Data Exchange Products User Guide

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

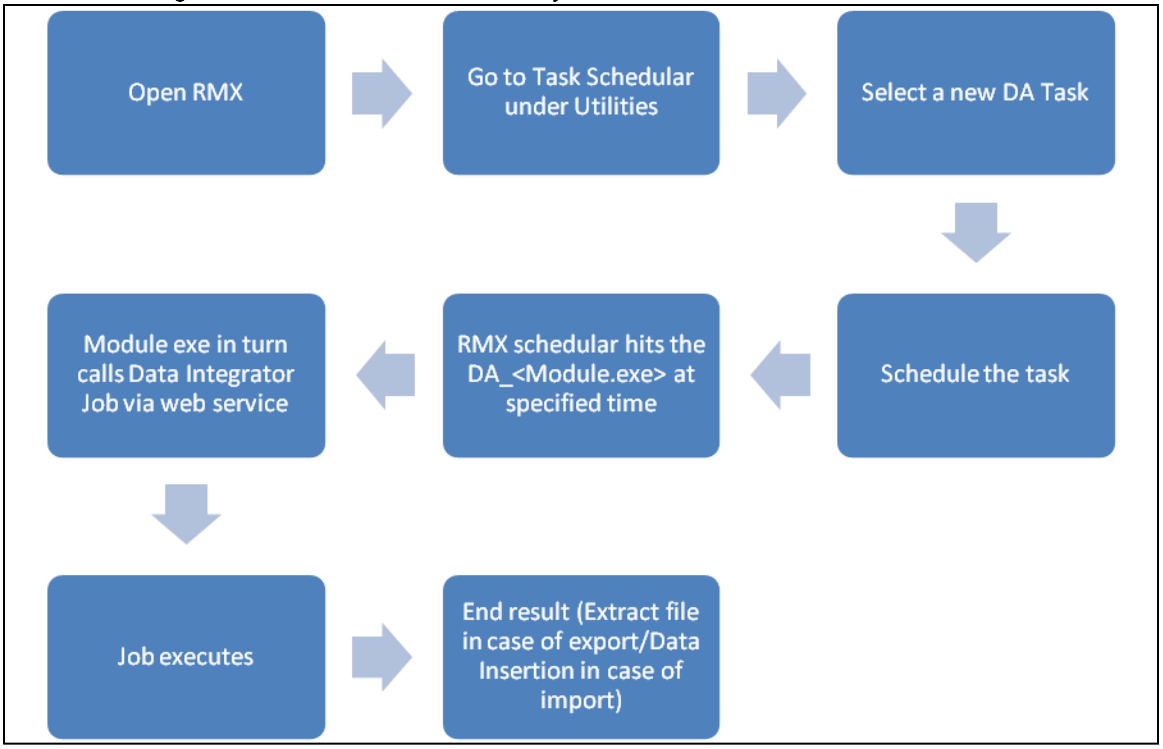
For setting up and using RISKMASTER Data Analytics you need the following components:

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

Working with the Task Manager

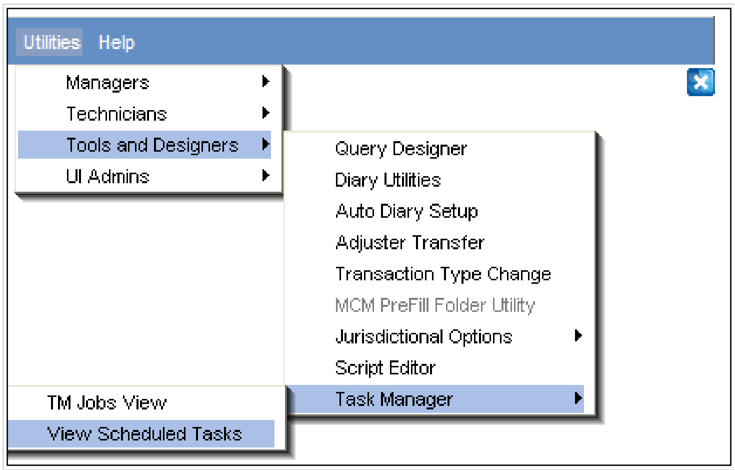
To Set up a Data Analytics Job

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

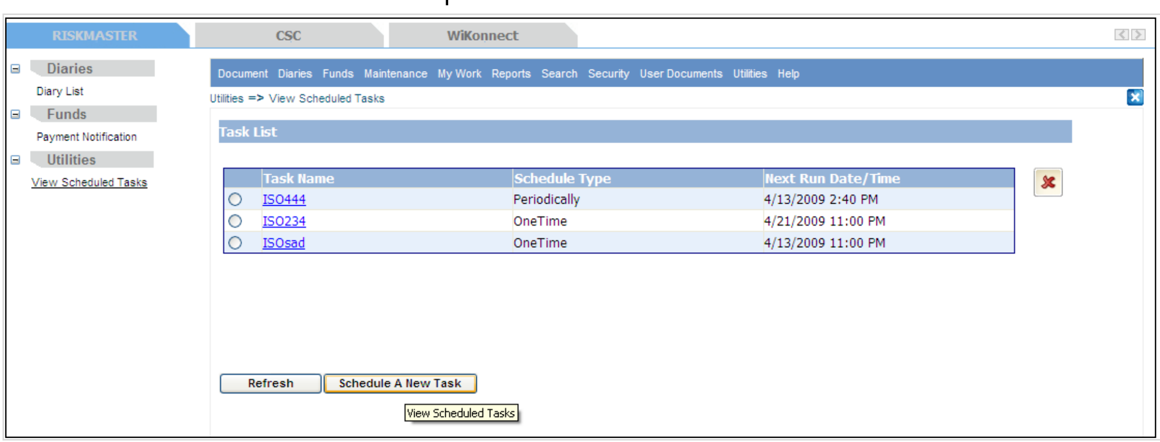


To Schedule a Data Analytics Job

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.

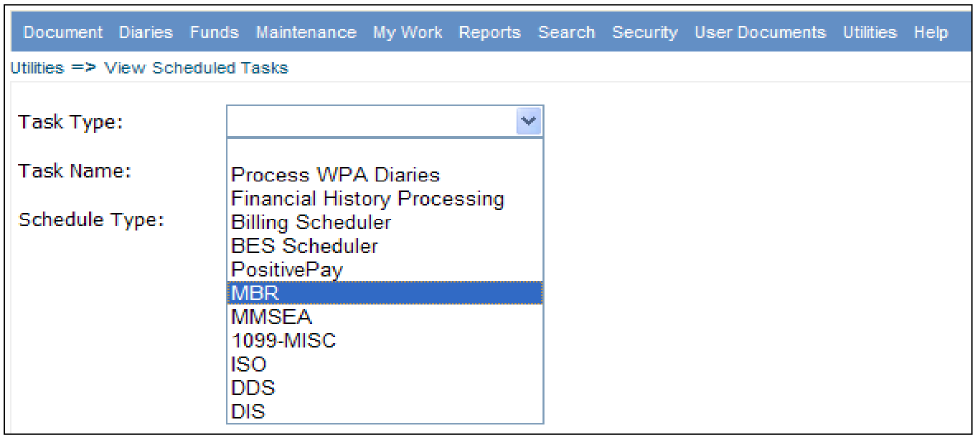


3. From the Tools and Designers menu, choose Task Manager.
   The Task Manager Menu opens.
4. From the Task Manager menu, choose View Scheduled Tasks.
   The View Scheduled Tasks window opens.

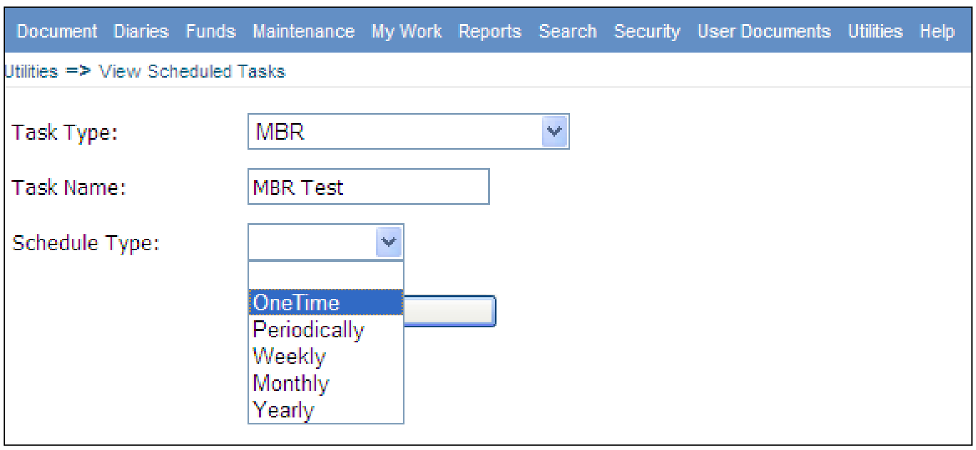


This window shows all previously scheduled tasks and lets you schedule new tasks.

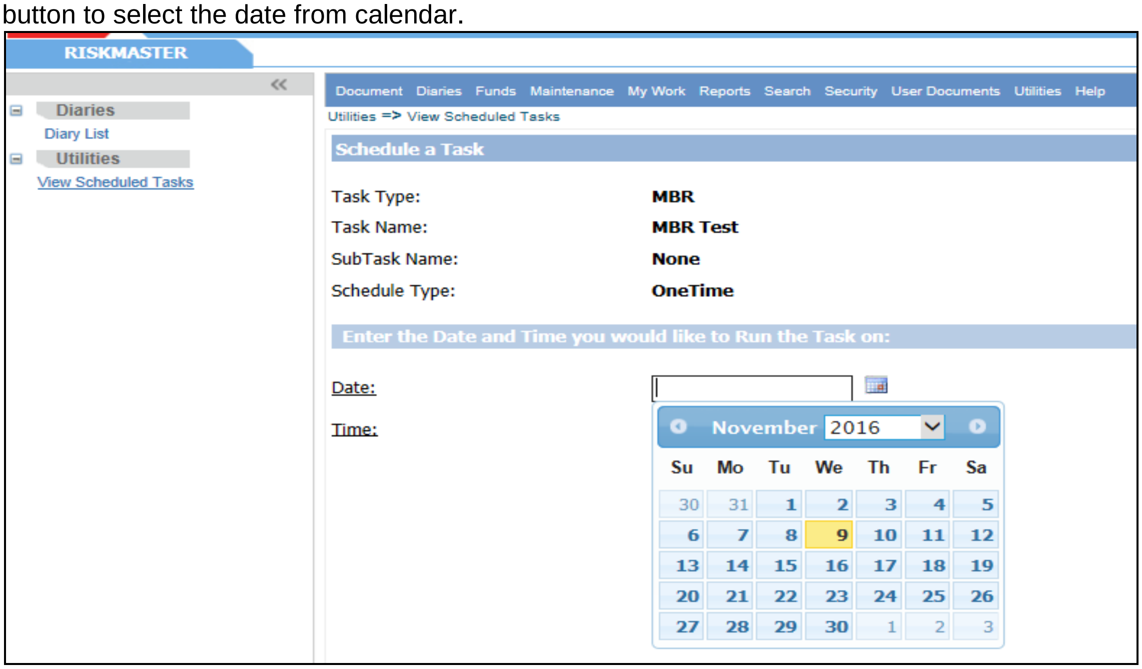
5. On the View Scheduled Tasks window, select the Schedule a New Task button.
   The New Task window opens.
6. From the Task Type drop down list, select the appropriate task type.



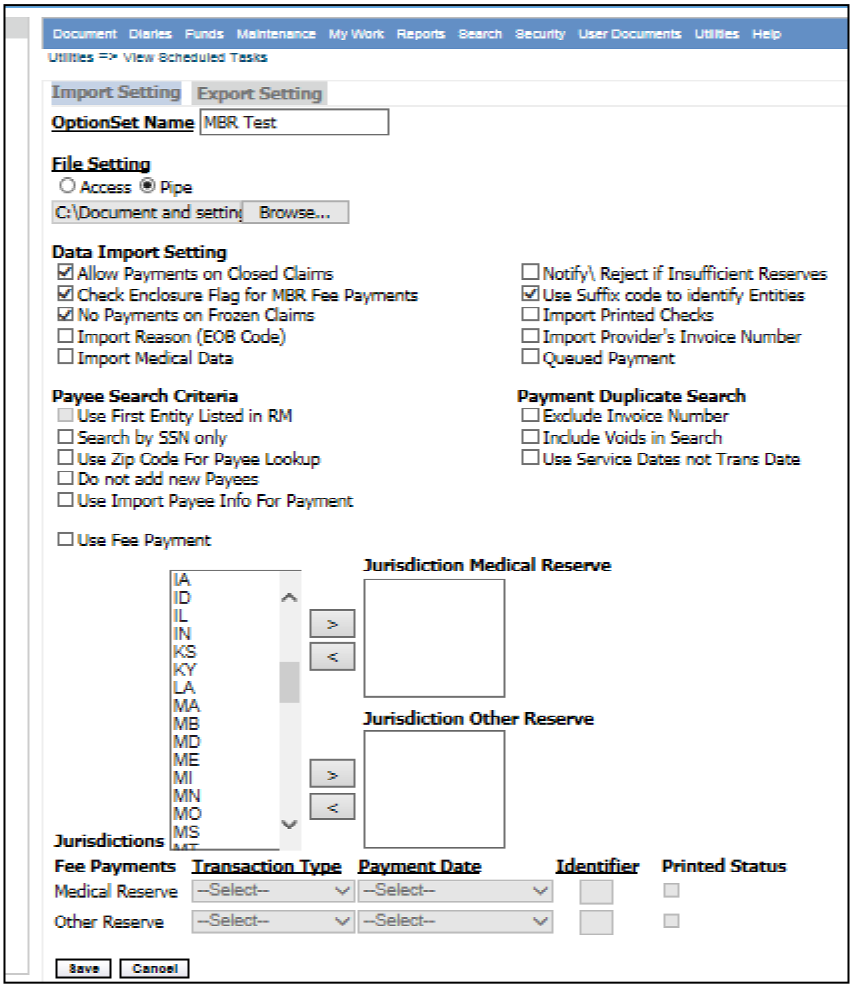
7. In the Task Name field enter the task name.



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.



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).

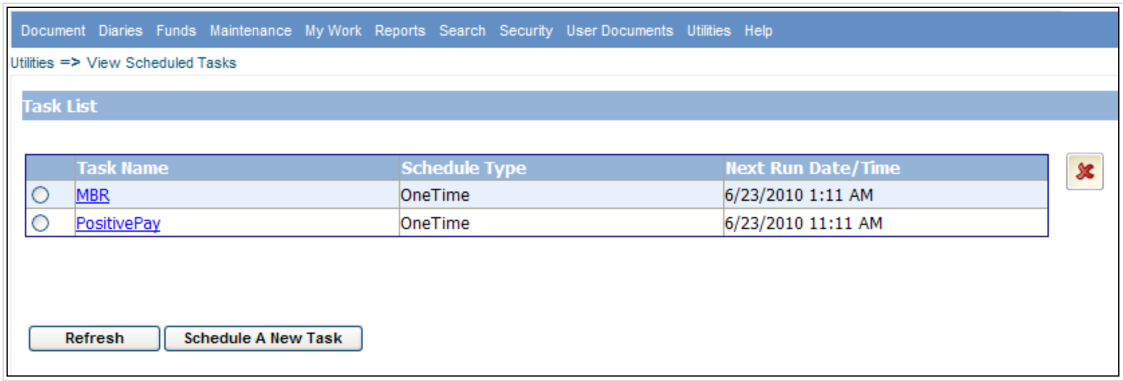


12. Complete the fields on the <module> settings window and save the job.
13. You have successfully scheduled a job using the Task Manager.
    The Task Manager will run your DA job (DA_Module.exe) at the specified time and according to schedule. The DA_Module.exe in turn will call the Data Integrator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



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.

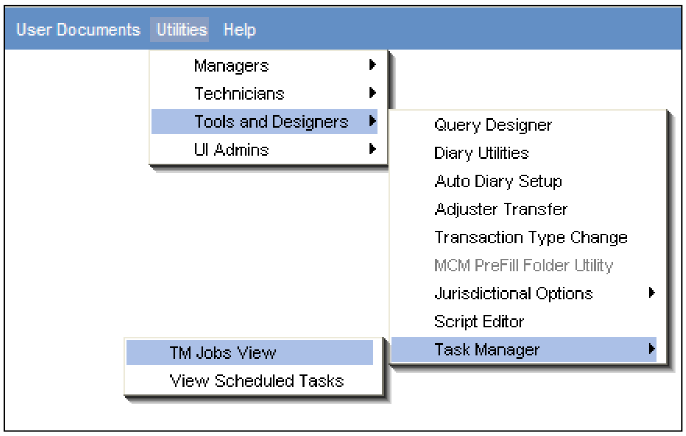
   A confirmation window opens and displays the message.
2. Select the 'OK' button from the window.

   The task no longer lists in the Task List section.

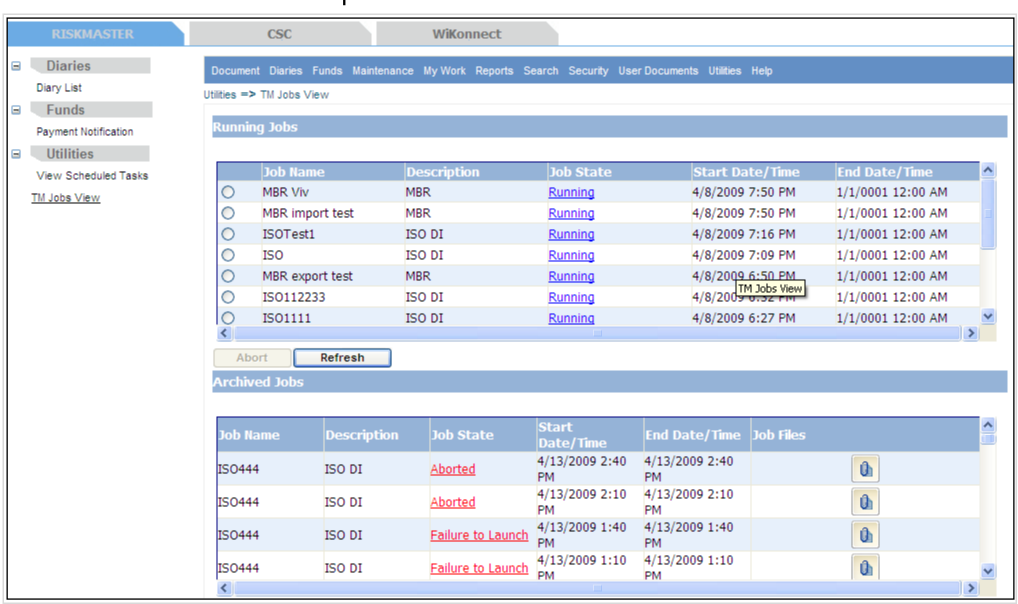
To Track Scheduled Jobs in Task Manager

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.



- 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.
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 TM Jobs View.
   The TM Jobs View window opens.

To View Scheduled Tasks

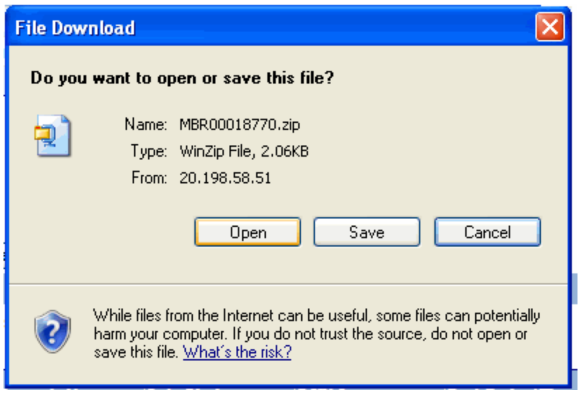
Use the View Scheduled Tasks window to view jobs that are scheduled to run.

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.

To View Job Files

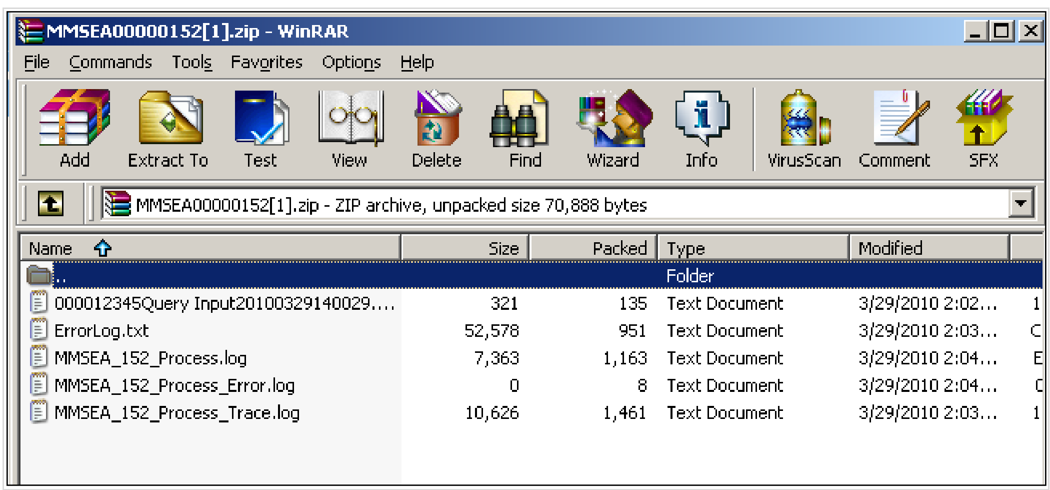
1. In the Archived Jobs section, from the Job Files column, select the  button next to the job for which you want to view the job output.

   The File Download window opens.



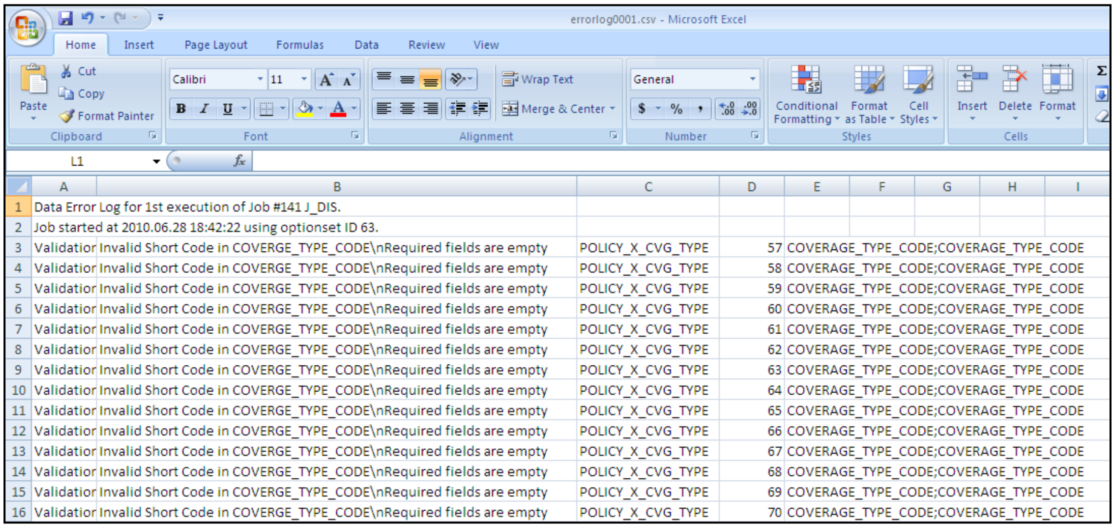
2. Select the 'Open' button to unzip the file or select the Save button to save file for future references.

   If you selected Open, the unzip window opens.



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.

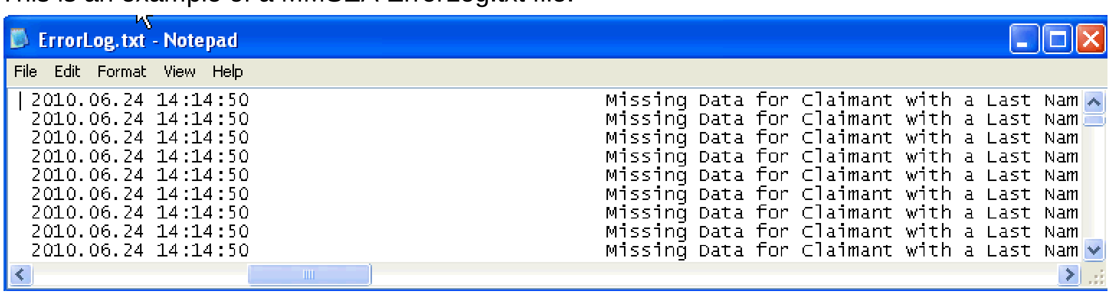
This is an example of a DIS errorlog.csv file.



	A	B	C	D	E
1	Data Error Log for 1st execution of Job #141 J_DIS.				
2	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	57	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
4	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	58	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
5	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	59	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
6	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	60	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
7	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	61	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
8	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	62	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
9	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	63	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
10	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	64	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
11	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	65	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
12	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	66	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
13	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	67	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
14	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	68	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
15	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	69	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
16	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	70	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE

- ErroLog.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

```
2010.06.24 14:14:50          Missing Data for Claimant with a Last Nam
2010.06.24 14:14:50          Missing Data for Claimant with a Last Nam
2010.06.24 14:14:50          Missing Data for Claimant with a Last Nam
2010.06.24 14:14:50          Missing Data for Claimant with a Last Nam
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2010.06.24 14:14:50          Missing Data for Claimant with a Last Nam
2010.06.24 14:14:50          Missing Data for Claimant with a Last Nam
```

- 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

```
+DF_DIS_TRANSFORM_XML/DATA_INTEGRATOR2, STOP, 1, 0.000, 35.265
/DF_DIS_TRANSFORM_XML/Q_Get_XML-Mapping1, STOP, 1, 0.000, 35.265
/DF_DIS_TRANSFORM_XML/Q_Get_XML-Mapping3, STOP, 1, 0.000, 35.265
/DF_DIS_TRANSFORM_XML/Q_Get_XML-Function4, STOP, 1, 0.016, 35.265
/DF_DIS_TRANSFORM_XML/Q_Get_XML, STOP, 1, 0.000, 35.265
/DF_DIS_TRANSFORM_XML/Q_Extract_optionset, STOP, 1, 0.000, 35.265
-DF_DIS_TRANSFORM_XML/Q_Extract_optionset_DIS_OPTIONSET, STOP, 1, 0.141, 35.296
+DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/Q_EMPD_GET, STOP, 1, 0.000, 38.312
/DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/Pivot, STOP, 1, 0.000, 38.312
/DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/Q_EMPD_CODES_LIST-Mapping1, STOP, 1, 0.000, 38.312
/DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/Q_EMPD_CODES_LIST-Distinct2, STOP, 1, 0.000, 38.312
/DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/Q_EMPD_CODES_LIST, STOP, 1, 0.016, 38.312
/DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/VD_AVOID_CODE_DUPLICATION, STOP, 1, 0.015, 38.312
+DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/Q_EMPV_GET, STOP, 1, 0.000, 38.312
/DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/Pivot[1], STOP, 1, 0.000, 38.312
/DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/Q_EMPV_CODES_LIST-Mapping3, STOP, 1, 0.000, 38.312
/DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/Q_EMPV_CODES_LIST-Distinct4, STOP, 1, 0.000, 38.312
/DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/Q_EMPV_CODES_LIST, STOP, 1, 0.000, 38.312
/DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/VD_AVOID_CODE_DUPLICATION[1], STOP, 1, 0.015, 38.312
+DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/Q_EMP_GET, STOP, 1, 0.000, 38.312
/DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/Pivot[2], STOP, 1, 0.000, 38.312
/DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/Q_EMP_CODES_LIST-Mapping5, STOP, 7, 0.000, 38.312
/DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/Q_EMP_CODES_LIST-Distinct6, STOP, 7, 0.000, 38.312
/DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/Q_EMP_CODES_LIST, STOP, 7, 0.000, 38.312
/DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/VD_AVOID_CODE_DUPLICATION[2], STOP, 7, 0.015, 38.312
/DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/Merge: 0, STOP, 9, 0.000, 38.312
/DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/Q_SET_PRIMARY_KEY, STOP, 9, 0.000, 38.312
/DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/Map_Operation, STOP, 9, 0.000, 38.312
-DF_DIS_GET_DISTINCT_CODE_EMPLOYEES/MO_INSERT_UNIQUE_CODE, STOP, 9, 0.016, 38.343
+DF_UPDATE_CODE_ID/UNIQUE_CODE, STOP, 9, 0.000, 40.500
/DF_UPDATE_CODE_ID/Q_GET_CODE_TABLE_ID-Mapping1, STOP, 9, 0.000, 40.500
/DF_UPDATE_CODE_ID/Q_GET_CODE_TABLE_ID-Function2, STOP, 9, 0.015, 40.500
/DF_UPDATE_CODE_ID/Q_GET_CODE_TABLE_ID, STOP, 9, 0.016, 40.500
/DF_UPDATE_CODE_ID/Query-Mapping3, STOP, 9, 0.000, 40.500
/DF_UPDATE_CODE_ID/Query-Function4, STOP, 9, 0.187, 40.500
/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.

DIS_161_Process_Error.log - Notepad

File Edit Format View Help

```
(12.2) 06-25-10 02:18:10 (W) (3500:2304) RUN-051011: |Dataflow DF_DIS_IMPORT_POLICIES
                                                      Warning: Rows per commit for table loader has been reset to 1 b
 (12.2) 06-25-10 02:18:10 (W) (3500:2304) RUN-051011: |Dataflow DF_DIS_IMPORT_POLICIES
                                                      Warning: Rows per commit for table loader has been reset to 1 b
 (12.2) 06-25-10 02:18:14 (W) (3768:1660) RUN-051011: |Dataflow DF_DIS_IMPORT_POLICIES_PCVG_PID
                                                      Warning: Rows per commit for table loader has been reset to 1 b
```

- 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
                                               <12.2.2.0000>.
(12.2) 06-08-10 18:17:17 (2340:1972)      JOB: Current directory of job <3b3476e9_0f47_4cb0_9f73_cb59d68560dc> is <C:\Progra
                                               Services\bin>.
(12.2) 06-08-10 18:17:17 (2340:1972)      JOB: Starting job on job server host <DA2QA>, port <3500>.
(12.2) 06-08-10 18:17:18 (2340:1972)      JOB: Job <J_DIS> of runid <20100608181717234O1972> is initiated by user <SYSTEM>.
(12.2) 06-08-10 18:17:18 (2340:1972)      JOB: Processing job <J_DIS>.
(12.2) 06-08-10 18:17:48 (2340:1972)      JOB: Optimizing job <J_DIS>.
(12.2) 06-08-10 18:17:48 (2340:1972)      JOB: Job <J_DIS> is started.
(12.2) 06-08-10 18:17:48 (2340:1972) WORKFLOW: Work flow <WF_DIS_READ_OPTIONSET> is started.
(12.2) 06-08-10 18:17:50 (2340:1972) WORKFLOW: Work flow <WF_DIS_LOAD_OPTIONSET> is started.
(12.2) 06-08-10 18:17:50 (0768:2780) DATAFLOW: Process to execute data flow <DF_DIS_TRANSFORM_XML> is started.
(12.2) 06-08-10 18:17:51 (0768:2780) DATAFLOW: The specified locale <eng_us.cp1252> has been coerced to <Unicode (UTF-16)> f
                                               datastore <DIS> obtains data in <UTF-8> codepage.
(12.2) 06-08-10 18:17:51 (0768:2780)      JOB: Initializing transcoder for datastore <DS_RMDB> to transcode between engine c
                                               <<DEFAULT>>
(12.2) 06-08-10 18:17:51 (0768:2780)      JOB: Initializing transcoder for datastore <DS_RMX_STAGING> to transcode between e
                                               codepage <<DEFAULT>>
(12.2) 06-08-10 18:17:51 (0768:2780) DATAFLOW: Data flow <DF_DIS_TRANSFORM_XML> is started.
(12.2) 06-08-10 18:17:51 (0768:2780) DATAFLOW: Cache statistics determined that data flow <DF_DIS_TRANSFORM_XML> uses <0> ca
                                               than(or equal to) the virtual memory <1598029824> bytes available for caches.
                                               MEMORY.
(12.2) 06-08-10 18:17:51 (0768:2780) DATAFLOW: Data flow <DF_DIS_TRANSFORM_XML> using IN MEMORY Cache.
(12.2) 06-08-10 18:17:52 (0768:2780) DATAFLOW: Data flow <DF_DIS_TRANSFORM_XML> is completed successfully.
(12.2) 06-08-10 18:17:52 (0768:2780) DATAFLOW: Process to execute data flow <DF_DIS_TRANSFORM_XML> is completed.
(12.2) 06-08-10 18:17:52 (2340:1972) WORKFLOW: Work flow <WF_DIS_LOAD_OPTIONSET> is completed successfully.
(12.2) 06-08-10 18:17:52 (2340:1972) WORKFLOW: Work flow <WF_DIS_READ_OPTIONSET> is completed successfully.
(12.2) 06-08-10 18:17:52 (2340:1972) WORKFLOW: Work flow <WF_DIS_READ_DATA> is started.
(12.2) 06-08-10 18:17:52 (2340:1972) WORKFLOW: Work flow <WF_DIS_GET_DISTINCT_CODE> is started.
(12.2) 06-08-10 18:17:53 (2544:2164) DATAFLOW: Process to execute data flow <DF_DIS_GET_DISTINCT_CODE_EMPLOYEES> is started.
(12.2) 06-08-10 18:17:54 (2544:2164) DATAFLOW: Data flow <DF_DIS_GET_DISTINCT_CODE_EMPLOYEES> is started.
(12.2) 06-08-10 18:17:54 (2544:2164) DATAFLOW: Cache statistics for data flow <DF_DIS_GET_DISTINCT_CODE_EMPLOYEES> are not a
                                               be collected before they can be used.
(12.2) 06-08-10 18:17:54 (2544:2164) DATAFLOW: Data flow <DF_DIS_GET_DISTINCT_CODE_EMPLOYEES> using PAGEABLE Cache with <153
(12.2) 06-08-10 18:17:55 (2544:2164) DATAFLOW: Data flow <DF_DIS_GET_DISTINCT_CODE_EMPLOYEES> is completed successfully.
(12.2) 06-08-10 18:17:55 (2544:2164) DATAFLOW: Process to execute data flow <DF_DIS_GET_DISTINCT_CODE_EMPLOYEES> is complete
```

- 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.

```
000012345Query Input20100329140029.txt - Notepad
File  Edit  Format  View  Help
H000001234 5NGHQ20100329
                    Smith J19721107211111111 1
                    Trent M20011105044444444 4
                    Lewis M19420205155555555 5
                    RodrigS19560515133333333 3
                    RaymonS19780909022222222 2
T000001234 5NGHQ201003290000000005
```

- 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.

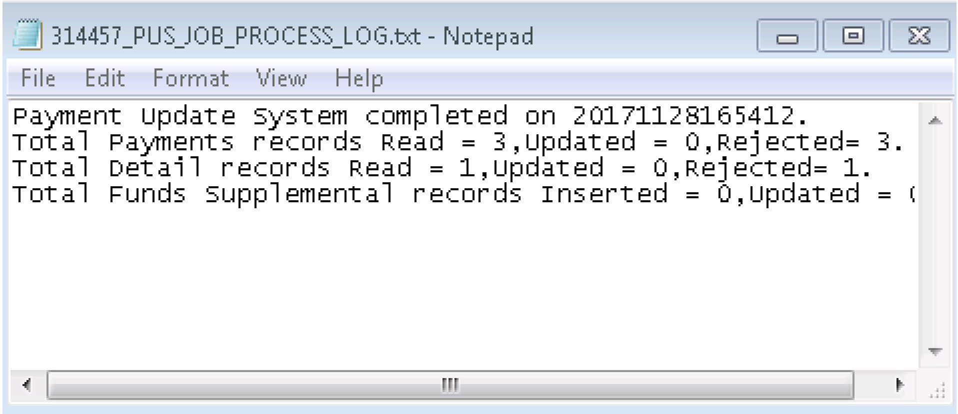
The Balanced Financials section lists all Claim Numbers where the financials were updated based on the payments that were imported. In this Example, the Reserve Current financials were updated for Claim Numbers 2011055001, 2011055002, and 2011055003.

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: XXXXX7239
PAYEE added to Riskmaster. Last Name: Orthopedic Group of Austin, First Name: , Tax Id: XXXXX8021
Successfully transferred 3 records from HEADER table
Successfully transferred 11 records from LINEITEM 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 Trans Split Table: Line Item Number: 1, Trans_Type_Code: DB, Amount 142.08
Payment Imported into Riskmaster Funds Trans Split Table: Line Item Number: 2, Trans_Type_Code: DB, 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
```

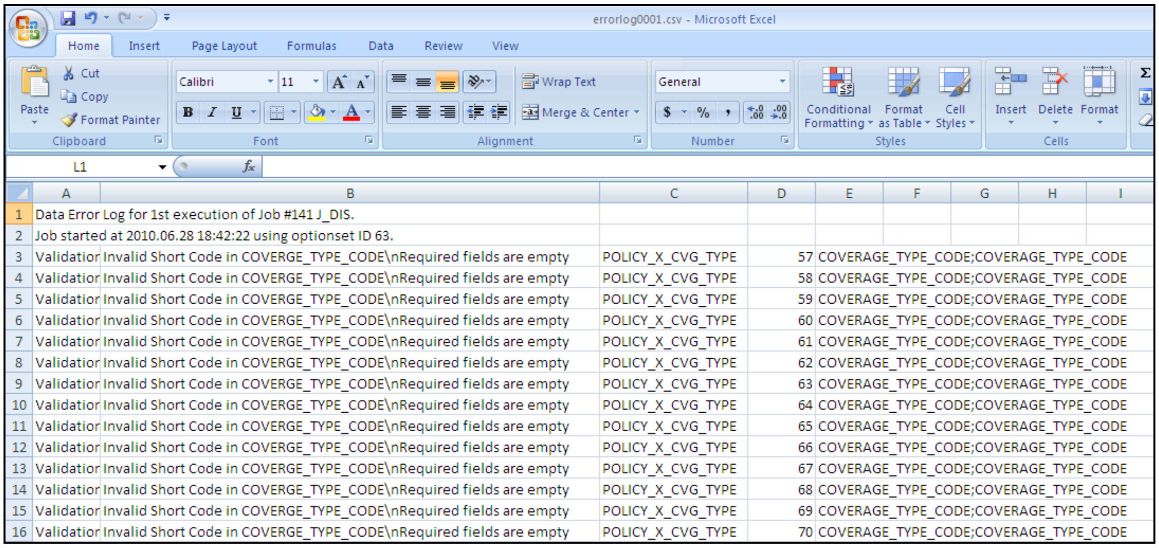
- PUS_JOB_PROCESS_Log.txt- This file will be generated when you executed the job. It will contain the information regarding how many rows have been affected after its execution.




```
Payment Update System completed on 20171128165412.
Total Payments records Read = 3,Updated = 0,Rejected= 3.
Total Detail records Read = 1,Updated = 0,Rejected= 1.
Total Funds Supplemental records Inserted = 0,Updated = (
```

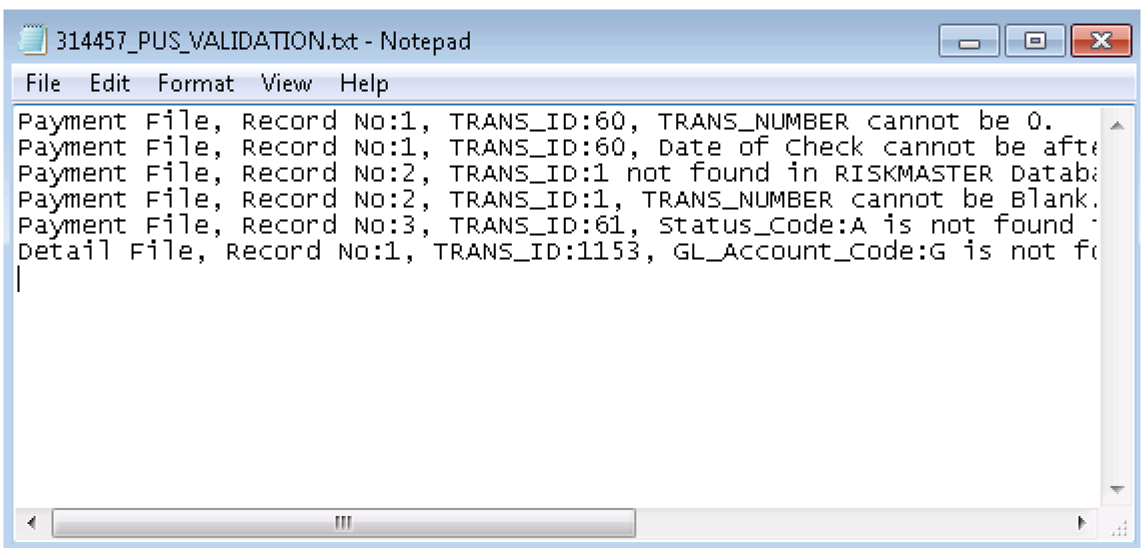
To View Validation Errors

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.



	A	B	C	D	E
1	Data Error Log for 1st execution of Job #141 J_DIS.				
2	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	57	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
4	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	58	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
5	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	59	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
6	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	60	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
7	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	61	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
8	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	62	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
9	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	63	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
10	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	64	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
11	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	65	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
12	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	66	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
13	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	67	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
14	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	68	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
15	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	69	COVERAGE_TYPE_CODE;COVERAGE_TYPE_CODE
16	Validatior	Invalid Short Code in COVERGE_TYPE_CODE\nRequired fields are empty	POLICY_X_CVG_TYPE	70	COVERAGE_TYPE_CODE;COVERAGE_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.



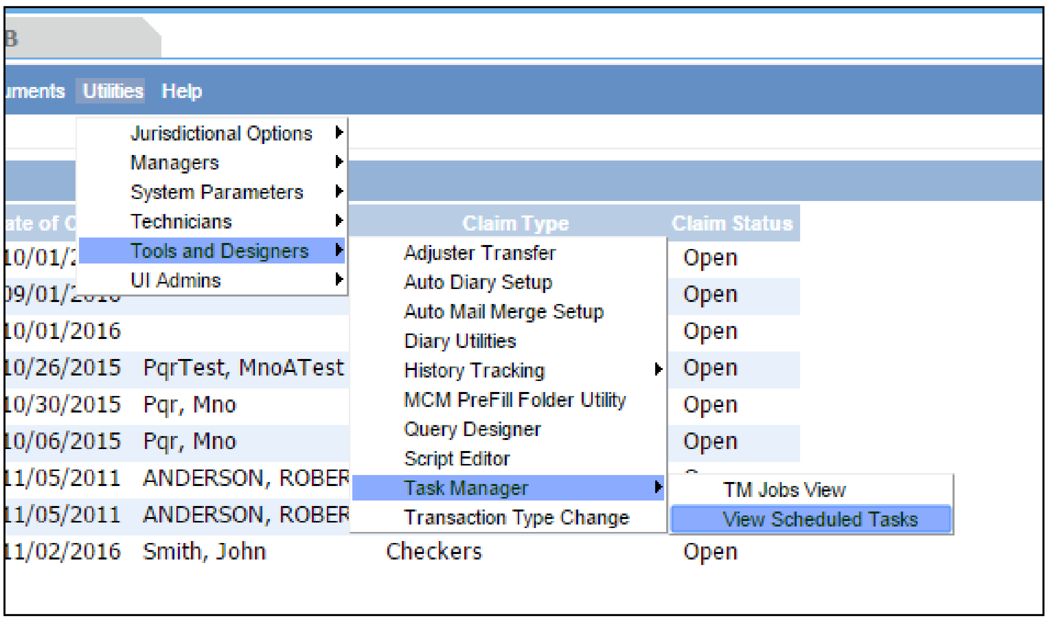
314457_PUS_VALIDATION.txt - Notepad

```
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 afte
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
```

Scheduling Positive Pay Tasks

To Schedule a Positive Pay 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.

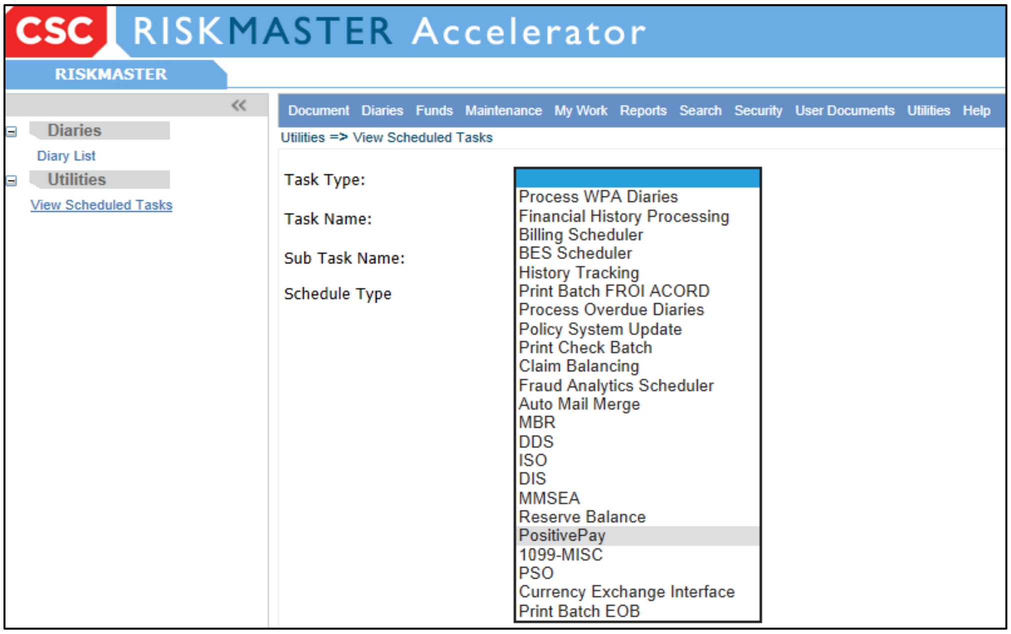


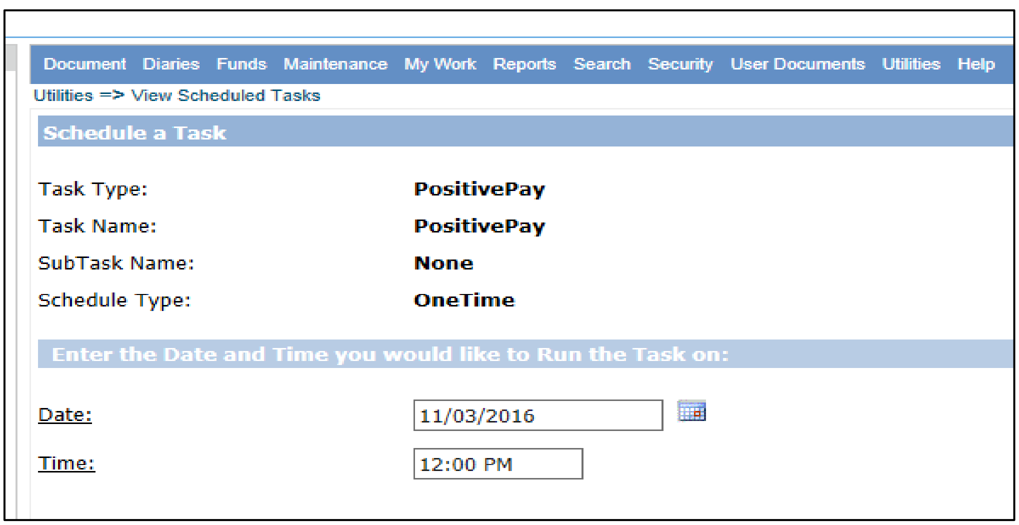
6. From the Task Type drop down list, select the type of task as Positive Pay.
7. In the Task Name field, enter the name of the task.
8. From the Schedule Type drop down list, select the type of schedule as OneTime.
9. Complete the fields on the Schedule a Task: One Time as shown below:

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.

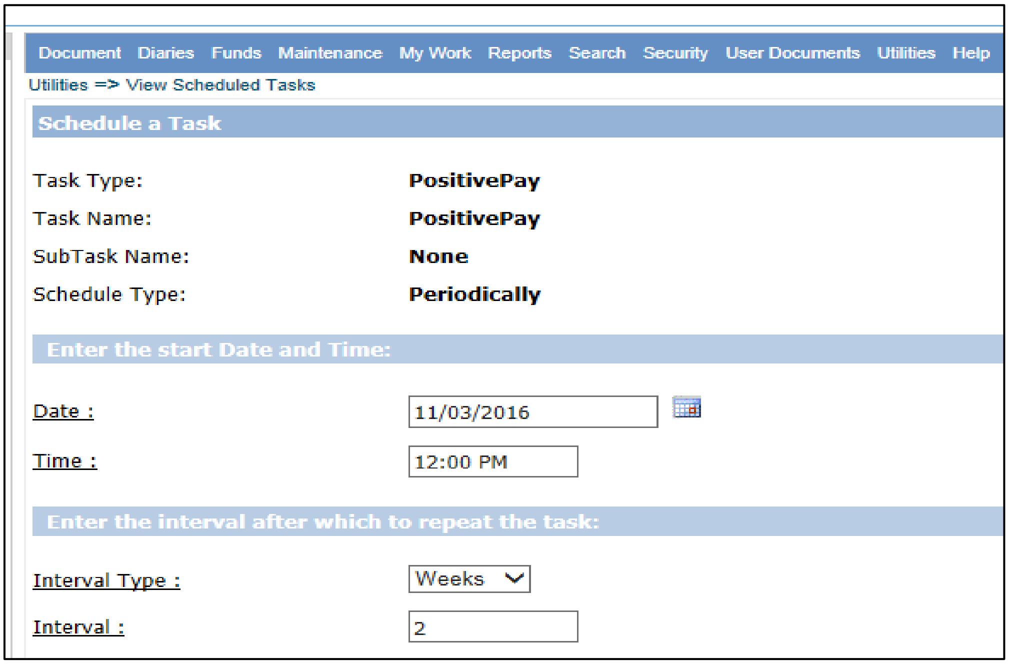
10. Select the Optionset button.
    The Positive Pay Optionset window opens.
11. Complete the fields on the Positive Pay Optionset window and select the Save button.
    The task is scheduled to run once.





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.



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.

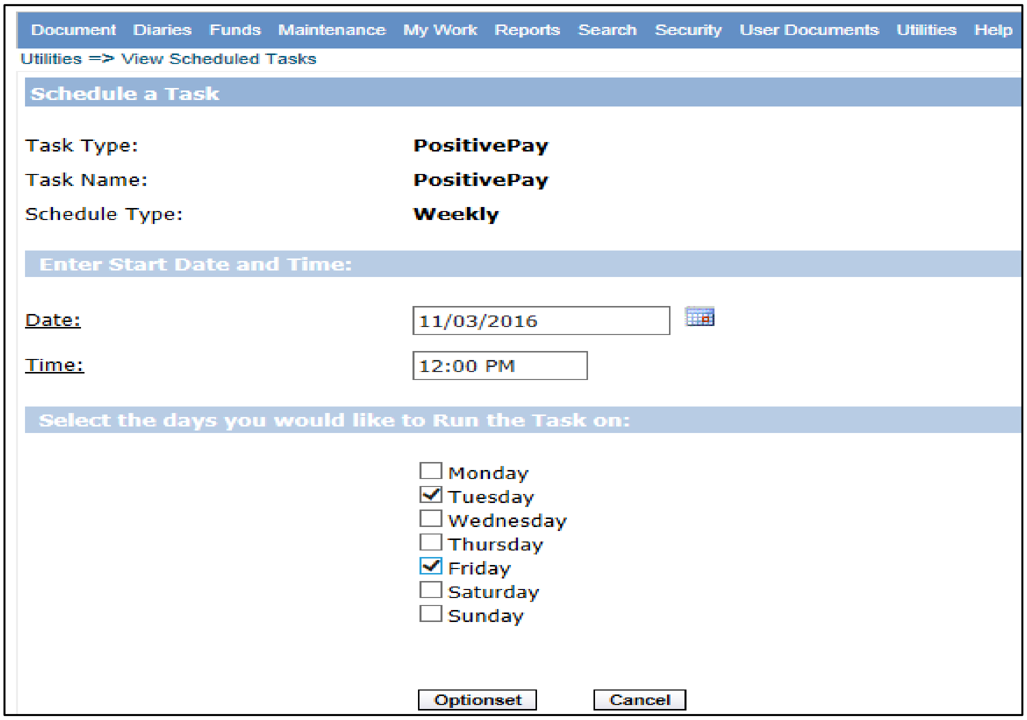
   Enter the interval after which to repeat the task:

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.



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:

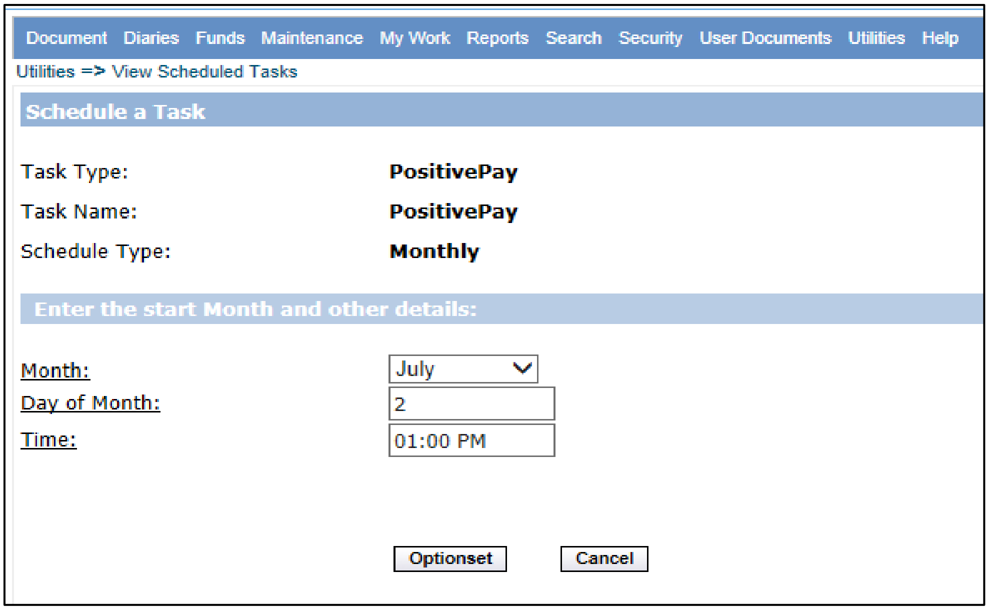
   Enter Start Date and Time:

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. **Note:** 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:

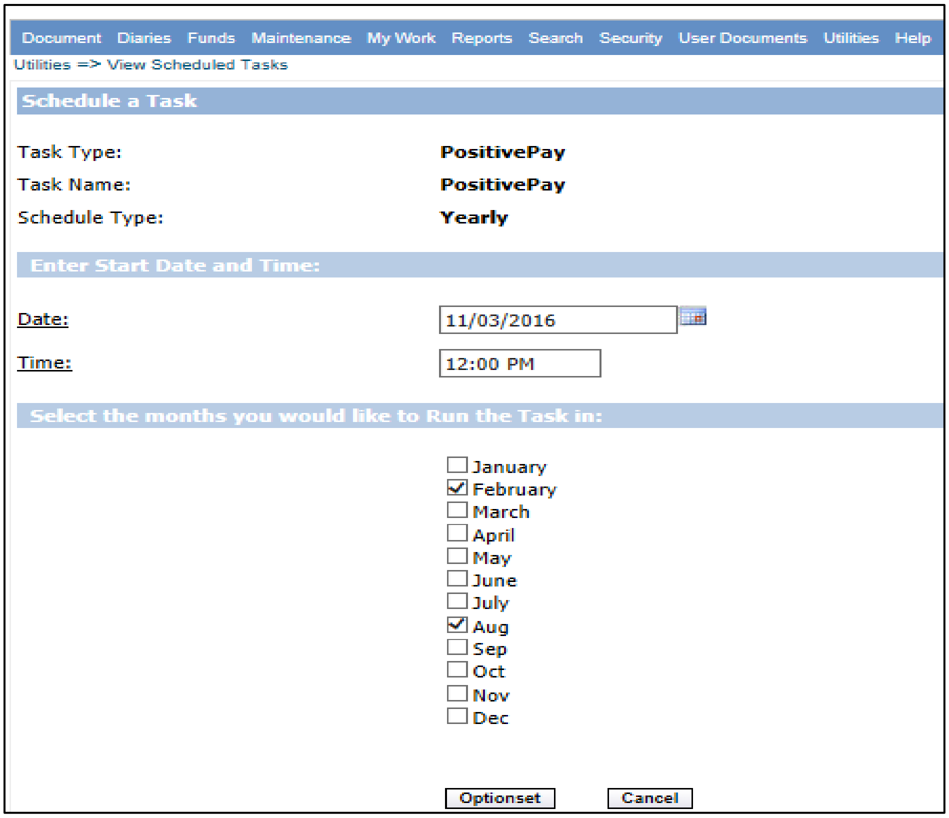
Enter the start Month and other details

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.



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:

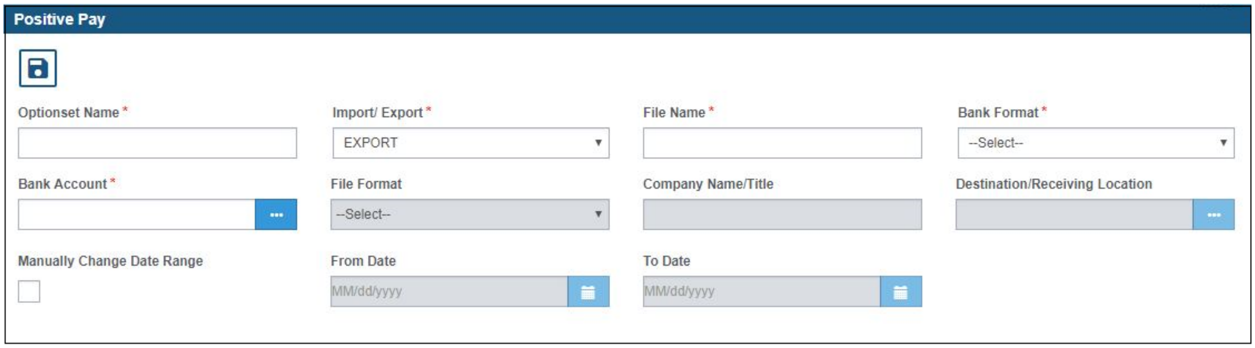
Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Select the months you would like to Run the Task in:	Select the check box for the month in which you want to schedule the task to run. **Note:** You can select more than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

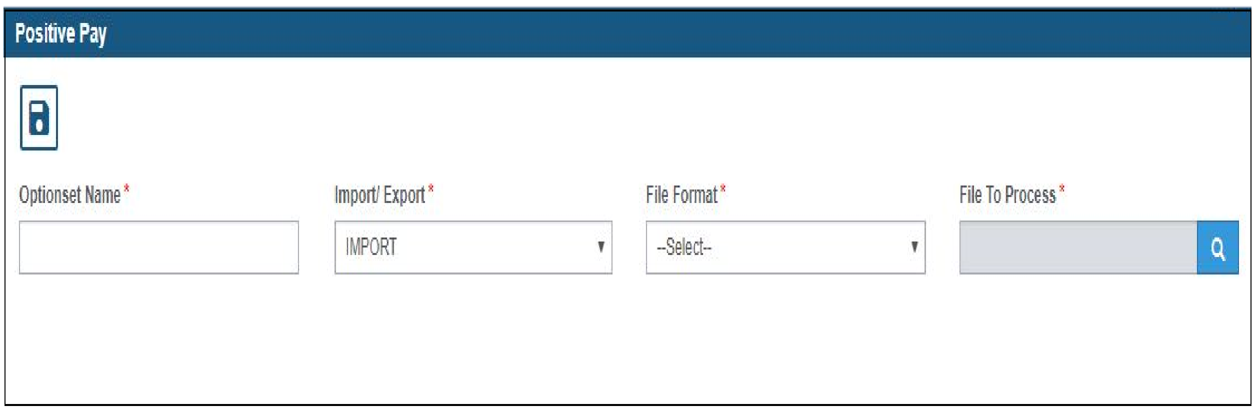
Positive Pay Optionset window

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

Import/Export →Export



Import/Export →Import



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

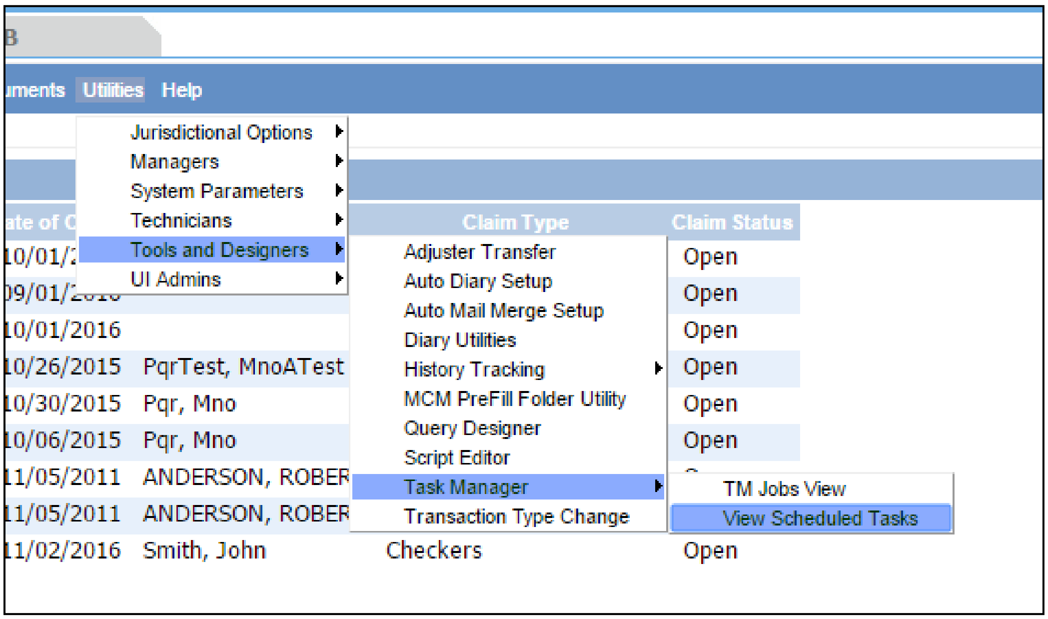
Optionset Name	Enter the name of the option set. The Option Name is required.

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

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.

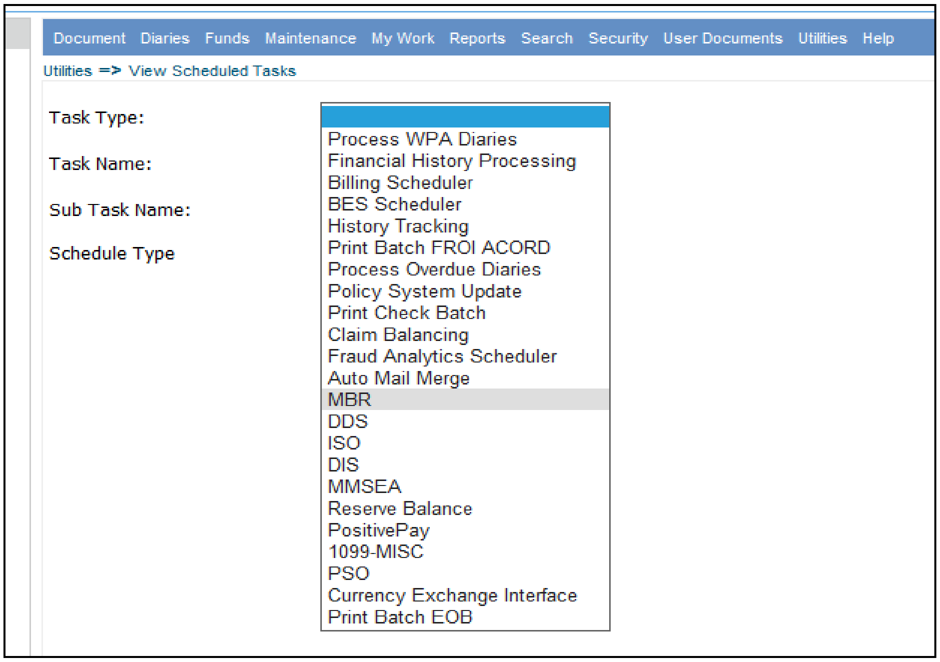


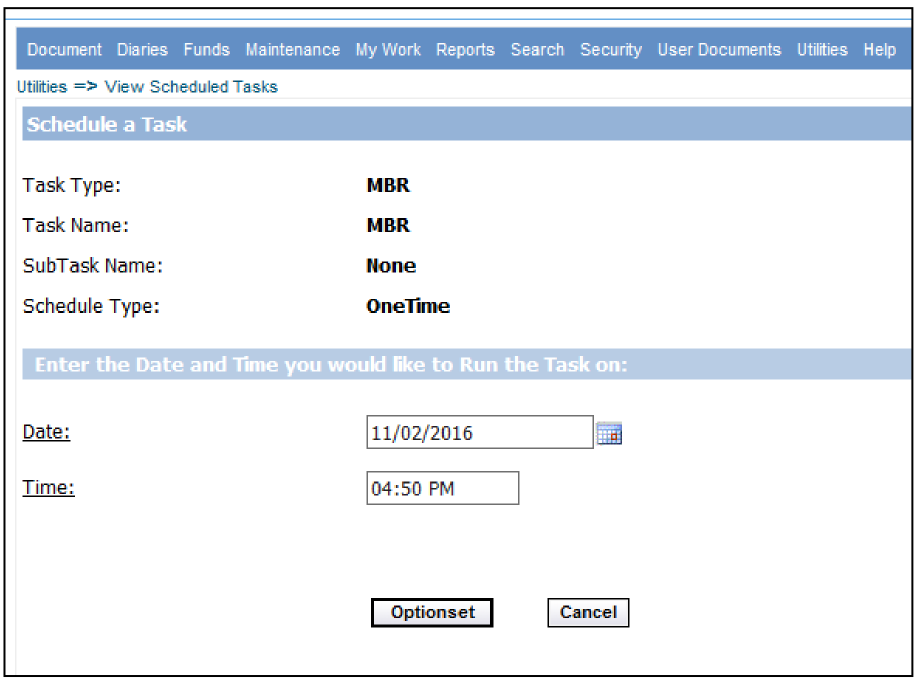
6. From the Task Type drop down list, select the type of task as MBR.
7. In the Task Name field, enter the task name.
8. From the Schedule Type drop down list, select the type of schedule as OneTime.
9. Complete the fields on the Schedule a Task: One Time window as shown below:

   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.

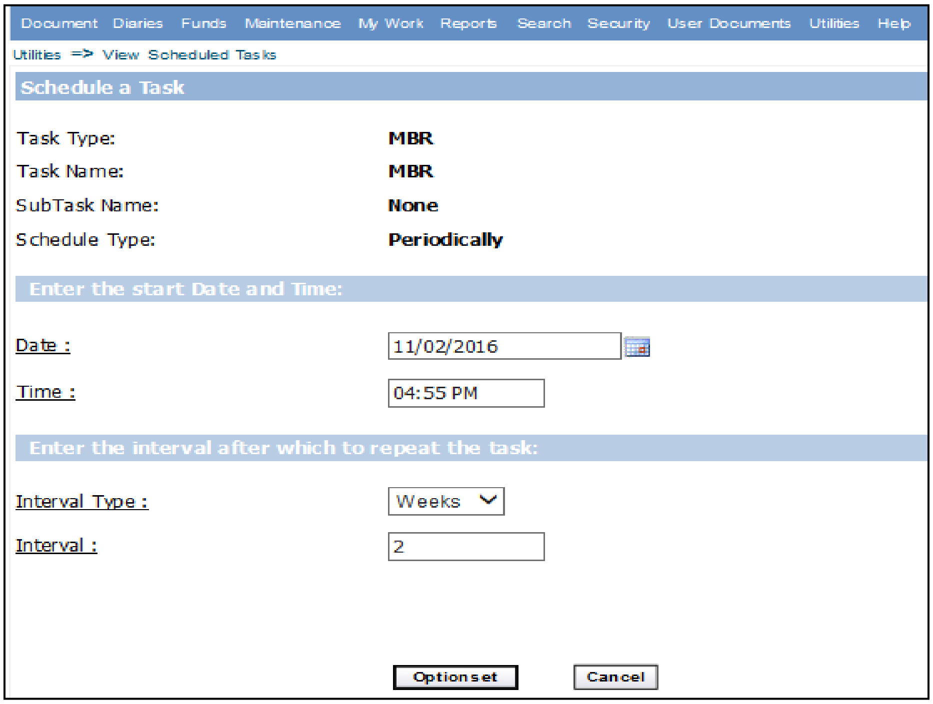
10. Select the Optionset button.
    The MBR Settings window opens.
11. Complete the fields on the MBR Settings window and select the Apply button.
    The task is scheduled to run once.


Document Diaries Funds Maintenance My Work Reports Search Security User Documents Utilities Help
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
Currency Exchange Interface
Print Batch EOB


Document Diaries Funds Maintenance My Work Reports Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks
Schedule a Task
Task Type: MBR
Task Name: MBR
SubTask Name: None
Schedule Type: OneTime
Enter the Date and Time you would like to Run the Task on:
Date: 11/02/2016
Time: 04:50 PM
Optionset
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.



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.

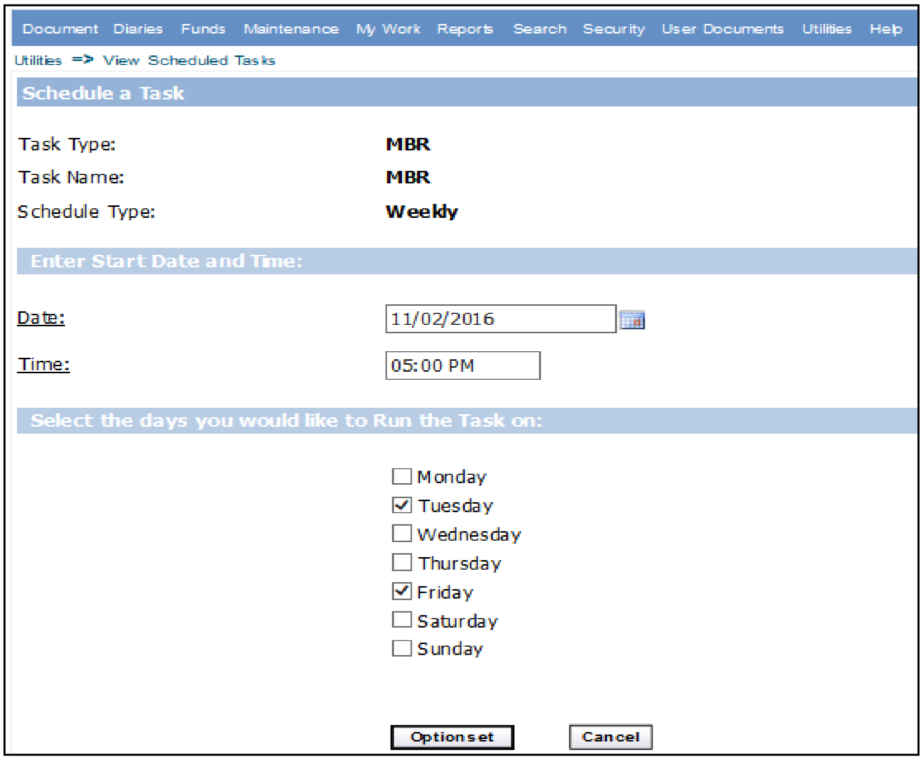
Enter the interval after which to repeat the task:

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.

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.



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:

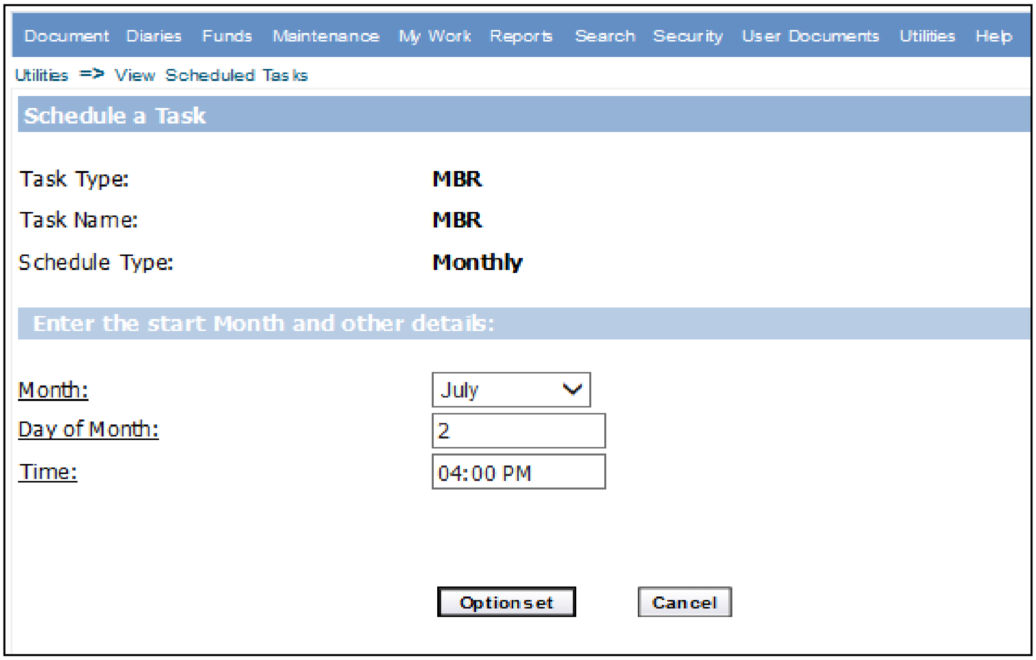
Enter Start Date and Time:

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. **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.

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.



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:

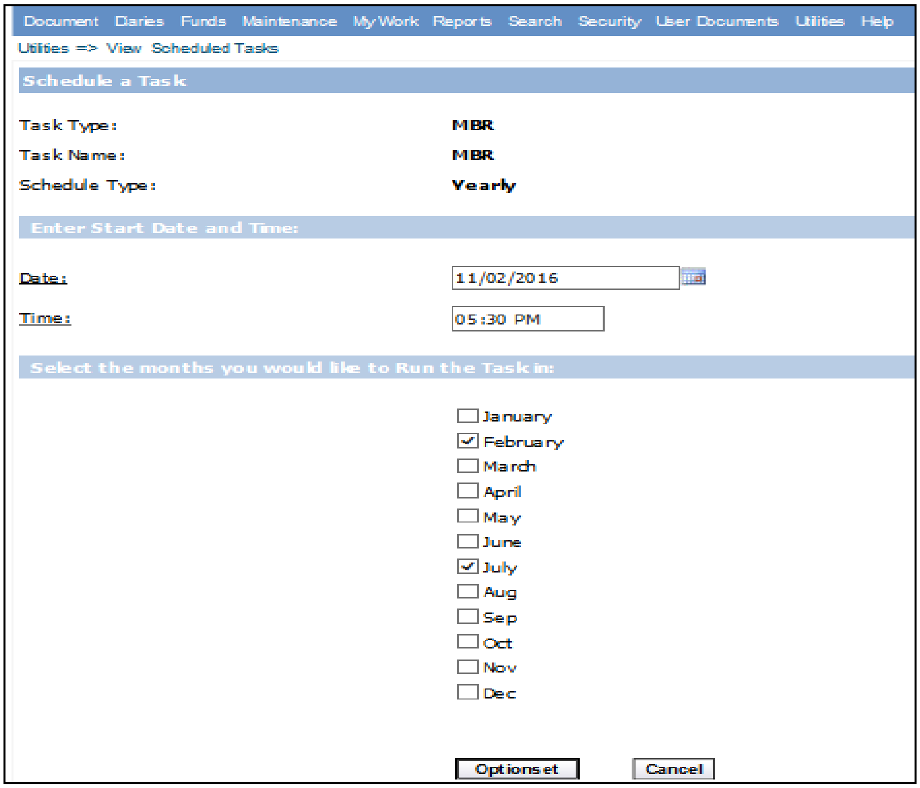
Enter the start Month and other details:

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.

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.



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:

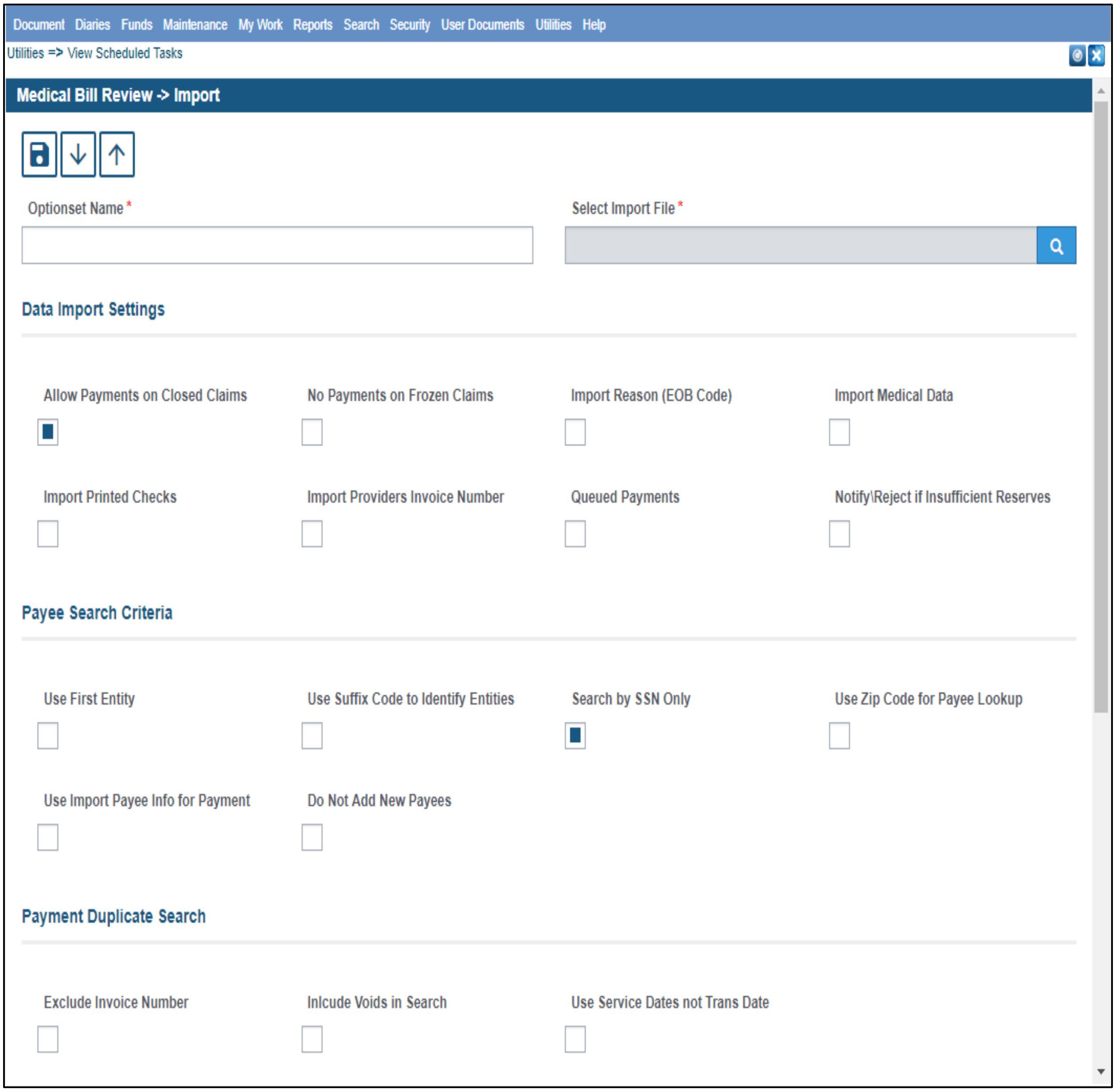
Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Select the months you would like to Run the Task in:	Select the check box for the month in which you want to schedule the task to run. **Note:** You can select more than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

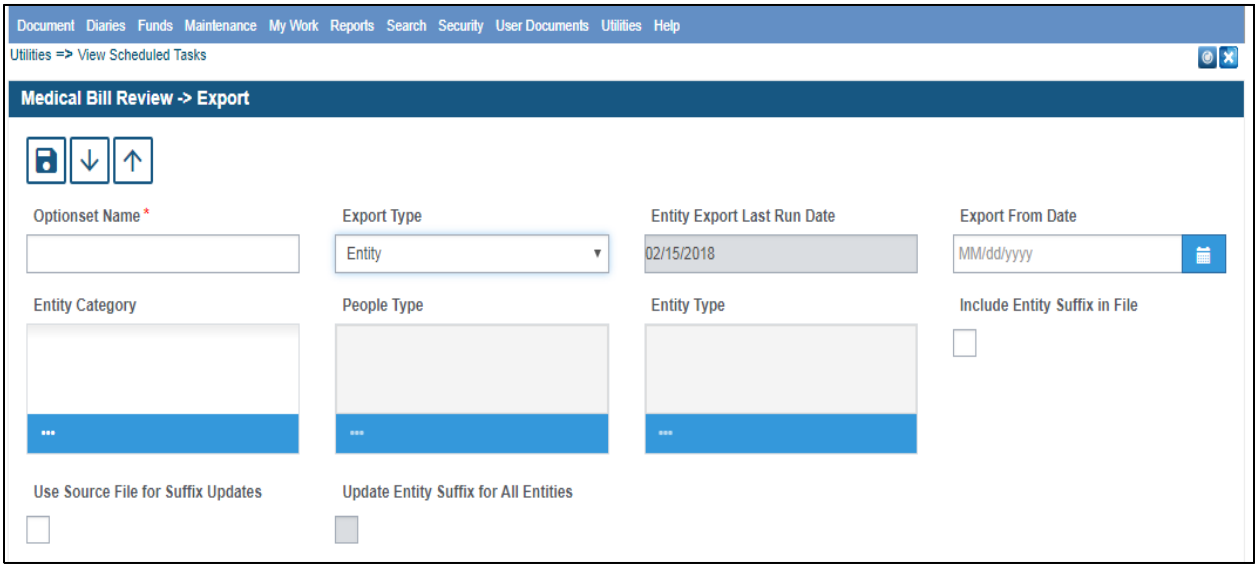
The task is scheduled to run yearly.

MBR Settings Window

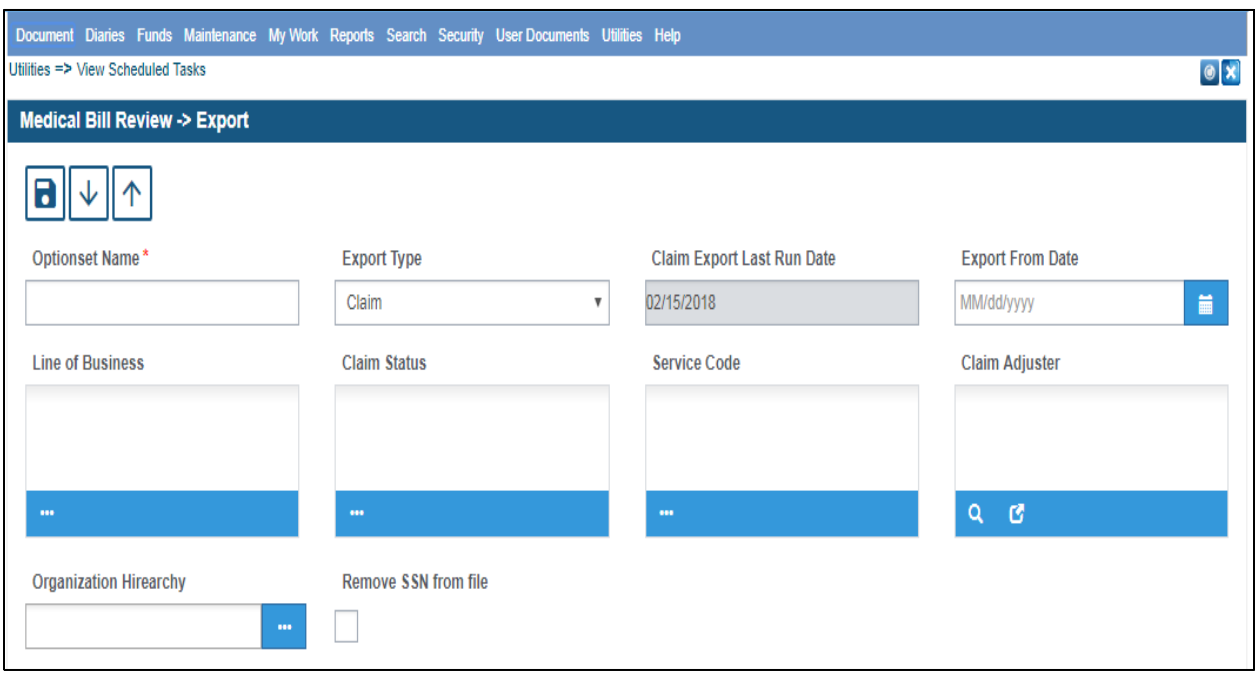
To open from the View ScheduledTask window, select the Option set button.



Screenshot of Export settings for when Export Type is Entity.



Screenshot of Export settings when Export Type is Claim.



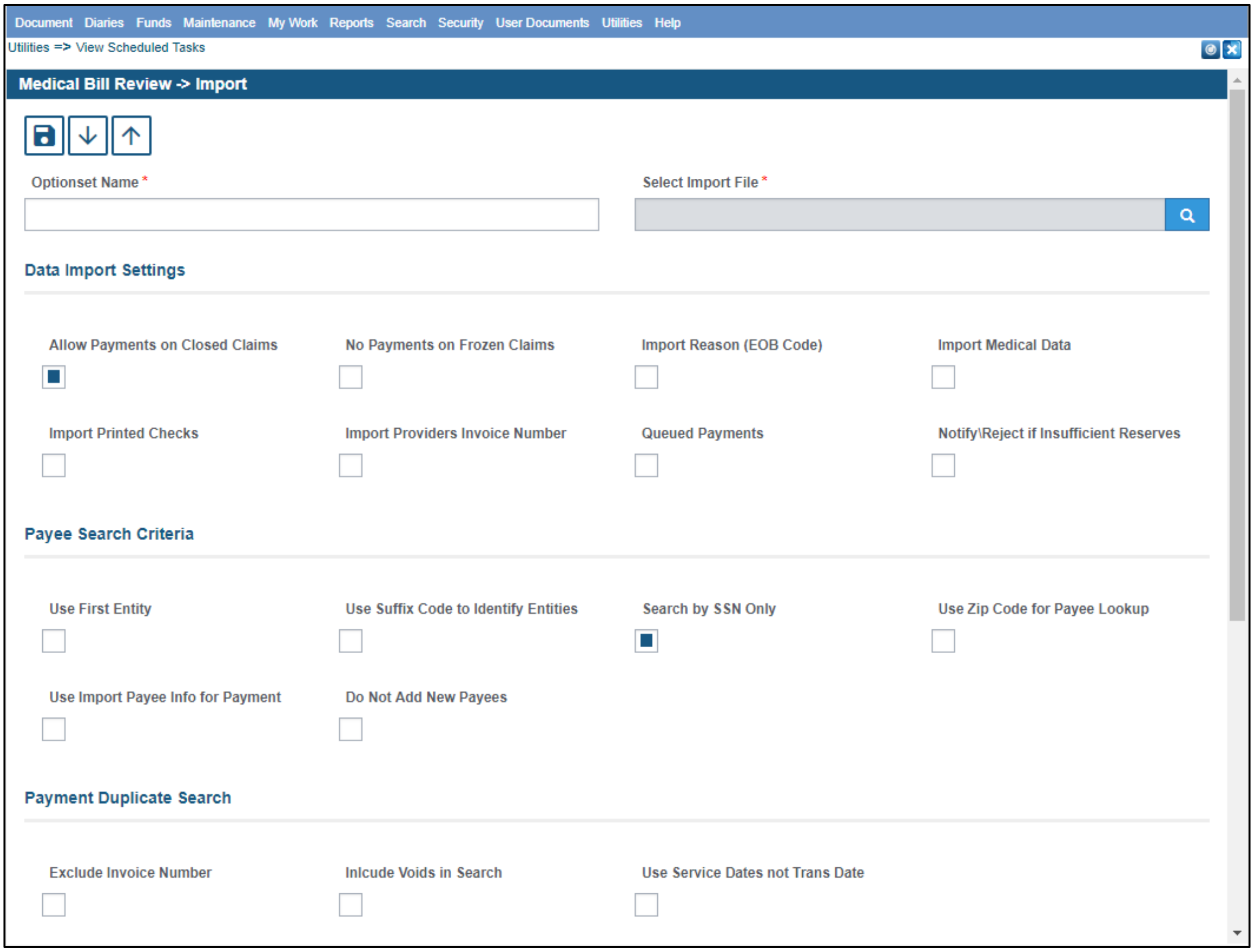
Export Type

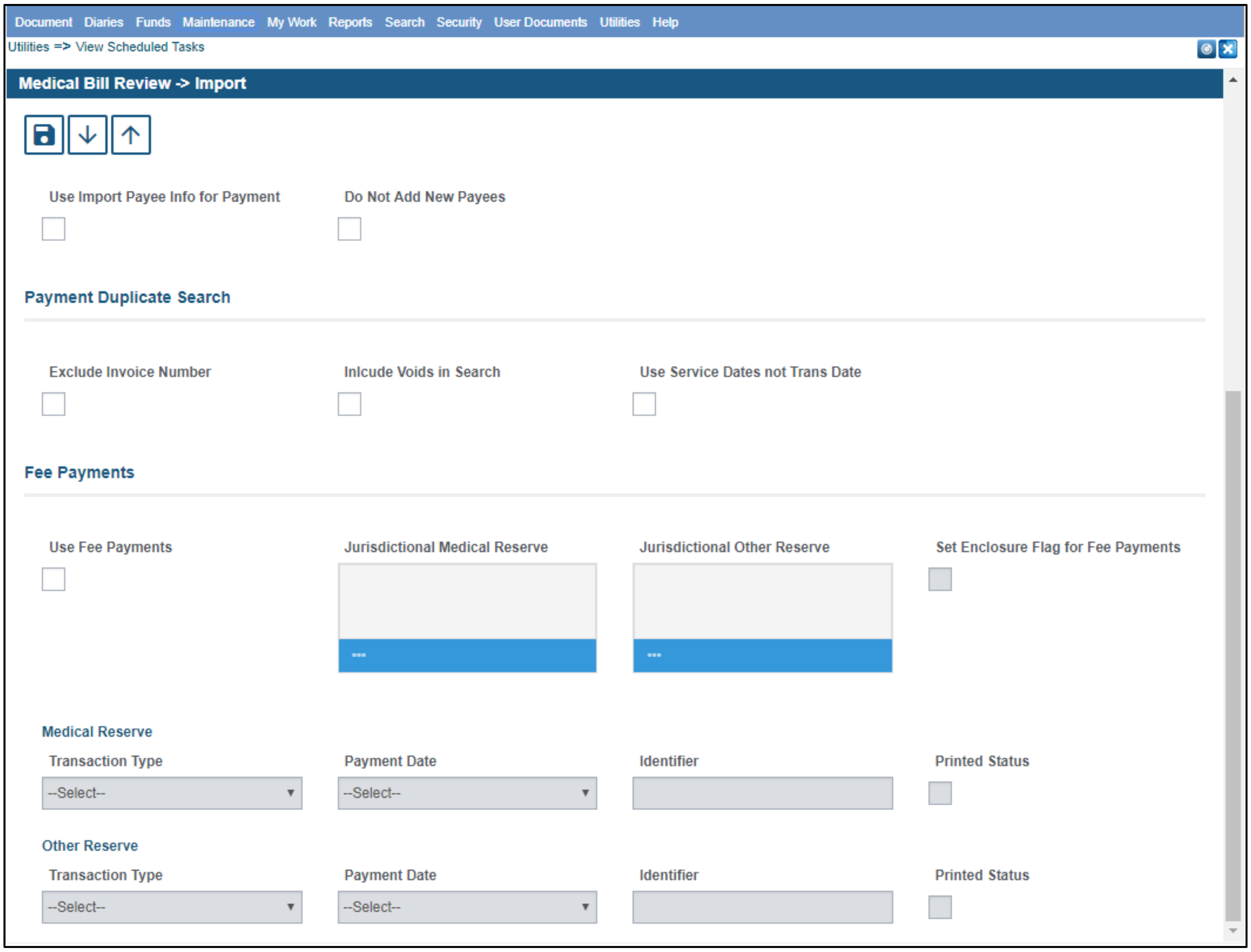
OptionSet Name Enter the name of the option set. The Option Name is required.

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 Option Selected)	If entered, this date will be used to determine the start date for which 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.**
Remove SSN from File	Select the check box if the Social Security Number is not to be included in the Claim Export file.
Line of Business	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.
Organization Hierarchy	Select the Organization Hierarchy from the Search button, a tree view is opened depicting the hierarchy from the Organization to the department level.
Claim Status	Select the claim status such as Open, Closed etc.
Service Code	From the list box select the Service codes, claims having the service code selected in this list box will be extracted.
Claim Adjuster	Select the Entity from the Search button, an entity search is opened that displays all the entities that can be selected as adjusters. If claim adjuster is selected then the claims will be filtered on the basis of entities selected as Claim Adjusters. If not selected, all the claims will be processed. Entity Role ON: All the Entities will be displayed.

	Entity Role OFF: Only the Adjuster Entities will be displayed.
Entity Export Options	
Update Entity Suffix Data	
Include Entity Suffix in File	Select the check box to include the Entity Suffix in the Entity Export file.
Use source file for Suffix Updates	Select the check box to use the source file for suffix updates. When selected, the Suffix is updated on the Entity records.
Update Entity Suffix for All Entities	Select the check box to update entity suffix for all entities. **Note:** This file is displayed only when the Use source file for Suffix Updates check box is selected.
Entity Category	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.
Save	Select the button to save the changes.
Cancel	Select the button to cancel the process.


Document Diaries Funds Maintenance My Work Reports Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks
Medical Bill Review -> Import
Optionset Name *
Select Import File *
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



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.

To remove a jurisdiction, select a jurisdiction from the Jurisdiction Medical Reserve list box and select the < arrow next to the list box.

Jurisdiction Other Reserve

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.

To remove a jurisdiction, select a jurisdiction from the Jurisdiction Other Reserve list box and select the < arrow next to the list box.

Medical Reserve

- **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

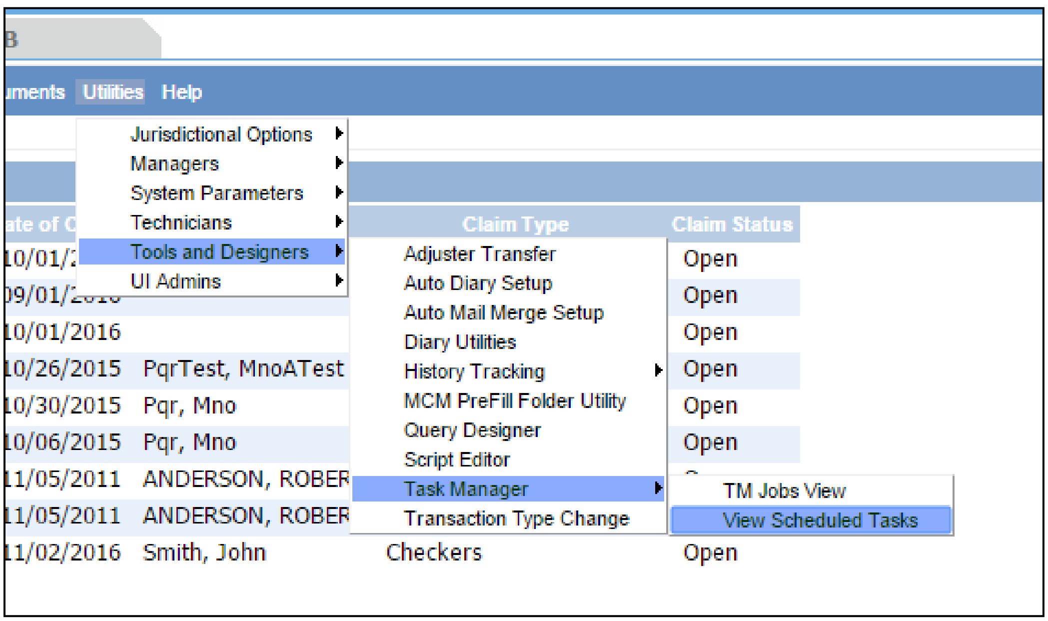
Scheduling MMSEA Tasks

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.

   .



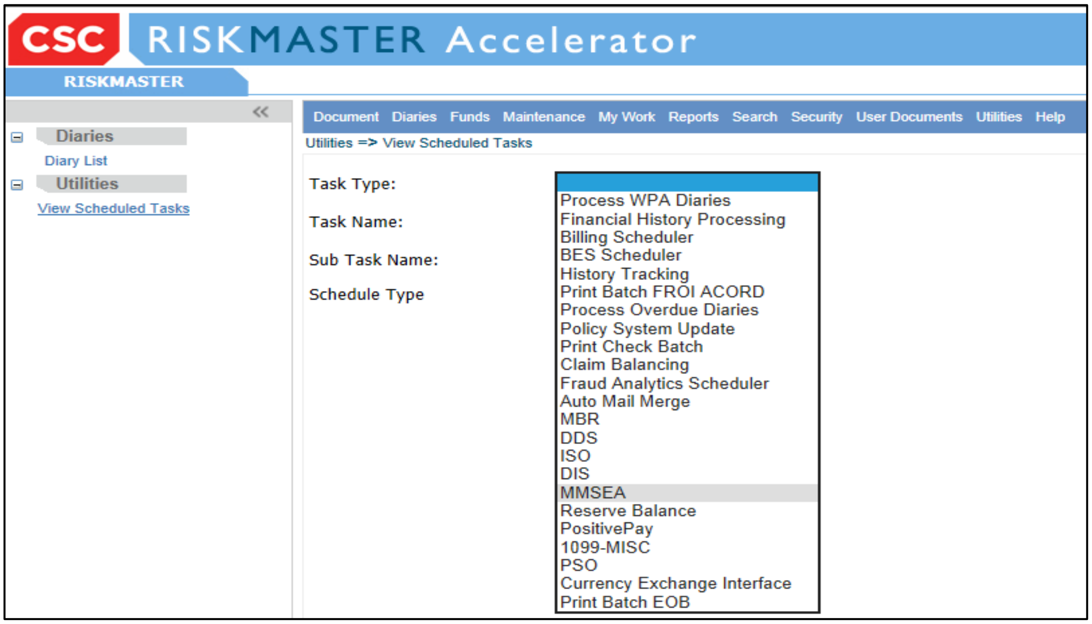
5. From the Task Type drop down list, select the type of task as MMSEA.
6. In the Task Name field, enter the name of the task.
7. From the Schedule Type drop down list, select the type of schedule as OneTime.
8. Complete the fields on the Schedule a Task: One Time as shown below:

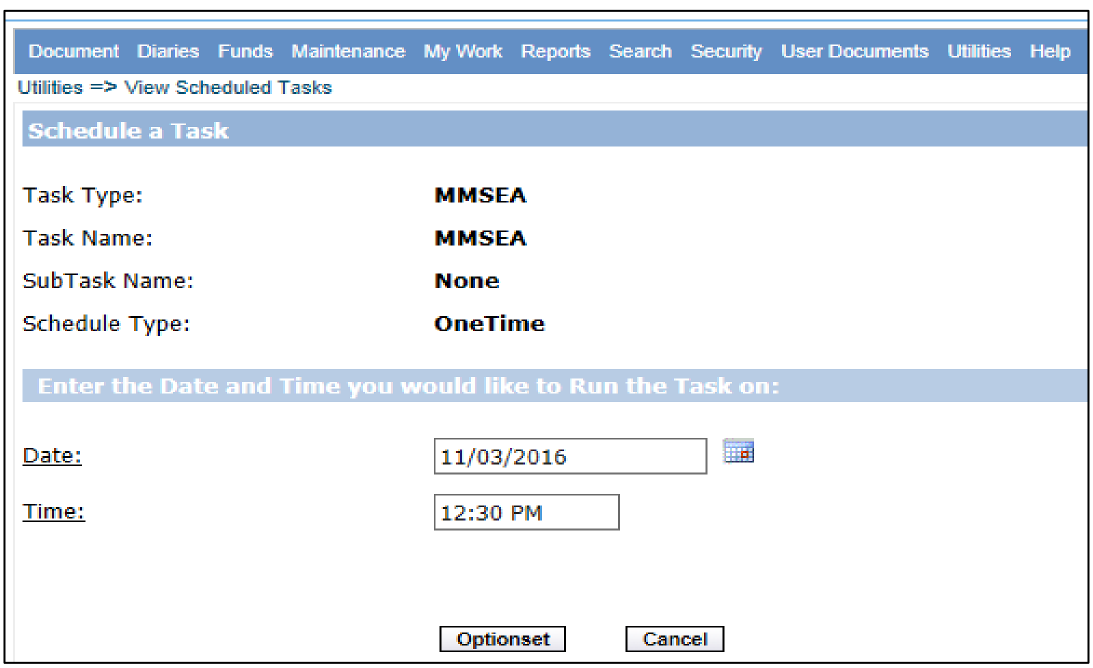
Enter the Date and Time you would like to Run the Task on:

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.

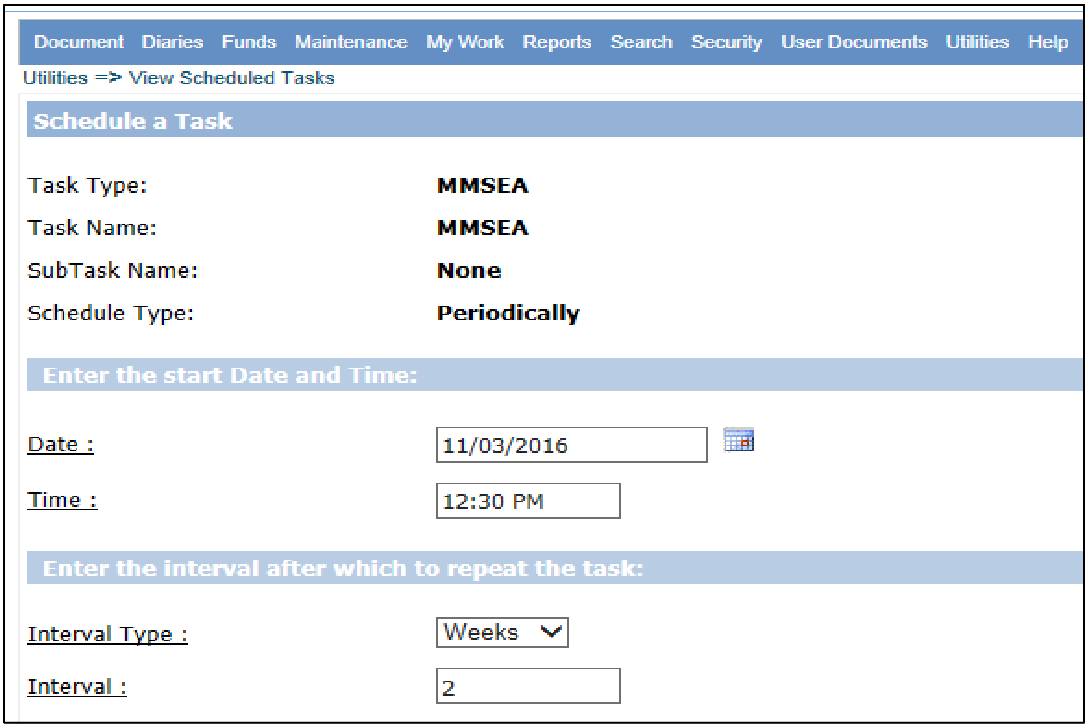
9. Select the Optionset button.
   The MMSEA Optionset window opens.
10. Complete the fields on the MMSEA Optionset window and select the Save button.
   The task is scheduled to run one time.





To Schedule a MMSEA Task: Periodically

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



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:

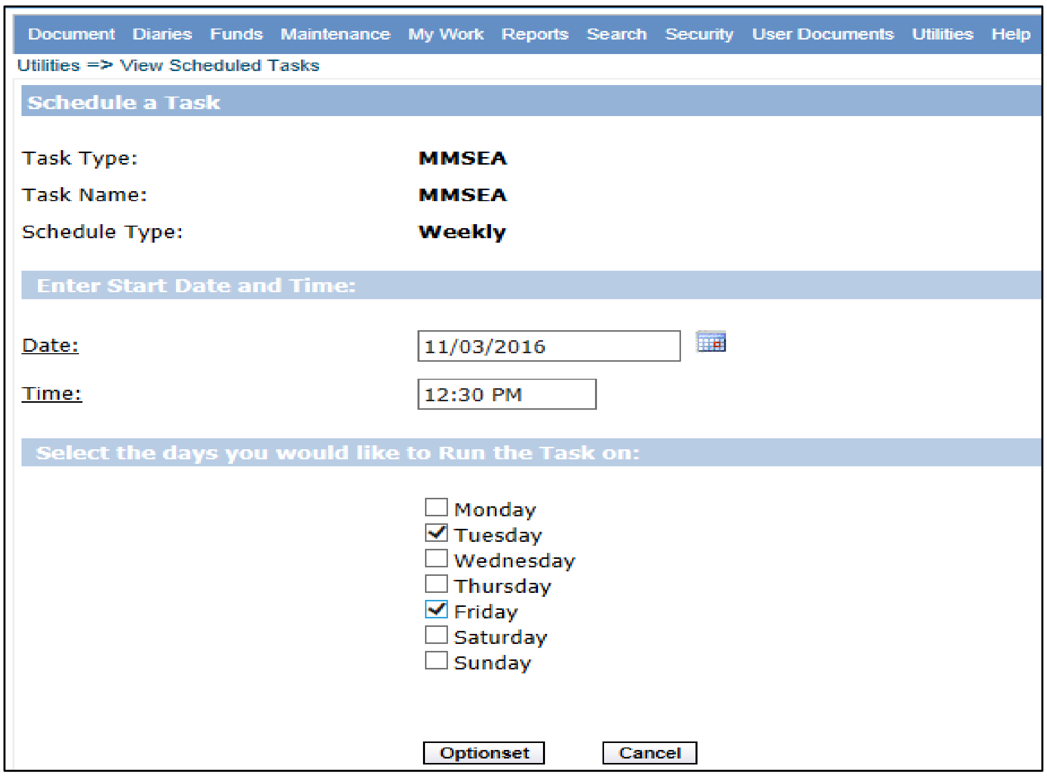
Enter Start Date and Time:	
Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Enter the interval after which to repeat the task:	
Interval Type	From the drop down list, select the type of interval after which you want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

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 periodically based on the defined interval.

To Schedule a MMSEA Task: Weekly

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



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:

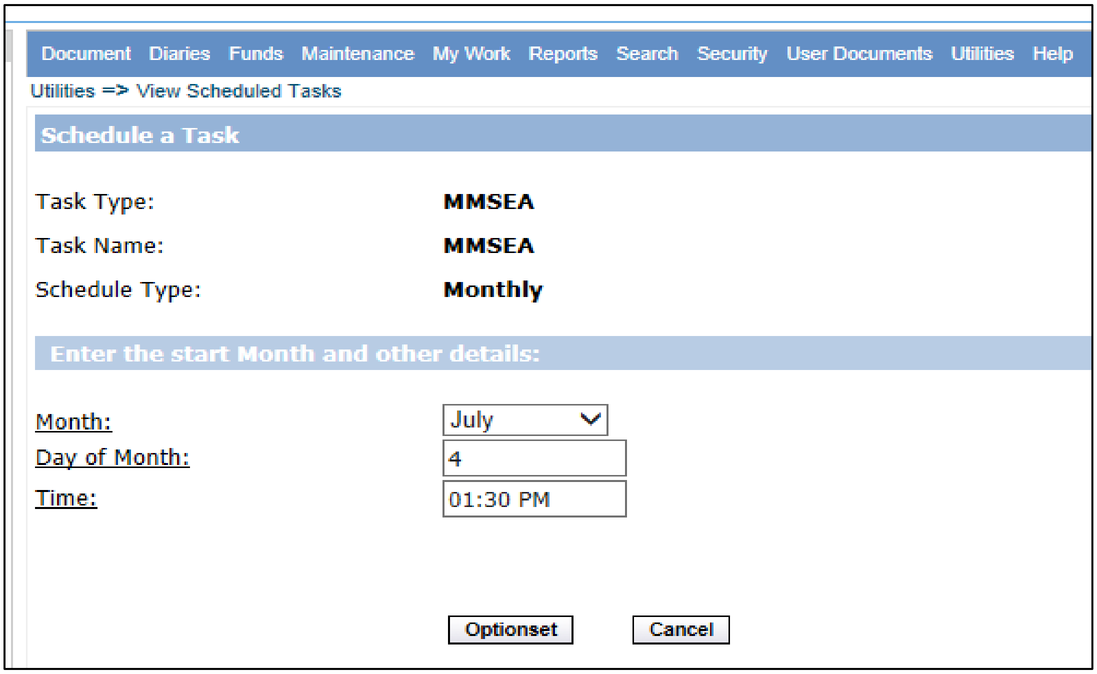
Enter Start Date and Time:

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 Run the Task on	Select the check box for a day of the week on which you want to run the scheduled task. **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.

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 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.



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:

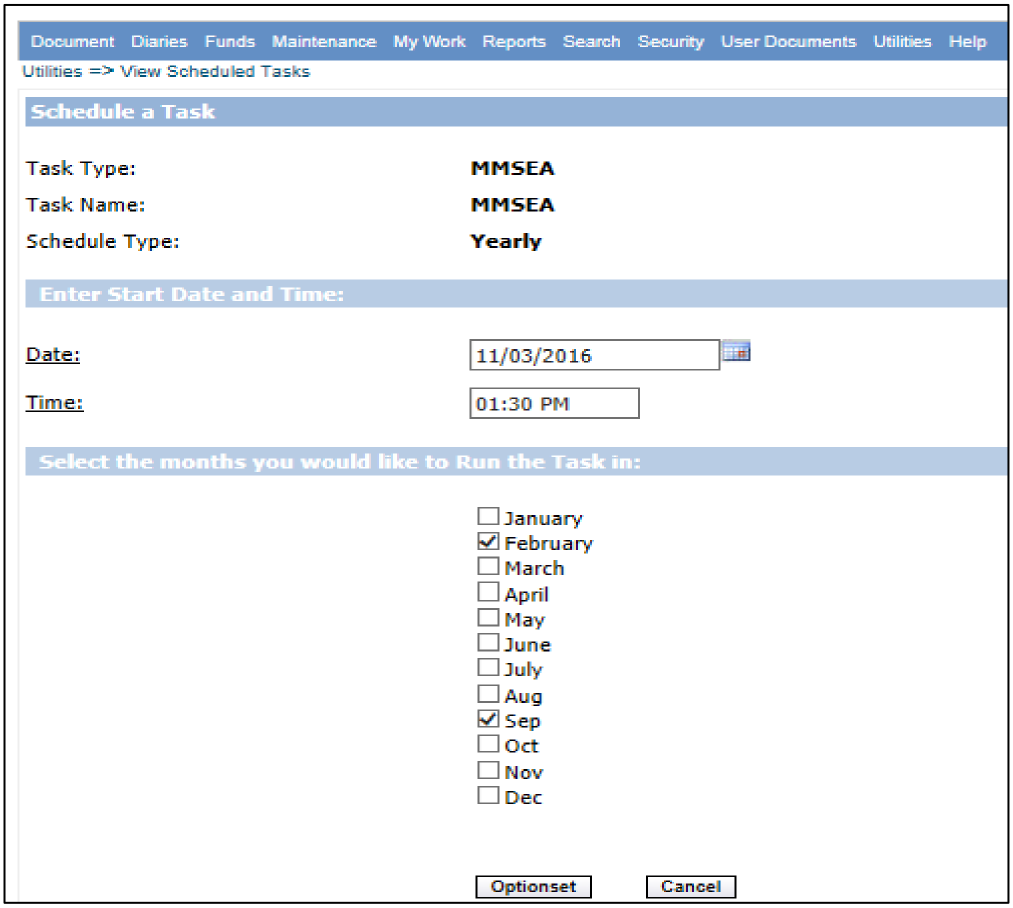
   Enter the start Month and other details:

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.

To Schedule a MMSEA Task: Yearly

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



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. **Note:** 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.

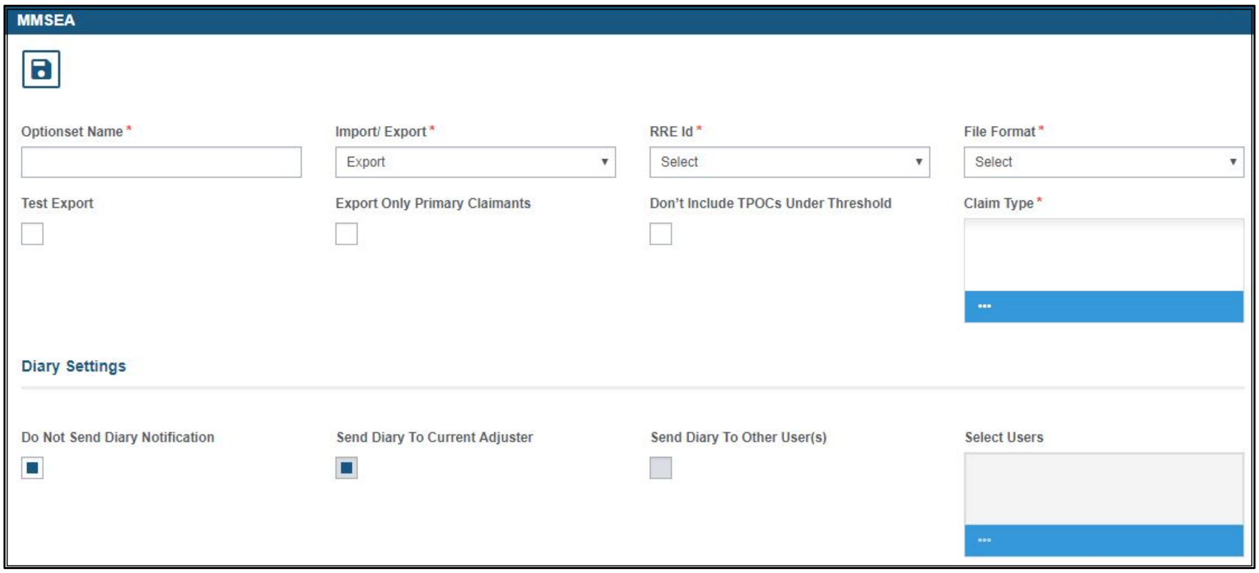
The MMSEA Optionset window opens.

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

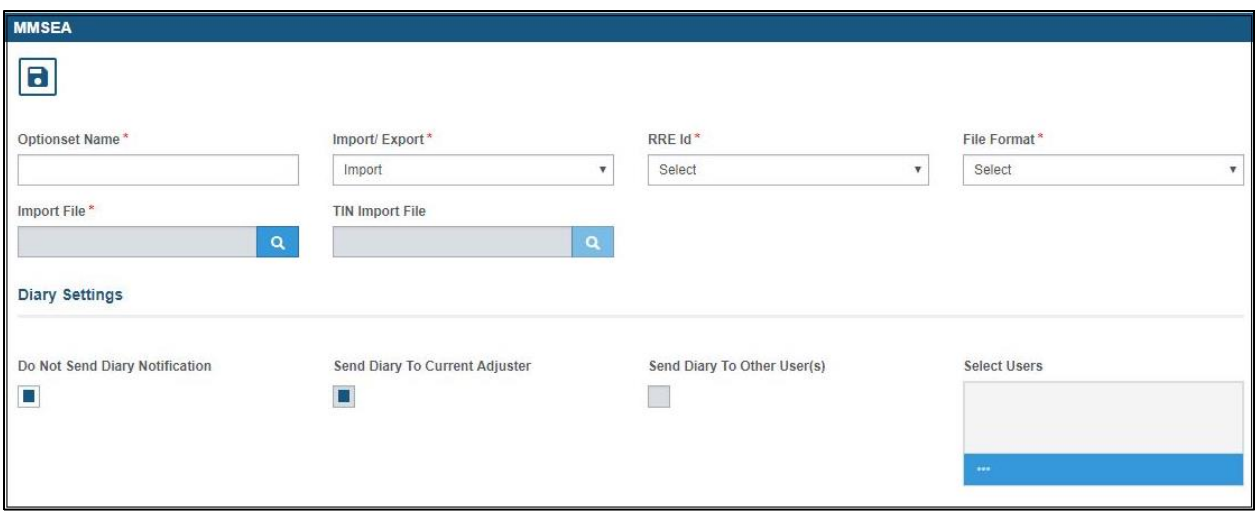
MMSEA Optionset window

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

Import/Export →Export



Import/Export →Import



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.

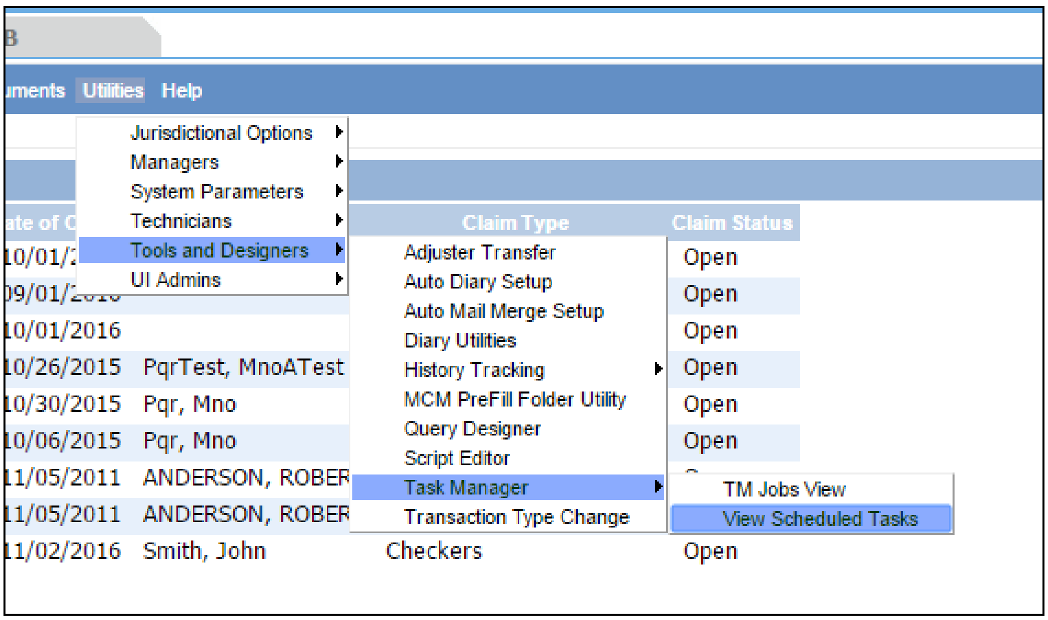
Import

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

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.



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:

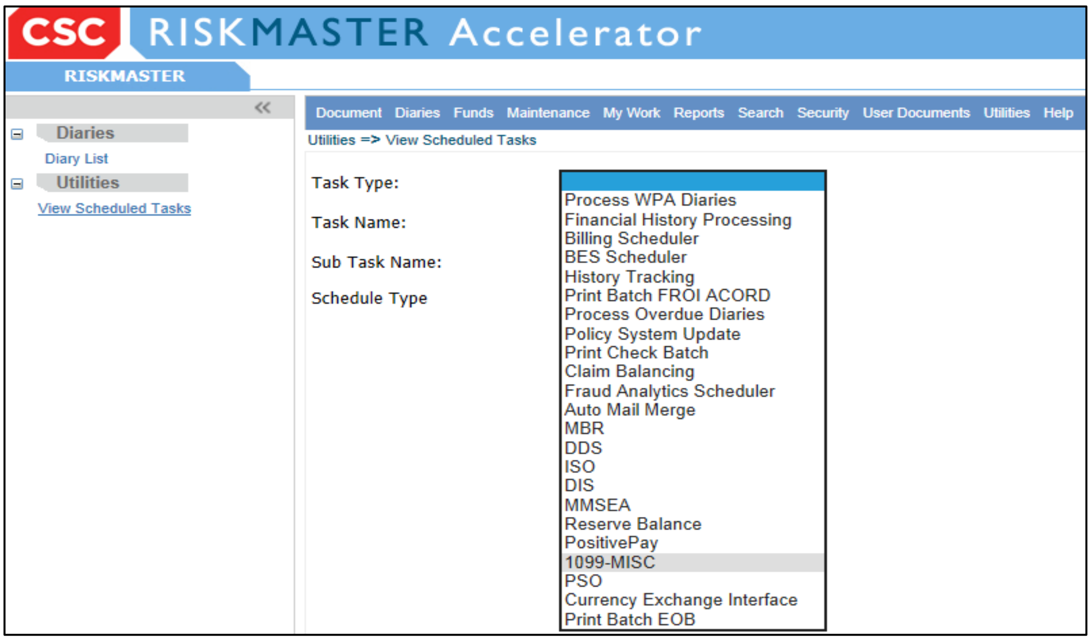
Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Optionset	Select the button to open the 1099 Optionset window.
Cancel	Select the button to close the window without saving the changes.

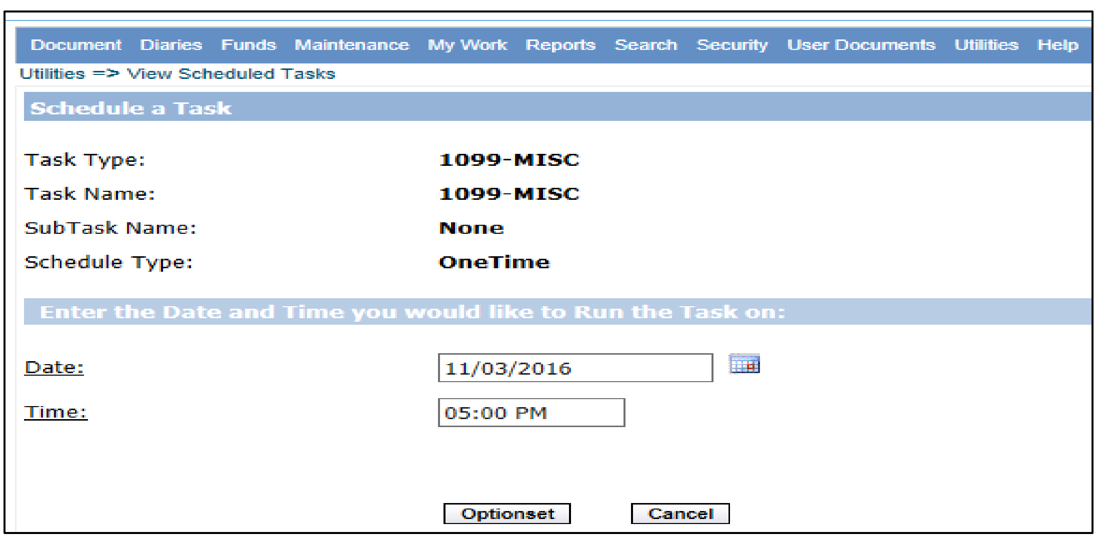
10. Select the Optionset button.

    The 1099 Optionset window opens.

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

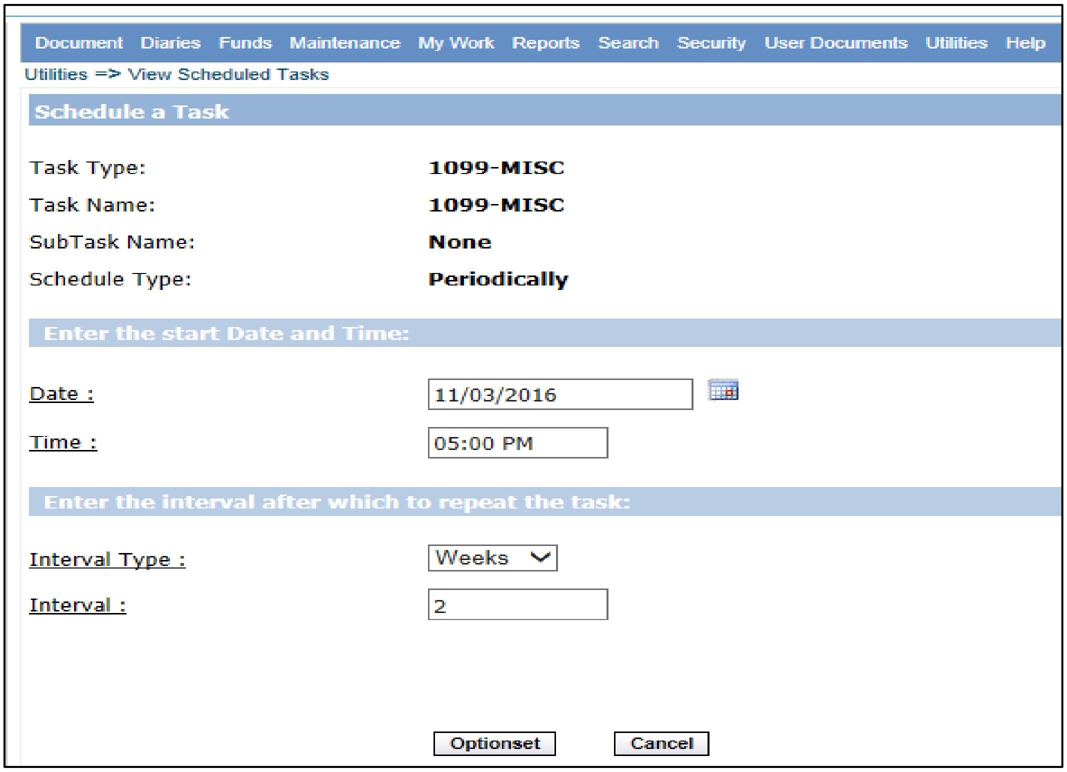
    The task is scheduled to run one time.





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.



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.

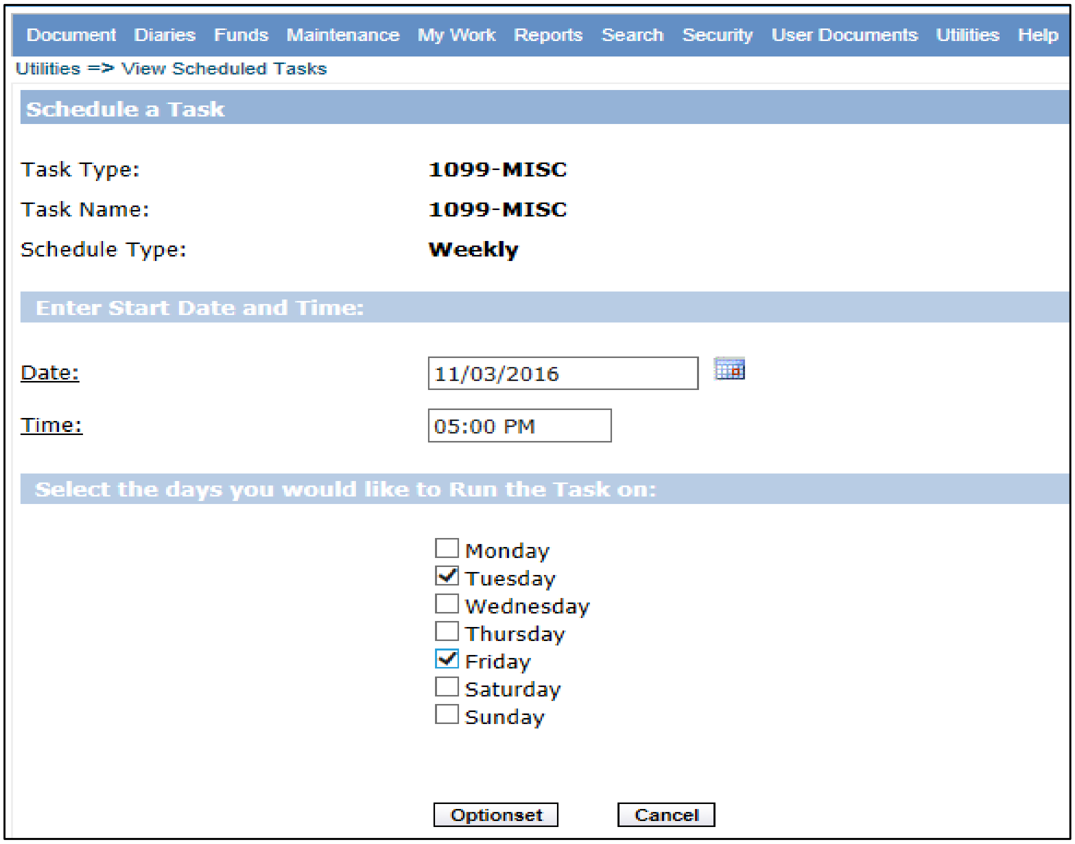
   Enter the interval after which to repeat the task:

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.
7. 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.



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:

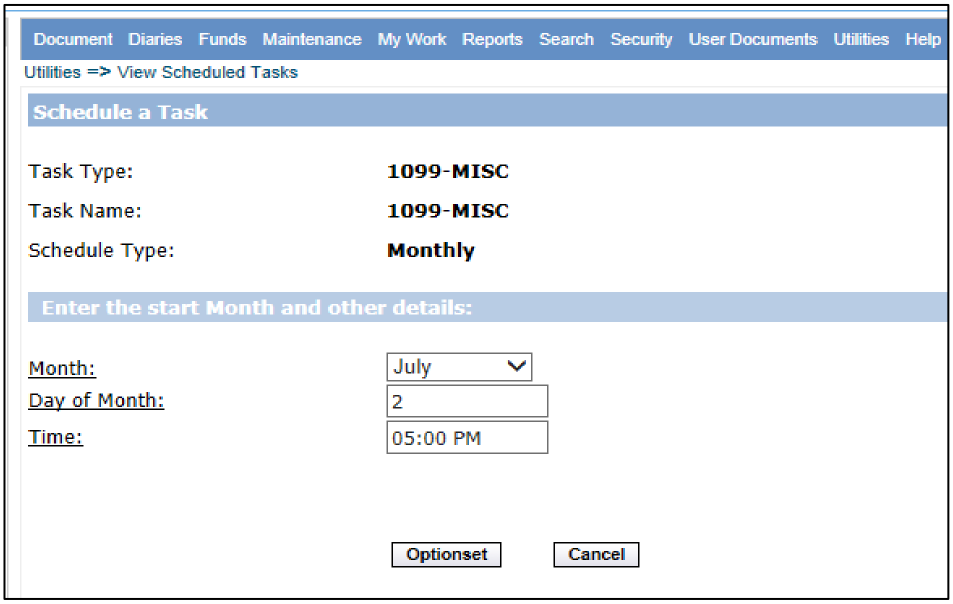
Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Select the days you would like to Run the Task on	Select the check box for a day of the week on which you want to run the scheduled task. **Note:** You can select more 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.

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.



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:

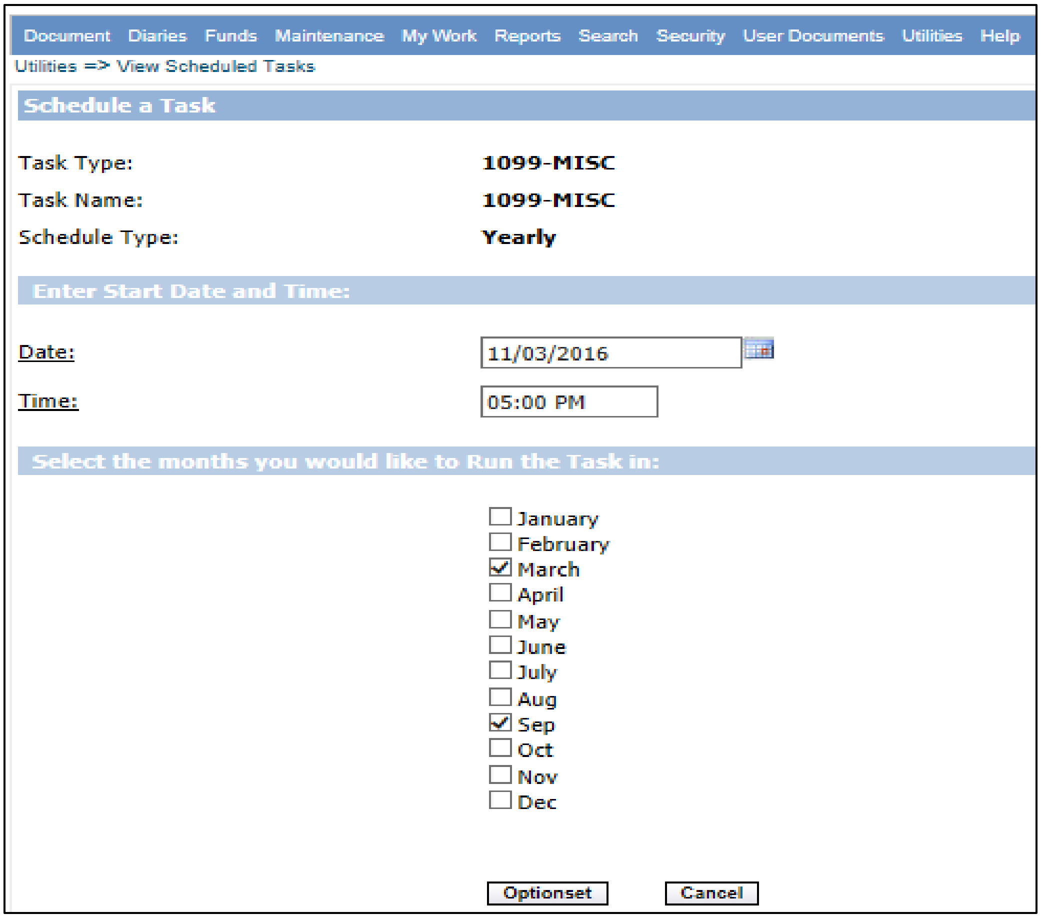
Enter the start Month and other details:

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.

6. 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.



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 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 1099 Optionset window.
Cancel	Select the button to close the window without saving the changes.

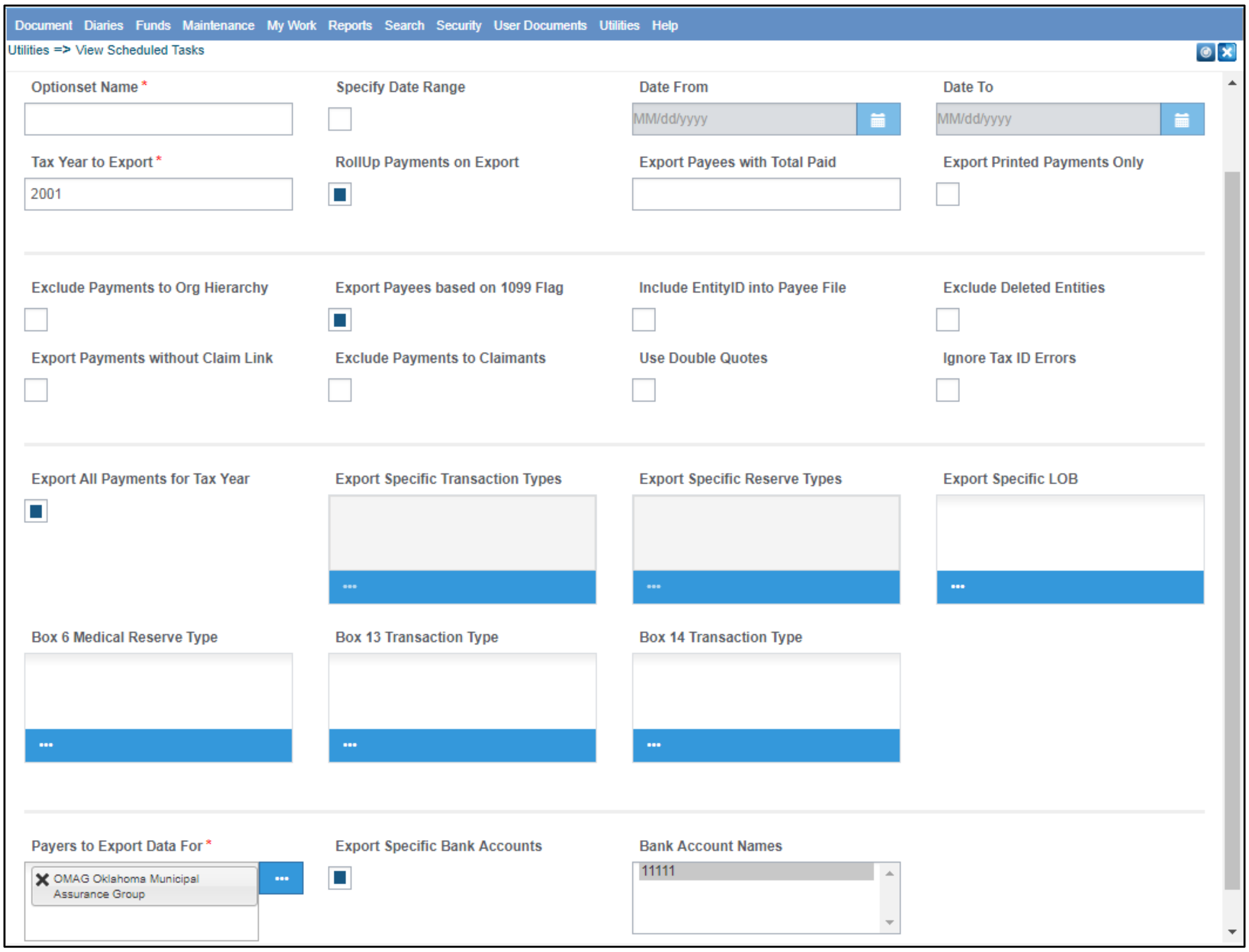
6. Select the Optionset button.

   The 1099 Optionset window opens.
7. 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.



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.

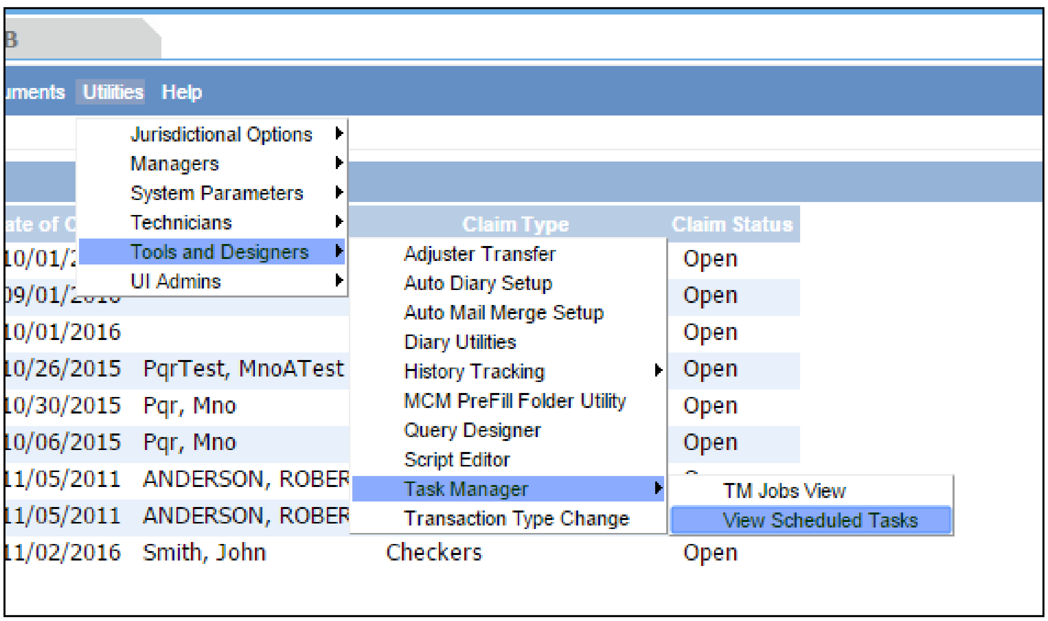
Export Printed Payments Only	Select the check box to export only printed payments for the given tax year. The payments are reported at the organizational level that you select. Otherwise, all payments are exported.
Export Payments without Claim link	Select the check box to export all payments. The payments 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 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.
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 Total Paid =>	This option is active only of you selected the Rollup Payments on Export 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.
Use Double Quotes	Select the check box to include exported data in double quotes instead of single quotes.
Ignore Tax ID errors	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.
Export All Payments For Tax Year	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.
Export Specific Transaction Types	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.
Export Specific Reserve Types	Select the option to export all payments that have only reserve types that you select. Once you select this option, then you must select the transaction types that you want to include.
Export Specific LOB	Select the option to export all payments for specific lines of business. To select the lines of business to export payments for, select the search button and then select the lines of business you want from the Codes List.
Box 6 Medical Reserve Type	Select the search button to open the codes list and select the reserve types to include in Box 6 on the 1099 MISC form.

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.
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.



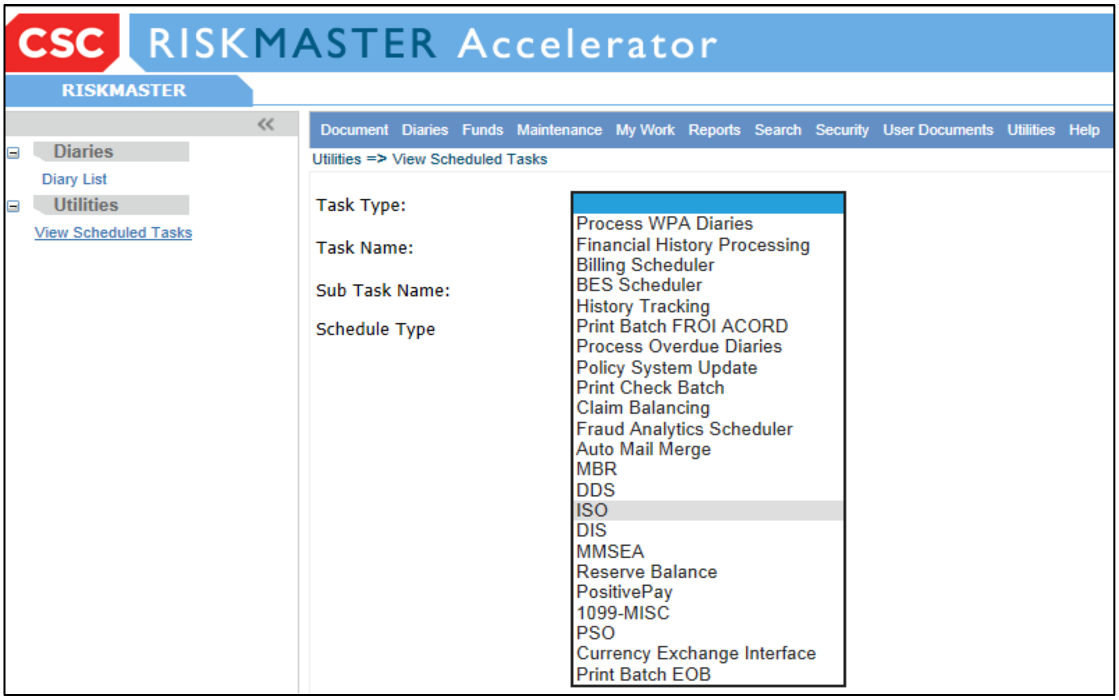
6. From the Task Type drop down list, select the type of task as ISO.
7. In the Task Name field, enter the name of the task.
8. From the Schedule Type drop down list, select the type of schedule as One Time.
9. Complete the fields on the Schedule a Task: One Time window as shown below:

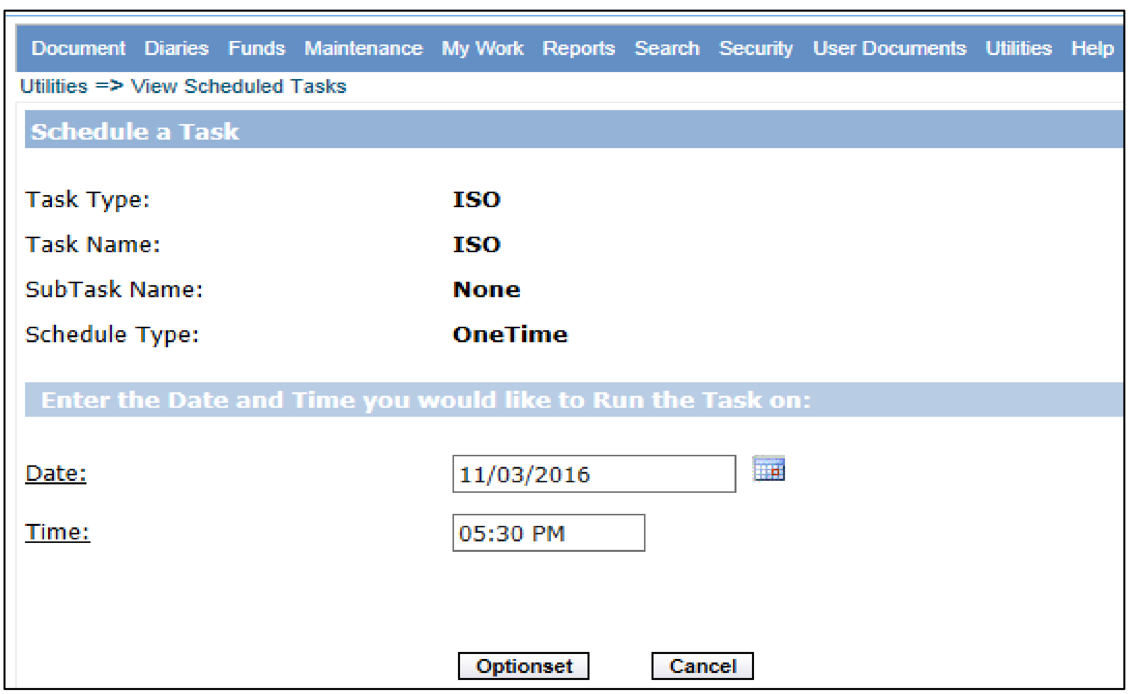
   Enter the Date and Time you would like to Run the Task on:

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.

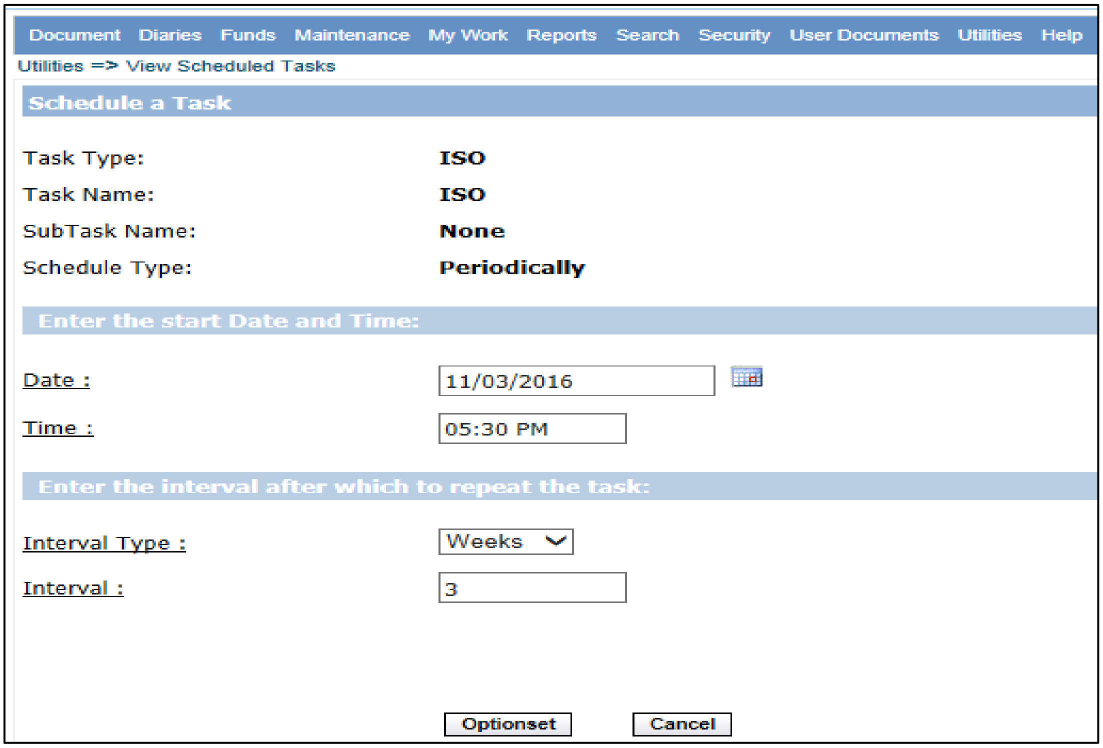
11. Complete the fields on the ISO Optionset window and select the Save Settings button. The task is scheduled to run one time.





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.



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.

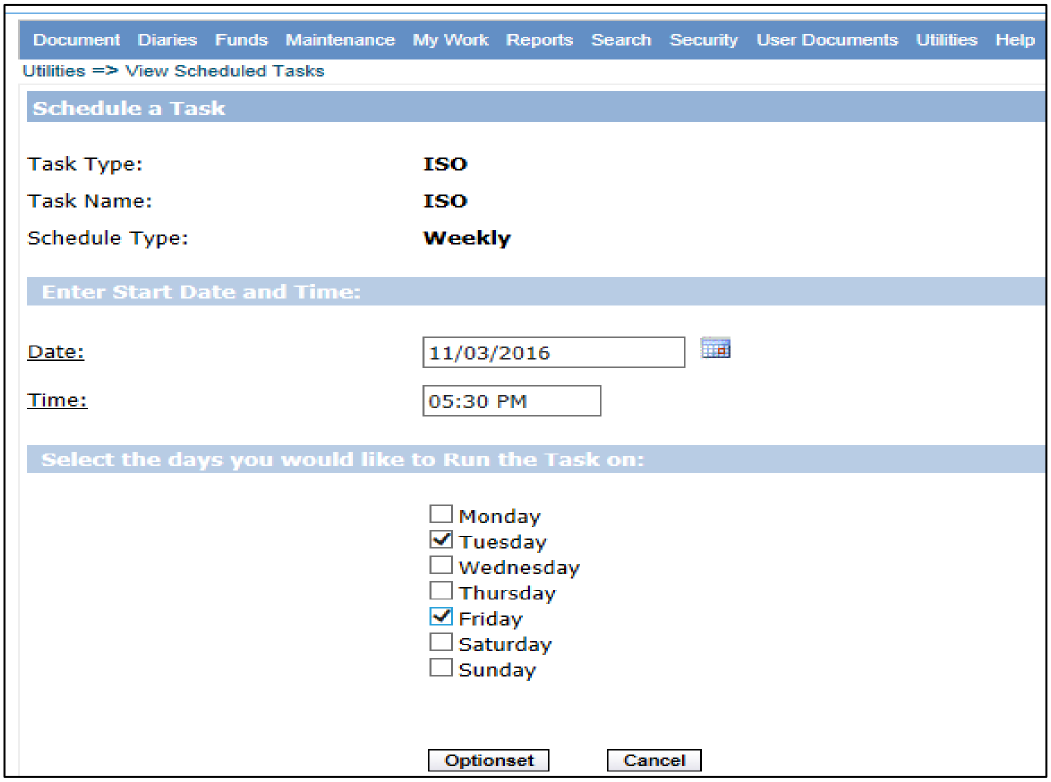
   Enter the interval after which to repeat the task:

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.



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:

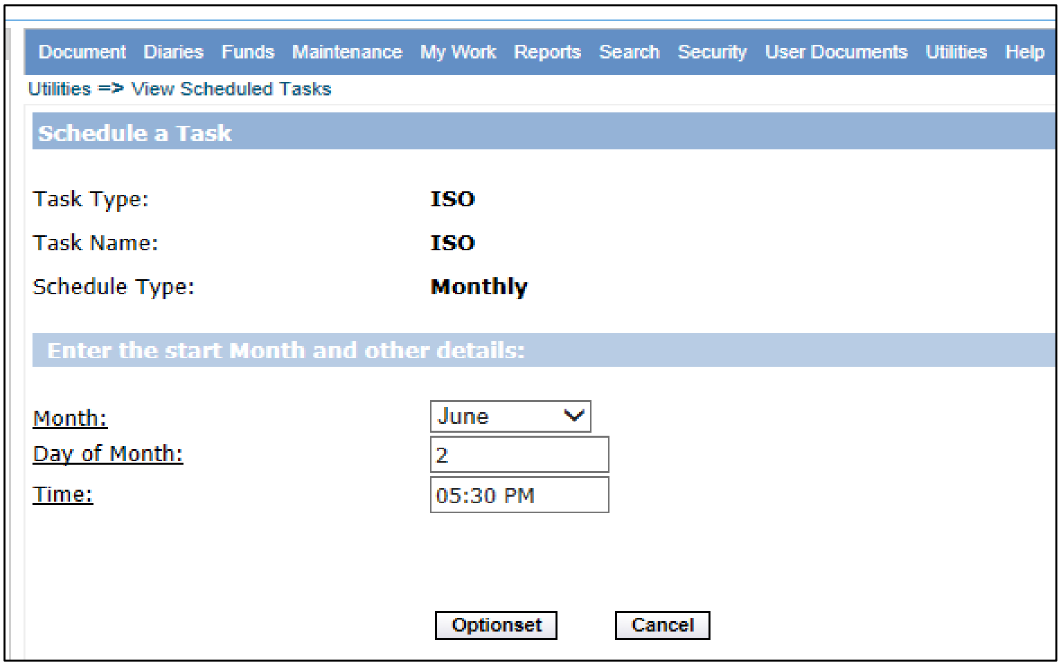
Enter Start Date and Time:

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. **Note:** You can select more than one day to run 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.

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.



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:

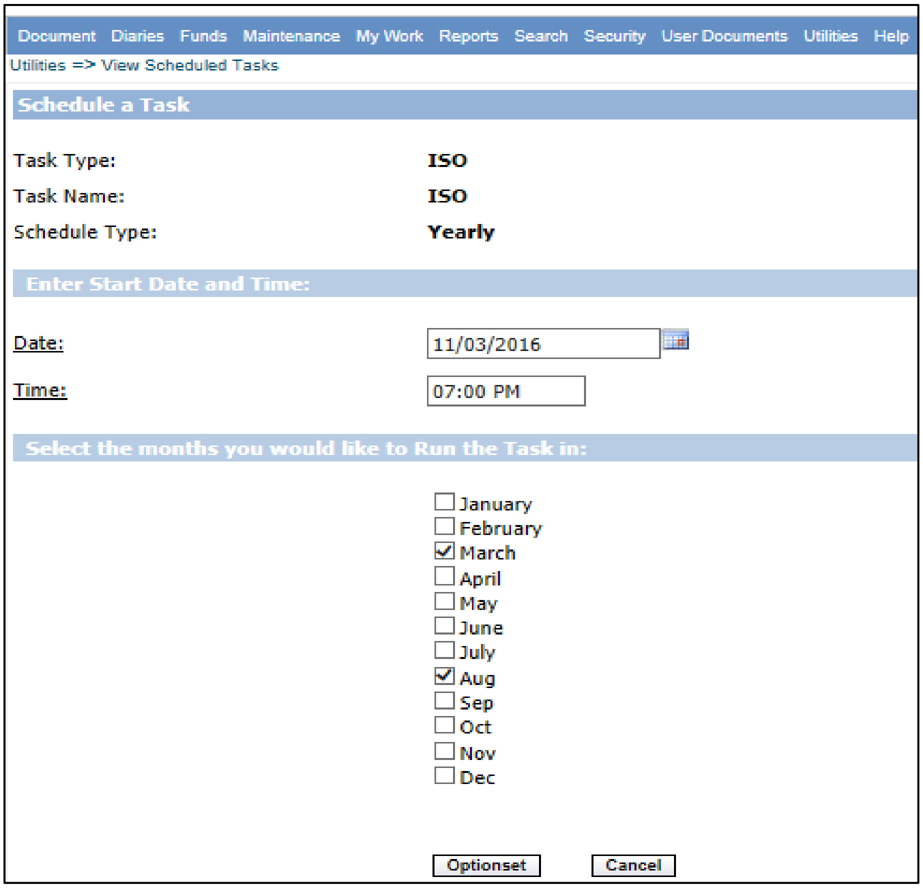
   Enter the start Month and other details:

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.

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 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.



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:

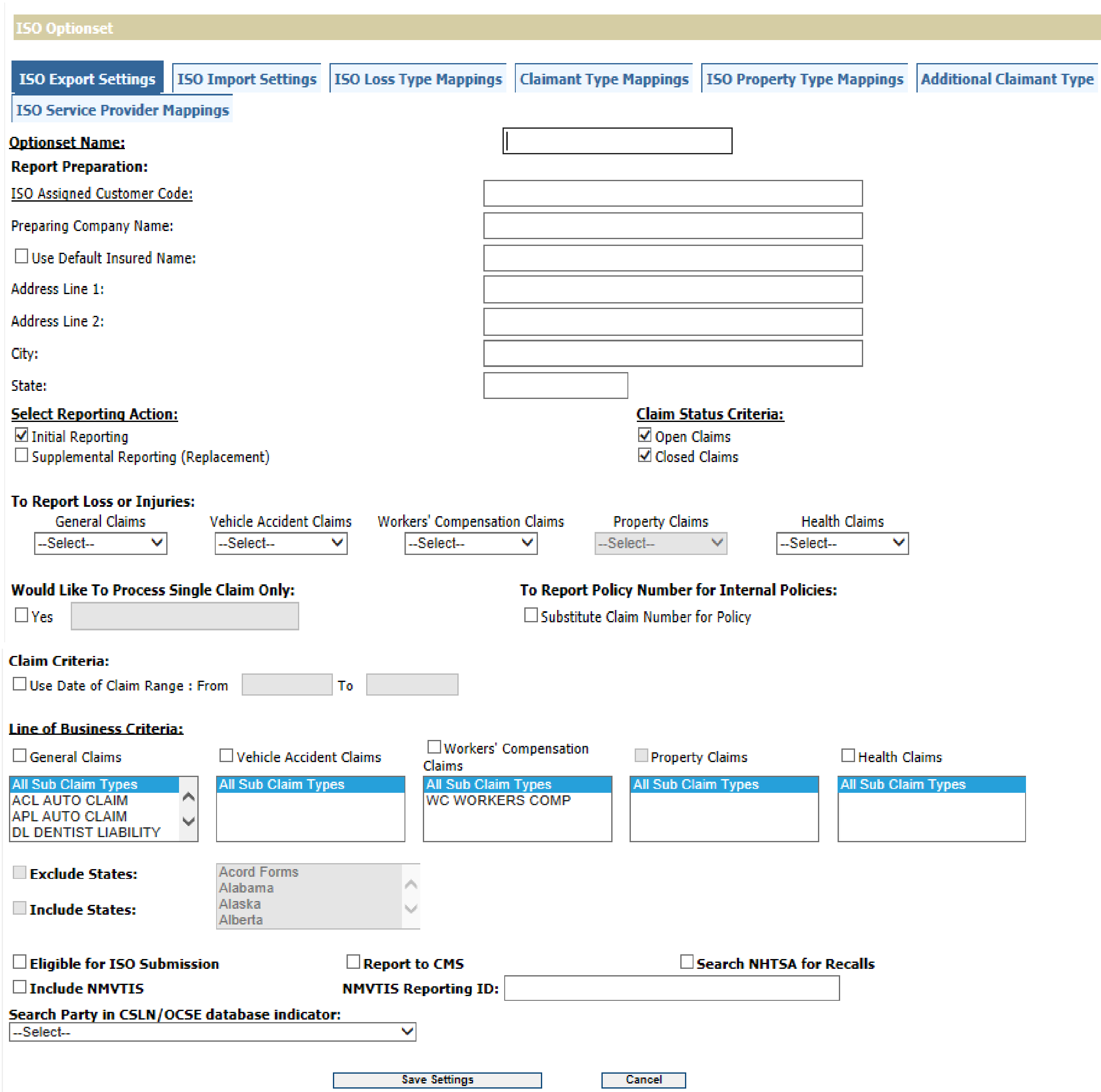
Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Select the months you would like to Run the Task in:	Select the check box for the month in which you want to schedule the task to run. **Note:** You can select more than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

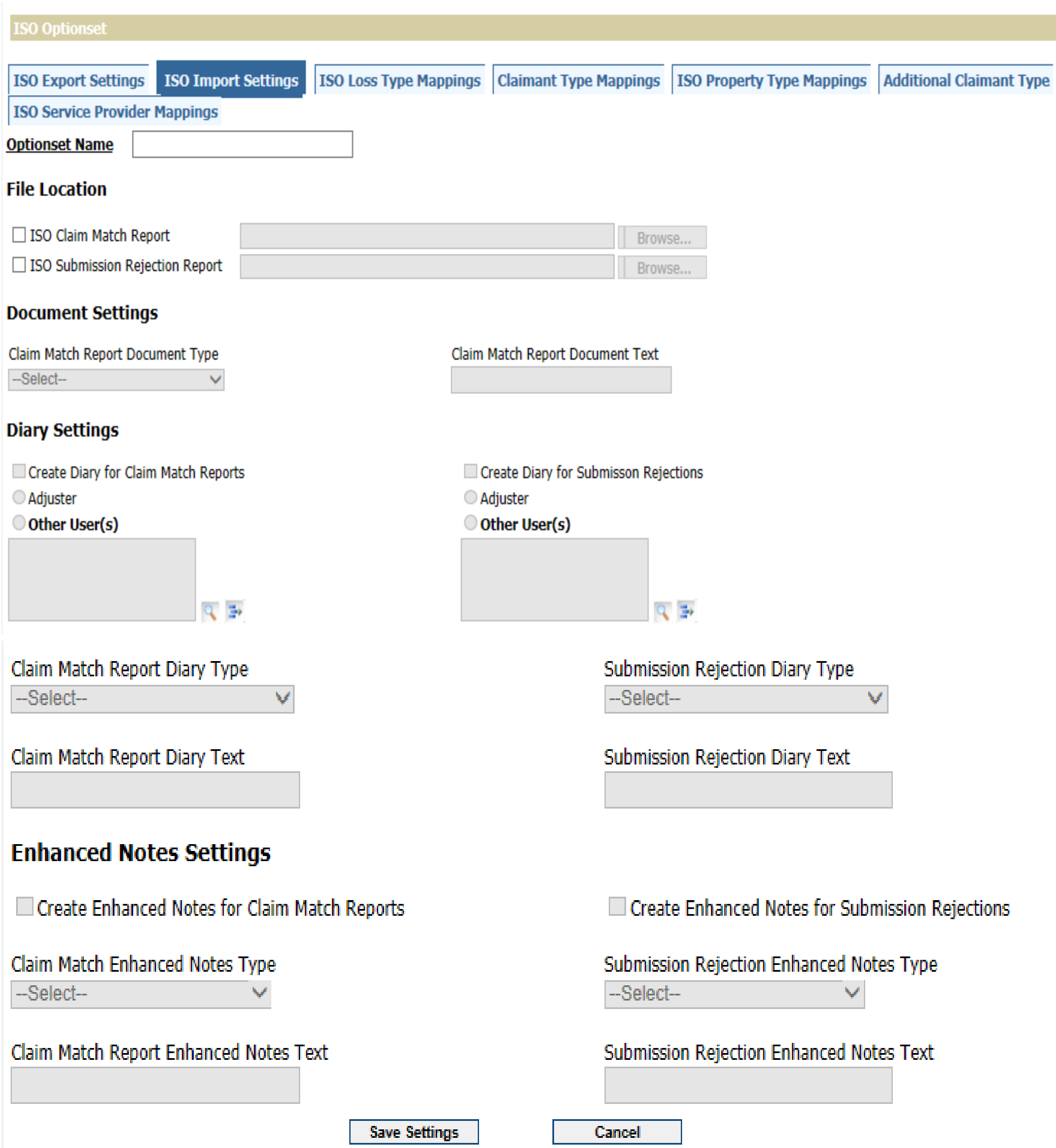
ISO Optionset window

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

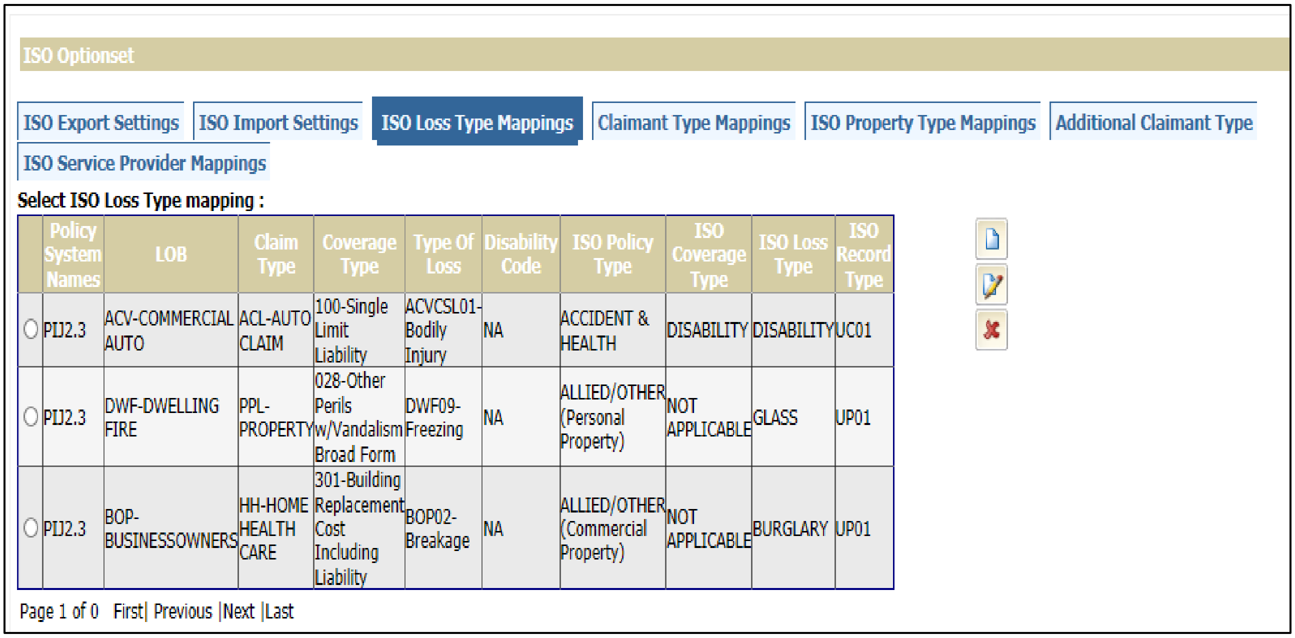
ISO Export Settings



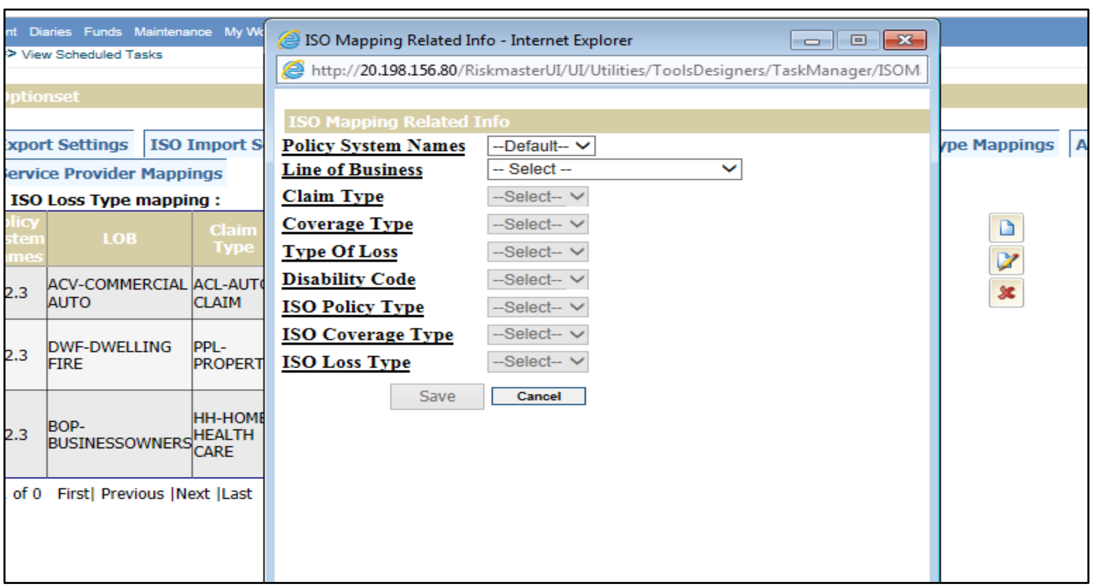
ISO Import Settings



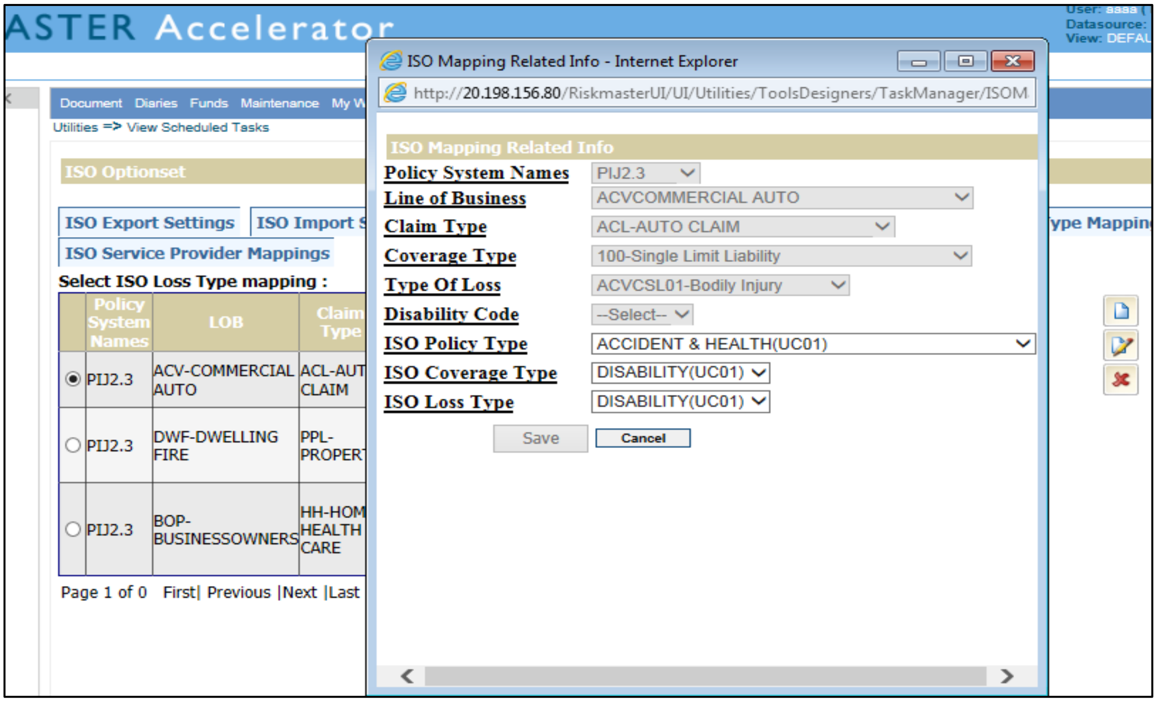
ISO Loss Type Mappings



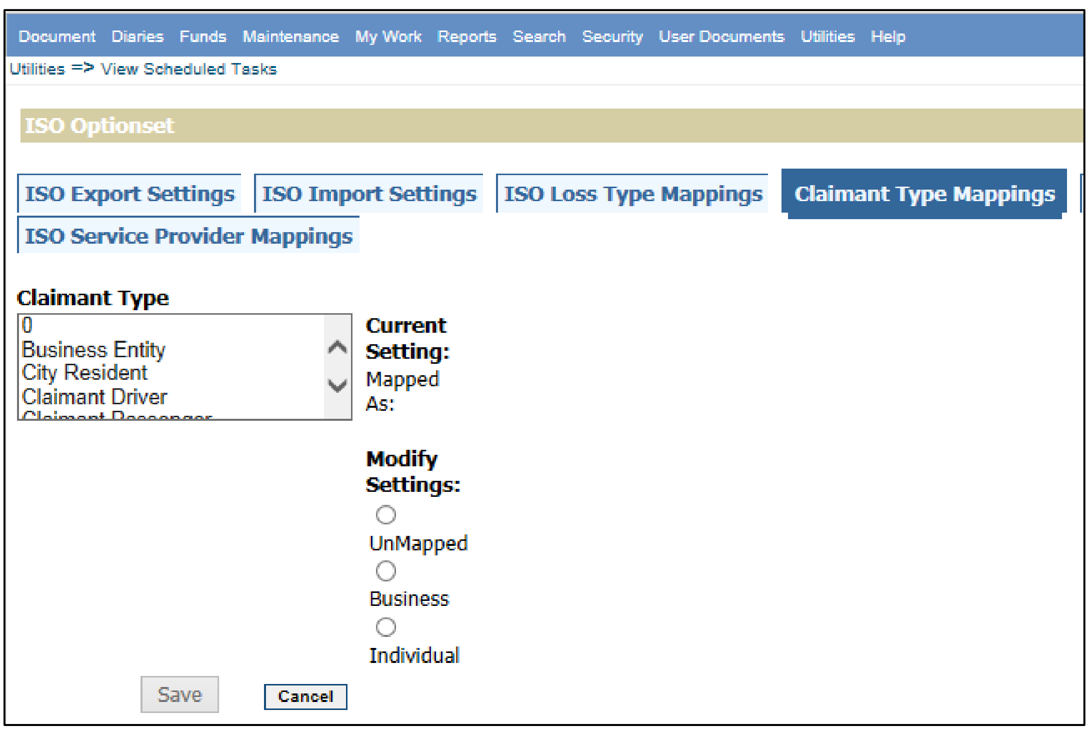
- **Creating new ISO Loss Type Mapping**



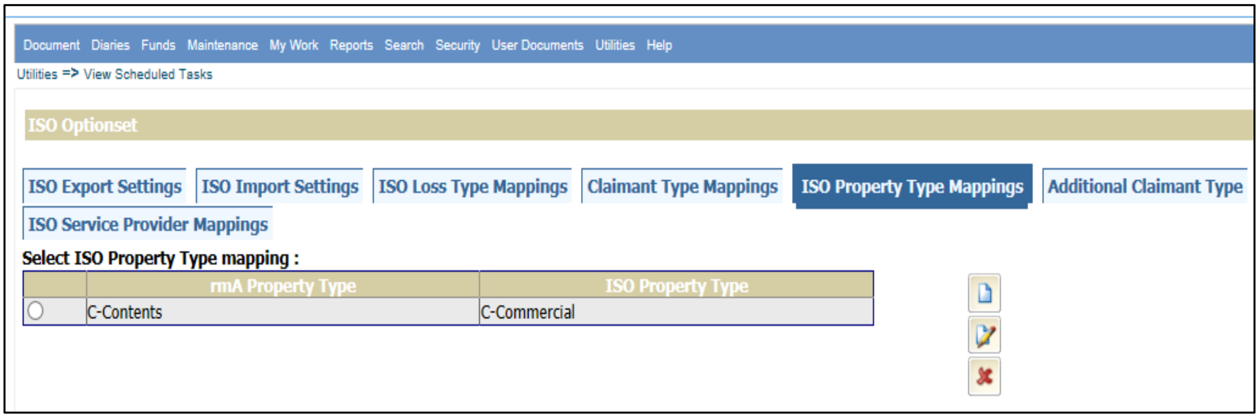
- **Modify Existing ISO Loss Type Mapping**



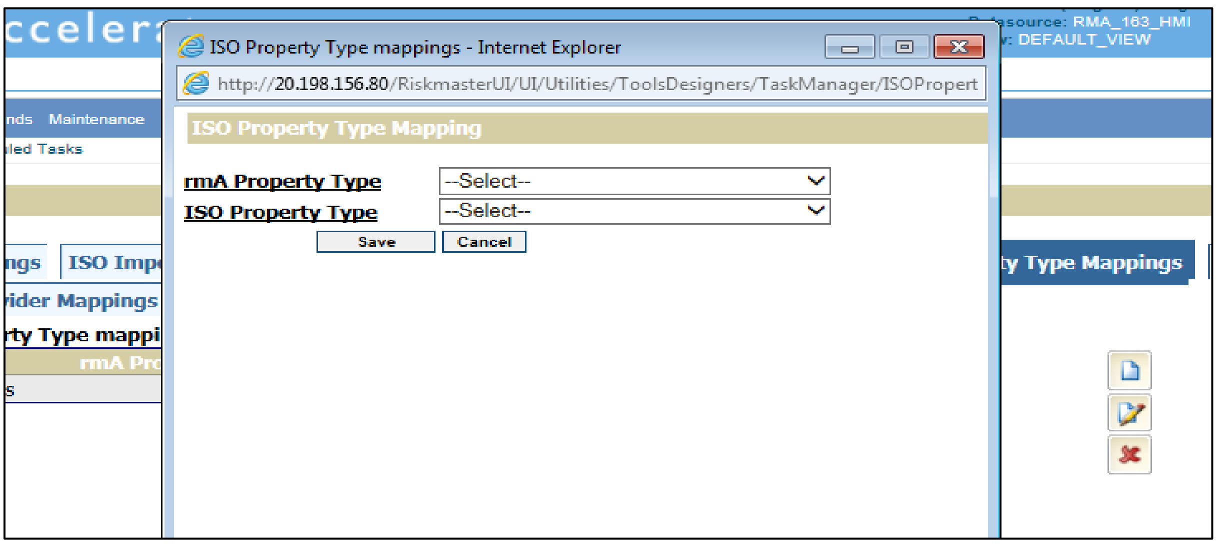
Claimant Type Mappings



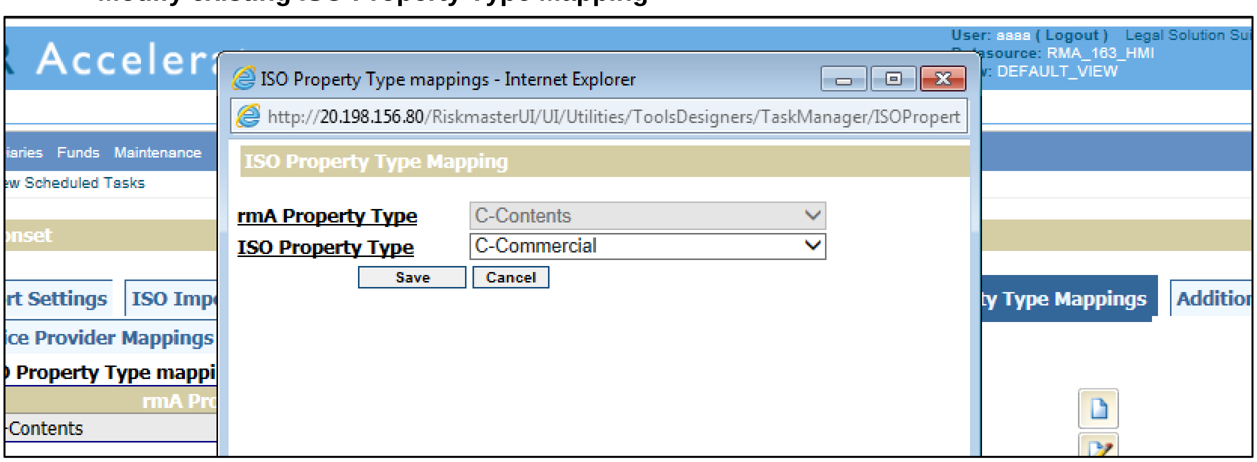
ISO Property Type Mappings



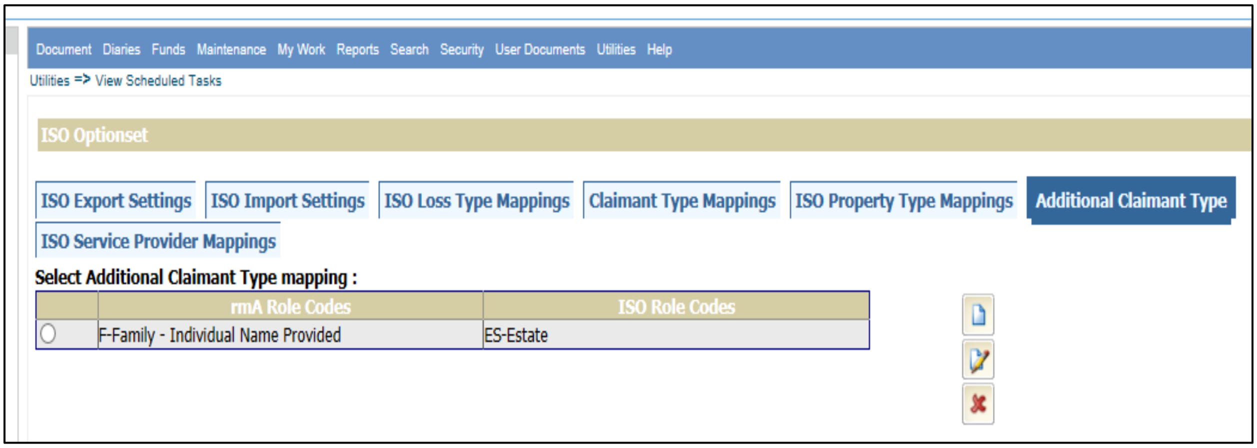
- **Adding new ISO Property Type Mapping**



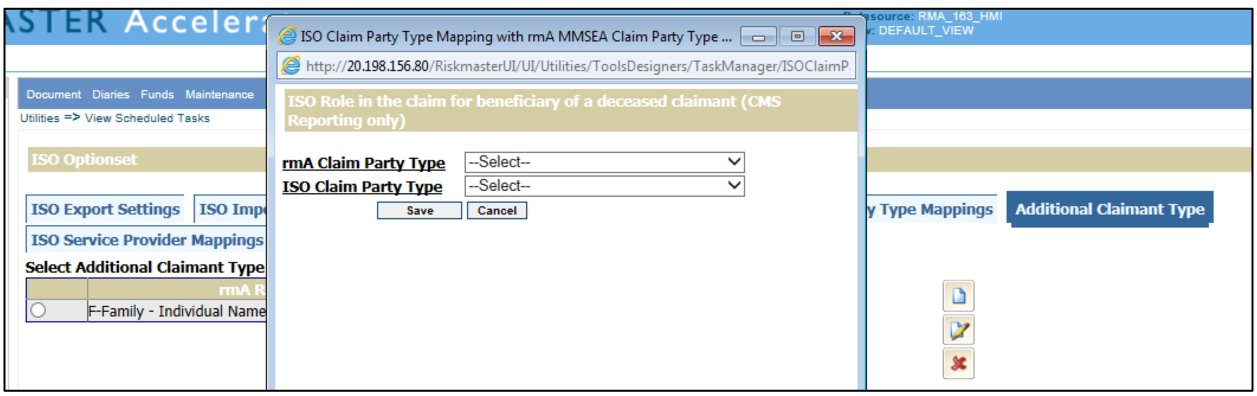
- **Modify existing ISO Property Type Mapping**



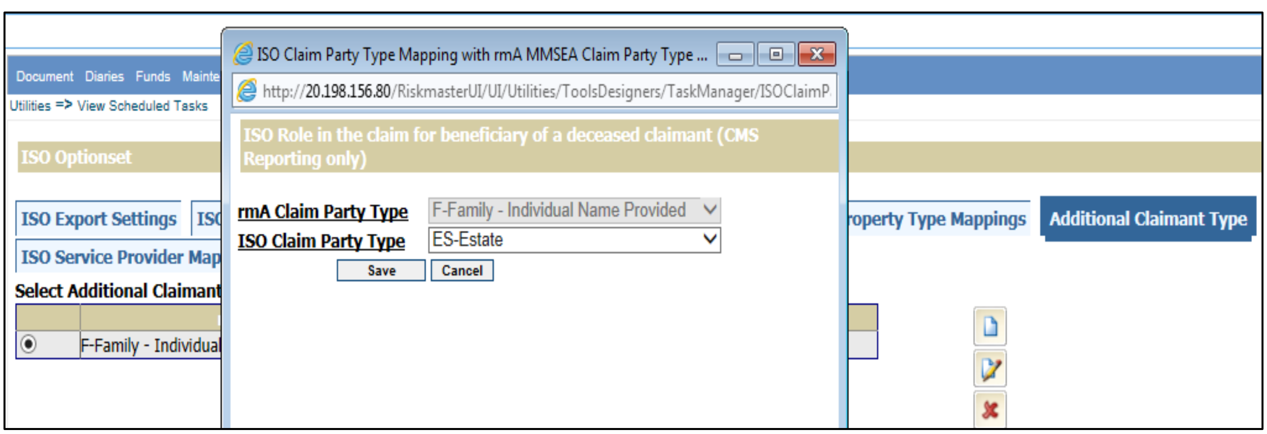
Additional Claimant Type



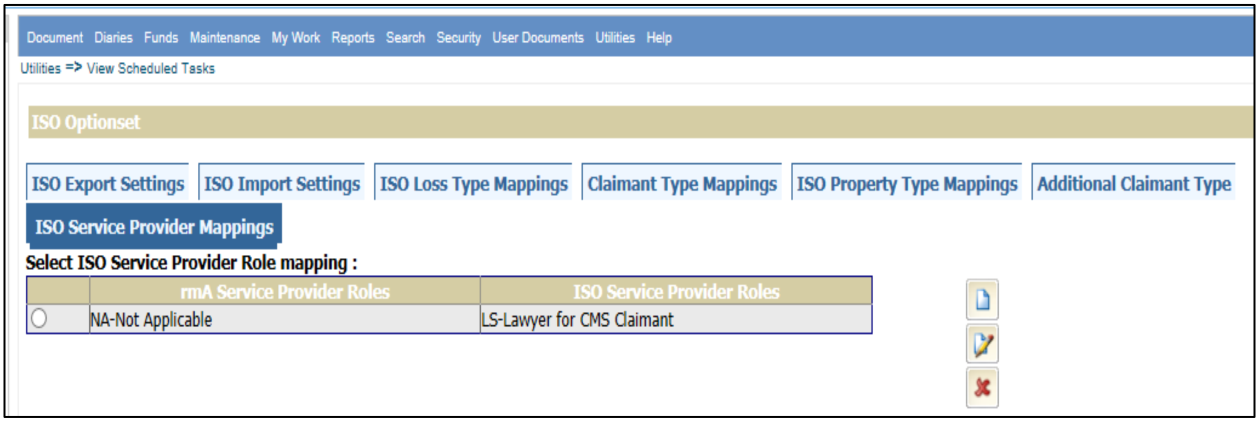
- **Adding new additional claimant type**



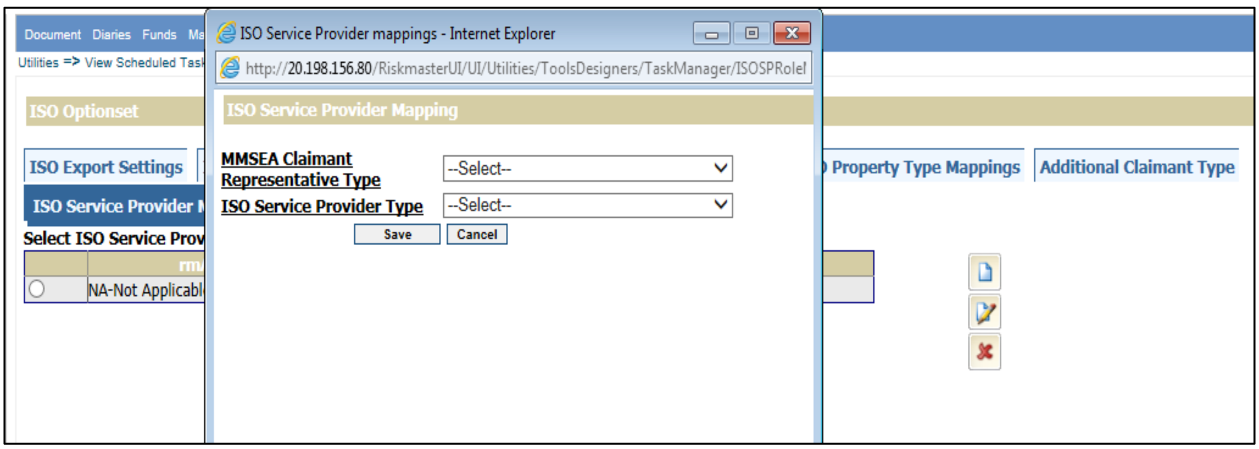
- **Modify existing additional claimant type**



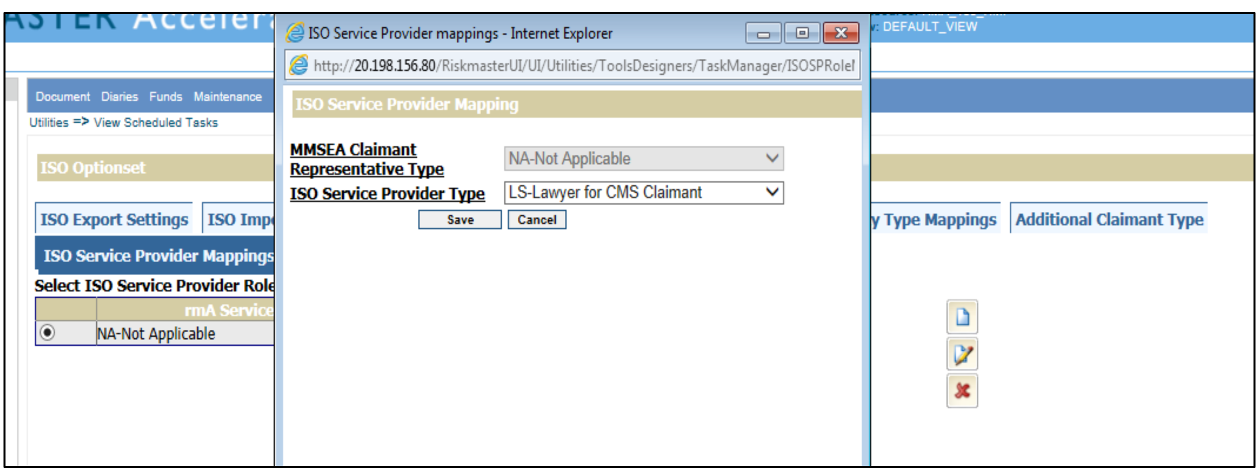
ISO Service Provider Mapping



- **Adding new ISO Service Provider Mapping**



- **Modify existing ISO Service Provider Mapping**



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. **Note:** 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. **Note:** 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.

Document Settings

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 field is enabled when the Create Diary for Submission Rejections option is selected.

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 ISO 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 ISO 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 ISO 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.

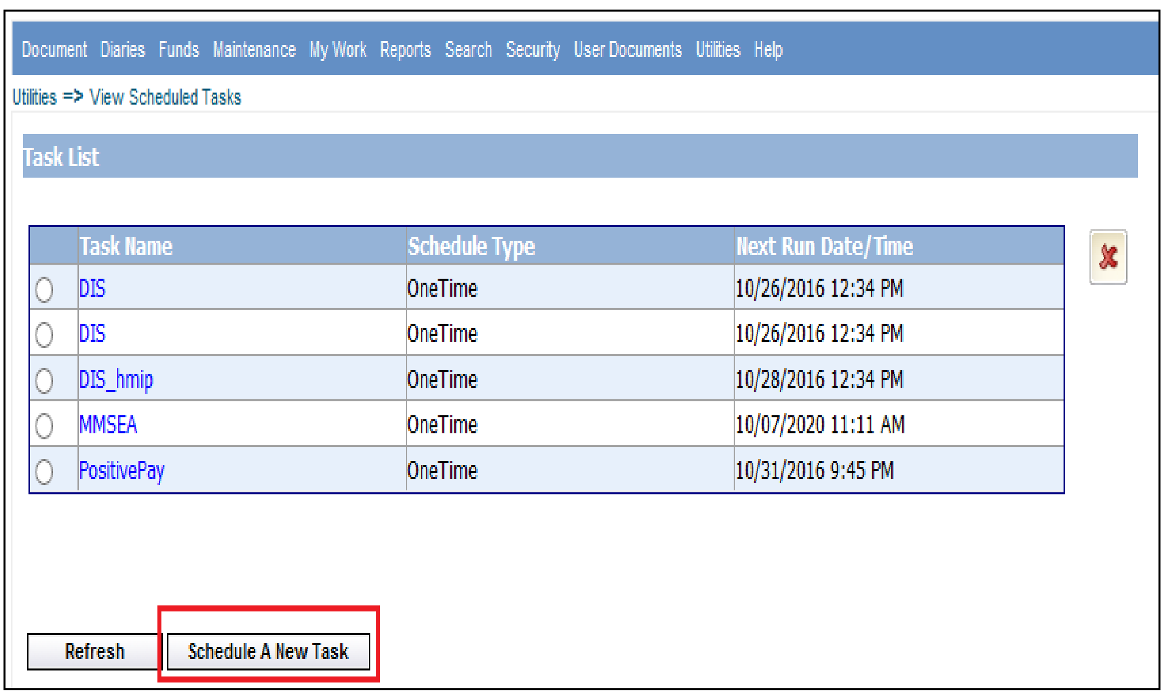
Delete Existing ISO Service Provider Mapping

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.

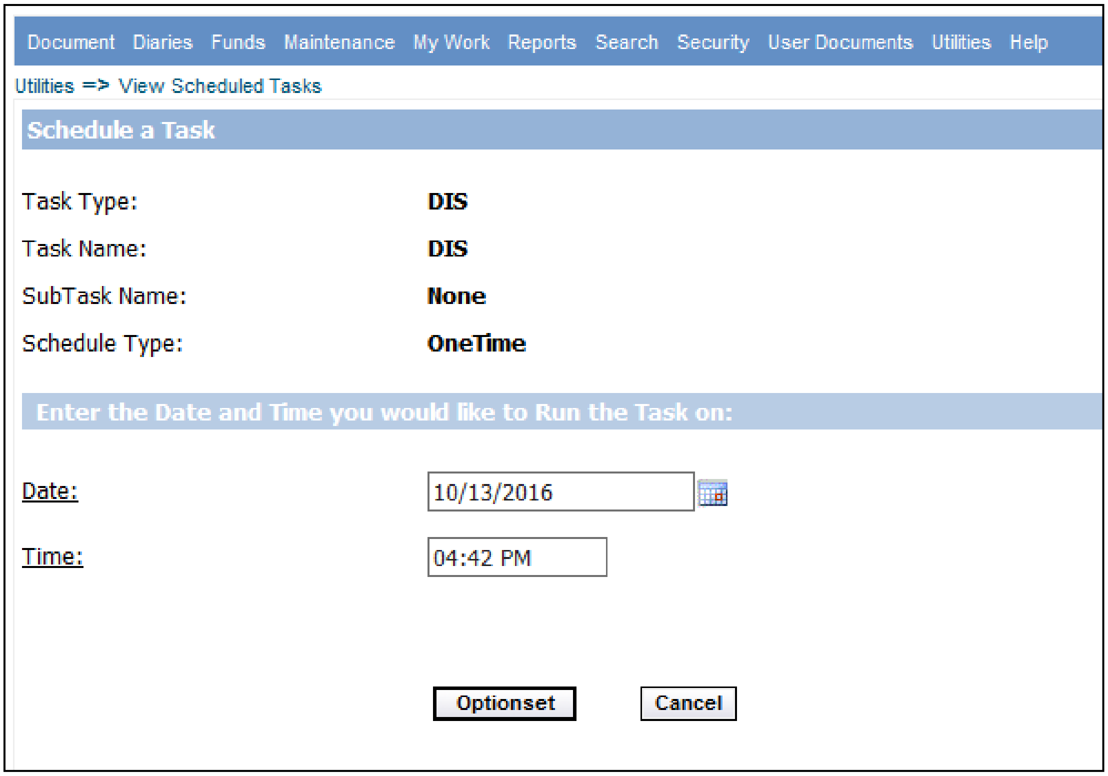
Scheduling DIS Tasks

To Schedule a DIS Task: One Time

1. From the main menu, select Utilities.
   The Utilities menu opens.
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.



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



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:

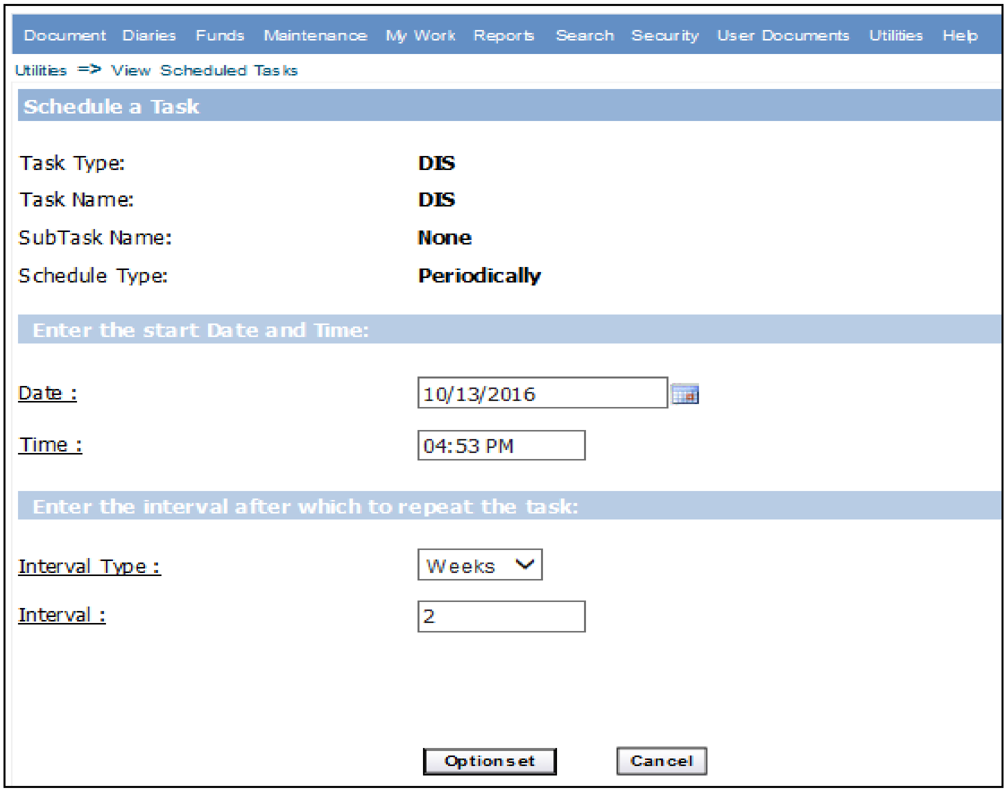
Enter the Date and Time you would like to Run the Task on:

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 changes.

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.

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.



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.

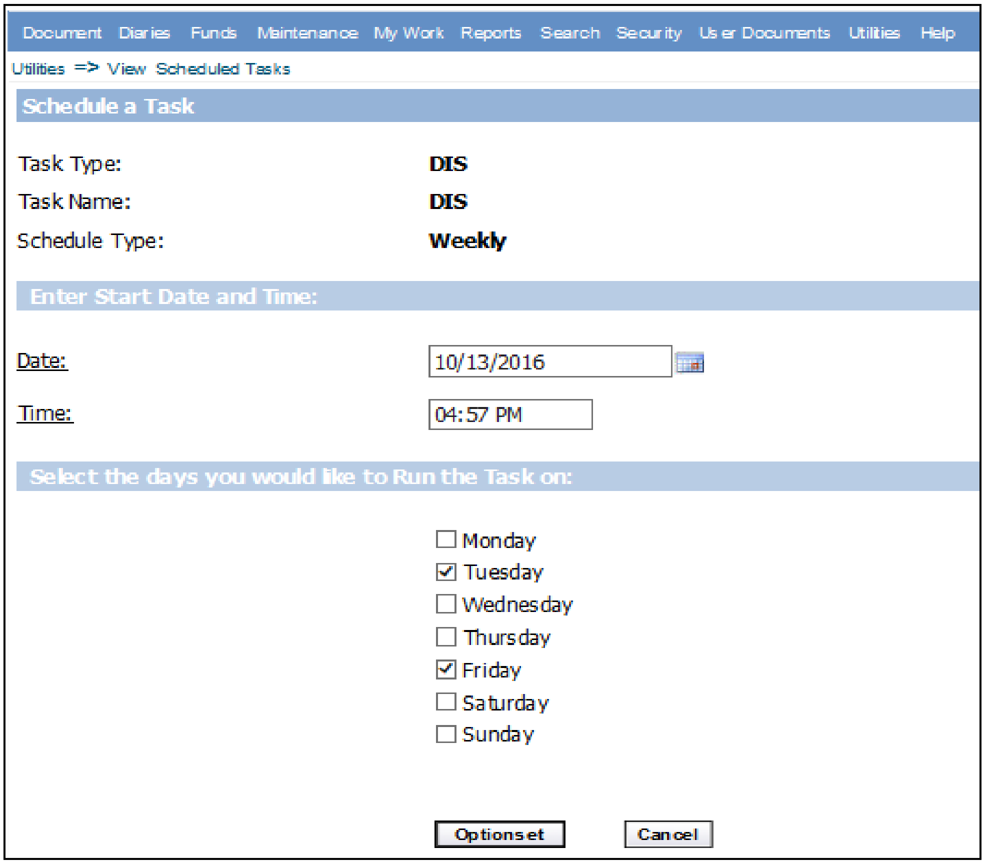
Enter the interval after which to repeat the task:

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.



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:

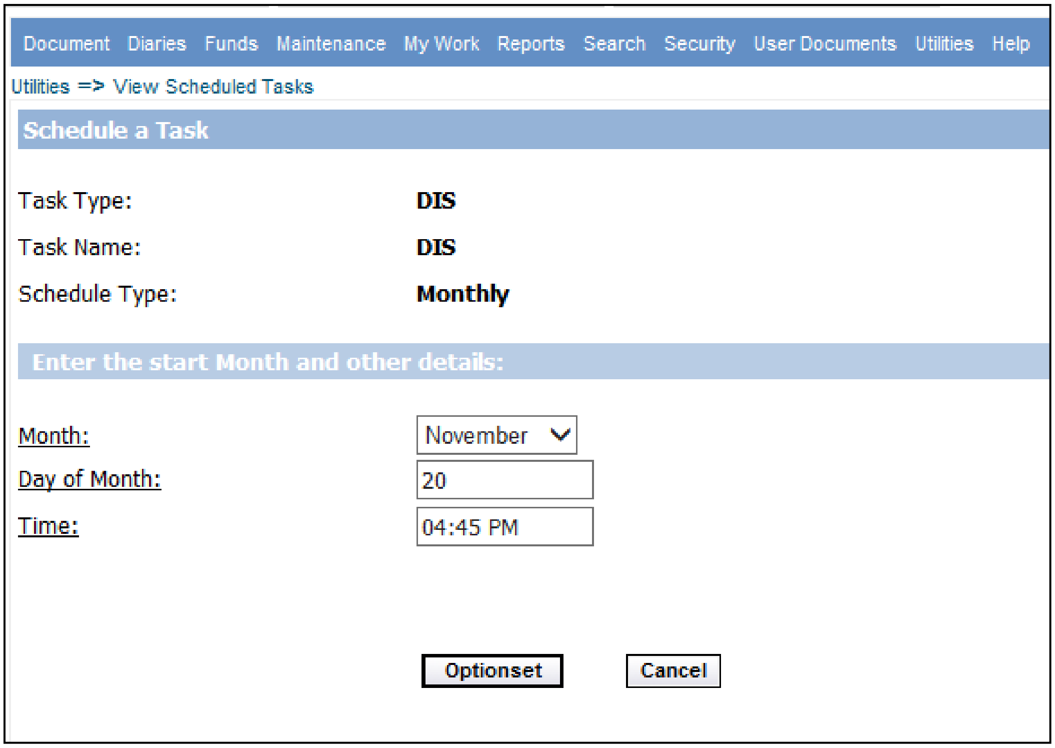
Enter Start Date and Time:

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 Run the Task on	Select the check box for a day of the week on which you want to run the scheduled task. **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.
7. 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.



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:

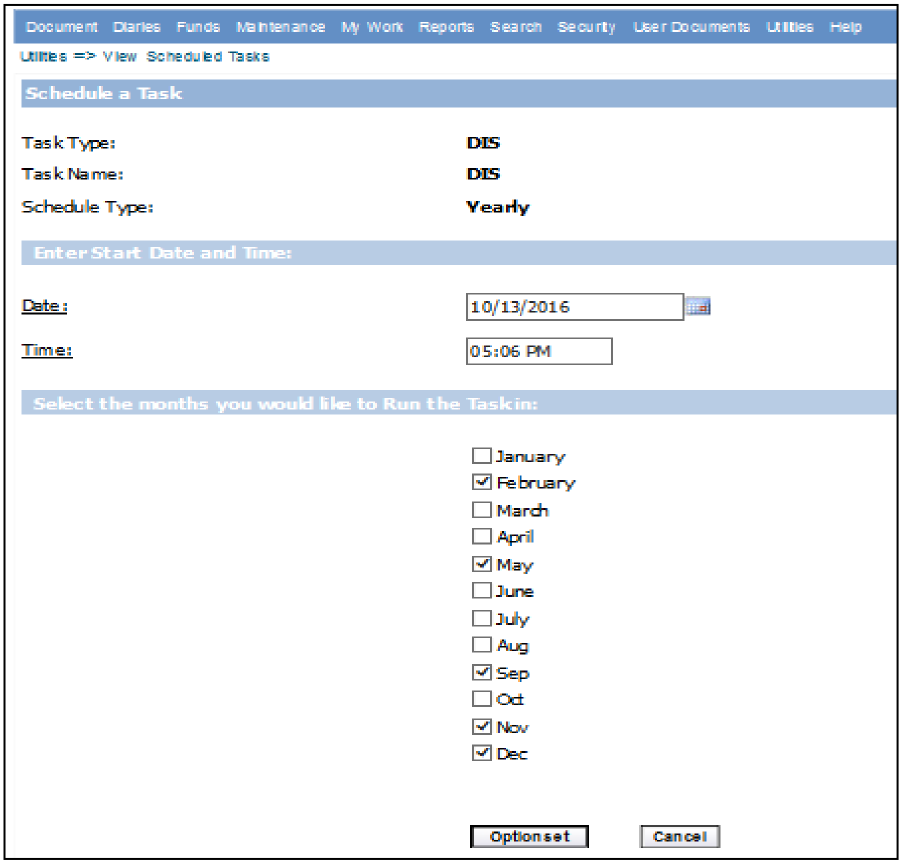
Month	From the drop down list, select the month in which you want to schedule the task.
Day of Month	Enter the date on which you want to schedule the task in the selected month.
Time	Enter the start time of the scheduled task.
Optionset	Select to open the DIS Optionset window.
Cancel	Select the button 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.



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.

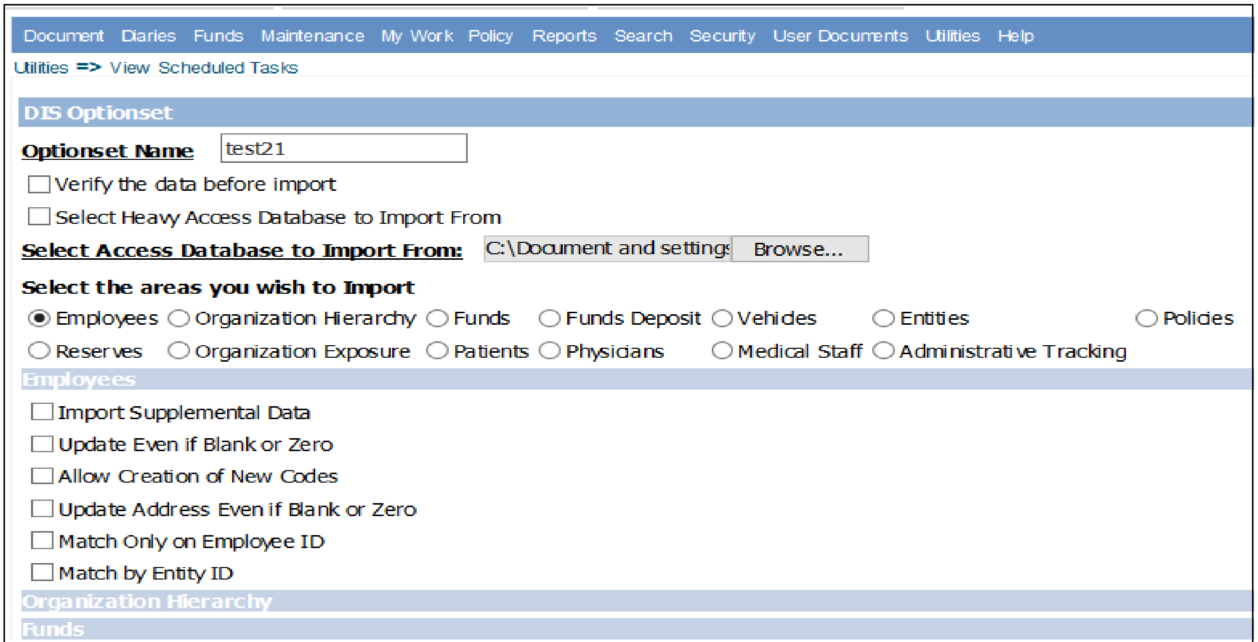
DIS Optionset window

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

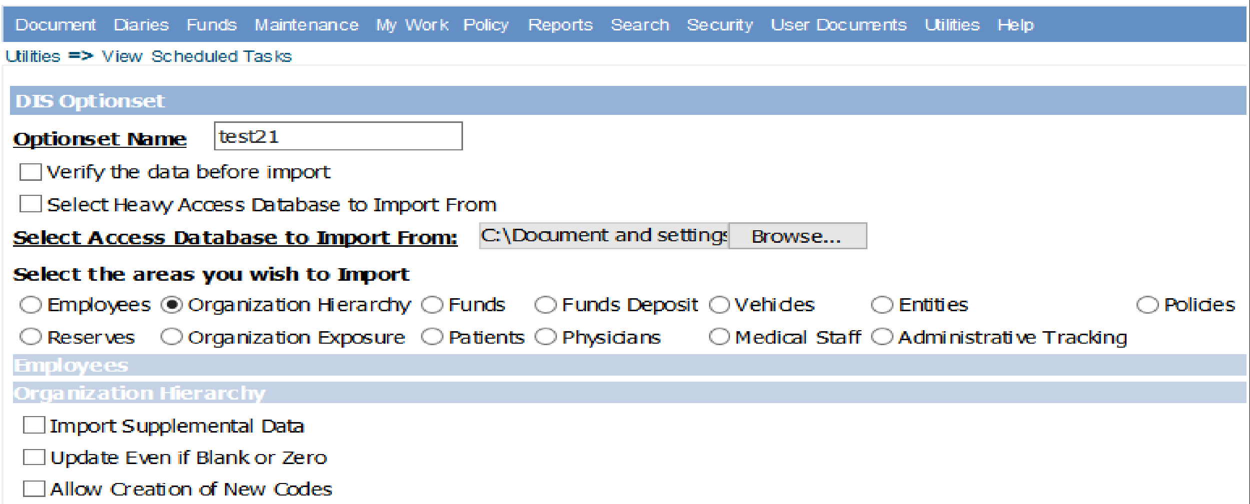
Select the areas you wish to Import

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



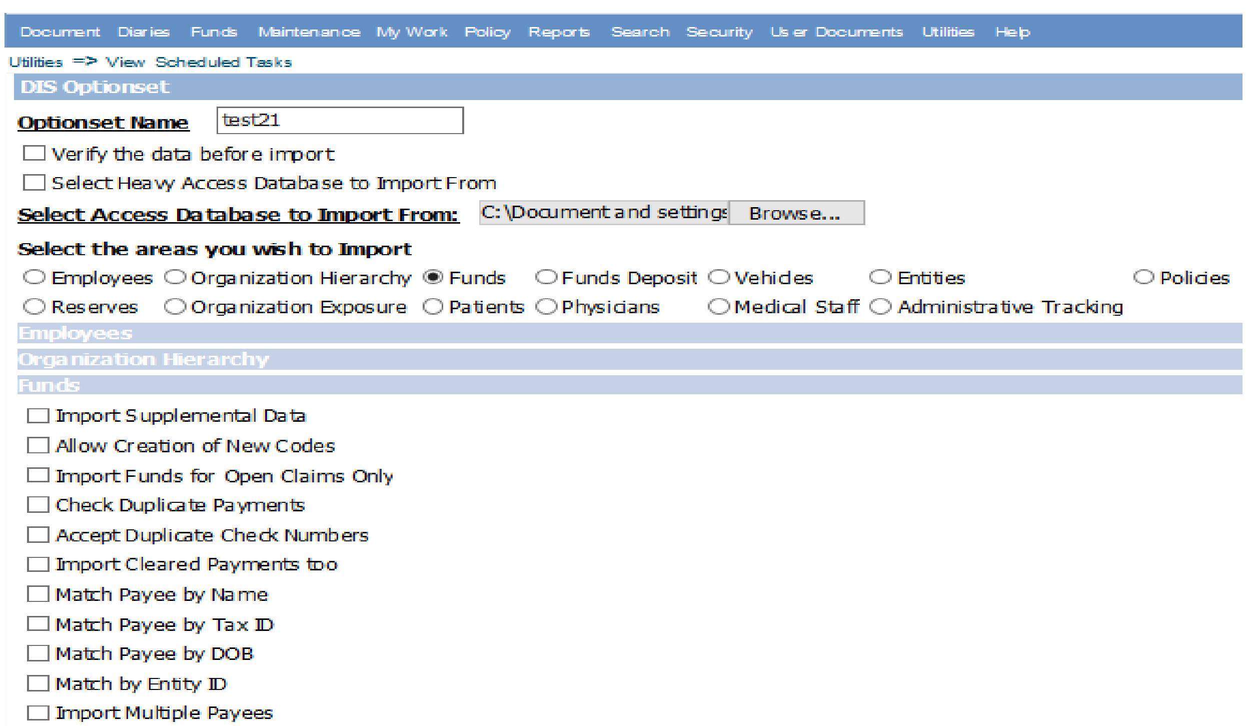
- **Import Supplemental Data** — Select the check box if you want to import employee supplemental data.
- **Update Even if Blank or Zero** — Select the check box if you want to import fields even when their value is either blank or zero.
- **Allow Creation of New Codes** — Select the check box if you 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 Hierarchy data.



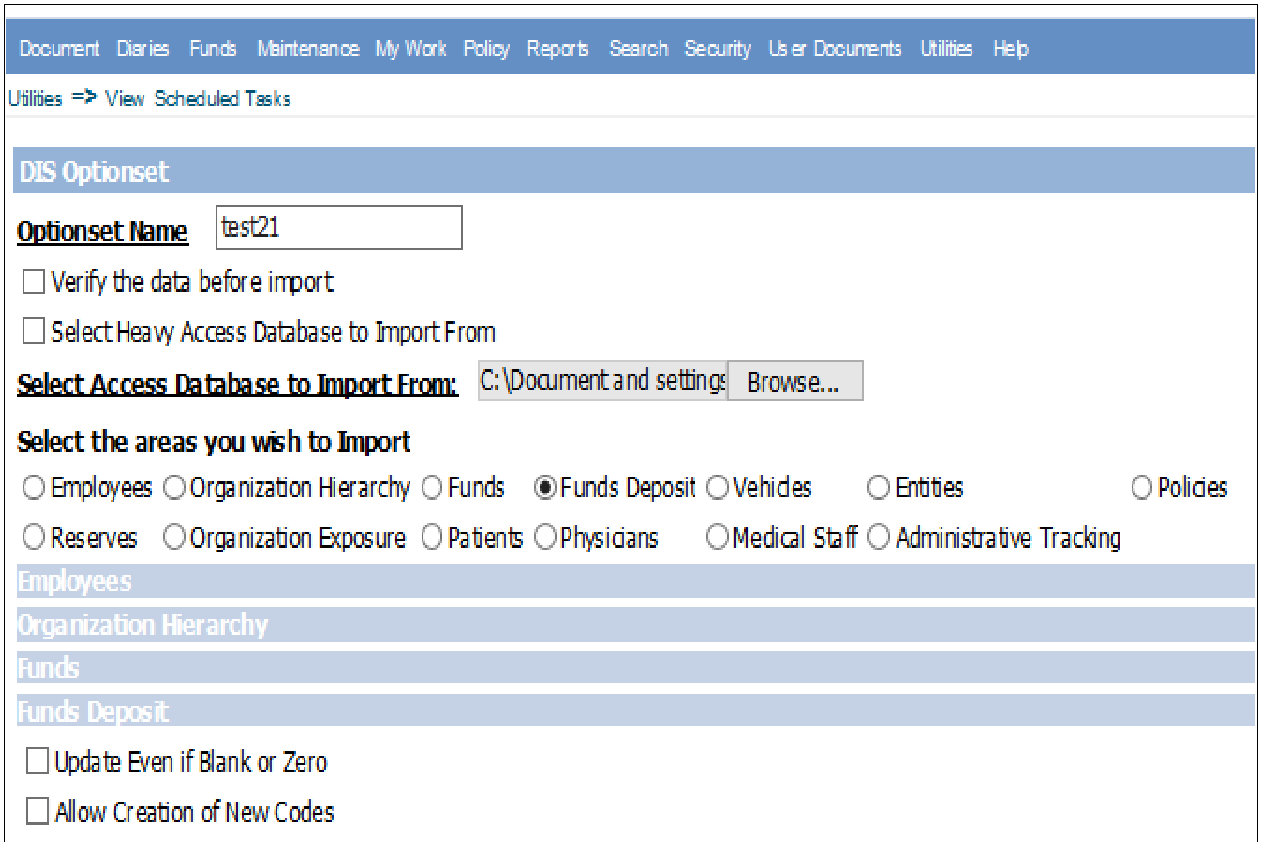
- **Import Supplemental Data** Select the check box if you want to import Organizational Hierarchy supplemental data.
- **Update Even if Blank or Zero** Select the check box if you want to import fields even when the value in them is either blank or zero.
- **Allow Creation of New Codes** Select the check box if you want to allow user to create new codes in RISKMASTER X.

Funds	Select the option if you want to import funds data.



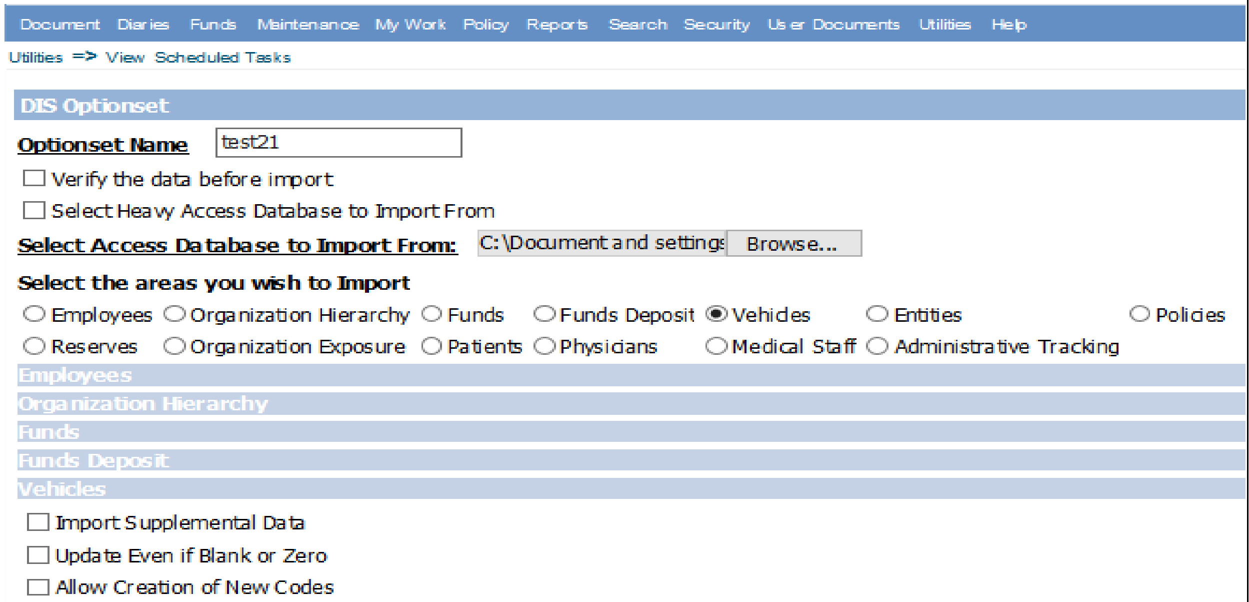
▪ **Import Supplemental Data**	Select the check box if you want to import funds supplemental data.
▪ **Allow Creation of New Codes**	Select the check box if you want to allow user to create new codes in RISKMASTER X.
▪ **Import Funds for Open Claims Only**	Select the check box if you want to import funds records for claims with claim status as ‘Open’.
▪ **Check Duplicate Payments**	Select the check box if you want do not want to import duplicate payments.
▪ **Accept Duplicate Checks Numbers**	Select the check box if you want to import duplicate check numbers.
▪ **Import Cleared Payments too**	Select the check box if you want to import payments with a cleared status.
▪ **Match Payee by Name**	Select the check box if you want to search for payee records using the payee name.
▪ **Match Payee by Tax ID**	Select the check box if you want to search for payee records using the payee tax Identification number.
▪ **Match Payee by DOB**	Select the check box if you want to search for payee records using the payee date of birth.
▪ **Match by Entity ID**	Select the check box if you want to search for payee records using the entity Identification number
▪ **Import 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.



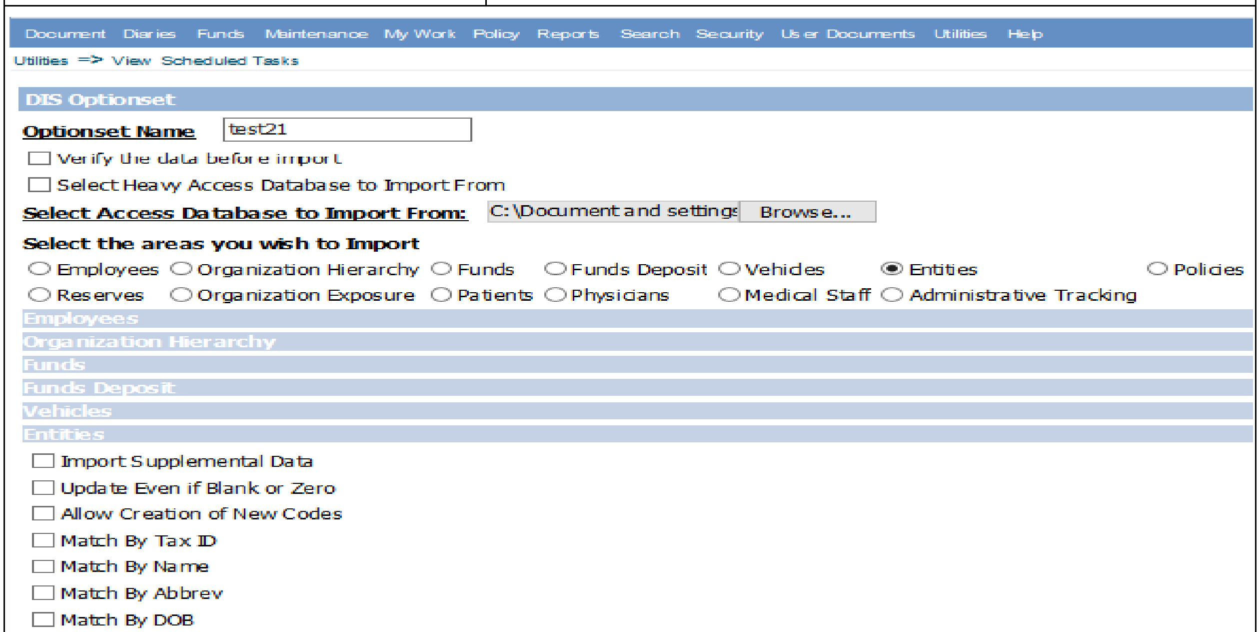
▪ **Update Even if Blank or Zero**	Select the check box if you want to import fields even when the value in them is either blank or zero.
▪ **Allow Creation of New Codes**	Select the check box if you want to allow user to create new codes in RISKMASTER X.

Vehicles	Select the option if you want to import vehicle data.



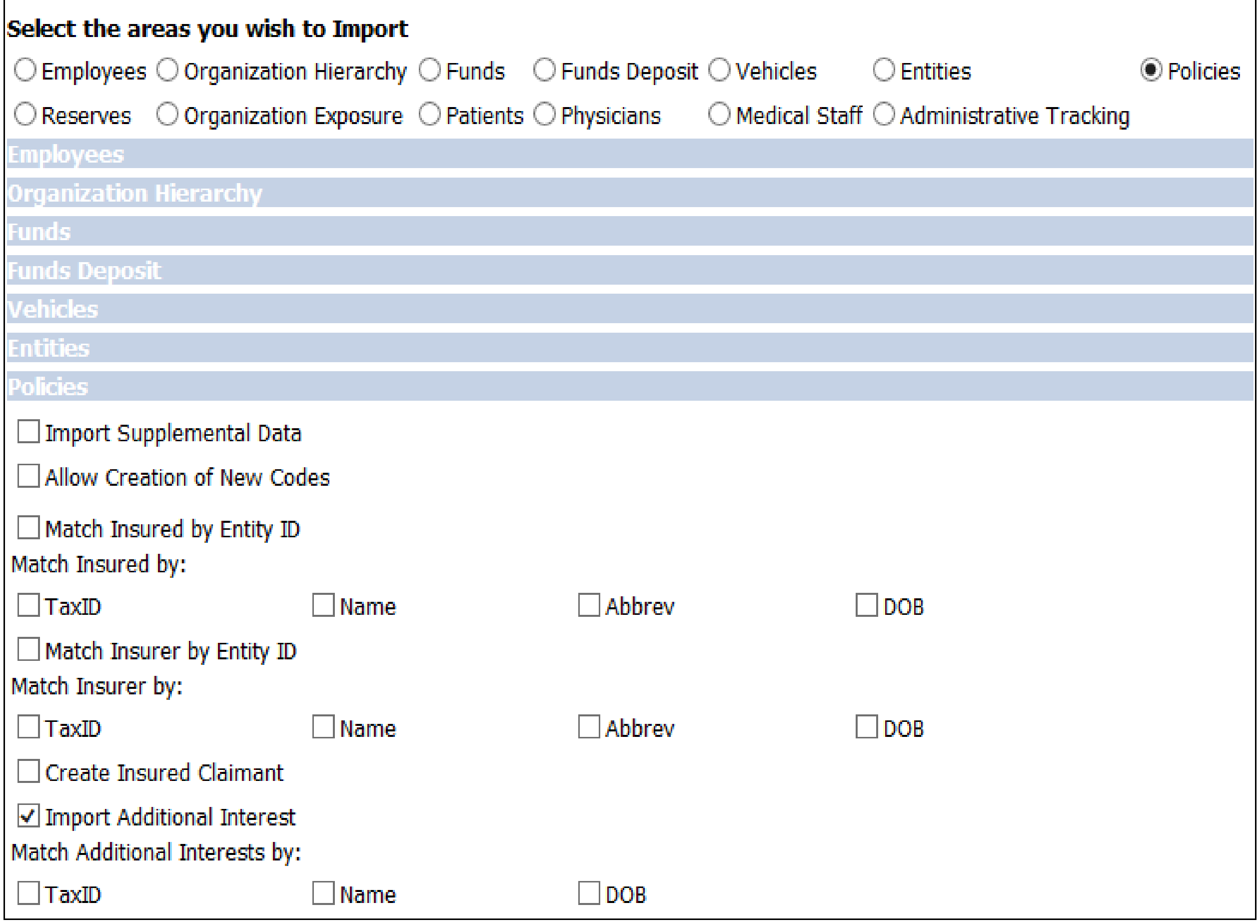
▪ **Import Supplemental Data**	Select the check box if you want to import vehicle supplemental data.
▪ **Update Even if Blank or Zero**	Select the check box if you want to import fields even when the value in them is either blank or zero.
▪ **Allow Creation of New Codes**	Select the check box if you want to allow user to create new codes in RISKMASTER X.

Entities	Select the option if you want to import entities data.



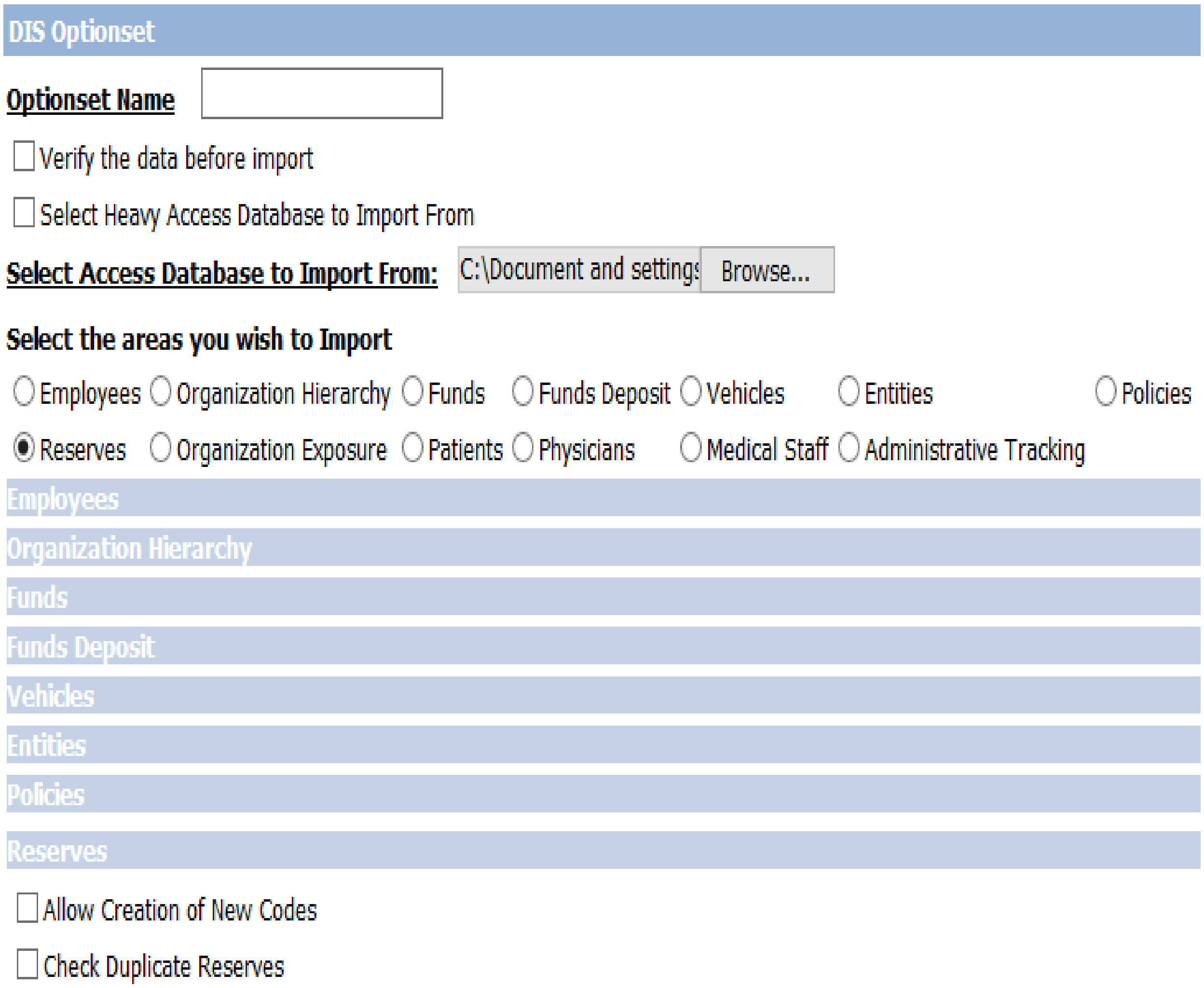
▪ **Import Supplemental Data**	Select the check box if you want to import entities supplemental data.
▪ **Update Even if Blank or Zero**	Select the check box if you want to import fields even when the value in them is either blank or zero.
▪ **Allow Creation of New Codes**	Select the check box if you 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	Select the option if you want to import policies data.



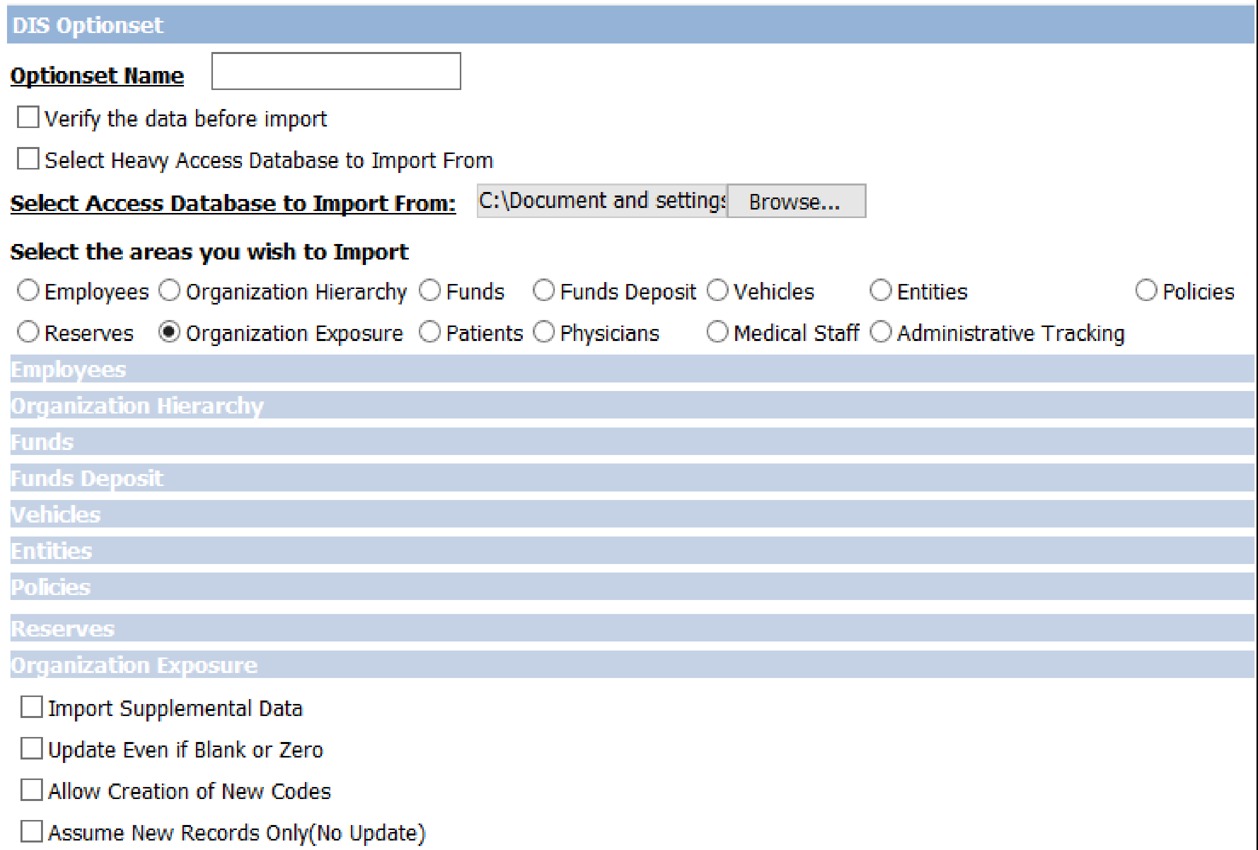
▪ **Import Supplemental Data**	Select the check box if you want to import policy supplemental data.
▪ **Allow Creation of New Codes**	Select the check box if you want to allow user to create new codes in RISKMASTER X.
▪ **Match Insured by Entity ID**	Select the check box if you want to search insured 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.



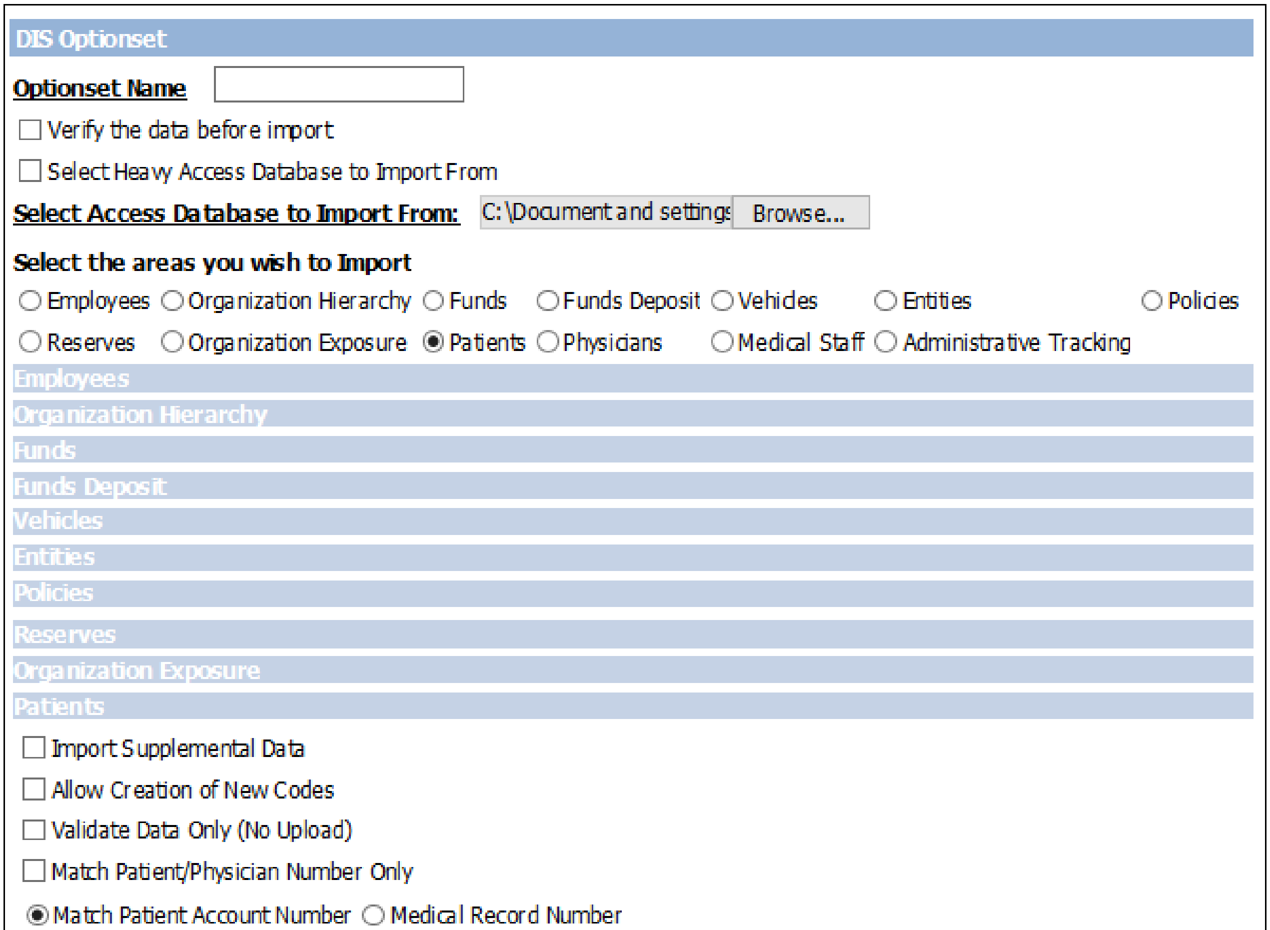
▪ **Allow Creation of New Codes**	Select the check box if you want to allow user to create new codes in RISKMASTER X.
▪ **Check Duplicate Reserves**	Select the check box if you do not want to import duplicate reserves.

Organizational Exposure	Select the option if you want to import organizational exposure data.



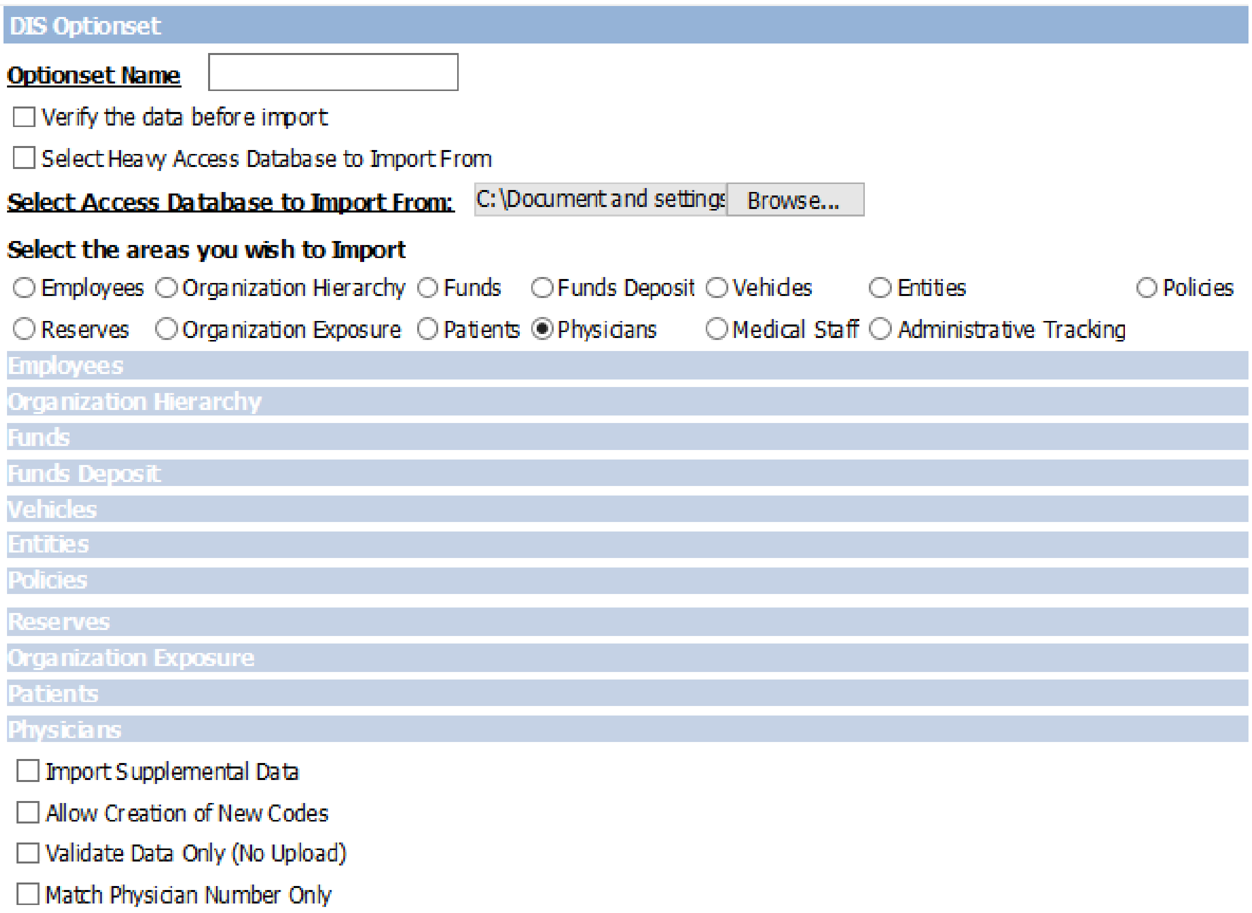
▪ **Import Supplemental Data**	Select the check box if you want to import Organizational Exposure supplemental data.
▪ **Update Even if Blank or Zero**	Select the check box if you want to import fields even when the value in them is either blank or zero.
▪ **Allow Creation of New Codes**	Select the check box if you want to allow user to create new codes in RISKMASTER X.
▪ **Assume New Records Only (no update)**	Select the check box if you want to import all records as new records.

Patients	Select the option if you want to import patient’s data.



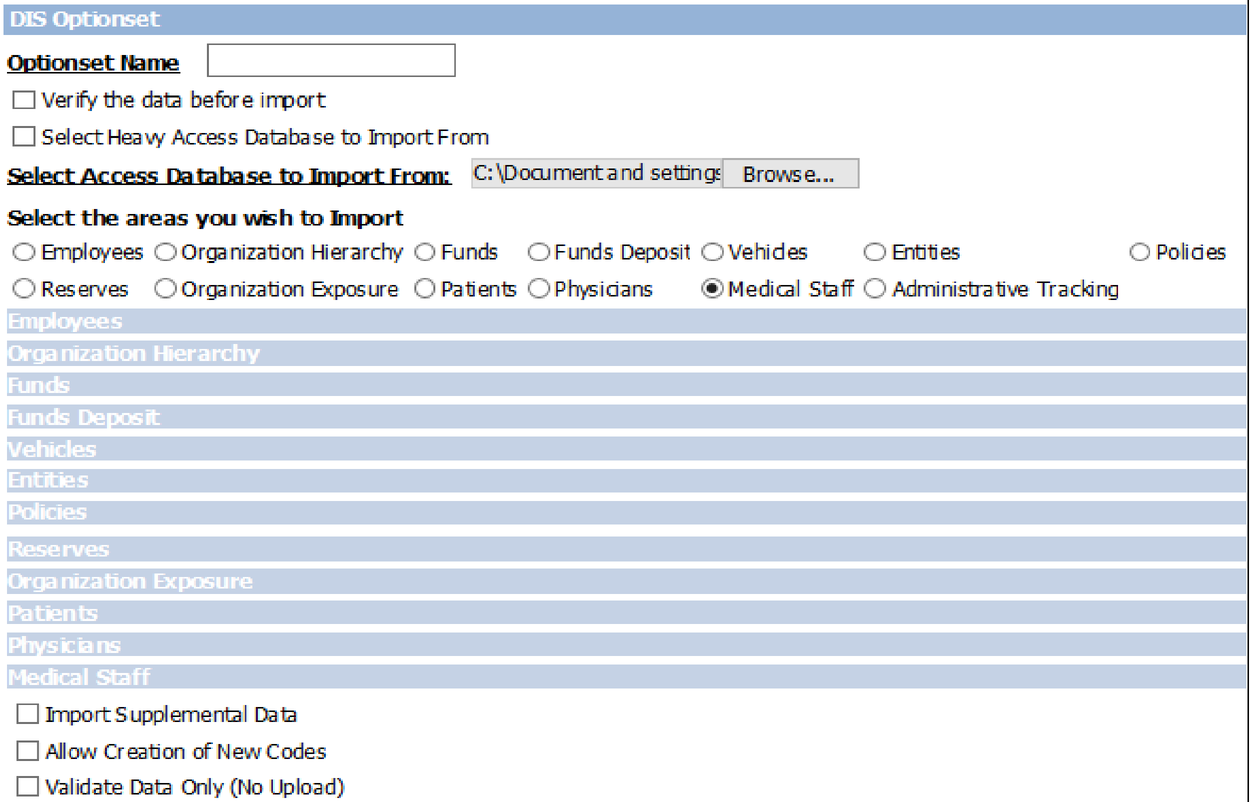
▪ **Import Supplemental Data**	Select the check box if you want to import patient supplemental data.
▪ **Allow Creation of New Codes**	Select the check box if you want to allow user to create new codes in RISKMASTER X.
▪ **Validate Data Only (No Upload)**	Select the check box if you want to only validate 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.

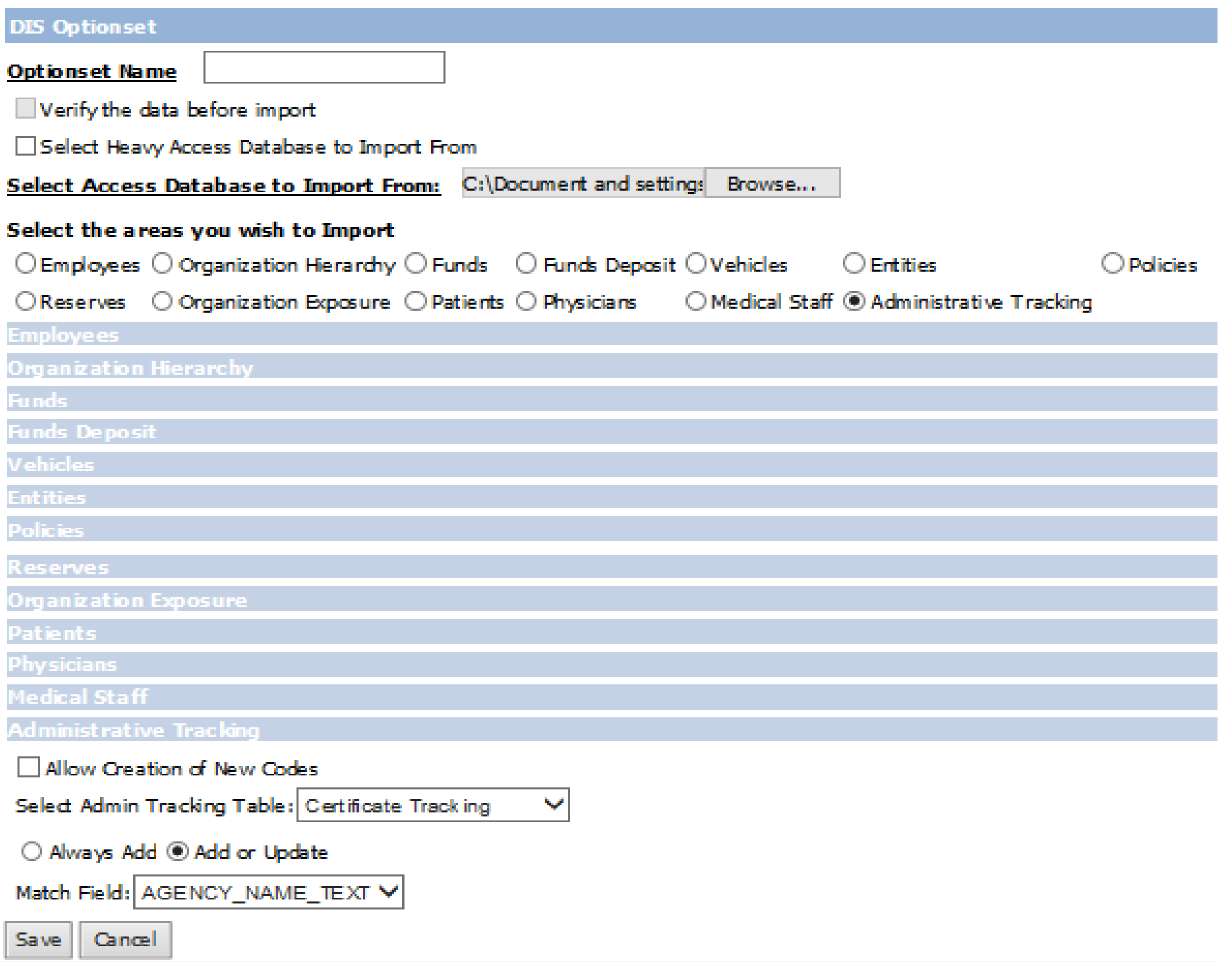


▪ **Import Supplemental Data**	Select the check box if you want to import physician supplemental data.
▪ **Allow Creation of New Codes**	Select the check box if you want to allow user to create new codes in RISKMASTER X.
▪ **Validate Data Only (No Upload)**	Select the check box if you want to validate 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.



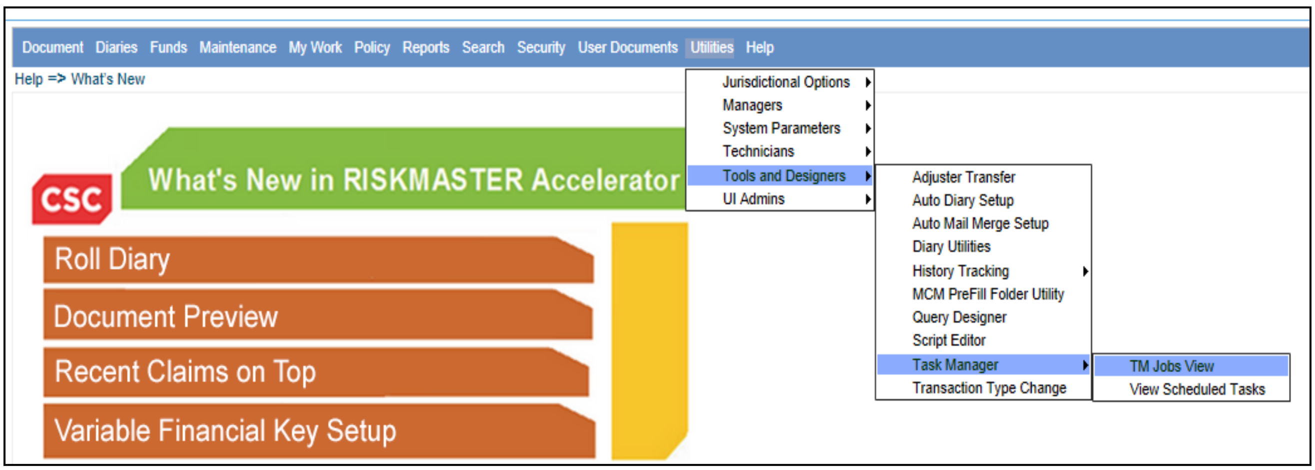
▪ **Import Supplemental Data**	Select the check box if you want to import medical staff supplemental data.
▪ **Allow Creation of New Codes**	Select the check box if you want to allow user to create new codes in RISKMASTER X.
▪ **Validate Data Only (No Upload)**	Select the check box if you want to validate medical staff data only.

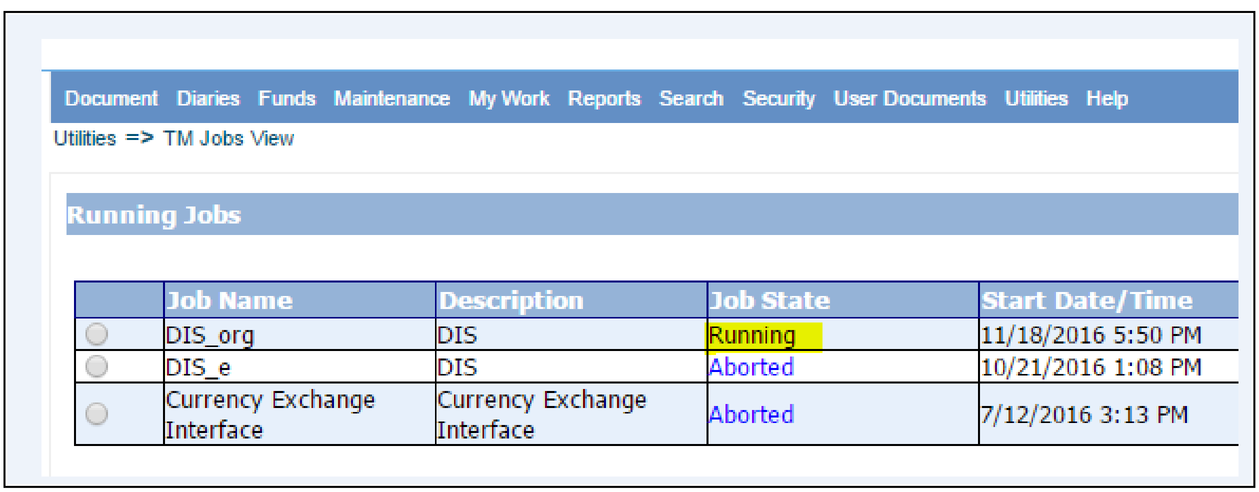
Administrative Tracking	Select the option if you want to import administrative tracking data.
	
▪ **Allow Creation of New Codes**	Select the check box if you want to allow user to create new codes in RISKMASTER X.
▪ **Select Admin Tracking Table**	From the drop down list, select the administrative tracking table that you want to import.
▪ **Always Add**	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.
▪ **Match by Field**	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

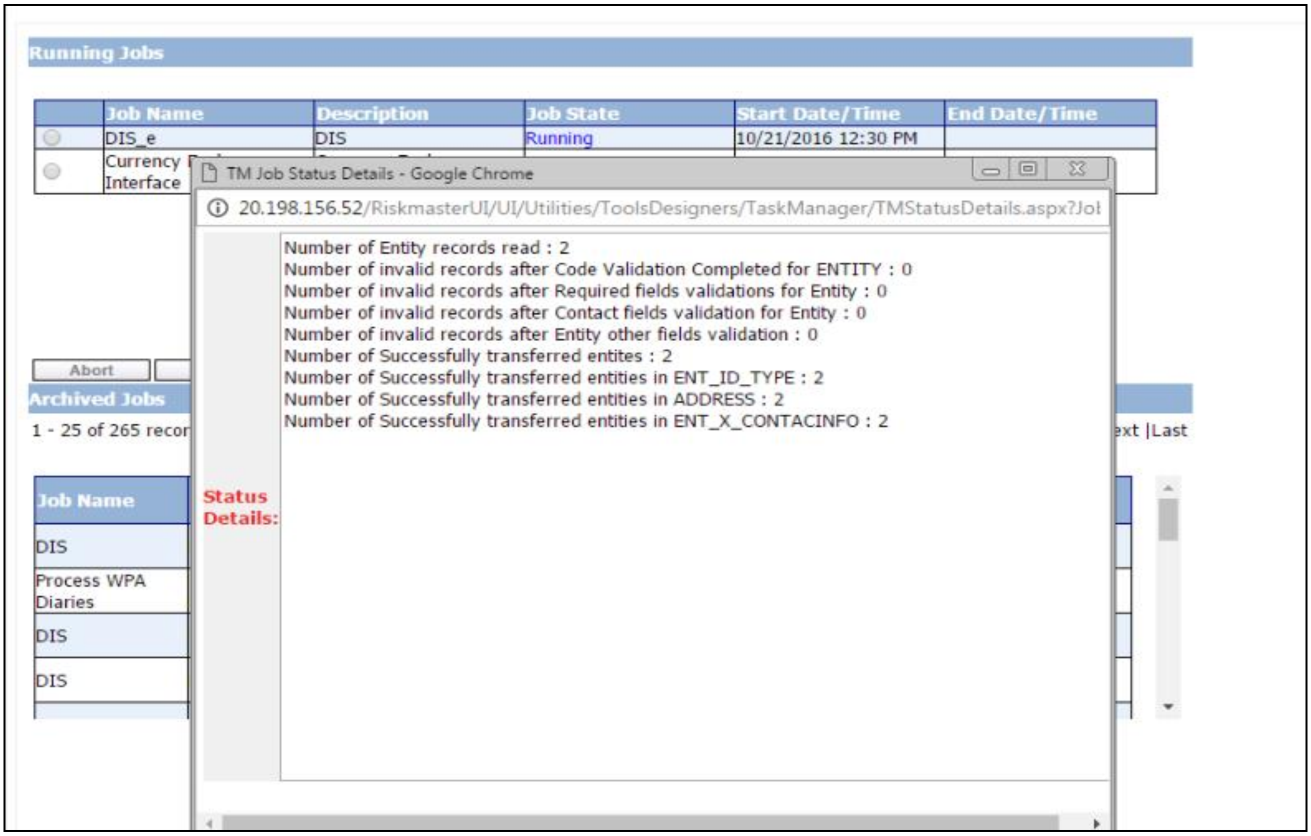
Once the DIS job is scheduled and the optionset is saved , to check the job state of the scheduled job please follow below mentioned steps.

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.





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



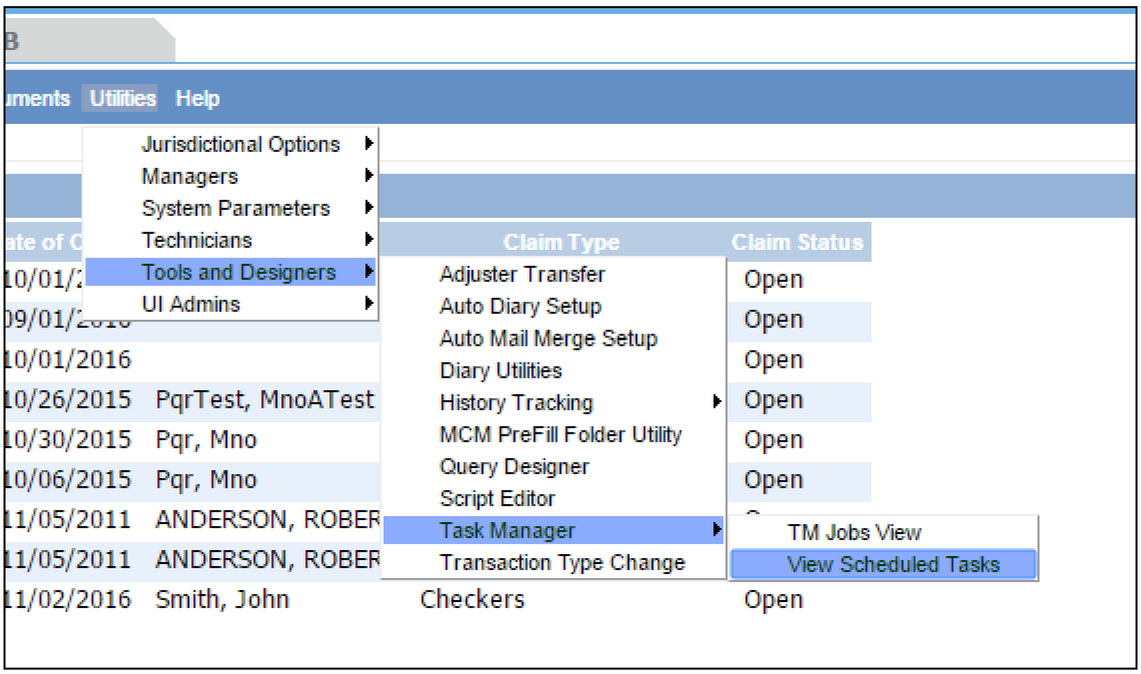
This process shows the complete status of data given in import file.

- 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

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.



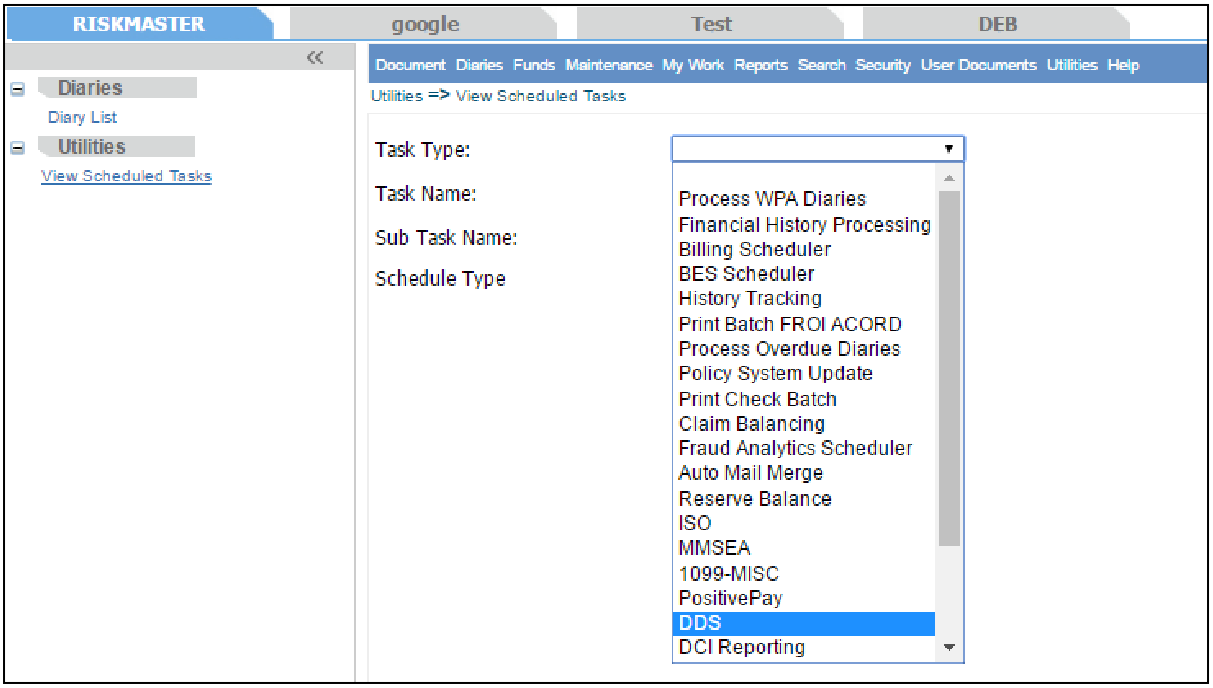
5. Select the Schedule a New Task button.
6. From the Task Type drop down list, select the type of task as DDS.
7. In the Task Name field, enter the name of the task.
8. From the Schedule Type drop down list, select the type of schedule as OneTime.
9. Complete the fields on the Schedule a Task: One Time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

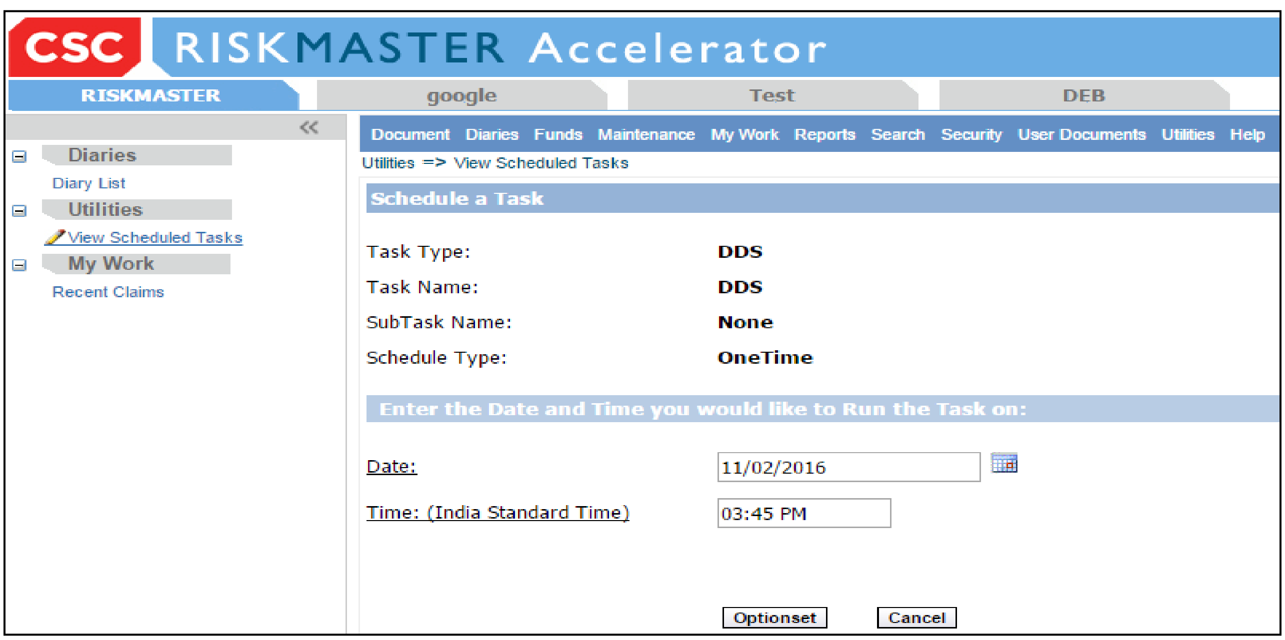
Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Optionset	Select the button to open the DDS Optionset window

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.

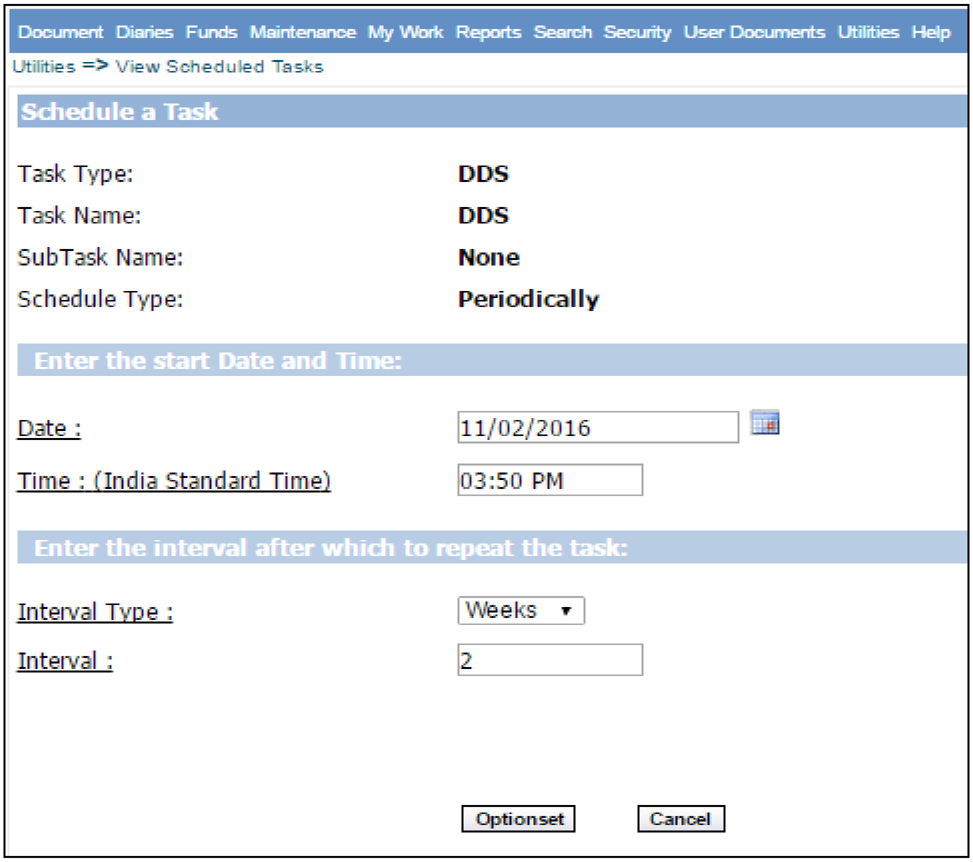
    The task is scheduled to run once.





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.



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:

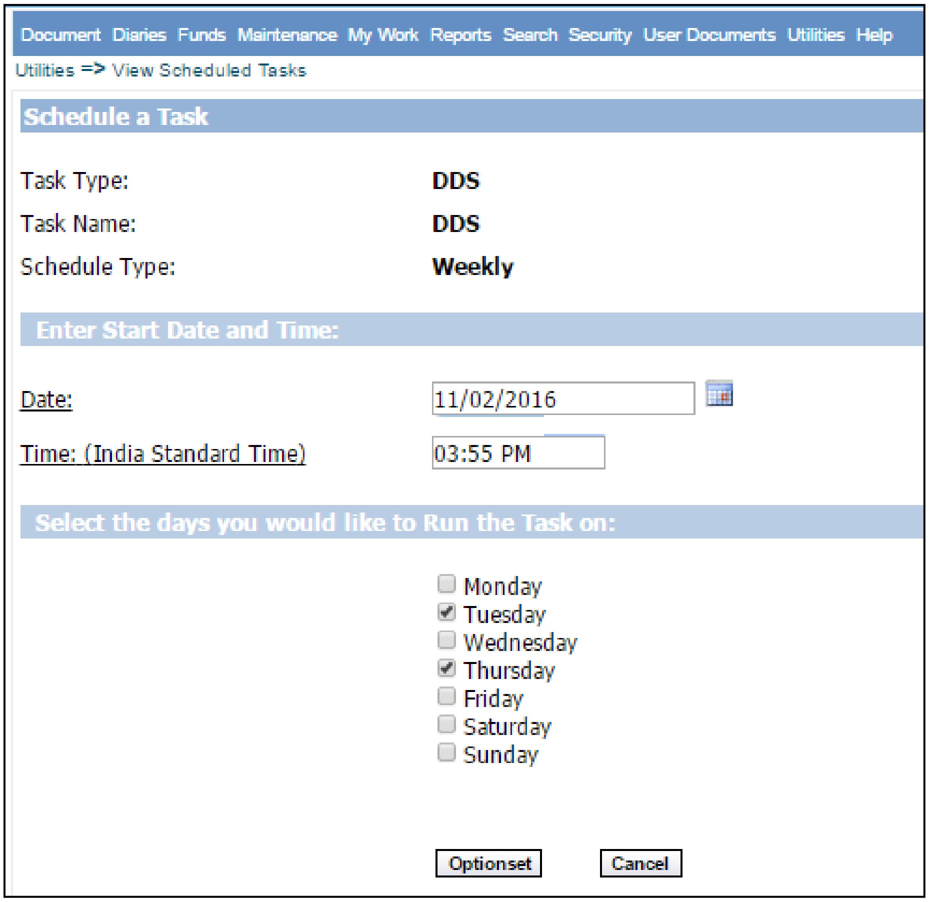
Interval Type	From the drop down list, select the type of interval after which you want to repeat the task.
Interval	Enter the interval after which you want to repeat the task.
Optionset	Select the button to open the DDS Optionset window.
Cancel	Select the button to close the window without saving the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



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:

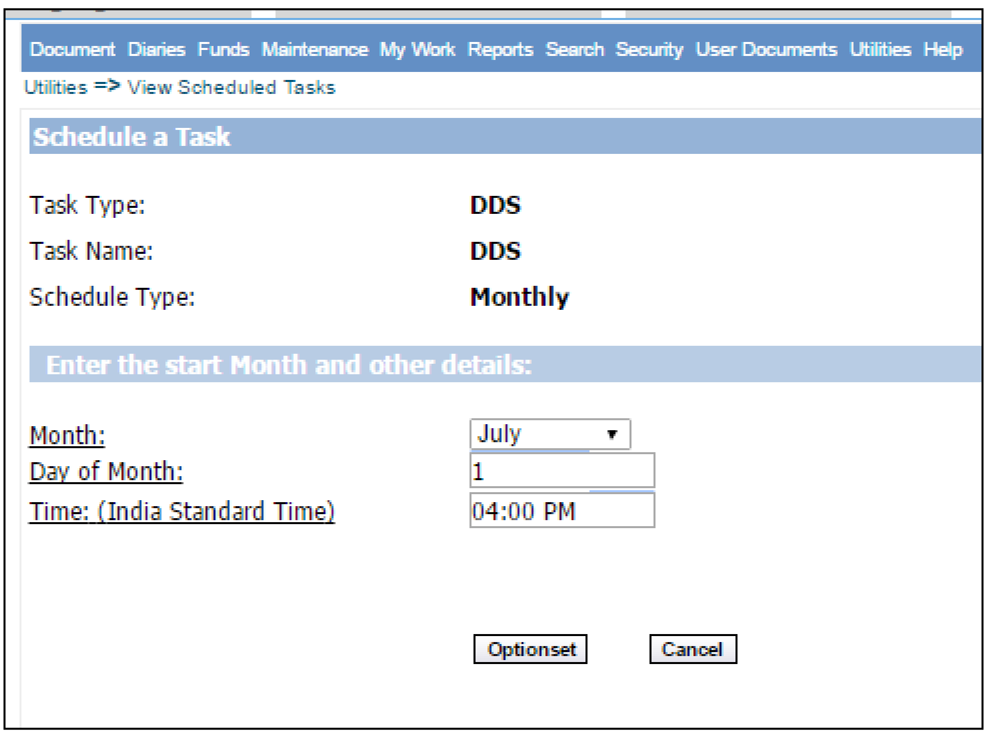
Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Select the days you would like to Run the Task on	Select the check box for a day of the week on which you want to run the scheduled task. **Note:** You can select more 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.
7. 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.
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.
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.

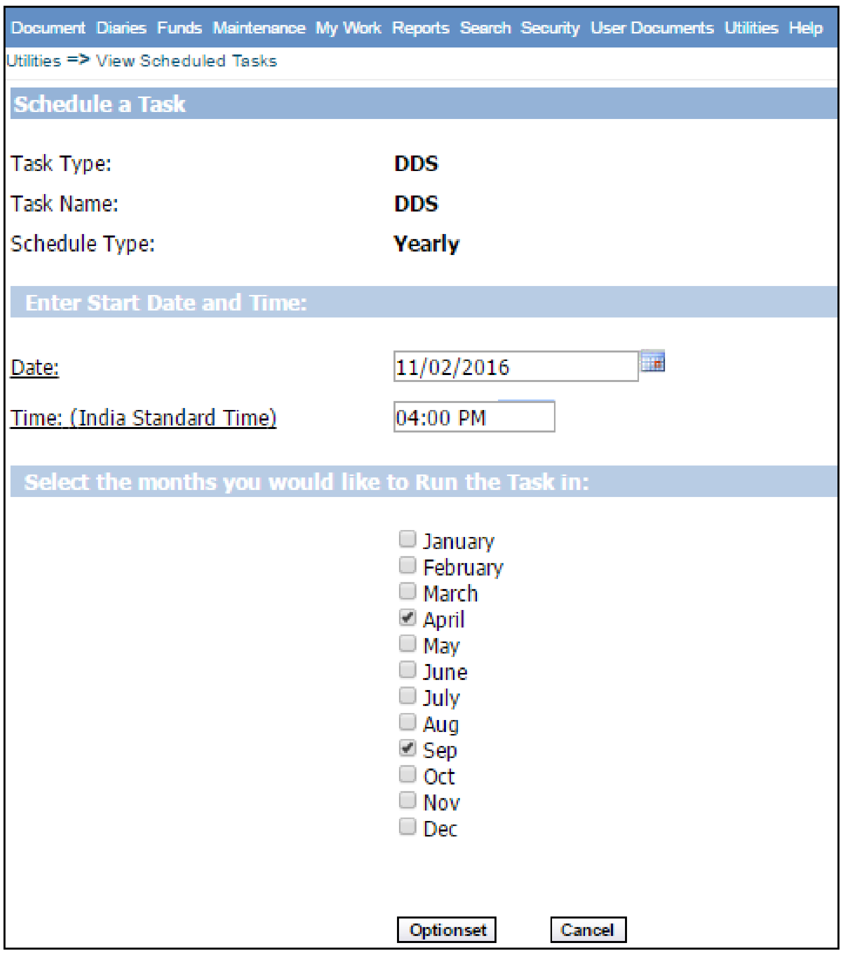
10. If necessary, use the DDS Optionset window to enter details about the task.
11. Select the Save button.

    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.



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 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 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.
2. Select the Save button.
   The task is scheduled to run yearly.

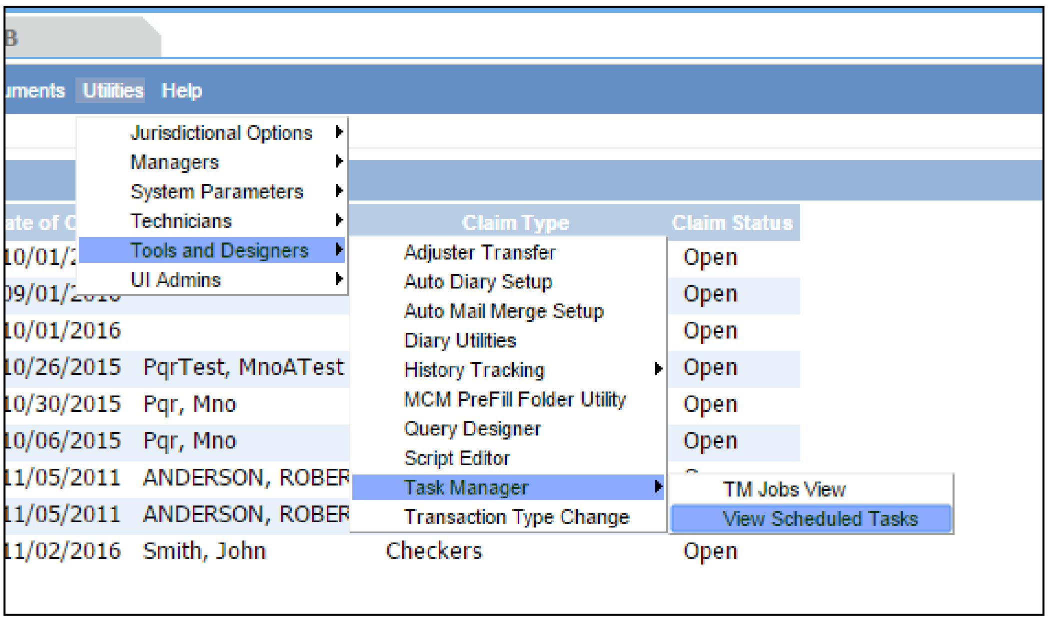
DDS Optionset window

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.



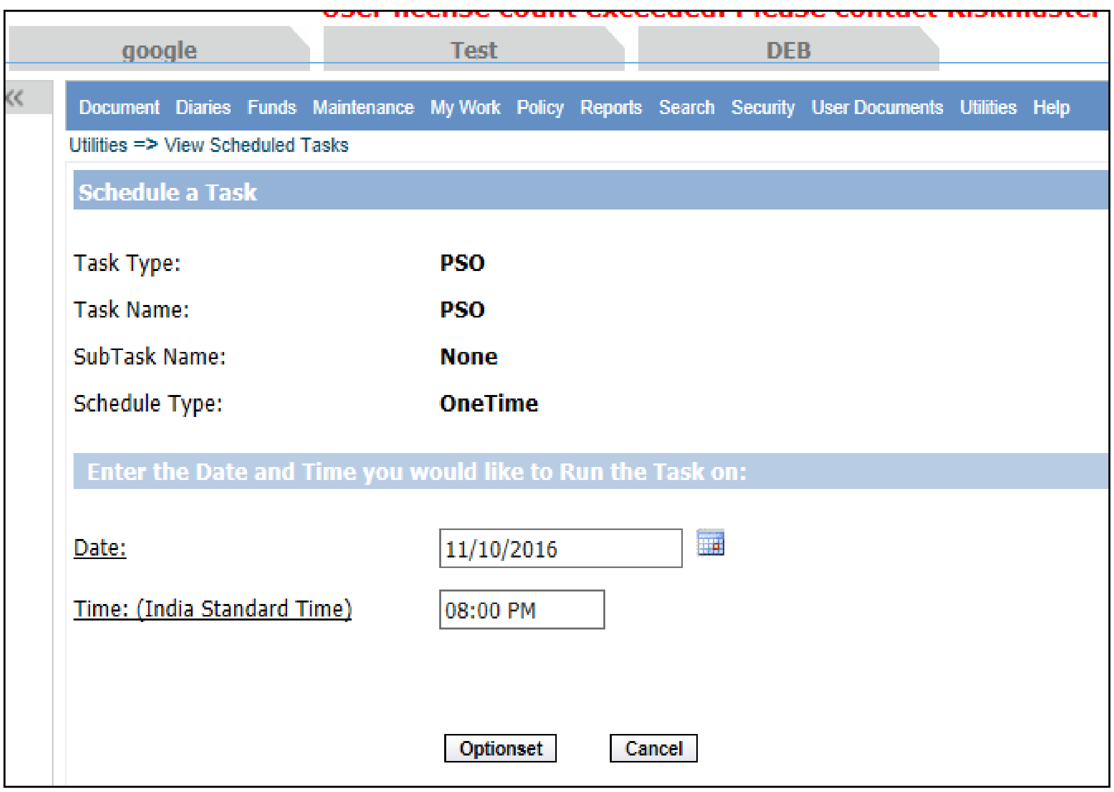
17. From the Task Type drop down list, select the type of task as PSO.
18. In the Task Name field, enter the name of the task.
19. From the Schedule Type drop down list, select the type of schedule as One Time.
20. Complete the fields on the Schedule a Task: One Time window as shown below:

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.

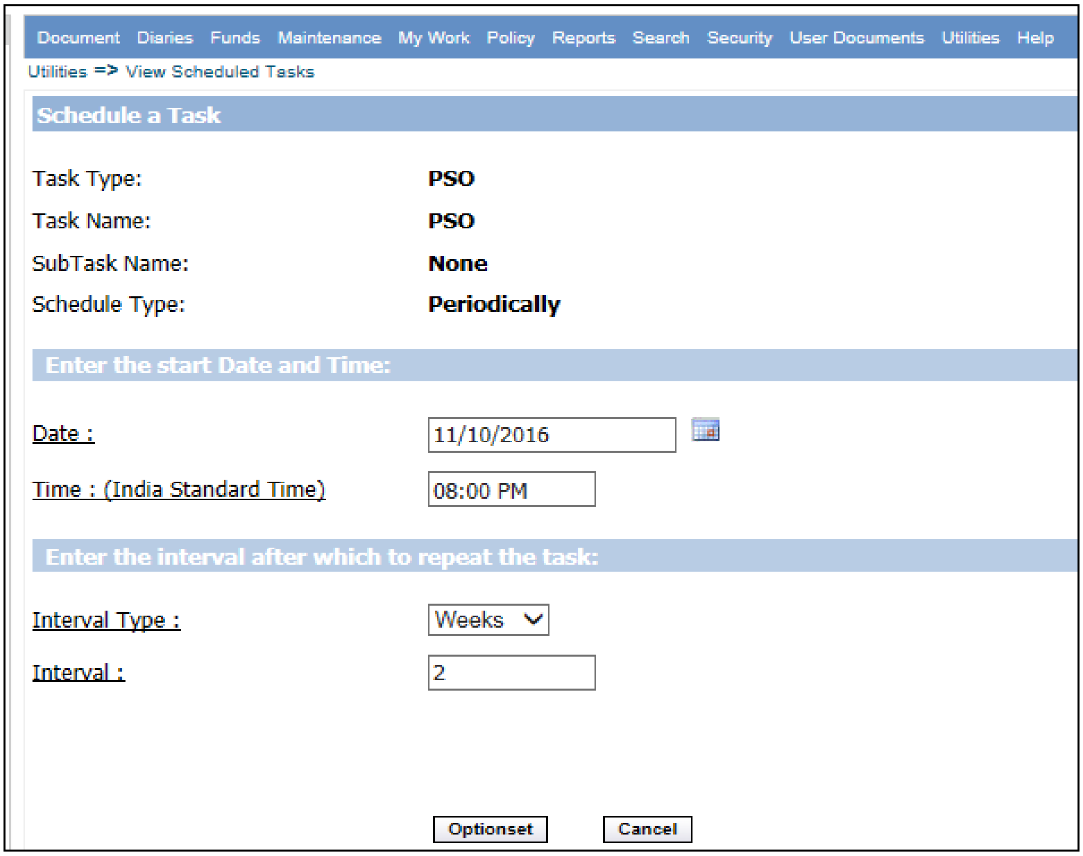
21. Select the Optionset button.
    The PSO Optionset window opens.
22. Complete the fields on the PSO Optionset window and select the Save Settings button.
    The task is scheduled to run one time.


CSC RISKMASTER Accelerator
User license count exceeded. Please contact Riskmaste
RISKMASTER
google
Test
DEB
Help
What's New
Utilities
View Scheduled Tasks
Document Diaries Funds Maintenance My Work Policy Reports Search Security User Documents Utilities Help
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
Reserve Balance
ISO
MMSEA
1099-MISC
PositivePay
DDS
DCI Reporting
Print Batch EOB
DIS
MBR
Currency Exchange Interface
PSO


google
Test
DEB
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: OneTime
Enter the Date and Time you would like to Run the Task on:
Date: 11/10/2016
Time: (India Standard Time) 08:00 PM
Optionset
Cancel

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.



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 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.

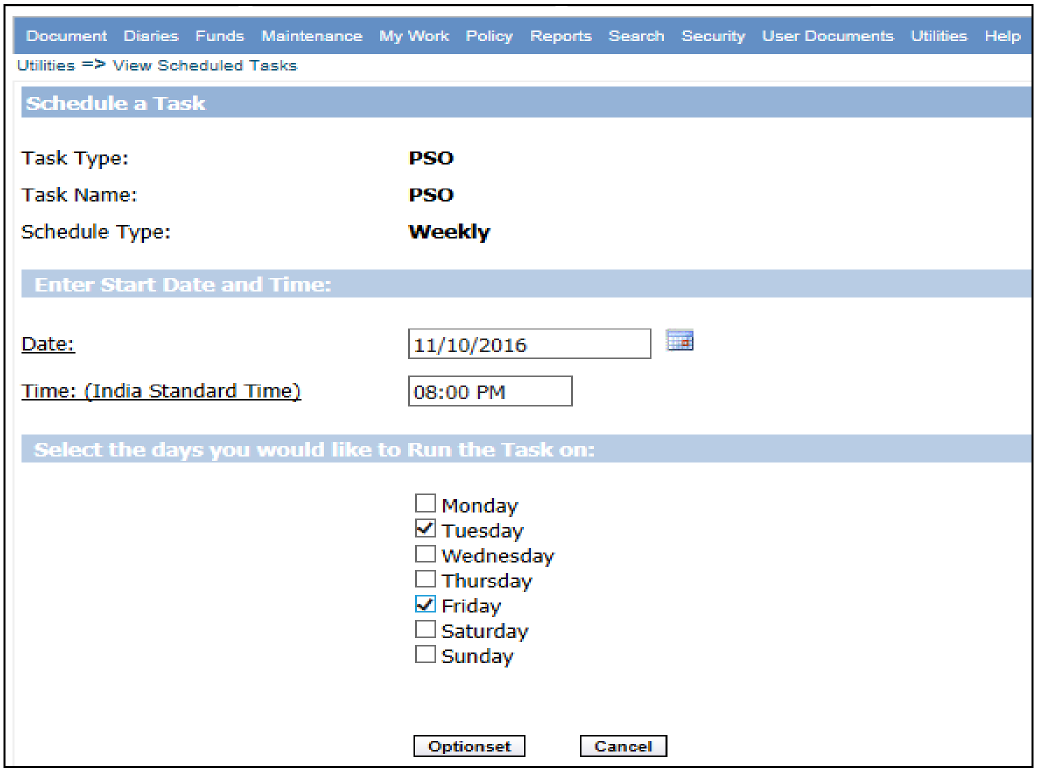
13. Select the Optionset button.

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.



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 Run the Task on	Select the check box for a day of the week on which you want to run the scheduled task. **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.

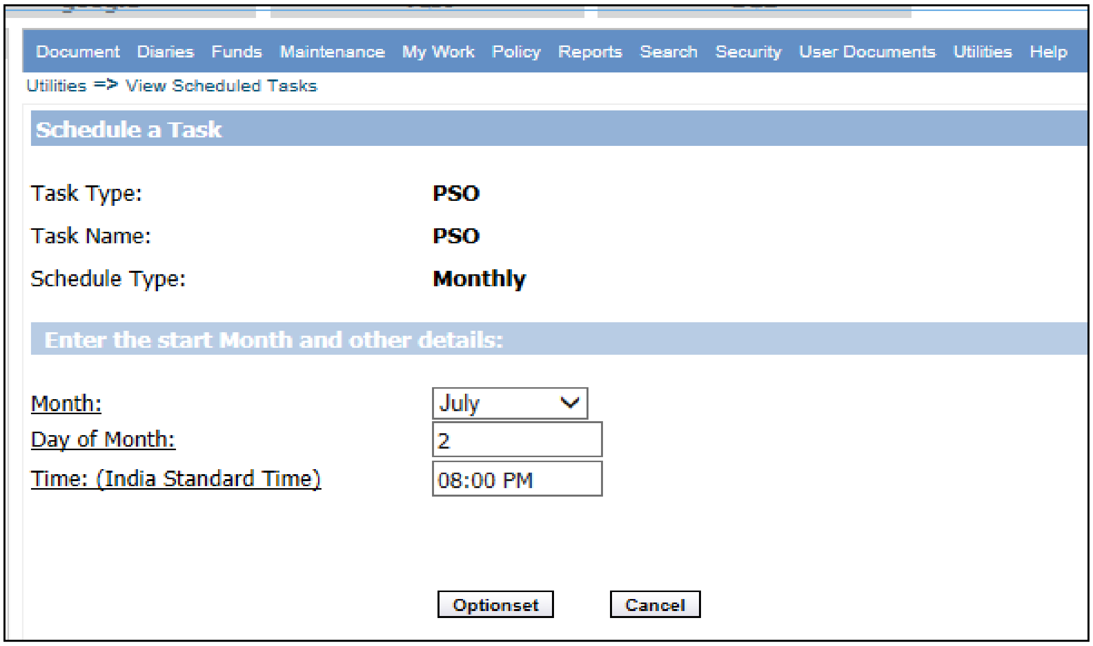
The PSO Optionset window opens.

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.



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.

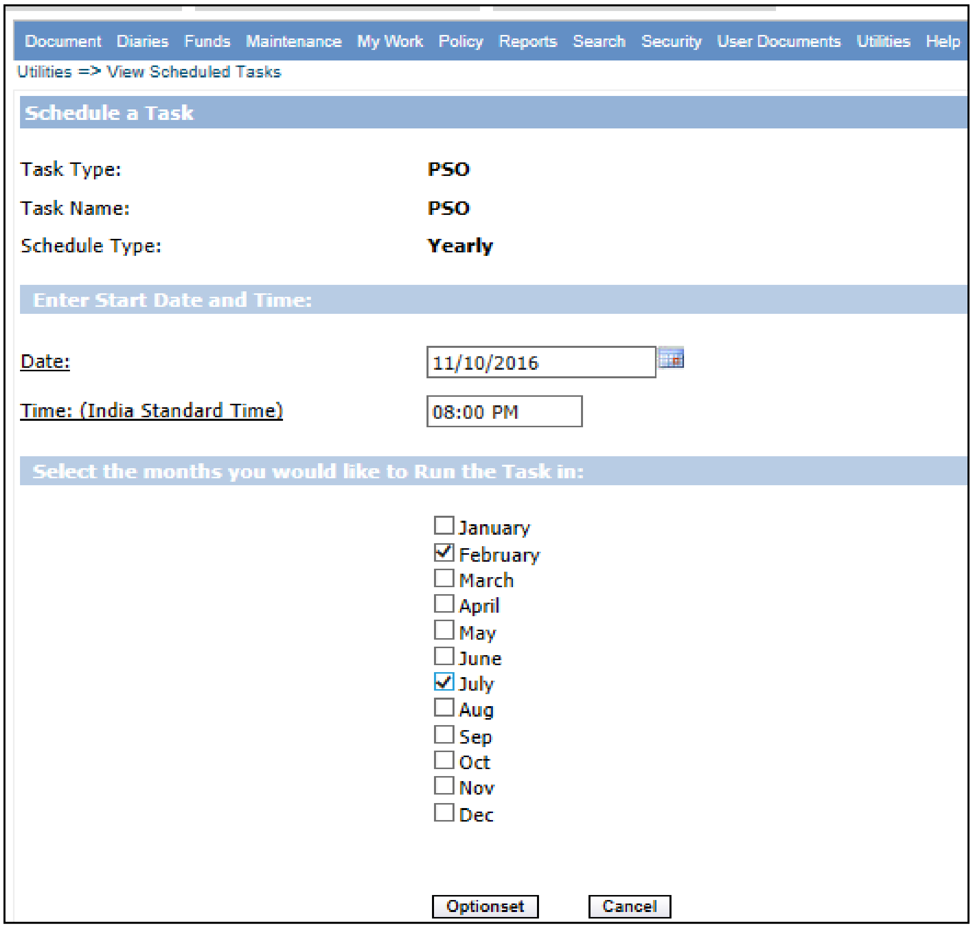
    The PSO Optionset window opens.

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.



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.

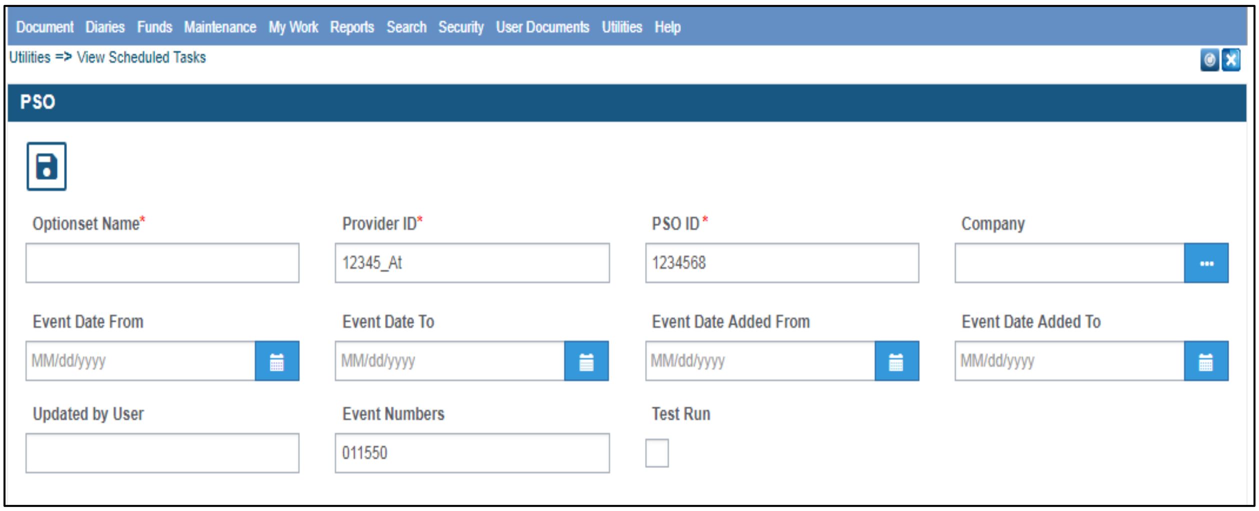
The PSO Optionset window opens.

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



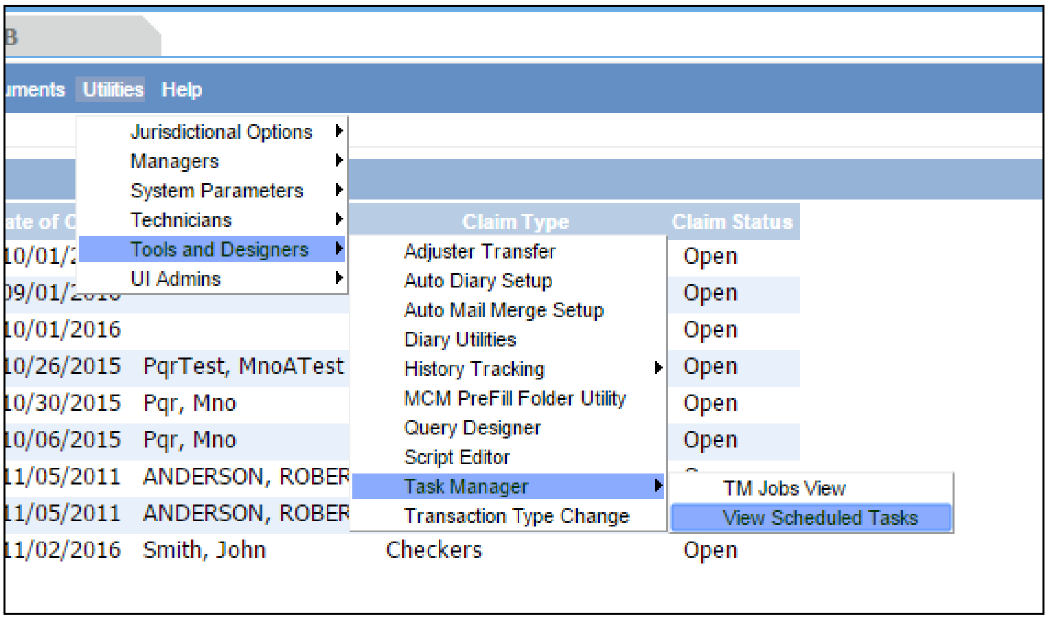
PSO Export Settings Tab

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	Select to Save the changes.
Cancel	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.
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.



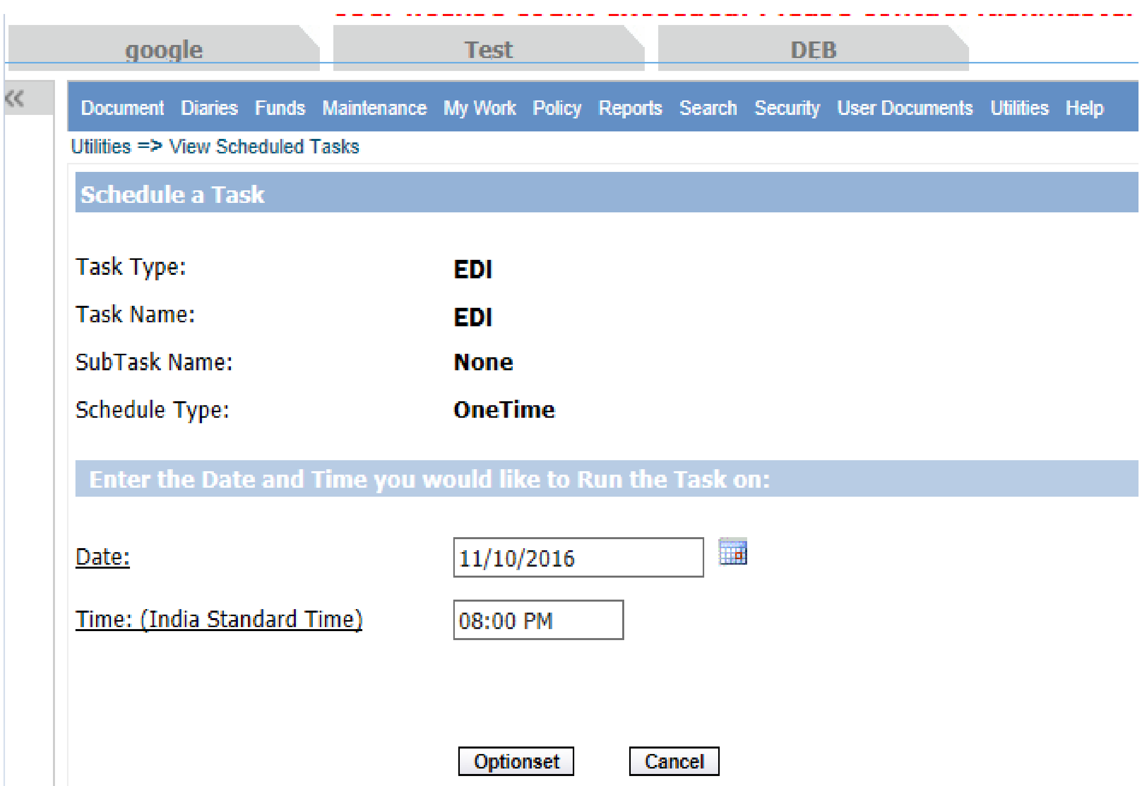
6. From the Task Type drop down list, select the type of task as EDI.
7. In the Task Name field, enter the name of the task.
8. From the Schedule Type drop down list, select the type of schedule as One Time.
9. Complete the fields on the Schedule a Task: One Time window as shown below:

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.

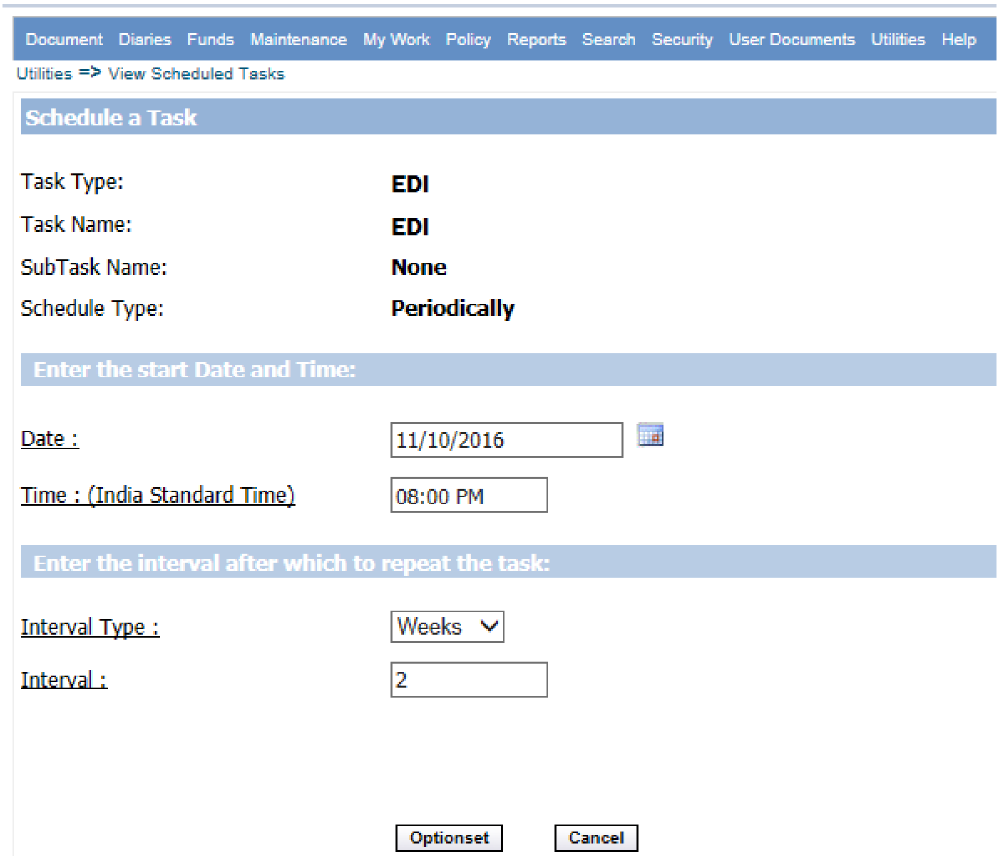
10. Select the Optionset button.
    The EDI Optionset window opens.
11. Complete the fields on the EDI Optionset window and select the Save Settings button.
    The task is scheduled to run one time.


CSC RISKMASTER Accelerator
User license count exceeded. Please contact Riskmaste
RISKMASTER
google
Test
DEB
Help
What's New
Utilities
View Scheduled Tasks
Document Diaries Funds Maintenance My Work Policy Reports Search Security User Documents Utilities Help
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
Reserve Balance
ISO
MMSEA
1099-MISC
PositivePay
DDS
DCI Reporting
Print Batch EOB
DIS
MBR
Currency Exchange Interface
EDI


google
Test
DEB
Document Diaries Funds Maintenance My Work Policy Reports Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks
Schedule a Task
Task Type: EDI
Task Name: EDI
SubTask Name: None
Schedule Type: OneTime
Enter the Date and Time you would like to Run the Task on:
Date: 11/10/2016
Time: (India Standard Time) 08:00 PM
Optionset
Cancel

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.



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 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.

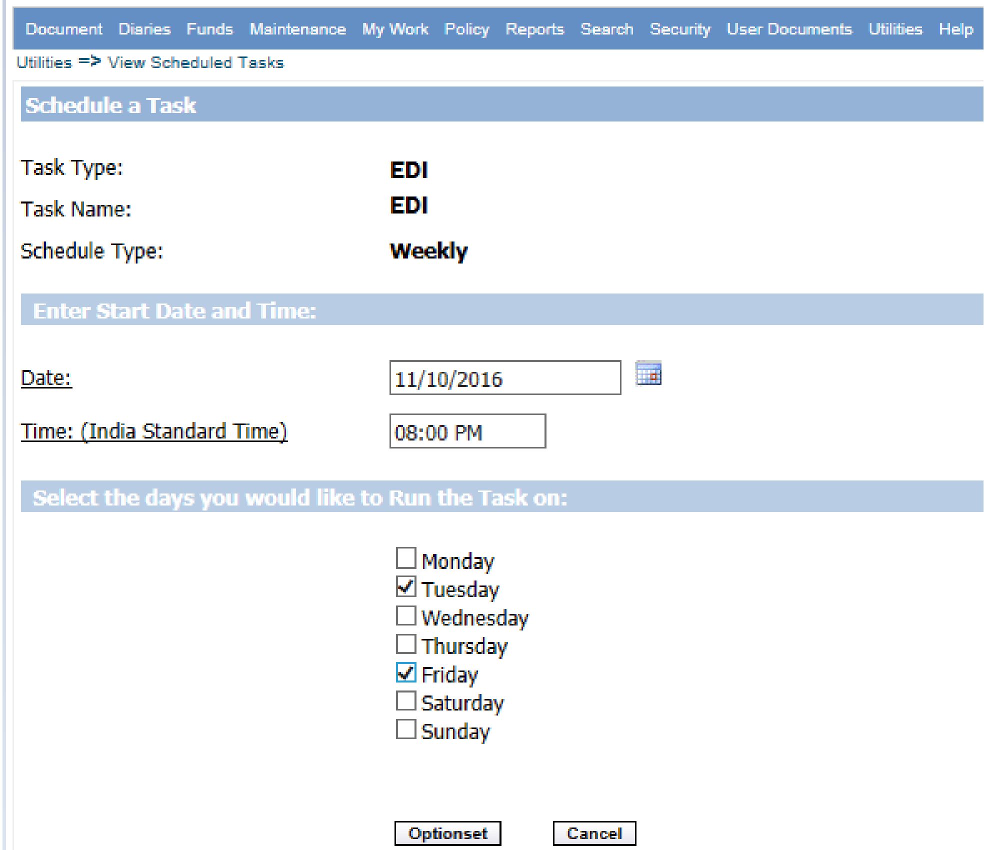
   The EDI Optionset window opens.

7. 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.



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:

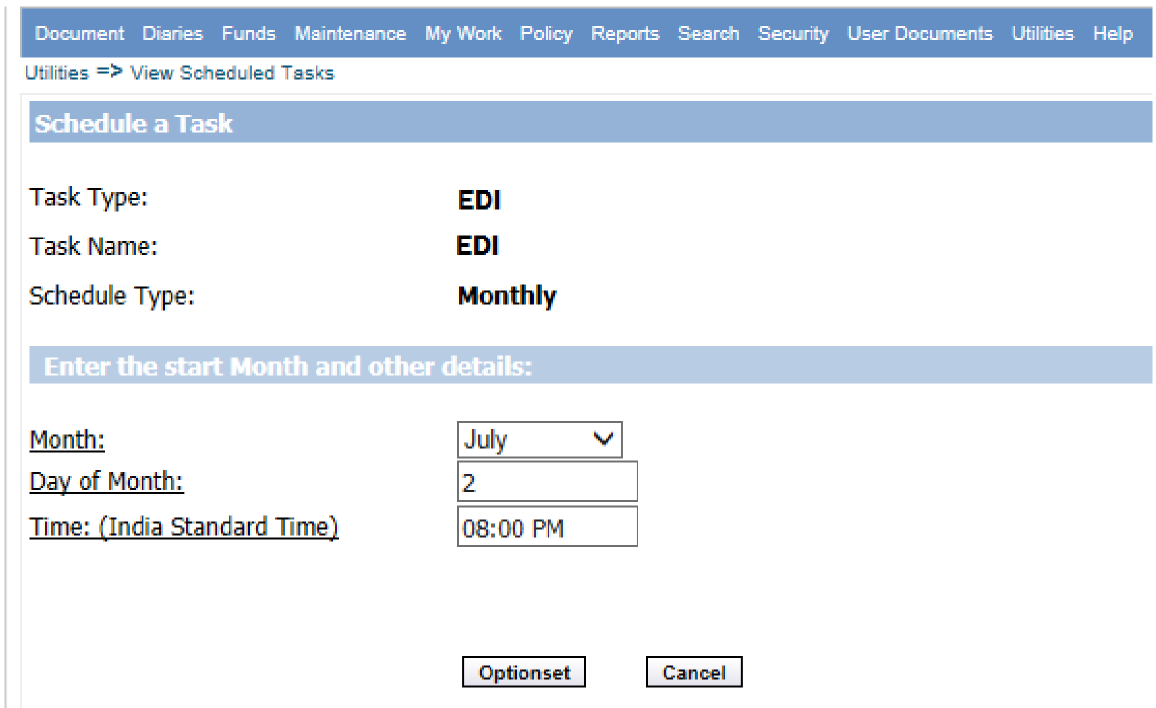
Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Select the days you would like to Run the Task on	Select the check box for a day of the week on which you want to run the scheduled task. **Note:** You can select more 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.
7. 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.



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.

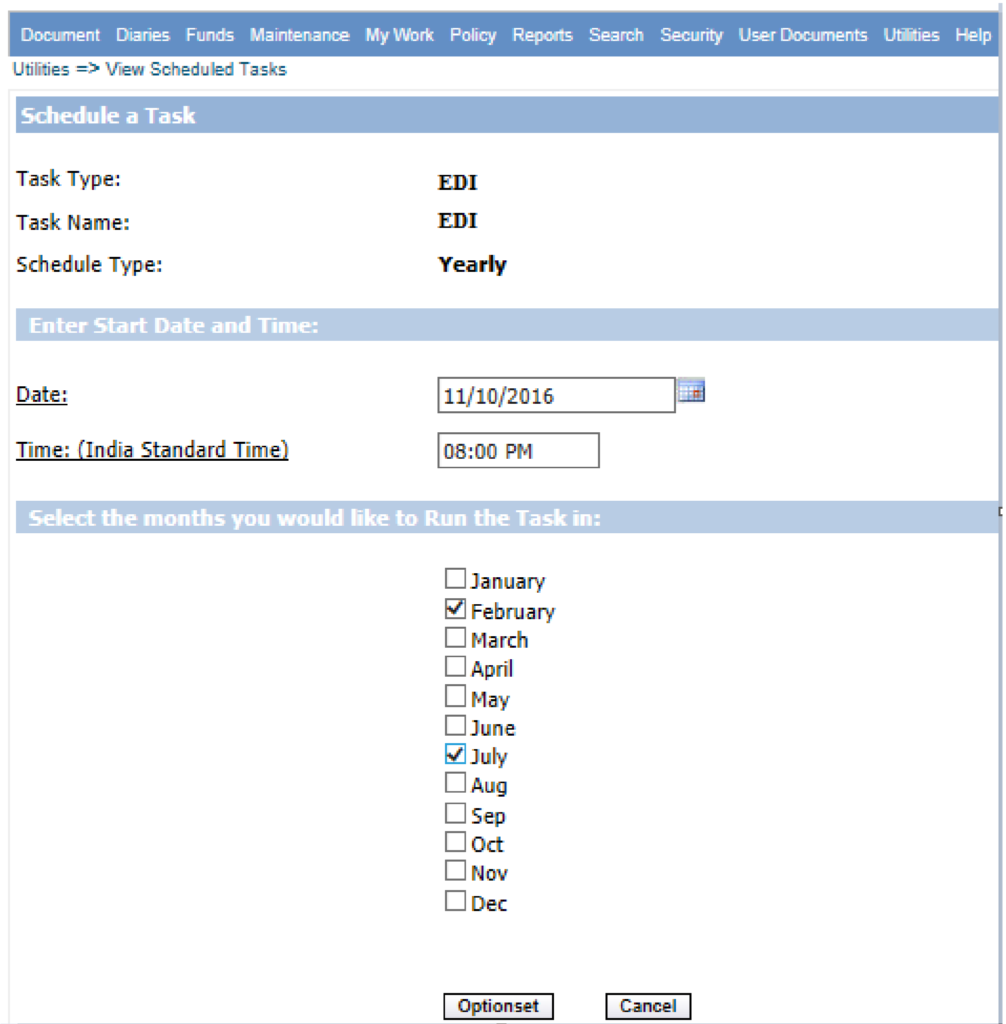
7. Complete the fields on the EDI Optionset window and select the Save Settings button.

   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.



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.

6. 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

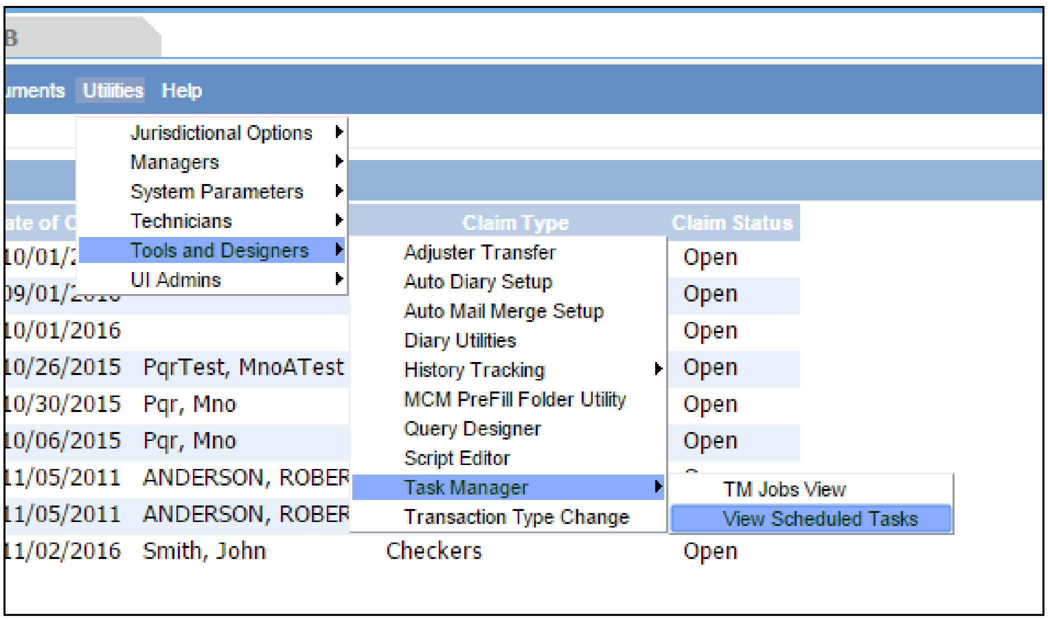
For details regarding the EDI / Florida MED-EDI option window please refer the **EDI / Florida-Med EDI User Guide**

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.
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.

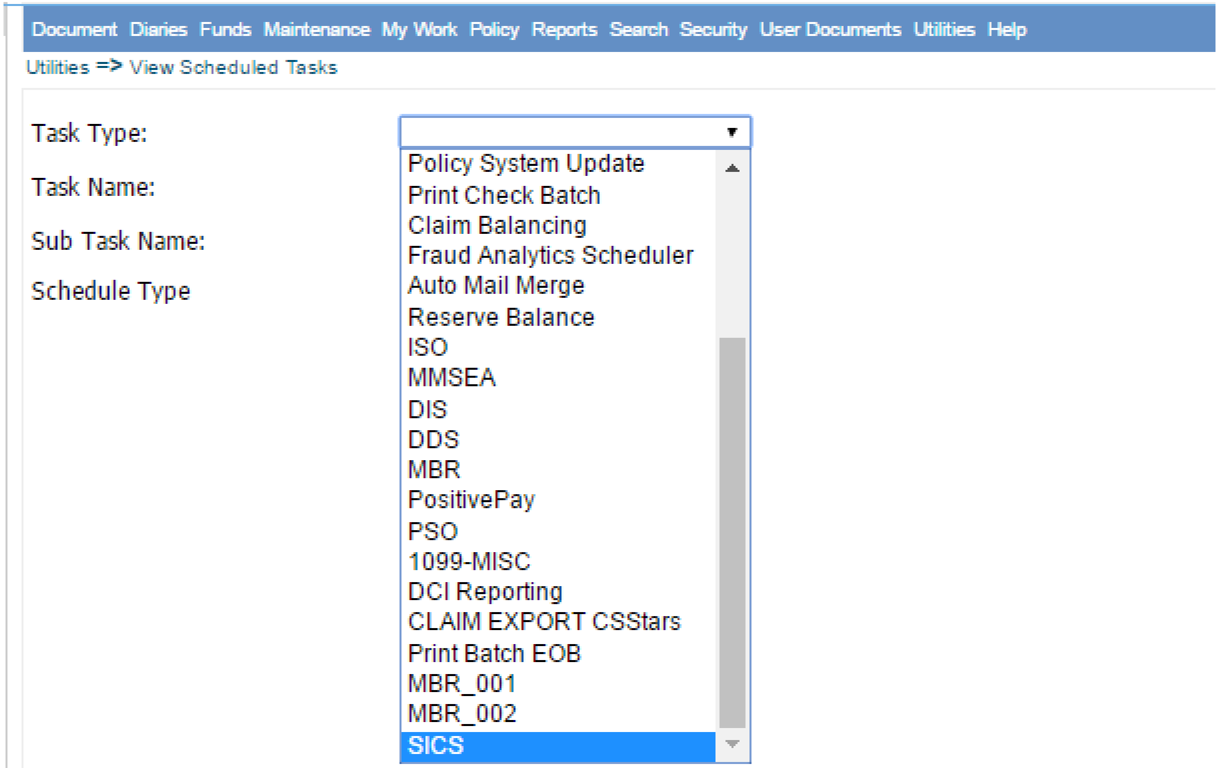


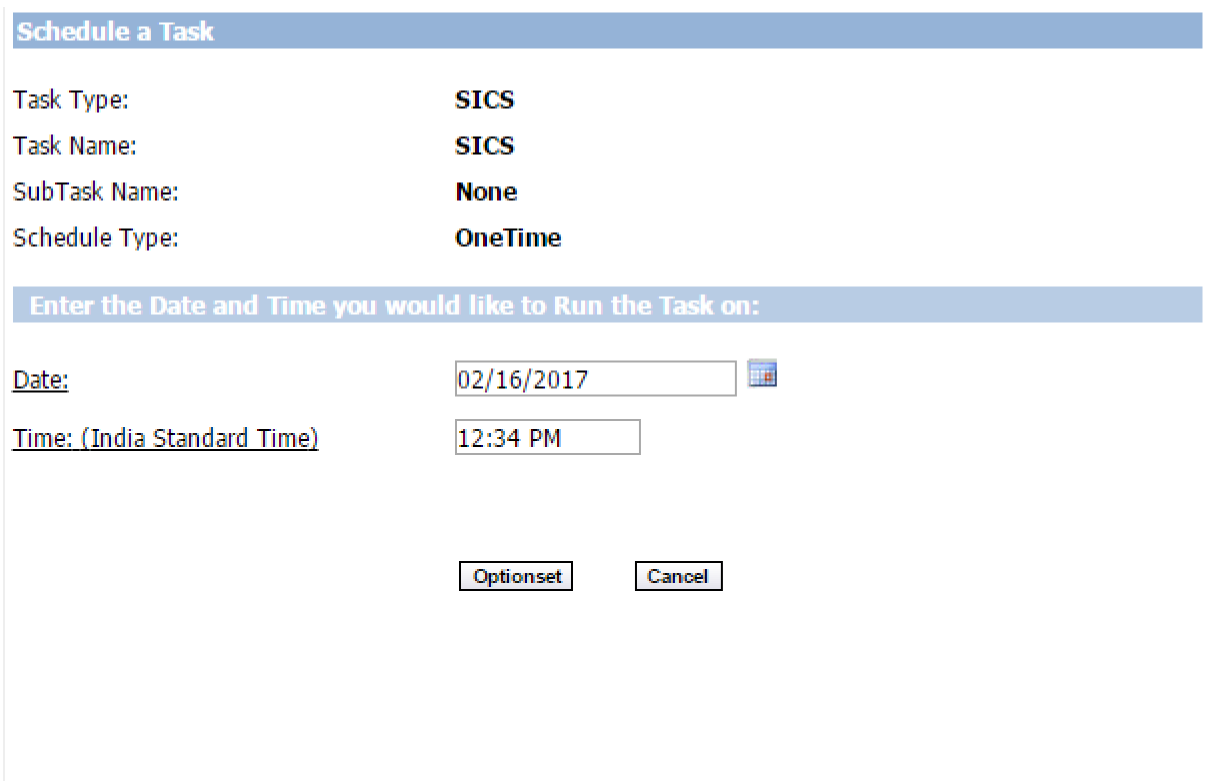
6. From the Task Type drop down list, select the type of task as SICS.
7. In the Task Name field, enter the name of the task.
8. From the Schedule Type drop down list, select the type of schedule as One Time.
9. Complete the fields on the Schedule a Task: One Time window as shown below:

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.

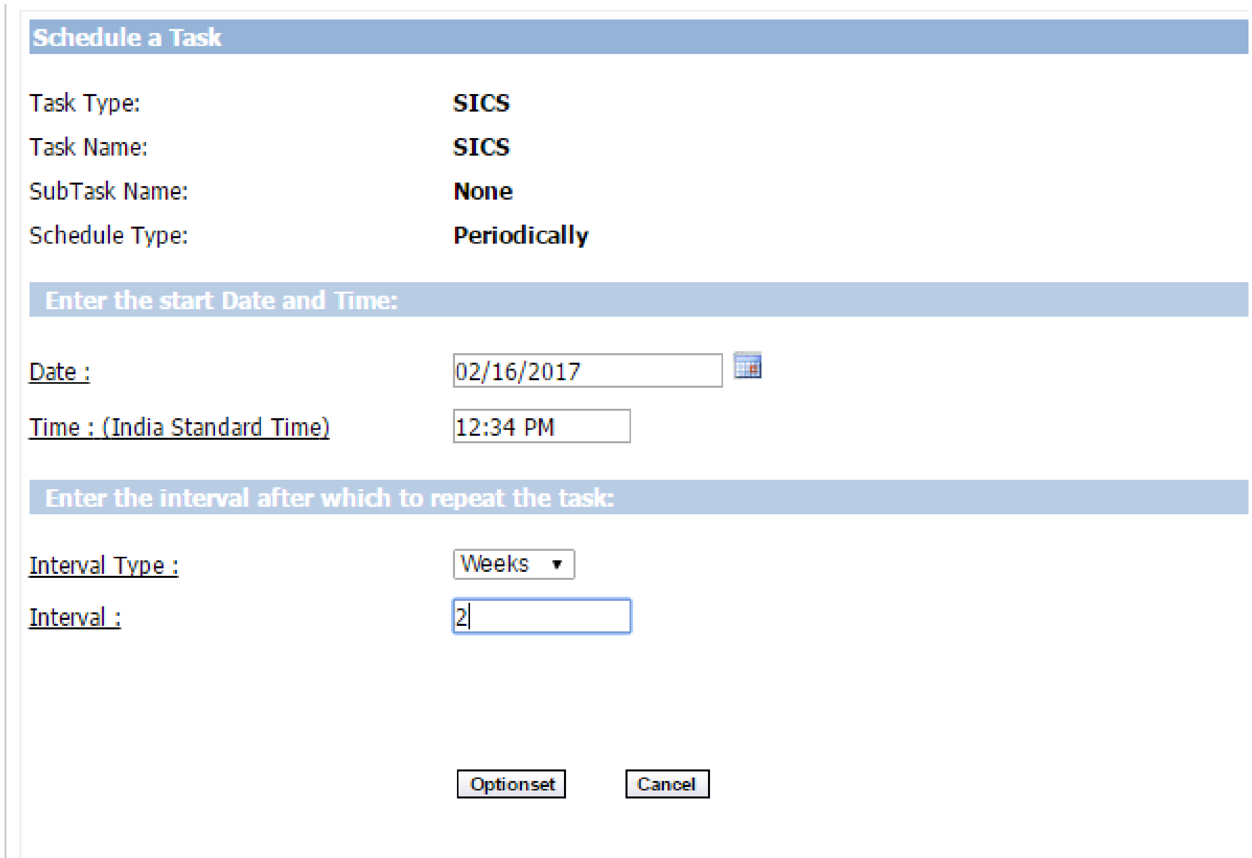
10. Select the Optionset button.
    The SICS Optionset window opens.
11. Complete the fields on the SICS Optionset window and select the Save Settings button.
    The task is scheduled to run one time.


Document Diaries Funds Maintenance My Work Policy Reports Search Security User Documents Utilities Help
Utilities => View Scheduled Tasks
Task Type:
Task Name:
Sub Task Name:
Schedule Type
Policy System Update
Print Check Batch
Claim Balancing
Fraud Analytics Scheduler
Auto Mail Merge
Reserve Balance
ISO
MMSEA
DIS
DDS
MBR
PositivePay
PSO
1099-MISC
DCI Reporting
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 would like to Run the Task on:
Date: 02/16/2017
Time: (India Standard Time) 12:34 PM
Optionset
Cancel

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.



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.

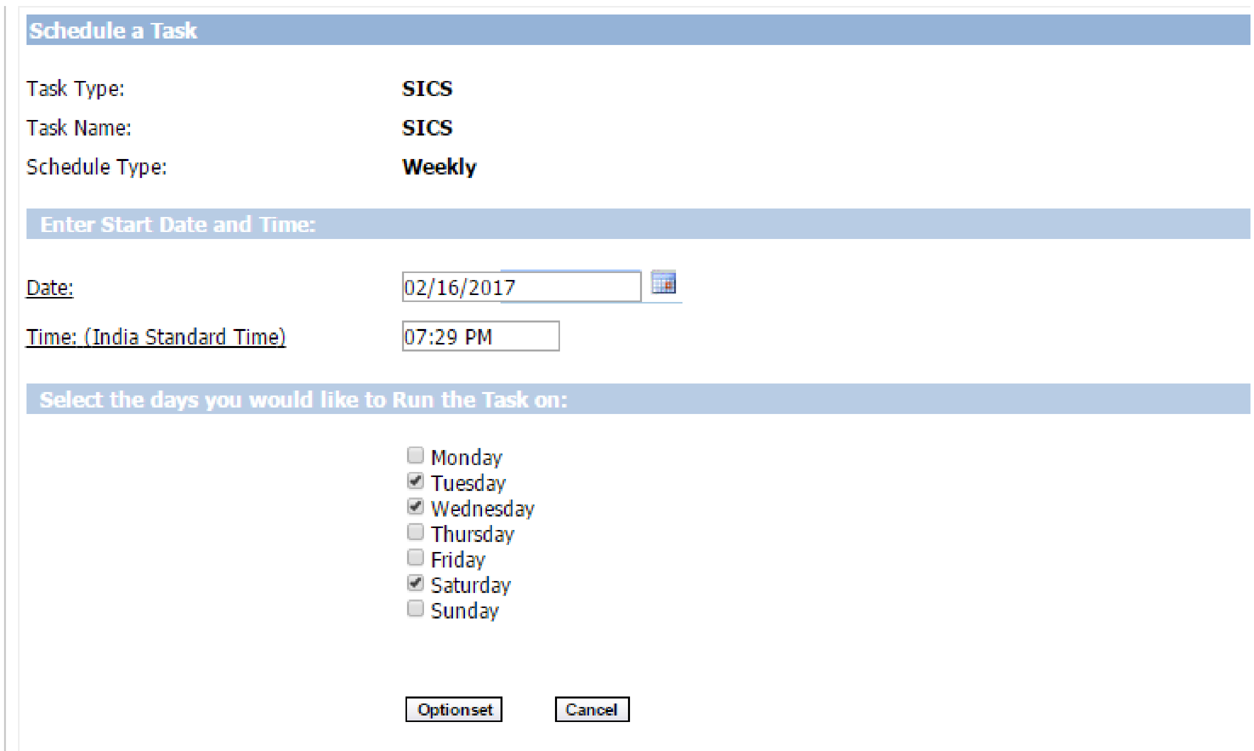
   The SICS Optionset window opens.

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.



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. **Note:** You can select more than one day to run 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.

13. Select the Optionset button.

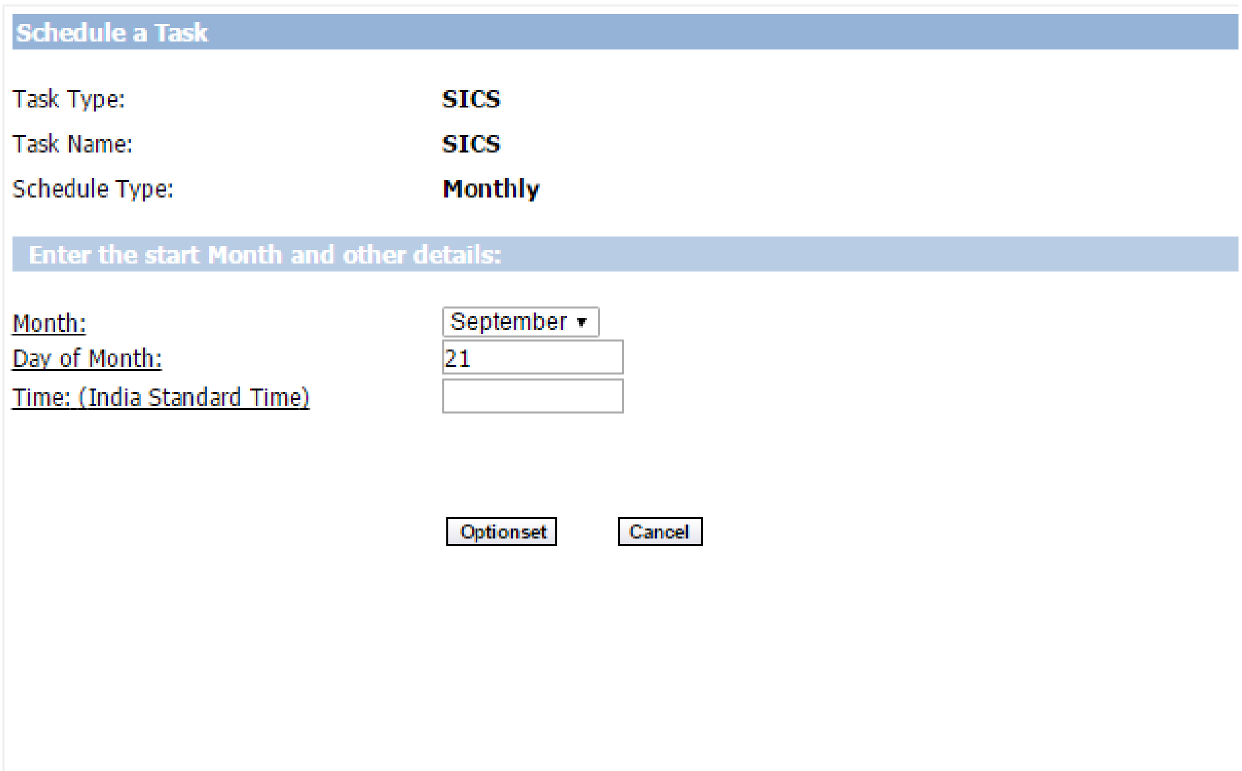
The SICS Optionset window opens.

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.



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.

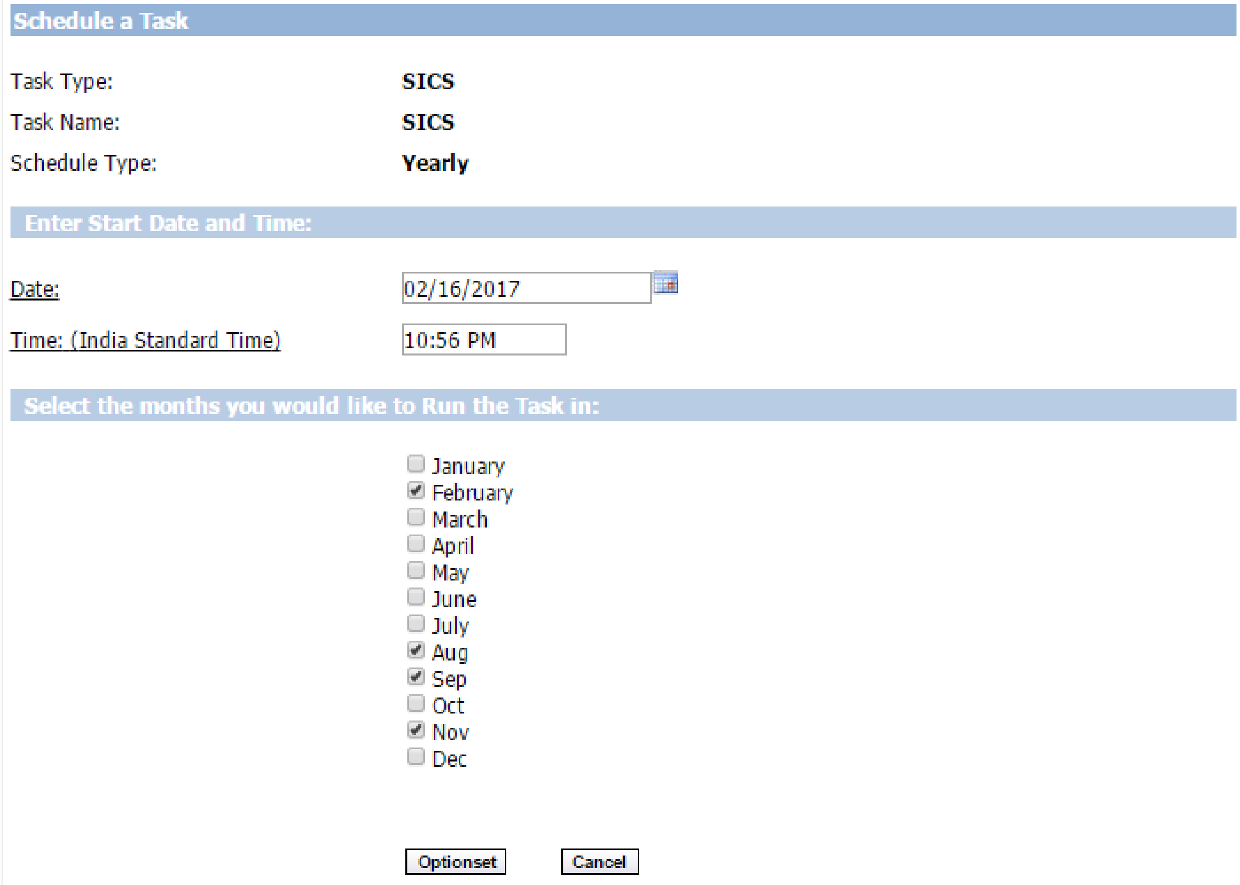
    The SICS Optionset window opens.

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.



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:

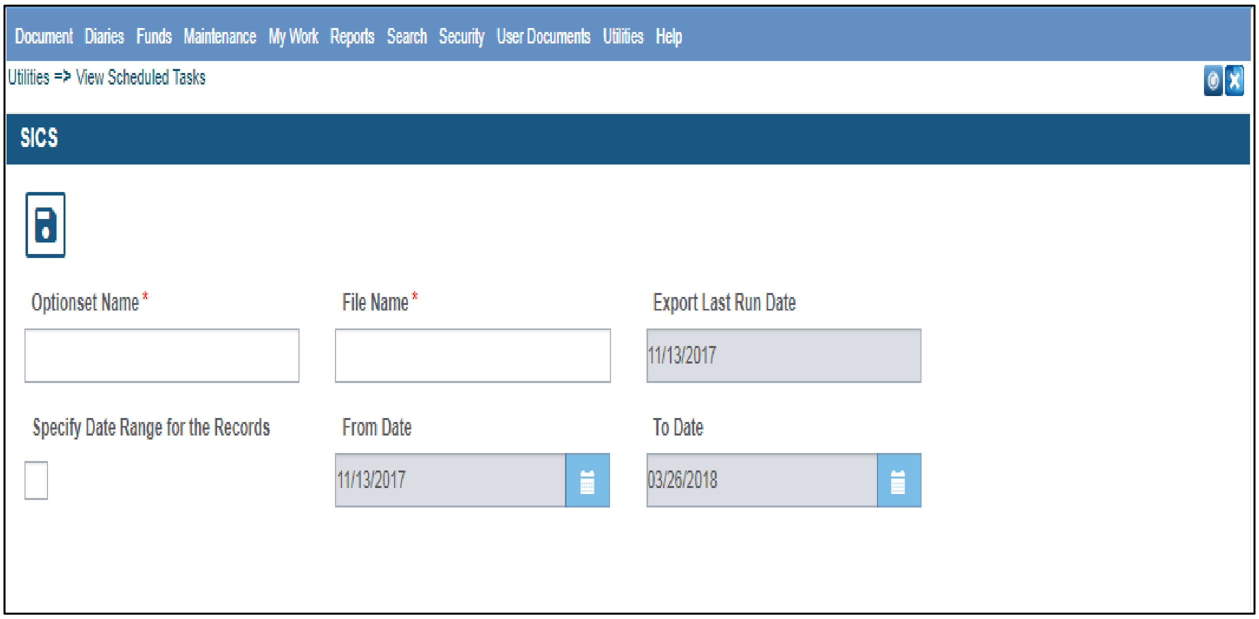
Enter Start Date and Time:

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 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 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 yearly.

SICS Optionset window

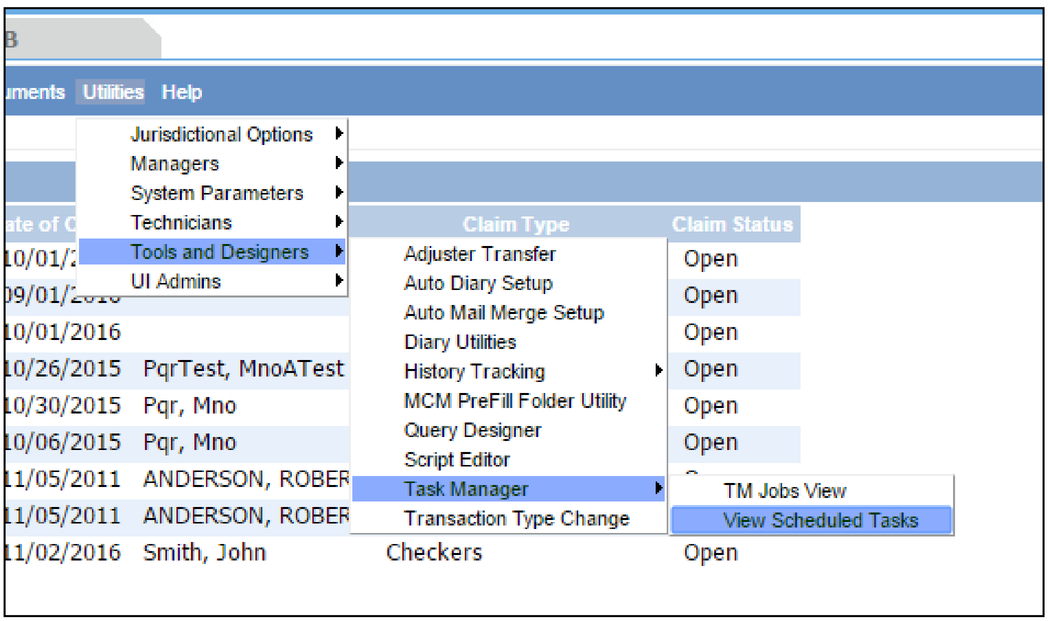


Optionset Name	Enter the name of the option set. The Option Name is required.
Target File Name	Enter the name of the extract file expected. The Target File Name is required.
Export Last Run Date	This displays the date when the Export is last time run.
Specify Date Range	Check this check box if need to 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

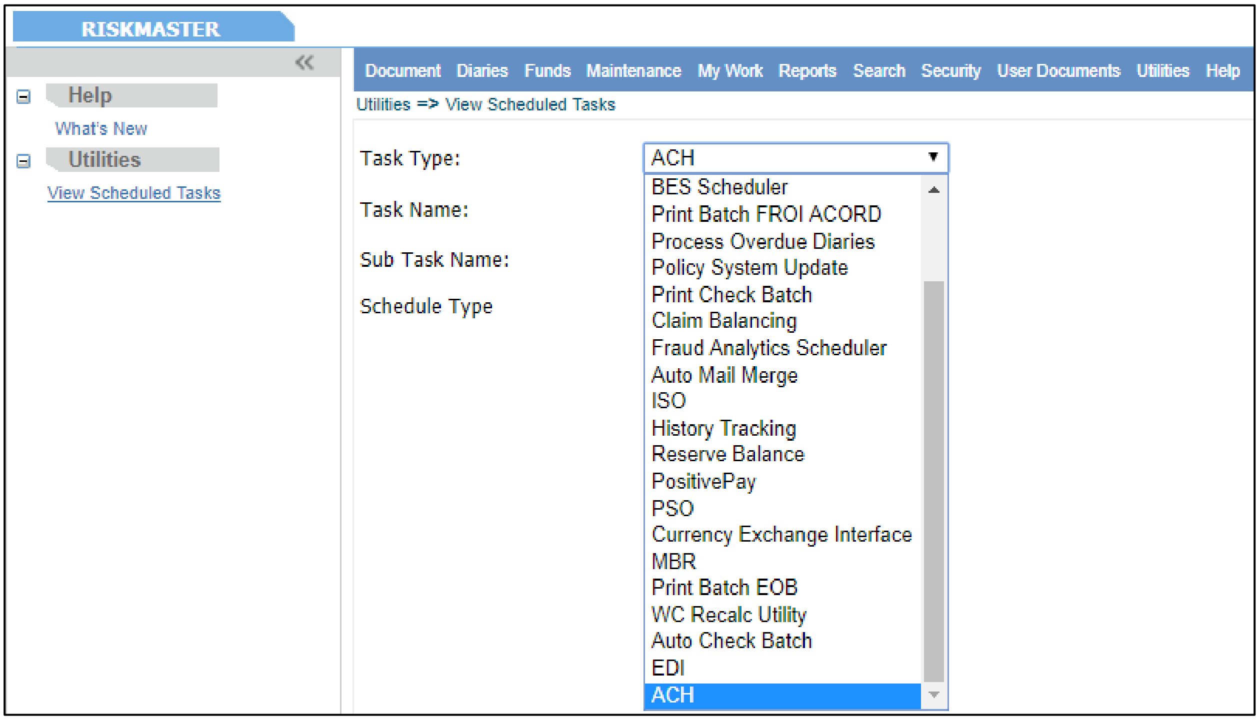
1. From the main menu, select Utilities.
   The Utilities menu opens.
2. From the Utilities menu, choose Tools & Designers.
   The Tools & Designers menu opens.
3. From the Tools & Designers menu, choose Task Manager.
   The Task Manager menu opens.
4. From the Task Manager menu, choose View Scheduled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

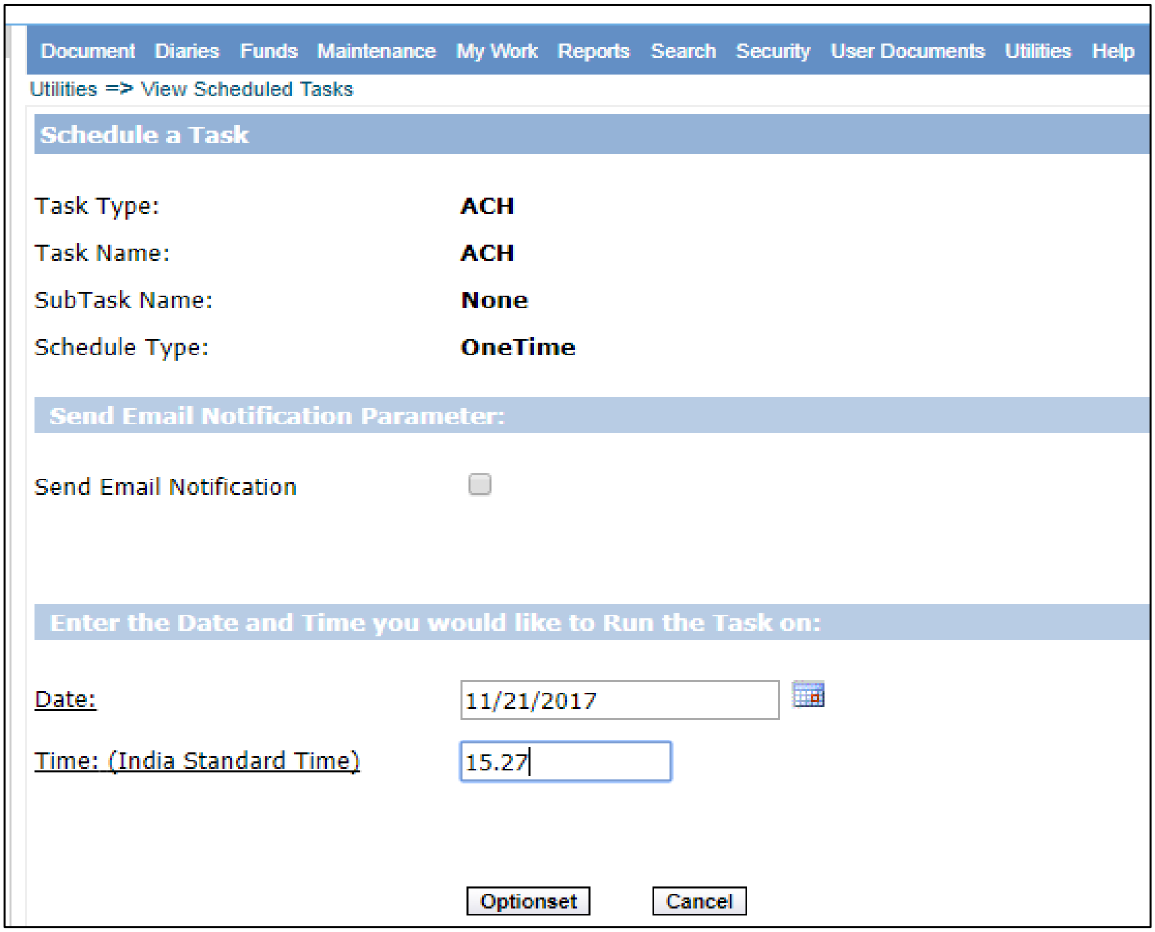


6. From the Task Type drop down list, select the type of task as ACH.
7. In the Task Name field, enter the name of the task.
8. From the Schedule Type drop down list, select the type of schedule as OneTime.
9. Complete the fields on the Schedule a Task: One Time as shown below:

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.

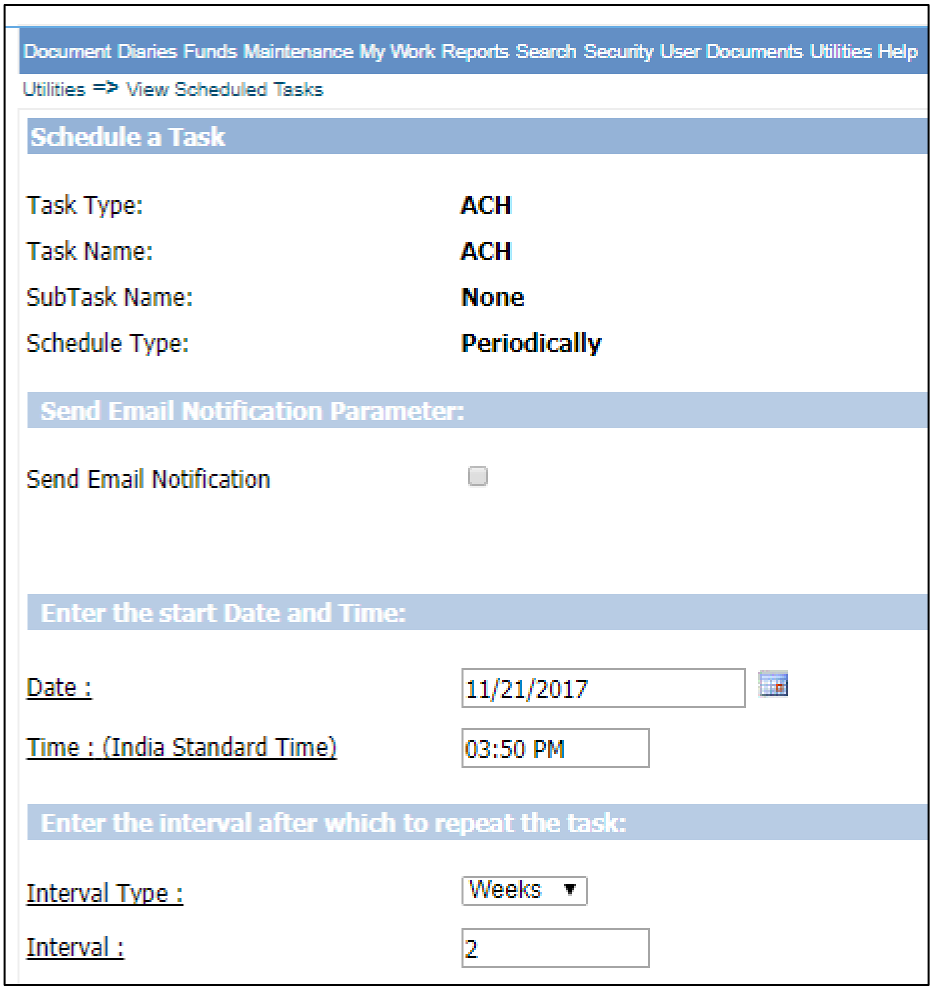




To Schedule Automatic Clearing House (ACH) Task: Periodically

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

The View Scheduled Task window opens.



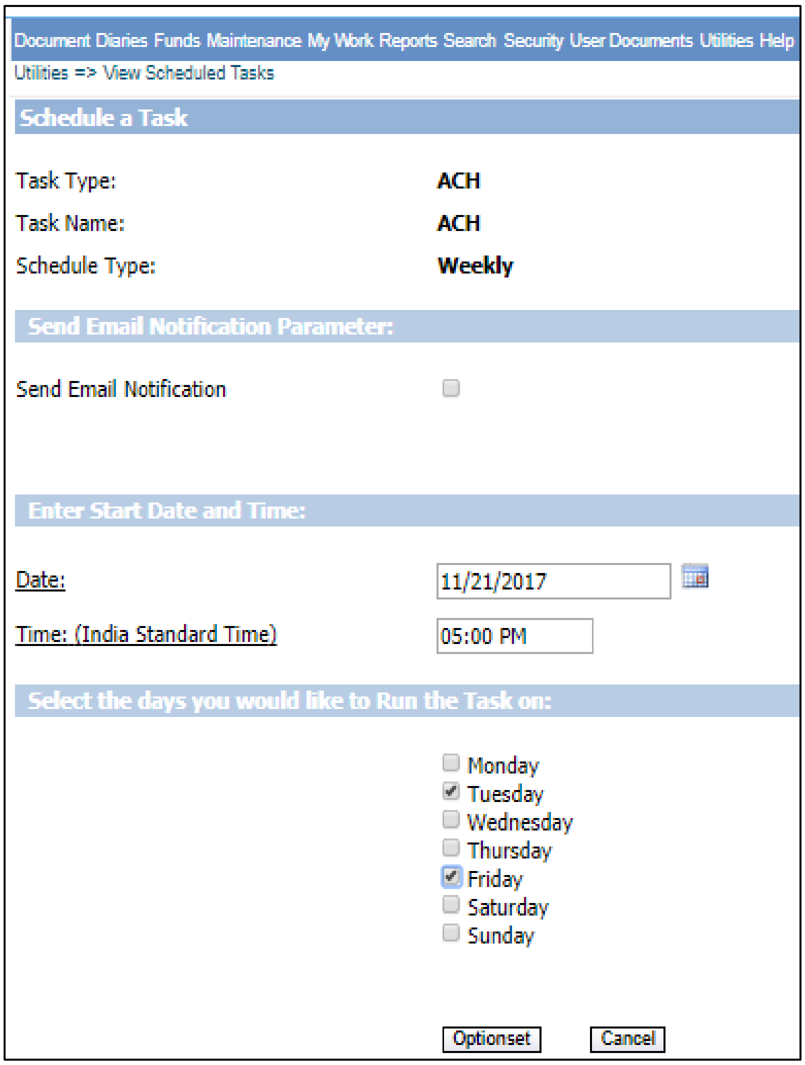
2. From the Task Type drop down list, select the type of task as ACH.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Periodically.
5. Complete the fields on the Schedule a Task: Periodically window as shown below:

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.

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 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.



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.

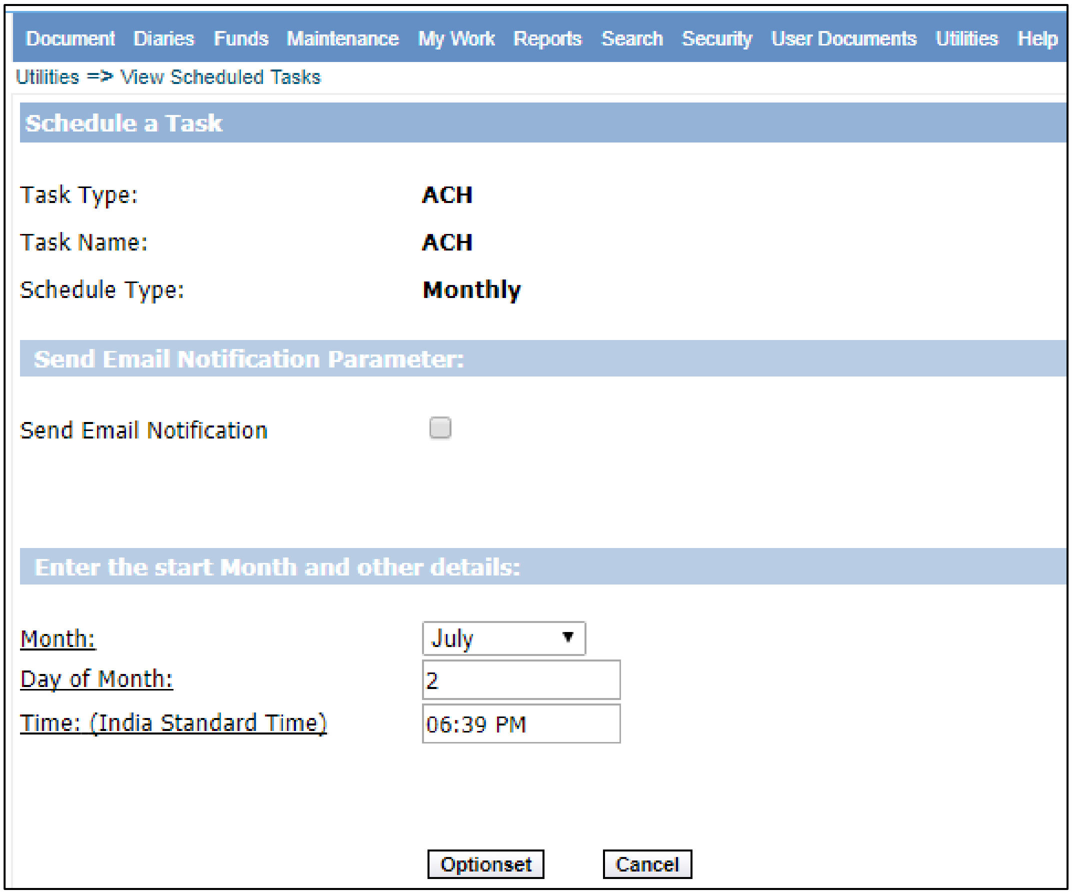
Select the days you would like to Run the Task on	Select the check box for a day of the week on which you want to run the scheduled task. **Note:** You can select more than one day to run the scheduled task.
Optionset	Select the button to open the ACH Optionset window.
Cancel	Select the button to close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

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 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.



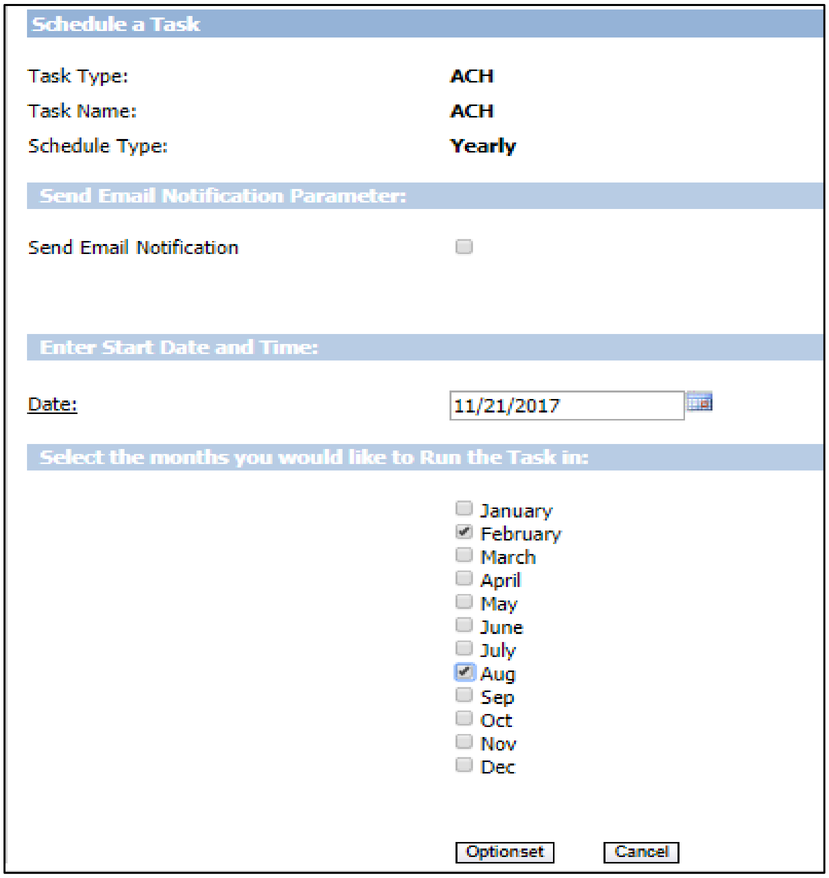
2. From the Task Type drop down list, select the type as ACH.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Monthly.
5. Complete the fields on the Schedule a Task: Monthly window as shown below:

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.



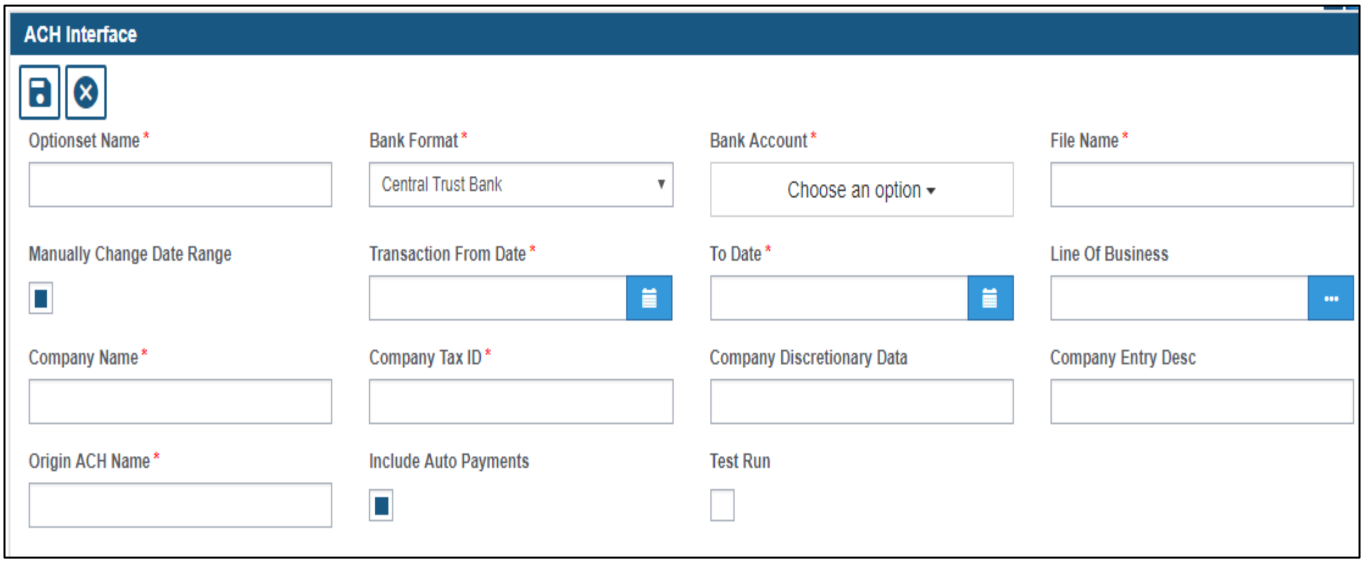
2. From the Task Type drop down list, select the type of task as ACH.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Yearly.
5. Complete the fields on the Schedule a Task: Yearly window as shown below:

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. **Note:** 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.
7. 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

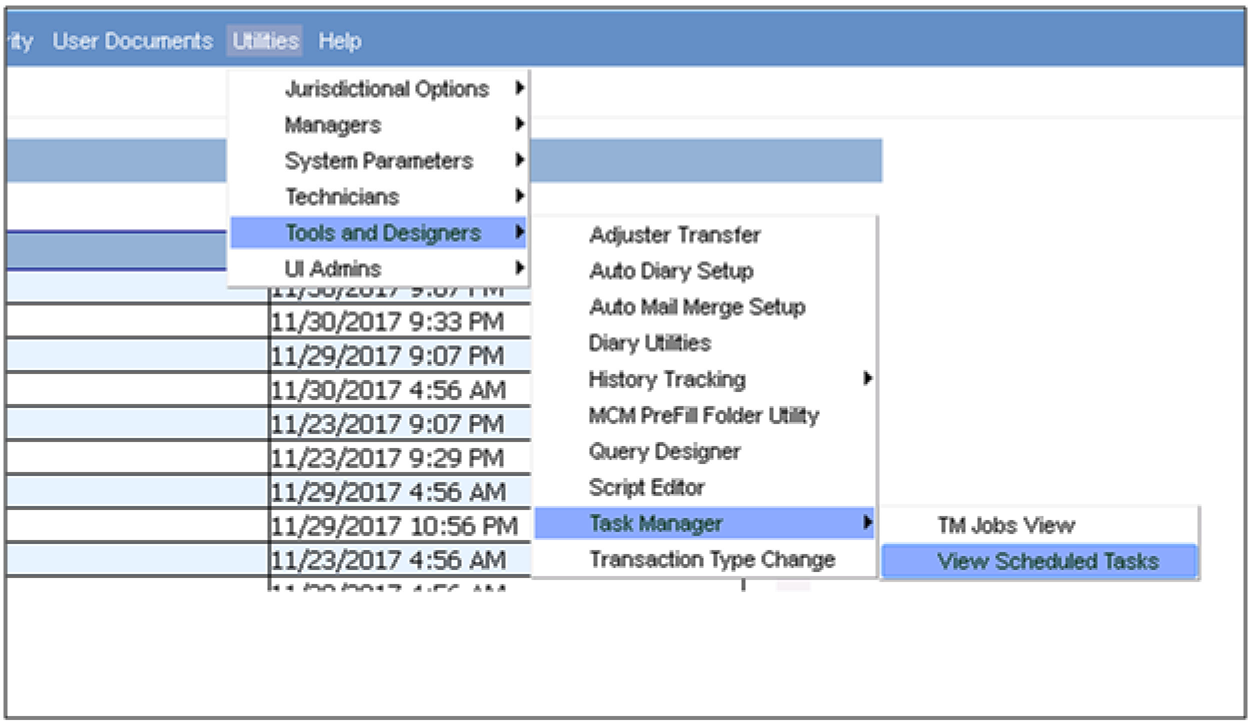
Optionset Name	Enter the name of the option set. The Option Name is required.
Bank Format	From the drop-down list, select the type of bank format to schedule the task.
Bank Account	From the drop-down list, select a bank account to extract the file to.
File Name	Enter file name of the target file.
Manually 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

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.

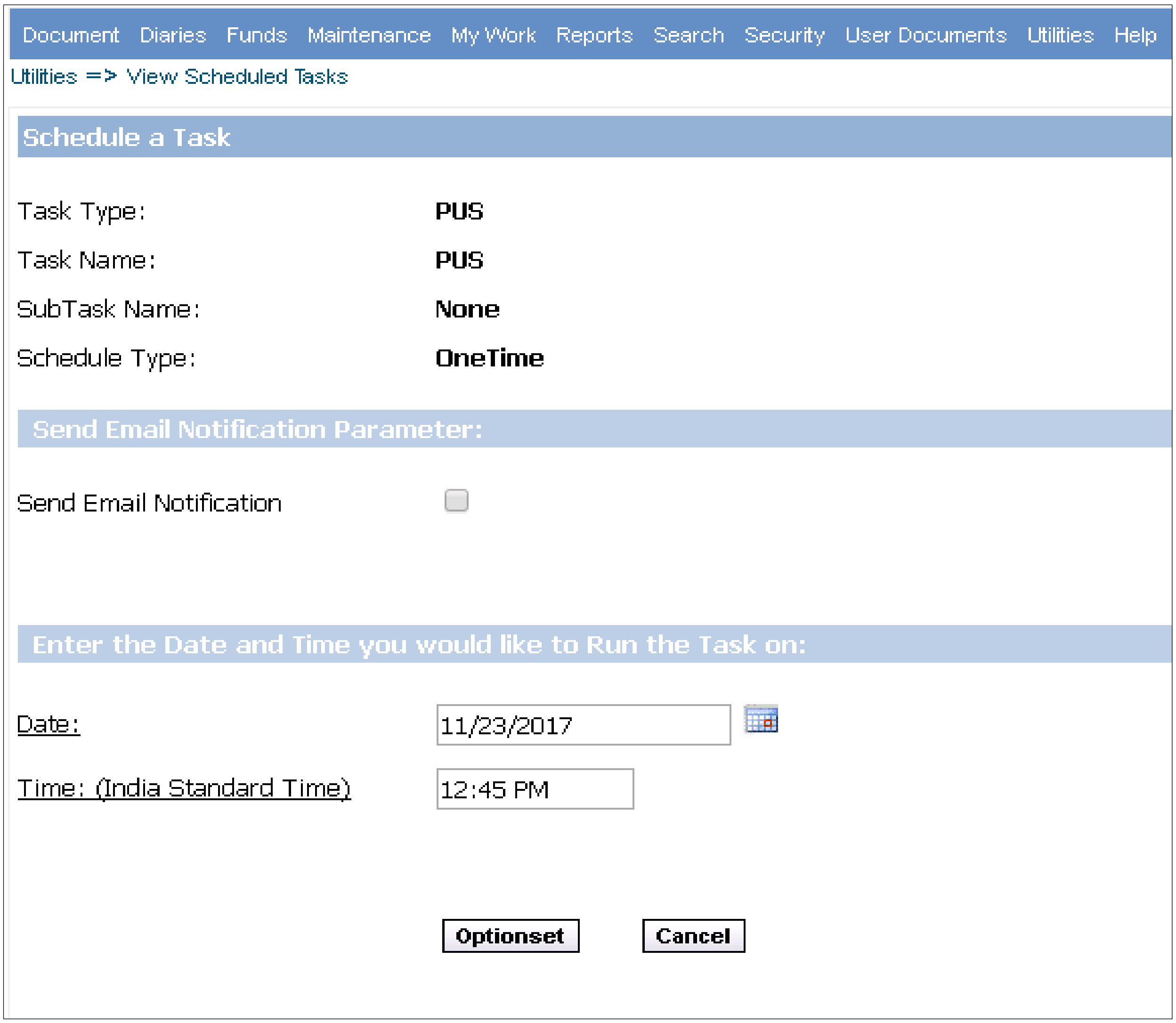


6. From the Task Type drop down list, select the type of task as PUS.
7. In the Task Name field, enter the name of the task.
8. From the Schedule Type drop down list, select the type of schedule as Onetime.
9. Complete the fields on the Schedule a Task: One Time as shown below:

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.



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.

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:

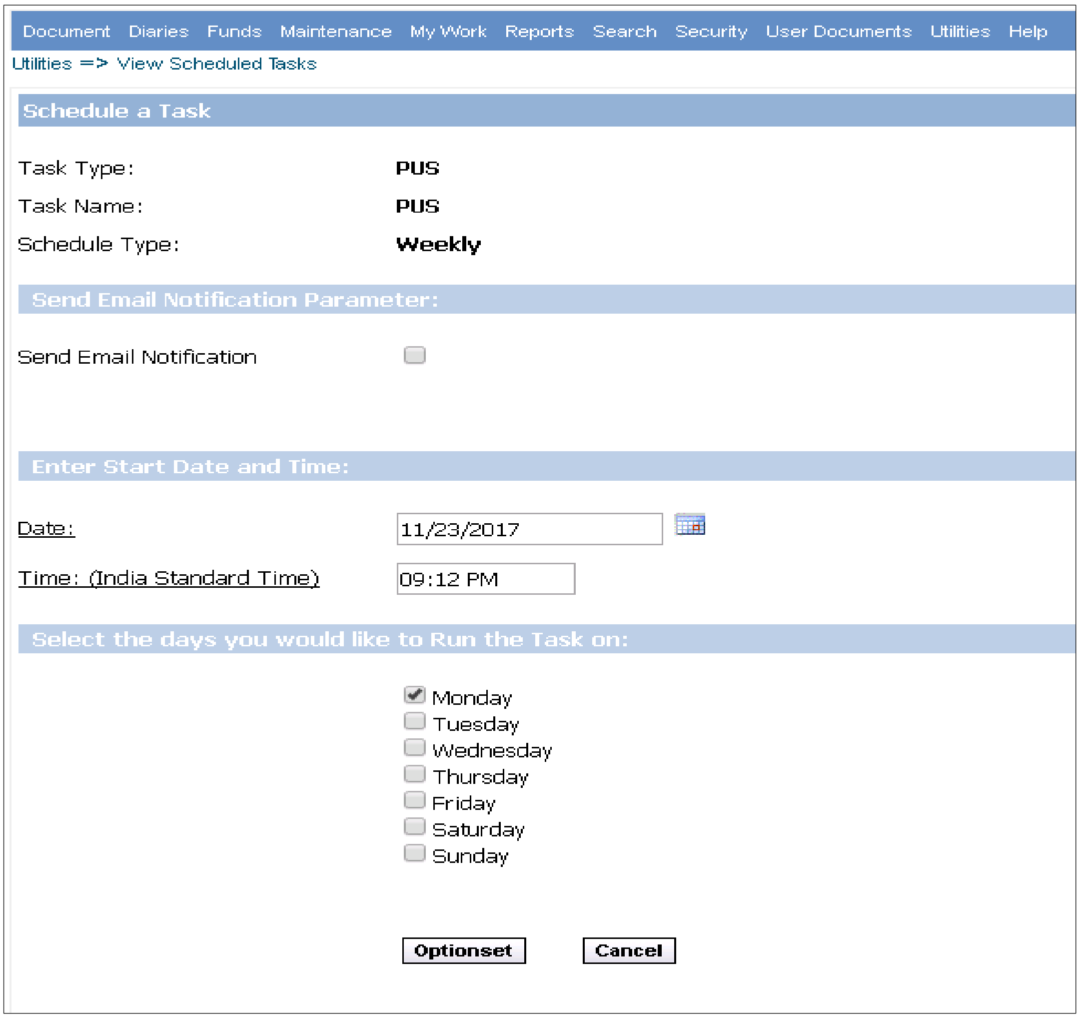
Enter Start Date and Time:	
Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Enter the interval after which to repeat the task:	
Interval Type	From the drop down list, select the type of interval after which you want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

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

6. 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.



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:

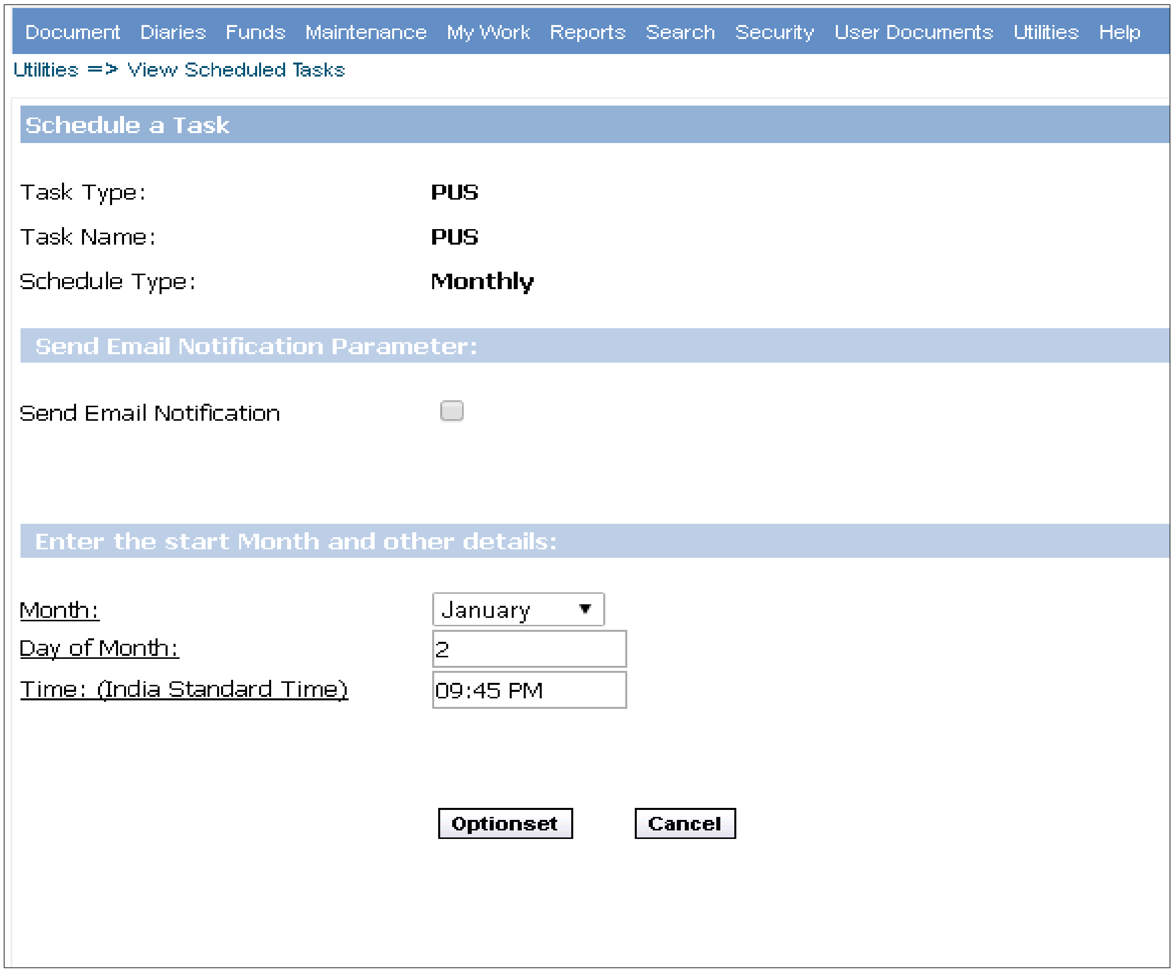
Enter Start Date and Time:	
Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.

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. **Note:** 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.

6. 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 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.



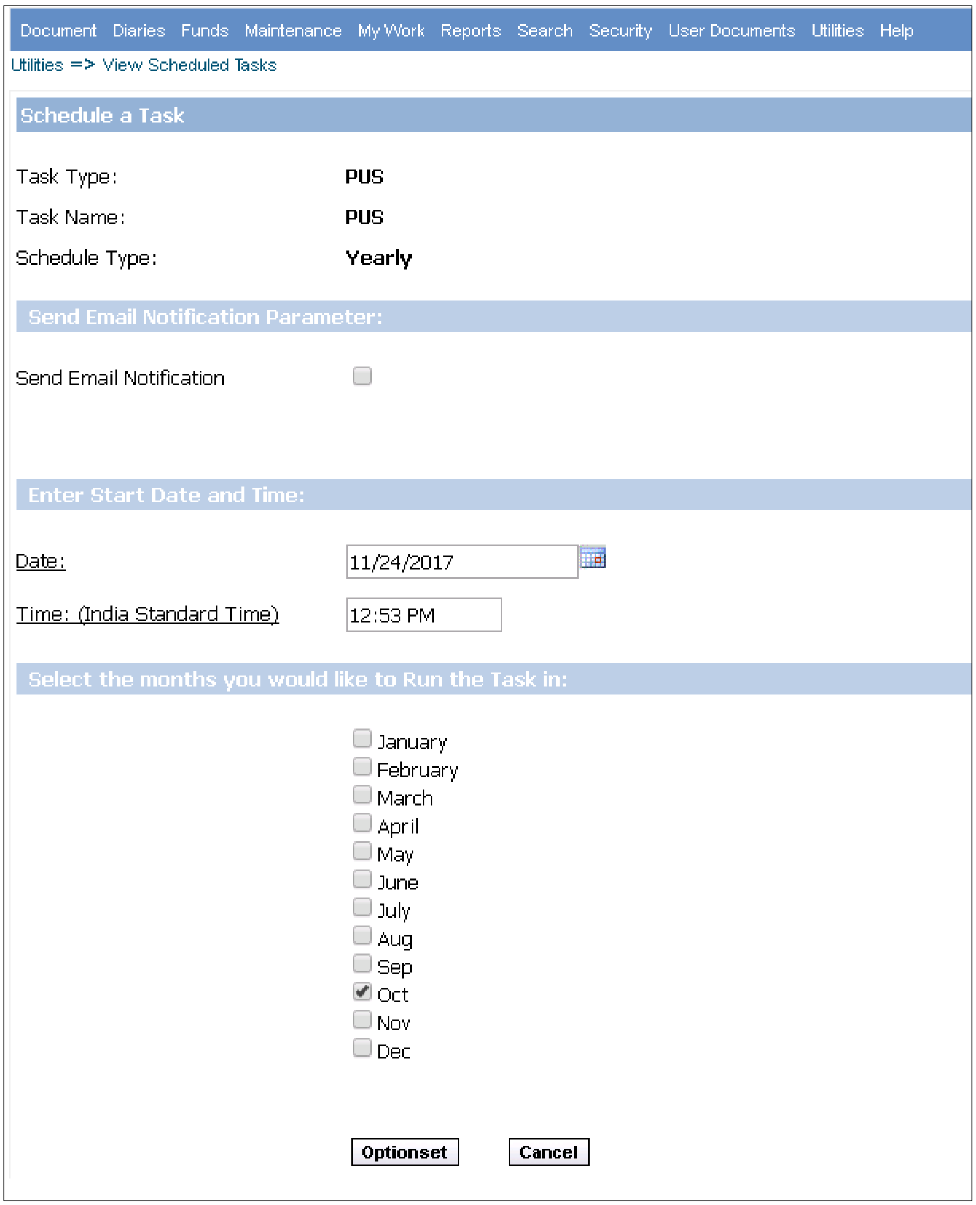
2. From the Task Type drop down list, select the type as PUS.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Monthly.
5. Complete the fields on the Schedule a Task: Monthly window as shown below:

Enter the start Month and 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 PUS Optionset window.
Cancel	Select the button to close the window without saving the changes.

6. 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

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



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.

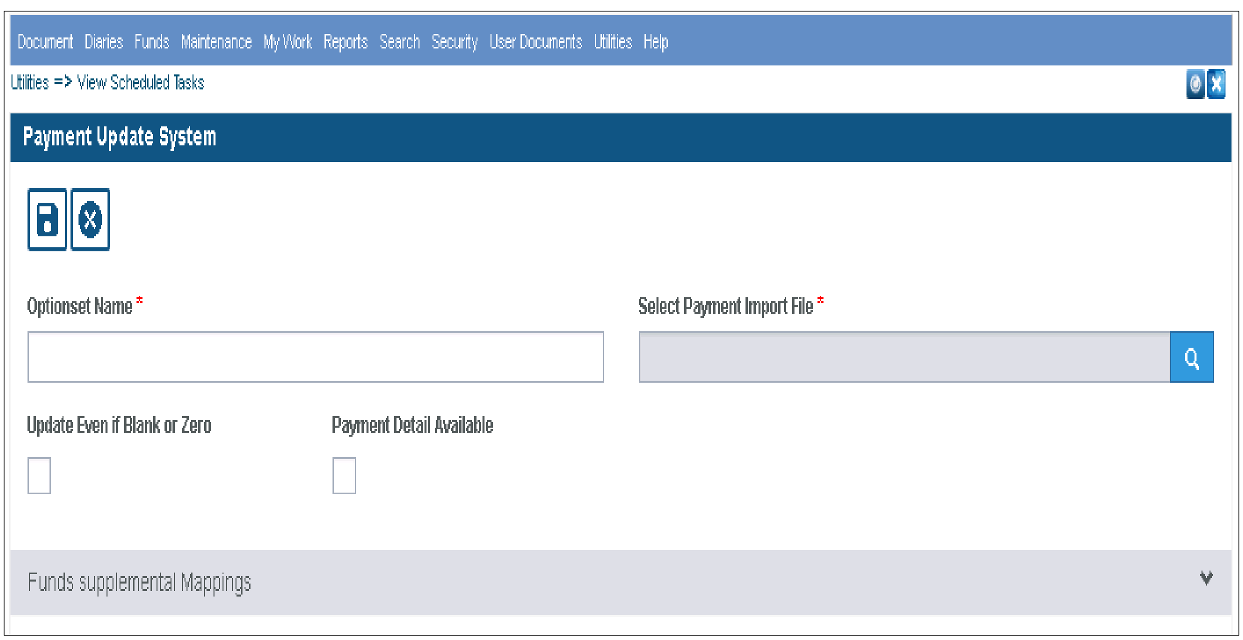
5. Complete the fields on the Schedule a Task: Yearly window as shown below:

Enter Start Date and Time:	
Date	Enter the start date of the scheduled task or select the date from the calendar.
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 PUS Optionset window.
Cancel	Select the button to close the window without saving the changes.

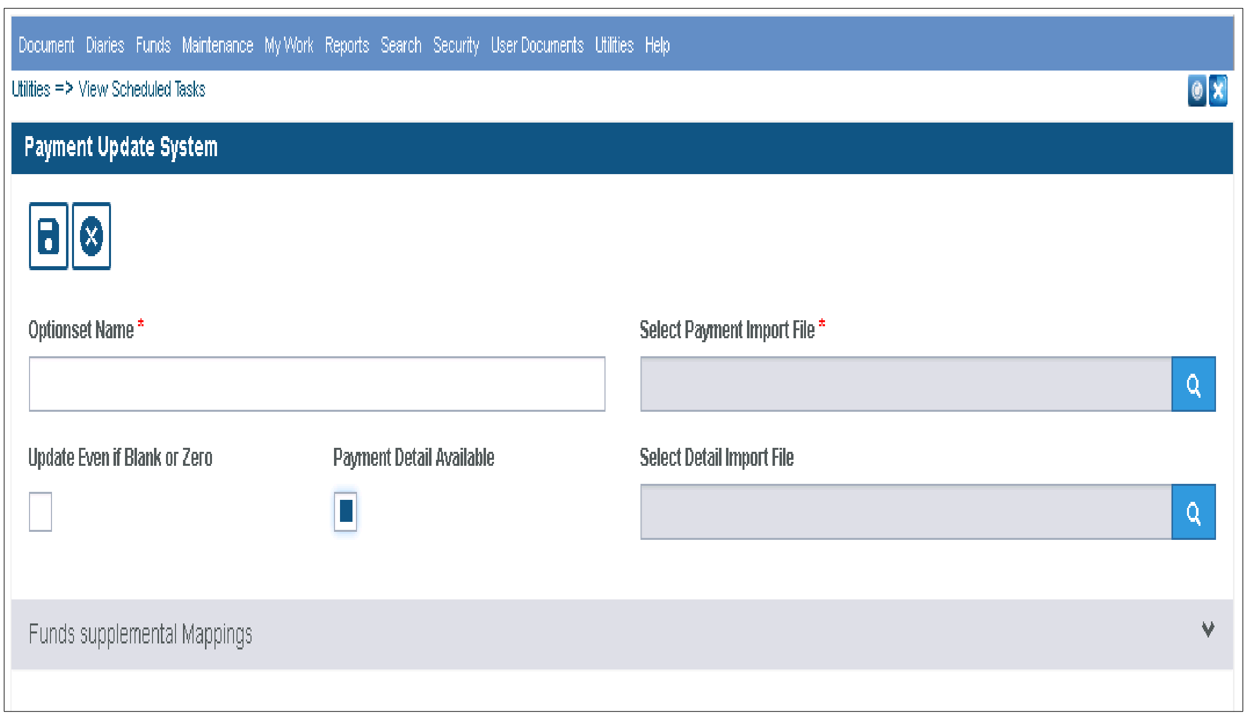
6. Select the Optionset button.
   The PUS Optionset window opens.
7. Complete the fields on the PUS Optionset window and select the Save button.
   The task is scheduled to run yearly.

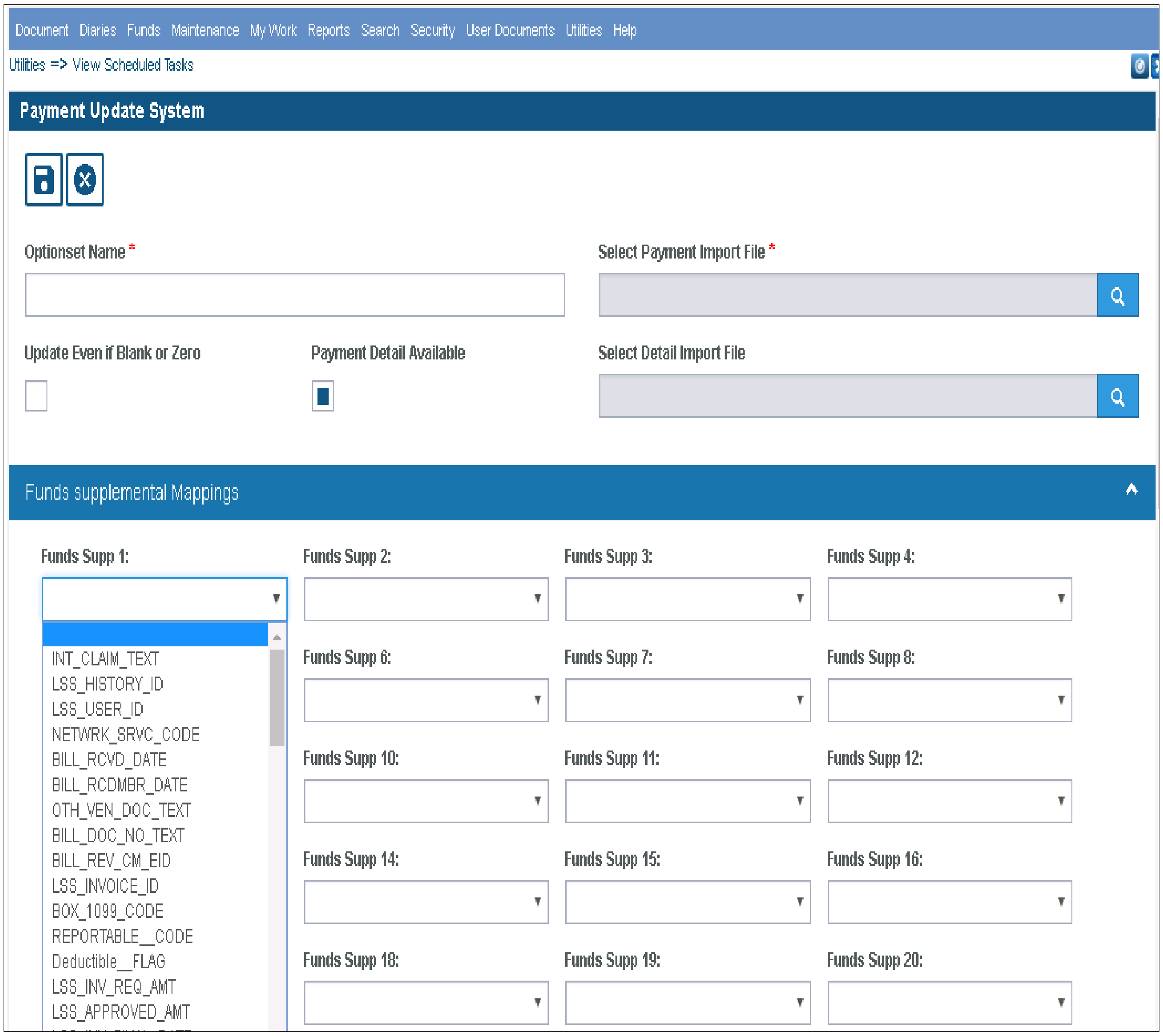
PUS optionset window

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



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.



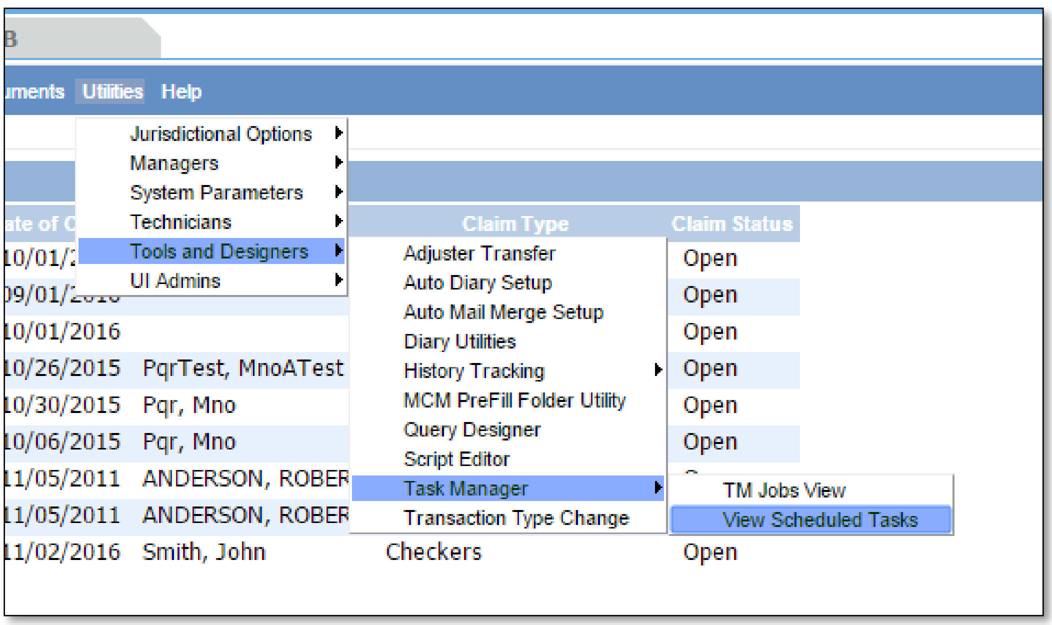


Funds Supplemental Mappings: These fields are used to provide extra information in the funds supplemental table. Dropdown list is provided to choose according to the requirement.

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.
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.

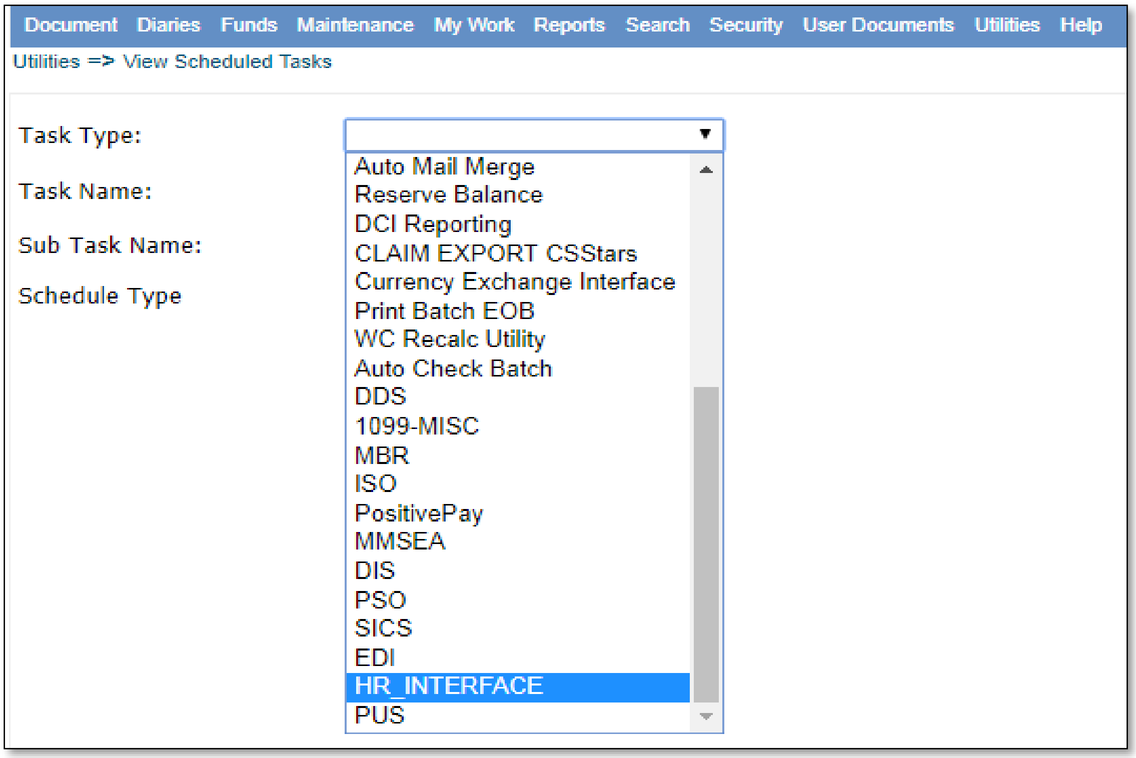


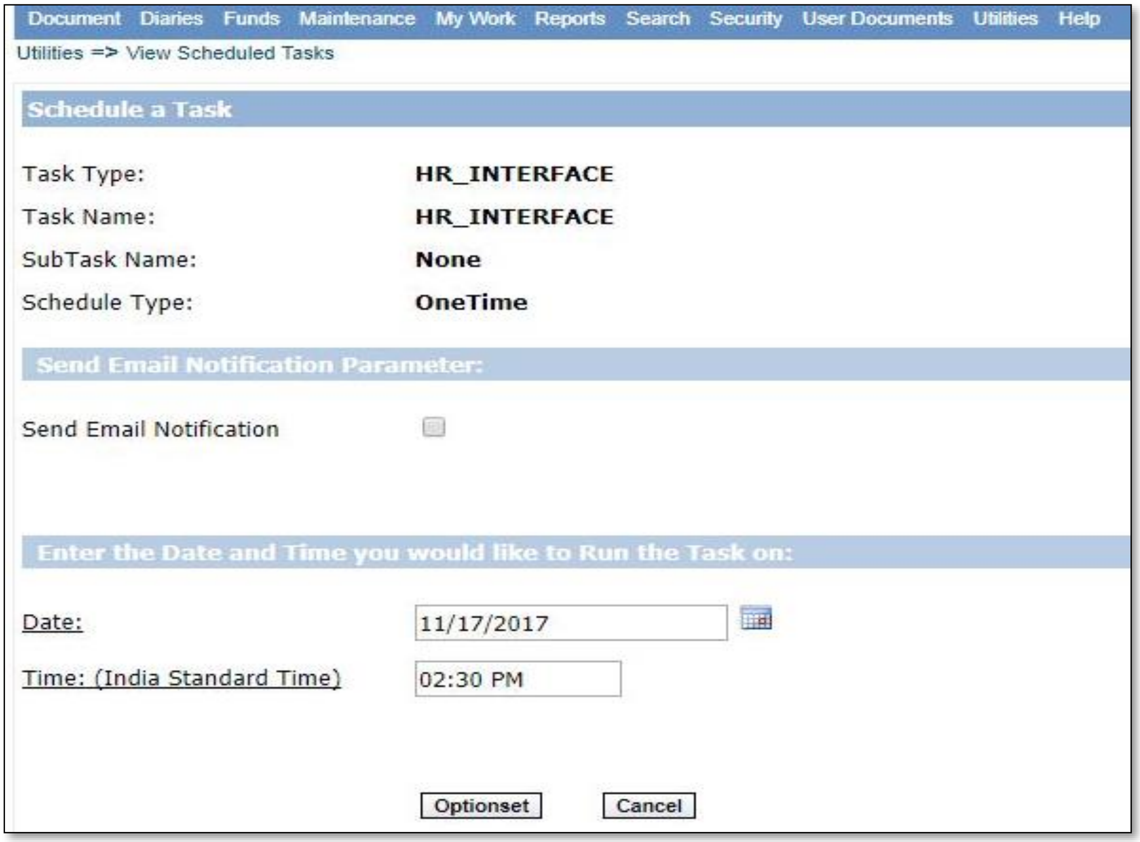
6. From the Task Type drop down list, select the type of task as HR Interface.
7. In the Task Name field, enter the name of the task.
8. From the Schedule Type drop down list, select the type of schedule as One time.
9. Complete the fields on the Schedule a Task: One Time as shown below:

Enter the Date and Time you 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.

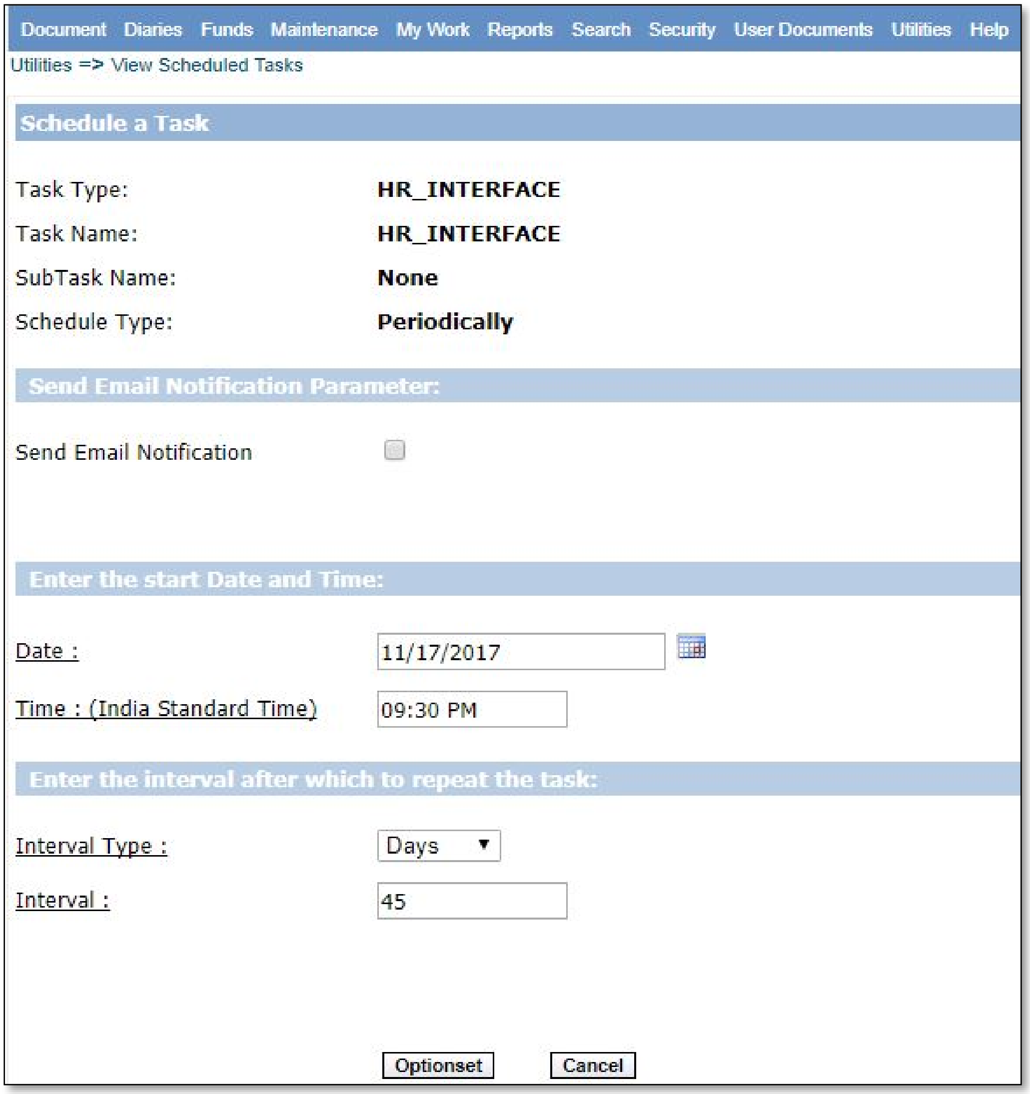
10. Select the Optionset button.
    The HR Interface Optionset window opens.
11. Complete the fields on the HR Interface Optionset window and select the Save button.
    The task is scheduled to run once.





To Schedule a HR Interface: Periodically

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



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:

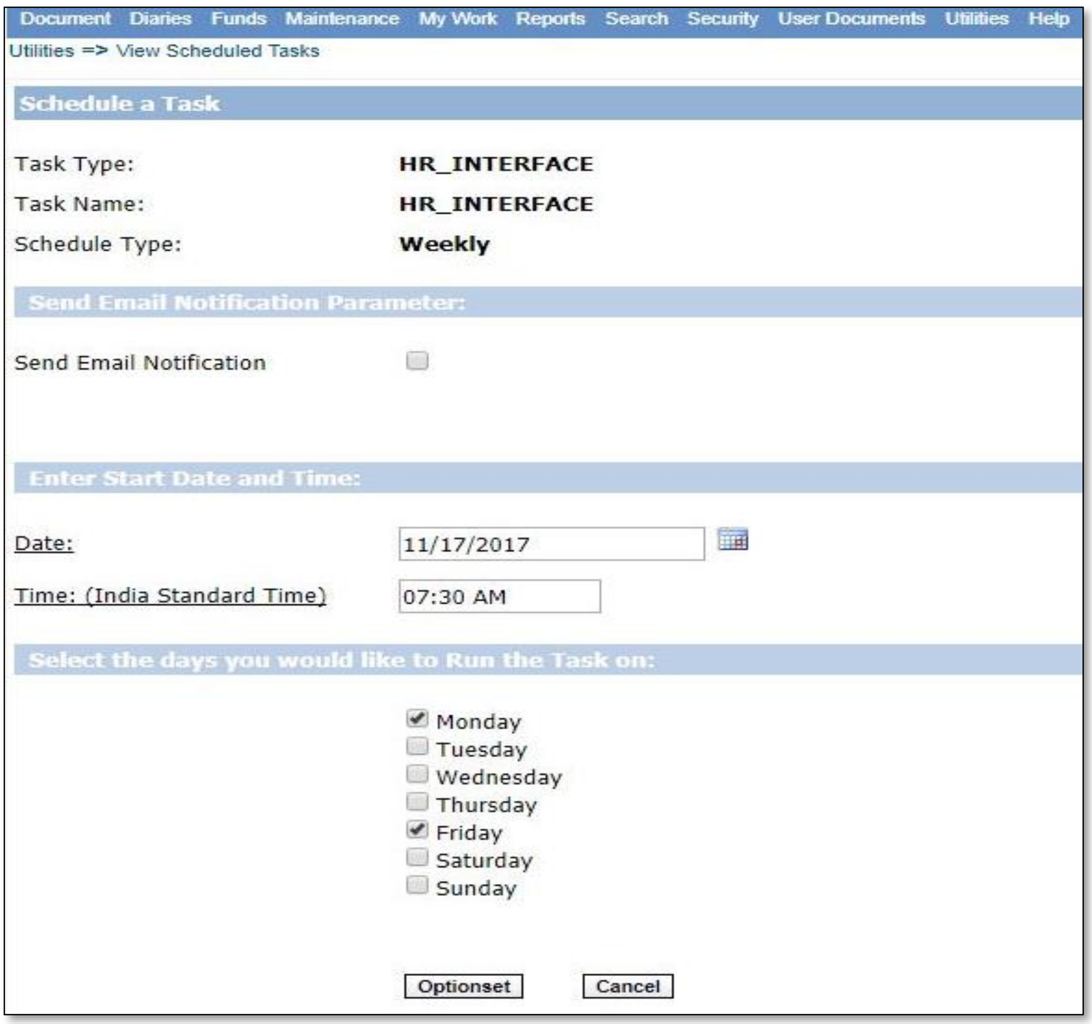
Enter Start Date and Time:	
Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Enter the interval after which to repeat the task:	
Interval Type	From the dropdown list, select the type of interval after which you want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

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



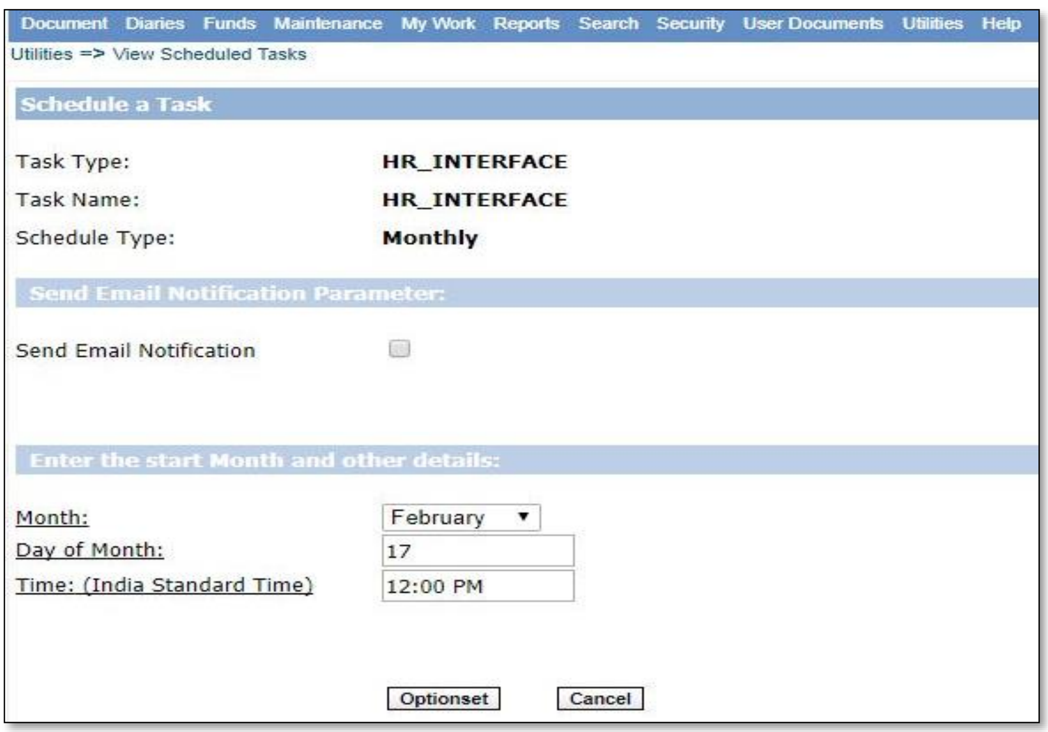
2. From the Task Type drop down list, select the type of task as HR Interface.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Weekly.
5. Complete the fields on the Schedule a Task: Weekly as shown below:

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 Task on	Select the check box for a day of the week on which you want to run the scheduled task. **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.



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

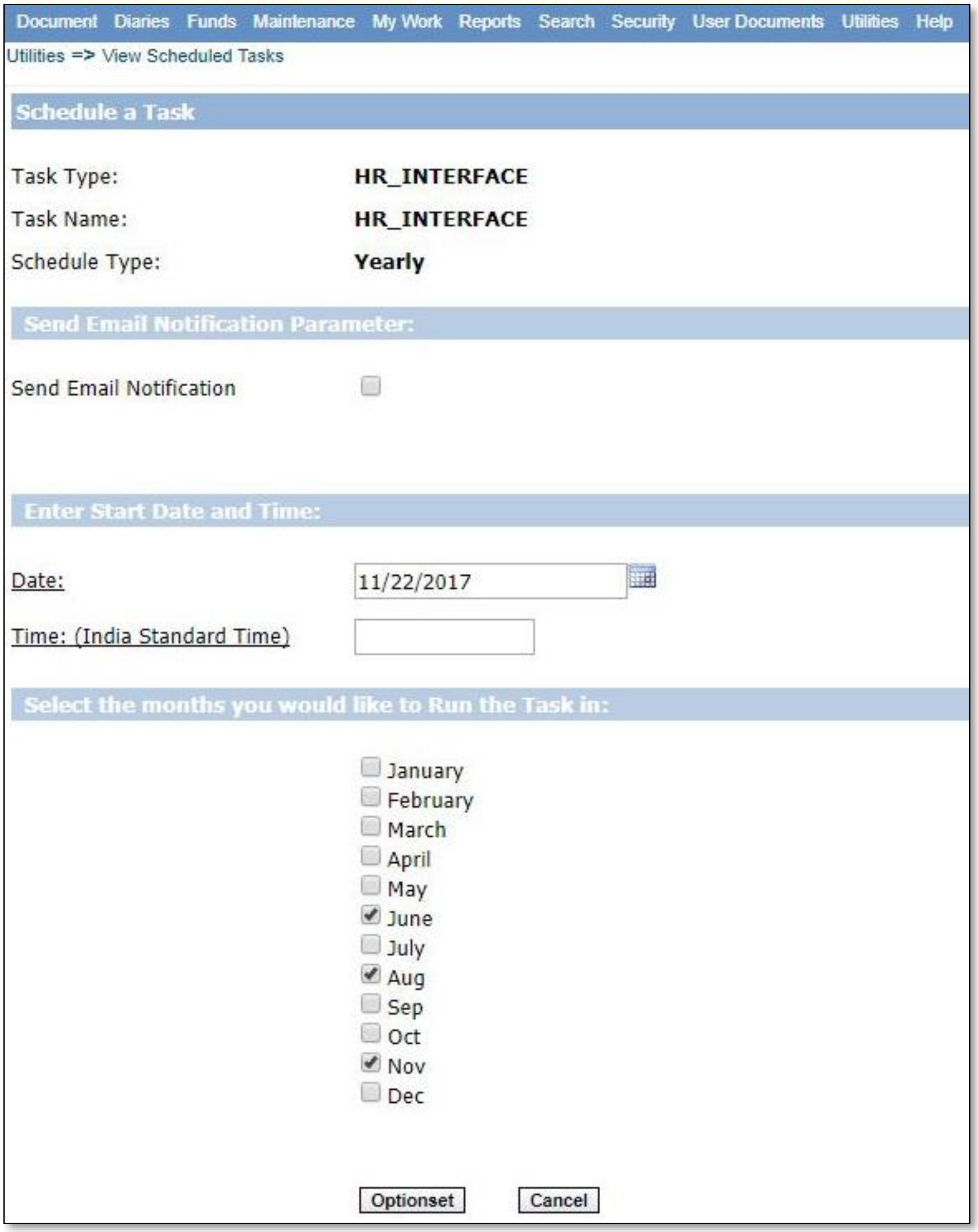
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Monthly.
5. Complete the fields on the Schedule a Task: Monthly window as shown below:

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.

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 monthly.

To Schedule a HR Interface: Yearly

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



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 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 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 yearly.

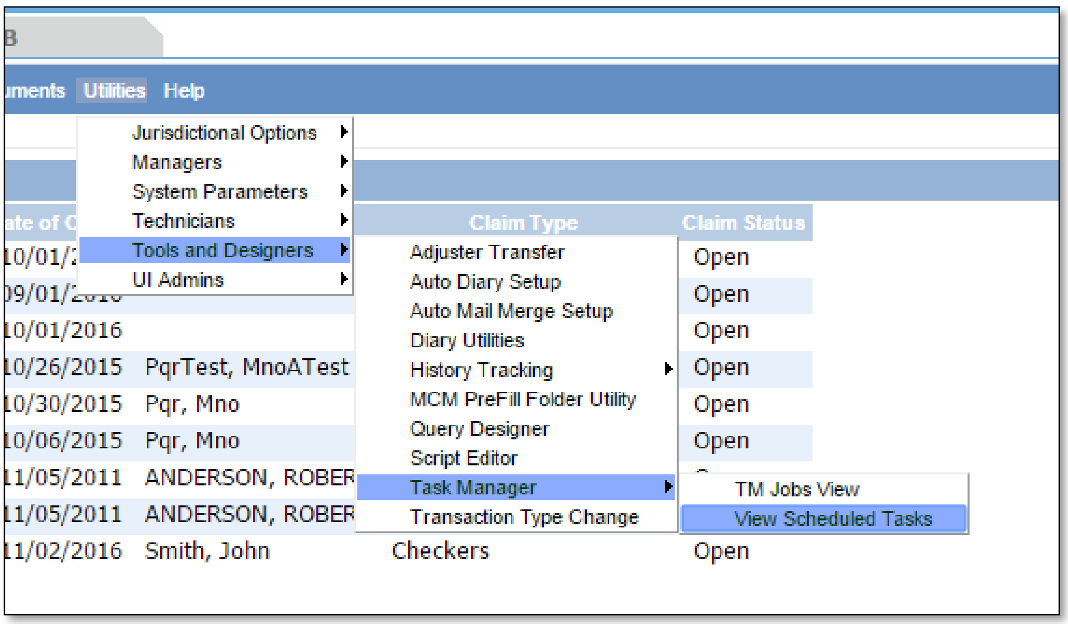
HR Interface Optionset window

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

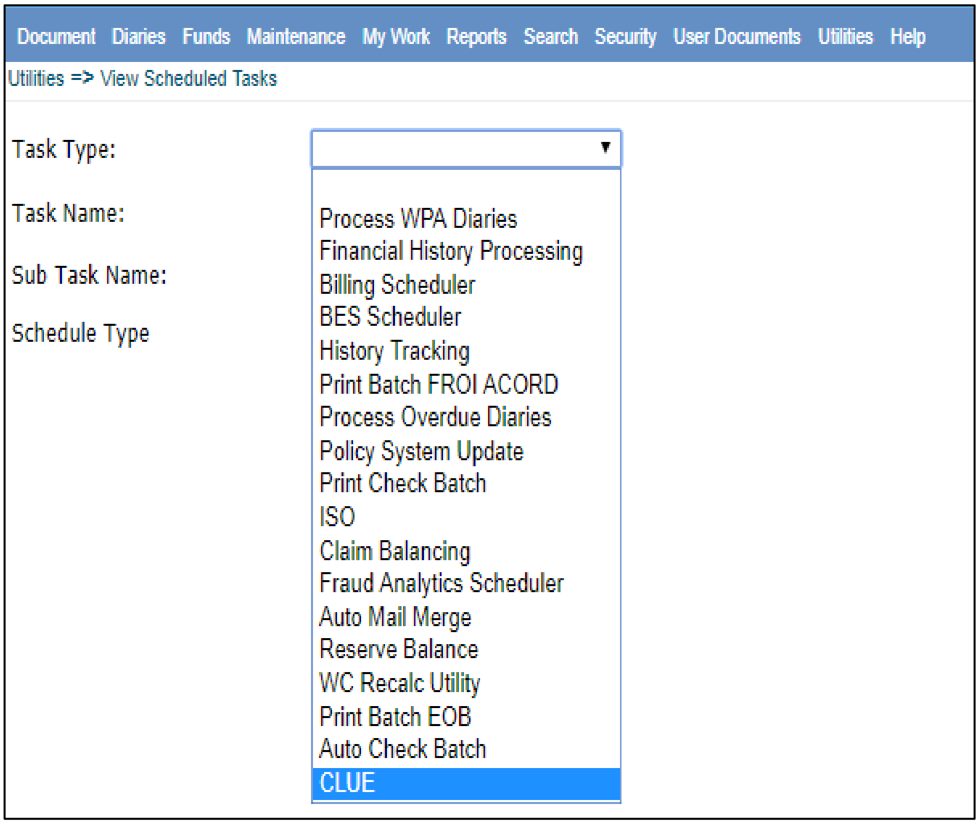
1. From the main menu, select Utilities.
   The Utilities menu opens.
2. From the Utilities menu, choose Tools & Designers.
   The Tools & Designers menu opens.
3. From the Tools & Designers menu, choose Task Manager.
   The Task Manager menu opens.
4. From the Task Manager menu, choose View Scheduled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

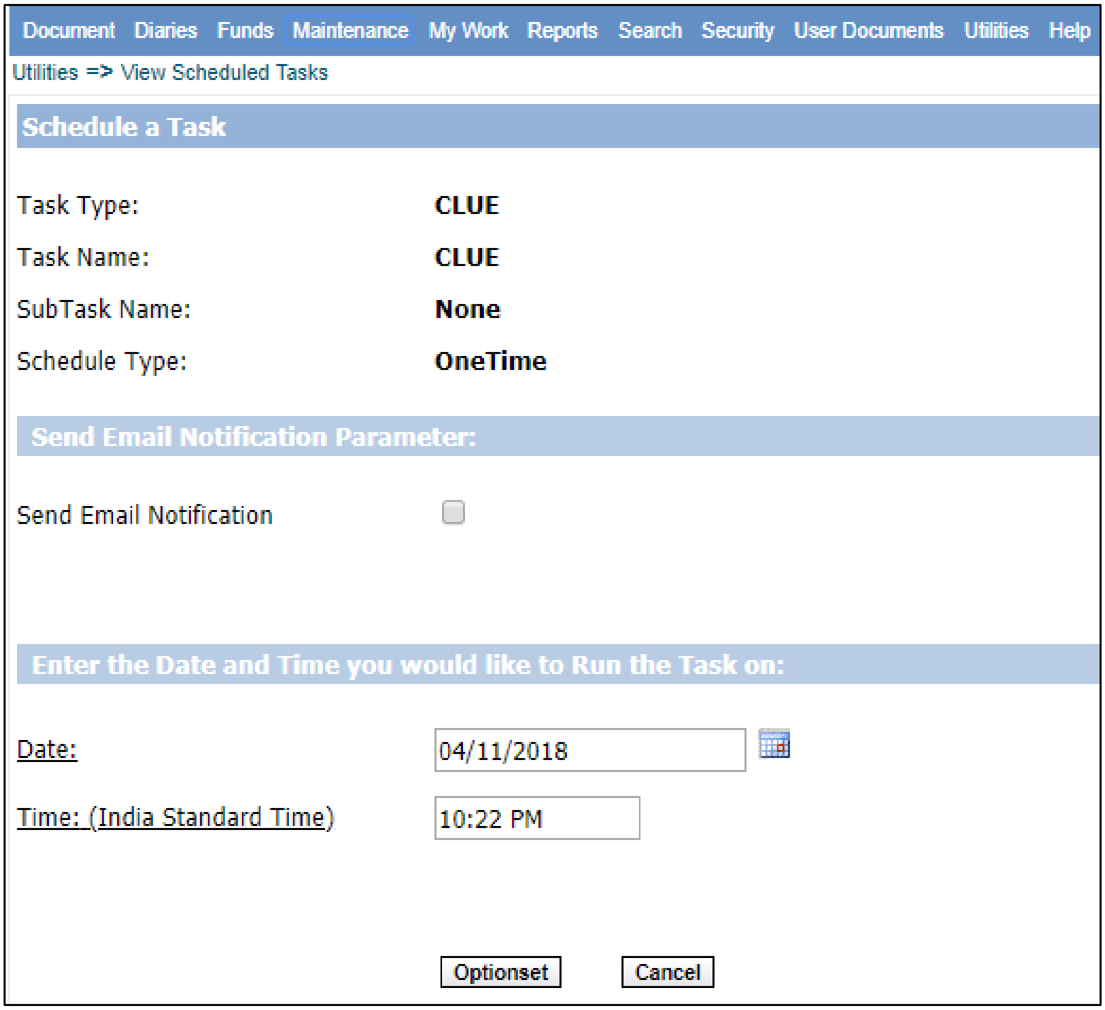


6. From the Task Type drop down list, select the type of task as CLUE.
7. In the Task Name field, enter the name of the task.
8. From the Schedule Type drop down list, select the type of schedule as One time.
9. Complete the fields on the Schedule a Task: One Time as shown below:

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.

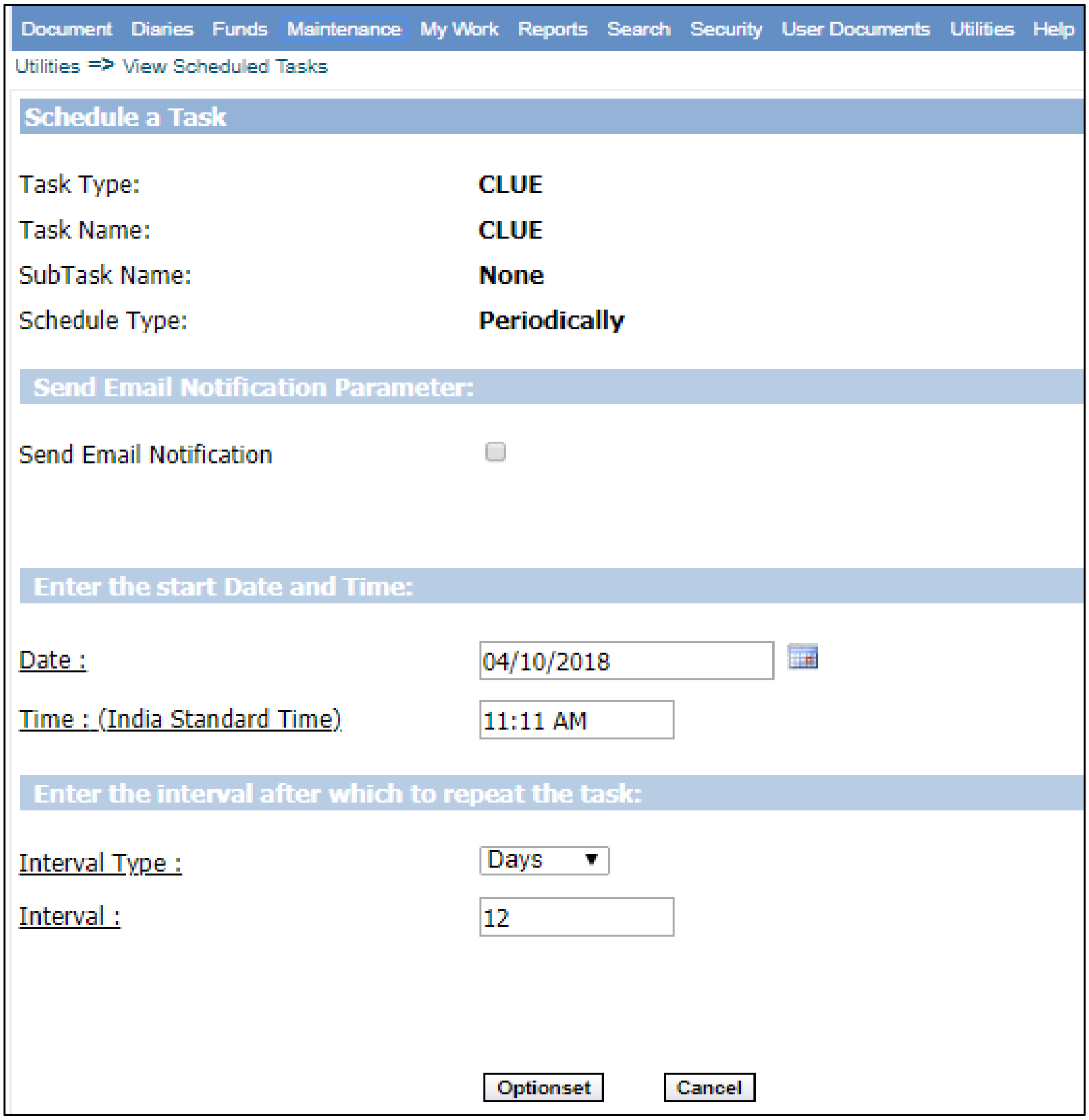
10. Select the Optionset button.
    The CLUE Optionset window opens.
11. Complete the fields on the CLUE Optionset window and select the Save button.
    The task is scheduled to run once.





To Schedule a CLUE: Periodically

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



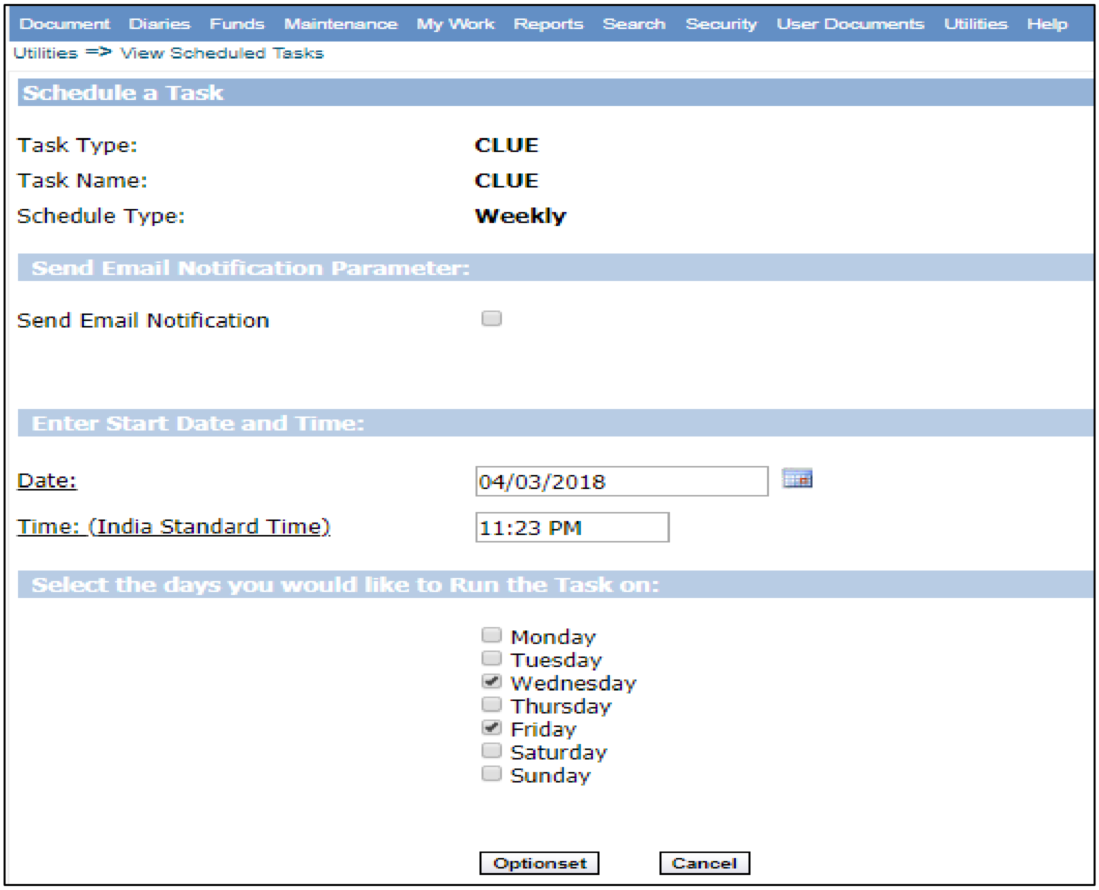
2. From the Task Type drop down list, select the type of task as CLUE.
3. In the Task Name field, enter the name of the task.
4. From the Schedule Type drop down list, select the type of schedule as Periodically.
5. Complete the fields on the Schedule a Task: Periodically window as shown below:

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.

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 periodically based on the defined interval.

To Schedule a CLUE: Weekly

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



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:

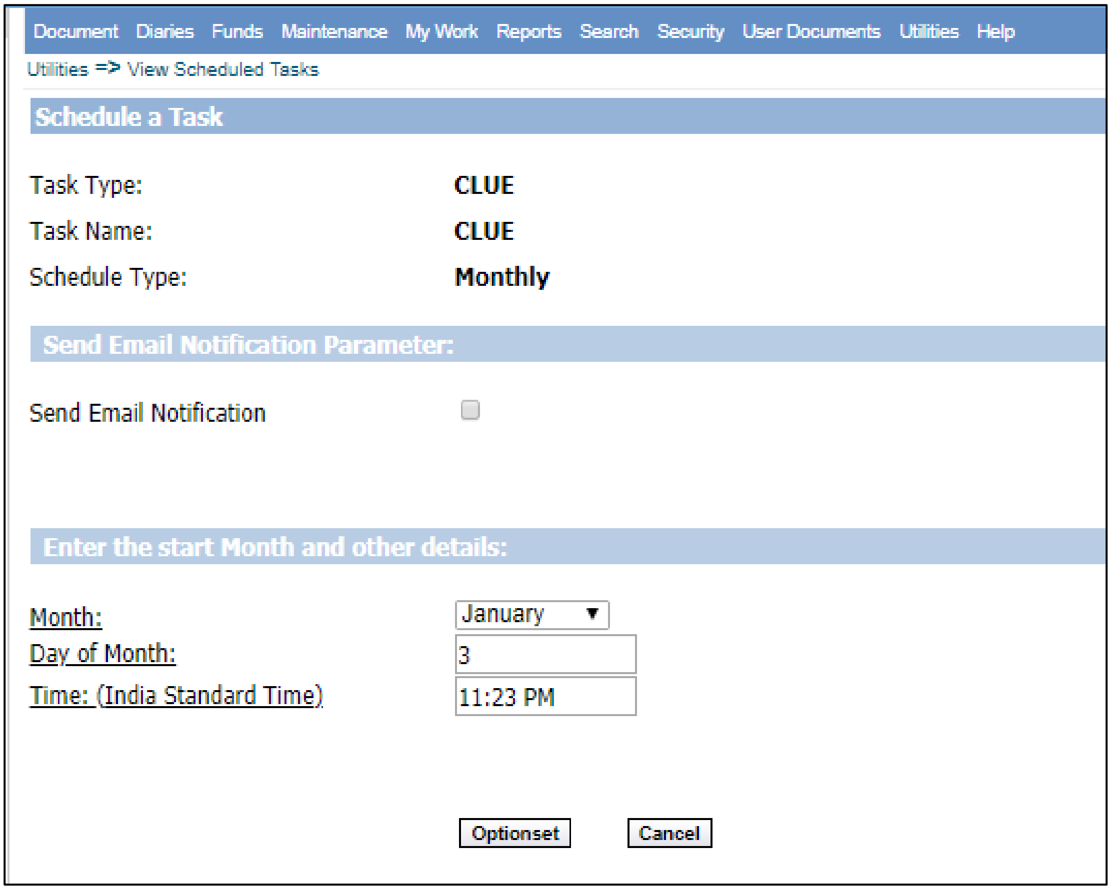
Enter Start Date and Time:	
Date	Enter the start date of the scheduled task or select the date from the calendar.
Time	Enter the start time of the scheduled task.
Select the days you would like to Run the Task on	Select the check box for a day of the week on which you want to run the scheduled task. **Note:** 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.



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:

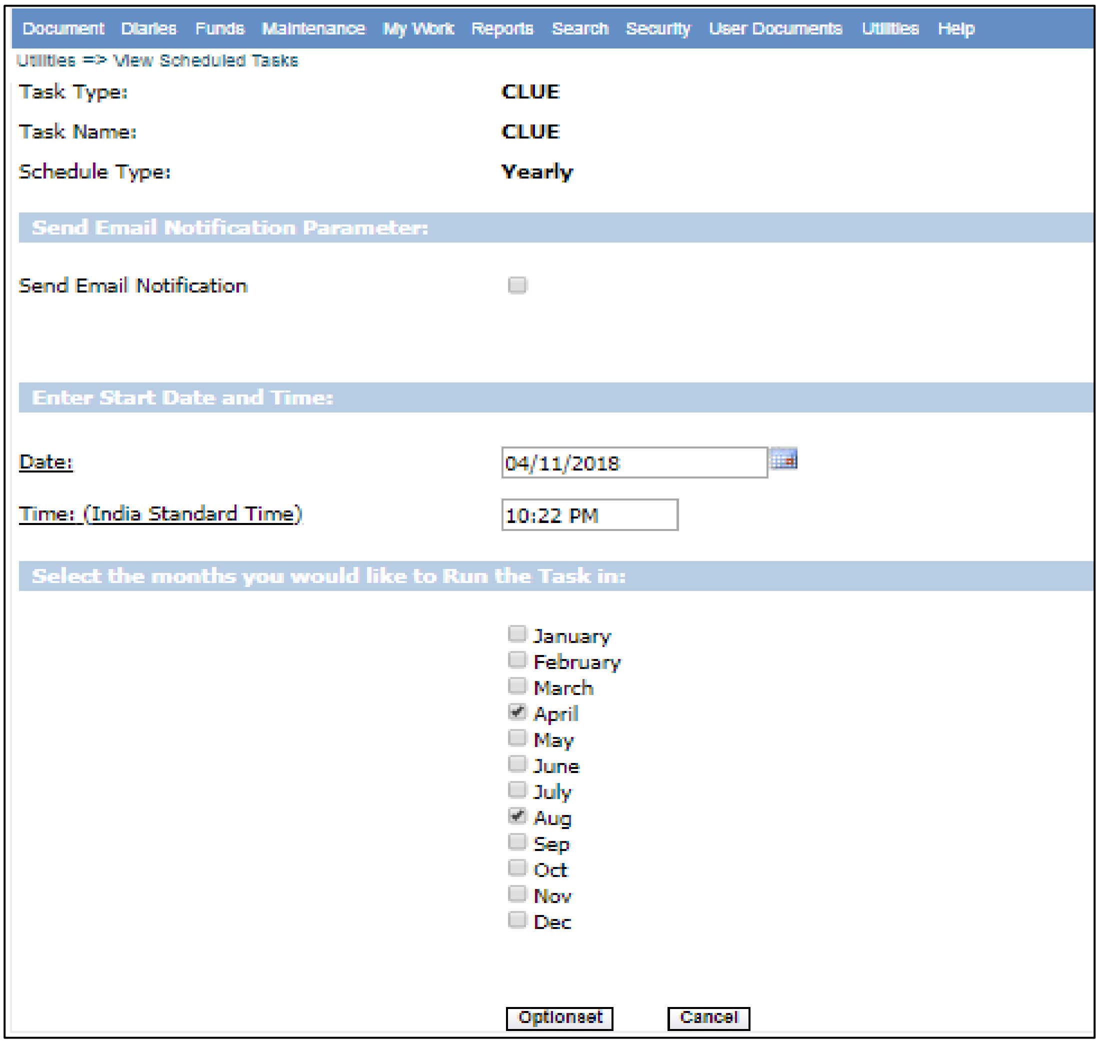
Enter the start Month and other details	
Month	From the dropdown list, select the month in which you want to schedule the task.
Day of Month	Enter the date on which you want to schedule the task in the selected month.
Time	Enter the start time of the scheduled task.
Optionset	Select to open the CLUE 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

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



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 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 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 yearly.

C.L.U.E. Optionset window

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

