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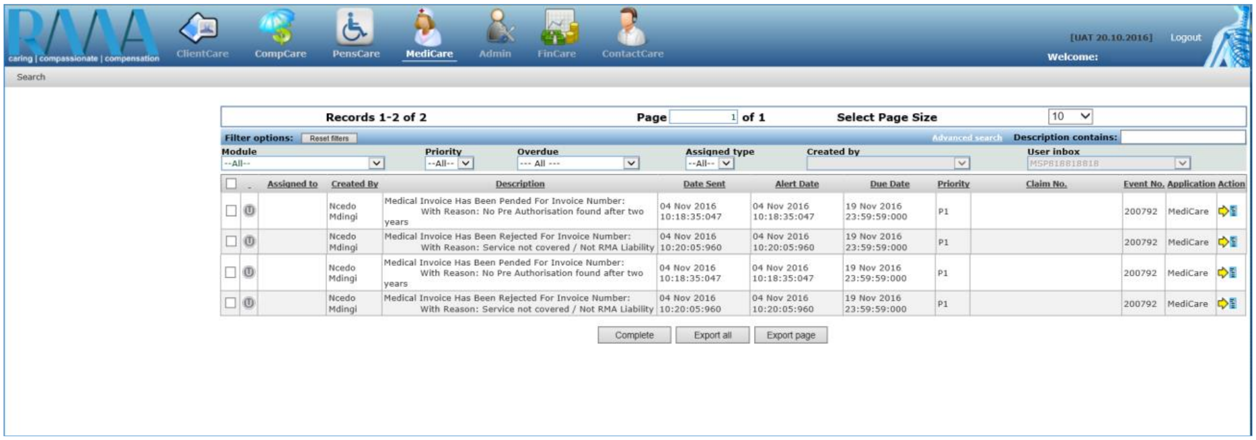
User Guide:
MSP Portal Enhancements

Introduction

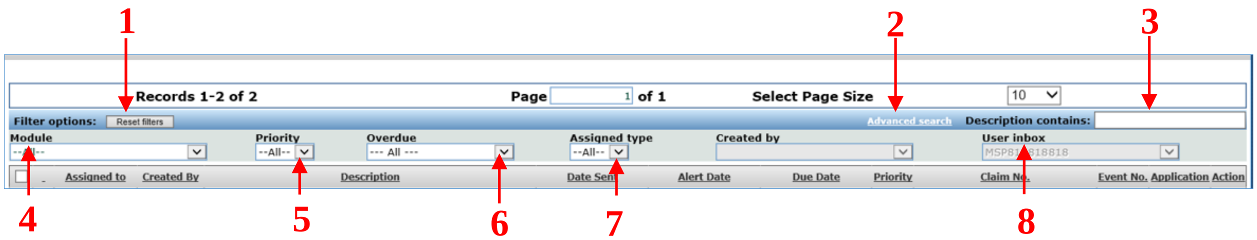
RMA's MSP Portal has been enhanced to improve the management of workflow notifications by introducing additional filtering options. This should allow users to manage their workflows more efficiently.

Filtering Enhancements

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

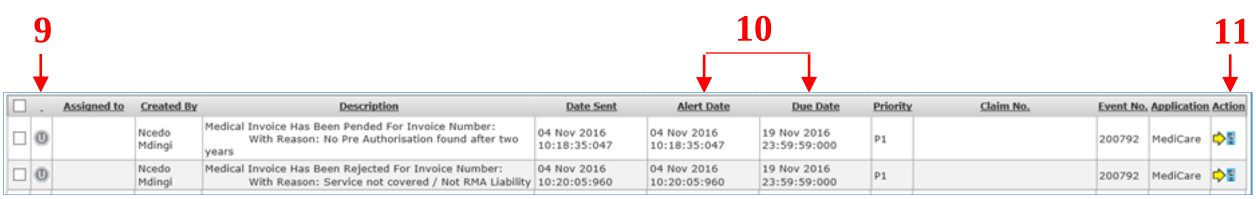


The following Filtering options have been added/changed/removed:



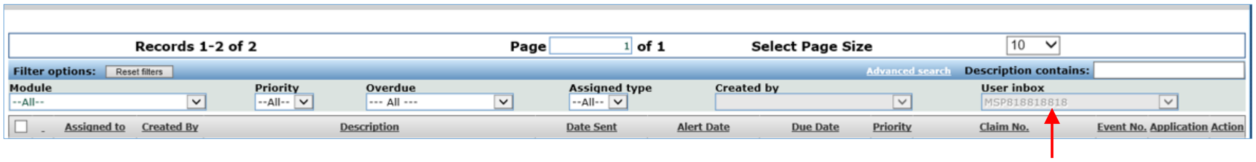
1. New **Reset filters** button added
2. New **Advanced search** added
3. New **Description contains** search field added
4. The heading **Application** changed to **Module**
5. **Priority** dropdown list changed
6. New filter **Overdue** dropdown list added (future feature)
7. **Assigned type Role and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



9. The 2nd 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:



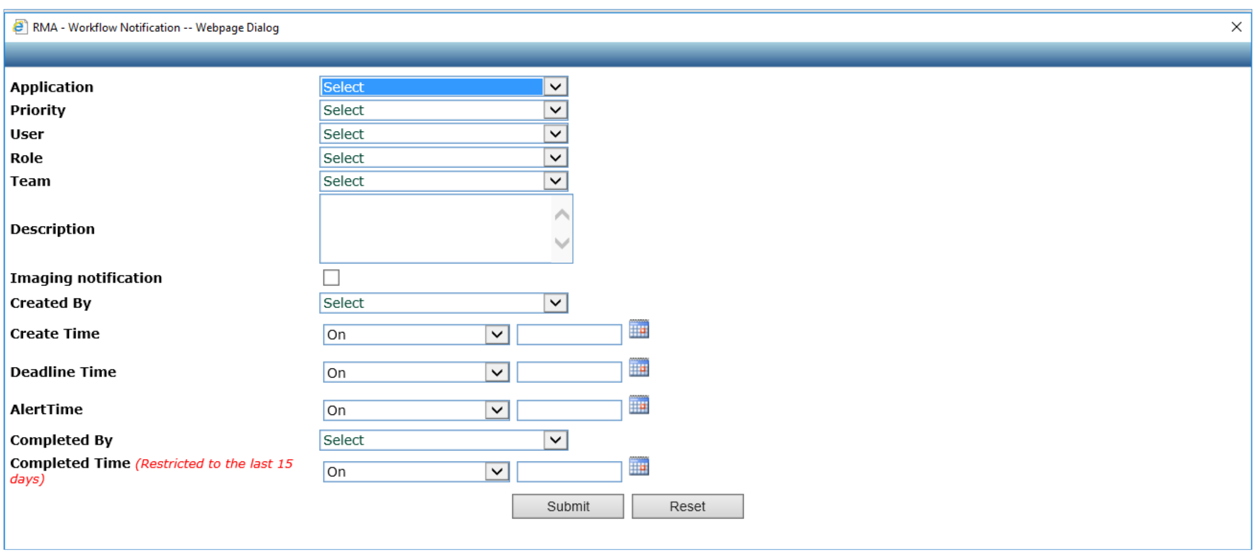
When logging on, the workflow notifications displayed will be for the logged on user.

1. The **Reset filters** button: 

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: 

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



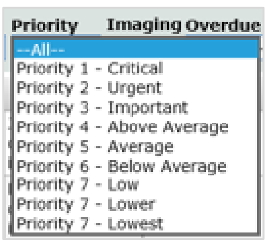
3. The **Description contains** search field: 

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

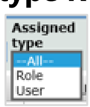
Searching by description must have a minimum of 5 characters.

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 2nd 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.

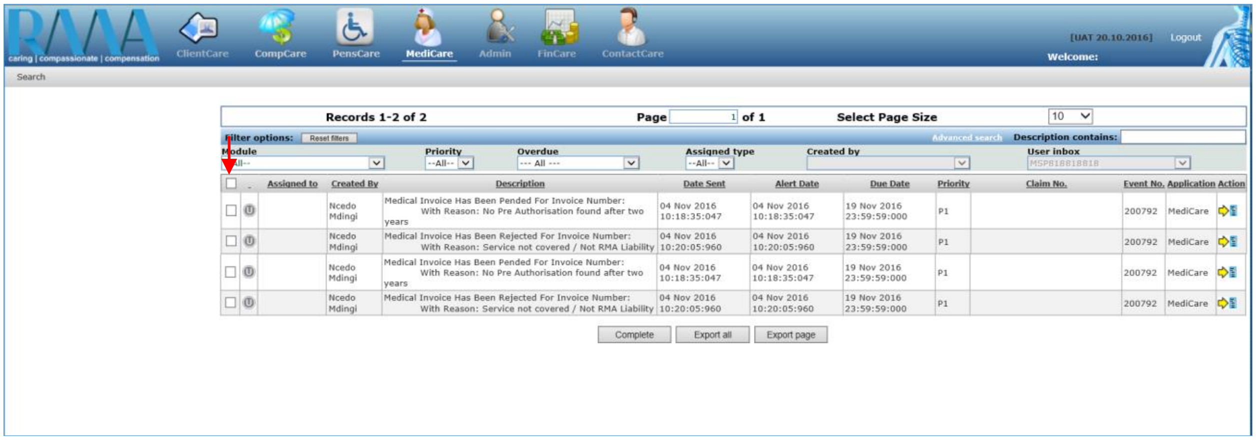
10. The **Redirect URL** title have been changed to **Action** (note that the picture icon has also changed): 

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.



Select All checkboxes: Tick the 1st 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 1st 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.