERROR)  . D EN^XPAR(DUZ\_";VA(200,","RCDPE EDI LOCKBOX WORKLIST","ERA-EFT\_MATCH\_STATUS",^TMP("RCERA\_PARAMS",$J,"RCMATCH"),.RCERROR)  . D EN^XPAR(DUZ\_";VA(200,","RCDPE EDI LOCKBOX WORKLIST","ERA\_CLAIM\_TYPE",^TMP("RCERA\_PARAMS",$J,"RCTYPE"),.RCERROR)  . D EN^XPAR(DUZ\_";VA(200,","RCDPE EDI LOCKBOX WORKLIST","ALL\_PAYERS/RANGE\_OF\_PAYERS",$TR(^TMP("RCERA\_PARAMS",$J,"RCPAYR"),"^",";"),.RCERROR)  ; PARAMSQ ; Quit  Q  ; DTR ; Date Range Selection  N DIR,DTOUT,DUOUT,Y,FROM,TO,RCDTRNG  S ^TMP("RCERA\_PARAMS",$J,"RCDT")="0^"\_DT  K DIR S DIR(0)="YA",DIR("A")="LIMIT THE SELECTION TO A DATE RANGE WHEN THE ERA WAS RECEIVED?: "  S RCQUIT=0,DIR("B")="NO"  W ! D ^DIR I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 Q  I Y D  I $G(RCQUIT) G DTR  . S FROM=$P($G(^TMP("RCERA\_PARAMS",$J,"RCDT")),"^",1),TO=$P($G(^TMP("RCERA\_PARAMS",$J,"RCDT")),"^",2)  . W ! S RCDTRNG=$$DTRANGE(FROM,TO) I RCDTRNG="^" S RCQUIT=1 Q  . S ^TMP("RCERA\_PARAMS",$J,"RCDT")=RCDTRNG  Q  ; DTRANGE(DEFFROM,DEFTO) ; Asks for and returns a Date Range  ; Input: DEFFROM - Default FROM date  ; DEFTO - Default TO date  ;Output: From\_Date^To\_Date (YYYMMDD^YYYDDMM) or "^" (timeout or ^ entered)  ;  N DIR,Y,DTOUT,DUOUT,RCDFR  S RCQUIT=0 S DIR(0)="DAE^:"\_DT\_":E",DIR("A")="EARLIEST DATE: " S:($G(DEFFROM)) DIR("B")=$$FMTE^XLFDT(DEFFROM,2) D ^DIR  I $D(DTOUT)!$D(DUOUT) Q "^"  S RCDFR=Y  K DIR S DIR(0)="DAE^"\_RCDFR\_":"\_DT\_":E",DIR("A")="LATEST DATE: " S:($G(DEFTO)) DIR("B")=$$FMTE^XLFDT(DEFTO,2) D ^DIR  I $D(DTOUT)!$D(DUOUT) Q "^"  Q (RCDFR\_"^"\_Y)  ;  .  .  . |

| **Modified Logic (Changes are in bold)** |
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| RCDPEWL0 ;ALB/TMK/PJH - ELECTRONIC EOB WORKLIST ACTIONS ;Jun 06, 2014@19:11:19  ;;4.5;Accounts Receivable;\*\*173,208,252,269,298\*\*;Mar 20, 1995;Build 121  ;Per VA Directive 6402, this routine should not be modified.  Q  ; PARAMS(SOURCE) ; Retrieve/Edit/Save View Parameters for ERA Worklist  ; Input: SOURCE: "MO" - Menu Option / "CV" - Change View  ;Output: ^TMP("RCERA\_PARAMS",$J,"RCPOST"): ERA Posting Status ("P":Posted/"U":Unposted)  ; ^TMP("RCERA\_PARAMS",$J,"RCAUTOP"): Auto-Posting Status ("A":Auto-Posting/"N":Non Auto-Posting/"B":Both)  ; ^TMP("RCERA\_PARAMS",$J,"RCMATCH"): ERA Matching Status ("M":Matched/"U":Unmatched)  ; ^TMP("RCERA\_PARAMS",$J,"RCTYPE"): ERA Claim Type ("M":Medical/"P":Pharmacy/"B":Both)  ; ^TMP("RCERA\_PARAMS",$J,"RCDT")p1: ERA Received EARILIST DATE (Range Limited Only)  ; ^TMP("RCERA\_PARAMS",$J,"RCDT")p2: ERA Received LATEST DATE (Range Limited Only)  ; ^TMP("RCERA\_PARAMS",$J,"RCPAYR")p1: All Payers/Range of Payers ("A": All/"R":Range of Payers)  ; ^TMP("RCERA\_PARAMS",$J,"RCPAYR")p2: START WITH PAYER (e.g.,'AET') (Range Limited Only)  ; ^TMP("RCERA\_PARAMS",$J,"RCPAYR")p3: GO TO PAYER (e.g.,'AETZ') (Range Limited Only)  ; Or RCQUIT=1  N DIR,DTOUT,DUOUT,RCAUTOPDF,RCDFR,RCDTO,RCERROR,RCMATCHD,RCPAYR,RCPAYRDF,RCPOSTDF,RCTYPEDF,RCXPAR,**USEPVW**,X,Y **;PRCA\*4.5\*317 Added USEPVW ;**  S RCQUIT=0  ;  ; Date Range Selection  I SOURCE="MO" D  I $G(RCQUIT) G PARAMSQ  . K ^TMP("RCERA\_PARAMS",$J) D DTR  ;  ; Retrieving user's saved parameters (If found, Quit)  I SOURCE="MO" D  I $G(RCXPAR("ERA\_POSTING\_STATUS"))'="" G PARAMSQ **D:SOURCE="MO" GETWLPVW(1,.RCXPAR)**  **;  ; Retrieve user's saved preferred view (If any)  D:SOURCE="MO" GETWLPVW(.RCXPAR)**  **;** **; Check to see if the user has a preferred view and this subroutine is being  ; called when entering from the menu option OR being called from the Change  ; View action AND the current Worklist is not using the preferred view Criteria.  I $$PREFVW(SOURCE,.RCXPAR) D  Q:USEPVW  . ;  . ; Ask the user if they want to use the preferred view  . S USEPVW=$$ASKUVW()  . Q:'USEPVW  . ;  . ; Set the Sort/Filtering Criteria from the preferred view   . D USEPVW(.RCXPAR)  ;**   W !!,"Select parameters for displaying the list of ERAs"  ;  ; ERA Posting Status (Posted/Unposted/Both) Selection  S RCPOSTDF=$G(^TMP("RCERA\_PARAMS",$J,"RCPOST"))  K DIR S DIR(0)="SA^U:UNPOSTED;P:POSTED;B:BOTH",DIR("A")="ERA POSTING STATUS: (U)NPOSTED, (P)OSTED, OR (B)OTH: "  S DIR("B")="U" S:RCPOSTDF'="" DIR("B")=RCPOSTDF  W ! D ^DIR I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 G PARAMSQ  S ^TMP("RCERA\_PARAMS",$J,"RCPOST")=Y  ;  ; ERA Posting Method (Auto-Posting/Non Auto-Posting/Both) Selection  S RCAUTOPDF=$G(^TMP("RCERA\_PARAMS",$J,"RCAUTOP"))  K DIR S DIR(0)="SA^A:AUTO-POSTING;N:NON AUTO-POSTING;B:BOTH"  S DIR("A")="DISPLAY (A)UTO-POSTING, (N)ON AUTO-POSTING, OR (B)OTH: "  S DIR("B")="B" S:RCAUTOPDF'="" DIR("B")=RCAUTOPDF  W ! D ^DIR I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 G PARAMSQ  S ^TMP("RCERA\_PARAMS",$J,"RCAUTOP")=Y  ;  ; ERA-EFT Matching Status(Matched/Unmatched/Both) Selection  S RCMATCHD=$G(^TMP("RCERA\_PARAMS",$J,"RCMATCH"))  K DIR S DIR(0)="SA^N:NOT MATCHED;M:MATCHED;B:BOTH"  S DIR("A")="ERA-EFT MATCH STATUS: (N)OT MATCHED, (M)ATCHED, OR (B)OTH: "  S DIR("B")="B" S:RCMATCHD'="" DIR("B")=RCMATCHD  W ! D ^DIR I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 G PARAMSQ  S ^TMP("RCERA\_PARAMS",$J,"RCMATCH")=Y  ;  ; Claim Type (Medical/Pharmacy/Both) Selection  S RCTYPEDF=$G(^TMP("RCERA\_PARAMS",$J,"RCTYPE"))  K DIR S DIR(0)="SA^M:MEDICAL;P:PHARMACY;B:BOTH"  s DIR("A")="(M)EDICAL, (P)HARMACY, OR (B)OTH: "  S DIR("B")="B" S:RCTYPEDF'="" DIR("B")=RCTYPEDF  W ! D ^DIR I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 G PARAMSQ  S ^TMP("RCERA\_PARAMS",$J,"RCTYPE")=Y  ; PAYR ; Payer Selection  S RCPAYRDF=$G(^TMP("RCERA\_PARAMS",$J,"RCPAYR"))  K DIR S RCQUIT=0,DIR(0)="SA^A:ALL;R:RANGE",DIR("A")="(A)LL PAYERS, (R)ANGE OF PAYER NAMES: "  S DIR("B")="ALL" S:$P(RCPAYRDF,"^")'="" DIR("B")=$P(RCPAYRDF,"^")  W ! D ^DIR I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 G PARAMSQ  S RCPAYR=Y I RCPAYR="A" S ^TMP("RCERA\_PARAMS",$J,"RCPAYR")=Y  I RCPAYR="R" D  I RCQUIT K ^TMP("RCERA\_PARAMS",$J,"RCPAYR") G PAYR  . W !,"Names you select here will be the payer names from the ERA, not the ins. file"  . K DIR S DIR("?")="Enter a name from 1 to 30 characters in UPPER CASE."  . S DIR(0)="FA^1:30^K:X'?.U X",DIR("A")="START WITH PAYER NAME: "  . S:$P(RCPAYRDF,"^",2)'="" DIR("B")=$P(RCPAYRDF,"^",2)  . W ! D ^DIR I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 Q  . S RCPAYR("FROM")=Y  . K DIR S DIR("?")="Enter a name from 1 to 30 characters in UPPER CASE."  . S DIR(0)="FA^1:30^K:X'?.U X",DIR("A")="GO TO PAYER NAME: ",DIR("B")=$E(RCPAYR("FROM"),1,27)\_"ZZZ"  . S:$P(RCPAYRDF,"^",3)'="" DIR("B")=$P(RCPAYRDF,"^",3)  . W ! D ^DIR I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 Q  . S ^TMP("RCERA\_PARAMS",$J,"RCPAYR")=RCPAYR\_"^"\_RCPAYR("FROM")\_"^"\_Y  ;  ; Option to save as User Preferred View  K DIR W ! S DIR(0)="YA",DIR("B")="NO",DIR("A")="DO YOU WANT TO SAVE THIS AS YOUR PREFERRED VIEW (Y/N)? "  D ^DIR  I Y=1 D  . D EN^XPAR(DUZ\_";VA(200,","RCDPE EDI LOCKBOX WORKLIST","ERA\_POSTING\_STATUS",^TMP("RCERA\_PARAMS",$J,"RCPOST"),.RCERROR)  . D EN^XPAR(DUZ\_";VA(200,","RCDPE EDI LOCKBOX WORKLIST","ERA\_AUTO\_POSTING",^TMP("RCERA\_PARAMS",$J,"RCAUTOP"),.RCERROR)  . D EN^XPAR(DUZ\_";VA(200,","RCDPE EDI LOCKBOX WORKLIST","ERA-EFT\_MATCH\_STATUS",^TMP("RCERA\_PARAMS",$J,"RCMATCH"),.RCERROR)  . D EN^XPAR(DUZ\_";VA(200,","RCDPE EDI LOCKBOX WORKLIST","ERA\_CLAIM\_TYPE",^TMP("RCERA\_PARAMS",$J,"RCTYPE"),.RCERROR)  . D EN^XPAR(DUZ\_";VA(200,","RCDPE EDI LOCKBOX WORKLIST","ALL\_PAYERS/RANGE\_OF\_PAYERS",$TR(^TMP("RCERA\_PARAMS",$J,"RCPAYR"),"^",";"),.RCERROR)  ; PARAMSQ ; Quit  Q  ; DTR ; Date Range Selection  N DIR,DTOUT,DUOUT,Y,FROM,TO,RCDTRNG  S ^TMP("RCERA\_PARAMS",$J,"RCDT")="0^"\_DT  K DIR S DIR(0)="YA",DIR("A")="LIMIT THE SELECTION TO A DATE RANGE WHEN THE ERA WAS RECEIVED?: "  S RCQUIT=0,DIR("B")="NO"  W ! D ^DIR I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 Q  I Y D  I $G(RCQUIT) G DTR  . S FROM=$P($G(^TMP("RCERA\_PARAMS",$J,"RCDT")),"^",1),TO=$P($G(^TMP("RCERA\_PARAMS",$J,"RCDT")),"^",2)  . W ! S RCDTRNG=$$DTRANGE(FROM,TO) I RCDTRNG="^" S RCQUIT=1 Q  . S ^TMP("RCERA\_PARAMS",$J,"RCDT")=RCDTRNG  Q  ; DTRANGE(DEFFROM,DEFTO) ; Asks for and returns a Date Range  ; Input: DEFFROM - Default FROM date  ; DEFTO - Default TO date  ;Output: From\_Date^To\_Date (YYYMMDD^YYYDDMM) or "^" (timeout or ^ entered)  ;  N DIR,Y,DTOUT,DUOUT,RCDFR  S RCQUIT=0 S DIR(0)="DAE^:"\_DT\_":E",DIR("A")="EARLIEST DATE: " S:($G(DEFFROM)) DIR("B")=$$FMTE^XLFDT(DEFFROM,2) D ^DIR  I $D(DTOUT)!$D(DUOUT) Q "^"  S RCDFR=Y  K DIR S DIR(0)="DAE^"\_RCDFR\_":"\_DT\_":E",DIR("A")="LATEST DATE: " S:($G(DEFTO)) DIR("B")=$$FMTE^XLFDT(DEFTO,2) D ^DIR  I $D(DTOUT)!$D(DUOUT) Q "^"  Q (RCDFR\_"^"\_Y)  ;  **GETWLPVW(RCXPAR) ; Retrieves the preferred view settings for the ERA worklist  ; for the user  ; Input: None  ; Output: RCXPAR() - Array of preferred view sort/filter criteria  ; ^TMP("RCERA\_PARAMS,$) - Global array of preferred view settings  N XX  D GETLST^XPAR(.RCXPAR,"USR","RCDPE EDI LOCKBOX WORKLIST","I")  S XX=$G(RCXPAR("ERA\_POSTING\_STATUS"))  S ^TMP("RCERA\_PARAMS",$J,"RCPOST")=$S(XX'="":XX,1:"U")  S XX=$G(RCXPAR("ERA\_AUTO\_POSTING"))  S ^TMP("RCERA\_PARAMS",$J,"RCAUTOP")=$S(XX'="":XX,1:"B")  S XX=$G(RCXPAR("ERA-EFT\_MATCH\_STATUS"))  S ^TMP("RCERA\_PARAMS",$J,"RCMATCH")=$S(XX'="":XX,1:"B")  S XX=$G(RCXPAR("ERA\_CLAIM\_TYPE"))  S ^TMP("RCERA\_PARAMS",$J,"RCTYPE")=$S(XX'="":XX,1:"B")  S XX=$G(RCXPAR("ALL\_PAYERS/RANGE\_OF\_PAYERS"))  S ^TMP("RCERA\_PARAMS",$J,"RCPAYR")=$S(XX'="":$TR(XX,";","^"),1:"A")  Q  ; PREFVW(SOURCE,RCXPAR) ; Checks to see if the user has a preferred view  ; PRCA\*4.5\*317 added subroutine  ; When source is 'CV', checks to see if the preferred view is being used  ; Input: SOURCE - 'MO' - When called from the Worklist menu  ; option  ; 'CV' - When called from the Change View  ; action  ; RCXPAR - Array of preferred view values  ; ^TMP("RCERA\_PARAMS") - Global array of currently in use defaults  ; Returns: 1 - User has preferred view if SOURCE is 'MO' or is using  ; their preferred view if SOURCE is 'CV'  ; 0 - User does not have preferred view or is not using it  I SOURCE="MO" Q $S($D(RCXPAR("ERA\_POSTING\_STATUS")):1,1:0)  Q:'$D(RCXPAR("ERA\_POSTING\_STATUS")) 0 ; No stored preferred view  Q:$G(^TMP("RCERA\_PARAMS",$J,"RCPOST"))'=$G(RCXPAR("ERA\_POSTING\_STATUS")) 0  Q:$G(^TMP("RCERA\_PARAMS",$J,"RCAUTOP"))'=$G(RCXPAR("ERA\_AUTO\_POSTING")) 0  Q:$G(^TMP("RCERA\_PARAMS",$J,"RCMATCH"))'=$G(RCXPAR("ERA-EFT\_MATCH\_STATUS")) 0  Q:$G(^TMP("RCERA\_PARAMS",$J,"RCTYPE"))'=$G(RCXPAR("ERA\_CLAIM\_TYPE")) 0  Q:$G(^TMP("RCERA\_PARAMS",$J,"RCPAYR"))'=$G(RCXPAR("ALL\_PAYERS/RANGE\_OF\_PAYERS")) 0  Q  ; ASKUVW() ; Prompts the user to see if they want to use their preferred view  ; PRCA\*4.5\*317 added function  ; Input: None  ; Returns: 1 - User wants to use their preferred view  ; 0 - User does not want to use their preferred view  ; -1 - User typed '^'  N DIR,DTOUT,DUOUT  S DIR(0)="Y"  S DIR("A")="Use preferred view? "  S DIR("B")="N"  W !  D ^DIR  I $D(DTOUT)!$D(DUOUT) Q 1  Q:Y="Y" 1  Q 0  ; USEPVW(RCXPAR) ; Set the worklist settings from the preferred view  ; PRCA\*4.5\*317 added function  ; Input: RCXPAR - Array of preferred values (if any)  ; Output: ^TMP("RCERA\_PARAMS") - Global Array of current worklist settings  S ^TMP("RCERA\_PARAMS",$J,"RCPOST")=$G(RCXPAR("ERA\_POSTING\_STATUS"))  S ^TMP("RCERA\_PARAMS",$J,"RCAUTOP")=$G(RCXPAR("ERA\_AUTO\_POSTING"))  S ^TMP("RCERA\_PARAMS",$J,"RCMATCH")=$G(RCXPAR("ERA-EFT\_MATCH\_STATUS"))  S ^TMP("RCERA\_PARAMS",$J,"RCTYPE")=$G(RCXPAR("ERA\_CLAIM\_TYPE"))  S ^TMP("RCERA\_PARAMS",$J,"RCPAYR")=$G(RCXPAR("ALL\_PAYERS/RANGE\_OF\_PAYERS"))  Q  ;**  .  .  . |

| Routines | Activities | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Routine Name | RCDPEWLA | | | | | | | |
| **Enhancement Category** | New | | Modify | Delete | | No Change | | |
| **RTM** |  | | | | | | | |
| **Related Options** |  | | | | | | | |
| Routines | Activities | | | | | | | |
| **Data Dictionary (DD) References** |  | | | | | | | |
| **Related Protocols** |  | | | | | | | |
| **Related Integration Control Registrations (ICRs)** |  | | | | | | | |
| **Data Passing** | Input | Output Reference | | | Both | | Global Reference | Local |
| **Input Attribute Name and Definition** | Name:  Definition: | | | | | | | |
| **Output Attribute Name and Definition** | Name:  Definition: | | | | | | | |

| Related Routines | Routines “Called By” | Routines “Called” |
| --- | --- | --- |
|  | RCDPEWL | RCDPEV@VER |

| **Current Logic** |
| --- |
| **.**  .  .  PARAMS(SOURCE) ; Retrieve/Edit/Save View Parameters for EEOB Scratchpad Worklist  ; Input: SOURCE: "MO" - Menu Option / "CV" - Change View  ;Output: ^TMP("RC\_SORTPARM",$J): Order of Payment ("N":No Order/"F":Zero-Payments First/"L":Zero-Payments Last)  ; ^TMP("RC\_EEOBPOST",$J): EEOB Posting Status ("P":Posted/"U":Unposted/"B":Both)  ; Or RCQUIT=1  N DIR,X,Y,DUOUT,DTOUT,RCPOSTDF,F,RCXPAR,RCERROR  ;  D GETLST^XPAR(.RCXPAR,"USR","RCDPE EDI LOCKBOX WORKLIST","I")  S RCQUIT=0  ;  ; Setting ^TMP with user's saved parameters or System defaults  I '$D(^TMP($J,"RC\_SORTPARM")) D  . S ^TMP($J,"RC\_SORTPARM")=$S($G(RCXPAR("ORDER\_OF\_PAYMENTS"))'="":RCXPAR("ORDER\_OF\_PAYMENTS"),1:"N")  . S ^TMP($J,"RC\_EEOBPOST")=$S($G(RCXPAR("EEOB\_POSTING\_STATUS"))'="":RCXPAR("EEOB\_POSTING\_STATUS"),1:"U")  ;  ; Not coming from Change View action, User Preferences Found, Quit I SOURCE="MO",$G(RCXPAR("EEOB\_POSTING\_STATUS"))'="" Q  ;  ; ORDER OF PAYMENT (No Order/Zero Payment First/Zero Payment Last) Selection  S RCSORTBY=$G(^TMP($J,"RC\_SORTPARM"))  K DIR S DIR(0)="SA^N:NO ORDER;F:ZERO-PAYMENTS FIRST;L:ZERO-PAYMENTS LAST"  S DIR("A")="ORDER OF PAYMENT: (N)O ORDER, ZERO-PAYMENTS (F)IRST, ZERO-PAYMENTS (L)AST: "  S DIR("B")="B" S:RCSORTBY'="" DIR("B")=RCSORTBY  W ! D ^DIR  I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 G PARAMSQ  S ^TMP($J,"RC\_SORTPARM")=Y  ;  ; EEOB Posting Status (Posted/Unposted/Both) Selection  S RCPOSTDF=$G(^TMP($J,"RC\_EEOBPOST"))  K DIR S DIR(0)="SA^U:UNPOSTED;P:POSTED;A:ALL"  S DIR("A")="DISPLAY FOR AUTO-POSTED ERAS: (U)NPOSTED EEOBs, (P)OSTED EEOBs, OR (A)LL: "  S DIR("B")="U" S:RCPOSTDF'="" DIR("B")=RCPOSTDF  W ! D ^DIR I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 G PARAMSQ  S ^TMP($J,"RC\_EEOBPOST")=Y  ;  ; - Save as Preferred View?  K DIR W ! S DIR(0)="YA",DIR("B")="NO",DIR("A")="DO YOU WANT TO SAVE THIS AS YOUR PREFERRED VIEW (Y/N)? "  D ^DIR  I Y=1 D  . D EN^XPAR(DUZ\_";VA(200,","RCDPE EDI LOCKBOX WORKLIST","ORDER\_OF\_PAYMENTS",^TMP($J,"RC\_SORTPARM"),.RCERROR)  . D EN^XPAR(DUZ\_";VA(200,","RCDPE EDI LOCKBOX WORKLIST","EEOB\_POSTING\_STATUS",^TMP($J,"RC\_EEOBPOST"),.RCERROR)  ; PARAMSQ ; Quit  Q |

| **Modifed Logic** |
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| **.**  **.**  **.**  PARAMS(SOURCE) ; Retrieve/Edit/Save View Parameters for EEOB Scratchpad Worklist  ; Input: SOURCE: "MO" - Menu Option / "CV" - Change View  ;Output: ^TMP("RC\_SORTPARM",$J): Order of Payment ("N":No Order/"F":Zero-Payments First/"L":Zero-Payments Last)  ; ^TMP("RC\_EEOBPOST",$J): EEOB Posting Status ("P":Posted/"U":Unposted/"B":Both)  ; Or RCQUIT=1 **N F,RCXPAR,USEPVW,X,XX,Y                   ; PRCA\*4.5\*317 added USEPVW,XX**   ;  D GETLST^XPAR(.RCXPAR,"USR","RCDPE EDI LOCKBOX WORKLIST","I")  S RCQUIT=0  ;  ; Setting ^TMP with user's saved parameters or System defaults  I '$D(^TMP($J,"RC\_SORTPARM")) D  . S ^TMP($J,"RC\_SORTPARM")=$S($G(RCXPAR("ORDER\_OF\_PAYMENTS"))'="":RCXPAR("ORDER\_OF\_PAYMENTS"),1:"N")  . S ^TMP($J,"RC\_EEOBPOST")=$S($G(RCXPAR("EEOB\_POSTING\_STATUS"))'="":RCXPAR("EEOB\_POSTING\_STATUS"),1:"U") **;  ; PRCA\*4.5\*317 Start of added lines  ; Ask the user if they want to use the preferred view  S USEPVW=0  S:$G(RCXPAR("EEOB\_POSTING\_STATUS")) USEPVW=$$ASKUVW^RCDPEWLA()  Q:'USEPVW  ; PRCA\*4.5\*317 End of Added lines**  **;**; Not coming from Change View action, User Preferences Found, Quit **; PRCA\*4.5\*317 Replaced $G(RCXPAR("EEOB\_POSTING\_STATUS"))'="" with USEPVW below  I SOURCE="MO",USEPVW Q**  ;  ; ORDER OF PAYMENT (No Order/Zero Payment First/Zero Payment Last) Selection  S RCSORTBY=$G(^TMP($J,"RC\_SORTPARM"))  K DIR S DIR(0)="SA^N:NO ORDER;F:ZERO-PAYMENTS FIRST;L:ZERO-PAYMENTS LAST"  S DIR("A")="ORDER OF PAYMENT: (N)O ORDER, ZERO-PAYMENTS (F)IRST, ZERO-PAYMENTS (L)AST: "  S DIR("B")="B" S:RCSORTBY'="" DIR("B")=RCSORTBY  W ! D ^DIR  I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 G PARAMSQ  S ^TMP($J,"RC\_SORTPARM")=Y ;  ; EEOB Posting Status (Posted/Unposted/Both) Selection  S RCPOSTDF=$G(^TMP($J,"RC\_EEOBPOST"))  K DIR S DIR(0)="SA^U:UNPOSTED;P:POSTED;A:ALL"  S DIR("A")="DISPLAY FOR AUTO-POSTED ERAS: (U)NPOSTED EEOBs, (P)OSTED EEOBs, OR (A)LL: "  S DIR("B")="U" S:RCPOSTDF'="" DIR("B")=RCPOSTDF  W ! D ^DIR I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 G PARAMSQ  S ^TMP($J,"RC\_EEOBPOST")=Y  ;  ; - Save as Preferred View?  K DIR W ! S DIR(0)="YA",DIR("B")="NO",DIR("A")="DO YOU WANT TO SAVE THIS AS YOUR PREFERRED VIEW (Y/N)? "  D ^DIR  I Y=1 D  . D EN^XPAR(DUZ\_";VA(200,","RCDPE EDI LOCKBOX WORKLIST","ORDER\_OF\_PAYMENTS",^TMP($J,"RC\_SORTPARM"),.RCERROR)  . D EN^XPAR(DUZ\_";VA(200,","RCDPE EDI LOCKBOX WORKLIST","EEOB\_POSTING\_STATUS",^TMP($J,"RC\_EEOBPOST"),.RCERROR)  ; PARAMSQ ; Quit  Q |

| Routines | Activities | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Routine Name | RCDPEAA1 | | | | | | | |
| **Enhancement Category** | New | | Modify | Delete | | No Change | | |
| **RTM** |  | | | | | | | |
| **Related Options** |  | | | | | | | |
| Routines | Activities | | | | | | | |
| **Data Dictionary (DD) References** |  | | | | | | | |
| **Related Protocols** |  | | | | | | | |
| **Related Integration Control Registrations (ICRs)** |  | | | | | | | |
| **Data Passing** | Input | Output Reference | | | Both | | Global Reference | Local |
| **Input Attribute Name and Definition** | Name:  Definition: | | | | | | | |
| **Output Attribute Name and Definition** | Name:  Definition: | | | | | | | |

| Related Routines | Routines “Called By” | Routines “Called” |
| --- | --- | --- |
|  | RCDPEAA2 | RCDPEARL@UP |

| **Current Logic** |
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| .  .  .  PARAMS(SOURCE) ; Retrieve/Edit/Save View Parameters for APAR EEOB Worklist  ; Input: SOURCE: "MO" - Menu Option / "CV" - Change View  ;Output:   ; ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR")p1: All Payers/Range of Payers ("A": All/"R":Range of Payers)  ; ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR")p2: START WITH PAYER (e.g.,'AET') (Range Limited Only)  ; ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR")p3: GO TO PAYER (e.g.,'AETZ') (Range Limited Only)  ; ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCMEDRX""): (M)edical, (P)harmacy, or (B)  ;  ; Or RCQUIT=1  N DIR,X,Y,DUOUT,DTOUT,RCPAYR,RCPAYRDF,RCXPAR,RCDRLIM,RCERROR,RCAUTOPDF  N RCTYPEDF,RCQ  ;  ; Retrieving user's saved parameters (If found, Quit)  I SOURCE="MO" D  I $G(RCXPAR("ALL\_PAYERS/RANGE\_OF\_PAYERS"))'="" G PARAMSQ  . K ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J)  . D GETLST^XPAR(.RCXPAR,"USR","RCDPE APAR","I")  . S ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR")=$S($G(RCXPAR("ALL\_PAYERS/RANGE\_OF\_PAYERS"))'="":$TR(RCXPAR("ALL\_PAYERS/RANGE\_OF\_PAYERS"),";","^"),1:"A")  . S ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCMEDRX")=$S($G(RCXPAR("MEDICAL/PHARMACY"))'="":$TR(RCXPAR("MEDICAL/PHARMACY"),";","^"),1:"B")  ;  ; PAYR ; Payer Selection  S RCPAYRDF=$G(^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR")),RCQUIT=0  K DIR S DIR(0)="SA^A:ALL;R:RANGE",DIR("A")="(A)LL PAYERS, (R)ANGE OF PAYER NAMES: "  S DIR("B")="ALL" S:$P(RCPAYRDF,"^")'="" DIR("B")=$P(RCPAYRDF,"^")  W ! D ^DIR  I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 G PARAMSQ  S RCPAYR=Y I RCPAYR="A" S ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR")=Y  I RCPAYR="R" D  I RCQUIT K ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR") G PARAMSQ  . W !,"NAMES YOU SELECT HERE WILL BE THE PAYER NAMES FROM THE ERA, NOT THE INS FILE"  . K DIR S DIR("?")="ENTER A NAME BETWEEN 1 AND 30 CHARACTERS IN UPPERCASE"  . S DIR(0)="FA^1:30^K:X'?.U X",DIR("A")="START WITH PAYER NAME: "  . S:$P(RCPAYRDF,"^",2)'="" DIR("B")=$P(RCPAYRDF,"^",2)  . W ! D ^DIR  . I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 Q  . S RCPAYR("FROM")=Y  . K DIR S DIR("?")="ENTER A NAME BETWEEN 1 AND 30 CHARACTERS IN UPPERCASE"  . S DIR(0)="FA^1:30^K:X'?.U X",DIR("A")="GO TO PAYER NAME: ",DIR("B")=$E(RCPAYR("FROM"),1,27)\_"ZZZ"  . W ! D ^DIR K DIR  . I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 Q  . S ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR")=RCPAYR\_"^"\_RCPAYR("FROM")\_"^"\_Y  ;  ; Ask for Medical or Pharmacy (Or Both)  N DEF  S DEF=$G(^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCMEDRX"))  S DEF=$S(DEF="P":"PHARMACY",DEF="M":"MEDICAL",1:"BOTH")  S RCQ=$$RTYPE^RCDPESP2(DEF) I RCQ=-1 S RCQUIT=1 G PARAMSQ  S ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCMEDRX")=RCQ  ;  ; Option to save as User Preferred View  K DIR W ! S DIR(0)="YA",DIR("B")="NO",DIR("A")="DO YOU WANT TO SAVE THIS AS YOUR PREFERRED VIEW (Y/N)? "  D ^DIR  I Y=1 D  . D EN^XPAR(DUZ\_";VA(200,","RCDPE APAR","ALL\_PAYERS/RANGE\_OF\_PAYERS",$TR(^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR"),"^",";"),.RCERROR)  . D EN^XPAR(DUZ\_";VA(200,","RCDPE APAR","MEDICAL/PHARMACY",$TR(^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCMEDRX"),"^",";"),.RCERROR)  ; PARAMSQ ; Quit  Q  ;  .  .  . |

| **Modified Logic** |
| --- |
| .  .  .  PARAMS(SOURCE) ; Retrieve/Edit/Save View Parameters for APAR EEOB Worklist  ; Input: SOURCE: "MO" - Menu Option / "CV" - Change View  ;Output:   ; ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR")p1: All Payers/Range of Payers ("A": All/"R":Range of Payers)  ; ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR")p2: START WITH PAYER (e.g.,'AET') (Range Limited Only)  ; ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR")p3: GO TO PAYER (e.g.,'AETZ') (Range Limited Only)  ; ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCMEDRX""): (M)edical, (P)harmacy, or (B)  ;  ; Or RCQUIT=1 **N RCXPAR,USEPVW                            ; PRCA\*4.5\*317 added USEPVW  S RCQUIT=0**  **;  ; Retrieve user's saved preferred view (If any)  D:SOURCE="MO" GETPVW(.RCXPAR)  ;  ; Check to see if the user has a preferred view and this subroutine is being  ; called when entering from the menu option OR being called from the Change  ; View action AND the current Worklist is not using the preferred view Criteria.  I $$PREFVW(SOURCE,.RCXPAR) D  Q:USEPVW  . ;  . ; Ask the user if they want to use the preferred view  . S USEPVW=$$ASKUVW^RCDPEWL0()  . Q:'USEPVW  . ;  . ; Set the Sort/Filtering Criteria from the preferred view   . D USEPVW(.RCXPAR)  ;**   D PAYR  Q  **;** **GETPVW(RCXPAR) ; Retrieves the preferred view settings for the APAR worklist  ; for the user  ; PRCA\*4.5\*317 - Added subroutine  ; Input: None  ; Output: RCXPAR() - Array of preferred view sort/filter criteria  ; ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$)- Global array of preferred view settings  N XX  K ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J)  D GETLST^XPAR(.RCXPAR,"USR","RCDPE APAR","I")  S XX=$G(RCXPAR("ALL\_PAYERS/RANGE\_OF\_PAYERS"))  S ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR")=$S(XX'="":$TR(XX,";","^"),1:"A")  S XX=$G(RCXPAR("MEDICAL/PHARMACY"))  S ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCMEDRX")=$S(XX'="":$TR(XX,";","^"),1:"B")  Q  ; PREFVW(SOURCE,RCXPAR) ; Checks to see if the user has a preferred view  ; PRCA\*4.5\*317 added subroutine  ; When source is 'CV', checks to see if the preferred view is being used  ; Input: SOURCE - 'MO' - When called from the Lockbox menu  ; option  ; 'CV' - When called from the Change View  ; action  ; RCXPAR - Array of preferred view values  ; ^TMP("RCDPE\_APAR\_EEOB\_PARAMS")- Global array of currently in use defaults  ; Returns: 1 - User has preferred view if SOURCE is 'MO' or is using  ; their preferred view if SOURCE is 'CV'  ; 0 - User does not have preferred view or is not using it  N XX  I SOURCE="MO" Q $S($D(RCXPAR("ALL\_PAYERS/RANGE\_OF\_PAYERS")):1,1:0)  Q:'$D(RCXPAR("ALL\_PAYERS/RANGE\_OF\_PAYERS")) 0 ; No stored preferred view  S XX=$G(RCXPAR("ALL\_PAYERS/RANGE\_OF\_PAYERS"))  Q:$G(^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR"))'=XX 0  S XX=$G(RCXPAR("MEDICAL/PHARMACY"))  Q:$G(^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCMEDX"))'=XX 0  Q 1  ; USEPVW(RCXPAR) ; Set the worklist settings from the preferred view  ; PRCA\*4.5\*317 added function  ; Input: RCXPAR - Array of preferred values (if any)  ; Output: ^TMP("RCDPE\_APAR\_EEOB\_PARAMS") - Global Array of current worklist settings  S ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR")=$G(RCXPAR("ALL\_PAYERS/RANGE\_OF\_PAYERS"))  S ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCMEDX")=$G(RCXPAR("MEDICAL/PHARMACY"))  S ^TMP("RCERA\_PARAMS",$J,"RCMATCH")=$G(RCXPAR("ERA-EFT\_MATCH\_STATUS"))  S ^TMP("RCERA\_PARAMS",$J,"RCTYPE")=$G(RCXPAR("ERA\_CLAIM\_TYPE"))  S ^TMP("RCERA\_PARAMS",$J,"RCPAYR")=$G(RCXPAR("ALL\_PAYERS/RANGE\_OF\_PAYERS"))  Q**; PAYR ; Payer Selection  S RCPAYRDF=$G(^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR")),RCQUIT=0  K DIR S DIR(0)="SA^A:ALL;R:RANGE",DIR("A")="(A)LL PAYERS, (R)ANGE OF PAYER NAMES: "  S DIR("B")="ALL" S:$P(RCPAYRDF,"^")'="" DIR("B")=$P(RCPAYRDF,"^")  W ! D ^DIR  I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 G PARAMSQ  S RCPAYR=Y I RCPAYR="A" S ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR")=Y  I RCPAYR="R" D  I RCQUIT K ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR") G PARAMSQ  . W !,"NAMES YOU SELECT HERE WILL BE THE PAYER NAMES FROM THE ERA, NOT THE INS FILE"  . K DIR S DIR("?")="ENTER A NAME BETWEEN 1 AND 30 CHARACTERS IN UPPERCASE"  . S DIR(0)="FA^1:30^K:X'?.U X",DIR("A")="START WITH PAYER NAME: "  . S:$P(RCPAYRDF,"^",2)'="" DIR("B")=$P(RCPAYRDF,"^",2)  . W ! D ^DIR  . I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 Q  . S RCPAYR("FROM")=Y  . K DIR S DIR("?")="ENTER A NAME BETWEEN 1 AND 30 CHARACTERS IN UPPERCASE"  . S DIR(0)="FA^1:30^K:X'?.U X",DIR("A")="GO TO PAYER NAME: ",DIR("B")=$E(RCPAYR("FROM"),1,27)\_"ZZZ"  . W ! D ^DIR K DIR  . I $D(DTOUT)!$D(DUOUT) S RCQUIT=1 Q  . S ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR")=RCPAYR\_"^"\_RCPAYR("FROM")\_"^"\_Y  ;  ; Ask for Medical or Pharmacy (Or Both)  N DEF  S DEF=$G(^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCMEDRX"))  S DEF=$S(DEF="P":"PHARMACY",DEF="M":"MEDICAL",1:"BOTH")  S RCQ=$$RTYPE^RCDPESP2(DEF) I RCQ=-1 S RCQUIT=1 G PARAMSQ  S ^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCMEDRX")=RCQ  ;  ; Option to save as User Preferred View  K DIR W ! S DIR(0)="YA",DIR("B")="NO",DIR("A")="DO YOU WANT TO SAVE THIS AS YOUR PREFERRED VIEW (Y/N)? "  D ^DIR  I Y=1 D  . D EN^XPAR(DUZ\_";VA(200,","RCDPE APAR","ALL\_PAYERS/RANGE\_OF\_PAYERS",$TR(^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCPAYR"),"^",";"),.RCERROR)  . D EN^XPAR(DUZ\_";VA(200,","RCDPE APAR","MEDICAL/PHARMACY",$TR(^TMP("RCDPE\_APAR\_EEOB\_PARAMS",$J,"RCMEDRX"),"^",";"),.RCERROR)  ; PARAMSQ ; Quit  Q  ;  .  .  . |

1. Technical note for programmer: routine ^RCDPEWL [↑](#footnote-ref-1)