



# **User Guide: MSP Portal Enhancements**



## Introduction

RMA's MSP Portal has been enhanced to improve the management of workflow notifications by introducing additional filtering options. This should allow users to manage their workflows more efficiently.

### Filtering Enhancements

The following screen displays the **new filtering enhancements for Healthcare Providers**.

The screenshot shows the MSP Portal interface with a navigation bar at the top containing icons for ClientCare, CompCare, PensCare, Medicare, Admin, FinCare, and ContactCare. The main content area displays a list of records with the following details:

- Records 1-2 of 2
- Page 1 of 1
- Select Page Size: 10
- Filter options: Reset filters
- Advanced search: Description contains: [text]
- User inbox: [text]

Assigned to	Created By	Description	Date Sent	Alert Date	Due Date	Priority	Claim No.	Event No.	Application	Action
<input type="checkbox"/>	Ncedo Mdingi	Medical Invoice Has Been Pended For Invoice Number: [text] With Reason: No Pre Authorisation found after two years	04 Nov 2016 10:18:35:047	04 Nov 2016 10:18:35:047	19 Nov 2016 23:59:59:000	P1		200792	MediCare	[icon]
<input type="checkbox"/>	Ncedo Mdingi	Medical Invoice Has Been Rejected For Invoice Number: [text] With Reason: Service not covered / Not RMA Liability	04 Nov 2016 10:20:05:960	04 Nov 2016 10:20:05:960	19 Nov 2016 23:59:59:000	P1		200792	MediCare	[icon]
<input type="checkbox"/>	Ncedo Mdingi	Medical Invoice Has Been Pended For Invoice Number: [text] With Reason: No Pre Authorisation found after two years	04 Nov 2016 10:18:35:047	04 Nov 2016 10:18:35:047	19 Nov 2016 23:59:59:000	P1		200792	MediCare	[icon]
<input type="checkbox"/>	Ncedo Mdingi	Medical Invoice Has Been Rejected For Invoice Number: [text] With Reason: Service not covered / Not RMA Liability	04 Nov 2016 10:20:05:960	04 Nov 2016 10:20:05:960	19 Nov 2016 23:59:59:000	P1		200792	MediCare	[icon]

Buttons: Complete, Export all, Export page

The following Filtering options have been added/changed/removed:

The screenshot shows the filtering interface with the following callouts:

- 1: Points to the "Reset filters" button.
- 2: Points to the "Advanced search" button.
- 3: Points to the "Description contains:" search field.
- 4: Points to the "Module" dropdown menu.
- 5: Points to the "Priority" dropdown menu.
- 6: Points to the "Overdue" dropdown menu.
- 7: Points to the "Assigned type" dropdown menu.
- 8: Points to the "User inbox" dropdown menu.

1. New **Reset filters** button added
2. New **Advanced search** added
3. New **Description contains** search field added
4. The heading **Application** changed to **Module**
5. **Priority** dropdown list changed
6. New filter **Overdue** dropdown list added (future feature)
7. **Assigned type Role and User** checkboxes removed and replaced with **Assigned type** dropdown list
8. **User** changed to **User Inbox**

The **Retain Selected user's inbox checkbox?** has been removed

The screenshot shows a table with the following callouts:

- 9: Points to the 2nd column displaying 'U' or 'S'.
- 10: Points to the 'Alert Date' and 'Due Date' columns.
- 11: Points to the 'Application Action' column.

	Assigned to	Created By	Description	Date Sent	Alert Date	Due Date	Priority	Claim No.	Event No.	Application Action
<input type="checkbox"/>		Ncedo Mdingi	Medical Invoice Has Been Pended For Invoice Number: With Reason: No Pre Authorisation found after two years	04 Nov 2016 10:18:35:047	04 Nov 2016 10:18:35:047	19 Nov 2016 23:59:59:000	P1		200792	MediCare
<input type="checkbox"/>		Ncedo Mdingi	Medical Invoice Has Been Rejected For Invoice Number: With Reason: Service not covered / Not RMA Liability	04 Nov 2016 10:20:05:960	04 Nov 2016 10:20:05:960	19 Nov 2016 23:59:59:000	P1		200792	MediCare

9. The 2<sup>nd</sup> column displaying **U** or **S** added
10. The columns **Alert Date** and **Due Date** added
11. **Redirect URL** changed to **Action** (note that the picture icon has also changed)
12. The **Status** column has been removed

Let's discuss the new filtering options:



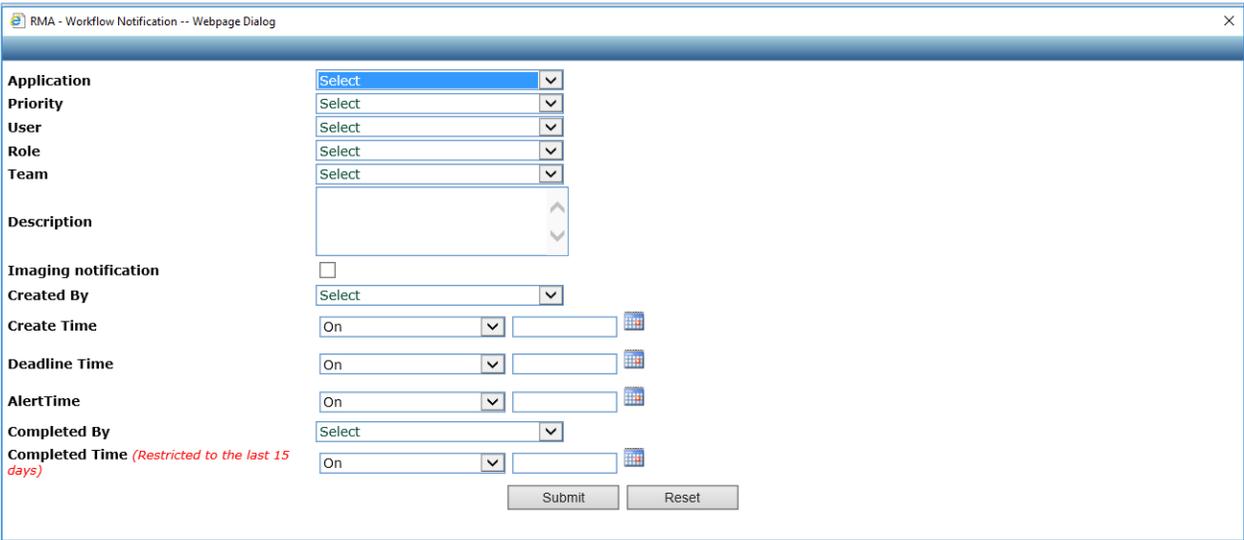
When logging on, the workflow notifications displayed will be for the logged on user.

- 1. The **Reset filters** button: **Filter options:**

To revert back to the default filtering options if filtering changes were made, the user to click on the Reset filters button.

- 2. The **Advanced search** link: **Advanced search**

The Advanced search contains more filtering options to allow for a more refined search capability. The screen below will display once you click on the Advanced search link.



3. The **Description contains** search field: **Description contains:**

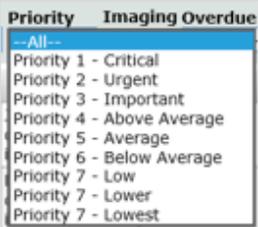
This is a quick search option and allows the user to enter any keyword contained in the description field column.



Searching by description must have a minimum of 5 characters.

4. The **Priority** dropdown list:

This will allow the user to filter the workflow notification for the selected priority.



5. New filter **Overdue** added:  
This is a future feature.



6. The **Assigned type Role and User** checkboxes removed and replaced by **Assigned type** dropdown list:



This will allow the user to filter the workflow notifications either by role, or user, or All which is then both role and user.

7. **User** changed to **User Inbox:**

This displays the workflow notifications for the displayed user.

8. The 2<sup>nd</sup> Column displaying **U** or **S** has been added:

This column was added to distinguish between workflow notifications that will either be closed by the system (S)  or by the user (U) 

9. The Columns **Alert Date** and **Due Date** have been added:  

**Alert Date:** This is a future feature which will indicate the date the system will warn the user of the due date.

**Due Date:** This is a future feature which will indicate the date by which the notification should be actioned and completed by.

10. The **Redirect URL** title have been changed to **Action** (note that the picture icon has also changed): 

If an  displays under the action column, to view the information click on the icon for details.

If the workflow notification displays this picture icon  when clicking on it, the user will be redirected to the screen to either review or action the workflow notification.

## New Buttons:

The following are new buttons which have been added.

The screenshot shows the RMAA MSP Portal interface. At the top, there is a navigation bar with icons for ClientCare, CompCare, PensCare, Medicare, Admin, FinCare, and ContactCare. The main content area displays a table of records with the following columns: Assigned to, Created By, Description, Date Sent, Alert Date, Due Date, Priority, Claim No., Event No., Application, and Action. The table contains four rows of records, each with a checkbox in the first column. Below the table are buttons for 'Complete', 'Export all', and 'Export page'. The 'Complete' button is highlighted with a blue border.

**Select All checkboxes: Tick the 1<sup>st</sup> checkbox only**

The select all checkbox can be used in conjunction with the complete button, if all displayed workflow notifications need to be selected.

The **Complete** button:

The user can tick the required checkbox in the 1<sup>st</sup> column and then click on the Complete button. This will mark the workflow notification as complete.

The **Export all** button:

This will allow the user to export all the workflow notifications records to an excel spreadsheet (the total records).

The **Export page** button:

This will allow the user to export the displayed workflow notifications to an excel spreadsheet.

**Sorting functionality:**

When clicking on the heading of any of the columns, a blue filter will appear allowing the user to sort the column in ascending or descending order.