

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.

Worklist Summary						Customize Find View All First 1-6 of 27 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

Field 1: [] Field 2: [] Field 3: [] Sort Save Comments

Worklist Details			Customize Find View All First 1 of 1 Last
	Sent From	WL Created on	WL Comments
1			

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.

Worklist Summary						Customize Find View All First 1-6 of 27 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

Filter - Worklist - Correction Requests

From Date: 01/07/2011 To Date: 07/18/2012 Count: 27 Detail

Field 1: [] Field 2: [] Field 3: [] Sort Save Comments

Worklist Details			Customize Find View All First 1 of 1 Last
	Sent From	WL Created on	WL Comments
1			

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.

Worklist Summary Customize | Find | View All First 1-6 of 27 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

Filter - Worklist - Correction Requests

From Date: 11/11/2011 To Date: 07/18/2012 Count: 2 [Detail](#)

Field 1: Field 2: Field 3: [Sort](#) [Save Comments](#)

Worklist Details Customize | Find | View All First 1 of 1 Last

	Sent From	WL Created on	WL Comments
1			

Worklist Summary Customize | Find | View All First 1-6 of 27 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

Filter - Worklist - Correction Requests

From Date: 01/07/2011 To Date: 07/01/2012 Count: 25 [Detail](#)

Field 1: Field 2: Field 3: [Sort](#) [Save Comments](#)

Worklist Details Customize | Find | View All First 1 of 1 Last

	Sent From	WL Created on	WL Comments
1			

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.

Worklist Summary Customize | Find | View All | First 1-6 of 27 Last

Detail	Filter	Business Process	Activity	Worklist	Count
1	Detail	Filter	Online Corrections	Correction Requests	27
2	Detail	Filter	NYBEAS Cancel Enrollment	Cancel Enrollment	3
3	Detail	Filter	NYBEAS Medicare Changes	NYBEAS Medicare Differential Amount	9
4	Detail	Filter	BEA Administer Workflow	Message Agent Log Processing	42
5	Detail	Filter	BEA Administer Workflow	Message Agent Log Processing	6
6	Detail	Filter	BEA Administer Workflow	Message Agent Log Processing	120

Filter - Worklist - Correction Requests

From Date: 11/11/2011 To Date: 07/18/2012 Count: 2 [Detail](#)

Field 1: Field 2: Field 3: [Sort](#) [Save Comments](#)

Worklist Details Customize | Find | View All | First 1-2 of 2 Last

Mark Worked	ID	Empl Rcd#	DeptID	Name	Ref. Nbr.	Sent From	WL Created on	WL Comments	Reassign
1 <input checked="" type="checkbox"/>	Work It	0			105146		07/18/2012 2:03:44PM		Reassign
2 <input checked="" type="checkbox"/>	Work It	0			149154		07/18/2012 2:31:46PM		Reassign

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.

Worklist Summary Customize | Find | View All | First 1-6 of 27 Last

Detail	Filter	Business Process	Activity	Worklist	Count
1	Detail	Filter	Online Corrections	Correction Requests	27
2	Detail	Filter	NYBEAS Cancel Enrollment	Cancel Enrollment	3
3	Detail	Filter	NYBEAS Medicare Changes	NYBEAS Medicare Differential Amount	9
4	Detail	Filter	BEA Administer Workflow	Message Agent Log Processing	42
5	Detail	Filter	BEA Administer Workflow	Message Agent Log Processing	6
6	Detail	Filter	BEA Administer Workflow	Message Agent Log Processing	120

Filter - Worklist - Correction Requests

From Date: 01/07/2011 To Date: 07/18/2012 Count: 10 [Detail](#)

Field 1: Field 2: Field 3: [Sort](#) [Save Comments](#)

Worklist Details Customize | Find | View All | First 1-10 of 10 Last

Mark Worked	ID	Empl Rcd#	DeptID	Name	Ref. Nbr.	Sent From	WL Created on	WL Comments	Reassign
1 <input checked="" type="checkbox"/>	Work It	0	55875	...	127454		01/07/2011 10:27:40AM		Reassign
2 <input checked="" type="checkbox"/>	Work It	0	55875	...	129127		02/10/2011 12:15:47PM		Reassign
3 <input checked="" type="checkbox"/>	Work It	0	55875	...	129489		02/22/2011 4:24:47PM		Reassign
4 <input checked="" type="checkbox"/>	Work It	0	55875	...	130194		03/14/2011 2:10:58PM		Reassign
5 <input checked="" type="checkbox"/>	Work It	0	55875	...	130230		03/15/2011 10:38:02AM		Reassign
6 <input checked="" type="checkbox"/>	Work It	0	55875	...	130234		03/15/2011 11:30:39AM		Reassign
7 <input checked="" type="checkbox"/>	Work It	0	10660	...	130674		03/29/2011 9:45:10AM		Reassign
8 <input checked="" type="checkbox"/>	Work It	0	12180	...	130868		04/04/2011 10:02:55AM		Reassign
9 <input checked="" type="checkbox"/>	Work It	0	04000	...	130936		04/05/2011 10:25:50AM		Reassign
10 <input checked="" type="checkbox"/>	Work It	0	50550	...	131085		04/07/2011 1:35:30PM		Reassign