Riskmaster Accelerator

Data Exchange Products User Guide

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Overview

RISKMASTER Data Analytics completely automates Self-Insurance import/export extract processing. RISKMASTER Data Analytics brings together several standalone extract modules in RISKMASTER and combines them together under one umbrella. You can use the RISKMASTER Task Manager to schedule any of the extracts included in the Data Analytics system.

Data Analytics allows organizations to easily explore, extract, transform and deliver data anywhere and at any frequency. As a result, you can ensure the integrity of data, maximize productivity and accelerate performance of your day to day operations.

RISKMASTER Data Analytics replaces legacy VB import/export extracts with Rich BI enabled Data Integrator extracts.

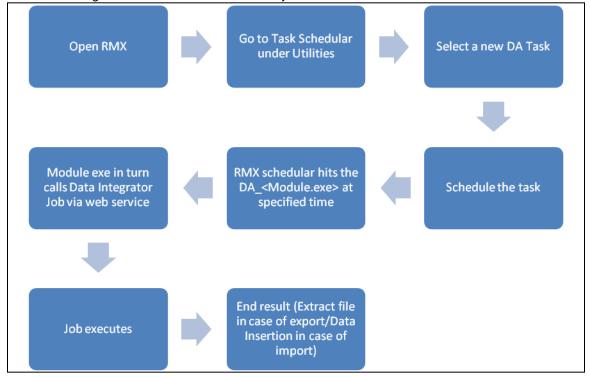
Requirements

For setting up and using RISKMASTER Data Analytics you need the following components:

- 1. RISKMASTER Data Analytics Configuration
- 2. SAP Business Objects Data Services
- 3. RISKMASTER Accelerator

Working with the Task Manager

To Set up a Data Analytics Job



This flowchart gives an overview of "how a DA job is scheduled and executed in RISKMASTER".

To Schedule a Data Analytics Job

- 1. From the main menu, select Utilities. The Utilities menu opens.
- 2. From the Utilities menu, choose Tools and Designers. The Tools and Designers menu opens.

Managers	-> I			
Technicians	->			
Tools and Designers	→ [Query Designer		1
UI Admins	•	Diary Utilities		
		Auto Diary Setup		
		Adjuster Transfer		
		Transaction Type Change		
		MCM PreFill Folder Utility		
		Jurisdictional Options)	
		Script Editor		
TM Jobs View		Task Manager	•	
TM Jobs View View Scheduled Tasks		Task Manager		•

- 3. From the Tools and Designers menu, choose Task Manager. The Task Manager Menu opens.
- 4. From the Task Manager menu, choose View Scheduled Tasks. The View Scheduled Tasks window opens.

RISKMASTER	CSC	WiKonnect		\leq >
Diaries Diary List Funds Payment Notification	Document Diaries Funds Maintenance Utilities => View Scheduled Tasks Task List	: My Work Reports Search Security User Doc	uments Utilities Help	×
Utilities View Scheduled Tasks	Task Name IS0444 IS0234 IS0sad	Schedule Type Periodically OneTime OneTime	Hext Run Date/Time 4/13/2009 2:40 PM 4/21/2009 11:00 PM 4/13/2009 11:00 PM	

This window shows all previously scheduled tasks and lets you schedule new tasks.

- 5. On the View Scheduled Tasks window, select the Schedule a New Task button. The New Task window opens.
- 6. From the Task Type drop down list, select the appropriate task type.

Document	Diaries	Funds	Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => \	/iew Sch	eduled	Tasks							
Task Type	e:				•	/				
Task Nam	ie:		rocess WPA							
Schedule	Туре:	E	inancial Hist illing Schedu ES Schedul ositivePay	ıler	essing					
			IBR IMSEA							
			099-MISC							
			30							
			IDS IS							

7. In the Task Name field enter the task name.

Document Diaries Fu	unds Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help			
tilities => View Scheduled Tasks											
Task Type:	MBR			*							
Task Name:	MBR Test										
Schedule Type:		*									
	OneTime Periodically Weekly Monthly Yearly	,									

- 8. From the Schedule Type drop down list, select the appropriate Schedule Type.
- 9. In the Date field, enter the date on which you want to schedule a task or select the calendar button to select the date from calendar.

RISKMASTER								
Disting	Cocument Diaries Funds Main		ports Search	n Security	y User Doo	cuments	Utilities	Help
Diaries Diary List	Utilities => View Scheduled Tasks	6						
	Schedule a Task							
View Scheduled Tasks								
	Task Type:	MBR						
	Task Name:	MBR Te	est					
	SubTask Name:	None						
	Schedule Type:	OneTim	1e					
				_				
	Enter the Date and Time	e you would like t	to Run the	lask o	n:			
	Date:	Π			4			
		Ľ						
	Time:	0	Novembe	r 2010	5 ~	•		
		Su	Mo Tu	We 1	ſh Fr	Sa		
		30	31 1	2	3 4	5		
		6	7 8	9	10 11	12		
		13	14 15	16	17 18	19		
		20	21 22	23	24 25	26		
		27	28 29	30	1 2	3		

- 10. In the Time field, enter the time at which you want to schedule the task.
- 11. To perform module specific settings, select the Optionset button.

The <Module> settings window opens. (In this example, we have selected the MBR module so an MBR optionset window opens).

Document Diaries Funds Maintenance My Work Reports Search	Security User Documents Utilities Help
Utilities => View Scheduled Tasks	
Import Setting Export Setting	
OptionSet Name MBR Test	
File Setting O Access Pipe	
C:\Document and setting Browse	
Data Import Setting Allow Payments on Closed Claims Check Enclosure Flag for MBR Fee Payments No Payments on Frozen Claims Import Reason (EOB Code)	□ Notify\ Reject if Insufficient Reserves ☑ Use Suffix code to identify Entities □ Import Printed Checks □ Import Provider's Invoice Number
Import Medical Data	Queued Payment
Payee Search Criteria Use First Entity Listed in RM Search by SSN only Use Zip Code For Payee Lookup Do not add new Payees Use Import Payee Info For Payment	Payment Duplicate Search Exclude Invoice Number Include Voids in Search Use Service Dates not Trans Date
Ultra Fee Daumant	
Use Fee Payment	ical Porcenia
MB Jurisdiction Othe	r Reserve
MD ME	
MI >	
MN S	
Jurisdictions MS	
	the street price later
Fee Payments <u>Transaction Type</u> Payment Date Medical Reserve —Select V —Select	Identifier Printed Status
Other ReserveSelect VSelect	~
Save Canoel	

- 12. Complete the fields on the <module> settings window and save the job.
- 13. You have successfully scheduled a job using the Task Manager. The Task Manager will run your DA job (DA_Module.exe) at the specified time and according to schedule. The DA_Module.exe in turn will call the Data Integrator Job via a web service.

To Modify/Delete a Scheduled Task

- 1. From the main menu, select Utilities. The Utilities menu opens.
- 2. From the Utilities menu, choose Tools and Designers. The Tools and Designers menu opens.
- 3. From the Tools and Designers menu, choose Task Manager. The Task Manager Menu opens.
- 4. From the Task Manager menu, choose View Scheduled Tasks.

The View Scheduled Tasks window opens.

Docume	nt Diaries	Funds	Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help	
tilities =	> View Sch	eduled T	asks								
Task I	list										
	Task Nar	ne			Sch	edule 1	Гуре		N	lext Run Date/Time	×
0	MBR				One	Time			6	/23/2010 1:11 AM	
0	PositivePa	ψ			One	Time			6	/23/2010 11:11 AM	
F	lefresh	Scl	hedule A New	/ Task							

Modify Task

- 1. From the Task List section, select the name of the task that you want to modify. The Schedule a Task window opens.
- 2. Modify the task details and then select the 'Optionset' button.
- 3. Select the Save button.

The task saves with new data.

Delete Task

1. From the Task List section, select the option button next to the task that you want to delete and then select the Delete button.

A confirmation window opens and displays the message.

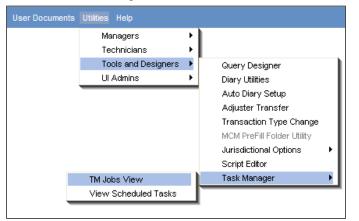
2. Select the 'OK' button from the window.

The task no longer lists in the Task List section.

To Track Scheduled Jobs in Task Manager

All DA jobs can be tracked in Task Manager Jobs View. You can review all currently running jobs and archived jobs in the Jobs View.

- 1. From the main menu, select Utilities. The Utilities menu opens.
- 2. From the Utilities menu, choose Tools and Designers. The Tools and Designers menu opens.
- 3. From the Tools and Designers menu, choose Task Manager. The Task Manager Menu opens.
- 4. From the Task Manager menu, choose TM Jobs View.



The TM Jobs View window opens.

RISKMASTER	CSC		WiKonnect					
Diaries	Document Diaries	Funds Maintenar	ice My Work Reports S	earch Security Use	er Documents Utilities	Help		
Diary List	Utilities => TM Jobs	View						
Funds								
Payment Notification	Running Jobs							
Utilities								
View Scheduled Tasks	Job Na	me	Description	Job State	Start Da	ite/Time	End Date/Time	^
TM Jobs View	MBR Vir	/	MBR	Running	4/8/2009	7:50 PM	1/1/0001 12:00 AM	
	MBR im	port test	MBR	Running	4/8/2009	7:50 PM	1/1/0001 12:00 AM	
	 ISOTes 	t1	ISO DI	Running	4/8/2009	7:16 PM	1/1/0001 12:00 AM	
	ISO		ISO DI	Running	4/8/2009	7:09 PM	1/1/0001 12:00 AM	
	MBR ex	port test	MBR	Running	4/8/2009	6:50 PM	1/1/0001 12:00 AM	
	O ISO112	233	ISO DI	Running	4/8/200	M Jobs View	1/1/0001 12:00 AM	
	O ISO111	1	ISO DI	Running	4/8/2009	6:27 PM	1/1/0001 12:00 AM	~
	<							>
	Abort	Refresh						
	Archived Jobs							
	Job Name	Description	Job State	Start Date/Time	End Date/Time	Job Files		^
	ISO444	ISO DI	Aborted	4/13/2009 2:40 PM	4/13/2009 2:40 PM		<u>0</u>	
	ISO444	ISO DI	<u>Aborted</u>	4/13/2009 2:10 PM	4/13/2009 2:10 PM		D	
	ISO444	ISO DI	Failure to Launch	4/13/2009 1:40 PM	4/13/2009 1:40 PM		D	
	ISO444	ISO DI	Failure to Launch	4/13/2009 1:10 PM	4/13/2009 1:10 PM		D	~
	<							>

• The Running Jobs section shows all the jobs running at that particular time. The Job State is 'Running' for these jobs.

- The Archived Jobs section shows all the jobs executed in the past along with the job files as attachments. The Job State for the job can be any one of the following:
 - Aborted: When the job state displays as 'Aborted', this means that job was stopped when it was running.
 - Pending with User Verification: When the job state displays as 'Pending with User Verification', this means that job is not completed and data has some errors which can be corrected by opening user verification page. This is only in case of DDS and DIS.
 - Completed: When the job state displays as 'Completed', this means that the job completed successfully without any errors.
 - Completed with Error: When the job state displays 'Completed with Error', this means that errors occurred during the job.
 - Completed with Validation Error: When the job state displays 'Completed with Validation Error', this means that data validation errors occurred during the job.
 - Failure to Launch: When the Job state displays 'Failure to Launch', this means that the job was unable to run the Executable file at the backend.
 - Scheduled to Abort: When the Job state displays 'Scheduled to Abort', this means that the job is scheduled to be stopped at the specified time
 - Scheduled to Run: When the Job state displays 'Scheduled to Run', this means that the job is scheduled to run later at the specified time.

To View Jobs in Task Manager

Use the TM Jobs View window to view jobs that are completed or are running.

- 1. From the main menu, select Utilities. The Utilities menu opens.
- From the Utilities menu, choose Tools & Designers. The Tools & Designers menu opens.
- 3. From the Tools & Designers menu, choose Task Manager. The Task Manager menu opens.
- 4. From the Task Manager menu, choose TM Jobs View. The TM Jobs View window opens.

To View Scheduled Tasks

Use the View Scheduled Tasks window to view jobs that are scheduled to run.

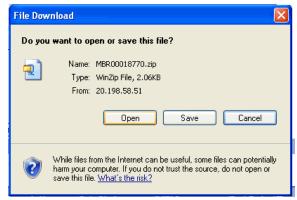
- 1. From the main menu, select Utilities. The Utilities menu opens.
- 2. From the Utilities menu, choose Tools & Designers. The Tools & Designers menu opens.
- 3. From the Tools & Designers menu, choose Task Manager. The Task Manager menu opens.
- 4. From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.

button next to the job

To View Job Files

1. In the Archived Jobs section, from the Job Files column, select the for which you want to view the job output.

The File Download window opens.



 Select the 'Open' button to unzip the file or select the Save button to save file for future references.

If you selected Open, the unzip window opens.

E MMSEA00000152[1].zip - WinRAR					l ×
<u>File Commands Tools Favo</u> rites Optio <u>n</u> s	<u>H</u> elp				
Add Extract To Test View	Delete Find	Wizard	Info	n Comment SFX	F
MMSEA00000152[1].zip - ZIP arch	ive, unpacked size 7(),888 bytes			⊡
Name 🟠	Size	Packed	Туре	Modified	
D			Folder		
📋 000012345Query Input20100329140029	321	135	Text Document	3/29/2010 2:02	1
🗐 ErrorLog.txt	52,578	951	Text Document	3/29/2010 2:03	c
MMSEA_152_Process.log	7,363	1,163	Text Document	3/29/2010 2:04	E
MMSEA_152_Process_Error.log	0 8		Text Document	3/29/2010 2:04	c
MMSEA_152_Process_Trace.log	10,626	1,461	Text Document	3/29/2010 2:03	1

- 3. Select the file that you want to unzip. The unzip folder will contain the following files:
 - The ErrorLog.csv file This file contains data validation errors from a DDS or DIS job.

This is an example of a DIS errorlog.csv file.

	}}				6	errorlog000	01.csv - Microsoft	Excel					
	Home Insert	Page Layout	Formulas	Data Review	View								
Pa	Cut Lim Copy ste ✓ Format Painter Clipboard □		• 11 • A ∧ 		Vrap Text		General		-	Format as Table * St Styles	Cell Inse		Format
	L1 -	(f _x											
	A		В				С	D	E	F	G	н	1
1	Data Error Log for 1st	execution of Jo	ob #141 J_DIS.										
2	Job started at 2010.0	5.28 18:42:22 us	ing optionset I	D 63.									
3	Validatior Invalid Sho	ort Code in COV	/ERGE_TYPE_CC	DE\nRequired fiel	ds are empty	POLICY	X_CVG_TYPE	57	COVERAG	SE_TYPE_C	DDE;COVE	RAGE_TYPI	E_CODE
4	Validatior Invalid Sho	ort Code in COV	/ERGE_TYPE_CC	DE\nRequired fiel	ds are empty	POLICY	X_CVG_TYPE	58	COVERAG	E_TYPE_C	DDE;COVE	RAGE_TYPI	E_CODE
5	Validatior Invalid Sho	ort Code in COV	/ERGE_TYPE_CC	DE\nRequired fiel	ds are empty	POLICY	X_CVG_TYPE	59	COVERAG	E_TYPE_C	DDE;COVE	RAGE_TYPI	E_CODE
6	Validatior Invalid Sho	ort Code in COV	/ERGE_TYPE_CC	DE\nRequired fiel	ds are empty	POLICY	X_CVG_TYPE	60	COVERAG	SE_TYPE_C	DDE;COVE	RAGE_TYPI	E_CODE
7	Validatior Invalid Sho	ort Code in COV	/ERGE_TYPE_CC	DE\nRequired fiel	ds are empty	POLICY	X_CVG_TYPE	61	COVERAG	E_TYPE_C	DDE;COVE	RAGE_TYPI	E_CODE
	Validatior Invalid Sho					POLICY	X_CVG_TYPE	62	COVERAG	SE_TYPE_C	DDE;COVE	RAGE_TYPI	E_CODE
	Validatior Invalid Sho					POLICY	X_CVG_TYPE	63	COVERAG	SE_TYPE_C	DDE;COVE	RAGE_TYPI	E_CODE
	Validatior Invalid Sho					POLICY_	X_CVG_TYPE	64	COVERAG	SE_TYPE_C	DDE;COVE	RAGE_TYPI	E_CODE
	Validatior Invalid Sho					POLICY	X_CVG_TYPE				DDE;COVE		-
	Validatior Invalid Sho					POLICY_	X_CVG_TYPE				DDE;COVE		
	Validatior Invalid Sho					_	X_CVG_TYPE				DDE;COVE		-
	Validatior Invalid Sho					-	X_CVG_TYPE				DDE;COVER	-	-
	Validatior Invalid Sho					-	X_CVG_TYPE				DDE;COVE		
16	Validatior Invalid Sho	ort Code in COV	/ERGE_TYPE_CC	DE\nRequired fiel	ds are empty	POLICY	X_CVG_TYPE	70	COVERAG	SE_TYPE_C	DDE;COVER	RAGE_TYPI	E_CODE

 ErrroLog.txt- This file contains data validation errors from a 1099, ISO, MBR, MMSEA, Positive Pay or ACH job.

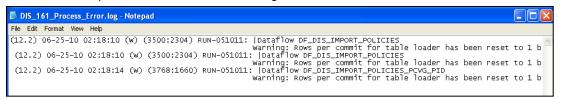
This is an example of a MMSEA ErrorLog.txt file.

🔊 ErrorLog. txt - Notepad	
File Edit Format View Help	
2010.06.24 14:14:50 2010.06.24 14:14:50 2010.06.24 14:14:50 2010.06.24 14:14:50 2010.06.24 14:14:50 2010.06.24 14:14:50 2010.06.24 14:14:50 2010.06.24 14:14:50 2010.06.24 14:14:50	Missing Data for Claimant with a Last Nam Missing Data for Claimant with a Last Nam
<	ک

 Process.log file- This file includes job processing details about how long each stage (workflow) of the job takes to run. This is an example of a DIS Process.log file.

DIS_32_Process.log - Notepad	
File Edit Format View Help	
<pre>THE EDIC FORMA VHEW Hep HDF_DIS_TRANSFORM_WHL/O_GET_WHL_MADPINGL, STOP, 1, 0.000, 35.265 /DF_DIS_TRANSFORM_WHL/O_GET_WHL_MADPINGL, STOP, 1, 0.000, 35.265 /DF_DIS_TRANSFORM_WHL/O_GET_WHL_FUNCTIONAL, STOP, 1, 0.000, 35.265 /DF_DIS_TRANSFORM_WHL/O_GET_WHL_FUNCTIONAL, STOP, 1, 0.000, 35.265 /DF_DIS_TRANSFORM_WHL/O_GEX_WHL_STOP, 1, 0.000, 35.265 /DF_DIS_TRANSFORM_WHL/O_EXTRACLOPTIONSET, STOP, 1, 0.000, 35.265 /DF_DIS_TRANSFORM_WHL/O_EXTRACLOPTIONSET, STOP, 1, 0.000, 36.312 /DF_DIS_TRANSFORM_WHL/O_EXTRACLOPTIONSET, STOP, 1, 0.000, 38.312 /DF_DIS_GET_DISTINT_CODE_EMPLOYEES/O_EMPLOYES_USENDED_SIGNED_</pre>	
/DF_UPDATE_CODE_ID/Query, STOP, 9, 0.000, 40.500	~

 Process_Error.log file- This file includes job processing errors while running the particular job. This is an example of a DIS Process_Error.log file.



 Process_Trace.log file- This file includes job processing details about when each stage (workflow) in the job begins and ends. This is an example of a DIS Process_Trace.log file.

DIS_32_Process_Trace.log - Notepad	
File Edit Format View Help	
(12.2) 06-08-10 18:17:17 (2340:1972)	JOB: Reading job <3b3476e9_0f47_4cb0_9f73_cb59d68560dc> from the repository; Server
(12.2) 06-08-10 18:17:17 (2340:1972)	JOB: Current directory of job <3b3476e9_0f47_4cb0_9f73_cb59d68560dc> is <c:\progra< th=""></c:\progra<>
(12.2) 06-08-10 18:17:17 (2340:1972) (12.2) 06-08-10 18:17:18 (2340:1972) (12.2) 06-08-10 18:17:18 (2340:1972) (12.2) 06-08-10 18:17:48 (2340:1972) (12.2) 06-08-10 18:17:48 (2340:1972)	JOB: Job <j_diš> of runid <2010060818171723401972> is initiated by user <system>.</system></j_diš>
(12.2) 06-08-10 18:17:48 (2340:1972) (12.2) 06-08-10 18:17:48 (2340:1972)	JOB: Job <j_di5> is started. WORKFLOW: Work flow <wf_di5_read_optionset> is started. WORKFLOW: Work flow <</wf_di5_read_optionset></j_di5>
(12.2) 06-08-10 18:17:50 (0768:2780)	WORKFLOW: WORK THUW <we_dis_load_of[ionsets is="" started.<br="">DATAFLOW: Process to execute data flow <pc_dis_transform_xml> is started. DATAFLOW: The specified locale <eng_us.cpl232> has been coerced to <unicode (utf-16)=""> f datastore <uis> obtains data in <utf-8< codepage.<="" td=""></utf-8<></uis></unicode></eng_us.cpl232></pc_dis_transform_xml></we_dis_load_of[ionsets>
(12.2) 06-08-10 18:17:51 (0768:2780)	
(12.2) 06-08-10 18:17:51 (0768:2780)	
	DATAFLOW: Data flow <of_dis_transform_xml> is started. DATAFLOW: Cache statistics determined that data flow <of_dis_transform_xml> uses <0> ce than(or equal to) the virtual memory <1598029824> bytes available for caches. MEMORY.</of_dis_transform_xml></of_dis_transform_xml>
(12.2) 06-08-10 18:17:52 (0768:2780) (12.2) 06-08-10 18:17:52 (0768:2780) (12.2) 06-08-10 18:17:52 (2340:1972) (12.2) 06-08-10 18:17:52 (2340:1972) (12.2) 06-08-10 18:17:52 (2340:1972) (12.2) 06-08-10 18:17:52 (2340:1972)	DATAFLOW: Data flow <of_dis_transform_xml> using IN MEMORY Cache. DATAFLOW: Data flow <of_dis_transform_xml> is completed successfully. DATAFLOW: Process to execute data flow <of_dis_transform_xml> is completed. WORKFLOW: Work flow <wf_dis_load_optionset> is completed successfully. WORKFLOW: Work flow <wf_dis_read_dataf> is started. WORKFLOW: Work flow <wf_dis_read_dataf> is started.</wf_dis_read_dataf></wf_dis_read_dataf></wf_dis_load_optionset></of_dis_transform_xml></of_dis_transform_xml></of_dis_transform_xml>
(12.2) 06-08-10 18:17:54 (2544:2164) (12.2) 06-08-10 18:17:54 (2544:2164)	DATAFLOW: Process to execute data flow <pre>cobe_DIS_GET_DISTINCT_COBE_EMPLOYEES> is started. DATAFLOW: Data flow <pre>cobe_DIS_GET_DISTINCT_CODE_EMPLOYEES> is started. DATAFLOW: Cache statistics for data flow <pre>cobe_DIS_GET_DISTINCT_CODE_EMPLOYEES> are not a</pre></pre></pre>
(12.2) 06-08-10 18:17:55 (2544:2164)	DATAFLOW: Data flow <df_dis_get_dising_code_employees> is completed successfully. DATAFLOW: Process to execute data flow <df_dis_get_distinct_code_employees> is complete</df_dis_get_distinct_code_employees></df_dis_get_dising_code_employees>

 Query_Input.txt file- This file includes the extract file created for specific Data Analytics jobs, such as MMSEA, 1099-MISC etc.

This is an example of a Query Input.txt file. It contains a header record, detail record for each claimant (containing last name, first name, date of birth, sex and social security number) and a trailer record which includes a count of the detail records. You can now translate this file using the HEW software before it can be submitted to Medicare.

Eile Edit Format View Help H0000012345NGHQ20100329 Smith J19721107211111111 Trent M200111050444444444 Lewis M1942020515555555 Rodrigs19560515133333333 Raymons19780909022222222 T0000012345NGHQ20100329000000005	📕 000012345Query Input20100329140029.txt - Notepad						
Smith J19721107211111111 Trent M20011105044444444 Lewis M19420205155555555 Rodrigs19560515133333333 Raymons197809090222222222	<u>File E</u> dit F <u>o</u> rmat <u>V</u> iew <u>H</u> elp						
	Smith J19721107211111111 Trent M20011105044444444 Lewis M19420205155555555 Rodrigs195605151333333333 Raymons197809090222222222						

 ProcessLog.txt file- This Data Analytics MBR file includes details about successful validations and lists records imported into RISKMASTER. This file is specific to Data Analytics MBR jobs.

This is an example of a ProcessLog.txt file. It contains sections for Validation, Add Payees, Transferred Records, Imported Payments, and Balanced Financials.

The Validation section lists all validations processed. The number of failed records will display after the Error(s) Found for that particular validation. In this Example, there are 22 records which failed the Closed Claim validation. Details related to the failed validation errors are found in the ErrorLog.txt file.

The Add Payee section lists all Payees added to RISKMASTER through this particular DA MBR job. Payee details include Last Name, First Name, and Tax Id.

The Transferred Records section displays the total number of records imported into RISKMASTER from the Header and Line Item records in the import file. In this Example, 3 Header records were imported into the FUNDS table and 11 Line Item records were imported into the FUNDS_TRANS_SPLIT table in RISKMASTER.

The Imported Payments section lists the payment records imported into the FUNDS and FUNDS_TRANS_SPLIT tables in RISKMASTER. Payment details include Claim Number, Bill Document Number, Payee, Amount, Line Item Number, Transaction Type Code, and Line Item Amount. Details for the FUNDS (Header) record are listed first followed by details for each related FUNDS_TRANS_SPLIT (Line Item) record. In this Example, a Payment was imported for Claim Number 2011055001, Bill Document Number 10010053, Payee Advanced Surgical and Amount 472.51. The related FUNDS_TRANS_SPLIT (Line Item) records are: Line Item 1, Trans Type Code DB, Amount 240.90; Line Item 2, Trans Type Code DB, Amount 91.30; Line Item 3, Trans Type Code DB, Amount 61.11; Line Item 4, Trans Type Code DB, Amount 41.80 and; Line Item 5, Trans Type Code DB, Amount 37.40.

The Balanced Financials section lists all Claim Numbers where the financials were updated based on the payments that were imported. In this Example, the Reserve Current financials were updated for Claim Numbers 2011055001, 2011055002, and 2011055003.

D ProcessLog.txt - Notepad
File Edit Format View Help
Claim Number Validation Completed. Error(s) Found: 0
Patient Tax Id Validation Completed. Error(s) Found: 0
Place of Service Code Validation Completed. Error(s) Found: 0 Transaction Type Code Validation Completed. Error(s) Found: 0
Type of service code validation completed. Error(s) Found: 0
validated paid total between HEADER and corresponding LINEITEMS. Error(s) Found: 0
Check Date validation Completed. Error(s) Found: 0
Closed Claim Validation Completed. Error(s) Found: 22
Frozen Claim Validation Completed. Error(s) Found: 0
Payee Validation Completed. Error(s) Found: 0
Duplicate Transaction Validation Completed. Error(s) Found: 0
Bank Account Validation Completed. Error(s) Found: 0
PAYEE added to Riskmaster. Last Name: Advanced Surgical, First Name: , Tax Id: XXXXX3276
PAYEE added to Riskmaster. Last Name: Austin Pain Associates, First Name: , TAX Id: xxxx7239
PAYEE added to Riskmaster. Last Name: Orthopedic Group of Austin, First Name: , Tax Id: xxxxx8021 Successfully transferred 3 records from HEADER table
Successfully transferred 1 records from LINETER table
Payment Imported into Riskmaster Funds Table: Claim Number: 2011055001, Bill Document Number: 10010053, Payee: Advanced Surgical, Amount 472.51
Payment Imported into Riskmaster Funds Trans Split Table: Line Item Number: 1, Trans_Type_Code: DB, Amount 240.90
Payment Imported into Riskmaster Funds Trans Split Table: Line Item Number: 2, Trans_Type_Code: DB, Amount 91.30
Payment Imported into Riskmaster Funds Trans Split Table: Line Item Number: 3, Trans_Type_Code: DB, Amount 61.11
Payment Imported into Riskmaster Funds Trans Split Table: Line Item Number: 4, Trans_Type_Code: DB, Amount 41.80
Payment Imported into Riskmaster Funds Trans split Table: Line Item Number: 5, Trans_Type_Code: DB, Amount 37.40
Payment Imported into Riskmaster Funds Table: Claim Number: 2011055002, Bill Document Number: 10010044, Payee: Austin Pain Associates, Amount 155.00
Payment Imported into Riskmaster Funds Trans Split Table: Line Item Number: 1, Trans_Type_Code: MED, Amount 155.00 Payment Imported into Riskmaster Funds Table: Claim Number: 2011055003, Bill Document Number: 10010065, Payee: Orthopedic Group of Austin, Amount 335.51
Payment imported into Riskmaster Funds fable. Claim Monet. 2010/0005, Bit Document Nomber. 2010/001, Payment Amount 142.08
Payment imported into Riskmaster Funds frans spilt Table: Line Item Number: 1, frans_type_code: D6, Amount 37.40
Payment imported into Riskmaster Funds Trans split Table: Line Item Number: 3, Trans_Type_Code: DB, Amount 57.15
Payment Imported into Riskmaster Funds Trans Split Table: Line Item Number: 4, Trans_Type_Code: DB, Amount 62.35
Payment Imported into Riskmaster Funds Trans Split Table: Line Item Number: 5, Trans_Type_Code: DB, Amount 36.53
Financials balanced in Reserve_Current_Table for Claim Number: 2011055001
Financials balanced in Reserve_Current_Table for Claim Number: 2011055002
Financials balanced in Reserve_current_Table for Claim Number: 2011055003

 PUS_JOB_PROCESS_Log.txt- This file will be generated when you executed the job. It will contain the information regarding how many rows have been affected after its execution.

314457_PUS_JOB_PROCESS_LOG.txt - Notepad	
File Edit Format View Help	
Payment Update System completed on 20171128 Total Payments records Read = 3,Updated = (Total Detail records Read = 1,Updated = 0,F Total Funds Supplemental records Inserted =	3165412.),Rejected= 3. Rejected= 1. = 0,Updated = (
	-
•	н •

To View Validation Errors

1. From the window that lets you unzip files, open the ErrorLog.txt or the ErrorLog.csv file. Each failed record will list each field that failed validation.

		errorlog0001.csv - Microsof	t Excel					
C	Home Insert Page Layout Formulas Data Review View							
	↓ Cut Calibri 11 ▲ ▲ ■ ■ ₩rap Text La Copy ▲ ● ▲ ■ ■ ₩rap Text ste ✓ Format Painter ● ▲ ■ ■ ₩rap Text	Center - % •		Conditional Formatting ▼	as Table 🕆 St		sert Delete	Format
	Clipboard S Font S Alignment	Number	G I		Styles		Cells	
		1						
	AB	С	D	E	F	G	Н	1
1	Data Error Log for 1st execution of Job #141 J_DIS.							
	Job started at 2010.06.28 18:42:22 using optionset ID 63.							
3	Validatior Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	5	7 COVERAG	SE_TYPE_C	ODE;COVE	RAGE_TYPE	CODE
4	Validatior Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	5	8 COVERAG	SE_TYPE_C	ODE;COVE	RAGE_TYPE	_CODE
5	Validatior Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	5	9 COVERAG	SE_TYPE_C	ODE;COVE	RAGE_TYPE	_CODE
6	Validatior Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	6	0 COVERAG	GE_TYPE_C	ODE;COVE	RAGE_TYPE	_CODE
7	Validatior Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	6	1 COVERAG	GE_TYPE_C	ODE;COVE	RAGE_TYPE	_CODE
8	Validatior Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	6	2 COVERAG	E_TYPE_C	ODE;COVE	RAGE_TYPE	CODE
9	Validatior Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	6	3 COVERAG	E_TYPE_C	ODE;COVE	RAGE_TYPE	CODE
10	Validatior Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	6	4 COVERAG	E_TYPE_C	ODE;COVE	RAGE_TYPE	CODE
11	Validatior Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	6	5 COVERAG	E_TYPE_C	ODE;COVE	RAGE_TYPE	_CODE
12	Validatior Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	6	6 COVERAG	E_TYPE_C	ODE;COVE	RAGE_TYPE	_CODE
13	Validatior Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	6	7 COVERAG	E_TYPE_C	ODE;COVE	RAGE_TYPE	_CODE
14	Validatior Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	6	8 COVERAG	E_TYPE_C	ODE;COVE	RAGE_TYPE	_CODE
15	Validatior Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	6	9 COVERAG	SE_TYPE_C	ODE;COVE	RAGE_TYPE	_CODE
16	Validatior Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	7	0 COVERAG	E_TYPE_C	ODE;COVE	RAGE_TYPE	_CODE

PUS_VALIDATION.txt-

This file will contain information about the validations during the job execution Each failed record will list each field that failed validation.

🔄 314457_PUS_VALIDATION.txt - Notepad	x
File Edit Format View Help	
Payment File, Record No:1, TRANS_ID:60, TRANS_NUMBER cannot be 0. Payment File, Record No:1, TRANS_ID:60, Date of Check cannot be aft Payment File, Record No:2, TRANS_ID:1 not found in RISKMASTER Datab Payment File, Record No:2, TRANS_ID:1, TRANS_NUMBER cannot be Blank Payment File, Record No:3, TRANS_ID:61, Status_Code:A is not found Detail File, Record No:1, TRANS_ID:1153, GL_Account_Code:G is not f	D2 4.
	H.

Scheduling Positive Pay Tasks

To Schedule a Positive Pay Task: One Time

- 1. From the main menu, select Utilities. The Utilities menu opens.
- From the Utilities menu, choose Tools & Designers. The Tools & Designers menu opens.
- From the Tools & Designers menu, choose Task Manager. The Task Manager menu opens.
- 4. From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.
- 5. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

3			
ments Utilitie	es Help		
	Jurisdictional Options Managers System Parameters		
ate of C	Technicians	Claim Type	Claim Status
0,01/4	Tools and Designers 🔸	Adjuster Transfer	Open
9/01/2010	UI Admins	Auto Diary Setup Auto Mail Merge Setup	Open
0/01/2016		Diary Utilities	Open
0/26/2015	PqrTest, MnoATest		Open
0/30/2015	Pqr, Mno	MCM PreFill Folder Utility	Open
0/06/2015	Pqr, Mno	Query Designer Script Editor	Open
1/05/2011	ANDERSON, ROBER	Task Manager	TM Jobs View
1/05/2011	ANDERSON, ROBER	2	View Scheduled Tasks
1/02/2016	Smith, John	Checkers	Open

- 6. From the Task Type drop down list, select the type of task as Positive Pay.
- 7. In the Task Name field, enter the name of the task.
- 8. From the Schedule Type drop down list, select the type of schedule as OneTime.
- 9. Complete the fields on the Schedule a Task: One Time as shown below:

Enter the Date and Time you would like to Run the Task on:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Optionset	Select the button to open the Positive Pay Optionset window.
Cancel	Select the button to close the window without saving the changes.

10. Select the Optionset button.

The Positive Pay Optionset window opens.

11. Complete the fields on the Positive Pay Optionset window and select the Save button. The task is scheduled to run once.

CSC RISKMASTER Accelerator								
RISKMASTER								
→ Diaries	Document Diaries Funds Mainte	nance My Work Reports Search Security Us	ser Documents Utilities Help					
Diary List								
Utilities View Scheduled Tasks	Task Type: Task Name:	Process WPA Diaries Financial History Processing						
	Sub Task Name:	Billing Scheduler						
	Schedule Type	History Tracking Print Batch FROI ACORD						
	Schedule Type	Process Overdue Diaries Policy System Update						
		Print Check Batch Claim Balancing						
		Fraud Analytics Scheduler Auto Mail Merge						
		MBR DDS						
		ISO DIS						
		MMSEA Reserve Balance						
		PositivePay 1099-MISC						
		PSO Currency Exchange Interface Print Batch EOB						

Document Diaries Funds N	laintenance My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Scheduled Ta	sks						
Schedule a Task							
Task Type:	Positi	vePay					
Task Name:	Positi	vePay					
SubTask Name:	None						
Schedule Type:	OneTi	ime					
Enter the Date and Ti	me you would lil	ke to Ru	n the 1	Fask on	-		
				Firma			
Date:	11/03	/2016					
Time:	12:00	PM					

To Schedule a Positive Pay Task: Periodically

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Document Diaries Funds Maintenance My Work Reports Search Security User Documents Utilities Help Utilities => View Scheduled Tasks Schedule a Task Schedule a Task Schedule a Task Image: Comparison of the start Date and Time: Image: Comparison of the start Date								
Schedule a Task Task Type: PositivePay Task Name: PositivePay SubTask Name: None Schedule Type: Periodically Enter the start Date and Time: Date : Date : 11/03/2016 Time : 12:00 PM Enter the interval after which to repeat the task:	Document Diaries Funds Maintenanc	My Work	Reports	Search	Security	User Documents	Utilities	Help
Task Type: PositivePay Task Name: PositivePay SubTask Name: None Schedule Type: Periodically Enter the start Date and Time: Date : Date : 11/03/2016 Time : 12:00 PM Enter the interval after which to repeat the task:	Utilities => View Scheduled Tasks							
Task Name: PositivePay SubTask Name: None Schedule Type: Periodically Enter the start Date and Time: Date : Date : 11/03/2016 Time : 12:00 PM Enter the interval after which to repeat the task:	Schedule a Task							
Task Name: PositivePay SubTask Name: None Schedule Type: Periodically Enter the start Date and Time: Date : Date : 11/03/2016 Time : 12:00 PM Enter the interval after which to repeat the task:								
SubTask Name: None Schedule Type: Periodically Enter the start Date and Time: I1/03/2016 Date : I1/03/2016 Time : I2:00 PM Enter the interval after which to repeat the task:	Task Type:	Positiv	/ePay					
Schedule Type: Periodically Enter the start Date and Time: Date : 11/03/2016 Time : 12:00 PM Enter the interval after which to repeat the task:	Task Name:	Positiv	ePay					
Enter the start Date and Time: Date : 11/03/2016 Time : 12:00 PM Enter the interval after which to repeat the task:	SubTask Name:	None						
Date : 11/03/2016 Time : 12:00 PM Enter the interval after which to repeat the task:	Schedule Type:	Period	ically					
Date : 11/03/2016 Time : 12:00 PM Enter the interval after which to repeat the task:								
Time : 12:00 PM Enter the interval after which to repeat the task:	Enter the start Date and Time	5:						
Time : 12:00 PM Enter the interval after which to repeat the task:	Data :	11/02/	2016					
Enter the interval after which to repeat the task:	Date .	11/03/	2010					
	Time :	12:00	PM					
Interval Type : Weeks V	Enter the interval after which	to repea	t the ta	ask:				
Titerval Type.	Interval Type :	Weeks						
	Intervar Type .	Weeks	, •	_				
Interval : 2	Interval :	2						

- 2. From the Task Type drop down list, select the type of task as Positive Pay.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Periodically.
- 5. Complete the fields on the Schedule a Task: Periodically window as shown below:

Enter Start Date and Time:

Date Enter the start date of the scheduled task or select the date from the calendar.

Time Enter the start time of the scheduled task.

Enter the interval after which to repeat the task:

- Interval Type From the drop down list, select the type of interval after which you want to repeat the task.
- **Interval** Enter the interval after which you want to repeat the task.
- **Optionset** Select the button to open the Positive Pay Optionset window.

Cancel Select the button to close the window without saving the changes.

6. Select the Optionset button.

The Positive Pay Optionset window opens.

7. Complete the fields on the Positive Pay Optionset window and select the Save button. The task is scheduled to run periodically based on the defined interval.

To Schedule a Positive Pay Task: Weekly

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Document Diaries Fu	nds Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Schedu	led Tasks							
Schedule a Task								
Task Type:		Positiv	/ePay					
Task Name:		Positiv	/ePay					
Schedule Type:		Week	y					
			-					
Enter Start Date	and Time:							
Deba								
Date:		11/03/	2016					
Time:		12:00	PM					
Select the days y	ou would like	to Run	the Tas	sk on:				
		🗌 Thu 🗹 Frid	sday dnesday irsday ay urday					
		Optio	nset	Can	cel			

- 2. From the Task Type drop down list, select the type of task as Positive Pay.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Weekly.
- 5. Complete the fields on the Schedule a Task: Weekly as shown below:

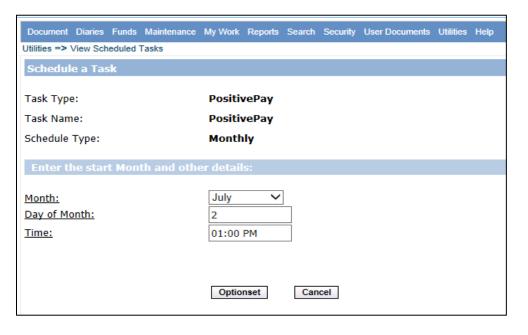
Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Select the days you would like to Run the Task on	Select the check box for a day of the week on which you want to run the scheduled task. <u>Note:</u> You can select more than one day to run the scheduled task.
Optionset	Select the button to open the Positive Pay Optionset window.
Cancel	Select the button to close the window without saving the changes.

- 6. Select the Optionset button.
 - The Positive Pay Optionset window opens.
- 7. Complete the fields on the Positive Pay Optionset window and select the Save button. The task is scheduled to run weekly on the selected days.

To Schedule a Positive Pay Task: Monthly

1. From the View Scheduled Tasks window, select the Schedule a New Task button.



- 2. From the Task Type drop down list, select the type as Positive Pay.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Monthly.
- 5. Complete the fields on the Schedule a Task: Monthly window as shown below:

Enter the start Month and other details

Month	From the drop down list, select the month in which you want to schedule the task.
Day of Month	Enter the date on which you want to schedule the task in the selected month.
Time	Enter the start time of the scheduled task.
Optionset	Select to open the Positive Pay Optionset window.
Cancel	Select the button to close the window without saving the changes.

6. Select the Optionset button.

The Positive Pay Optionset window opens.

7. Complete the fields on the Positive Pay Optionset window and select the Save button. The task is scheduled to run monthly.

To Schedule a Positive Pay Task: Yearly

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

intenance My Work	Reports	Search	Security	User Documents	Utilities	Help
s						
F	Positive	Pay				
F	Positive	Pay				
۱	Yearly					
ime:						
	11/03/2	016				
	12:00 PI	м				
would like to R	un the 1	Fask in	12			
	✓ Febru March April May June July	ary				
	Options	et	Cance	1		
	s me: [would like to R	s Positive Positive Yearly me: 11/03/2 12:00 Pl would like to Run the Janua P Febru April May June July Aug Sep Oct Nov Dec	s PositivePay PositivePay Yearly me: 11/03/2016 12:00 PM would like to Run the Task in January February March April May June July KAug Sep Oct Nov	s PositivePay PositivePay Yearly me: 11/03/2016 12:00 PM would like to Run the Task in: January February March April May June July March July Sep Oct Nov Dec	s PositivePay PositivePay Yearly me: 11/03/2016 12:00 PM vould like to Run the Task in: January February January February April May June July Sep Oct Nov Dec	PositivePay PositivePay Yearly me: 11/03/2016 12:00 PM vould like to Run the Task in: Danuary Pebruary Danuary Pebruary March April Danue Dune Dune Dune Dune Dune Dune Dune Dune Dune

- 2. From the Task Type drop down list, select the type of task as Positive Pay.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Yearly.
- 5. Complete the fields on the Schedule a Task: Yearly window as shown below:

Enter Start Date and Time:

	Date	Enter the start date of the scheduled task or select the date from the calendar.
	Time	Enter the start time of the scheduled task.
	Select the months you would like to	Select the check box for the month in which you want to schedule the task to run.
	Run the Task in:	Note: You can select more than one month to schedule the task to run.
	Optionset	Select the button to open the Positive Pay Optionset window.
	Cancel	Select the button to close the window without saving the changes.
6.	Select the Optionset butto	on.

The Positive Pay Optionset window opens.

7. Complete the fields on the Positive Pay Optionset window and select the Save button. The task is scheduled to run yearly.

Positive Pay Optionset window

To open, from the View Scheduled Task window, select the Optionset button.

Import/Export → Export

Positive Pay			
Optionset Name *	Import/ Export *	File Name *	Bank Format *
	EXPORT .		Select 🔻
Bank Account*	File Format	Company Name/Title	Destination/Receiving Location
	Select		
Manually Change Date Range	From Date	To Date	
	MM/dd/yyyy	MM/dd/yyyy	

Import/Export →Import

Positive Pay						
8						
Optionset Name*	Import/ Export *		File Format*		File To Process*	
	IMPORT	٧	Select	v		Q

Export

Optionset Name	Enter the name of the option set. The Option Name is required.
Bank Format	From the drop down list, select the type of bank account to schedule the task.
Manually Change Date Range	Select the check box if you want to manually modify the check date range.
Check Range From Date	Select the button to select the check date range from the calendar.
Target File Name	Enter file name of the target file.
Bank Account	From the drop down list, select a bank account to extract the file to.
Save	Select to save the changes.
Cancel	Select the button to close the window without saving the changes.
Import	
Optionset Name	Enter the name of the option set. The Option Name is required.

File Format	From the drop down list, select the file format.
File To Process	Enter the file location or select the Browse button to navigate to the file.
Save	Select the button to save the changes.
Cancel	Select the button to close the window without saving the changes.

Scheduling Medical Bill Review (MBR) Tasks

To Schedule an MBR Task: One Time

- From the main menu, select Utilities. The Utilities menu opens.
- 2. From the Utilities menu, choose Tools & Designers. The Tools & Designers menu opens.
- From the Tools & Designers menu, choose Task Manager. The Task Manager menu opens.
- 4. From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.
- 5. From the View Scheduled Tasks window, select the 'Schedule a New Task' button. The View Scheduled Task window opens.

В			
uments Utilitie	es Help		
	Jurisdictional Options) Managers) System Parameters)		
ate of C	Technicians	Claim Type	Claim Status
10/01/2	Tools and Designers	Adjuster Transfer	Open
09/01/2010	UI Admins	Auto Diary Setup	Open
10/01/2016		Auto Mail Merge Setup Diary Utilities	Open
10/26/2015	PqrTest, MnoATest		Open
10/30/2015	Pqr, Mno	MCM PreFill Folder Utility	Open
10/06/2015	Pqr, Mno	Query Designer Script Editor	Open
1/05/2011	ANDERSON, ROBE	Task Manager	TM Jobs View
1/05/2011	ANDERSON, ROBE	-	View Scheduled Tasks
1/02/2016	Smith, John	Checkers	Open

- 6. From the Task Type drop down list, select the type of task as MBR.
- 7. In the Task Name field, enter the task name.
- 8. From the Schedule Type drop down list, select the type of schedule as OneTime.
- 9. Complete the fields on the Schedule a Task: One Time window as shown below:

Enter the start Month and other details:

Date	Enter the start date of the scheduled task or select the date from the
	calendar.

Time Enter the start time of the scheduled task.

Optionset Select the button to open the MBR Settings window.

Cancel Select the button to close the window without saving the changes.

10. Select the Optionset button.

The MBR Settings window opens.

11. Complete the fields on the MBR Settings window and select the Apply button. The task is scheduled to run once.

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Document Diaries Funds Mainte	enance My Work Reports Search Sec	curity User Documents	Utilities	Help	
Utilities => View Scheduled Tasks					
Task Type:	Process WPA Diaries				
Task Name:	Financial History Processing Billing Scheduler				
Sub Task Name:	BES Scheduler History Tracking				
Schedule Type Print Batch FROI ACORD Process Overdue Diaries					
	Policy System Update Print Check Batch				
	Claim Balancing Fraud Analytics Scheduler				
	Auto Mail Merge MBR				
	DDS ISO				
Reserve Balance					
PositivePay 1099-MISC					
	PSO Currency Exchange Interface Print Batch EOB				

Document Diaries Funds	Maintenance My Work	Reports Sea	ch Security	User Documents	Utilities	Help
Utilities => View Scheduled T	Tasks					
Schedule a Task						
Task Type:	MBR					
Task Name:	MBR					
SubTask Name:	None					
Schedule Type:	OneTi	ne				
Enter the Date and T	time you would like	to Run the	Task on:			
cifter the bate and	nine you would like	to Kull the	Task off.			
Date:	11/02/	/2016	P			
Time:	04:50	PM				
	Opti	onset	Cancel			

To Schedule an MBR Task: Periodically

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Document Diaries Fun	ds Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Schedul	ed Tasks							
Schedule a Task								
To als Tree as		MBR						
Task Type:			-					
Task Name:		MBR	2					
SubTask Name:		Non	e					
Schedule Type:		Peri	odically					
Enter the start Da	ate and Time:							
Date :		11/0	2/2016					
Time :		04:5	55 PM					
Enter the interval	after which t	o repea	t the ta	sk:				
Interval Type :		We	eks 🗸					
Interval :		2						
		O	otionset		Cancel			

- 2. From the Task Type drop down list, select the type of task as MBR.
- 3. In the Task Name field, enter the task name.
- 4. From the Schedule Type drop down list, select the type of schedule as Periodically.
- 5. Complete the fields on the Schedule a Task: Periodically window as shown below:

Enter Start Date and Time:

Date Enter the start date of the scheduled task or select the date from the calendar.

Time Enter the start time of the scheduled task.

Enter the interval after which to repeat the task:

- Interval Type From the drop down list, select the type of interval after which you want to repeat the task.
- **Interval** Enter the interval after which you want to repeat the task.
- **Optionset** Select the button to open the MBR Settings window.
- **Cancel** Select the button to close the window without saving the changes.
- 6. Select the Optionset button.
 - The MBR Settings window opens.
- 7. Complete the fields on the MBR Settings window and select the Apply button. The task is scheduled to run periodically based on the defined interval.

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To Schedule an MBR Task: Weekly

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Document Diaries Fund	s Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Schedule	d Tasks							
Schedule a Task								
Task Type:		MBR						
Task Name:		MBR	2					
Schedule Type:		Wee	kly					
Enter Start Date a	nd Time:							
Date:		11/0)2/2016		A			
Time:		05:0	0 PM					
Select the days yo	u would like	to Run t	he Ta <i>s</i> k	on:				
			Ionday					
			uesday					
			Vednesda	зу				
		П	hursday					
		🖌 E	riday					
		🗆 <mark>S</mark>	aturday					
		🗆 <mark>S</mark>	unday					
		Op	otionset		Cancel			

- 2. From the Task Type drop down list, select the type of task as MBR.
- 3. In the Task Name field, enter the task name.
- 4. From the Schedule Type drop down list, select the type of schedule as Weekly.
- 5. Complete the fields on the Schedule a Task: Weekly window as shown below:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.		
Time	Enter the start time of the scheduled task.		
Select the days you would like to Run the Task on	Select the check box for a day of the week on which you want to run the scheduled task.		
Run the rask on	Note: You can select more than one day to run the scheduled task.		
Optionset	Select the button to open the MBR Settings window.		
Cancel	Select the button to close the window without saving the changes.		
In at the or Oration and builter	-		

6. Select the Optionset button.

The MBR Settings window opens.

7. Complete the fields on the MBR Settings window and select the Apply button.

The task is scheduled to run weekly on the days selected.

To Schedule an MBR Task: Monthly

1. From the View Scheduled Tasks window, select the Schedule a New Task button.

Document Diaries Funds	Maintenance My Work	Reports Search	Security	User Documents	Utilities	Help
Utilities => View Scheduled	Tasks					
Schedule a Task						
Task Type:	MBR	t i				
Task Name:	MBR	t i i i i i i i i i i i i i i i i i i i				
Schedule Type:	Mon	thly				
Enter the start Mon	th and other detail	5:				
Month:	July	~				
Day of Month:	2					
		0.004				
Time:	04:0	00 PM				
	Op	otionset	Cancel			

- 2. From the Task Type drop down list, select the type of task as MBR.
- 3. In the Task Name field, enter the task name.
- 4. From the Schedule Type drop down list, select the type of schedule as Monthly.
- 5. Complete the fields on the Schedule a Task: Monthly window as shown below:

Enter the start Month and other details:

Month	From the drop down list, select the month in which you want to schedule the task.
Day of Month	Enter the date on which you want to schedule the task in the selected month.
Time	Enter the start time of the scheduled task.
Optionset	Select the button to open the MBR Settings window.
Cancel	Select to close the window without saving the changes.
elect the Optionset butto	n

6. Select the Optionset button.

The MBR Settings window opens.

7. Complete the fields on the MBR Settings window and select the Apply button. The task is scheduled to run monthly.

To Schedule an MBR Task: Yearly

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Document Daries Fund	s Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Schedule	d Tasks							
Schedule a Task								
Task Type:			MBR					
Task Name:			MBR					
Schedule Type:			Year	ły				
Enter Start Date a	nd Time:							
Date:			11/0	2/2016		110		
Time			05:3					
<u>Time:</u>			05:3	л ым				
Select the months	you would li	ke to Ru	n the Ta	skin:				
			🗌 Ja	nuary				
				ebruary				
				arch				
			— М — Ли					
			S	₽p				
				ct				
				ec.				
			0.0	tionset		Cancel		
				cionset		cancer		

- 2. From the Task Type drop down list, select the type of task as MBR.
- 3. In the Task Name field, enter the task name.
- 4. From the Schedule Type drop down list, select the type of schedule as Yearly.
- 5. Complete the fields on the Schedule a Task: Yearly window as shown below:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.			
Time	Enter the start time of the scheduled task.			
Select the months you would like to	Select the check box for the month in which you want to schedule the task to run.			
Run the Task in:	Note: You can select more than one month to schedule the task to run.			
Optionset	Select the button to open the MBR Settings window.			
Cancel	Select the button to close the window without saving the changes.			
elect the Ontionset butto				

6. Select the Optionset button.

The MBR Settings window opens.

7. Complete the fields on the MBR Settings window and select the Apply button.

The task is scheduled to run yearly.

MBR Settings Window

To open from the View ScheduledTask window, select the Option set button.

Document Diaries Funds Maintenance My Wor	k Reports Search Security User Documents (Jtilities Help	
Utilities => View Scheduled Tasks			0 🗙
Medical Bill Review -> Import			· · · · · · · · · · · · · · · · · · ·
Optionset Name *		Select Import File *	
			Q
Data Import Settings			
Allow Payments on Closed Claims	No Payments on Frozen Claims	Import Reason (EOB Code)	Import Medical Data
Import Printed Checks	Import Providers Invoice Number	Queued Payments	Notify\Reject if Insufficient Reserves
Payee Search Criteria			
Use First Entity	Use Suffix Code to Identify Entities	Search by SSN Only	Use Zip Code for Payee Lookup
Use Import Payee Info for Payment	Do Not Add New Payees		
Payment Duplicate Search			
Exclude Invoice Number	Inlcude Voids in Search	Use Service Dates not Trans Date	
			-

Screenshot of Export settings for when Export Type is Entity.

Document Diaries Funds Maintenance My Work	k Reports Search Security User Documents Uti	lities Help	
Utilities => View Scheduled Tasks			0 🗙
Medical Bill Review -> Export			
Optionset Name *	Export Type	Entity Export Last Run Date	Export From Date
	Entity v	02/15/2018	MM/dd/yyyy
Entity Category	People Type	Entity Type	Include Entity Suffix in File
Use Source File for Suffix Updates	Update Entity Suffix for All Entities		

Screenshot of Export settings when Export Type is Claim.

Document Diaries Funds Maintenance My Work	Reports Search Security User Documents U	tilities Help	
Utilities => View Scheduled Tasks			@ X
Medical Bill Review -> Export			
Optionset Name *	Export Type	Claim Export Last Run Date	Export From Date
	Claim 🔻	02/15/2018	MM/dd/yyyy
Line of Business	Claim Status	Service Code	Claim Adjuster
			<u> </u>
Organization Hirearchy	Remove SSN from file		

Export Type

OptionSet Name

Enter the name of the option set. The Option Name is required.

Export Type

Claim	Select the radio button to export Claim data.	
Entity	Select the radio button to export Entity data.	
Claim Export Options		
Claim Export Last Run Date (Claim option Selected)	 Displays the date from which the last Claim Export job ran. If Export from Date is not entered, this date will be used to determine which claims to extract when the job runs. If blank and Export from Date is blank, then all Claims will be extracted. Export from Date for more info on repeating schedules 	
Claim Export Last Run Date (Entity option Selected)	Displays the date from which the last Entity Export job ran for user's information only.	
Export from Date (Claim Option Selected)	If entered, this date will be used to determine the start date for which claims to extract. Note: When scheduling the Claim Extract to run more than once,	
	this date will only be used on the first run and then the Last Run Date is used to only extract changed/added claims. You may need to enter an Export from Date for the first run to extract Claims from a desired starting date.	
Export from Date (Entity	If entered, this date will be used to determine the start date for which	
Option Selected)	Entities to extract for first run and for next subsequent run of scheduled job the last completion date will act as from date for which Entities to extract. Note: If not entered, then all the entities will be extracted.	
Option Selected) Remove SSN from File	scheduled job the last completion date will act as from date for which Entities to extract.	
	 scheduled job the last completion date will act as from date for which Entities to extract. Note: If not entered, then all the entities will be extracted. Select the check box if the Social Security Number is not to be 	
Remove SSN from File	 scheduled job the last completion date will act as from date for which Entities to extract. Note: If not entered, then all the entities will be extracted. Select the check box if the Social Security Number is not to be included in the Claim Export file. From the list box select the Line of Business to export Claim data for. To select multiple Lines of Business hold down the Ctrl key while 	
Remove SSN from File Line of Business	 scheduled job the last completion date will act as from date for which Entities to extract. Note: If not entered, then all the entities will be extracted. Select the check box if the Social Security Number is not to be included in the Claim Export file. From the list box select the Line of Business to export Claim data for. To select multiple Lines of Business hold down the Ctrl key while selecting Lines of Business. Select the Organization Hierarchy from the Search button, a tree view is opened depicting the hierarchy from the Organization to the 	
Remove SSN from File Line of Business Organization Hierarchy	 scheduled job the last completion date will act as from date for which Entities to extract. Note: If not entered, then all the entities will be extracted. Select the check box if the Social Security Number is not to be included in the Claim Export file. From the list box select the Line of Business to export Claim data for. To select multiple Lines of Business hold down the Ctrl key while selecting Lines of Business. Select the Organization Hierarchy from the Search button, a tree view is opened depicting the hierarchy from the Organization to the department level. 	
Remove SSN from File Line of Business Organization Hierarchy Claim Status	 scheduled job the last completion date will act as from date for which Entities to extract. Note: If not entered, then all the entities will be extracted. Select the check box if the Social Security Number is not to be included in the Claim Export file. From the list box select the Line of Business to export Claim data for. To select multiple Lines of Business hold down the Ctrl key while selecting Lines of Business. Select the Organization Hierarchy from the Search button, a tree view is opened depicting the hierarchy from the Organization to the department level. Select the claim status such as Open, Closed etc. From the list box select the Service codes, claims having the service 	

Entity Role OFF: Only the Adjuster Entities will be displayed.

Select the check box to include the Entity Suffix in the Entity Export file.
Select the check box to use the source file for suffix updates. When selected, the Suffix is updated on the Entity records.
Select the check box to update entity suffix for all entities. <u>Note:</u> This file is displayed only when the Use source file for Suffix Updates check box is selected.
From the list box select the type of Entities to export. To select multiple Entity Types, hold down the Ctrl key while selecting Entity Types.
Select the button to save the changes.
Select the button to cancel the process.

Document Diaries Funds Maintenance My Work	Reports Search Security User Documents U	tilities Help	
Utilities => View Scheduled Tasks			© ×
Medical Bill Review -> Import			·
Optionset Name *		Select Import File *	
			٩
Data Import Settings			
Allow Payments on Closed Claims	No Payments on Frozen Claims	Import Reason (EOB Code)	Import Medical Data
Import Printed Checks	Import Providers Invoice Number	Queued Payments	Notify\Reject if Insufficient Reserves
Payee Search Criteria			
Use First Entity	Use Suffix Code to Identify Entities	Search by SSN Only	Use Zip Code for Payee Lookup
Use Import Payee Info for Payment	Do Not Add New Payees		
Payment Duplicate Search			
Exclude Invoice Number	Inlcude Voids in Search	Use Service Dates not Trans Date	
			-

Document Diaries Funds Maintenance My Work	Reports Search Security User Documents Utili	ties Help		
Utilities => View Scheduled Tasks				6 🗙
Medical Bill Review -> Import				-
Use Import Payee Info for Payment	Do Not Add New Payees			
Payment Duplicate Search				
Exclude Invoice Number	Inlcude Voids in Search	Use Service Dates not Trans Date		ł
Fee Payments				
Use Fee Payments	Jurisdictional Medical Reserve	Jurisdictional Other Reserve	Set Enclosure Flag for Fee Payments	
		•••		
Medical Reserve				
Transaction Type	Payment Date	Identifier	Printed Status	- 1
Select 🔻	Select 🔻			- 1
Other Reserve				
Transaction Type	Payment Date	Identifier	Printed Status	- 1
Select V	Select			-

Import Settings	
OptionSet Name	Enter the name of the option set. The Option Name is required.
File Setting	
Access	Select the option if you want to import the Access file. Enter the file location or select the Browse button to navigate to the file.
Pipe	Select the option if you want to import the Pipe file. Enter the file location or select the Browse button to navigate to the file.
Data Import Setting	
Allow Payments on Closed Claims	Select the check box to allow payments on closed claims, with the reserves auto adjusted to meet the payment amount.
Check Encl. Flag for MBR Fee Payments true	Select the check box if you want to include enclosures attached with checks in the fee payments.
No Payments on Frozen Claims	Select the check box to halt payments for frozen claims.

Import Reason (EOB Code)	Select the check box to import Explanation of Benefits reason code.
Import Medical Data	Select the check box to import Medical Data.
Notify\Reject if Insufficient Reserves	Select the check box if you want the MBR utility to notify or reject the payments from insufficient reserves.
Use Suffix code to identify Entities	Select the check box if you want to use Suffix code for the identification of entities.
Import Printed Checks	Select the check box if you want to import the printed checks.
Import Provider's Invoice Number	Select the check box if you want to import the Provider's Invoice Number.
Queued Payment	Select the check box if you want to import payments with a Queued status.
Payee Search Criteria	
Use First Entity Listed in RM	Select the check box to use the first entity entered in RISKMASTER for the entity search.
Search by SSN only	Select the check box to use the character stripped tax ID or SSN for the entity search.
Use Zip Code For Payee Lookup	Select the check box to use the zip codes during payee search.
Do not add new Payees	Select the check box if you do not want to add new payees to the medical bill.
Use Import Payee Info For Payment	Select the check box if you do not want to use payee information in the supplied import file.
Payment Duplicate Search	
Exclude Invoice Number	Select the check box to exclude invoice number in the duplicate payment search.
Include Voids in Search	Select the check box to include voids in the search.
Use Service Dates not Trans Date	Select the check box to use the date on which the service was rendered in place of the date on which the transaction was made.
Fee Payments	
Use Fee Payment	Select check box to enable the options for setting up Fee Payments. The Fee Payment options must be set when Fee Payments are included in the import file. Otherwise the Fee Payments will not be imported.
Jurisdictions	The list box contains a list of jurisdictions.
Jurisdiction Medical Reserve	Select a jurisdiction from the Jurisdiction list box and select the > button beside the Jurisdiction Medical Reserve list box to indicate which Jurisdictions Medical Reserves will be applied to.

Jurisdiction Other Reserve	To remove a jurisdiction, select a jurisdiction from the Jurisdiction Medical Reserve list box and select the < arrow next to the list box. Select a jurisdiction from the Jurisdiction list box and select the > button beside the Jurisdiction Other Reserve list box to indicate which Jurisdictions Other Reserves will be applied to.
Medical Reserve	 To remove a jurisdiction, select a jurisdiction from the Jurisdiction Other Reserve list box and select the < arrow next to the list box. Transaction Type: From the drop down list, select a medical reserve transaction type. Payment Date: From the drop down list, select a medical reserve payment date. Identifier: Enter the medical reserve identifier number. Printed Status: Select the check box if you want print checks for the medical reserve fee.
Other Reserve	 Transaction Type: From the drop down list, select the transaction type for other reserves. Payment Date: From the drop down list, select the payment date for other reserves. Identifier: Enter the medical reserve identifier number. Printed Status: Select the check box if you want to track the incoming MBR fee on claims, and not print checks for this fee.
Save	Select the button to save the changes.
Cancel	Select the button to cancel the process.

NOTE: Starting from rmA 16.4 onwards we have provided a facility in MBR attachment name where bill document number could be of any size (max 25). Existing functionality says that bill document number should be first 12 characters in bill document name.

E.g.: Bill Document Number: 123456789 Claim Number: WC2016000545 Image Name would be: 000123456789WC2016000545.pdf

Now user is given a node in dataIntegrator.config to specify special character to be used in attachment name as the separator for bill Document number and Claim number. The special character must of be either of these -#_- else the attachment functionality will not work correctly.

Eg: Bill Document Number: CAL-MDMO-123456789 Claim Number: WC2016000545 Separator: '#' Image Name would be: CAL-MDMO-123456789#WC2016000545.pdf

Scheduling MMSEA Tasks

To Schedule a MMSEA Task: One Time

- 1. From the main menu, select Utilities. The Utilities menu opens.
- 2. From the Utilities menu, choose Tools & Designers. The Tools & Designers menu opens.
- 3. From the Tools & Designers menu, choose Task Manager. The Task Manager menu opens.
- 4. From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.

From the View Scheduled Tasks window, select the 'Schedule a New Task' button. The View Scheduled Task window opens.

В					
iments Utilities Help					
Jurisdictional Option Managers System Parameters	•				
ate of C Technicians	•	Claim Type		Claim Status	
L0/01/2 Tools and Designers	s 🕨	Adjuster Transfer		Open	
09/01/2010 UI Admins	•	Auto Diary Setup		Open	
10/01/2016		Auto Mail Merge Setup Diary Utilities		Open	
L0/26/2015 PqrTest, MnoAT	Fest	History Tracking	•	Open	
L0/30/2015 Pqr, Mno		MCM PreFill Folder Utility		Open	
10/06/2015 Pqr, Mno		Query Designer		Open	
1/05/2011 ANDERSON, RC	BER	Script Editor Task Manager	•	TM Jobs Viev	v
1/05/2011 ANDERSON, RC	BER	Transaction Type Change		View Schedul	-
11/02/2016 Smith, John		Checkers		Open	

- 5. From the Task Type drop down list, select the type of task as MMSEA.
- 6. In the Task Name field, enter the name of the task.
- 7. From the Schedule Type drop down list, select the type of schedule as OneTime.
- 8. Complete the fields on the Schedule a Task: One Time as shown below:

Enter the Date and Time you would like to Run the Task on:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Optionset	Select the button to open the MMSEA Optionset window.

Cancel

Select the button to close the window without saving the changes.

- Select the Optionset button.
 The MMSEA Optionset window opens.
- 10. Complete the fields on the MMSEA Optionset window and select the Save button. The task is scheduled to run one time.

CSC RISKM	ASTER Acce	lerator	
CLISKMASTER	Document Diaries Funds Mainte Utilities => View Scheduled Tasks Task Type: Task Name: Sub Task Name: Schedule Type	Process WPA Diaries Financial History Processing Billing Scheduler BES Scheduler History Tracking Print Batch FROI ACORD Process Overdue Diaries Policy System Update Print Check Batch Claim Balancing Fraud Analytics Scheduler Auto Mail Merge MBR DDS ISO DIS MMSEA Reserve Balance PositivePay 1099-MISC PSO	rity User Documents Utilities Help
		Currency Exchange Interface Print Batch EOB	

Document Diaries Funds Ma	aintenance My Work	Deporte	Search	Security	Llear Documente	Littilitiae	Halp
Utilities => View Scheduled Tas		Reports	Search	Security	User Documents	Oundes	Theip
Schedule a Task							
Schedule a Task							
Task Type:	MMSE	A					
Task Name:	MMSE	A					
SubTask Name:	None						
Schedule Type:	OneTi	me					
Enter the Date and Tin	ne you would lik	e to Ru	n the 1	Fask on	:		
Date:	11/03/	2016					
Date.	11/03/	2010					
Time:	12:30	PM					
	Option	nset	Can	cel			

To Schedule a MMSEA Task: Periodically

1. From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.

Document Diaries Funds Maintenance	My Work Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Scheduled Tasks						
Schedule a Task						
Task Type:	MMSEA					
Task Name:	MMSEA					
SubTask Name:	None					
Schedule Type:	Periodically					
Enter the start Date and Time:						
Date :	11/03/2016					
<u></u>	11/03/2010					
Time :	12:30 PM					
Enter the interval after which	to repeat the ta	ask:				
Interval Type :	Weeks 🗸					
Interval :	2					

- 2. From the Task Type drop down list, select the type of task as MMSEA.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Periodically.
- 5. Complete the fields on the Schedule a Task: Periodically window as shown below:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the
	calendar.

Time Enter the start time of the scheduled task.

Enter the interval after which to repeat the task:

Interval Type	From the drop down list, select the type of interval after which you want to repeat the task.
Interval	Enter the interval after which you want to repeat the task.

Optionset Select to open the MMSEA Optionset window.

Cancel

Select the button to close the window without saving the changes.

- Select the Optionset button.
 The MMSEA Optionset window opens.
- 7. Complete the fields on the MMSEA Optionset window and select the Save button. The task is scheduled to run periodically based on the defined interval.

To Schedule a MMSEA Task: Weekly

 From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.

Document Diaries Fund	ds Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Schedule	d Tasks							
Schedule a Task								
Task Type:		MMSE	Α					
Task Name:		MMSE	A					
Schedule Type:		Weekl	У					
Enter Start Date a	nd Time:							
Date:		11/03/	2016					
Times		12:30		_				
Time:		12:30	РМ					
Select the days yo	ou would like	to Run	the Tas	k on:				
		🗌 Thu 🗹 Frid	sday dnesday irsday ay urday					
		Optio	nset	Can	cel			

- 2. From the Task Type drop down list, select the type of task as MMSEA.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Weekly.
- 5. Complete the fields on the Schedule a Task: Weekly window as shown below:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Select the days you would like to	Select the check box for a day of the week on which you want to run the scheduled task.
Run the Task on	Note: You can select more than one day to run the scheduled task.
Optionset	Select to open the MMSEA Optionset window.
Cancel	Select the button to close the window without saving the changes.

- Select the Optionset button. The MMSEA Optionset window opens.
- Complete the fields on the MMSEA Optionset window and select the Save button. The task is scheduled to run weekly on the days selected.

To Schedule a MMSEA Task: Monthly

1. From the View Scheduled Tasks window, select the 'Schedule a New Task' button.

Document Diaries Funds Maintenance					11 B		
	IVIY VVOIK	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Scheduled Tasks							
Schedule a Task							
Task Type:	MMSE/	A					
Task Name:	MMSE	A					
Schedule Type:	Month	ly					
Enter the start Month and oth	er details	s:					
Month: Day of Month: Time:	July 4 01:30 F	~ РМ					
	Optior	nset	Can	cel			

- 2. From the Task Type drop down list, select the type of task as MMSEA.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Monthly.
- 5. Complete the fields on the Schedule a Task: Monthly window as shown below:

Enter the start Month and other details:

Month	From the drop down list, select the month in which you want to schedule the task.
Day of Month	Enter the date on which you want to schedule the task in the selected month.
Time	Enter the start time of the scheduled task.
Optionset	Select to open the MMSEA Optionset window.
Cancel	Select the button to close the window without saving the changes.

6. Select the Optionset button.

The MMSEA Optionset window opens.

7. Complete the fields on the MMSEA Optionset window and select the Save button. The task is scheduled to run monthly.

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To Schedule a MMSEA Task: Yearly

- 1. From the Task Manager menu, choose View Scheduled Tasks.
 - The View Schedule Task window opens.

	k Reports Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks	
Schedule a Task	
Task Type:	MMSEA
Task Name:	MMSEA
Schedule Type:	Yearly
Schedule Type.	Carly
Enter Start Date and Time:	
Date:	11/03/2016
_	
Time:	01:30 PM
Select the months you would like to	Run the Task In:
	□ January
	✓ February
	March
	April
	☐ May □ June
	□ June □ July
	✓ Sep
	Oct
	Dec
	Orticoast Const
	Optionset Cancel

- 2. From the Task Type drop down list, select the type of task as MMSEA.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Yearly.
- 5. Complete the fields on the Schedule a Task: Yearly window as shown below:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Select the months you would like to Run the Task in:	Select the check box for the month in which you want to schedule the task to run. <u>Note:</u> You can select more than one month to schedule the task to run.
Optionset	Select the button to open the MMSEA Optionset window.
Cancel	Select the button to close the window without saving the changes.

6. Select the Optionset button.

The MMSEA Optionset window opens.

7. Complete the fields on the MMSEA Optionset window and select the Save button. The task is scheduled to run yearly.

MMSEA Optionset window

To open From the View Scheduled Task window, select the Optionset button.

Import/Export → Export

MMSEA			
8			
Optionset Name*	Import/ Export*	RRE Id *	File Format*
	Export •	Select •	Select v
Test Export	Export Only Primary Claimants	Don't Include TPOCs Under Threshold	Claim Type *
Diary Settings			
Do Not Send Diary Notification	Send Diary To Current Adjuster	Send Diary To Other User(s)	Select Users

Import/Export →Import

Import/ Export *	RRE Id *	File Format*	
Import	▼ Select	• Select	۳
TIN Import File	a.		
Send Diary To Current Adjuster	Send Diary To Other User(s)	Select Users	
	TIN Import File	Import Select TIN Import File Q Send Diary To Current Adjuster Send Diary To Other User(s)	Import Select TIN Import File Q Send Diary To Current Adjuster Send Diary To Current Adjuster Send Diary To Other User(s) Select Users

Export	
Optionset Name	Enter the name of the option set. The Option Name is required.
RRE Id	From the drop down list, select the Medicare responsible reporting entity identification number.

File Format	From the drop down list, select the file format.
Claim Option	Displays only when the File Format is set to Claim Input.
Test Export	Select the check box to check for test the MMSEA file before export.
Export Only Primary Claimants	Select the check box to include only the Primary Claimant(s) in the export file.
Don't Include TPOCs if Under the Threshold(Only if Claim option is selected in file format)	Select the check box to export TPOCs only if they are above the threshold.
Claim Type Filter	Select the claim type from the claim type filter
Diary Settings	
Do Not Send Dairy Notification	Dairy Notification will not be send if this checkbox is selected
Send Diary to Current Adjuster	Select the checkbox to send diary notification to Current Adjuster
Send Diary to other User(s)	Select the checkbox to send diary notification to other users
Save	Select to save the changes.
Cancel	Select the button to close the window without saving the changes.

Import

Optionset Name	Enter the name of the option set. The Option Name is required.
RRE Id	From the drop down list, select the Medicare responsible reporting entity identification number.
File Format	From the drop down list, select the file format.
Import File	Enter the location of the import file or select the Browse button to navigate to the import file.
TIN Import File	Displays only when the File Format is set to Claim. Enter the location of the TIN import file or select the Browse button to navigate to the import file.
Diary Settings	
Do Not Send Dairy Notification	Diary Notification will not be send if this checkbox is selected
Send Diary to Current Adjuster	Select the checkbox to send diary notification to Current Adjuster
Send Dairy to other User(s)	Select the checkbox to send dairy notification to other users
Save	Select to save the changes.
Cancel	Select the button to close the window without saving the changes.

Scheduling 1099 Miscellaneous Tasks

To Schedule a 1099 Misc. Task: One Time

- From the main menu, select Utilities. The Utilities menu opens.
- 2. From the Utilities menu, choose Tools & Designers. The Tools & Designers menu opens.
- From the Tools & Designers menu, choose Task Manager. The Task Manager menu opens.
- 4. From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.
- 5. From the View Scheduled Tasks window, select the 'Schedule a New Task' button.

В			
iments Utili	ities Help		
	Jurisdictional Options Managers System Parameters		
ate of C	Technicians 🕨	Claim Type	Claim Status
0/01/2	Tools and Designers 🕨	Adjuster Transfer	Open
9/01/201	UI Admins	Auto Diary Setup	Open
0/01/2010	6	Auto Mail Merge Setup Diary Utilities	Open
0/26/2015	5 PqrTest, MnoATest	History Tracking	Open
0/30/2015	5 Pqr, Mno	MCM PreFill Folder Utility	Open
0/06/2019	5 Pqr, Mno	Query Designer	Open
1/05/201	1 ANDERSON, ROBER	Script Editor Task Manager	TM Jobs View
1/05/201	1 ANDERSON, ROBER	2	View Scheduled Tasks
1/02/2016	6 Smith, John	Checkers	Open

- 6. From the Task Type drop down list, select the type of task as 1099-MISC.
- 7. In the Task Name field, enter the name of the task.
- 8. From the Schedule Type drop down list, select the type of schedule as OneTime.

9. Complete the fields on the Schedule a Task: One Time window as shown below:

Enter the Date and Time you would like to Run the Task on:
--

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Optionset	Select the button to open the 1099 Optionset window.
Cancel	Select the button to close the window without saving the changes.

10. Select the Optionset button.

The 1099 Optionset window opens.

11. Complete the fields on the 1099 Optionset window and select the Save button. The task is scheduled to run one time.

CSC RISKMASTER Accelerator								
RISKMASTER								
Cocurrent Diaries Funds Maintena Utilities Diary List Utilities View Scheduled Tasks Task Type: Task Name: Sub Task Name: Schedule Type	Ince My Work Reports Search Security User Documents Utilities Help Process WPA Diaries Financial History Processing Billing Scheduler BES Scheduler History Tracking Print Batch FROI ACORD Process Overdue Diaries Policy System Update Print Check Batch Claim Balancing Fraud Analytics Scheduler Auto Mail Merge MBR DDS ISO DIS MMSEA Reserve Balance PositivePay 1099-MISC PSO Currency Exchange Interface							

Document Diaries Funds Maintenan	e My Work Reports Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks	
Schedule a Task	
Task Type:	1099-MISC
Task Name:	1099-MISC
SubTask Name:	None
Schedule Type:	OneTime
Enter the Date and Time yo	would like to Run the Task on:
Data	11/03/2016
Date:	11/03/2016
Time:	05:00 PM
	Optionset Cancel

To Schedule a 1099 Misc. Task: Periodically

1. From the View Scheduled a Tasks window, select the 'Schedule a New Task' button. The View Scheduled Task window opens.

Document Diaries Funds Maintenau	ce My Work Reports Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks	
Schedule a Task	
Task Type:	1099-MISC
Task Name:	1099-MISC
SubTask Name:	None
Schedule Type:	Periodically
Enter the start Date and Tir	o.
Enter the start Date and Th	ାପ.
Date :	11/03/2016
T :	
<u>Time :</u>	05:00 PM
Enter the interval after whi	h to repeat the task:
Interval Type :	Weeks 🗸
Interval :	2
	Optionset Cancel

- 2. From the Task Type drop down list, select the type of task as 1099-MISC.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Periodically.
- 5. Complete the fields on the Schedule a Task: Periodically window as shown below:

Enter Start Date and Time:

- Date Enter the start date of the scheduled task or select the date from the calendar.
- **Time** Enter the start time of the scheduled task.

Enter the interval after which to repeat the task:

- Interval Type From the drop down list, select the type of interval after which you want to repeat the task.
- **Interval** Enter the interval after which you want to repeat the task.
- **Optionset** Select to open the 1099 Optionset window.
- **Cancel** Select the button to close the window without saving the changes.
- 6. Select the Optionset button.
 - The 1099 Optionset window opens.
- Complete the fields on the 1099 Optionset window and select the Save button. The task is scheduled to run periodically based on the defined interval.

To Schedule a 1099 Misc. Task: Weekly

1. From the View Scheduled Tasks window, select the 'Schedule a New Task' button. The View Scheduled Task window opens.

Document	Diaries	Funds	Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => V	iew Sch	eduled 7	Tasks							
Schedule	a Tas	sk								
Task Type	:			1099-	MISC					
Task Name	e:			1099-	MISC					
Schedule T	Гуре:			Weekl	У					
Enter St	art Da	ite an	d Time:							
Date:				11/03/	2016					
Time:				05:00	PM					
Select the days you would like to Run the Task on:										
				🗌 Thu 🗹 Frid	sday dnesday irsday ay urday					
				Optio	nset	Can	cel			

- 2. From the Task Type drop down list, select the type of task as 1099-MISC.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Weekly.
- 5. Complete the fields on the Schedule a Task: Weekly window as shown below:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.		
Time	Enter the start time of the scheduled task.		
Select the days you would like to	Select the check box for a day of the week on which you want to run the scheduled task.		
Run the Task on	Note: You can select more than one day to run the scheduled task.		
Optionset	Select to open the1099 Optionset window.		
Cancel	Select the button to close the window without saving the changes.		

6. Select the Optionset button.

The 1099 Optionset window opens.

7. Complete the fields on the 1099 Optionset window and select the Save button.

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The task is scheduled to run weekly on the days selected.

To Schedule a 1099 Misc. Task: Monthly

1. From the View Scheduled Tasks window, select the 'Schedule a New Task' button.

Document Diaries	Funds	Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Sche	eduled 1	Fasks							
Schedule a Tas	k								
Task Type:			1099-	MISC					
Task Name:			1099-	MISC					
Schedule Type:			Month	ly					
Enter the start Month and other details:									
<u>Month:</u> Day of Month: Time:			July 2 05:00	► PM					
			Optio	nset	Can	cel			

- 2. From the Task Type drop down list, select the type of task as **1099-MISC**.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Monthly.
- 5. Complete the fields on the Schedule a Task: Monthly window as shown below:

Enter the start Month and other details:

Month	From the drop down list, select the month in which you want to schedule the task.
Day of Month	Enter the date on which you want to schedule the task in the selected month.
Time	Enter the start time of the scheduled task.
Optionset	Select to open the 1099 Optionset window.
Cancel	Select the button to close the window without saving the changes.

- Select the Optionset button. The 1099 Optionset window opens.
- 7. Complete the fields on the 1099 Optionset window and select the Save button. The task is scheduled to run monthly.

To Schedule a 1099 Misc. Task: Yearly

1. From the View Scheduled Tasks window, select the 'Schedule a New Task' button. The View Scheduled Task window opens.

Document Diaries Funds Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Scheduled Tasks							
Schedule a Task							
Task Type:	:	1099-M	ISC				
Task Name:	:	1099-M	ISC				
Schedule Type:		Yearly					
Enter Start Date and Time:							
	ſ						
Date:	l	11/03/2	016				
Time:	[05:00 PI	м	7			
				_			
Select the months you would l	ike to R	un the l	Task in	12			
		Janua Janua Febru					
		Marcl					
		April					
		□ May					
		June					
		🗆 Aug 🗹 Sep					
		Oct					
		Dec					
		Options	iet	Cance	el 🛛		

- 2. From the Task Type drop down list, select the type of task as **1099-MISC**.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Yearly.
- 5. Complete the fields on the Schedule a Task: Yearly window as shown below:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.		
Time	Enter the start time of the scheduled task.		
Select the months you would like to	Select the check box for the month in which you want to schedule the task to run.		
Run the Task in:	Note: You can select more than one month to schedule the task to run.		
Optionset	Select the button to open the 1099 Optionset window.		
Cancel	Select the button to close the window without saving the changes.		

- 6. Select the Optionset button.
 - The 1099 Optionset window opens.
- Complete the fields on the 1099 Optionset window and select the Save button. The task is scheduled to run yearly.

1099 Optionset window

To open From the View Scheduled Task window, select the Optionset button.

Document Diaries Funds Maintenance My Work Reports Search Security User Documents Utilities Help							
Utilities => View Scheduled Tasks			@ X				
Optionset Name *	Specify Date Range	Date From	Date To				
		MM/dd/yyyy	MM/dd/yyyy				
Tax Year to Export *	RollUp Payments on Export	Export Payees with Total Paid	Export Printed Payments Only				
2001							
Exclude Payments to Org Hierarchy	Export Payees based on 1099 Flag	Include EntityID into Payee File	Exclude Deleted Entities				
Export Payments without Claim Link	Exclude Payments to Claimants	Use Double Quotes	Ignore Tax ID Errors				
Export All Payments for Tax Year	Export Specific Transaction Types	Export Specific Reserve Types	Export Specific LOB				
Box 6 Medical Reserve Type	Box 13 Transaction Type	Box 14 Transaction Type					
•••	•••						
Payers to Export Data For *	Export Specific Bank Accounts	Bank Account Names					
OMAG Oklahoma Municipal Assurance Group		11111 •					

Optionset Name	Enter the name of the option set. The Option Name is required.
Tax Year to Export	Enter the tax year of the data you want to export.
Specify Date Range	Select the check box to limit the period of time included on the 1099. If you select the check box, From and To date fields are displayed. Enter the start and end dates for the time period for which you want to export 1099 data.
Payers to Export Data for	Select the Org Hierarchy button to open the Org. Hierarchy window and select department to export data for.
Export Specific Bank Accounts	Select the check box to export data associated with only the accounts that you select. When you select this option, you must also select the bank accounts that you want to include from the list box.

Export Printed Payments Only	Select the check box to export only printed payments for the given tax year. The payments are reported at the organizational level that you select. Otherwise, all payments are exported.
Export Payments without Claim link	Select the check box to export all payments. The payments are reported at the organizational level that you select. If you do not select the checkbox, payments not associated with a claim are not exported.
	Note: Processing multiple payees at once may produce inaccurate results.
Exclude Payments to Org Hierarchy	Select the check box to export payments made to departments contained in the RISKMASTER hierarchy that are not associated with a claim. The pay- ments are reported at the organizational level that you select. If you do not select the checkbox, payments not associated with a claim are not exported.
Exclude Payments to Claimants	Select the check box to export payments made to claimants.
Exclude Deleted Entities	Select the check box to exclude from the export payments made to payees who have been deleted from the database.
Exclude Payees based on 1099 Reportable Flag	Select the check box to export only payments made to payees, if the1099 Reportable check box is checked for the payee in RISKMASTER.
Include EntityID in Payee File	Select the check box to include the entity identification in the payee file.
Rollup Payments on Export	Select the check box to have all payments for an Entity rolled-up into one payment.
Export Payees with	This option is active only of you selected the Rollup Payments on Export
Total Paid =>	check box. Select this check box to export rolled-up payments made to payees only if the total payments are greater than or equal to the amount you enter.
	check box. Select this check box to export rolled-up payments made to payees only if the total payments are greater than or equal to the amount you
Total Paid =>	check box. Select this check box to export rolled-up payments made to payees only if the total payments are greater than or equal to the amount you enter. Select the check box to include exported data in double quotes instead of
Total Paid => Use Double Quotes Ignore Tax ID	 check box. Select this check box to export rolled-up payments made to payees only if the total payments are greater than or equal to the amount you enter. Select the check box to include exported data in double quotes instead of single quotes. Select the check box to ignore formatting errors in tax identification numbers. Before extracting, RISKMASTER validates the tax ID format, payer address,
Total Paid => Use Double Quotes Ignore Tax ID errors Export All Payments For Tax	 check box. Select this check box to export rolled-up payments made to payees only if the total payments are greater than or equal to the amount you enter. Select the check box to include exported data in double quotes instead of single quotes. Select the check box to ignore formatting errors in tax identification numbers. Before extracting, RISKMASTER validates the tax ID format, payer address, and payer city. You can choose to ignore these errors at your own risk. Select the option to export all payments that were made in RISKMASTER for the previously defined tax year and for claims that are linked to the
Total Paid => Use Double Quotes Ignore Tax ID errors Export All Payments For Tax Year Export Specific	 check box. Select this check box to export rolled-up payments made to payees only if the total payments are greater than or equal to the amount you enter. Select the check box to include exported data in double quotes instead of single quotes. Select the check box to ignore formatting errors in tax identification numbers. Before extracting, RISKMASTER validates the tax ID format, payer address, and payer city. You can choose to ignore these errors at your own risk. Select the option to export all payments that were made in RISKMASTER for the previously defined tax year and for claims that are linked to the departments under the chosen Payer in the organizational hierarchy. Select the option to export all payments that have the chosen transaction type codes that you select. Once you select this option, then you need to select
Total Paid => Use Double Quotes Ignore Tax ID errors Export All Payments For Tax Year Export Specific Transaction Types Export Specific	 check box. Select this check box to export rolled-up payments made to payees only if the total payments are greater than or equal to the amount you enter. Select the check box to include exported data in double quotes instead of single quotes. Select the check box to ignore formatting errors in tax identification numbers. Before extracting, RISKMASTER validates the tax ID format, payer address, and payer city. You can choose to ignore these errors at your own risk. Select the option to export all payments that were made in RISKMASTER for the previously defined tax year and for claims that are linked to the departments under the chosen Payer in the organizational hierarchy. Select the option to export all payments that have the chosen transaction type codes that you select. Once you select this option, then you need to select the transaction types that you want to include.

Box 13 Transaction Type	Select the search button to open the codes list and select the transaction types to include in Box 13 (Excess Golden Parachute Payments) on the 1099 MISC form.
Box 14 Transaction Type	Select the search button to open the codes list and select the transaction types to include in Box 14 (Gross Proceeds paid to an attorney) on the 1099 MISC form.
Save	Select the button to save the changes.
Cancel	Select the button to close the window without saving the changes.

Scheduling ISO Claim Search Tasks

To Schedule an ISO Task: One Time

- 1. From the main menu, select Utilities. The Utilities menu opens.
- 2. From the Utilities menu, choose Tools & Designers. The Tools & Designers menu opens.
- From the Tools & Designers menu, choose Task Manager. The Task Manager menu opens.
- 4. From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.
- 5. From the View Scheduled Tasks window, select the Schedule a New Task button.

3			
uments Utiliti	es Help		
	Jurisdictional Options Managers System Parameters		
ate of C	Technicians 🕨	Claim Type	Claim Status
10/01/2	Tools and Designers	Adjuster Transfer	Open
09/01/2010	UI Admins	Auto Diary Setup Auto Mail Merge Setup	Open
10/01/2016		Diary Utilities	Open
10/26/2015	PqrTest, MnoATest	History Tracking	Open
10/30/2015	Pqr, Mno	MCM PreFill Folder Utility	Open
10/06/2015	Pqr, Mno	Query Designer Script Editor	Open
1/05/2011	ANDERSON, ROBER	Task Manager	TM Jobs View
1/05/2011	ANDERSON, ROBER	2	View Scheduled Tasks
1/02/2016	Smith, John	Checkers	Open

- 6. From the Task Type drop down list, select the type of task as ISO.
- 7. In the Task Name field, enter the name of the task.
- 8. From the Schedule Type drop down list, select the type of schedule as One Time.
- 9. Complete the fields on the Schedule a Task: One Time window as shown below:

Enter the Date and Time you would like to Run the Task on:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Optionset	Select the button to open the ISO Optionset window.
Cancel	Select the button to close the window without saving the changes.

10. Select the Optionset button.

The ISO Optionset window opens.

11. Complete the fields on the ISO Optionset window and select the Save Settings button. The task is scheduled to run one time.

CSC RISKM	ASTER Ac	celerator	
RISKMASTER			
~	Document Diaries Funds	Maintenance My Work Reports Search Security User Document	ts Utilities Help
Diaries	Utilities => View Scheduled T	asks	
Utilities View Scheduled Tasks	Task Type:	Process WPA Diaries	
	Task Name:	Financial History Processing Billing Scheduler	
	Sub Task Name:	BES Scheduler History Tracking	
	Schedule Type	Print Batch FRÖI ACORD Process Overdue Diaries Policy System Update Print Check Batch	
		Claim Balancing Fraud Analytics Scheduler Auto Mail Merge	
		MBR DDS	
		ISO	
		DIS MMSEA Reserve Balance	
		PositivePay 1099-MISC	
		PSO Currency Exchange Interface Print Batch EOB	

Document	Diaries	Funds	Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities =>	View Sch	eduled 7	Tasks							
Schedul	e a Tas	k								
Task Type	e:			ISO						
Task Nam	ne:			ISO						
SubTask	Name:			None						
Schedule	Туре:			OneTi	me					
Enter t	he Date	e and `	Time you v	vould lik	te to Ru	in the T	Fask on	:		
Date:				11/03/	2016					
Time:				05:30	PM					
				Optio	nset	Can	cel			

To Schedule an ISO Task: Periodically

1. From the View Scheduled Tasks window, select the 'Schedule a New Task' button. The View Scheduled Task window opens.

Document Diaries	Funds	Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Sch	neduled	Tasks							
Schedule a Tas	sk								
Task Type:			ISO						
Task Name:			150						
SubTask Name:			None						
Schedule Type:			Period	lically					
Enter the star	t Date	e and Time:							
Date :			11/03/	2016					
Time :			05:30	PM					
Enter the inte	wal a	ftor which	to ropos	t the tr	ock-				
Enter the inte	a vai a	iter winch	to repea		ISK.				
Interval Type :			Weeks	· •					
Interval :			3						
			Optio	nset	Can	cel			

- 2. From the Task Type drop down list, select the type of task as ISO.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as 'Periodically'.
- 5. Complete the fields on the Schedule a Task: Periodically as shown below:

Enter Start Date and Time:

Date Enter the start date of the scheduled task or select the date from the calendar.

Time Enter the start time of the scheduled task.

Enter the interval after which to repeat the task:

- Interval Type From the drop down list, select the type of interval after which you want to repeat the task.
- Interval Enter the interval after which you want to repeat the task.
- **Optionset** Select the button to open the ISO Optionset window.
- **Cancel** Select the button to close the window without saving the changes.
- 6. Select the Optionset button.
 - The ISO Optionset window opens.
- 7. Complete the fields on the ISO Optionset window and select the Save Settings button. The task is scheduled to run periodically based on the defined interval.

To Schedule an ISO Task: Weekly

1. From the View Scheduled Tasks window, select the 'Schedule a New Task' button. The View Scheduled Task window opens.

Document Diaries Funds	Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Scheduled								
Schedule a Task								
Task Type:		ISO						
Task Name:		ISO						
Schedule Type:		Week	y					
Enter Start Date an	d Time:							
Date:		11/03/	2016					
Date.		11/03/	2010		1.000			
Time:		05:30	PM					
Select the days you	would like	to Run	the Tas	sk on:				
		Mor	nday					
		🗹 Tue						
		We	dnesday					
			irsday					
		Frid	lay urday					
		Optio	nset	Can	cel			

- 2. From the Task Type drop down list, select the type of task as ISO.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Weekly.
- 5. Complete the fields on the Schedule a Task: Weekly window:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Select the days you would like to Run the Task on	Select the check box for a day of the week on which you want to run the scheduled task.
Optionset	<u>Note:</u> You can select more than one day to run the scheduled task. Select the button to open the ISO Optionset window.
Cancel	Select the button to close the window without saving the changes.

6. Select the Optionset button.

The ISO Optionset window opens.

7. Complete the fields on the ISO Optionset window and select the Save Settings button. The task is scheduled to run weekly on the days selected.

To Schedule an ISO Task: Monthly

1. From the View Scheduled Tasks window, select the 'Schedule a New Task' button.

My Work Reports Search Security User Documents Utilities Help
ISO
ISO
Monthly
r details:
June 🗸
2
05:30 PM
05:30 PM
Optionset Cancel

- 2. From the Task Type drop down list, select the type of task as ISO.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Monthly.
- 5. Complete the fields on the Schedule a Task: Monthly window as shown below:

Enter the start Month and other details:

Month	From the drop down list, select the month in which you want to schedule the task.
Day of Month	Enter the date on which you want to schedule the task in the selected month.
Time	Enter the start time of the scheduled task.
Optionset	Select to open the ISO Optionset window.
Cancel	Select the button to close the window without saving the changes.

- Select the Optionset button.
 The ISO Optionset window opens.
- 7. Complete the fields on the ISO Optionset window and select the Save Settings button. The task is scheduled to run monthly.

To Schedule an ISO Task: Yearly

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

unds	Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
uled T	Tasks							
		1	150					
			Yearly					
e and	l Time:							
		[11/03/2	016				
		[07:00 P	М				
hs y	ou would l	ike to R	un the	Task in	1:			
			Febru Marc April April May June July Aug Sep Oct Nov Dec	Jary h				
	anc	uled Tasks	uled Tasks : and Time:	ISO ISO Yearly and Time: 11/03/2 07:00 P hs you would like to Run the Janua Febru Marci April May July Zaug Sep Oct Nov Dec	ISO ISO Yearly and Time: 11/03/2016 07:00 PM hs you would like to Run the Task in January February March April May June July Aug Sep Oct Nov	ISO ISO Yearly and Time: 11/03/2016 07:00 PM hs you would like to Run the Task in: Danuary February March April May June June June June June Dune Dune Dune Dune	ISO ISO Yearly and Time: 11/03/2016 07:00 PM hs you would like to Run the Task in: Danuary February March April July May July May Dune July Aug Sep Oct Nov Dec	ISO ISO Yearly and Time: 11/03/2016 07:00 PM bs you would like to Run the Task in: hs you would like to Run the Task in: Danuary February March April July May July May Dune July May Dune July May Dune Dune Dune Dune

- 2. From the Task Type drop down list, select the type of task as ISO.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Yearly.
- 5. Complete the fields on the Schedule a Task: Yearly as shown below:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Select the months you would like to Run the Task in:	Select the check box for the month in which you want to schedule the task to run. <u>Note:</u> You can select more than one month to schedule the task to run.
Optionset	Select the button to open the ISO Optionset window.
Cancel	Select the button to close the window without saving the changes.

6. Select the Optionset button.

The ISO Optionset window opens.

7. Complete the fields on the ISO Optionset window and select the Save Settings button. The task is scheduled to run yearly.

ISO Optionset window

To open from the View Scheduled Task window, select the Optionset button.

ISO Export Settings

ISO Optionset								
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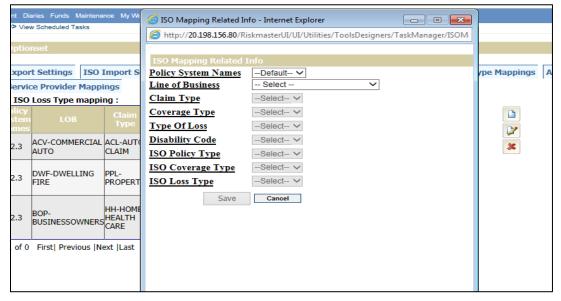
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Enhanced Notes Settings	
Create Enhanced Notes for Claim Match Reports	Create Enhanced Notes for Submission Rejections
Claim Match Enhanced Notes Type	Submission Rejection Enhanced Notes Type
Select V	Select V
Claim Match Report Enhanced Notes Text	Submission Rejection Enhanced Notes Text
Save Settings	Cancel

ISO Loss Type Mappings

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0	PIJ2.3	Bop- Businessowner	HH-HOME SHEALTH CARE	301-Building Replacement Cost Including Liability	BOD02-	INA	ALLIED/OTHER (Commercial Property)	NOT APPLICABLE	BURGLARY	' UP01		
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Creating new ISO Loss Type Mapping



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• Modify Existing ISO Loss Type Mapping

Claimant Type Mappings

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ISO Property Type Mappings

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• Adding new ISO Property Type Mapping

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• Modify existing ISO Property Type Mapping

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Additional Claimant Type

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• Adding new additional claimant type

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Select Additional Claimant Type mA R F-Family - Individual Name		

• Modify existing additional claimant type

	🔗 ISO Claim Party Type Mapping with rmA MMSEA Claim Party Type 🕞 💷 💌	<u> </u>	
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ISO Service Provider Mapping

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• Modify existing ISO Service Provider Mapping

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NA-Not Applicable				
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ISO Export Settings Tab

Optionset Name	Enter the name of the option set. The Option Name is required.
Report Preparation:	
ISO Assigned Customer Code	Enter the 9 character customer code assigned by ISO.
Preparing Company Name	Enter the name of the company preparing the report.
Use Default Insured Name	Select the check box to use the default insured.
Address	Enter the address, city and state of the default insured.
Select Reporting Action:	
Initial Reporting	Select the check box if you want initial reporting.
Supplemental Reporting (Replacement)	Select the check box if you want the supplemental reporting.
Claim Status Criteria:	
Open Claims	Select the check box to include claims with an open status.
Closed Claims	Select the check box to include claims with closed status.
To Report Loss or Injuries:	For each Line of Business, select a value from the drop down list to report as the Alleged Injuries Property Damage value. Values are Event Description, Injury Description and Not Applicable. The value for the Event Description is pulled from the Event Description field on the Event Detail window. For WC Claims, when the Person Involved Disability Type is Injuries, the Event Description is pulled from the list of Injuries for the Person Involved. When the Person Involved Disability Type is Illness, the Event Description is pulled from the Illness Type. If an Illness or Injury is not found for the Person Involved, then the Event Description is pulled from the list of Diagnosis Codes. For General Claims, the injury description is picked from the Claimant's Injury Description.
Would Like To Process Single Claim Only	Select the check box if you want to process only a single claim and enter the claim number.
To Report Policy Number:	
Substitute Claim Number for Policy	Select the check box to substitute the claim number for policy number.
Claim Criteria:	
Use Date of Claim Range	Select the check box to use the claim range date and select the From and To dates.
Line Of Business Criteria	Select the check box corresponding to the Line of Business (General Claims, Vehicle Accident Claims, Workers' Compensation Claims, Health Claims and Property Claims) and then select the claim type you want to include in export process. <u>Note:</u> To select multiple claim type, select the Ctrl key from the keyboard.

Exclude States	Select the check box and then select the jurisdictions to exclude the claim from the export process. <u>Note:</u> To select multiple jurisdictions, select the Ctrl key from the keyboard.
Include States	Select the check box and then select the jurisdictions to include on the claim in the export process.
	<u>Note</u>: To select multiple jurisdictions, select the Ctrl key from the keyboard.
Eligible for ISO Submission	Select the check box to include only those claims which are selected as Submit to ISO on the RISKMASTER ISO screen. All claims are processed when the check box is not selected.
Report to CMS	Select the check box to indicate to ISO CMS reporting is required. Option available with rmA 13.1 chp4 and later.
Search NHTSA for Recalls	Select the check box to indicate to ISO the searching the NHTSA system for recalls is required. Option available with rmA 13.1 chp4 and later.
Include NMVTIS	Select the checkbox to include NMVTIS(National Motor Vehicle Title Information System).
NMVTIS Reporting ID	MNVTIS Reporting ID will identify each insurer for reporting.
Search Party in CSLN/OCSE database indicator	 Select a value from the drop down list to indicate to ISO searching the CSLN/OCSE database is required. Values are: Y = Search party in Child Support Lien Network database
	 O = Search party in Office of Child Support Enforcement database
	• B = Search party in both CSLN and OCSE databases.
	Option available with rmA 13.1 chp4 and later.
Save Settings	Select to Save the changes.
Cancel	Select to close the window without saving the changes.
ISO Import Settings Tab	
Optionset Name	Enter the name of the option set. The Option Name is required.
File Location	
ISO Claim Match Report	Select the checkbox to import ISO Claim Match Reports. Selecting the checkbox enables the Claim Match Report browse button. Select the Browse button to search for the Claim Match Report to be import.
ISO Submission Rejection Report	Select the checkbox to process ISO Submission Rejection Reports. Selecting the checkbox enables the Submission Rejection Report Browse button. Select the Browse button to search for the Submission Rejection Report to process.

Claim Match Report Document Type	Select a value from the drop down list for setting the Document Type for the imported Claim Match Reports. The field is enabled when the ISO Claim Match Report option is selected.
Claim Match Report Document Text	Enter a description for setting the Document Text for the imported Claim Match Reports. The field is enabled when the ISO Claim Match Report option is selected.
Diary Settings	
Create Diary for Claim Match Reports	Select the checkbox to send a diary when importing Claim Match Reports The field is enabled when the ISO Claim Match Report option is selected.
Adjuster	Select this radio button to send a diary to the Adjuster when importing Claim Match Reports. The field is enabled when the Create Diary for Claim Match Reports option is selected.
Other User(s)	Select this radio button to send a diary to Other User(s) when importing Claim Match Reports. Select the Magnifying Glass button to search for users. The field is enabled when the Create Diary for Claim Match Reports option is selected.
Claim Match Report Diary Type	Select a value from the drop down list for setting the Diary Type on the Diary created for the imported Claim Match Reports. The field is enabled when the Create Diary for Claim Match Reports option is selected.
Claim Match Report Diary Text	Enter a description for setting the Diary Text on the Diary created for the imported Claim Match Reports. The field is enabled when the Create Diary for Claim Match Reports option is selected.
Create Diary for Submission Rejections	Select the checkbox to send a diary when processing Submission Rejections. The field is enabled when the ISO Submission Rejection Report option is selected.
Adjuster	Select the radio button to send a diary to the Adjuster when processing Submission Rejections. The field is enabled when the Create Diary for Submission Rejections option is selected.
Other User(s)	Select the radio button to send a diary to Other User(s) when processing Submission Rejections. Select the Magnifying Glass button to search for users. The field is enabled when the Create Diary for Submission Rejections option is selected.
Submission Rejection Diary Type	Select a value from the drop down list for setting the Diary Type on the Diary created for processing the Submission Rejections. The field is enabled when the Create Diary for Submission Rejections option is selected.
Submission Rejection Diary Text	Enter a description for setting the Diary Text on the Diary created for the processing the Submission Rejections. The

Enhanced Notes Settings:

Create Enhanced Notes for Claim Match Reports	Select the checkbox to create an Enhanced Note when importing Claim Match Reports. The field is enabled when the ISO Claim Match Report option is selected.
Claim Match Enhanced Notes Type	Select a value from the drop down list for setting the Enhanced Notes Type on the Enhanced Note created for the imported Claim Match Reports. The field is enabled when the Create Enhanced Notes for Claim Match Reports option is selected.
Claim Match Report Enhanced Notes Text	Enter a description for setting the Enhanced Notes Text on the Enhanced Notes created for the imported Claim Match Reports. The field is enabled when the Create Enhanced Notes for Claim Match Reports option is selected.
Create Enhanced Notes for Submission Rejections	Select the checkbox to create an Enhanced Note when processing Submission Rejections. The field is enabled when the ISO Submission Rejection Report option is selected.
Submission Rejection Enhanced Notes Type	Select a value from the drop down list for setting the Enhanced Notes Type on the Enhanced Note created when processing Submission Rejections. The field is enabled when the Create Enhanced Notes for Submission Rejections option is selected.
Submission Rejection Enhanced Notes Text	Enter a description for setting the Enhanced Notes Text on the Enhanced Notes created when processing Submission Rejections. The field is enabled when the Create Enhanced Notes for Submission Rejections option is selected.
Save Settings	Select to save the changes.
Cancel	Select to close the window without saving the changes.

ISO Loss Type Mapping Tab

Create New ISO Loss Type Mapping

New button	Select the New button to create a new ISO Loss Type mapping. The ISO Mapping Related Info window displays.
Line Of Business	Select a value from the drop down list. Values are General Claims, Vehicle Accident Claims, Workers' Compensation, Property Claims and Health Claims.
Claim Type	Select a claim type from the drop down list based on the Line of Business selected. The Claim Type field is enabled only after a Line of Business value is selected.
Coverage Type	Select a coverage type from the drop down list based on the Claim Type selected. The Coverage Type field is enabled only after a Claim Type value is selected. Also this option is enabled only when Carrier Claim Setting is turned ON.

Type of Loss	Select a loss type from the drop down list based on the Coverage Type selected. The Type of Loss field is enabled only after a Coverage Type value is selected. The Type of Loss field is enabled for Lines of Business other than Workers' Compensation. The Type of Loss field is enabled only when Carrier Claim Setting is turned ON.
Disability Code	Select a disability code from the drop down list based on the Coverage Type selected. The Disability field is enabled only after a Coverage Type value is selected. The Disability Code field is enabled for the Workers' Compensation Line of Business. The Disability Code field is enabled only when Carrier Claim Setting is turned ON.
ISO Policy Type	Select a policy type from the drop down list. The drop down list is populated with values defined by ISO.
ISO Coverage Type	Select a coverage type from the drop down list based on the ISO Policy Type selected. The ISO Coverage Type field is enabled only after an ISO Policy Type is selected. The drop down list is populated with values defined by ISO.
ISO Loss Type	Select a Loss Type from the drop down list based on the ISO Coverage Type selected. The ISO Loss Type field is enabled only after an ISO Coverage Type is selected. The drop down list is populated with values defined by ISO.
Save	Select to save the changes. The ISO Mapping Related Info window closes and the mappings defined would be displayed in the ISO Loss Type mapping grid.
Cancel	Select to close the window without saving the changes.

Modify Existing ISO Loss Type Mapping

Edit button	Select the radio button next to the ISO Loss Type Mapping to be modified and select the Edit button. The ISO Mapping Related Info window displays.
ISO Policy Type	Select a value from the drop down list to modify the existing ISO Policy Type.
ISO Coverage Type	Select a value from the drop down list to modify the existing ISO Coverage Type.
ISO Loss Type	Select a value from the drop down list to modify the existing ISO Loss Type.
Save	Select to save the changes. The ISO Mapping Related Info window closes.
Cancel	Select to close the window without saving the changes.

Delete Existing ISO Loss Type Mapping

Delete button Select the radio button next to the ISO Loss Type Mapping to be deleted and select the Delete button. The ISO Loss Type Mapping screen is refreshed and the mapping is deleted.

Claimant Type Mappings Tab

Claimant Type Displays the type of claimant.

Current Setting:	Displays the current claimant type mapping of the Claimant Type selected in the Claimant Type window.
Modify Settings:	 Use the UnMapped option, if you want the mapping type for the claimant as Unmapped. Use the Business option, if you want the mapping type for the claimant as Business. Use the Individual option, if you want the mapping type for the claimant as Individual.
Save	Select to save the changes.
Cancel	Select to close the window without saving the changes.

ISO Property Type Mappings Tab

ISO Property Type Mappings Tab available with rmA 14.1 and later

Select ISO Property Type mapping:

New button	Select the New button to create a new ISO Property Type mapping. The ISO Property Type Mapping window opens.
rmA Property Type	Select a value from the drop down list. The values are populated as per the data present in the PROPERTY_TYPE code table in Riskmaster.
ISO Property Type	Select an ISO Property type value from the drop down list that you want to map against the selected rmA property type. The values in the drop down list are defined by ISO. Values are: C-Commercial D-Dwelling I-Industrial M-Multi-Dwelling O-Other
Save	Select to save the changes. The ISO Property Type Mapping window closes and the mappings defined display on the ISO Property Type mapping grid. Note: If you create a mapping for an existing rmA Property Type then an error message will display when saved: "Mapping for this rmA Property type already exists!"
Cancel	Select to close the window without saving the changes.
Modify Existing ISC	Property Type Mapping
Edit button	Select the radio button next to an existing ISO Property Type Mapping to be modified and select the Edit button. The ISO Property Type Mapping window opens.
rmA Property Type	This value is disabled and cannot be changed.

ISO Property Type	Select a value from the drop down list to modify the existing Property mappings.
Save	Select to save the changes. The ISO Property Type Mapping window closes and the modified mapping is displayed on the Property Type mapping grid.
Cancel	Select to close the window without saving the changes.

Delete Existing ISO Property Type Mapping

Delete button Select the radio button next to the ISO Property Type Mapping to be deleted and select the Delete button. The ISO Property Type Mapping screen is refreshed and the mapping is deleted.

Additional Claimant Type Tab

Additional Claimant Type Tab available with rmA 14.1 and later

Select Additional Claimant Type mapping:

New button	Select the New button to create a new Additional Claimant Type mapping. The screen that defines mapping for ISO Role in the claim for beneficiary of a deceased claimant (CMS Reporting only) opens.
rmA Claim Party Type	Select a value from the drop down list. The values are populated as per the data present in MMSEA_CLMPRTY_CODE code table in Riskmaster.
ISO Claim Party Type	Select an ISO Claim Party Type value from the drop down list that you want to map against the selected rmA Claim Party Type. The values in the drop down list are defined by ISO. The values are: ES-Estate FA-Family OC-Other Claimant
Save	Select to save the changes. The Additional Claimant Mapping window closes and the mappings defined display on the ISO Additional Claimant Type mapping grid. Note: If you create a mapping for an existing rmA Additional Claimant Type (rmA Claim Party Type) then an error message will display when saved: "Mapping for this rmA Additional Claimant type already exists!"
Cancel	Select to close the window without saving the changes.
Modify Existing ISC	Additional Claimant Type Mapping
Edit button	Select the radio button next to an existing ISO Additional Claimant Type Mapping to be modified and select the Edit button. The screen that defines mapping for ISO Role in the claim for beneficiary of a deceased claimant (CMS Reporting only) opens.
rmA Claim Party Type	This value is disabled and cannot be changed.
ISO Claim Party Type	Select a value from the drop down list to modify the existing Additional Claimant mappings.

Save	Select to save the changes. The Additional Claimant Type Mapping window
	closes and the modified mapping is displayed on the Additional Claimant Type mapping grid.

Cancel Select to close the window without saving the changes.

Delete Existing ISO Additional Claimant Type Mapping

Delete button Select the radio button next to the ISO Additional Claimant Type Mapping to be deleted and select the Delete button. The ISO Additional Claimant Type Mapping screen is refreshed and the mapping is deleted.

ISO Service Provider Mappings Tab

ISO Service Provider Mappings Tab available with rmA 14.1 and later

Select ISO Service Provider Role mapping:

New button	Select the New button to create a new ISO Service Provider mapping. The ISO Service Provider mapping window opens.
MMSEA Claimant Representative Type	Select a value from the drop down list. The values are populated as per the data present in MMSEA_CLPYREP_CODE code table in Riskmaster.
ISO Service Provider Type	Select an ISO Service Provider Type value from the drop down list that you want to map against the selected MMSEA Claimant Representative Type. The values populated in the drop down list are defined by ISO. The values are: LS-Lawyer for CMS Claimant GU-Guardian OR-Other Representative PW-Power of Attorney
Save	Select to save the changes. The ISO Service Provider Mapping window closes and the mappings defined display on the ISO Service Provider mapping grid.
Cancel	Select to close the window without saving the changes.
Modify Existing ISC) Service Provider Mapping
Edit button	Select the radio button next to an existing ISO Service Provider Mapping to be modified and select the Edit button. The ISO Service Provider mapping window opens.
MMSEA Claimant Representative Type	This value is disabled and cannot be changed.
ISO Service Provider Type	Select a value from the drop down list to modify the existing Service Provider mappings.
Save	Select to save the changes. The Service Provider Mapping window closes and the modified mapping is displayed on the ISO Service Provider mapping grid.

Cancel Select to close the window without saving the changes.

Delete Existing ISO Service Provider Mapping

Delete button Select the radio button next to the ISO Service Provider Mapping to be deleted and select the Delete button. The ISO Service Provider Mapping screen is refreshed and the mapping is deleted.

Scheduling DIS Tasks

To Schedule a DIS Task: One Time

- 1. From the main menu, select Utilities. The Utilities menu opens.
- From the Utilities menu, choose Tools & Designers. The Tools & Designers menu opens.
- From the Tools & Designers menu, choose Task Manager. The Task Manager menu opens.
- 4. From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.
- 5. From the View Scheduled Tasks window, select the 'Schedule a New Task' button.

	Task Name	Schedule Type	Next Run Date/Time	x
)	DIS	OneTime	10/26/2016 12:34 PM	00
D	DIS	OneTime	10/26/2016 12:34 PM	
D	DIS_hmip	OneTime	10/28/2016 12:34 PM	
С	MMSEA	OneTime	10/07/2020 11:11 AM	
0	PositivePay	OneTime	10/31/2016 9:45 PM	

6. From the Task Type drop down list, select the type of task as DIS.

Document Diaries Fund	s Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Schedule	l Tasks							
Schedule a Task								
Tack Type:		DIS						
Task Type:		015						
Task Name:		DIS						
SubTask Name:		None						
Schedule Type:		OneTir	ne					
Enter the Date and	Enter the Date and Time you would like to Run the Task on:							
Date:		10/13/	/2016		H			
Time:		04:42	PM					
		Opti	onset	C	ancel			

- 7. In the Task Name field, enter the name of the task.
- 8. From the Schedule Type drop down list, select the type of schedule as OneTime.
- 9. Complete the fields on the Schedule a Task: One Time as shown below:

Enter the Date and Time you would like to Run the Task on:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Optionset	Select the button to open the DIS Optionset window.
Cancel	Select the button to close the window without saving the

10. Select the Optionset button.

The DIS Optionset window opens.

11. Complete the fields on the DIS Optionset window and select the Save button. The task is scheduled to run once.

changes.

To Schedule a DIS Task: Periodically

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Document Diaries Funds Maintenance My	Work Reports Sear	ch Security	User Documents	Utilities	Help		
Utilities => View Scheduled Tasks							
Schedule a Task							
Task Type:	DIS						
Task Name:	DIS						
SubTask Name:	None						
Schedule Type:	Periodically						
Enter the start Date and Time:							
Data :	10/12/2016						
Date :	10/13/2016	a					
Time :	04:53 PM						
Enter the interval after which to r	epeat the task:						
Internal Trans.							
Interval Type :	Weeks 💙						
Interval :	2						
	Optionset	Cancel]				

- 2. From the Task Type drop down list, select the type of task as DIS.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Periodically.
- 5. Complete the fields on the Schedule a Task: Periodically window as shown below:

Enter Start Date and Time:

Date Enter the start date of the scheduled task or select the date from the calendar.

Time Enter the start time of the scheduled task.

Enter the interval after which to repeat the task:

- Interval Type
 From the drop down list, select the type of interval after which you want to repeat the task.
- Interval Enter the interval after which you want to repeat the task.
- Optionset Select the button to open the DIS Optionset window.
- **Cancel** Select the button to close the window without saving the changes.
- 6. Select the Optionset button.

The DIS Optionset window opens.

7. Complete the fields on the DIS Optionset window and select the Save button. The task is scheduled to run periodically based on the defined interval.

To Schedule a DIS Task: Weekly

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Document Diaries	Funds	Maintenance	My Work	Reports	Search	Security	Us er Documents	Utilities	Help
Utilities => View Sch	neduled "	Tasks							
Schedule a Tas	k								
Task Type:			DI	S					
Task Name:			DI	S					
Schedule Type:			w	eekly					
Enter Start Da	ate and	d Time:							
Date:			10)/13/201	6		#		
Time:				4:57 PM			_		
Select the day	/s vou	would like t	to Run t	be Task	con:				
	- j ou								
] Monday	/				
			~] Tuesda	у				
				Wedne	sday				
] Thursd	ау				
				Friday					
				Saturda					
			L] Sunday	1				
				Options	et	Cance	4		

- 2. From the Task Type drop down list, select the type of task as DIS.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Weekly.
- 5. Complete the fields on the Schedule a Task: Weekly as shown below:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Select the days you would like to	Select the check box for a day of the week on which you want to run the scheduled task.
Run the Task on	Note: You can select more than one day to run the scheduled task.
Optionset	Select the button to open the DIS Optionset window.
Cancel	Select the button to close the window without saving the changes.

- 6. Select the Optionset button.
 - The DIS Optionset window opens.
- Complete the fields on the DIS Optionset window and select the Save button. The task is scheduled to run weekly on the selected days.

To Schedule a DIS Task: Monthly

1. From the View Scheduled Tasks window, select the 'Schedule a New Task' button. The View Scheduled Task window opens.

Document Diaries Funds Maintenau	nce My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Scheduled Tasks							
Schedule a Task							
Task Type:	DIS						
Task Name:	DIS						
Schedule Type:	Mont	nly					
Enter the start Month and o	ther detai	s:					
Month:	Nover	nber 🗸	1				
Day of Month:	20						
			-				
Time:	04:45	PM					
	Opt	onset	С	ancel			

- 2. From the Task Type drop down list, select the type as DIS.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select Monthly.
- 5. Complete the fields on the Schedule a Task: Monthly window as shown below:

Enter the start Month and other details:

Month	From the drop down list, select the month in which you want to schedule the task.
Day of Month	Enter the date on which you want to schedule the task in the selected month.
Time	Enter the start time of the scheduled task.
Optionset	Select to open the DIS Optionset window.
Cancel	Select the button to close the window without saving the changes.

6. Select the Optionset button.

The DIS Optionset window opens.

7. Complete the fields on the DIS Optionset window and select the Save button. The task is scheduled to run monthly.

To Schedule a DIS Task: Yearly

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Document Diaries Funds Maintenance My Work Repo	orts Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks	
Schedule a Task	
Task Type:	DIS
Task Name:	DIS
Schedule Type:	Yearly
Enter Start Date and Time:	
Date :	10/13/2016
Time:	05:06 PM
<u></u>	03.00 PM
Select the months you would like to Run th	e Taskin:
	January
	✓ February
	March
	☑ May
	July
	☑ Sep
	✓ Nov
	✓ Dec
	Optionset Cancel

- 2. From the Task Type drop down list, select the type of task as DIS.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Yearly.
- 5. Complete the fields on the Schedule a Task: Yearly window as shown below:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Select the months you would like to Run the Task in:	Select the check box for the month in which you want to schedule the task to run. Note: You can select more than one month to schedule the task to run.
Optionset	Select the button to open the DIS Optionset window.
Cancel	Select the button to close the window without saving the changes.

- 6. Select the Optionset button.
 - The DIS Optionset window opens.
- 7. Complete the fields on the DIS Optionset window and select the Save button.

The task is scheduled to run yearly.

DIS Optionset window

To open the DIS Optionset window from the View Scheduled Task window, select the Optionset button.

Optionset Name	Enter the name of the option set. The Option Name is required.
Do you wish to Verify the data before it is imported	Select the check box if you want to verify data before it is imported. For further details you can refer DA DIS User Verification User Guide
Select Heavy Access Database to Import From	Select the check box if the file to import is very large. For further details you can refer DA DIS Heavy Access Database User Guide
Select Access Database to Import From	Enter the file location or select the Browse button to navigate to the file.
To import supplemental data, please refer DIS DB Tool user guide doc and DIS XML Tool kit user guide. If already done the set up for supplemental tables then proceed further.	Data Analytics DIS DB Tools User Guide DIS XML User Guide

Select the areas you wish to Import

Employees	Select the option if you want to import the employee data.

	e My Work Policy Reports Search Security User Documents Utilities Help			
Utilities => View Scheduled Tasks				
DIS Optionset				
Optionset Name test21				
Verify the data before import				
Select Heavy Access Database	to Import From			
Select Access Database to Im	port From: C:\Document and setting: Browse			
Select the areas you wish to I	mport			
Employees Organization Hie	rarchy O Funds O Funds Deposit O Vehides O Entities O Policies			
○ Reserves ○ Organization Exp	cosure O Patients O Physicians O Medical Staff O Administrative Tracking			
Employees				
Import Supplemental Data				
Update Even if Blank or Zero				
Allow Creation of New Codes				
Update Address Even if Blank o	yr Zero			
Match Only on Employee ID				
Match by Entity ID				
Organization Hierarchy Funds				
rand5				
 Import Supplemental Data 	Select the check box if you want to import employee supplemental data.			
 Update Even if Blank or Zero 	Select the check box if you want to import fields even when their value is either blank or zero.			
 Allow Creation of New Codes 	Select the check box if you want to create new codes if they do not exist in RISKMASTER X.			
 Update Address Even if Blank or Zero 	Select the check box if you want to import address fields even when their value is either blank or zero.			
 Match Only on Employee ID 	Select the check box if you want to search for employee records using the employee Identification number.			
 Match by Entity ID 	Select the check box if you want to search for employee records using the entity Identification number.			
Organizational Hierarchy	Select the option if you want to import the Organizational			

Drganizational Hierarchy	Select the option if you want to import the Organizational Hierarchy data.
--------------------------	--

Document Diaries Funds Maintenar	nce My Work Policy Reports Search Security User Documents Utilities Help			
Utilities => View Scheduled Tasks				
DIS Optionset				
Optionset Name test21				
Verify the data before import				
Select Heavy Access Database	e to Import From			
Select Access Database to In	mport From: C:\Document and setting: Browse			
Select the areas you wish to	Import			
○ Employees Organization Hi	ierarchy 🔿 Funds 🔿 Funds Deposit 🔿 Vehicles 🔹 🔿 Entities 🔅 Policies			
○ Reserves ○ Organization Exposure ○ Patients ○ Physicians ○ Medical Staff ○ Administrative Tracking				
Employees				
Organization Hierarchy				
Import Supplemental Data				
Update Even if Blank or Zero				
Allow Creation of New Codes				
Import	Select the check box if you want to import Organizational Hierarchy			
Supplemental Data	supplemental data.			
 Update Even if 	Select the check box if you want to import fields even when the value in			
Blank or Zero	them is either blank or zero.			
- Allow Creation of	Coloct the check box if you want to allow your to proote new codes in			
 Allow Creation of New Codes 	Select the check box if you want to allow user to create new codes in RISKMASTER X.			
new Codes				

Funds	Select the option if you want to import funds data.			
Document Diaries Funds Maintenance MyWork Policy Reports Search Security UserDocuments Utilities Help				
Utilities => View Scheduled Tasks				
DIS Optionset				
Optionset Name test21				
Verify the data before import				
Select Heavy Access Database	to Import From			
Select Access Database to Im	port From: C:\Document and setting: Browse			
Select the areas you wish to I	inport			
○ Employees ○ Organization Hie	erarchy Funds			
○ Reserves ○ Organization Ex	posure O Patients O Physicians O Medical Staff O Administrative Tracking			
Employee <i>s</i>				
Organization Hierarchy				
Funds				
Import Supplemental Data				
Allow Creation of New Codes				
Import Funds for Open Claims	Only			
Check Duplicate Payments	Check Duplicate Payments			
Accept Duplicate Check Numbers				
Import Cleared Payments too				
Match Payee by Name				
Match Payee by Tax ID				
Match Payee by DOB				
Match by Entity ID				
Import Multiple Payees				

 Impo Data 	ort Supplemental	Select the check box if you want to import funds supplemental data.
 Allow Code 	v Creation of New es	Select the check box if you want to allow user to create new codes in RISKMASTER X.
	rt Funds for Open ns Only	Select the check box if you want to import funds records for claims with claim status as 'Open'.
	k Duplicate nents	Select the check box if you want do not want to import duplicate payments.
 Acce Num 	pt Duplicate Checks bers	Select the check box if you want to import duplicate check numbers.
■ Impo too	rt Cleared Payments	Select the check box if you want to import payments with a cleared status.
 Matc 	h Payee by Name	Select the check box if you want to search for payee records using the payee name.
 Matc 	h Payee by Tax ID	Select the check box if you want to search for payee records using the payee tax Identification number.
 Matc 	h Payee by DOB	Select the check box if you want to search for payee records using the payee date of birth.
 Matc 	h by Entity ID	Select the check box if you want to search for payee records using the entity Identification number
 Impo 	rt Multiple Payees	Select the check box if you want to import multiple payees.

Funds Deposit	Select the option if you want to import funds deposit data.
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Document Diaries Funds Maintenance MyWork Policy Reports Search Security User Documents Utilities Help				
Utilities => View Scheduled Tasks				
DIS Optionset				
Optionset Name test21				
□ Verify the data before import				
Select Heavy Access Database to Import From				
Select Access Database to Import From: C:\Document and setting: Browse				
Select the areas you wish to Import				
○ Employees ○ Organization Hierarchy ○ Funds ● Funds Deposit ○ Vehides ○ Entities ○ Policies				
○ Reserves ○ Organization Exposure ○ Patients ○ Physicians ○ Medical Staff ○ Administrative Tracking				
Employees				
Organization Hierarchy				
Funds				
Funds Deposit				
Update Even if Blank or Zero				
Allow Creation of New Codes				
Update Even if Blank or Zero Select the check box if you want to import fields even when the value in them is either blank or zero.				
Allow Creation of New Select the check box if you want to allow user to create new codes in RISKMASTER X.				

Vehicles	Select the option if you want to import vehicle data.
Document Diaries Funds Maintenance My Wor Utilities => View Scheduled Tasks	k Policy Reports Search Security UserDocuments Utilities Help
DIS Optionset	
Optionset Name test21	
Verify the data before import	
Select Heavy Access Database to Import	From
Select Access Database to Import From	n: C: \Document and setting: Browse
Select the areas you wish to Import	
\odot Employees \bigcirc Organization Hierarchy \bigcirc	Funds OFunds Deposit Vehides OEntities OPolicies
○ Reserves ○ Organization Exposure ○	Patients OPhysicians OMedical Staff OAdministrative Tracking
Employee <i>s</i>	
Organization Hierarchy	
Funds	
Funds Deposit	
Vehicles	
Import Supplemental Data	
Update Even if Blank or Zero	
□ Allow Creation of New Codes	
 Import Supplemental Data 	Select the check box if you want to import vehicle supplemental data.
 Update Even if Blank or Zero 	Select the check box if you want to import fields even when the value in them is either blank or zero.
 Allow Creation of New Codes 	Select the check box if you want to allow user to create new codes in RISKMASTER X.

Entities	Select the option if you want to import entities data.			
Document Diaries Funds Maintenance My Work P	olicy Reports Search Security UserDocuments Utilities Help			
Utilities => View Scheduled Tasks				
DIS Optionset				
Optionset Name test21				
Verify the data before import.				
Select Heavy Access Database to Import From Select Heavy Access	m			
Select Access Database to Import From:	C: \Document and setting: Browse			
Select the areas you wish to Import				
○ Employees ○ Organization Hierarchy ○ Fu	nds OFunds Deposit OVehides Entities			
○ Reserves ○ Organization Exposure ○ Par	tients O Physicians O Medical Staff O Administrative Tracking			
Employees				
Organization Hierarchy				
Funds				
Funds Deposit				
Vehicles				
Entities				
Import Supplemental Data				
Update Even if Blank or Zero				
Allow Creation of New Codes				
Match By Tax ID				
Match By Name				
Match By Abbrev				
Match By DOB				

•	Import Supplemental Data	Select the check box if you want to import entities supplemental data.
•	Update Even if Blank or Zero	Select the check box if you want to import fields even when the value in them is either blank or zero.
•	Allow Creation of New Codes	Select the check box if you want to allow user to create new codes in RISKMASTER X.
•	Match by Tax ID	Select the check box if you want to search entity records using the entity tax Identification number.
•	Match by Name	Select the check box if you want to search entity records using entity name
•	Match by Abbreviation	Select the check box if you want to search entity records using the entity abbreviation
•	Match by DOB	Select the check box if you want to search entity records using the entity date of birth

	Policies		S	elect the option i	f you want to	import policies data.	
Select the areas	you wish to	o Import					
⊖ Employees ⊖ O	rganization I	Hierarchy	○ Funds	◯ Funds Deposit	○ Vehicles	○ Entities	Policies
○ Reserves ○ 0	rganization I	Exposure	O Patien	ts 🔿 Physicians	O Medical Staff	O Administrative Tracking	
Employees							
Organization Hier	archy						
Funds							
Funds Deposit							
Vehicles							
Entities							
Policies							
Import Supplem	nental Data						
Allow Creation	of New Code	S					
Match Insured b Match Insured by:	by Entity ID						
	[Name		Abbrev	[DOB	
Match Insurer b Match Insurer by:	y Entity ID						
	[Name		Abbrev	[DOB	
Create Insured	Claimant						
Import Addition Match Additional In							
	[Name		DOB			

•	Import Supplemental Data	Select the check box if you want to import policy supplemental data.
•	Allow Creation of New Codes	Select the check box if you want to allow user to create new codes in RISKMASTER X.
•	Match Insured by Entity ID	Select the check box if you want to search insured entity records using the entity id.
-	Match Insured by Tax ID	Select the check box if you want to search insured entity records using the tax identification number.
-	Match Insured by Name	Select the check box if you want to search insured entity records using the entity name.
-	Match Insured by Abbrev	Select the check box if you want to search insured entity records using the entity abbreviation
-	Match Insured by DOB	Select the check box if you want to search insured entity records using the entity date of birth
•	Match Insurer by Entity ID	Select the check box if you want to search insurer entity records using the entity id.
•	Match Insurer by Tax ID	Select the check box if you want to search insurer entity records using the tax identification number.
•	Match Insurer by Name	Select the check box if you want to search insurer entity records using the entity name.
•	Match Insurer by Abbrev	Select the check box if you want to search insurer entity records using the entity abbreviation.
-	Match Insurer by DOB	Select the check box if you want to search insurer entity records using the entity date of birth which is used in Health claims.
•	Create Insured Claimant	Select the check box if you want to add insured entity as claimant.
-	Import Additional Interest	Select the check box if you want to import additional interest.
•	Match Additional Interests by Tax ID	Select the check box if you want to search additional interests records using the tax identification number.
•	Match Additional Interests by Name	Select the check box if you want to search additional interests records using the name.
•	Match Additional Interests by DOB	Select the check box if you want to search additional interests records using the date of birth .

Reserves	Select the option if you want to import reserves data.
DIS Optionset	
Optionset Name	
Verify the data before import	
Select Heavy Access Database to Import Fr	om
Select Access Database to Import From:	
Select the areas you wish to Import	
○ Employees ○ Organization Hierarchy ○ Fi	unds O Funds Deposit O Vehicles O Entities O Policies
	atients O Physicians O Medical Staff O Administrative Tracking
Employees	
Organization Hierarchy	
Funds	
Funds Deposit	
Vehicles	
Entities	
Policies	
Reserves	
Allow Creation of New Codes	
Check Duplicate Reserves	
 Allow Creation of New Codes 	Select the check box if you want to allow user to create new codes in RISKMASTER X.
 Check Duplicate Reserves 	Select the check box if you do not want to import duplicate reserves.

Organizational Exposure	Select the option if you want to import organizational exposure data.
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DIS Optionset	
Optionset Name	
□ Verify the data before import	
Select Heavy Access Database to Import From	
Select Access Database to Import From: C:\Document and setting: Browse	
Select the areas you wish to Import	
○ Employees ○ Organization Hierarchy ○ Funds ○ Funds Deposit ○ Vehicles ○ Entities ○ Pol	icies
○ Reserves ● Organization Exposure ○ Patients ○ Physicians ○ Medical Staff ○ Administrative Tracking	
Employees	
Organization Hierarchy	
Funds	
Funds Deposit	
Vehicles	
Entities	
Policies	
Reserves	
Organization Exposure	
Import Supplemental Data	
Update Even if Blank or Zero	
Allow Creation of New Codes	
Assume New Records Only(No Update)	
Import Supplemental Data Select the check box if you want to import Organization Exposure supplemental data.	nal
• Update Even if Blank or Zero Select the check box if you want to import fields even when the value in them is either blank or zero.	
 Allow Creation of New Codes Select the check box if you want to allow user to create new codes in RISKMASTER X. 	;
 Assume New Records Only (no update) Select the check box if you want to import all records a new records. 	S

Patients	Select the option if you want to import patient's data.
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DIS Optionset	
Optionset Name	
Verify the data before import	
Select Heavy Access Database to Import From	
Select Access Database to Import From: C:\Do	cument and setting Browse
Select the areas you wish to Import	
○ Employees ○ Organization Hierarchy ○ Funds	•
O Reserves O Organization Exposure Patients	OPhysicians OMedical Staff OAdministrative Tracking
Employees Organization Hierarchy	
Funds	
Funds Deposit	
Vehicles	
Entities	
Policies	
Reserves	
Organization Exposure	
Patients	
Import Supplemental Data	
Allow Creation of New Codes	
🗌 Validate Data Only (No Upload)	
Match Patient/Physician Number Only	
Match Patient Account Number Medical Record	l Number
 Import Supplemental Data 	Select the check box if you want to import patient supplemental data.
 Allow Creation of New Codes 	Select the check box if you want to allow user to create new codes in RISKMASTER X.
 Validate Data Only (No Upload) 	Select the check box if you want to only validate patient data.
 Match Patient Number Only 	Select the check box if you want to search patient records using the patient number.
 Match Patient Account Number 	Select the option if you want to search patient records using the patient account number.
 Medical Record Number 	Select the option if you want to search patient records using the medical record number.

	Physicians	Select the option if you want to import physician's data.
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DIS Optionset	
Optionset Name	
Verify the data before import	
Select Heavy Access Database to Import Fro	m
	C:\Document and setting: Browse
Select the areas you wish to Import	
 Employees Organization Hierarchy O Full 	nds OFunds Deposit OVehides OEntities OPolicies
Reserves Organization Exposure Pat	
Employees	
Organization Hierarchy	
Funds	
Funds Deposit	
Vehicles	
Entities	
Policies	
Reserves	
Organization Exposure	
Patients	
Physicians	
Import Supplemental Data	
Allow Creation of New Codes	
🗌 Validate Data Only (No Upload)	
Match Physician Number Only	
 Import Supplemental Data 	Select the check box if you want to import physician supplemental data.
 Allow Creation of New Codes 	Select the check box if you want to allow user to create new codes in RISKMASTER X.
 Validate Data Only (No Upload) 	Select the check box if you want to validate physician data only.
 Match Physician Number Only 	Select the check box if you want to search physician records using the physician number.

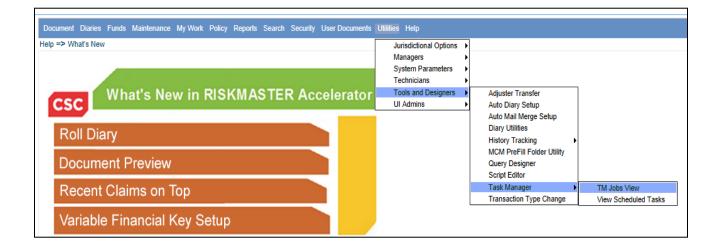
Medical Staff	Select the option if you want to import medical staff data.
DIS Optionset	
Optionset Name	
□ Verify the data before import	
Select Heavy Access Database to Import From	m
Select Access Database to Import From:	C:\Document and settings Browse
Select the areas you wish to Import	
○ Employees ○ Organization Hierarchy ○ Fun	nds O Funds Deposit O Vehides O Entities O Policies
○ Reserves ○ Organization Exposure ○ Pati	ients O Physicians Medical Staff O Administrative Tracking
Employees	
Organization Hierarchy	
Funds	
Funds Deposit Vehicles	
Entities	
Policies	
Reserves	
Organization Exposure	
Patients	
Physicians	
Medical Staff	
🗌 Import Supplemental Data	
Allow Creation of New Codes	
🗌 Validate Data Only (No Upload)	
	Select the check box if you want to import medical staff supplemental data.
	Select the check box if you want to allow user to create new codes in RISKMASTER X.
	Select the check box if you want to validate medical staff data only.

Administrative Tracking	Select the option if you want to import administrative tracking data.
DIS Optionset	
Optionset Name	
Verify the data before import	
Select Heavy Access Database to Import From	20
Select Access Database to Import From:	
Select the areas you wish to Import Cemployees Organization Hierarchy OFun	ds O Funds Deposit O Vehicles O Entities O Policies
Organization Refarming OPati Organization Exposure OPati	
Employees	ens O Physicians O Medical Staff ® Administrative Fracking
Organization Hierarchy	
Funds	
Funds Deposit	
Vehicles	
Entities	
Policies	
Reserves	
Organization Exposure	
Patients	
Physicians	
Medical Staff	
Administrative Tracking	
Allow Creation of New Codes	
Select Admin Tracking Table: Certificate Tracki	ing 💙
○ Always Add Add or Update	
Match Field: AGENCY_NAME_TEXT V	
Save Cancel	
	Select the check box if you want to allow user to create new codes in RISKMASTER X.
	From the drop down list, select the administrative tracking table that you want to import.
	Select the option if you want to always import records from selected table.
 Add or Update 	Select the option if you want to update records based on the Match by Field and add records only when there is no match available.
	From the drop down list, select the field to be used as search criteria in the Add or Update option.
Save	Select the button to save changes.
Cancel	Select the button to close the DIS Optionset window without saving the changes.

Running Status of DIS Jobs

Once the DIS job is scheduled and the optionset is saved , to check the job state of the scheduled job please follow below mentioned steps.

- 1. From the main menu, select Utilities. The Utilities menu opens.
- 2. From the Utilities menu, choose Tools & Designers. The Tools & Designers menu opens.
- 3. From the Tools & Designers menu, choose Task Manager. The Task Manager menu opens.
- 4. From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.
- 5. From the View Scheduled Tasks window, select the 'Schedule a New Task' button.



ocume	ent Diaries Funds Mair	ntenance My Work Reports	Search Security	User Documents	Utilities Help
lities =	TM Jobs View				
	ing Jobs				
	Job Name	Description	Job State	e S	Start Date/Time
0	Job Name	Description DIS	Job State Running		Start Date/Time 11/18/2016 5:50 P
0				1	

Job Nan	ie	Description	Job State	Start Date/Time	End Date/Time
DIS_e		DIS	Running	10/21/2016 12:30 PM	
Currency Interface	🗋 TM Job St	tatus Details - Google (Chrome		
	③ 20.198.	156.52/Riskmaster	JI/UI/Utilities/ToolsDe	signers/TaskManager/TMSta	tus Details.aspx?Joł
t Jobs 265 recor me WPA	Ni Ni Ni Ni	umber of invalid reco umber of invalid reco umber of invalid reco umber of Successfully umber of Successfully umber of Successfully	rds after Required fields rds after Contact fields rds after Entity other fie y transferred entites : 2 y transferred entities in y transferred entities in	elds validation : 0) ; ; ; ;

The purpose of the Running job state is to show the process status of data given in import file.

This process shows the complete status of data given in import file.

- Number of records read for particular data given in import file
- Number of valid records will inform about the records with no errors
- Number of invalid records will show the records which has invalid data or errors such as invalid codes and incorrect or missing data in required fields.
- Number of records imported to various Riskmaster database tables such as number of entities imported to entity table and their information related to address, contact has been transferred to other Riskmaster database tables.

Scheduling DDS Tasks

To Schedule a DDS Task: One Time

- From the main menu, select Utilities. The Utilities menu opens.
- 2. From the Utilities menu, choose Tools & Designers. The Tools & Designers menu opens.
- 3. From the Tools & Designers menu, choose Task Manager. The Task Manager menu opens.
- 4. From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.

В				
uments Utiliti	es Help			
	Jurisdictional Options Managers System Parameters			
ate of C	Technicians	Claim Type	Claim Status	
10/01/2	Tools and Designers	Adjuster Transfer	Open	
09/01/2010	UI Admins	Auto Diary Setup	Open	
10/01/2016		Auto Mail Merge Setup Diary Utilities	Open	
10/26/2015	PqrTest, MnoATest	History Tracking	Open	
10/30/2015	Pqr, Mno	MCM PreFill Folder Utility	Open	
10/06/2015	Pqr, Mno	Query Designer	Open	
1/05/2011	ANDERSON, ROBE	Script Editor Task Manager	TM Jobs	View
1/05/2011	ANDERSON, ROBE	R Transaction Type Change	View Sch	eduled Tasks
1/02/2016	Smith, John	Checkers	Open	

- 5. Select the Schedule a New Task button.
- 6. From the Task Type drop down list, select the type of task as DDS.
- 7. In the Task Name field, enter the name of the task.
- 8. From the Schedule Type drop down list, select the type of schedule as OneTime.
- 9. Complete the fields on the Schedule a Task: One Time as shown below:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Optionset	Select the button to open the DDS Optionset window

Cancel

Select the button to close the window without saving the changes.

- 10. If necessary, use the DDS Optionset window to enter details about the task.
- 11. Select the Save button.

The task is scheduled to run once.

RISKMASTER	google	Test	DEB	
~~	Document Diaries Funds M	Maintenance My Work Reports Search	Security User Documents Utiliti	es Help
Diaries	Utilities => View Schedule	d Tasks		
Diary List				
Utilities	Task Type:		•	
<u>View Scheduled Tasks</u>	Task Name: Sub Task Name: Schedule Type	Process WPA Diarie Financial History Pr Billing Scheduler BES Scheduler History Tracking Print Batch FROI AC Process Overdue D Policy System Upda Print Check Batch Claim Balancing Fraud Analytics Sch Auto Mail Merge Reserve Balance ISO MMSEA 1099-MISC PositivePay DDS	ocessing CORD iaries ite	
		DCI Reporting	•	

CSC RISKM	ASTER	Accele	rator	-				
RISKMASTER	google		Test			DEB		
KISKMASTER	google Document Diaries Utilities => View Sche Schedule a Tasi Task Type: Task Name: SubTask Name: Schedule Type: Enter the Date Date: Time: (India Stand)	eduled Tasks k	e My Work Rep DDS DDS None OneTime	to Run the		User Documents	Utilities	Help
			Optionset	Cance	el			

To Schedule a DDS Task: Periodically

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Document Diaries Funds Maintenance My Work	Reports Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks	
Schedule a Task	
Task Type:	DDS
Task Name:	DDS
SubTask Name:	None
Schedule Type:	Periodically
Enter the start Date and Time:	
Date :	11/02/2016
Time : (India Standard Time)	03:50 PM
Enter the interval after which to r	epeat the task:
Interval Type :	Weeks •
Interval :	2
	Optionset Cancel

- 2. From the Task Type drop down list, select the type of task as DDS.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Periodically.
- 5. Complete the fields on the Schedule a Task: Periodically window as shown below:

Enter Start Date and Time:

- Date Enter the start date of the scheduled task or select the date from the calendar.
- **Time** Enter the start time of the scheduled task.

Enter the interval after which to repeat the task:

- Interval Type From the drop down list, select the type of interval after which you want to repeat the task.
- **Interval** Enter the interval after which you want to repeat the task.
- **Optionset** Select the button to open the DDS Optionset window.
- **Cancel** Select the button to close the window without saving the changes.
- 6. If necessary, use the DDS Optionset window to enter details about the task.

7. Select the Save button.

The task is scheduled to run periodically based on the defined interval.

To Schedule a DDS: Weekly

1. From the View Scheduled Tasks window, select the 'Schedule a New Task' button. The View Scheduled Task window opens.

Document Diaries Funds Maintenance My Work	Reports Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks	
Schedule a Task	
Task Type:	DDS
Task Name:	DDS
Schedule Type:	Weekly
F 1 01 1 P 1 1 F	
Enter Start Date and Time:	
Date:	11/02/2016
Time: (India Standard Time)	03:55 PM
Select the days you would like to	Run the Task on:
	 Monday Tuesday Wednesday Thursday Friday Saturday Sunday
	Optionset

- 2. From the Task Type drop down list, select the type of task as DDS.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Weekly.
- 5. Complete the fields on the Schedule a Task: Weekly as shown below:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Select the days you would like to Run the Task on	Select the check box for a day of the week on which you want to run the scheduled task. <u>Note:</u> You can select more than one day to run the scheduled task.
Optionset	Select the button to open the DDS Optionset window.

Cancel

Select the button to close the window without saving the changes.

- 6. If necessary, use the DDS Optionset window to enter details about the task.
- Select the Save button.
 The task is scheduled to run weekly on the days selected.

To Schedule a DDS Task: Monthly

- 1. From the main menu, select Utilities. The Utilities menu opens.
- 2. From the Utilities menu, choose Tools & Designers. The Tools & Designers menu opens.
- From the Tools & Designers menu, choose Task Manager. The Task Manager menu opens.
- 4. From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.

Document Diaries Funds Maintenance My Work	Reports Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks	
Schedule a Task	
Task Type:	DDS
Task Name:	DDS
Schedule Type:	Monthly
Enter the start Month and other o	letails:
Month:	July
Day of Month:	1
Time: (India Standard Time)	04:00 PM
	Optionset Cancel

- 5. From the View Scheduled Tasks window, select the 'Schedule a New Task' button.
- 6. From the Task Type drop down list, select the type as DDS.
- 7. In the Task Name field, enter the name of the task.
- 8. From the Schedule Type drop down list, select the type of schedule as Monthly.
- 9. Complete the fields on the Schedule a Task: Monthly window as shown below:

Month	From the drop down list, select the month in which you want to schedule the task.
Day of Month	Enter the day on which you want to schedule the task in the selected month.

Time	Enter the start time of the scheduled task.
Optionset	Select to open the DDS Optionset window
Cancel	Select the button to close the window without saving the changes.

- 10. If necessary, use the DDS Optionset window to enter details about the task.
- 11. Select the Save button.

The task is scheduled to run monthly.

To Schedule a DDS Task: Yearly

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Document Diaries Funds Maintenance My Work	Reports Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks	
Schedule a Task	
Task Type:	DDS
Task Name:	DDS
Schedule Type:	Yearly
Enter Start Date and Time:	
Litter Start Date and Time.	
Date:	11/02/2016
<u> Time: (India Standard Time)</u>	04:00 PM
Select the months you would like	to Run the Task in:
	 January February March ✓ April May June July Aug ✓ Sep Oct Nov Dec
	Optionset Cancel

- 2. From the Task Type drop down list, select the type of task as DDS.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Yearly.
- 5. Complete the fields on the Schedule a Task: Yearly window as shown below:

Enter Start Date and Time:

 Date
 Enter the start date of the scheduled task or select the date from the calendar.

Time	Enter the start time of the scheduled task.
Select the months you would like to	Select the check box for the month in which you want to schedule the task to run.
Run the Task in:	Note: You can select more than one month to schedule the task to run.
Optionset	Select the button to open the DDS Optionset window.
Cancel	Select the button to close the window without saving the changes.

- 1. If necessary, use the DDS Optionset window to enter details about the task.
- Select the Save button.
 The task is scheduled to run yearly.

DDS Optionset window

For details regarding the DDS option window please refer **DA DDS User Guide**.

Scheduling PSO Tasks

To Schedule a PSO Task: One Time

- 12. From the main menu, select Utilities. The Utilities menu opens.
- 13. From the Utilities menu, choose Tools & Designers. The Tools & Designers menu opens.
- 14. From the Tools & Designers menu, choose Task Manager. The Task Manager menu opens.
- 15. From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.
- 16. From the View Scheduled Tasks window, select the 'Schedule a New Task' button.

В			
uments Utiliti	es Help		
	Jurisdictional Options Managers System Parameters		
ate of C	Technicians	Claim Type	Claim Status
10/01/2	Tools and Designers	Adjuster Transfer	Open
09/01/2010	UI Admins	Auto Diary Setup Auto Mail Merge Setup	Open
10/01/2016		Diary Utilities	Open
10/26/2015	PqrTest, MnoATest	-	Open
10/30/2015	Pqr, Mno	MCM PreFill Folder Utility	Open
10/06/2015	Pqr, Mno	Query Designer Script Editor	Open
1/05/2011	ANDERSON, ROBER	Task Manager	TM Jobs View
1/05/2011	ANDERSON, ROBER	Transaction Type Change	View Scheduled Tasks
1/02/2016	Smith, John	Checkers	Open

- 17. From the Task Type drop down list, select the type of task as PSO.
- 18. In the Task Name field, enter the name of the task.
- 19. From the Schedule Type drop down list, select the type of schedule as One Time.
- 20. Complete the fields on the Schedule a Task: One Time window as shown below:

Enter the Date and Time you would like to Run the Task on:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Optionset	Select the button to open the PSO Optionset window.
Cancel	Select the button to close the window without saving the changes.

21. Select the Optionset button.

The PSO Optionset window opens.

22. Complete the fields on the PSO Optionset window and select the Save Settings button. The task is scheduled to run one time.

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		User license count exceede	ed. Please contact Riskmas
RISKMASTER	google	Test	DEB
 Help What's New Utilities View Scheduled Tasks 	Document Diaries Funds Utilities => View Scheduled T Task Type: Task Name: Sub Task Name: Schedule Type	Maintenance My Work Policy Reports Sea Fasks Process WPA Diaries Financial History Processing Billing Scheduler BES Scheduler History Tracking Print Batch FROI ACORD Process Overdue Diaries Policy System Update Print Check Batch Claim Balancing Fraud Analytics Scheduler Auto Mail Merge Reserve Balance ISO MMSEA 1099-MISC PositivePay DDS DCI Reporting Print Batch EOB DIS MBR Currency Exchange Interface PSO	rch Security User Documents Utilities Help

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~~					My Work	Policy	Reports	Search	Security	User Documents	Utilities	Help
	Utilities => \	/iew Sche	duled	Tasks								
	Schedul	e a Tasl	¢									
	Tack Type				PSO							
	Task Type											
	Task Nam	e:			PSO							
	SubTask N	Name:			None							
	Schedule	Туре:			OneTi	me						
	Enter ti	ie Date	and	Time you v	vould lik	te to R	lun the	Task o	n:			
	Data				11/10/	2016						
	Date:				11/10/	2010		ļu H	1			
	Time: (In	dia Stano	dard T	<u>ime)</u>	08:00	PM						
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					Optio	nset	Ca	ncel				

To Schedule an PSO Task: Periodically

8. From the View Scheduled Tasks window, select the 'Schedule a New Task' button. The View Scheduled Task window opens.

Document Diaries Funds Maintenance	My Work Policy Reports Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks	
Schedule a Task	
Task Type:	PSO
Task Name:	PSO
SubTask Name:	None
Schedule Type:	Periodically
Enter the start Date and Time:	
Date :	11/10/2016
Time : (India Standard Time)	08:00 PM
Enter the interval after which to	b repeat the task:
Interval Type :	Weeks V
Interval :	2
	Optionset Cancel

- 9. From the Task Type drop down list, select the type of task as PSO.
- 10. In the Task Name field, enter the name of the task.
- 11. From the Schedule Type drop down list, select the type of schedule as 'Periodically'.
- 12. Complete the fields on the Schedule a Task: Periodically as shown below:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Enter the interval after	er which to repeat the task:
Interval Type	From the drop down list, select the type of interval after which you want to repeat the task.
Interval	Enter the interval after which you want to repeat the task.
Optionset	Select the button to open the PSO Optionset window.
Cancel	Select the button to close the window without saving the changes.

13. Select the Optionset button.

The PSO Optionset window opens.

14. Complete the fields on the PSO Optionset window and select the Save Settings button. The task is scheduled to run periodically based on the defined interval.

To Schedule an PSO Task: Weekly

8. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Document Diaries Funds Maintenand	e My Work	Policy Rep	orts Sea	rch Security	User Documents	Utilities	Help
Utilities => View Scheduled Tasks							
Schedule a Task							
Task Type:	PSO						
Task Name:	PSO						
Schedule Type:	Week	dy					
Enter Start Date and Time:							
Enter Start Bate and Time.							
Date:	11/10)/2016					
Time: (India Standard Time)	08:00) PM	1				
Select the days you would like	e to Run t	the Task (on:				
	✓ Tu □ We □ Th ☑ Fri □ Sa	onday lesday ednesday lursday day turday nday					
	Opti	onset	Cance	el .			

- 9. From the Task Type drop down list, select the type of task as PSO.
- 10. In the Task Name field, enter the name of the task.
- 11. From the Schedule Type drop down list, select the type of schedule as Weekly.
- 12. Complete the fields on the Schedule a Task: Weekly window:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Select the days you would like to	Select the check box for a day of the week on which you want to run the scheduled task.
Run the Task on	Note: You can select more than one day to run the scheduled task.
Optionset	Select the button to open the PSO Optionset window.
Cancel	Select the button to close the window without saving the changes.

13. Select the Optionset button.

The PSO Optionset window opens.

14. Complete the fields on the PSO Optionset window and select the Save Settings button. The task is scheduled to run weekly on the days selected.

To Schedule an PSO Task: Monthly

8. From the View Scheduled Tasks window, select the Schedule a New Task button.

Document Diaries Funds Maintenanc	My Work Policy Reports Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks	
Schedule a Task	
Task Type:	PSO
Task Name:	PSO
Schedule Type:	Monthly
Enter the start Month and ot	er details:
Month:	July 🗸
Day of Month:	2
Time: (India Standard Time)	08:00 PM
	Optionset Cancel

- 9. From the Task Type drop down list, select the type of task as PSO.
- 10. In the Task Name field, enter the name of the task.
- 11. From the Schedule Type drop down list, select the type of schedule as Monthly.
- 12. Complete the fields on the Schedule a Task: Monthly window as shown below:

Enter the start Month and other details:

Month	From the drop down list, select the month in which you want to schedule the task.
Day of Month	Enter the date on which you want to schedule the task in the selected month.
Time	Enter the start time of the scheduled task.
Optionset	Select to open the PSO Optionset window.
Cancel	Select the button to close the window without saving the changes.

13. Select the Optionset button.

The PSO Optionset window opens.

14. Complete the fields on the PSO Optionset window and select the Save Settings button. The task is scheduled to run monthly.

To Schedule an PSO Task: Yearly

8. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Document Diaries Funds Maintenance My W	ork Policy Reports Search Security User Documents Utilities Hel
Utilities => View Scheduled Tasks	
Schedule a Task	
Schedure a Task	
Task Type:	PSO
Task Name:	P50
Schedule Type:	Yearly
Enter Start Date and Time:	
Date:	11/10/2016
	11/10/2010
Time: (India Standard Time)	08:00 PM
Select the months you would like to	Dup the Tack in:
Select the months you would like to	
	□ January
	February
	March April
	□ June
	✓ July
	□ Sep □ Oct
	Dec
	Optionset Cancel

- 9. From the Task Type drop down list, select the type of task as PSO.
- 10. In the Task Name field, enter the name of the task.
- 11. From the Schedule Type drop down list, select the type of schedule as Yearly.
- 12. Complete the fields on the Schedule a Task: Yearly as shown below:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.		
Time	Enter the start time of the scheduled task.		
Select the months you would like to Run the Task in:	Select the check box for the month in which you want to schedule the task to run.		
	Note: You can select more than one month to schedule the task to run.		
Optionset	Select the button to open the PSO Optionset window.		
Cancel	Select the button to close the window without saving the changes.		

13. Select the Optionset button.

The PSO Optionset window opens.

14. Complete the fields on the PSO Optionset window and select the Save Settings button. The task is scheduled to run yearly.

PSO Optionset window

To open from the View Scheduled Task window, select the Optionset button.

PSO Export Settings

Document Diaries Funds Maintenance My Work	Reports Search Security User Documents Utilit	ies Help	
Utilities => View Scheduled Tasks			0 🗙
PSO			
8			
Optionset Name*	Provider ID*	PSO ID*	Company
	12345_At	1234568	
Event Date From	Event Date To	Event Date Added From	Event Date Added To
MM/dd/yyyy	MM/dd/yyyy	MM/dd/yyyy	MM/dd/yyyy
Updated by User	Event Numbers	Test Run	
	011550		

PSO Export Settings Tab	
Optionset Name	Enter the name of the option set. The Option Name is required.
Provider Id	Enter the unique Provider ID.
PSO ID	Enter the PSO ID.
Company Name	Enter the "Department" for which events need to be processed.
Event Date From	Select the start date of the "event created" range.
Event Date To	Select the end date of the "event created" range.
Event Date Added From	Select the start date of the "event added" range
Event Date To	Select the end date of the "event added" range.
Updated By User	Enter the user name.
Event Numbers	Specify event numbers to be processed.
Email Notice	Specify Email ID for notification.
Test Report	Select to extract as a test reports.
Save Settings Cancel	Select to Save the changes.
Gallee	Select to close the window without saving the changes.

Scheduling EDI/MED-EDI /Florida MED-EDI Tasks

To Schedule a EDI Task: One Time

- 1. From the main menu, select Utilities.
- The Utilities menu opens.
 From the Utilities menu, choose Tools & Designers.
 - The Tools & Designers menu opens.
- From the Tools & Designers menu, choose Task Manager. The Task Manager menu opens.
- 4. From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.
- 5. From the View Scheduled Tasks window, select the 'Schedule a New Task' button.

В			
uments Utiliti	es Help		
	Jurisdictional Options Managers System Parameters		
ate of C	Technicians •	Claim Type	Claim Status
10/01/2	Tools and Designers	Adjuster Transfer	Open
09/01/2010	UI Admins •	Auto Diary Setup Auto Mail Merge Setup	Open
10/01/2016		Diary Utilities	Open
10/26/2015	PqrTest, MnoATest		Open
10/30/2015	Pqr, Mno	MCM PreFill Folder Utility	Open
10/06/2015	Pqr, Mno	Query Designer Script Editor	Open
1/05/2011	ANDERSON, ROBER	Task Manager	TM Jobs View
1/05/2011	ANDERSON, ROBER	-	View Scheduled Tasks
1/02/2016	Smith, John	Checkers	Open

- 6. From the Task Type drop down list, select the type of task as EDI.
- 7. In the Task Name field, enter the name of the task.
- 8. From the Schedule Type drop down list, select the type of schedule as One Time.
- 9. Complete the fields on the Schedule a Task: One Time window as shown below:

Enter the Date and Time you would like to Run the Task on:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Optionset	Select the button to open the EDI Optionset window.
Cancel	Select the button to close the window without saving the changes.

10. Select the Optionset button.

The EDI Optionset window opens.

11. Complete the fields on the EDI Optionset window and select the Save Settings button. The task is scheduled to run one time.

		User license count exceeded. Please contact Riskmas
RISKMASTER	google	Test DEB
	Document Dianes Pt	unds Maintenance My Work Policy Reports Search Security User Documents Utilities Help
What's New	Utilities => View Sched	uled Tasks
Utilities View Scheduled Tasks	Task Type:	Process WPA Diaries
	Task Name:	Financial History Processing Billing Scheduler
	Sub Task Name:	BES Scheduler History Tracking
	Schedule Type	Print Batch FRÖI ACORD Process Overdue Diaries
		Policy System Update Print Check Batch
		Claim Balancing Fraud Analytics Scheduler
		Auto Mail Merge Reserve Balance
		ISO MMSEA 1099-MISC
		PositivePay
		DDS DCI Reporting
		Print Batch EOB DIS MOD
		MBR Currency Exchange Interface EDI
google		Test DEB
	iunde Maiotonance I	
Document Diaries F		
Document Diaries F Utilities => View Scher	duled Tasks	
Document Diaries F	duled Tasks	
Document Diaries F Utilities => View Scher	duled Tasks	
Document Diaries F Utilities => View Sched Schedule a Task	duled Tasks	Jy Work Policy Reports Search Security User Documents Utilities Help
Document Diaries F Utilities => View Sched Schedule a Task Task Type:	duled Tasks	My Work Policy Reports Search Security User Documents Utilities Help
Document Diaries F Utilities => View Sched Schedule a Task Task Type: Task Name:	duled Tasks	Ay Work Policy Reports Search Security User Documents Utilities Help EDI EDI
Document Diaries F Utilities => View Sched Schedule a Task Task Type: Task Name: SubTask Name: Schedule Type:	duled Tasks	Ay Work Policy Reports Search Security User Documents Utilities Help EDI EDI None OneTime
Document Diaries F Utilities => View Sched Schedule a Task Task Type: Task Name: SubTask Name: Schedule Type:	duled Tasks	My Work Policy Reports Search Security User Documents Utilities Help EDI EDI None
Document Diaries F Utilities => View Sched Schedule a Task Task Type: Task Name: SubTask Name: Schedule Type: Enter the Date	duled Tasks	Ay Work Policy Reports Search Security User Documents Utilities Help EDI EDI None OneTime
Document Diaries F Utilities => View Sched Schedule a Task Task Type: Task Name: SubTask Name: Schedule Type:	duled Tasks	Ay Work Policy Reports Search Security User Documents Utilities Help EDI EDI None OneTime
Document Diaries F Utilities => View Sched Schedule a Task Task Type: Task Name: SubTask Name: Schedule Type: Enter the Date	duled Tasks	Ay Work Policy Reports Search Security User Documents Utilities Help EDI EDI None OneTime
Document Diaries F Utilities => View Sched Schedule a Task Task Type: Task Name: SubTask Name: Schedule Type: Enter the Date Date:	duled Tasks	Ay Work Policy Reports Search Security User Documents Utilities Help EDI EDI None OneTime puld like to Run the Task on:
Document Diaries F Utilities => View Sched Schedule a Task Task Type: Task Name: SubTask Name: Schedule Type: Enter the Date Date:	duled Tasks	Ay Work Policy Reports Search Security User Documents Utilities Help EDI EDI None OneTime Duld like to Run the Task on:

To Schedule an EDI Task: Periodically

1. From the View Scheduled Tasks window, select the 'Schedule a New Task' button. The View Scheduled Task window opens.

Desument Dission Funds Maintenant A	ly Work Policy Reports Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks	ny work Policy Reports Search Security User Documents Utilities Help
Schedule a Task	
Scheutie a Task	
Task Type:	EDI
Task Name:	EDI
SubTask Name:	None
Schedule Type:	Periodically
Enter the start Date and Time:	
Date :	11/10/2016
Time : (India Standard Time)	08:00 PM
Enter the interval after which to	repeat the task:
Interval Type :	Weeks V
Interval :	2
Interval .	2
	Optionset Cancel

- 2. From the Task Type drop down list, select the type of task as EDI.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as 'Periodically'.
- 5. Complete the fields on the Schedule a Task: Periodically as shown below:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Enter the interval after	er which to repeat the task:
Interval Type	From the drop down list, select the type of interval after which you want to repeat the task.
Interval	Enter the interval after which you want to repeat the task.
Optionset	Select the button to open the EDI Optionset window.
Cancel	Select the button to close the window without saving the changes.

6. Select the Optionset button.

The EDI Optionset window opens.

 Complete the fields on the EDI Optionset window and select the Save Settings button. The task is scheduled to run periodically based on the defined interval.

To Schedule an EDI Task: Weekly

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Document	Diaries	Funds	Maintenance	My Work	Policy	Reports	Search	Security	User Documents	Utilities	Help
Utilities => \	View Sch	eduled '	Tasks								
Schedul	e a Tas	sk									
Task Type Task Nam Schedule	ie:			EDI EDI Wee	kly						
Schedule	Type:			ince							
Enter S	tart Da	ate an	d Time:								
<u>Date:</u> <u>Time: (In</u> e	dia Star	ndard 1	<u>lime)</u>		0/2016 0 PM	5		đ			
Select t	the day	/s you	would like	to Run	the Ta	ask on:					
				☑ T □ W □ T ☑ Fi □ S	londay uesday /ednes hursda riday aturday unday	/ day Y					
				Opt	tionset		Cancel				

- 2. From the Task Type drop down list, select the type of task as EDI.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Weekly.
- 5. Complete the fields on the Schedule a Task: Weekly window:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Select the days you would like to Run the Task on	Select the check box for a day of the week on which you want to run the scheduled task. <u>Note:</u> You can select more than one day to run the scheduled task.
Optionset	Select the button to open the EDI Optionset window.

Cancel

Select the button to close the window without saving the changes.

6. Select the Optionset button.

The EDI Optionset window opens.

 Complete the fields on the EDI Optionset window and select the Save Settings button. The task is scheduled to run weekly on the days selected.

To Schedule an EDI Task: Monthly

1. From the View Scheduled Tasks window, select the Schedule a New Task button.

Document Diaries Fu	nds Maintenance	My Work	Policy R	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Schedu	iled Tasks								
Schedule a Task									
Task Type:		EDI							
Task Name:		EDI							
Schedule Type:		Mont	thly						
Enter the start M	ionth and othe	er details	5:						
Month:		July	×	~					
Day of Month:		2							
<u>Time: (India Standa</u>	rd Time <u>)</u>	08:00) PM						
		Opti	onset	C	ancel				

- 2. From the Task Type drop down list, select the type of task as EDI.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Monthly.
- 5. Complete the fields on the Schedule a Task: Monthly window as shown below:

Enter the start Month and other details:

Month	From the drop down list, select the month in which you want to schedule the task.
Day of Month	Enter the date on which you want to schedule the task in the selected month.
Time	Enter the start time of the scheduled task.
Optionset	Select to open the EDI Optionset window.
Cancel	Select the button to close the window without saving the changes.

6. Select the Optionset button.

The EDI Optionset window opens.

 Complete the fields on the EDI Optionset window and select the Save Settings button. The task is scheduled to run monthly.

To Schedule an EDI Task: Yearly

1. From the View Scheduled Tasks window, select the 'Schedule a New Task' button. The View Scheduled Task window opens.

Document Diar	ries Fun	ıds	Maintenance	My Work	Policy	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View	Scheduk	ed T	asks								
Schedule a	Task										
Task Type:					EDI						
Task Name:					EDI						
Schedule Typ	e:				Yearly	,					
Enter Start	Data		Time								
Enter Start	. Date a	anno	Time:								
Date:					11/10	2016					
		_	-								
Time: (India S	Standar	<u>d Ti</u>	ime)		08:00	PM					
Select the	month	5 W	au would l	ika ta D	un the	a Tack i					1
Select the	montub	s yu	Ja woala i	IKE LU K		- 10561					
					🗆 Jan	uary					
					Feb						
					Mai						
					Apr May						
					Jun						
					🗹 July						
					Aug						
					Sep						
					Dec						
					Optio	nset	Can	cel			

- 2. From the Task Type drop down list, select the type of task as EDI.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Yearly.
- 5. Complete the fields on the Schedule a Task: Yearly as shown below:

Enter Start Date and Time:

- Date Enter the start date of the scheduled task or select the date from the calendar.
- **Time** Enter the start time of the scheduled task.

Select the months you would like to Run the Task in:	Select the check box for the month in which you want to schedule the task to run. Note: You can select more than one month to schedule the task to
	run.
Optionset	Select the button to open the EDI Optionset window.
Cancel	Select the button to close the window without saving the changes.

- Select the Optionset button. The EDI Optionset window opens.
- 7. Complete the fields on the EDI Optionset window and select the Save Settings button. The task is scheduled to run yearly.

EDI Optionset window

For details regarding the EDI / Florida MED-EDI option window please refer the EDI / Florida-Med EDI User Guide

For details regarding the MED-EDI option window please refer the DA Med EDI User Guide

Scheduling SICS Tasks

To Schedule a SICS Task: One Time

- 1. From the main menu, select Utilities. The Utilities menu opens.
- From the Utilities menu, choose Tools & Designers. The Tools & Designers menu opens.
- From the Tools & Designers menu, choose Task Manager. The Task Manager menu opens.
- 4. From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.
- 5. From the View Scheduled Tasks window, select the Schedule a New Task button.

В			
uments Utiliti	es Help		
	Jurisdictional Options Managers System Parameters		
ate of C	Technicians •	Claim Type	Claim Status
10/01/2	Tools and Designers	Adjuster Transfer	Open
09/01/2010	UI Admins	Auto Diary Setup Auto Mail Merge Setup	Open
10/01/2016		Diary Utilities	Open
10/26/2015	PqrTest, MnoATest	History Tracking	Open
10/30/2015	Pqr, Mno	MCM PreFill Folder Utility	Open
10/06/2015	Pqr, Mno	Query Designer Script Editor	Open
1/05/2011	ANDERSON, ROBER	Task Manager	TM Jobs View
1/05/2011	ANDERSON, ROBER	Transaction Type Change	View Scheduled Tasks
1/02/2016	Smith, John	Checkers	Open

- 6. From the Task Type drop down list, select the type of task as SICS.
- 7. In the Task Name field, enter the name of the task.
- 8. From the Schedule Type drop down list, select the type of schedule as One Time.
- 9. Complete the fields on the Schedule a Task: One Time window as shown below:

Enter the Date and Time you would like to Run the Task on:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Optionset	Select the button to open the SICS Optionset window.
Cancel	Select the button to close the window without saving the changes.

10. Select the Optionset button.

The SICS Optionset window opens.

11. Complete the fields on the SICS Optionset window and select the Save Settings button. The task is scheduled to run one time.

Document Diaries Funds Maintenan	ce My Work Policy Reports Search Sec	urity	User Documents Utilities Help
Utilities => View Scheduled Tasks			
Task Type:		۲)
Task Name: Sub Task Name:	Policy System Update Print Check Batch Claim Balancing	*	
Schedule Type	Fraud Analytics Scheduler Auto Mail Merge Reserve Balance ISO		
	MMSEA DIS	l	
	DDS MBR	l	
	PositivePay PSO 1099-MISC DCI Reporting	l	
	CLAIM EXPORT CSStars Print Batch EOB MBR_001		
	MBR_002 SICS	•	

Schedule a Task	
Task Type:	SICS
Task Name:	SICS
SubTask Name:	None
Schedule Type:	OneTime
Enter the Date and Time you woul	d like to Run the Task on:
Date:	02/16/2017
Time: (India Standard Time)	12:34 PM
	Optionset Cancel

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To Schedule an SICS Task: Periodically

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Schedule a Task	
Task Type:	SICS
Task Name:	SICS
SubTask Name:	None
Schedule Type:	Periodically
Enter the start Date and Time:	
Date :	02/16/2017
Time : (India Standard Time)	12:34 PM
Enter the interval after which to	repeat the task:
Interval Type :	Weeks •
Interval :	2
	Optionset Cancel

- 2. From the Task Type drop down list, select the type of task as SICS.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as 'Periodically'.
- 5. Complete the fields on the Schedule a Task: Periodically as shown below:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.				
Time	Enter the start time of the scheduled task.				
Enter the interval after which to repeat the task:					
Interval Type	From the drop down list, select the type of interval after which you want to repeat the task.				
Interval	Enter the interval after which you want to repeat the task.				
Optionset	Select the button to open the SICS Optionset window.				
Cancel	Select the button to close the window without saving the changes.				

6. Select the Optionset button.

The SICS Optionset window opens.

7. Complete the fields on the SICS Optionset window and select the Save Settings button. The task is scheduled to run periodically based on the defined interval.

To Schedule an SICS Task: Weekly

8. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Schedule a Task	
Task Type: Task Name: Schedule Type:	SICS SICS Weekly
Enter Start Date and Time:	
<u>Date:</u> <u>Time: (India Standard Time)</u>	02/16/2017
Select the days you would like to	Run the Task on:
	 Monday ✓ Tuesday ✓ Wednesday Thursday Friday ✓ Saturday Sunday
	Optionset Cancel

- 9. From the Task Type drop down list, select the type of task as SICS.
- 10. In the Task Name field, enter the name of the task.
- 11. From the Schedule Type drop down list, select the type of schedule as Weekly.
- 12. Complete the fields on the Schedule a Task: Weekly window:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.		
Time	Enter the start time of the scheduled task.		
Select the days you would like to Run the Task on	Select the check box for a day of the week on which you want to run the scheduled task.		
Optionset	<u>Note:</u> You can select more than one day to run the scheduled task. Select the button to open the SICS Optionset window.		
Cancel	Select the button to close the window without saving the changes.		

13. Select the Optionset button.

The SICS Optionset window opens.

14. Complete the fields on the SICS Optionset window and select the Save Settings button. The task is scheduled to run weekly on the days selected.

To Schedule an SICS Task: Monthly

8. From the View Scheduled Tasks window, select the Schedule a New Task button.

Schedule a Task	
Task Type:	SICS
Task Name:	SICS
Schedule Type:	Monthly
Enter the start Month and othe	er details:
Month:	September •
Day of Month:	21
Time: (India Standard Time)	
	Optionset Cancel

- 9. From the Task Type drop down list, select the type of task as SICS.
- 10. In the Task Name field, enter the name of the task.
- 11. From the Schedule Type drop down list, select the type of schedule as Monthly.
- 12. Complete the fields on the Schedule a Task: Monthly window as shown below:

Enter the start Month and other details:

Month	From the drop down list, select the month in which you want to schedule the task.
Day of Month	Enter the date on which you want to schedule the task in the selected month.
Time	Enter the start time of the scheduled task.
Optionset	Select to open the SICS Optionset window.
Cancel	Select the button to close the window without saving the changes.

- 13. Select the Optionset button.
 - The SICS Optionset window opens.
- 14. Complete the fields on the SICS Optionset window and select the Save Settings button.

The task is scheduled to run monthly.

To Schedule an SICS Task: Yearly

8. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Schedule a Task	
Task Type:	SICS
Task Name:	SICS
Schedule Type:	Yearly
Enter Start Date and Time:	
Date:	02/16/2017
Time: (India Standard Time)	10:56 PM
Select the months you would like	to Run the Task in:
	 January ✓ February March April May June July ✓ Aug ✓ Sep Oct ✓ Nov Dec
	Optionset Cancel

- 9. From the Task Type drop down list, select the type of task as SICS.
- 10. In the Task Name field, enter the name of the task.
- 11. From the Schedule Type drop down list, select the type of schedule as Yearly.
- 12. Complete the fields on the Schedule a Task: Yearly as shown below:

Enter Start Date and Time:

Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Select the months you would like to	Select the check box for the month in which you want to schedule the task to run.
Run the Task in:	Note: You can select more than one month to schedule the task to run.
Optionset	Select the button to open the SICS Optionset window.

Cancel

Select the button to close the window without saving the changes.

- Select the Optionset button.
 The SICS Optionset window opens.
- 14. Complete the fields on the SICS Optionset window and select the Save Settings button. The task is scheduled to run yearly.

SICS Optionset window

Document D	Diaries Fu	nds Maintenance	e My Work	Reports	Search	Security	User Documents	Utilities	Help	
Utilities => Vie	ew Schedu	ed Tasks								0 🗙
SICS										
8										
Optionse	et Name *			File N	ame *				Export Last Run Date	
									11/13/2017	
Specify D	Date Rang	e for the Recor	ds	From	Date				To Date	
				11/13/2	017		i		03/26/2018	

Optionset Name	Enter the name of the option set. The Option Name is required.
Target File Name	Enter the name of the extract file expected. The Target File Name is required.
Export Last Run Date	This displays the date when the Export is last time run.
Specify Date Range	Check this check box if need to manually modify the date range.
Date From	The date from which the extract is expected.
Date To	The date to which the extract is expected.
Save	Click save button to save the option set.
Cancel	Click cancel to go back to the Schedule task screen.

Scheduling Automatic Clearing House (ACH) Tasks

To Schedule Automatic Clearing House (ACH) Task: One Time

- 1. From the main menu, select Utilities. The Utilities menu opens.
- 2. From the Utilities menu, choose Tools & Designers. The Tools & Designers menu opens.
- 3. From the Tools & Designers menu, choose Task Manager. The Task Manager menu opens.
- 4. From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.
- 5. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

В			
iments Utilitie	es Help		
	Jurisdictional Options Managers System Parameters		
ate of C	Technicians •	Claim Type	Claim Status
0,01/2	Tools and Designers 🔸	Adjuster Transfer	Open
09/01/2010	UI Admins	Auto Diary Setup	Open
10/01/2016		Auto Mail Merge Setup Diary Utilities	Open
10/26/2015	PqrTest, MnoATest		Open
10/30/2015	Pqr, Mno	MCM PreFill Folder Utility	Open
10/06/2015	Pqr, Mno	Query Designer	Open
1/05/2011	ANDERSON, ROBER	Script Editor Task Manager	TM Jobs View
1/05/2011	ANDERSON, ROBER	2	View Scheduled Tasks
1/02/2016	Smith, John	Checkers	Open

- 6. From the Task Type drop down list, select the type of task as ACH.
- 7. In the Task Name field, enter the name of the task.
- 8. From the Schedule Type drop down list, select the type of schedule as OneTime.
- 9. Complete the fields on the Schedule a Task: One Time as shown below:

Enter the Date and Time you would like to Run the Task on:				
Date Enter the start date of the scheduled task or select the date from the calendar.				
Time	Enter the start time of the scheduled task.			
Optionset	Select the button to open the ACH Optionset window.			
Cancel	Select the button to close the window without saving the changes.			

10. Select the Optionset button.

The ACH Optionset window opens.

11. Complete the fields on the ACH Optionset window and select the Save button. The task is scheduled to run once.

RISKMASTER			
**	Document Diaries Funds Mainte	nance My Work Reports Search	Security User Documents Utilities Help
🖃 Help	Utilities => View Scheduled Tasks		
What's New			
□ Utilities	Task Type:	ACH	•
View Scheduled Tasks		BES Scheduler	A
	Task Name:	Print Batch FROI ACORD	
	Sub Task Name:	Process Overdue Diaries Policy System Update	
	Schedule Type	Print Check Batch Claim Balancing	
		Fraud Analytics Scheduler	
		Auto Mail Merge	
		ISO	
		History Tracking Reserve Balance	
		PositivePay	
		PSO	
		Currency Exchange Interface	
		MBR	
		Print Batch EOB	
		WC Recalc Utility	
		Auto Check Batch	
		EDI	
		ACH	T

Document Diaries Funds	Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Scheduled Ta								
Schedule a Task								
Table Terrar								
Task Type:		ACH						
Task Name:		ACH						
SubTask Name:		None						
Schedule Type:		OneTir	ne					
Send Email Notificati	on Param	eter:						
Send Email Notification								
Enter the Date and Ti	ime vou w	ould lik	e to Ru	n the T	ask on:			
Date:		11/21/2	2017					
Time: (India Standard Tir	20)	15.27						
Time. (India Standard Ti	nej	15.27						
					_			
		Option	set	Cance	el 👘			

To Schedule Automatic Clearing House (ACH) Task: Periodically

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Document Diaries Funds Maintenance My Work	Reports Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks	
Schedule a Task	
Task Type:	ACH
Task Name:	ACH
SubTask Name:	None
Schedule Type:	Periodically
Send Email Notification Paramete	er:
Send Email Notification	
Send Email Notification	0
Enter the start Date and Time:	
Date :	11/21/2017
Time : (India Standard Time)	03:50 PM
	00.00111
Enter the interval after which to	repeat the task:
Interval Type :	Weeks 🔻
Interval :	2
<u>incorver</u>	٤

2. From the Task Type drop down list, select the type of task as ACH.

- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Periodically.
- 5. Complete the fields on the Schedule a Task: Periodically window as shown below:

Enter Start Date and Time:					
Date	Enter the start date of the scheduled task or select the date from the calendar.				
Time	Enter the start time of the scheduled task.				
Enter the interval after which to repeat the task:					
Interval Type	From the drop-down list, select the type of interval after which you want to repeat the task.				
Interval	Enter the interval after which you want to repeat the task.				
Optionset	Select the button to open the ACH Optionset window.				
Cancel	Select the button to close the window without saving the changes.				

- Select the Optionset button.
 The ACH Optionset window opens.
- Complete the fields on the ACH Optionset window and select the Save button. The task is scheduled to run periodically based on the defined interval.

To Schedule Automatic Clearing House (ACH) Task: Weekly

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Document Diaries Funds Maintenance My Work Report	ts Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks	
Schedule a Task	
Task Type:	ACH
Task Name:	ACH
Schedule Type:	Weekly
Send Email Notification Parameter:	
Send Email Notification	
Enter Start Date and Time:	
Date:	11/21/2017
<u>Time: (India Standard Time)</u>	05:00 PM
Select the days you would like to Run	the Task on:
	 Monday ✓ Tuesday Wednesday Thursday ✓ Friday ✓ Saturday ✓ Sunday
	Optionset Cancel

- 2. From the Task Type drop down list, select the type of task as ACH.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Weekly.
- 5. Complete the fields on the Schedule a Task: Weekly as shown below:

Enter Start Date and Time:				
Date	Enter the start date of the scheduled task or select the date from the calendar.			
Time	Enter the start time of the scheduled task.			

Select the days you would like to Run the Task on	Select the check box for a day of the week on which you want to run the scheduled task. <u>Note:</u> You can select more than one day to run the scheduled task.
Optionset	Select the button to open the ACH Optionset window.
Cancel	Select the button to close the window without saving the changes.

- Select the Optionset button. The ACH Optionset window opens.
- Complete the fields on the ACH Optionset window and select the Save button.

The task is scheduled to run weekly on the selected days.

To Schedule Automatic Clearing House (ACH) Task: Monthly

1. From the View Scheduled Tasks window, select the Schedule a New Task button.

Document Diaries	Funds	Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Sch	eduled 1	asks 🛛							
Schedule a Tas	sk								
Task Type:			ACH						
Task Name:			ACH						
Schedule Type:			Month	ly					
Send Email No	otificat	tion Param	eter:						
Send Email Notifi	cation								
Enter the star	t Moni	th and othe	er detail	s:					
Mar at he			Labe						
Month:			July	•					
Day of Month:			2						
Time: (India Star	ndard T	<u>ïme)</u>	06:39 F	PM					
			Option	set	Cance	el			

- 2. From the Task Type drop down list, select the type as ACH.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Monthly.
- 5. Complete the fields on the Schedule a Task: Monthly window as shown below:

Enter the start Month and other details				
Month	From the drop-down list, select the month in which you want to schedule the task.			
Day of Month	Enter the date on which you want to schedule the task in the selected month.			
Time	Enter the start time of the scheduled task.			
Optionset	Select to open the ACH Optionset window.			
Cancel	Select the button to close the window without saving the changes.			

6. Select the Optionset button.

The ACH Optionset window opens.

7. Complete the fields on the ACH Optionset window and select the Save button. The task is scheduled to run monthly.

To Schedule Automatic Clearing House (ACH) Task: Yearly

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Schedule a Task	
Task Type:	ACH
Task Name:	ACH
Schedule Type:	Yearly
Send Email Notification Parameter:	
Send Email Notification Parameter:	
Send Email Notification	
Enter Start Date and Time:	
Date:	11/21/2017
Select the months you would like to R	up the Tack in
Select the months you would like to k	un ule task in:
	January
	February
	March
	May
	June
	July
	🗹 Aug 🔲 Sep
	Oct
	Nov
	Dec
	Optionset Cancel
	oprovider oprovider

- 2. From the Task Type drop down list, select the type of task as ACH.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Yearly.
- 5. Complete the fields on the Schedule a Task: Yearly window as shown below:

Enter Start Date and Time:		
Date	Enter the start date of the scheduled task or select the date from the calendar.	
Time	Enter the start time of the scheduled task.	
Select the months you would like to Run the Task in:	Select the check box for the month in which you want to schedule the task to run. <u>Note:</u> You can select more than one month to schedule the task to run.	
Optionset	Select the button to open the ACH Optionset window.	
Cancel	Select the button to close the window without saving the changes.	

6. Select the Optionset button.

The ACH Optionset window opens.

 Complete the fields on the ACH Optionset window and select the Save button. The task is scheduled to run yearly.

Automatic Clearing House (ACH) Optionset window

To open, from the View Scheduled Task window, select the Optionset button.

ACH Interface			
Optionset Name *	Bank Format*	Bank Account*	File Name*
	Central Trust Bank	Choose an option -	
Manually Change Date Range	Transaction From Date *	To Date *	Line Of Business
	i i	i i	
Company Name*	Company Tax ID *	Company Discretionary Data	Company Entry Desc
Origin ACH Name *	Include Auto Payments	Test Run	

ACH Interface

Optionset Name	Enter the name of the option set. The Option Name is required.
Bank Format	From the drop-down list, select the type of bank format to schedule the task.
Bank Account	From the drop-down list, select a bank account to extract the file to.
File Name	Enter file name of the target file.
Manually Change Date Range	Select the check box if you want to manually modify the check date range. If the check box is checked, the data will be extracted based upon Transaction from Date and To Date.
Transaction From Date	Enter the Transaction From Date.
To Date	Enter the Transaction To Date.
Line of Business	Select the Line of Business.
Company Name	Enter the Company Name.
Company Tax ID	Enter the Company Tax ID.
Company Discretionary Data	Enter the Discretionary Data.

Company Entry Desc	Enter the Company Entry Desc.
Origin ACH Name	Enter the Origin ACH Name.
Include Auto Payments	Select the check box if you want to include auto payments to be extracted.
Test Run	Checkbox of Test Run is selected only to perform test job. It will not update the values in database of last run and it will not print the checks.

Scheduling Payment Update System (PUS) Tasks

To Schedule a PUS Task: One Time

- From the main menu, select Utilities. The Utilities menu opens.
- From the Utilities menu, choose Tools & Designers. The Tools & Designers menu opens.
- From the Tools & Designers menu, choose Task Manager. The Task Manager menu opens.
- 4. From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.
- 5. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

ity User Documents	Utilities Help			
	Jurisdictional Options Managers System Parameters Technicians UI Admins UI Admins UI Admins 11/30/2017 9:33 PM 11/29/2017 9:07 PM 11/23/2017 9:07 PM 11/23/2017 9:07 PM 11/23/2017 9:07 PM 11/23/2017 9:29 PM 11/29/2017 4:56 AM 11/29/2017 10:56 PM 11/29/2017 4:56 AM 11/29/2017 4:56 AM	Adjuster Transfer Auto Diary Setup Auto Mail Merge Setup Diary Utilities History Tracking MCM PreFill Folder Utility Query Designer Script Editor Task Manager Transaction Type Change	Þ	TM Jobs View View Scheduled Tasks

- 6. From the Task Type drop down list, select the type of task as PUS.
- 7. In the Task Name field, enter the name of the task.
- 8. From the Schedule Type drop down list, select the type of schedule as Onetime.
- 9. Complete the fields on the Schedule a Task: One Time as shown below:

Enter the Date and Time you would like to Run the Task on:		
Date Enter the start date of the scheduled task or select the date from the calendar.		
Time	Enter the start time of the scheduled task.	

Optionset	Select the button to open the PUS Optionset window.
Cancel	Select the button to close the window without saving the changes.

10. Select the Optionset button.

The PUS Optionset window opens.

11. Complete the fields on the PUS Optionset window and select the Save button. The task is scheduled to run once.

Document Diaries Fund	ds Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Schedule	ed Tasks							
Schedule a Task								
Task Type:		PUS						
Task Name:		PUS						
SubTask Name:								
		None						
Schedule Type:		OneTime						
Send Email Notifica	ation Parame	ter:						
Send Email Notificatio		_						
Senu Email Nouncauo	ILI							
Enter the Date an	d Time you y	ould like	to Rup	the Ta	sk on:			
	a nine you s	roulu like			sk un.			
Date:		11/23/20	117		H			
Time: (India Standard	d Time)	12:45 PM	1					
- ·								
		Options	et	Cancel	7			
		•						

To Schedule a PUS Task: Periodically

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

	e MyWork Reports Search Security UserDocuments Uti	lities Help
Utilities => View Scheduled Tasks		
Schedule a Task		
Task Type:	PUS	
Task Name:	PUS	
SubTask Name:	None	
Schedule Type:	Periodically	
Send Email Notification Param	eter:	
Send Email Notification		
Enter the start Date and Time	a.	
<u>Date :</u>	11/23/2017	
<u> Time : (India Standard Time)</u>	09:25 PM	
Enter the interval after which	to repeat the task:	
<u>Interval Type :</u>	Minutes T	
<u>Interval :</u>	15	
	Optionset Cancel	

- 2. From the Task Type drop down list, select the type of task as PUS.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as periodically.
- 5. Complete the fields on the Schedule a Task: Periodically window as shown below:

Enter Start Date and Time:			
Date	Enter the start date of the scheduled task or select the date from the calendar.		
Time	Enter the start time of the scheduled task.		
Enter the interval aft	er which to repeat the task:		
Interval Type	From the drop down list, select the type of interval after which you want to repeat the task.		

Interval	Enter the interval after which you want to repeat the task.	
Optionset	Select the button to open the PUS Optionset window.	
Cancel	Select the button to close the window without saving the changes.	

- Select the Optionset button.
 The PUS Optionset window opens.
- 7. Complete the fields on the PUS Optionset window and select the Save button. The task is scheduled to run periodically based on the defined interval.

To Schedule a PUS Task: Weekly

1. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

Document Diaries Funds Maintenanc	e My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Scheduled Tasks							
Schedule a Task							
Task Type:	PUS						
Task Name:	PUS						
Schedule Type:	Weekly						
Send Email Notification Param	eter:						
Send Email Notification							
Enter Start Date and Time:							
Date:	11/23/20)17					
<u> Time: (India Standard Time)</u>	09:12 PN	1					
Select the days you would like	te Dun t	be Teel					
Select the days you would like	e to Run t	ine task	CUN:				
	🗹 Mond 🔲 Tuesc	tay					
	UWedn						
	📃 Friday	, .					
	🔲 Satun 🔲 Sunda						
	Options	et	Cancel				
				_			

- 2. From the Task Type drop down list, select the type of task as PUS.
- 3. In the Task Name field, enter the name of the task.

- 4. From the Schedule Type drop down list, select the type of schedule as Weekly.
- 5. Complete the fields on the Schedule a Task: Weekly as shown below:

Enter Start Date and Time:			
Date	Enter the start date of the scheduled task or select the date from the calendar.		
Time	Enter the start time of the scheduled task.		

Select the days you would like to Run the Task on	Select the check box for a day of the week on which you want to run the scheduled task. <u>Note:</u> You can select more than one day to run the scheduled task.
Optionset	Select the button to open the PUS Optionset window.
Cancel	Select the button to close the window without saving the changes.

- Select the Optionset button.
 The PUS Optionset window opens.
- Complete the fields on the PUS Optionset window and select the Save button. The task is scheduled to run weekly on the selected days.

To Schedule a PUS Task: Monthly

1. From the View Scheduled Tasks window, select the Schedule a New Task button.

Document Diaries Funds Mainter	ance My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Scheduled Tasks							
Schedule a Task							
	BUG						
Task Type:	PUS						
Task Name:	PUS						
Schedule Type:	Monthly						
Send Email Notification Par	ameter:						
Send Email Notification							
Enter the start Month and	other details						
Month:	January	•					
<u>Day of Month:</u>	2						
<u> Time: (India Standard Time)</u>	09:45 PM	I					
	Options	et	Cancel				

- 2. From the Task Type drop down list, select the type as PUS.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Monthly.
- 5. Complete the fields on the Schedule a Task: Monthly window as shown below:

Enter the start Month and oth	er details
Month	From the drop down list, select the month in which you want to schedule the task.
Day of Month	Enter the date on which you want to schedule the task in the selected month.
Time	Enter the start time of the scheduled task.
Optionset	Select to open the PUS Optionset window.
Cancel	Select the button to close the window without saving the changes.

- Select the Optionset button.
 The PUS Optionset window opens.
- 7. Complete the fields on the PUS Optionset window and select the Save button. The task is scheduled to run monthly.

To Schedule a PUS Task: Yearly

Document Diaries Funds Maintenance	e MyWork Reports Search Security UserDocuments Utilities Help
Utilities => View Scheduled Tasks	
Schedule a Task	
Task Type:	PUS
Task Name:	PUS
Schedule Type:	Yearly
Send Email Notification Paramo	eter:
Send Email Notification	
Enter Start Date and Time:	
<u>Date:</u>	11/24/2017
<u> Time: (India Standard Time)</u>	12:53 PM
Select the months you would	like to Run the Task in:
	 January February March April May June July Aug Sep Oct Nov Dec
	Optionset

- 2. From the Task Type drop down list, select the type of task as PUS.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Yearly.

5. Complete the fields on the Schedule a Task: Yearly window as shown below:

Enter Start Date and	Time:
Date	Enter the start date of the scheduled task or select the date from the calendar.
TimeEnter the start time of the scheduled task.	
Select the months you would like to Run the Task in:	Select the check box for the month in which you want to schedule the task to run. <u>Note:</u> You can select more than one month to schedule the task to run.
Optionset	Select the button to open the PUS Optionset window.
Cancel	Select the button to close the window without saving the changes.

- Select the Optionset button.
 The PUS Optionset window opens.
- 7. Complete the fields on the PUS Optionset window and select the Save button. The task is scheduled to run yearly.

PUS optionset window

To open, from the View Scheduled Task window, select the Optionset button.

Document Diaries Funds Maintenance My Work	Reports Search Security User Documents	Utilities Help	
Utilities => View Scheduled Tasks			0 🗙
Payment Update System			
Optionset Name *		Select Payment Import File *	
			Q.
Update Even if Blank or Zero	Payment Detail Available		
Funds supplemental Mappings			۷

Optionset Name:	Enter the valid optionset name. This field is mandatory.
Select Payment Import File:	Browse for the required payment import file. This is a comma separated file (.csv) which is used to update payment information in RISKMASTER.
Update Even if Blank or Zero:	Check this check box if you want to update the record even if the payment import file contains the null values.
Payment Detail Available:	Check this check box if you want payment detail also. It contains the information to update the split information for the check.
Select detail import file:	Browse for the detail import file, it contains the split report of the whole payment. This field pops up after checking the payment detail available.

Document Diaries Funds Maintenance My	Work Reports Search Security User Documen	nts Utilities Help	
Utilities => View Scheduled Tasks			0 🗙
Payment Update System			
80			
Optionset Name *		Select Payment Import File *	
			Q
Update Even if Blank or Zero	Payment Detail Available	Select Detail Import File	
			Q
Funds supplemental Mappings			۷

Document Diaries Funds Maintenance MyWor	k Reports Search Security User Documents	s Utilities Help	
Utilities => View Scheduled Tasks			0
Payment Update System			
Optionset Name *		Select Payment Import File *	
			Q
Update Even if Blank or Zero	Payment Detail Available	Select Detail Import File	
			Q.
Funds supplemental Mappings			*
Funds Supp 1:	Funds Supp 2:	Funds Supp 3:	Funds Supp 4:
T	Y	Ţ	Ŧ
▲			
INT_CLAIM_TEXT LSS_HISTORY_ID	Funds Supp 6:	Funds Supp 7:	Funds Supp 8:
LSS_USER_ID	٣	٣	Ţ
NETWRK_SRVC_CODE BILL_RCVD_DATE	Funds Supp 10:	Funds Supp 11:	Funds Supp 12:
BILL_RCDMBR_DATE			
OTH_VEN_DOC_TEXT	Ŧ	Ŧ	▼
BILL_DOC_NO_TEXT BILL_REV_CM_EID	Funds Supp 14:	Funds Supp 15:	Funds Supp 16:
LSS_INVOICE_ID			
BOX_1099_CODE	Ŧ	T	v
REPORTABLECODE DeductibleFLAG	Funds Supp 18:	Funds Supp 19:	Funds Supp 20:
LSS_INV_REQ_AMT		···	
LSS_APPROVED_AMT	Y	*	Ť

Funds Supplemental Mappings: These fields are used to provide extra information in the funds supplemental table. Dropdown list is provided to choose according to the requirement.

Scheduling HR Interface Tasks

To Schedule a HR Interface: One Time

- 1. From the main menu, select Utilities. The Utilities menu opens.
- 2. From the Utilities menu, choose Tools & Designers. The Tools & Designers menu opens.
- From the Tools & Designers menu, choose Task Manager. The Task Manager menu opens.
- 4. From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.
- 5. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

3			
ments Utiliti	es Help		
	Jurisdictional Options Managers System Parameters		
ite of C	Technicians 🕨	Claim Type	Claim Status
.0/01/2	Tools and Designers 🕨	Adjuster Transfer	Open
9/01/2010	UI Admins	Auto Diary Setup	Open
0/01/2016		Auto Mail Merge Setup Diary Utilities	Open
0/26/2015	PqrTest, MnoATest	History Tracking	Open
.0/30/2015	Pqr, Mno	MCM PreFill Folder Utility	Open
0/06/2015	Pqr, Mno	Query Designer Script Editor	Open
1/05/2011	ANDERSON, ROBER	Task Manager	TM Jobs View
1/05/2011	ANDERSON, ROBER	Transaction Type Change	View Scheduled Tasks
1/02/2016	Smith, John	Checkers	Open

- 6. From the Task Type drop down list, select the type of task as HR Interface.
- 7. In the Task Name field, enter the name of the task.
- 8. From the Schedule Type drop down list, select the type of schedule as One time.
- 9. Complete the fields on the Schedule a Task: One Time as shown below:

Enter the Date and Time you w	would like to Run the Task on:
Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Optionset	Select the button to open the HR Interface Optionset window.

Cancel	Select the button to close the window without saving the
	changes.

- 10. Select the Optionset button. The HR Interface Optionset window opens.
- 11. Complete the fields on the HR Interface Optionset window and select the Save button. The task is scheduled to run once.

Document Diaries Funds	Maintenance My Work Reports Search	h S	ecurity	User Documents	Utilities	Help
Utilities => View Scheduled	Tasks					
Task Type:		•]			
Task Name:	Auto Mail Merge Reserve Balance	*				
Sub Task Name:	DCI Reporting					
	CLAIM EXPORT CSStars Currency Exchange Interface					
Schedule Type	Print Batch EOB WC Recalc Utility					
	Auto Check Batch					
	DDS 1099-MISC					
	MBR ISO					
	PositivePay					
	MMSEA DIS					
	PSO					
	SICS EDI					
	HR_INTERFACE					
	PUS	*				

Document Diaries Funds Maintena	ance My Work Reports Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks	
Schedule a Task	
Task Type:	HR_INTERFACE
Task Name:	HR_INTERFACE
SubTask Name:	None
Schedule Type:	OneTime
Send Email Notification Par Send Email Notification	rameter:
Enter the Date and Time yo	nu would like to Run the Task on:
Date:	11/17/2017
Time: (India Standard Time)	02:30 PM
	Optionset Cancel

To Schedule a HR Interface: Periodically

Document Diaries Funds Maintena	nce My Work I	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Scheduled Tasks							
Schedule a Task							
Task Type:	HR_INTER	RFACE					
Task Name:	HR_INTER	RFACE					
SubTask Name:	None						
Schedule Type:	Periodical	ly					
Send Email Notification Par	ameter:						
Send Email Notification							
Enter the start Date and Tir	ne:						
Date :	11/17/2013	7					
Time : (India Standard Time)	09:30 PM		1				
			1				
Enter the interval after whi	ch to repeat	the ta	sk:				
Interval Type :	Days 🔻						
Interval :	45						
	Optionset		Cancel				

- 2. From the Task Type drop down list, select the type of task as HR Interface.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Periodically.
- 5. Complete the fields on the Schedule a Task: Periodically window as shown below:

Enter Start Date and Time:				
Date	Enter the start date of the scheduled task or select the date from the calendar.			
Time	Enter the start time of the scheduled task.			
Enter the interval after which	h to repeat the task:			
Interval Type	From the dropdown list, select the type of interval after which you want to repeat the task.			
Interval	Enter the interval after which you want to repeat the task.			

Optionset	Select the button to open the HR Interface Optionset window.
Cancel	Select the button to close the window without saving the changes.

- 6. Select the Optionset button.
 - The HR Interface Optionset window opens.
- 7. Complete the fields on the HR Interface Optionset window and select the Save button. The task is scheduled to run periodically based on the defined interval.

To Schedule a HR Interface: Weekly

Document Diaries Funds Mainten Utilities => View Scheduled Tasks	ance My Work Reports Search Security User Documents	Utilities	Help
Schedule a Task			
Task Type:	HR_INTERFACE		
Task Name:	HR_INTERFACE		
Schedule Type:	Weekly		
Send Email Notification Pa	rameter:		
Send Email Notification			
Enter Start Date and Time:			
Date:	11/17/2017		
<u> Time: (India Standard Time)</u>	07:30 AM		
Select the days you would	like to Run the Task on:		
	Monday 🖉		
	Tuesday Wednesday		
	Thursday		
	🖉 Friday 🔲 Saturday		
	Sunday		
	Optionset Cancel		

- 2. From the Task Type drop down list, select the type of task as HR Interface.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Weekly.
- 5. Complete the fields on the Schedule a Task: Weekly as shown below:

Enter Start Date and Time:				
Date	Enter the start date of the scheduled task or select the date from the calendar.			
Time	Enter the start time of the scheduled task.			
Select the days you would like to Run the	Select the check box for a day of the week on which you want to run the scheduled task.			
Task on	Note: You can select more than one day to run the scheduled task.			
Optionset	Select the button to open the HR Interface Optionset window.			
Cancel	Select the button to close the window without saving the changes.			

6. Select the Optionset button.

The HR Interface Optionset window opens.

7. Complete the fields on the HR Interface Optionset window and select the Save button. The task is scheduled to run weekly on the selected days.

To Schedule a HR Interface: Monthly

1. From the View Scheduled Tasks window, select the Schedule a New Task button.

Document Diaries Funds M	laintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Scheduled Tas	ks							
Schedule a Task								
Task Type:	н	R_INTE	RFACE					
Task Name:	н	R_INTE	RFACE					
Schedule Type:	M	Ionthly						
Send Email Notificatio	on Parame	eters						
Send Email Notification	0							
Enter the start Month	and othe	r detail	51					
Month:	F	ebruary	•					
Day of Month:	1	7						
Time: (India Standard Tim	<u>1</u>	2:00 PM						
		Optionset	t	Cancel				

2. From the Task Type drop down list, select the type as HR Interface.

- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Monthly.
- 5. Complete the fields on the Schedule a Task: Monthly window as shown below:

Enter the start Month and other details		
Month	From the dropdown list, select the month in which you want to schedule the task.	
Day of Month	Enter the date on which you want to schedule the task in the selected month.	
Time	Enter the start time of the scheduled task.	
Optionset	Select to open the HR Interface Optionset window.	
Cancel	Select the button to close the window without saving the changes.	

- Select the Optionset button. The HR Interface Optionset window opens.
- 7. Complete the fields on the HR Interface Optionset window and select the Save button. The task is scheduled to run monthly.

To Schedule a HR Interface: Yearly

Document Diaries Funds Maintena	ance My Work Reports Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks	
Schedule a Task	
Task Type:	HR_INTERFACE
Task Name:	HR_INTERFACE
Schedule Type:	Yearly
Send Email Notification Par	rameter:
Send Email Notification	
Enter Start Date and Time:	
Date:	11/22/2017
<u> Time: (India Standard Time)</u>	
Select the months you wou	Id like to Run the Task in:
	 □ January □ February □ March □ April □ May ☞ June □ July ☞ Aug □ Sep □ Oct ☞ Nov □ Dec
	Optionset

- 2. From the Task Type drop down list, select the type of task as HR Interface.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Yearly.
- 5. Complete the fields on the Schedule a Task: Yearly window as shown below:

Enter Start Date and Time:				
Date	Enter the start date of the scheduled task or select the date from the calendar.			
Time	Enter the start time of the scheduled task.			
Select the months you would like to	Select the check box for the month in which you want to schedule the task to run.			
Run the Task in:	Note: You can select more than one month to schedule the task to run.			
Optionset	Select the button to open the HR Interface Optionset window.			
Cancel	Select the button to close the window without saving the changes.			

- Select the Optionset button.
 The HR Interface Optionset window opens.
- 7. Complete the fields on the HR Interface Optionset window and select the Save button. The task is scheduled to run yearly.

HR Interface Optionset window

For details regarding the HR Interface Optionset window please refer HR Interface User Guide.

Scheduling C.L.U.E. Tasks

To Schedule a CLUE: One Time

- From the main menu, select Utilities. The Utilities menu opens.
- 2. From the Utilities menu, choose Tools & Designers. The Tools & Designers menu opens.
- From the Tools & Designers menu, choose Task Manager. The Task Manager menu opens.
- 4. From the Task Manager menu, choose View Scheduled Tasks. The View Schedule Task window opens.
- 5. From the View Scheduled Tasks window, select the Schedule a New Task button. The View Scheduled Task window opens.

В			
iments Utiliti	es Help		
	Jurisdictional Options Managers System Parameters		
ate of C	Technicians	Claim Type	Claim Status
10/01/2	Tools and Designers	Adjuster Transfer	Open
09/01/2010	UI Admins	 Auto Diary Setup 	Open
0/01/2016		Auto Mail Merge Setup Diary Utilities	Open
10/26/2015	PqrTest, MnoATes	t History Tracking	Open
10/30/2015	Pqr, Mno	MCM PreFill Folder Utility	Open
10/06/2015	Pqr, Mno	Query Designer	Open
1/05/2011	ANDERSON, ROBE	Script Editor R Task Manager	TM Jobs View
1/05/2011	ANDERSON, ROBE	2	View Scheduled Tasks
1/02/2016	Smith, John	Checkers	Open

- 6. From the Task Type drop down list, select the type of task as CLUE.
- 7. In the Task Name field, enter the name of the task.
- 8. From the Schedule Type drop down list, select the type of schedule as One time.
- 9. Complete the fields on the Schedule a Task: One Time as shown below:

Enter the Date and Time you would like to Run the Task on:			
Date Enter the start date of the scheduled task or select the date from the calendar.			
Time	Enter the start time of the scheduled task.		
Optionset	Select the button to open the CLUE Optionset window.		
Cancel	Select the button to close the window without saving the changes.		

10. Select the Optionset button.

The CLUE Optionset window opens.

11. Complete the fields on the CLUE Optionset window and select the Save button. The task is scheduled to run once.

Document Diaries Funds Main	tenance My Work Reports Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks	
Task Type:	τ
Task Name:	Process WPA Diaries
Sub Task Name:	Financial History Processing Billing Scheduler
Schedule Type	BES Scheduler History Tracking Print Batch FROI ACORD Process Overdue Diaries Policy System Update Print Check Batch ISO Claim Balancing Fraud Analytics Scheduler Auto Mail Merge Reserve Balance WC Recalc Utility Print Batch EOB Auto Check Batch
	CLUE

Document	Diaries	Funds	Maintenance	My Work	Reports	Search	Security	User Documents	Utilities	Help
Utilities =>	View Sch	eduled 1	Tasks							
Schedul	e a Tas	sk								
Task Type				CLUE						
Task Nam	ie:			CLUE						
SubTask I	Name:			None						
Schedule	Туре:			OneTir	ne					
Cond F	nail Ne	tificat	tion Param	otory						
Send El	nan Nu	Dunica	uon Parani	eter.						
Send Ema	ail Notifi	cation								
Enter t	he Date	e and 1	Time you w	ould lik	e to Ru	n the T	ask on:			
Date:				04/11/2	2018					
<u>Time: (In</u>	dia Star	ndard T	ïme)	10:22 F	РМ					
			,							
				Option	set	Cance	el			

To Schedule a CLUE: Periodically

Document Diaries Funds Maintenance My V	Nork Re	eports	Search	Security	User Documents	Utilities	Help
Utilities => View Scheduled Tasks							
Schedule a Task							
Task Type:	CLUE	-					
Task Name:	CLUE	-					
SubTask Name:		-					
	None		L.				
Schedule Type:	Perio	dical	Iy				
Send Email Notification Parameter	r:						
Send Email Notification							
Enter the start Date and Time:							
		_					
Date :	04/10)/2018	В				
<u> Time : (India Standard Time)</u>	11:11	L AM					
Enter the interval after which to re	epeat t	the ta	isk:				
Interval Type :	Days	•					
Interval :	12						
	Optic	onset		Cancel			

- 2. From the Task Type drop down list, select the type of task as CLUE.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Periodically.
- 5. Complete the fields on the Schedule a Task: Periodically window as shown below:

Enter Start Date and Time:				
Date	Enter the start date of the scheduled task or select the date from the calendar.			
Time	Enter the start time of the scheduled task.			
Enter the interval after which to repeat the task:				
Interval Type	From the dropdown list, select the type of interval after which you want to repeat the task.			
Interval	Enter the interval after which you want to repeat the task.			
Optionset	Select the button to open the CLUE Optionset window.			
Cancel	Select the button to close the window without saving the changes.			

- Select the Optionset button. The CLUE Optionset window opens.
- 7. Complete the fields on the CLUE Optionset window and select the Save button. The task is scheduled to run periodically based on the defined interval.

To Schedule a CLUE: Weekly

Document Diaries Funds Maintenance My	Work Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Scheduled Tasks						
Schedule a Task						
Task Type:	CLUE					
Task Name:	CLUE					
Schedule Type:	Weekly					
Schedule Type.	Weekly					
Send Email Notification Paramete	r:					
Send Email Notification						
Send Email Nouncation						
Enter Start Date and Time:						
Date:	04/03/201	8				
Time: (India Standard Time)	11:23 PM					
^						
Select the days you would like to	Run the Ta	sk on:				
	Monday	,				
	🗆 Tuesda	y				
	Wednes					
	Friday	ау				
	Saturda					
	Sunday	,				
	Optionset		Cancel			

- 2. From the Task Type drop down list, select the type of task as CLUE.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Weekly.
- 5. Complete the fields on the Schedule a Task: Weekly as shown below:

Enter Start Date and Time:				
Date	Enter the start date of the scheduled task or select the date from the calendar.			
Time	Enter the start time of the scheduled task.			
Select the days you would like to Run the Task on	Select the check box for a day of the week on which you want to run the scheduled task. <u>Note:</u> You can select more than one day to run the scheduled task.			
Optionset	Select the button to open the CLUE Optionset window.			
Cancel	Select the button to close the window without saving the changes.			

- 6. Select the Optionset button.
 - The CLUE Optionset window opens.
- 7. Complete the fields on the CLUE Optionset window and select the Save button.

The task is scheduled to run weekly on the selected days.

To Schedule a CLUE: Monthly

1. From the View Scheduled Tasks window, select the Schedule a New Task button.

Document Diaries Funds Maintenance My	Work Reports	Search	Security	User Documents	Utilities	Help
Utilities => View Scheduled Tasks						
Schedule a Task						
Task Type:	CLUE					
Task Name:	CLUE					
Schedule Type:	Monthly					
Send Email Notification Paramete	er:					
Send Email Notification						
Send Email Notification						
Enter the start Month and other o	letails:					
Month:	January	T				
Day of Month:	3					
Time: (India Standard Time)	11:23 PM					
	Optionset		Cancel			

- 2. From the Task Type drop down list, select the type as CLUE.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Monthly.
- 5. Complete the fields on the Schedule a Task: Monthly window as shown below:

Enter the start Month and other details				
Month	From the dropdown list, select the month in which you want to schedule the task.			
Day of Month	Enter the date on which you want to schedule the task in the selected month.			
Time	Enter the start time of the scheduled task.			
Optionset	Select to open the CLUE Optionset window.			
Cancel	Select the button to close the window without saving the changes.			

6. Select the Optionset button.

The CLUE Optionset window opens.

7. Complete the fields on the CLUE Optionset window and select the Save button. The task is scheduled to run monthly.

To Schedule a CLUE: Yearly

Document Diarles Funds Maintenance My Work	Reports Search Securit	y User Documents	Utilities Help
Utilities => View Scheduled Tasks			
Task Type:	CLUE		
Task Name:	CLUE		
Schedule Type:	Yearly		
Send Email Notification Parameter:			
Send Email Notification			
Enter Start Date and Time:			
Date:	04/11/2018		
<u>Time: (India Standard Time)</u>	10:22 PM		
Select the months you would like to Ru	ın the Task in:		
	 January February March ✓ April May June July ✓ Aug Sep Oct Nov Dec 		
	Optionset	Cancel	

- 2. From the Task Type drop down list, select the type of task as CLUE.
- 3. In the Task Name field, enter the name of the task.
- 4. From the Schedule Type drop down list, select the type of schedule as Yearly.
- 5. Complete the fields on the Schedule a Task: Yearly window as shown below:

Enter Start Date	Enter Start Date and Time:				
Date	Enter the start date of the scheduled task or select the date from the calendar.				
Time	Enter the start time of the scheduled task.				
Select the months you would like to Run the Task in:	Select the check box for the month in which you want to schedule the task to run. <u>Note:</u> You can select more than one month to schedule the task to run.				
Optionset	Select the button to open the CLUE Optionset window.				
Cancel	Select the button to close the window without saving the changes.				

- Select the Optionset button.
 The CLUE Optionset window opens.
- 7. Complete the fields on the CLUE Optionset window and select the Save button. The task is scheduled to run yearly.

C.L.U.E. Optionset window

For details regarding the CLUE Optionset window please refer C.L.U.E User Guide.