Worklist Filter Enhancement

Background

In order to help NYBEAS Users manage their worklist items more effectively, NYBEAS has recently been enhanced to allow users to sort their worklist items by a date range, or to a specific number of items within a designated date range. This function is known as "filtering" the worklist.

Instructions

A "Filter" Button has been added to each Worklist on the "Worklist Summary" Area.

Detail	Filter	Business Process	Activity	Worklist	Count
1 Detail	Filter	Online Corrections	Correction Requests	Correction Requests	27
2 Detail	Filter	NYBEAS Cancel Enrollment	Cancel Enrollment	Survivor Qualification	5
3 Detail	Filter	NYBEAS Medicare Changes	NYBEAS Medicare Differential Amount	Med Differential	9
4 Detail	Filter	BEA Administer Workflow	Message Agent Log Processin	g CVS Feedback File	42
5 Detail	Filter	BEA Administer Workflow	Message Agent Log Processin	g Coverage Change Retr	o 6
6 Detail	Filter	BEA Administer Workflow	Message Agent Log Processin	g Dependent Delete Retr	o 120
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orklist De	tails	Customize Find Viev	N All 🛗 👘 First 🗹 1 of 1 🕩 Last		
	Sent	From WL	Created on	WL Comments	

When clicked, it opens up a "Filter" Group Box giving you options of different ways to filter the data; both by date span and count for the particular worklist item you selected.

Work	klist Su	mmary		Customize Find V	/iew All 🛗 👘 First 🗹 1-6 of 27	▶ Last
[Detail	Filter	Business Process	Activity	<u>Worklist</u>	Count Count
1	Detail	Filter	Online Corrections	Correction Requests	Correction Requests	27
2	Detail	Filter	NYBEAS Cancel Enrollment	Cancel Enrollment	Survivor Qualification	5
3	Detail	Filter	NYBEAS Medicare Changes	NYBEAS Medicare Differential Amount	Med Differential	9
4	Detail	Filter	BEA Administer Workflow	Message Agent Log Processing	CVS Feedback File	42
5	Detail	Filter	BEA Administer Workflow	Message Agent Log Processing	Coverage Change Retro	6
6	Detail	Filter	BEA Administer Workflow	Message Agent Log Processing	Dependent Delete Retro	120
Filter	- Work	list - Cor	rection Requests			
Fro	m Date	01/07/2	011 🛐 To Date 07/18/2012 🛐	Count: 27 Detail		
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Worl	klist Det	tails	Customize Find View A	All 🛗 🛛 First 🗹 1 of 1 🕑 Last		
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Note: When you first select the "Filter" Group Box you will be given the full date range for a given worklist along with the total count.

By Manipulating either of the filter dates (From Date, To Date) you will see the count field automatically adjust itself to how many worklist items actually exist for this date range.

Wor	klist Sur	nmary		Customize Find V	iew All 🛗 👘 First 🗹 1-6 of 2	7 🖸 Last
	Detail	Filter	Business Process	Activity	Worklist	Count
1	Detail	Filter	Online Corrections	Correction Requests	Correction Requests	27
2	Detail	Filter	NYBEAS Cancel Enrollment	Cancel Enrollment	Survivor Qualification	5
3	Detail	Filter	NYBEAS Medicare Changes	NYBEAS Medicare Differential Amount	Med Differential	9
4	Detail	Filter	BEA Administer Workflow	Message Agent Log Processing	CVS Feedback File	42
5	Detail	Filter	BEA Administer Workflow	Message Agent Log Processing	Coverage Change Retro	6
6	Detail	Filter	BEA Administer Workflow	Message Agent Log Processing	Dependent Delete Retro	120
Filte	r - Work	list - Cor	rection Requests			
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Worklist Su	mmary		<u>Customize Find Vi</u>	ew All 🛗 🛛 First 🕙 1-6 of 2	7 🕨 Last
Detail	Filter	Business Process	Activity	<u>Worklist</u>	Count
1 Detail	Filter	Online Corrections	Correction Requests	Correction Requests	27
2 Detail	Filter	NYBEAS Cancel Enrollment	Cancel Enrollment	Survivor Qualification	5
3 Detail	Filter	NYBEAS Medicare Changes	NYBEAS Medicare Differential Amount	Med Differential	9
4 Detail	Filter	BEA Administer Workflow	Message Agent Log Processing	CVS Feedback File	42
5 Detail	Filter	BEA Administer Workflow	Message Agent Log Processing	Coverage Change Retro	6
6 Detail	Filter	BEA Administer Workflow	Message Agent Log Processing	Dependent Delete Retro	120
Filter - Work	list - Cor	rection Requests			
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When you are content with the count, you can then hit the "Detail" Button within the Filter Group Box. You will now get a "Worklist Details" Area with as many rows as what your count says.

Wo	klist Su	mmary				Custo	mize Find Viev	v All I 🛗	First 1-6 of 2	7 🖸 Last
	Detail	Filter	Business P	rocess		Activity		Worklist		Count
	Detail	Filter	Online Corr	ections		Correction Reques	sts	Correction	n Requests	27
2	Detail	Filter	NYBEAS Ca	incel Enrol	Iment	Cancel Enrollment		Survivor Q	ualification	3
3	Detail	Filter	NYBEAS Me	dicare Cha	anges	NYBEAS Medicare Amount	Differential	Med Differ	rential	9
4	Detail	Filter	BEA Admini	ster Workfi	ow	Message Agent Lo	g Processing	CVS Feed	lback File	42
5	Detail	Filter	BEA Admini	ster Workfi	ow	Message Agent Lo	g Processing	Coverage	Change Retro	6
6	Detail	Filter	BEA Admini	ster Workfl	ow	Message Agent Lo	g Processing	Depender	nt Delete Retro	120
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You can also just simply change the "Count" in the Filter Group Box, with or without changing the From and To Dates, to get the desired number of rows back in the "Worklist Details" Area.

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Detail	Filter Business P	rocess	<u>Activity</u>	Wo	rklist	Count			
1 Detail	Filter Online Corr	ections	Correction Requests	Cor	rection Requests	27			
2 Detail	Filter NYBEAS Ca	ncel Enrollment	Cancel Enrollment	Sun	vivor Qualification	3			
3 Detail	Filter NYBEAS Me	dicare Changes	NYBEAS Medicare Differe Amount	ntial Mec	Differential	9			
4 Detail	Filter BEA Admini	ster Workflow	Message Agent Log Proc	essing CVS	Feedback File	42			
5 Detail	Filter BEA Admini	ster Workflow	Message Agent Log Proc	essing Cov	erage Change Retro	6			
6 Detail	Filter BEA Admini	ster Workflow	Message Agent Log Proc	essing Dep	endent Delete Retro	120			
ilter - Workl	list - Correction Requ	ests							
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