**User Story ID:** US325

**User Story Name:**  Auto-Post Manual Match for ERA/EFT

**Priority (H, M, L):**

**Sizing: 8**

**Author:** Chad Morrison

# Story

As an ePayments user, I want all ERAs and EFTs to auto-post that meet the auto-posting criteria. If the ERA/EFTs have been manually matched, I want these to auto post if appropriate. If the ERA has a CHK payment type and a EFT or a manufactured EFT associated with it, I want the ability to 'mark' these for auto posting. The software should auto-post these when applicable even though the payment type is CHK on the ERA. All auto posting criteria should still apply

# Conversation

Option – Manual Match EFT/ERA [RCDPE MANUAL MATCH EFT-ERA]

Nightly auto-post processing

Needs ERA validation of ERA prior to auto-posting

Excludes Pharmacy

5/10/17

**Question (Peter):**

If we allow for CHK type ERA to be autoposted if marked for autopost manually (currently only ACH is allowed) we don't actually show ERA type on Worklist or Reports. Might be an issue, might not. **Answer:** Not an issue

For example; CHK type manually marked for autopost then goes to APAR.

# Detailed Listing of Acceptance Criteria

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| --- | --- | --- |
| Requirement ID | Description | External Dependency  (Y/N)  If Y, provide organization and description |
| US325.1 | The Manual Match EFT-ERA menu option on the Clerk’s AR Menu must allow the CHK type ERA to be marked for auto-post | N |
| US325.2 | The Manual Match Option in the ERA Worklist must allow the CHK type ERA to be marked for auto-post | N |
| US325.3 | All ERAs and EFTs that meet the auto-posting criteria must still auto-post. |  |
| US324.4 | CHK type ERAs will only auto-post if they have been manually marked for auto-posting |  |

# Constraints

N/A

# Risks

N/A

# Assumptions

N/A

# Dependencies/Impacts Outside of VistA

N/A

# Approval Signatures

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**Revision History**

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| --- | --- | --- | --- |
| Date | Version | Description | Author |
| 5/16/2017 | v1.0 | Final version for submission | Team Leidos |
| 4/12/2017 | v0.01 | Original / Initial | Chad Morrison |