

CS Admin, phase 2 Wireframes, v.10.5

Excerpts

This project went on intermittently for about two years. It was so large that it was broken into two phases. Between the two phases, the wireframes added up to about 100 pages. This PDF includes only certain pages from the phase 2 wireframes. For a couple of months during the latter stages of phase 2, a colleague (Ray Fowler) filled in for me while I was busy on other projects, so his name appears a few times in the Revisions History.

--John Boykin

Latest version: CSAdminWires.vsd

Summary

This is the second of 2 documents for the redesign of CS admin. The first applied to the parts of the site that would launch in phase 1; this document applies to phase 2 (mostly provider pages, plus miscellaneous pages that did not make it into phase 1). Refer to the most recent set of phase 1 wireframes and the BRD for anything that is not addressed in this document.

Notes

Sequence: Pages are sequenced in this document in the same order they appear in the tab and subtab sequence.

All page numbering has changed since v.0 of this document.

Subtabs have changed on some tabs since the Phase 1 wireframes were completed.

Search: No search should be case-sensitive. No search results should be case-sensitive.

Terminology: This document uses the following terminology to distinguish the various parties involved:

BSC personnel

Rep = Generic term for BSC employee CS Admin users, regardless of their authority level. But when used in juxtaposition with Admin and Super admin (such as on page CS12.4), Rep means an ordinary CS Admin user who lacks the additional authority of an Admin or Super Admin.

Admin = BSC employee CS Admin user in the second highest authority level.

Super Admin = BSC employee CS Admin user in the very highest authority level.

Provider personnel

User = Regular user in provider's office with no special privileges, who typically has an account manager at least nominally over them

Account manager = Person in provider's office who has more privileges than regular users

This design also draws an important distinction between a person and an institution. If a rep has a name or other info that would identify an individual human being who works at an institution, they would use the "Search a person" search widgets. If, however, the only search criteria the rep has to work with is for an institution, then they would use the "Search an institution" search widgets; from there they would drill down to find a person to spoof.

While there may be a few cases in which a provider consists of a single individual, we must design for the most likely case, not edge cases. Besides, even those individuals wear their institutional hats at certain times. So this document uses the following terminology:

Person = Generic term for account manager and/or user

institution = Any kind of institution, including the business identity of a lone provider who has no staff

PIN vs. Tax ID Number (TIN): A PIN is not the same thing in the context of CS Admin that it is in other contexts, such as a bank's ATM. It is not a Personal Identification Number, but a Provider Identification Number. All a PIN does is identify the provider in the system. A PIN is associated with a single Tax ID, but a Tax ID can have zero to many PINs associated with it. PIN is a child to a Tax ID in a child-parent relationship. So if you are searching by PIN in CS admin, it will roll up to a single Tax ID. If searching by Tax ID in CS Admin, you can get a Tax ID with many PINs.

Pressing enter has the same effect as clicking the default selected button, typically Submit.

Benefit Lookup: This document does not include a Benefit Lookup page, because that page has already been redesigned in a separate project in summer 2007. That redesign has not yet been implemented. Until it is, we will continue to use the temporary pickup configuration described in the wireframes for Phase 1, except that we are now adding subtabs, as described on page 3 of this document.

Revisions

See final pages for earlier revision history

6/18/2009 v. 10.5 John Boykin

Revisions based on June 2009 usability testing, highlighted with red type in the annotations:

Spooing indicator: Remove exclamation point

PV2 User account results:

- Replace search widget with link
- Eliminate duplicate listings
- PV3a and PV3b provider profiles
 - Replace link on account manager's name with new Profile link
 - Specify format of long lists of tax IDs
 - Move locked tax ID icon key above tax ID table
 - Notes is no longer a required field
 - Pointed out deviation from original spec about text inside Notes box

PV3b Persons profile (account manager)

- Moved list of users' names below list of tax IDs
- Clarified spec about formatting of users' names
- Added spec about highlighting labels of problematic fields in error situations THROUGHOUT SITE

PV 3.1 Tax ID details: Pointed out need for PINs to be in numerical order

PV7.1 Tax ID details (lock/unlock Tax ID): Dialog box must be big enough so it does not scroll

4/06/2009 v10.4 Ray Fowler

Pages 29 – Added PINs column to Locked IDs results

3/24/2009 v10.3 Ray Fowler

Pages 18-19 - inserted third "address" line, added * to the User ID label and added text to indicate that fields with * are required

3/2/2009 v10.2 Ray Fowler

Pages 8 - inserted the text "or" between the search options. User can search by either "name" or "number"

2/27/2009 v10.1 Ray Fowler

Pages 8-9 - inserted the text "or" between the search options. User can search by either "name" or "number"

Pages 10,11,13 – Adjusted the "member number" from 3 digit to 2 digit.

Page 11- Added annotation E

Pages 16,17, 30, 31 – Changed the Account Status "Any" to "All". Also adjusted applicable annotations.

Page 17- Added additional status symbols for Registered and Pending and updated annotation "I"

Page 18 - Added "lock" symbol next to tax id in the profile, added annotation "R" and updated annotation "I"

Pages 18-19 – Removed provider name data from the "associated user" list. Added "extension" to phone fields

Page 19 – Made both the name and the user id the link in the "user s associated" section.

Page 20 – Add a "return to search results" link, added annotation "I" and updated annotation "B"

Page 25 – Adjusted the "return to search results" link to be consistent with pg. 20, updated annotation "C" "D" and "E". Made "users registered" links both the name and the user id.

Page 26 – Updated page to reflect how the Tax ID detail (unlock/lock) functions should work. Page is now named PV7.1

Page 30 – Added "Reports" link to sub nav.

Page 48 – Changed the "Status" radio buttons to check boxes

2/9/2009 v10.0 Ray Fowler

Made changes per Kimberly Skuta's email

2/6/09 v9.9 Mick Lockey

Updated copy and applied BSC Online Style; corrected misspellings, fixed inconsistent headings, etc.

2/5/2009 v9.8 Ray Fowler

Cleaned up page names for consistency and updated annotations

2/4/2009 v.9.7 Ray Fowler

Reformatted content of page 25

Reformatted content of page 31 and added page "32"

1/12/2009 v.9.6 Ray Fowler

My Changes

AUTHOR	TITLE	FILENAME	CREATE DATE	REVISED	PAGE
John Boykin	CS Admin, Phase 2	CSAdminWires.vsd	8/28/2007	11/8/2009	1 OF 25

What wireframes are -- and aren't

Wireframes are like a blueprint. Their purpose is to express the idea of the site or page(s), not to spell out every detail that might carry out the idea.

What Wireframes Give You

Wireframes document:

- structure of the site
- interrelations among pages
- navigation
- what elements are present on each page, their approximate placement and importance
- functionality, where it goes, and what steps users must take to complete a given task
- changes from the status quo, if any
- recommended wording for key elements

What Wireframes Do Not Give You

While some wireframes may be more detailed or ambitious than others, their purpose is limited. They make the plan for the site/pages concrete so everyone understands what we're working toward, but they are not place to look for certain details of execution. Wireframes are not meant to be the sole basis on which the site is developed or QA'ed.

Wireframes will <u>not</u> give you	Appropriate source for that
Colors	Comps
Art specifics (subject, exact placement, exact size or aspect ratio, etc.)	Comps
Exact placement and sizes of elements	Comps
Framework elements (e.g., boxes, lines, background shading)	Comps
Fonts and type treatment	Comps
Content wording*	Copy deck
Latest business rules (e.g., which data to show, which users have access to what, which products are offered, password formats, etc.)	BRD

*A word about wording

Wording shown for menus, navigation elements, icons, links, and action buttons should generally be considered a very strong recommendation. They have generally been carefully chosen, and changes to them should not be made lightly.

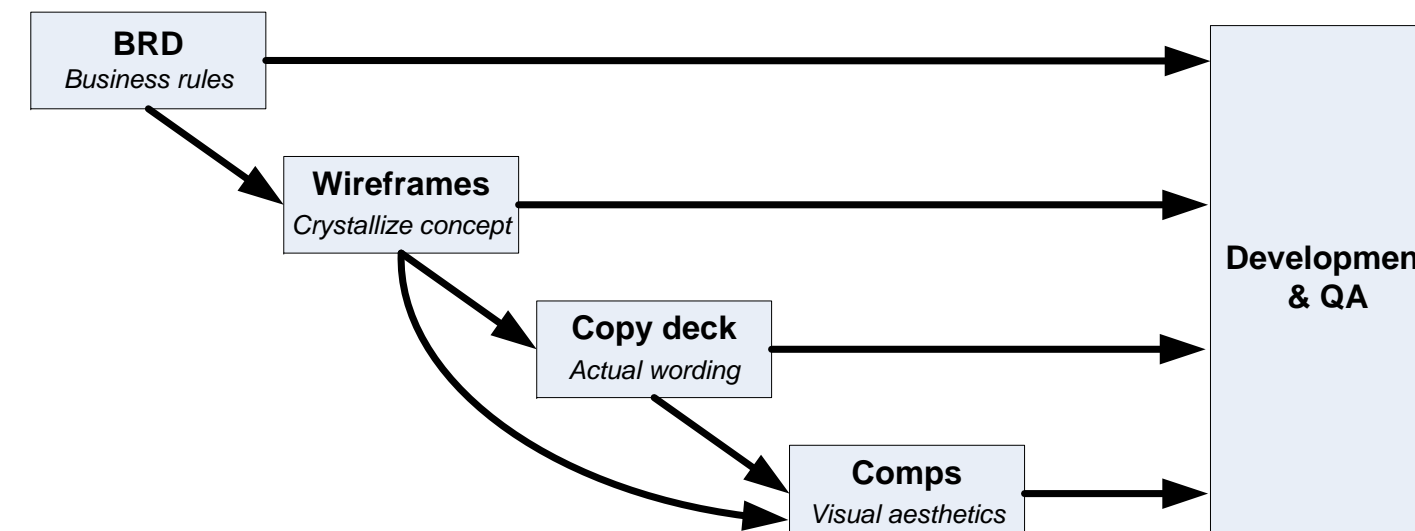
The wording of page titles, heads, and instructions is often intrinsic to the design. Body copy usually is not. Provisional placeholder wording is usually indicated by the presence of nonsense wording such as "lorem ipsum" and/or by enclosing the text between < and >.

That said, actual final wording comes from the copy deck.

One of Four Documents

Except on the smallest projects, there are typically four documents that work together to spell out the plan for the site:

- BRD** The Business Requirements Document spells out the business stakeholders' objectives and business rules. It is typically written by the functional lead, project manager, and/or other business stakeholder.
- Wireframes** The wireframes express the vision for how to bridge what the business stakeholders want to accomplish and what end users need. This document is created by an interaction designer in User Experience. Some other companies call these schematics.
- Copy deck** This gives the actual wording to use for page titles, headlines, body copy, etc., keyed to the wireframes. It is written by a writer/editor in User Experience.
- Comps** Short for "comprehensive," the comps convey the visual design: art, colors, type treatment, and sizes, placement, and spacing of the elements, etc. There is typically one comp for each page type.



Why multiple documents?

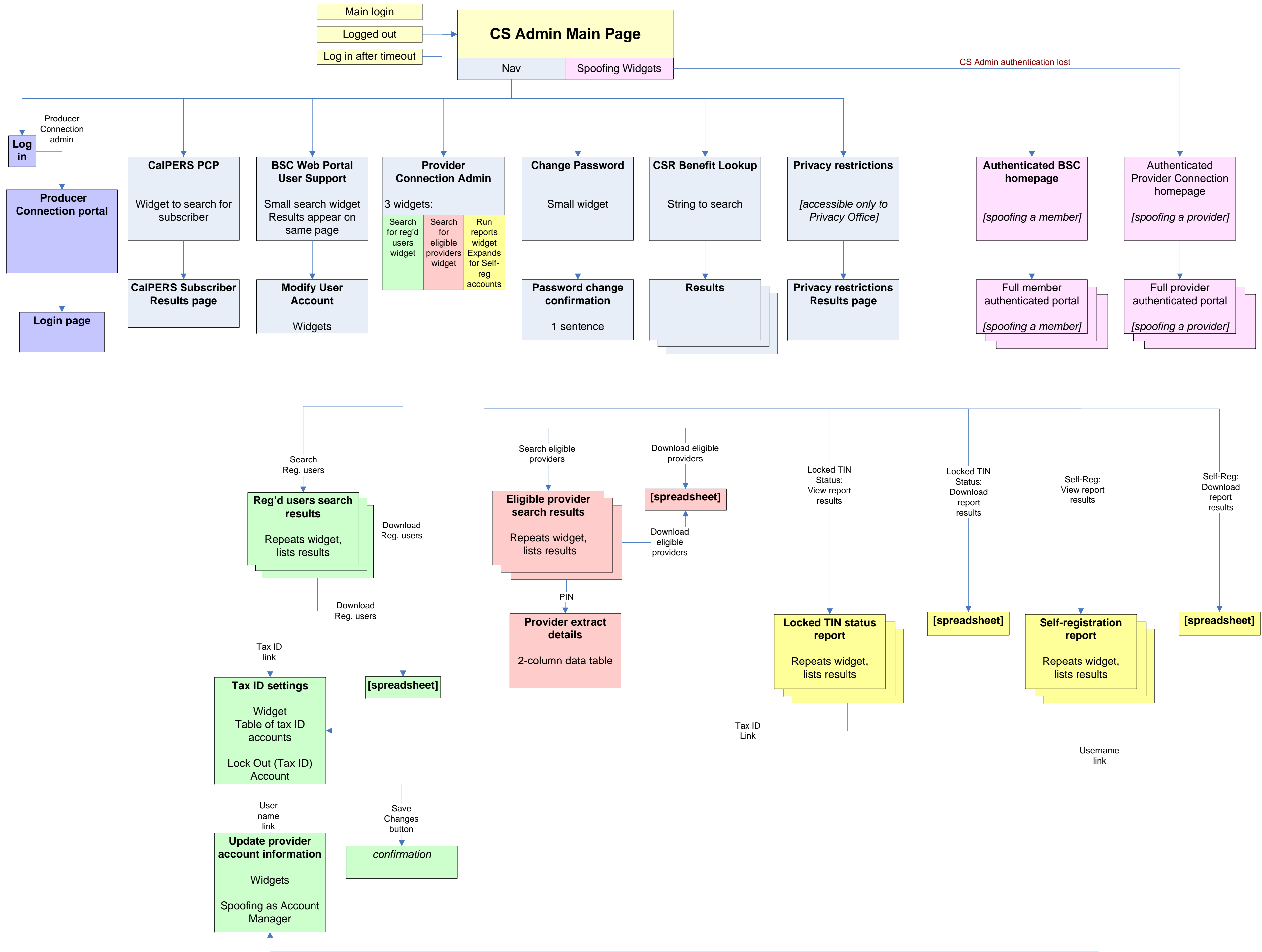
The BRD is the basis for the wireframes, and the wireframes are the basis for the copy deck and the comps. But the wireframes are not a substitute for any of those other documents.

Iterations: The reason is that each document serves its own special purpose. Each is produced by a specialist who can bring the proper attention and expertise to their aspect of the project. On most projects, everything is iterative: Business rules change up to last minute, copy gets revised every time it's looked at, and visual design gets polished and repolished.

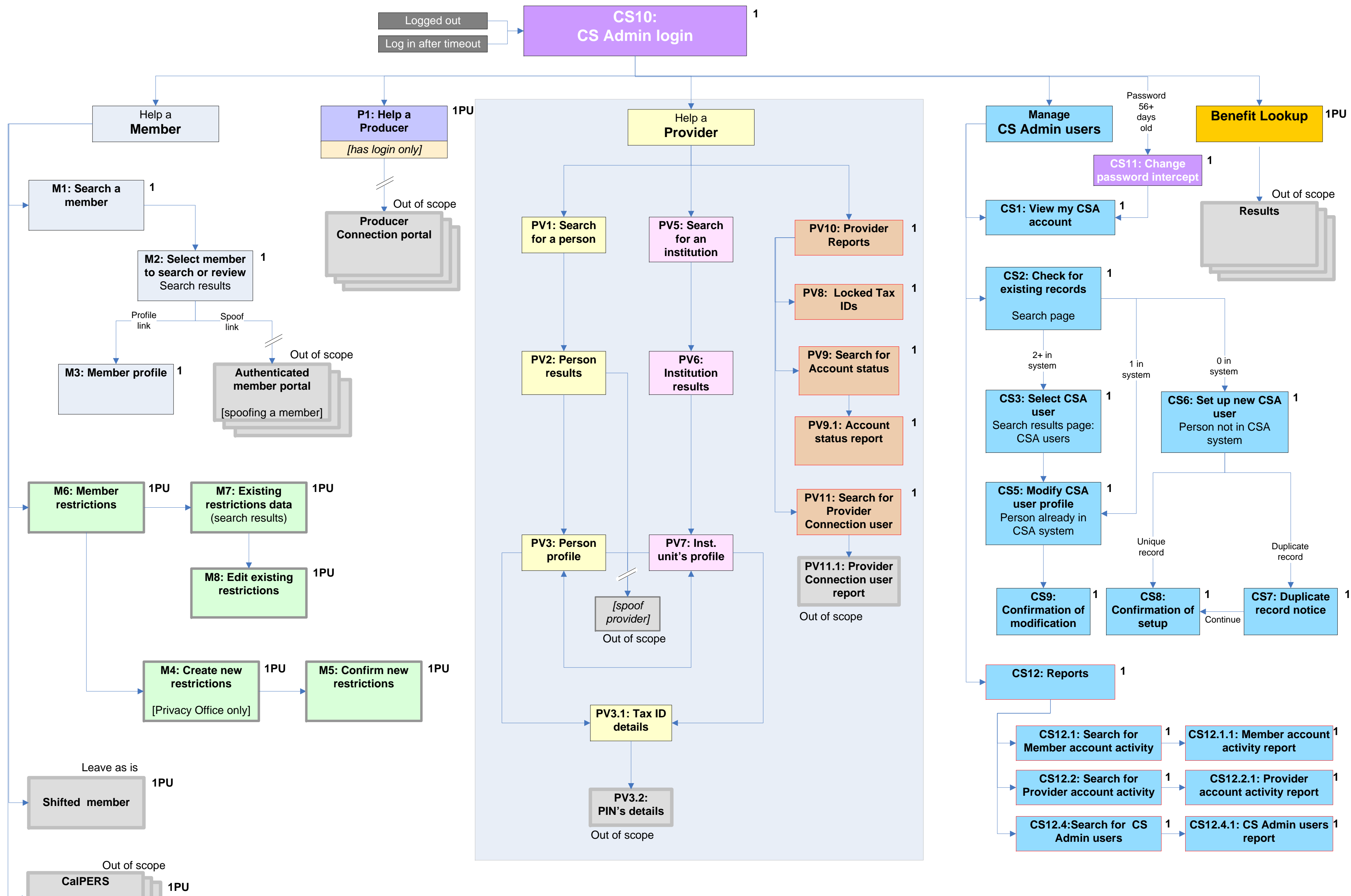
If the wireframes tried to reflect all of those changes, each change would have to be documented twice, the wireframes would never be finished, and projects would be delayed.

Quality & schedule: So while the multi-document approach may seem inconvenient, it makes for a higher-quality end product and a higher likelihood of meeting the schedule.

CS Admin status quo (for reference only)



CS Admin new site map



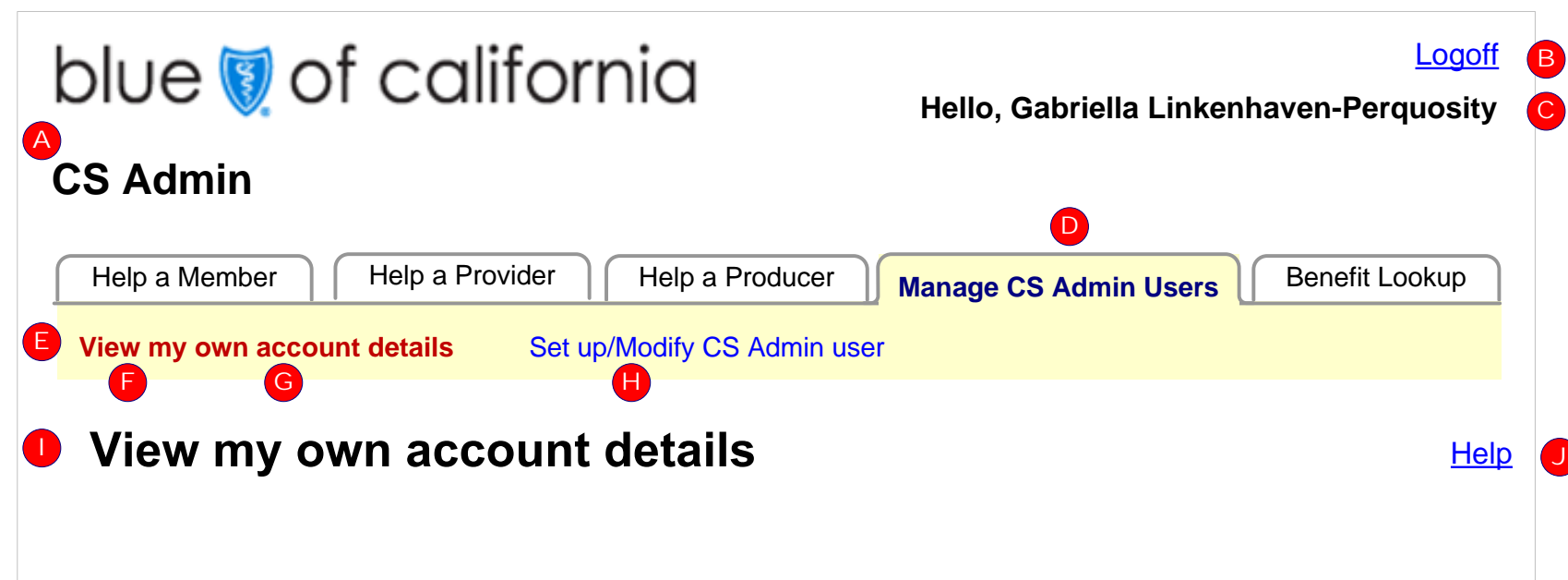
M = Member
 PV = Provider
 D = Producer
 CS = CS admin user
 1 = in Phase 1
 1PU = a pickup in Phase 1

// Depart CS Admin; new browser window

[Red Box] Revision since phase 1 doc
 [Grey Box] Out of scope

Global elements: Top-of-page elements and tabs

Top-of-page elements



Description:

An earlier draft of this page appeared in the wireframes document for Phase 1. Differences from the draft are highlighted in red.

This page describes elements that appear in multiple screens.

There is no global footer.

Each time a rep begins a session, CS Admin opens to whichever tab that rep had open most recently, no matter how far in the past their most recent session occurred.

The width of the subtab color area and of the horizontal line separating the tabs from the subtab area varies according to the width of the content of the individual page.

Specifications:

- A** "CS Admin" identifies the tool the rep is using, but is never the page title.
- B** The Logoff link appears on every page except the login page.
Link text: Logoff
Effect: Logs the rep off of this CS Admin session and presents the login screen.
On pages where the contents are wider than the tabs, the "Logoff" link and the greeting "Hello, [rep's name]" move to the right to the flush right with the rightmost edge of the contents.
- C** After the word "Hello," present the rep's full name. This element appears on every page except the login page.
On pages where the contents are wider than the tabs, the "Logoff" link and the greeting "Hello, [rep's name]" move to the right to the flush right with the rightmost edge of the contents.
- D** The currently active tab is highlighted both typographically and with background color
- E** Links on this line are called subtabs. Not all tabs have subtabs. Those that do have subtabs (e.g., Help a Member) use the same background color in the subtabs area as on the tab itself. Those that do not have subtabs (e.g., Help a Producer), have no background color in the subtabs area.
- F** Each tab's default subtab (if it has subtabs at all) is in the leftmost position.
- G** The currently active subtab (if the tap has any subtabs at all) is highlighted typographically.
- H** Each subtab is a link leads to that subtab page.
- I** Page title will vary from page to page.
- J** Not all pages will have Help. But this wireframe offers a placeholder for a Help link for whichever pages do have it.
Link text: Help
Effect: Spawn small pop-up window containing concise instructions pertinent to this page.

The "Help" link is always level with the page title and flush right with last tab. Unlike the "Logoff" link and the greeting "Hello, [rep's name]," the "Help" link does not move according to the width of the contents. Reason: Though the link is global in many senses, the content that it invokes is context-sensitive to the page it is on; so it should not run the risk of requiring horizontal scrolling to see in some cases.

K On pages where the contents are wider than the tabs, the horizontal line beneath the tabs and at the subtab color area (if any) stretch as far as necessary to the right to match the width of the contents. The "Logoff" link and the greeting "Hello, [rep's name]" move to the right. Note that the tabs themselves do not stretch or shift location.

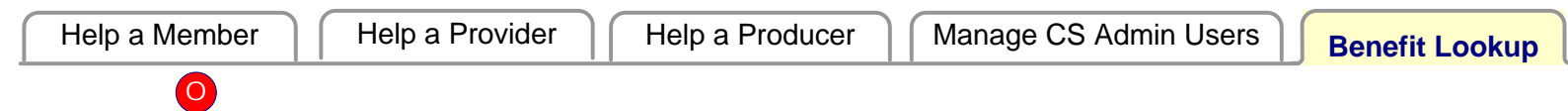
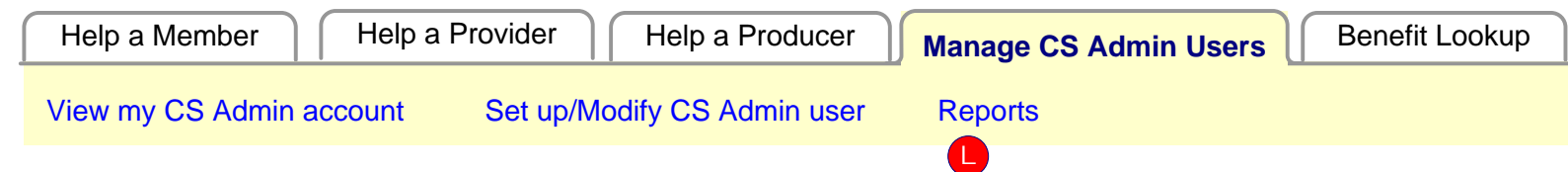
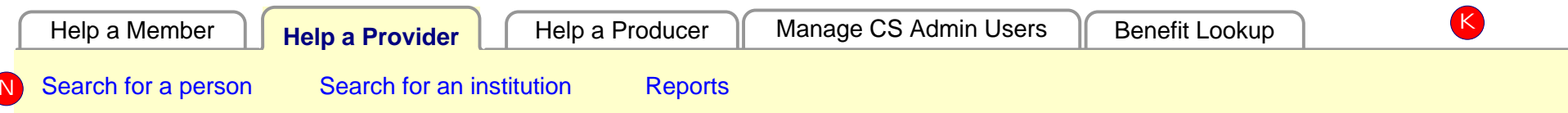
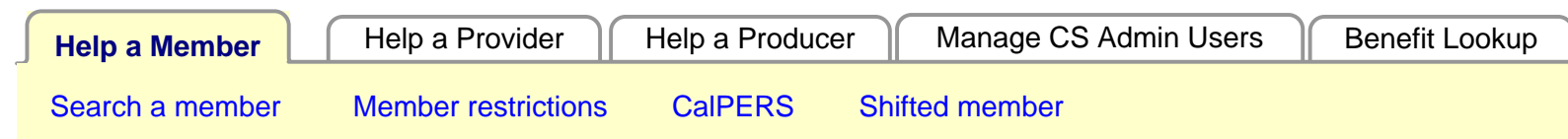
L The subtabs of Manage CS Admin Users have changed since Phase 1.

M The login page state is the default tab state when the user first arrives at CS Admin to login.

N A "Search by user ID" subtab was added at the last minute before Phase 1 launched. It is now being removed.

O Tabs have been removed from the Benefit Lookup tab

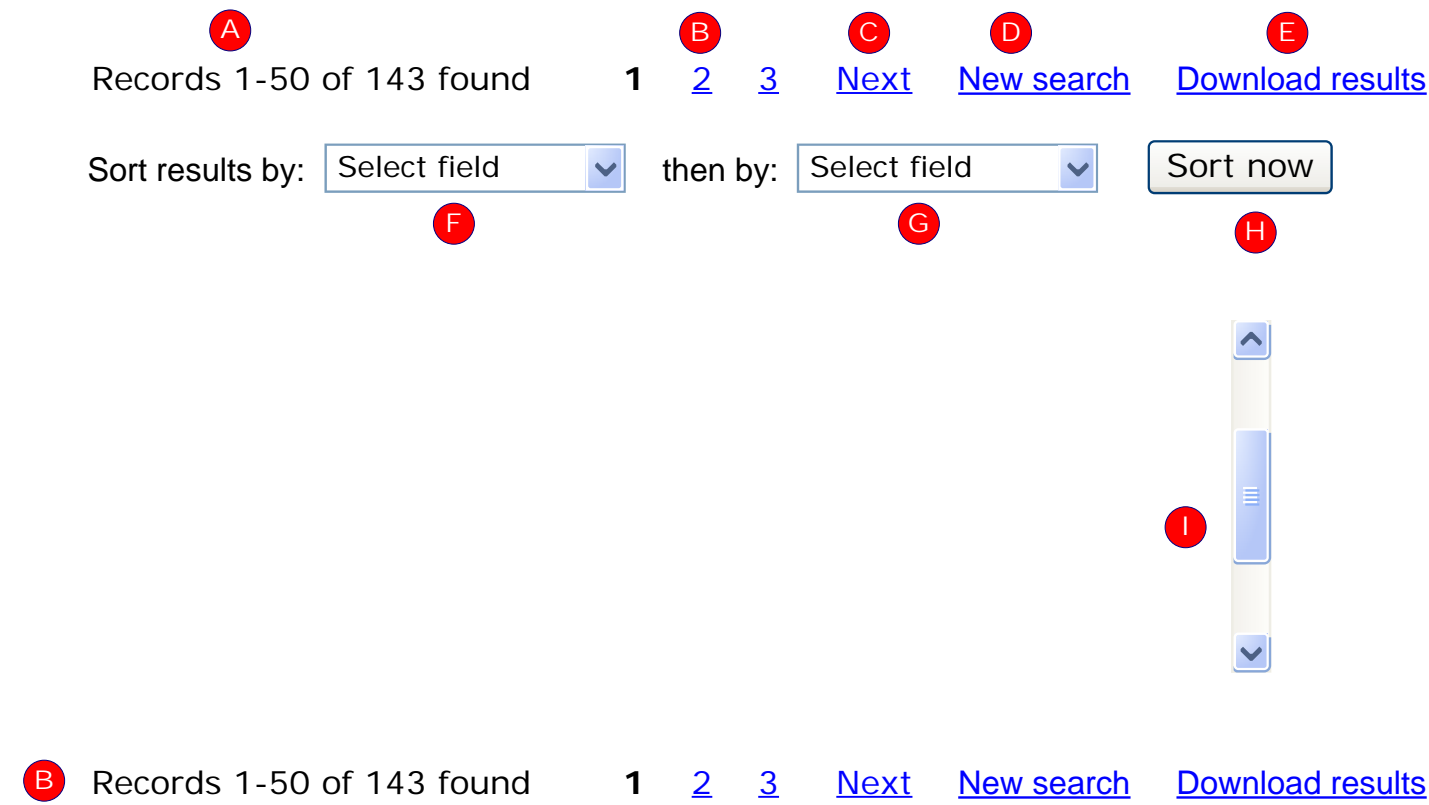
Tabs



Login page state:



Global elements: Search results elements



Description:

- This is a copy of a page that appeared in the wireframes document for Phase 1. It is repeated here for convenience only. This differs from its counterpart in the Phase 1 document only in that
- this version includes the "Sort now" button, which was decided on only long after the Phase 1 document was finished
 - The following paragraph about duplicate search results is added.

One of the single biggest problems with the old CS Admin was that reps were commonly inundated with hundreds or thousands of search results, a high percentage of which were duplicates. This duplication made search results unmanageable and often useless. So we are now eliminating all duplicate listings in search results (including duplicate listings that differ only in such trivia as capitalization).

This is a continuation of the preceding page describing elements that appear in multiple screens. This page is about elements in search results.

Specifications:

A Regardless of how many records are found, we offer a maximum of 50 records per screenful. No functionality is offered to change that quantity. Each set of search results includes a statement of the total number of records found and how many results are shown on the current page. Records are numbered 1-*n*. This document will use the example of 143 records found, broken into units of a maximum of 50 records per page. The makeup of the statement is:

Records [first record's number on this page] [hpyhen, if more than one record] [last record's number on this page] of [total number of records found] found

B Anytime there are more results than will fit on one page (i.e., 50), the system adds at both the top and the bottom of the listing a collection of links in the following form:

[1](#) [2](#) [3](#) [Next](#)

Each screenful of up to 50 search results is numbered 1-*n*. That collection of page numbers appears in the form shown here.

- The page number of the current screenful (1 in this example) is bold plain black text, not a link.
- Each page number other than the current page's is a link in underlined blue type. Clicking any page number leads to the screenful of results that it represents.

If there is only one screenful of results, these page numbers do not appear.

Once the user has proceeded to any screenful of results following the first, the collection of links is in this form:

[Prior](#) [1](#) [2](#) [3](#) [Next](#)

On the page containing the final batch of links, the option "Next" is omitted:

[Prior](#) [1](#) [2](#) [3](#)

C The "Next" Link appears only if:

- there is more than one screenful of results and
- the rep is not currently on the last screenful of results in the sequence.

Link text: Next

Effect: Leads to the next screenful of search results in the sequence

D **Link text:** New search

Effect: Leads back to the same search page in its default state that the rep just came from. (Which search page this is will vary depending on the context-- e.g., member, provider, rep, etc.. But this is the form in which the element will appear.)

E Some search results include a link to download the results. Clicking that link launches a standard download procedure like we have currently, to download the current search results.

E **Listboxes:** Search results appear in table form. Most results tables are sortable via a pair of listboxes. This gives reps much more control than sorting tables by a single column heading would give them.

Each listbox has a listing for each column heading in the table (except that tables with an Action column are never sortable by Action). "Select field" is always the default state of both listboxes.

Sequence: Unless noted differently in a specific case, the default sort sequence of results is by last name, then by first name. When alphabetizing search results, ignore capitalization. (Currently, the system will list GENIFER before Adam.)

Column heads: The column head by which the table is currently sorted (first sort criterion) is highlighted, but search results tables are not sortable by clicking the column headings themselves..

Memory: The system remembers the rep's most recent sort, so results are still sorted the same way if the rep comes back to this page after having gone somewhere else (i.e., the rep's work is not lost).

All records: Note that a re-sort applies to all found records, not just to the ones shown on the current screenful of results.

G There are a few cases of search results tables that, because of their simplicity and likelihood of a small number of results, offer only a single listbox for sorting.

H **Button text:** Sort now

Effect: Re- sort the search results by the criteria specified in the listboxes to the left.

I If there are enough listings in the table to require scrolling (exact number TBD), then a vertical scrollbar appears at the right edge of the results listings. The scrollbar applies only to the listings themselves, not the column headers, so the column headers are always visible as the rep scrolls up and down through the results,

Special color treatment in search results

Hard to spot repetitions

946 03 6494
 946 03 6494
 946 03 6494
 946 03 6567
 946 03 6568
 946 03 6568
 946 03 6573

Easy to spot repetitions

946 03 6494
 946 03 6494
 946 03 6494
 946 03 6567
 946 03 6568
 946 03 6568
 946 03 6573

Description

The provider database includes vast amounts of repetitive information, such as duplicate records and single Tax IDs that have many PINs associated with them. This design calls for not showing duplicate records at all, so the search results would never repeat any unique combination of a Tax ID and a PIN. But there will be lots of instances when a single TIN is associated with multiple PINs.

Currently, reps looking through search results must inspect them carefully to detect repetitions. This is needlessly time-consuming, inaccurate, and fatiguing. This design calls for having the system do what it can do much more efficiently than humans can: spotlighting repetitions. We will use color to highlight those repetitions.

Wireframes in this document will refer to this "special color treatment" for columns of data that will use it. If a specific wireframe does not call for this special color treatment for a specific column(s), then it is not used that specific context. This color treatment of the type will apply most commonly to the Tax ID and the PIN columns.

Typographical treatment of Tax IDs (Tax ID Numbers) and PINs

If 2 or more consecutive items in the same column (such as Tax IDs or PINs) are identical, they appear in colored type. Any number that is not directly above or below an identical number appears in black type. This treatment is intended to make it easier for reps to spot repetitions and recognize them as sets.

There is a rotating sequence of 6-8 colors of type, so that any two adjacent sets of numbers are distinguishable as different sets.

search results link color palette



This is not color-coding. No color has any special meaning (i.e., green does not mean anything different from purple). Each color just highlights a different group of matching numbers.

Note that resorting the table may change the sequence of items in their columns, so items that were adjacent a moment ago are no longer adjacent. The coloring of the sets of numbers applies only to the sort currently in effect and does not carry over from one sort to another.

If the item is clickable, it is underlined when the rep mouses over it, to indicate that it is clickable.

PV1: Search for a person

blue of california [Log off](#)

Hello, Gabriella Linkenhaven-Perquosity

CS Admin

Help a Member **Help a Provider** Help a Producer Manage CS Admin Users Benefit Lookup

Search for a person Search for an institution Reports

Search for a person [Help](#)

Use this tool to search for users' accounts to resolve issues related to logging in, password changes and updates. You may "spoo" the users' (or their account manager here.) If the only information you have to search by is Institution, [Search for an institution](#).

Account type: All types User Account manager

Tax ID:

PIN:

User ID:

Person first name:

Person last name:

Institution name:

Provider type:

Type of business:

Account status: All Approval required Approval denied Registered Must reregister Disabled Pending

Description

The main purpose of this page is to help reps identify individuals to spoof. This is the default page that automatically appears when the "Help a Provider" tab is first opened. It appears also whenever the rep clicks the "Search a person" subtab.

Anytime the rep comes to this page, all fields are automatically cleared of whatever entries they may have made the last time they were there.

Notable changes from current functionality

- We are eliminating the current widget for searching for an eligible provider. Instead, unregistered providers will be indicated by an icon in the results.
- PIN is currently case-sensitive. It should not be. In fact, nothing should be case sensitive.
- PINs are 14 alphanumeric characters. But the first five characters of a complete PIN are useless for reps' purposes. So, as an efficiency, the rep may enter only the last 9 characters. System should pay attention only to the last 9 characters of the PIN, so it would accept an otherwise valid PIN whether the rep enters those first five characters or not.

Specifications

A Link text: Search for an institution

Effect: Loads Search an institution page PV4

B [omitted]

C The account type field defaults to the All types radio button.

D [omitted]

E PIN is no longer case-sensitive. The rep may or may not enter all 14 characters of a PIN. System ignores anything but the last 9 characters of the PIN, so it would accept an otherwise valid PIN whether the rep enters those first 5 characters or not. Ignore any spaces or punctuation the the rep may type in a PIN when searching.

F Searches are not case-sensitive by any field

G If the rep clicks Any, the system automatically checks all of the other Account status checkboxes, without reloading the page. If the rep unselects one ore more individual checkboxes, the system will uncheck the "All" box . If the rep unselects "All," the system automatically unselects all the other Account status checkboxes.

"All" is the default on initial load of this page and the system will automatically check all Check boxes.

H Button text: Search [highlighted as default button]

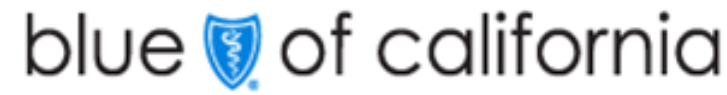
Effect: Loads individual search results page, EVA. NOTE: Pressing Enter has the same effect as clicking the Search button.

Only one single entry is required to conduct a search. The more entries the rep makes, the more focused the results will be.

I Button text: Clear form

Effect: clears all rep entries from all fields

PV2 Provider: Person Search Results



[Log off](#)

Hello, Gabriella Linkenhaven-Perquosity

CS Admin

[Help a Member](#)
[Help a Provider](#)
[Help a Producer](#)
[Manage CS Admin Users](#)
[Benefit Lookup](#)

[Search for a person](#)
[Search for an institution](#)
[Reports](#)

Search results: Select the person you need

[Help](#)

Click "Spoof" to mimic the user experience on Provider Connection, or "Profile" to update the person's account or reset a password. [New search](#)

Records 1-50 of 143 found [1](#) [2](#) [3](#) [Next](#) [New search](#) [Download results](#)

Sort results first by: Then by:

Person's name	User ID	Tax ID	Account type	Account status		PIN	institution name
Miller, Ann	nurseAnn	94 6036777	User		Spoof	Profile	XXXX 123AB Lorem ipsum long name long nameus
Miller, Ann Marie	Loremipsum	94 6036494	User		Spoof	Profile	HOSP 006YN Lorem ipsum long name long nameus
Miller, Anna Marie	Loremipsum	94 6036494	User		Spoof	Profile	HOSP 006YN Lorem ipsum long name long nameus
Miller, Anna Marie	Loremipsum	94 6036494	Acct Mgr		Spoof	Profile	HOSP 006YN PRAKASH NARAIN,MD
Miller, Bruno	Loremip2345	94 6036567	User		Spoof	Profile	HOSP 123YN Bakersfield Family Medical Center
Miller, Chris	chrisMill999	94 6036568	User		Spoof	Profile	HOSP 921YN Christopher B. Miller,M.D.
Miller, Chris	Loremip2345	94 6036568	User		Spoof	Profile	HOSP 935YN Howard C Miller, DPM
MILLER, CHRIS	Lorem23baker	94 6036573	User		Spoof	Profile	HOSP 876YN Howard C Miller, DPM
Miller, Chris	Sandyeggo	94 6036789	Acct Mgr		Spoof	Profile	HOSP 415YN San Diego Ear Head & Neck Surge
Miller, Chriss	howdyDoody	94 6036790	User		Spoof	Profile	HOSP 757YN PRAKASH NARAIN,MD
Miller, Christine	chrisChris	94 6036888	Acct Mgr		Spoof	Profile	HOSP 456YN Christine Miller,DPM
Miller, Christine	chrisChris	94 6036889	Acct Mgr		Spoof	Profile	HOSP 456YN Christine Miller,DPM
Miller, Cris	millCrisAal	94 6036890	User		Spoof	Profile	HOSP 523YN Lorem ipsum long name long nameus
Miller, Desdemona	23liveOne	94 6036988	User		Spoof	Profile	HOSP 873YN Lorem ipsum long name long nameus

Miller-Periwinkle, Dave	Loremip212	94 6076544	User		Spoof	Profile	HOSP 023YN Lorem ipsum long name long nameus
Miller-Stevens, Sally	Loremip7623	94 6037655	User		Spoof	Profile	HOSP 421YN Lorem ipsum long name long nameus
Millerby, Albert	Loremip645	94 6037656	User		Spoof	Profile	HOSP 335YN Lorem ipsum long name long nameus
Millerton, Richard	Loremip2399	94 6037657	Acct Mgr		Spoof	Profile	HOSP 276YN Lorem ipsum long name long nameus
Adams-Miller, Roger	Lorlpsum	94 6037658	User		Spoof	Profile	HOSP 345YN Lorem ipsum long name long nameus
Carlson Miller, Andrea	Lorlips234535	94 6037659	Acct Mgr		Spoof	Profile	HOSP 242YN Lorem ipsum long name long nameus
Spoonmiller, Carl	XCVeritas	94 6037660	User		Spoof	Profile	HOSP 846YN Lorem ipsum long name long nameus

Account status symbols: Approval required Approval denied Must reregister Disabled
 User's Provider Connection password has expired

Records 1-50 of 143 found [1](#) [2](#) [3](#) [Next](#) [Top of page](#) [New search](#) [Download results](#)

Description

This page gives the results from the Search for a User Account page, PV1. See discussion of standard search results elements at beginning of this document.

We want to eliminate duplicate listings in the search results.

Specifications

A [NEW 6-18-09] Do not repeat search widgets at the top of the page. Instead, offer "New search" link that reloads PV1 Search for a person page, populated with the entries the user made last time they were on it. Note that the intro has been revised due to the removal of the search widget.

B [NEW 6-18-09] This mockup shows duplicate entries (same user ID, but different Tax ID). Prevent such duplicate entries. Reps will be able to see a user's various tax IDs on your profile page.

C The column header by which the table is currently sorted first is highlighted. The default sort is by Person's name. The second sort level is by User ID, alphabetically. In both cases, ignore capitalization. The third sort level is by Tax ID.

D This table uses the same typographical color treatment as described on the "Color" page (15), except that in this table the color treatment applies only to the following columns: Person's name, User ID, Tax ID, PIN, and Provider name.

All user IDs, Tax IDs, and PINs listed in Individual results are clickable, regardless of the colors of their type. They are underlined on mouseover. With the User ID column and the PIN column, any instances of identical adjacent listings are highlighted in colored type. Use the same color of type in the two columns when the multiple listings are for the same person (e.g., in this wireframe example, user ID Loremipsum and PIN HOSP 006UN are for the same person, so they have the same color of type in both columns). But different sets of repetitions within either column get different colors of type.

E **Link text:** [user ID] (underlined on mouseover)
Effect: Leads to that person's individual profile page

F PIN column appears only if PIN was a search criterion.
Link text: [PIN] (underlined on mouseover)
Effect: leads to PIN Detail page (PV3.2)

G "Account Status" column contains only icons representing various account statuses. Any given listing may have 1 icon or no icon. No listing would have more than one icon. Show icons for the following anomalies:

- Approval required
- Approval denied
- Registered
- Must re-register
- Disabled
- Pending

The placeholder icons shown are for illustration purposes only. Actual art TBD. Mousing over any icon brings up a Tool Tip defining what the icon stands for.

HOSP 023YN	User	Spoof
HOSP 421YN	User	Spoof
HOSP 335YN	Acct Mgr	= Approval required Spoof

Only the icons that are actually used on the current page are shown in the key below listings.

H **Link text:** Spoof
Effect: Clicking Spoof launches a spoofing session for that individual.

I **Link text:** Profile
Effect: leads to that person's individual Profile page (PV3x). The Profile page will load in the same window.

J **Link text:** [Tax ID] (underlined on mouseover)
Effect: Load the Tax ID Detail Page PV3.1

K The name displayed as the one the user registered with. Truncate any institution name longer than 35 characters.

- L** Last-name hits are grouped under the following groups and in the following sequence:
- Exact matches
 - Compound last names that begin with the search string
 - Non-compound last names that begin with the search string
 - Compound last names that include the search string in any position other than the beginning
 - Non-compound last names that include the search string in any position other than the beginning

Each group is separated from each other group by a horizontal line. If any group has no listings, that group is omitted and its space closed up.

M If the person's Provider Connection password has expired, an indicator appears next to their name. Mousing over it brings up a ToolTip explanation:

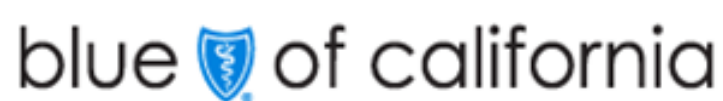
= User's Provider Connection password has expired

Carlson Miller, Andrea

N The various "Account status" symbols indicating status are explained by the key at the bottom of the results table. Include only symbols actually used in this particular set of search results. List of Account Status Symbols:


- Approval required
- Approval denied
- Registered
- Must reregister
- Disabled
- Pending

O Ignore capitalization in sequencing results.



AUTHOR	TITLE	FILENAME	CREATE DATE	REVISED	PAGE
John Boykin	CS Admin, Phase 2	CSadminWires.vsd	8/28/2007	11/8/2009	9 OF 25

PV3a: Provider: Person's profile (user)


[Log off](#)

Hello, Gabriella Linkenhaven-Perquosity

CS Admin

Help a Member
Help a Provider
Help a Producer
Manage CS Admin Users
Benefit Lookup

Search for a person
Search for an institution
Reports

A Jasper Miller's Profile [Help](#)

B [Spoof Jasper Miller](#) **C** [Return to search results](#) **G** [New search](#)

* Required fields

Tax ID: **R**

* User ID:

* First name:

* Last name:

* Institution: **F**

* Address:

* City:

* State: **K**

* ZIP:

D

* Phone 1: **S** Ext:

Phone 2: Ext:

Email:

Account type: User Account manager

Account manager: **Q** [Spoof](#) **H** [Profile](#)

Provider type:

Type of business: **E**

Account status:

Latest login: 2007-04-27

Date registered: 2006-03-18

Claims access: Yes No

Notes: **T** **N**

L

M Tax IDs associated with user Jasper Miller

Below are the Tax IDs that the user has registered with. Clicking on a Tax ID will display TIN details.

J Tax ID locked

Tax ID					
94 6036494	94 6036567	94 6036575	94 6036578	94 6036581	94 6036584
I 94 6036495	94 6036573	94 6036576	94 6036579	94 6036582	
J <input type="checkbox"/> 94 6036496	94 6036574	94 6036577	94 6036580	94 6036583	

O Profile last updated on 9/26/07 by:
Priscilla Higginbotham

Changes: Email, user status

Notes:

[View history of this profile](#)

P [Top of page](#)

Description
This page presents profile info for a specific person who has registered on behalf of a provider's institution. The page is reached by clicking a Profile link in the Search for a person results, PV2. See PV3b, Account manager's profile, for comparison.
Any given person may have multiple accounts and affiliations. There is no one full record of all of any person's accounts and affiliations. The top section of this page gives information about only one Tax ID associated with that person, according to the link the rep clicked to come to this page; any and all additional Tax IDs associated with this person appear lower on the page.
Each field is populated with the information (if any) that we currently have on record. Any field that has no value on record (for example, a second phone number) is left blank.
Only certain fields are editable on this page. Other fields are editable only by spoofing the person and making changes within the Provider Connection. Any field whose value is not shown in a text entry box or listbox or associated with a radio button or checkbox on this wireframe is not editable here (Tax ID, institutions, Account manager, Latest login, Date registered).

Specifications

A This user's name is part of the page title: [user's name]'s Profile.

B **Link text:** Spoof [this person's name]
Effect: Launches a spoofing session as that person in a new browser window

C **Link text:** Return to search results
Effect: Returns the rep to the same set of search results that brought them here.

D **Button text:** Change password
Effect: As soon as the rep clicks this button, system changes this member's password to "password" and presents the following message in conspicuous type directly adjacent to the button:

Password has been changed to: Password
Tell user to change password after first use.

NOTE: This password reset functionality is the same as specified for members.

E See BRD for list of options offered in Provider Type, Type of Business and Account status listboxes. Account status options are currently: Any, Approval required, Approval denied, Registered, Must register, Disabled, Pending.

F Name of institution [the name Jasper entered when he registered]

G **Link text:** New search
Effect: Loads page PV 1: Search for a person, with all prior entries cleared

H [NEW 6-18-09] **Link text:** Profile [Remove the link from the account manager's name]
Effect: Leads to that account manager's individual record (PV3b).
NOTE: If this person does not have an account manager on record, show "None on record" (not a link) and eliminate the "Spoof" and "Profile" links.

I **Link text:** [any Tax ID]
Effect: Loads the Tax ID details page (PV3.1), which lists all of the PINs associated with that selected Tax ID (not just the Tax IDs associated with this user).
Note that this table combines the tax IDs and PINs that are associated with this particular person, whereas other contexts show Tax IDs and PINs that are associated with a particular institution.
The table defaults to sort by Tax ID. Tax ID's are listed in numerical order. [NEW 6-18-09] If there are 5 or more tax IDs to be listed, break the list into columns as shown here. In such cases, no column but the last one should have fewer than 3 entries. None should have more than 5. Have as many columns as needed up to the width of the page.
If there are more Tax IDs that will fit even with this treatment, then offer a link "Show all tax IDs associated with [user's name]". Clicking that link would load a page that consists only of the same header and intro used here, along with a complete list of all tax IDs. A link "Return to profile" on that page would lead back to this profile page. (This replaces the 1 2 3 Next functionality that we had before.)
Move the " Tax ID locked" line to the new location shown here.

J Any Tax ID that is locked has a lock icon beside it, as described in the context of page PV7, Tax ID Detail (continued) page. Note that functionality to lock tax IDs is not offered in the context of a person's profile.

K State, Registration status, and Business type are the only listboxes on this page. All other editable fields here are free text entry boxes.

L **Button text:** Submit changes
Effect: System implements any profile changes the rep made here and reloads this page with the new information populated. Fields indicated with * must have an entry in order for changes to be submitted. An appropriate error message is displayed in the standard way if:

- any required field is blank when the rep clicks the "Submit changes" button
- the button was clicked without any changes having been entered

Note that this button is highlighted as the default selection, and pressing the Enter key has the same effect as clicking this button.

M This section lists all Tax IDs that this user has registered with. This section appears only if this user is in fact associated with more than one Tax ID. After the words "All Tax IDs associated with" insert the account type (user or account manager) and then the person's name. **Note that some users are associated with 400+ Tax IDs. We show a maximum of 50 at a time.**

N The message "<500 characters maximum>" appears in gray type and disappears as soon as the Notes box receives focus. **NOTE: In the current build, the type is not disappearing on focus as specced. If for some reason we cannot make it disappear as specced, then move the message to immediately below the text entry box.**

O History box works exactly the same way here on as described on page M3 Member account (phase 1; see explanation there). **Note that every page that has a history box has a "Top of page" anchor link directly below the history box.**

P **Link text:** Top of page
Effect: Anchor link, displays top of current page.

Q **Link text:** Spoof
Effect: Launches spoofing session of this account manager in a new browser window
On mouseover, show ToolTip saying, in effect "You will be spoofing as this person's account manager." If this person does not have an account manager on record, the "Spoof" link is omitted.


R If the tax id is locked, then the "locked" icon () should show.

S Phone and extension is existing functionality and should work as it currently does in production

T [NEW 6-18-09] Notes is no longer a required field.

AUTHOR	TITLE
John Boykin	CS Admin, Phase 2

PV3b: Provider: Person's profile (account manager)


[Log off](#)

Hello, Gabriella Linkenhaven-Perquosity

CS Admin

Help a Member
Help a Provider
Help a Producer
Manage CS Admin Users
Benefit Lookup

[Search for a person](#) [Search for provider record](#) [Reports](#)

Mary-Louise Higgenbotham's Profile [Help](#)

[Spoof Mary-Louise Higginbotham](#)
[Change password](#) A
[Return to search results](#)
[New search](#)

* Required fields

Tax ID: 94 6036567 [View all Tax IDs](#) B

* User ID:

* First name:

* Last name:

* Institution:

* Address:

* City:

* State:

K * ZIP:

* Phone 1: Ext:

Phone 2: Ext:

Email:

Account type: D

Provider type:

Type of business:

Account status:

Latest login: 2007-04-27

Date registered: 2006-03-18

Claims access: Yes No

Notes:

Tax IDs associated with account manager Mary-Louise Higgenbotham F

Click on a Tax ID to see TIN details.

🔒 Tax ID locked

Tax ID					
94 6036494	94 6036567	94 6036575	94 6036578	94 6036581	94 6036584
94 6036495	94 6036573	94 6036576	94 6036579	94 6036582	
🔒 94 6036496	94 6036574	94 6036577	94 6036580	94 6036583	

E Users associated with account manager Mary-Louise Higginbotham for Tax ID 94 6036567

Click on a name to see that person's profile.

Include disabled accounts I

Adams, Rosemary (<user id>)	Allen, Lawrence (<user id>)	Armstrong, Laura (<user id>) L	Ayers, Susan (<user id>)
Baily, Barbara (<user id>)	Bergstrom, Bruce (<user id>)	Blackstone, Francis (<user id>)	Boorstein, Michael (<user id>)
Carter-Ipsum, Ralph (<user id>)	Celorem-Ipsum, Wendy (<user id>)	Cilorem-Ipsum, Oscar (<user id>)	Colorem-Ipsum, Jack (<user id>)

J [Has claims access](#)

PAGE CONTINUES

Description:

This version of the Person's profile page is for Managers. It is identical to the Persons profile (user) page (PV3a-- see notes there) except in the following ways:

- A** The procedure for changing an account manager's password is different than changing an ordinary user's, so here it is a link instead of a button.
Link text: Change password
Effect: Launches an ordinary spoofing session for this account manager, taking the rep directly to the page within Provider Connection where passwords may be changed: https://www.blueshieldca.com/provider/common/pass_1_17.jhtml
 Rep changes password there while spoofing this provider.
- B** Since there's potentially a lot more material that might appear on an account manager's profile page, this page includes an anchor link to the "All Tax IDs..." section:
Link text: View all Tax IDs
Effect: Jumps down to the "All Tax IDs and PINs associated with..." section on this same page
- C** As the page for account managers, this page eliminates the field for this person's account manager.
- D** Account type is not editable for account managers.
- E** This page includes a section identifying all users who are under this account manager. Clicking any user's name leads to that user's profile, PV3a. This section is very similar to the user section described on page PV7 Tax ID Detail (continued) page (see description there), except that:
 - Here there are no parenthetical numbers associating users with account managers, since all users listed here are associated with this account manager
 - This listing of users includes an icon indicating users who have claims access
 Display names according to the selections made in the radio buttons and checkbox directly above them.
- F** Whereas PV3a puts the word "user" before the person's name in subheads, this page puts "account manager" before the person's name.
- G** Include in the heading the tax ID that appears at the top of this profile.
- I** See explanation about disabled accounts on PV7, Tax ID Detail (continued) page.
- J** A symbol appears beside each of this account manager's users who have claims access. A footnote appears below the list of users explaining what that symbol means.
- K** [NEW 6-18-09] In any error situation anywhere in the site: If a problem with any field prompts an error message, highlight in bold red type (in addition to the error message).
- L** [NEW 6-18-09] We are now moving the list of users down below the list of Tax IDs. Also, note the format of the names: Last name, first name, (user ID). The current build has first name and last name in the wrong order. We are alphabetizing by last name. Immediately after the name comes the user ID in parentheses—user ID does NOT go in a separate column. Note that we are removing the link from the user ID. It is now plain black type.

Profile last updated on 9/16/07 by:

Priscilla Higginbotham


Changes: Email, user status

Notes: whatever copy goes here...

[View history of this profile](#)

[Top of page](#)

PV3.1 Tax ID details



[Log off](#)

Hello, Gabriella Linkenhaven-Perquosity

CS Admin

Help a Member
Help a Provider
Help a Producer
Manage CS Admin Users
Benefit Lookup

Search for a person
Search for an institution
Reports

Details of Tax ID  94 6036789

- B [Unlock Tax ID](#)
- C [Back to profile](#)
- F [Show all users](#)

I [Return to <type of search> Results](#) [Help](#)

Following are the Provider Identification Number(s) (PIN) associated with the selected Tax ID. Click on a PIN number to view detailed PIN data.

PIN	Provider name	Provider type
0572 98666	UC Davis Health Systems Longnameus	Non-invasive Lab/Img
D 0572 98667 E	UC Davis Health Systems Longnameus	Clinical laboratory
0572 98668	UC Davis Health Systems Longnameus	Hospitals
0572 98673	UC Davis Medical Center	Physician (MD or DO)
0572 98674	UC Davis Health Systems Longnameus	Multiple physician
0572 98675	UC Davis Health Systems Longnameus	Non-invasive Lab/Img
0572 98676	UC Davis Medical Center	Clinical laboratory
0572 98677	UC Davis Medical Center	Hospitals
0572 98678	UC Davis Health Systems Longnameus	Physician (MD or DO)
0572 98679	UC Davis Health Systems Longnameus	Multiple physician

G **Tax ID last updated on 09/23/2006 by:**

Priscilla Higginbotham

Changes: Unlock Tax ID

Notes: whatever copy goes here.

[View history of this Tax ID](#)

- H [Top of page](#)
- C [Back to profile](#)

Description:

This is a page rather than a pop-up, since it will often contain more information than would be appropriate for a pop-up. It is reached by clicking a Tax ID on

- a person's profile (PV3a or PV3b)
- PV7, Tax ID Detail (continued) page

Specifications:

- A** Whatever subtab was highlighted on the page the rep came from is highlighted again on this page.
- B** There are three possible states involving the Tax ID's lock status. What any given rep sees depends on both the status and that rep's authority level.

State 1 (Reps with security level XXX or higher, Tax ID not locked)

Details of Tax ID 94 6036789

- [Lock Tax ID](#)
- [Back to profile](#)
- [Show all users](#)

Clicking "Lock Tax ID" link spawns the Lock Tax ID box discussed in the context of the page PV7, Tax ID Detail (continued) page. After the rep successfully locks the Tax ID, the display changes (without reloading the entire page) to State 2.

State 2 (Reps with security level XXX or higher, Tax ID locked)

Details of Tax ID  94 6036789

- [Unlock Tax ID](#)
- [Back to profile](#)
- [Show all users](#)

Clicking "Unlock Tax ID" link spawns the Unlock Tax ID box discussed in the context of the page PV7, Tax ID Detail (continued) page. After the rep unlocks the Tax ID successfully, the display changes (without reloading the entire page) to State 1.

State 3 (Reps with lower security level, tax ID locked)

Details of Tax ID 94 6036789

- [Back to profile](#)
- [Show all users](#)

Note that in State 3, the "Lock/Unlock Tax ID" link is not available. The rep with a low security level will not see this link. See PV7, Tax ID Detail (continued) page, for a description of how both the locking and unlocking functions work.

- C** **Link text:** Back to profile
Effect: Returns to the profile page PV3x that the rep was just on.

This link will only be available if the user entered this page via PV2
- D** Clicking any PIN spawns the pop-up window PV3.2, PIN details with the details about that specific PIN.
[6-18-09] NOTE that PINs are supposed to be in numerical order from top to bottom, as shown. The current build has them in random order.
- E** This is CAPS data, so we display only one record per Tax ID.
- F** **Link text:** Show all users
Effect: Loads page PV7, Tax ID Detail (continued) page for the unit having this PIN. That page shows users who registered with this Tax ID.
- G** History box works exactly the same way here on as described on page M3 Member account. See explanation there. But note that on this page only, the box's heading is "Latest update of this Tax ID..." rather than "...of this profile..."
- H** **Link text:** Top of page
Effect: Anchor link, displays top of current page.
- I** **Link text:** "Return to User Account Search Results" or "Return to Provider Record Search Results"
Effect: Reloads provider record search results, PV6, or user account search results, PV2, page exactly as it was when rep was there just before coming to this page

The link title is dependant on the initial user task. If they were conducting a search on a User Account, the link would be "Return to User Account Search Results". If the user was conducting a Search for an institution, the link would be "Return to Provider Record Search Results."

AUTHOR	TITLE	FILENAME	CREATE DATE	REVISED	PAGE
John Boykin	CS Admin, Phase 2	CSadminWires.vsd	8/28/2007	11/8/2009	12 OF 25

PV4: Search for an institution

blue of california [Log off](#)
Hello, Gabriella Linkenhaven-Perquosity

CS Admin

Help a Member **Help a Provider** Help a Producer Manage CS Admin Users Benefit Lookup

[Search for a person](#) **Search for an institution** [Reports](#)

Search for an institution [Help](#)

Search BSC provider records using at least one criterion, such as PIN or Tax ID. If you already have information to identify a specific person associated with a provider within an institution, use [Search for a person](#).

A Tax ID: **E**

C PIN:

ZIP:

D Provider name:

You may search by up to 3 provider types.

Provider type(s):

F

H **I**


Description

The main purpose of this page is to help reps who only have Institutional search criteria start drilling down to identify an employee of that institution to spoof. This page appears when the rep clicks the "Search for an institution" subtab.

Specifications

- A Link text:** Search for a person
Effect: Loads Search a person page
- B** [omitted]
- C** Tax ID, PIN, ZIP, and Provider name are all free text entry fields.
- D** The provider name given here it is validated against the CAPS provider name on file.
- E** Each time the rep returns to this page, all fields are automatically cleared.
- F** Reps may search by 0-3 provider types. Because there are dozens of provider types – too many to list on the surface – we offer a set of 3 listboxes, each offering the same long list of provider types we have currently except that any provider type selected in any of the three listboxes is grayed out and unavailable in the other two. It does not matter which listbox(es) the rep uses or in what order.
Note that the default wording in each listbox is a little different.
- G** [omitted]
- H Button text:** Search [highlighted as default button]
Effect: System searches databases, presents results on Provider Record Results page, PV6. Only one single entry is required to to conduct a search. The more entries the rep makes, the more focused the results will be. Searches are not case-sensitive.
NOTE: Pressing Enter has the same effect as clicking the Search button.
- I Button text:** Clear form
Effect: clears all prior entries (including populated entries) from all fields

PV6: Institution Results


Log off

Hello, Gabriella Linkenhaven-Perquosity

CS Admin

Help a Member
Help a Provider
Help a Producer
Manage CS Admin Users
Benefit Lookup

Search for a person
Search for an institution
Reports

Search results: Select the institution Help

The criteria you search by is listed below, followed by search results. You also can edit any field to modify your search results.

A Tax ID:

PIN:

ZIP:

Institution:

You may search by up to 3 provider types.

Provider type:

Results

Records 1-50 of 143 found [1](#) [2](#) [3](#) [Next](#) [New search](#) [Download results](#)

Sort results first by: then by:

institution name	Tax ID	PIN	Provider type	Lock/Unlock Tax ID
B UC Davis Health Systems Longnameus	94 6036494	HOSP 006YN	Non-invasive Lab/Img	Lock Tax ID
UC Davis Health Systems Longnameus	94 6036495	HOSP 001YN	Clinical laboratory	Lock Tax ID
UC Davis Health Systems Longnameus	94 6036496	HOSP 002YN	Hospitals	Lock Tax ID D
UC Davis Health Systems Longnameus	94 6036567	HOSP 003YN	Physician (MD or DO)	Unlock Tax ID
UC Davis Health Systems Longnameus C	94 6036568	HOSP 004YN	Multiple physician	Lock Tax ID
UC Davis Health Systems Longnameus	94 6036569	HOSP 005YN	Non-invasive Lab/Img	Lock Tax ID
UC Davis Health Systems Longnameus	94 6036573 E	HOSP 008YN F	Clinical laboratory	Unlock Tax ID D

Tax ID locked

[1](#) [2](#) [3](#) [Next](#) [Top of page](#) [New search](#) [Download results](#)

Description

The rep gets these results if they searched with the Search for an institution subtab (PV4). See also the next page of this document for further discussion about this page.

It is fundamental to this redesign of CS Admin to exclude duplicate listings in search results. If more than one listing are the same, display only a single instance. If the rep searched by PIN and/or Tax ID, there would be only one record in the results.

Specifications:

A The Search for an institution PV4 search widget is repeated at the top of the results, with the criteria that the rep searched by populating the fields (in this instance, provider name UC Davis and business type provider). Search widget works here the same way described on page PV1, Search for a person (see specs there).

B Results for Provider Record searches present only CAPS Provider Data info, with a single result for any given Tax ID (or unique combination of Tax ID and PIN, if PIN was included in the search criteria); no duplicates. The user may choose to drill down from a listing to do work with the institutional info or to bring up info about the Individuals associated with that institution in order to spoof a person. In presenting institutional search results:

- Present 50 hits per page, not just 10. Let the page scroll.
- The default sort sequence is by whatever criterion/criteria the rep searched by. If they searched by more than one criteria, then the first three sort levels are: Provider name, Tax ID, PIN.
- Provider Record results do not include any information about any person associated with a provider record. Information about any individual person is available by drilling down from here by clicking the Details link.
- Include variant spellings, punctuation, and capitalization
- Ignore capitalization both in conducting a search and in sequencing results.
- If any long provider names need to be abbreviated or truncated, mousing over them brings up a Tool Tip that shows the full entry.

The institution name displayed here comes from CAPS.

C A lock icon appears adjacent to any Tax ID that is locked.

D **Link text:** Lock Tax ID if the ID is NOT locked or Unlock Tax ID if the ID is currently locked
Effect: load page PV.7.1

E **Link text:** [any Tax ID]
Effect: Load page PV3.1 Tax ID Details for that particular Tax ID


F **Link text:** [any PIN]
Effect: Load page PV3.2 PIN Details for that particular PIN

PV6: Institution Results (continued)

Comparison between old results and new (for reference only)

Pin Number	Tax ID	Tax ID Lock	Provider Name	Registrated Date	Business Type	Provider Type	Account Type	Name	User ID	BSC User ID	BSC Update Date
5422000A705900	490749764	No	William P Stanford	2005-01-31 13:05:37.0	BillingService	PHYSICIAN (MD OR DO)	Acct. Mgr.	Stanford, Frank	fstanford	3936	2005-02-25 08:16:50.0

Becomes "PIN"; included only if PIN was in search criteria
 Column eliminated
 Given only in Details page's history box
 On Details page only
 Given only in personal results, not institutional results

First 5 digits of PIN will be omitted
 PINs and Tax IDs will be with broken up into chunks separated by spaces
 Locked status indicated by  icon
 Time of day will be omitted
 Indicated by initial only
 Becomes "Person's name"
 Rep's name given instead
 Worked into Details page's history box
 Time of day will be omitted

PV7.1: Tax ID Detail (lock/unlock tax id)

Locking a Tax ID

For those reps with appropriate authority to change Tax ID lock status at all, clicking the "Lock Tax ID" link spawns a small dialog box very close to it:

The "Yes" action button is grayed out until at least one character is typed in in this text entry box.

- If the rep clicks "Yes" while the button is grayed out, a Tool Tip message appears telling them to enter a comment first.
- If the rep clicks "Yes" after entering a comment, the dialog box closes and the "lock" icon (🔒) is placed to the left of the tax id and the "Lock Tax ID" link is replaced with wording indicating that that Tax ID is now locked (State 2):

🔒 94 6036494 [Unlock Tax ID](#)

- If the rep clicks "No," the transaction is canceled and the checkbox returns to its original state (State 1).

The comment entered here appears in an account's history and on page PV8 Locked Tax ID Report.

[6-18-09] This dialog box and the "Unlock tax ID" dialog box must each be big enough to fit all of its contents without scrolling. In the current build, the box is too small, so the action buttons fall below the fold.

Unlocking a Tax ID

If the Tax ID is currently locked, every rep will see a lock icon (🔒) and a statement that it is locked.

- For reps who lack the authority to change Tax ID lock status, they will not see the Lock/Unlock link:
🔒 94 6036494
- For reps who have the authority to change Tax ID lock status, the statement will be a link (State 2):
🔒 94 6036494 [Unlock Tax ID](#)

If a rep with the appropriate authority clicks the link, a small dialog box is spawned very close to it:

🔒 94 6036494 [Unlock Tax ID](#)

The "Yes" action button is grayed out until at least one character is typed in the text entry box.

- If the rep clicks "Yes" while the button is grayed out, a Tool Tip message appears telling them to enter a comment first.
- If the rep clicks "Yes" after entering a comment, the dialog box closes and the lock icon and "Tax ID is locked" statement are replaced with a "Lock Tax ID" link (State 1):

94 6036494 [Lock Tax ID](#)

- If the rep clicks "No," the transaction is canceled and the presentation returns to its original state (Stage 2).

The comment entered here appears in an account's history and on page PV8 Locked Tax ID Report.

PV10: Provider Reports

The screenshot shows the 'blue of california' CS Admin interface. At the top right, there is a 'Log off' link and a greeting: 'Hello, Gabriella Linkenhaven-Perquosity'. Below this is the 'CS Admin' section with several tabs: 'Help a Member', 'Help a Provider', 'Help a Producer', 'Manage CS Admin Users', and 'Benefit Lookup'. A search bar is present with options: 'Search for a person', 'Search for an institution', and 'Reports'. Under the 'Reports' subtab, there are three links: 'Locked Tax IDs', 'Account status', and 'Provider Connection user'. A 'Help' link is also visible. The 'Reports' section contains a description and three detailed report entries, each with a link text and an effect.

Reports [Help](#)

These reports are designed to help CS Admin users quickly find and easily work with provider-related information such as name Tax ID, email addresses, as well as Provider Connection users. Reports can be created and displayed by following the easy-to-understand instructions or using drop-down menus.

C [Locked Tax IDs](#)
Tax IDs can be restricted or “locked” to prevent Provider Connection users from registering with a specific Tax ID. Use this report to identify all locked Tax IDs. You must be authorized to lock or unlock a Tax ID or to run this report.

E [Account status](#)
Find information on the registration status of user accounts on Provider Connection. Query by date and/or by registration status. This report can be used for reporting, following up or resolving incomplete registration.

G [Provider Connection user](#)
Search for registered Provider Connection users using different criteria and display results in a report. Sort by Tax ID number or provider name, among other choices.

Description:

This page is reached by clicking the Reports subtab in the Manage CS Admin Users tab. It is the starting point for getting any report.

http://wdh107wdoc01/doclibrary/emetrics/dailyreports/reports_pss.htm

This page is just like page CS12, CSA Reports.

Specifications:

A Each page within the Reports subtab will have a line of links just beneath the tab art, each leading to one of the specific report query pages. Note that the word “Report is omitted from these top links.

On this Reports page, none of these links is highlighted. But when the rep is on either the query page or the report page for a given report, the link to that query page is in the same highlight color as the subtab, but not bold. For example:

[Locked Tax IDs](#) [Account status](#) [Provider Connection user](#)

NOTE: Regardless of its color, the link to any given query page is hot unless you are already on that query page, in which case the link to that page is not clickable.

B **Link text:** Locked Tax IDs

Effect: Loads page PV8, Locked Tax IDs. Note that this is the only report that is reached directly, without going through a query page.

C **Link text:** Locked Tax IDs

Effect: Loads page PV8, Locked Tax IDs. Note that this is the only report that is reached directly, without going through a query page.

D **Link text:** Self-registered accounts

Effect: Loads page PV9, Search for Provider account activity

E **Link text:** Self-registered accounts

Effect: Loads page PV9, Search for Provider account activity


F **Link text:** Provider Connection user

Effect: Loads page PV11, Search for Provider Connection user

G **Link text:** Provider Connection user

Effect: Loads page PV11, Search for Provider Connection user

PV8: Locked TIN Report


[Log off](#)

Hello, Gabriella Linkenhaven-Perquosity

CS Admin

Help a Member
Help a Provider
Help a Producer
Manage CS Admin Users
Benefit Lookup

Search for a person
Search for an institution
Reports

[Locked Tax IDs](#)
[Account status](#)
[Provider Connection user](#)

Locked Tax IDs [Help](#)

View Tax ID details and or download results. Report displays a list of all Tax IDs currently locked. Results include Tax ID, registered provider name and CS Admin user comments. Authorized user may unlock a Tax ID by clicking on "Unlock" and entering a brief note explaining the action on the Tax ID.

Records 1-50 of 143 found 1 2 3 [Next](#) [Download report](#)

Tax ID	PIN Number	Provider name	Tax ID Update	Lockout Comments
94 6036494	HOSP 006YN	UC Davis Health Systems Longnameus	Terry Holmgren 2006-04-08	Unlock Lorem ipsum dolor et rapsidus sic Lorem ipsum dolor et rapsidus sic
94 6036495	HOSP 001YN	UC Davis Health Systems Longnameus	Terry Holmgren 2006-04-09	Unlock Lorem ipsum dolor et rapsidus sic Lorem ipsum dolor et rapsidus sic
94 6036496	HOSP 002YN	UC Davis Health Systems Longnameus	Terry Holmgren 2006-04-10	Unlock Lorem ipsum dolor et rapsidus sic Lorem ipsum dolor et rapsidus sic
94 6036567	HOSP 003YN	UC Davis Health Systems Longnameus	Jessica Pumpnickel 2007-12-16	Unlock Lorem ipsum dolor et rapsidus sic Lorem ipsum dolor et rapsidus sic
94 6036568	HOSP 004YN	UC Davis Health Systems Longnameus	Umberto Ricci 2008-02-03	Unlock Lorem ipsum dolor et rapsidus sic Lorem ipsum dolor et rapsidus sic
94 6036569	HOSP 005YN	UC Davis Health Systems Longnameus	Carlos Montoya 2008-06-23	Unlock Lorem ipsum dolor et rapsidus sic Lorem ipsum dolor et rapsidus sic
94 6036573	HOSP 008YN	UC Davis Health Systems Longnameus	Carlos Montoya 2008-06-23	Unlock Lorem ipsum dolor et rapsidus sic Lorem ipsum dolor et rapsidus sic

Records 1-50 of 143 found 1 2 3 [Next](#) [Download report](#)

Description:

This is only report page that is not reached via a query page. There are no search criteria to be specified, simply a fixed report. The page is reached by clicking the "Locked Tax IDs" subtab. Other than formatting changes to fit in with the rest of the new CS Admin design, this page is basically the same as the current report: https://www.blueshieldca.com/provider/admin/csr/search_user.jhtml?_DARGS=/provider/admin/csr/run_report.jhtml

See the reports also under the Manage CS Admin Users tab > Reports subtab.

Specifications:

A Note that, unlike other report results pages, this page does not offer a "New report..." link in this context, because Locked Tax IDs does not have any query page lead to.

B Tax ID is the default sort for the table. The current report does not allow any sorting, so this design does not call for it. But if possible, we should enable users to sort by giving them the same kinds of sort widgets offered on all other search results pages.

C **Link text:** [any Tax ID]
Effect: Loads PV3.1: Details for tax ID page for that tax ID

D **Link text:** Unlock
Effect: "Unlock" links are offered only to reps with authority level XXX or higher. For reps with lower authority levels, this column of links is omitted. For authorized reps, clicking an "Unlock" link spawns a small dialog box very close to it:

This Tax ID was locked by Aloysius Hennigan 03/22/2006, with the comment "Per telephone request by Larry Morrison."

1. Enter a comment explaining why you are unlocking this tax ID:

2. Are you sure you want to unlock this Tax ID? Unlocking it will enable BSC staff to add users to this account on the provider's behalf.

Yes
No

Status quo (for reference only)

Locked Tax ID Accounts				
Tax Id	PIN Number	Provider Name	Lockout Comments	TIN Update
123123123	123123123	Email Test		
123123123	123123123	asfdads		BSC ID 1525 2006-10-24 20:39:37.0
123123123	123123123	kaho		
123123123	123123123	test		
201645349	201645349	centinela hospital	Restricted 10/25/06 by R. Shields per: Granville Thomas Sr. Information Systems Analyst Centralized Business Office 310-330-8431	BSC ID 6378 2006-10-25 10:23:44.0
208837671	208837671	Japanese Performers Inc	Not a Provider	BSC ID 4614 2008-05-01 13:50:40.0
208837671	208837671	Takayuki Tomohiro		
237064656	237064656	MONTGRAIN		
237064656	237064656	Patrica Judd, PhD	Locked by Kaho, 7/21/2006.	BSC ID 1525 2006-07-21 00:39:31.0
237064656	237064656	Read		

Results (1-10 of 25310) Page: 1 2 3 4 5 6 7 8 9 10 Next >>

(Note that this dialog box in the way it works is identical to this description on PV7: Institutional Unit's Details (continued). The only difference is that it is invoked from here by the "Unlock" link, whereas elsewhere it is invoked by other means.)

The "Yes" action button is grayed out until at least one character is typed in the text entry box.

- If the rep clicks "Yes" while the button is grayed out, a Tool Tip message appears telling them to enter a comment first.
- If the rep clicks "Yes" after entering a comment, the dialog box closes and the listing for that Tax ID is omitted from this page.
- If the rep clicks "No," the transaction is canceled and the dialog box closes. This page is unchanged.

The comment entered in this dialog box appears in the history box on page PV 3.1: Details for Tax ID.

E Tax ID data consists of the name of the rep who locked this Tax ID and date on which the locking occurred. The information comes from the record of the rep's activity locking the Tax ID. Note that, unlike the status quo, we do not show the time of day; only the date.

F TIN Updates and Lockout Comments may be too long to fit in a single line, so they may wrap. If they do wrap, rows appear flush top (as in this mockup), NOT centered vertically as they do currently.

G **Link text:** [any PIN]
Effect: Load page PV3.2 PIN Details for that particular PIN

PV11: Search for Provider Connection user

blue of california [Log off](#)

Hello, Gabriella Linkenhaven-Perquosity

CS Admin

Help a Member **Help a Provider** Help a Producer Manage CS Admin Users Benefit Lookup

Search for a person Search for an institution **Reports**

[Locked Tax IDs](#) [Account status](#) [Provider Connection user](#) [Help](#)

Search for Provider Connection user

Enter your search criteria and click "Create report." Click "Reset form" to return all form fields to their default values. You may enter the first part or the entire Tax ID, provider name, user last name of login. You also may use wildcards (*) within the Tax ID number, provider name, user last name or login.

Report type: Select report type **B**

Tax ID number:

Provider name:

User last name:

Login:

Registered between: Mm/dd/yyyy and Mm/dd/yyyy

Last activity between: Mm/dd/yyyy and Mm/dd/yyyy

Provider type: Select provider type

User type: Select user type

User status: Select user status

Show results: First 200 records only (recommended) All records

Sort results first by: Tax ID number

Then sort by:: Provider name

A **C** **D**

Description:

This page is reached by clicking the Provider Connection user link on the Reports subtab PV10 or the "Provider Connection user" link at the top of any page within the Provider Reports subtab. It is exactly the same Provider Self-Service functionality currently located at:
http://wdh107wdoc01/doclibrary/emetrics/dailyreports/reports_pss.htm

There are only a few minor wording changes – including replacing the term "Provider self service" with "Provider Connection user" -- and the layout is different. Otherwise, everything is unchanged except as noted below.

Specifications:

A See page CS12, Reports, for description of this line of links. On this specific page only, the link "Provider Connection user" is not clickable.

B Whereas report type is a set of radio buttons currently, this design offers the same set of options in a listbox, with the default selection being "Select report type."

C "Report Index" link is omitted

D Whereas the current page has the search widget in one frame and presents the results in another frame, this new design does not use frames at all. So clicking the Create report button (same as the current "Search" button) loads the report not in a frame but on a new page, PV11, Provider Connection user.

Current widget (for reference only)

myworkpath

Report Type:

Users
 Unique tax ID count
 Unique provider count
 Unique users count
[Report Index](#)

Search Criteria:

Tax ID number:

Provider name:

User last name:

Login:

Registered between: mm/dd/yyyy and mm/dd/yyyy

Last activity between: mm/dd/yyyy and mm/dd/yyyy

Provider type: - any -

User type: - any -

User Status: Registered

Limit output to: first 2000 records (recommended) all records

Sort Sequence:

Sort by: Tax ID number

then by: Provider name

PSS Reporting

Please enter your search criteria and click the "Search" button.

Click the "Reset" button to return all form fields to their default values.

All parameters are optional.

You may enter either the first part or the entire Tax ID number, Provider name, User's last name or Login. You may also use wildcards (*) within the Tax ID number, Provider name, User's last name or Login.

Where multiple criteria are specified, all conditions must be met for the data to be included.

CS12: CSA Reports

blue of california [Log off](#)
Hello, Gabriella Linkenhaven-Perquosity

CS Admin

Help a Member | Help a Provider | Help a Producer | **Manage CS Admin Users** | Benefit Lookup

View my own account details | Set up/Modify CS Admin user | **Reports**

A [Member account activity](#) **B** [Provider account activity](#) **D** [CS Admin users](#) **F**

Reports [Help](#)

These reports are designed to help manage the CS Admin user activity that relates to assisting members and providers. Reports can include details of “spoofing” sessions, password resets and other member, provider and CS Admin account changes. You can search and view results online in summary or in detail. You also can download the results in an Excel-friendly CSV format file.

C [Member account activity](#)
Displays search results for the purpose of following up, researching and managing member Portal accounts. Search results can be displayed with or without details and can be sorted. Types of tracked activity include CS Admin user session comments and “spoofing” sessions.

E [Provider account activity](#)
Displays search results for the purpose of following up, researching and managing member Provider Connection accounts. Search results can be displayed with or without details and can be sorted. Types of tracked activity include CS Admin user session comments and “spoofing” sessions.

G [CS Admin users](#)
Reporting tool for Administrators and Super Administrators that helps them manage individual CS Admin user accounts. You can update or change privileges, reactivate or disable accounts.

Description:

This page is reached by clicking the Reports subtab in the Manage CS Admin Users tab. It is the starting point for getting any report.

http://wdh107wdoc01/doclibrary/emetrics/dailyreports/reports_pss.htm

This page is just like page PV 10, Provider Reports.

Specifications:

A Each page within the Reports subtab will have a line of links just beneath the tab art, each leading to one of the specific report query pages. Note that the word “Report is omitted from these top links.

On this Reports page, none of these links is highlighted. But when the rep is on either the query page or the report page for a given report, the link to that query page is in the same highlight color as the subtab, but not bold. For example:

[Member account activity](#) [Provider account activity](#) [CS Admin users](#)

NOTE: Regardless of its color, the link to any given query page is hot unless you are already on that query page, in which case the link to that page is not clickable.

B **Link text:** Member spoofing
Effect: Loads page CS12.1, Search for Member account activity

C **Link text:** Member account activity
Effect: Loads page CS12.1, Search for Member account activity

D **Link text:** Provider spoofing
Effect: Loads page CS12.2, Search for Provider account activity

E **Link text:** Provider account activity
Effect: Loads page CS12.2, Search for Provider account activity

F **Link text:** CS Admin users
Effect: Loads page CS12.4, Search for CS Admin users

G **Link text:** CS Admin users
Effect: Loads page CS12.4, Search for CS Admin users

AUTHOR	TITLE	FILENAME	CREATE DATE	REVISED	PAGE
John Boykin	CS Admin, Phase 2	CSadminWires.vsd	8/28/2007	11/8/2009	20 OF 25

CS12.1.1: Member account activity report

blue of california [Log off](#)
Hello, Gabriella Linkenhaven-Perquosity

CS Admin

Help a Member | Help a Provider | Help a Producer | **Manage CS Admin Users** | Benefit Lookup

[View my own account details](#) | [Set up/Modify CS Admin user](#) | **Reports**

A [Member account activity](#) | [Provider account activity](#) | [CS Admin users](#) | [Help](#)

Member account activity report

Displays CS Admin user activity related to member accounts. Clicking on any name listed in either User ID column launches that person's profile, which then can be viewed or updated. Clicking "Details" in the Member results report section can be viewed online or downloaded.

Records 1-50 of 143 found **B** [1](#) [2](#) [3](#) [Next](#) [Modify search or new search](#) [Download all details](#) [Download without details](#)

Sort results first by: Then by: Then by: [Open all details](#) **F**

CS ADMIN USER G					MEMBER			
K Last name	First name	User ID	Department	Location	Last name	First name	User ID	
Miller	Ann	crazyAnn L	Lorem Ipsum 1	Lorem Ipsum A	Jacobson	Warren	jakewar21	Details
Miller	Marie	LoremipsumA	Lorem Ipsum 2	Lorem Ipsum B	H Anderson	Marybeth	I soccer45	Details J
Miller	Suzanne	LoremipsumB	Lorem Ipsum 3	Lorem Ipsum C	Perriwinkle	Heironymous	Runyon99	Details
Miller	Tammy	LoremipsumC	Lorem Ipsum 4	Lorem Ipsum D	Youngblood	Longnameous	bloody43	Details

Records 1-50 of 143 found **B** [1](#) [2](#) [3](#) [Next](#) [Modify search or new search](#) [Download all details](#) [Download without details](#) [Top of page](#)

Description:

This page is reached by clicking the Search button on the page CS12.1 , Search for Member account activity, after having made at least one valid entry in the form field.
The results table defaults to State 1 (details closed). See next page for other possible states.

Specifications:

- A** **Link text:** Member spoofing
Effect: loads CS12.1 Search for Member account activity. See page CS12, Reports, for description of this line of links.
- B** **Link text:** Modify search or new search
Effect: loads CS12.1 Search for Member account activity, populated with all search criteria the rep entered on their previous search.
- C** The search widget is not repeated on this report page, because it would take up too much room.
- D** This page's pair of download links differ from the standard download link used with other search results in CS Admin.
Link text: Download all details
Effect: Launches standard download process of a version of this report that includes all details (i.e., in State 3).
- E** **Link text:** Download without details
Effect: Launches standard download process of a version of this report that omits the details (i.e., each listing is in State 1).
- F** **Link text:** Open all details
Effect: Changes display of all listings from default State 1 to State 3. See the following page for details.
- G** The data in the left side of this table all applies to reps who have spoofed. The data in the right side all applies to members whom they have spoofed. To keep them clearly separate, each side is set over a different light-colored background and has a prominent section head ("CS ADMIN USER" for one side and "MEMBER" for the other side) above the column headers.
If the rep has clicked "Open all details," this background shading is used only in the header and not within the main body of the table:
- H** Regardless of how many times any given rep has spoofed any given member, there will only ever be one listing on the surface for that unique combination of a rep and a member. The number of spoofing sessions for that combination is revealed only into details (State 1).
Suppose a given member has been spoofed by three different reps, one of whom has spoofed him five times. There would be only three listings on the surface, one for each unique combination of member and rep.
- I** **Link text:** [member's user ID]
Effect: Load this member's profile within CS Admin (M3: Member profile).
Note that this table includes two User ID columns: one for the CS admin user who did the spoofing, and one for the member who was spoofed.
- J** **Link text:** Details
Effect: Changes only the listing on which the clicked link appears, from State 1 to State 2. The link toggles to [Close](#)
Clicking either the close box or the link itself returns that listing from State 2 to State 1 and toggles the link back to "Details."
- K** If the rep searched by CS Admin user field(s), the default sort for the results is by CS Admin user's last name.
If the rep searched by member field(s), the default sort is by member's last name.
If the rep searched by both CS Admin user field(s) and member field(s), the default sort is by CS Admin user's last name.
- L** The CS admin user's user ID is a link only if the rep viewing this report is an Admin or Super Admin.
Link text: [rep's user ID]
Effect: Loads the listed rep's profile, CS5, Modify CSA user profile
Note that this table includes two User ID columns: one for the CS admin user who did the spoofing, and one for the member who was spoofed.

CS12.1.1: Member account activity report (cont.)

State 1 (details closed -- default)

Miller	Ann	crazyAnn	Lorem Ipsum 1	Lorem Ipsum A	Jacobson	Warren	jakewar21	Details
Miller	Marie	LoremipsumA	Lorem Ipsum 2	Lorem Ipsum B	Anderson	Marybeth	soccer45	Details
Miller	Suzanne	LoremipsumB	Lorem Ipsum 3	Lorem Ipsum C	Perriwinkle	Heironymous	Runyon99	Details
Miller	Tammy	LoremipsumC	Lorem Ipsum 4	Lorem Ipsum D	Youngblood	Longnameous	bloody43	Details

State 2 (details open)

Miller	Ann	crazyAnn	Lorem Ipsum 1	Lorem Ipsum A	Jacobson	Warren	jakewar21	Details
A Miller	Marie	LoremipsumA	Lorem Ipsum 2	Lorem Ipsum B	Anderson	Marybeth	soccer45	<input checked="" type="checkbox"/> Close C
B <ol style="list-style-type: none"> 2007-08-11: E-mail, user status. This spoofing session's note text note text lorem ipsum dolor sit rapsidus Note text lorem ipsum dolor sit rapsidus Note text lorem ipsum dolor sit rapsidus 2007-08-27: Last name. This spoofing session's note text lorem ipsum dolor sit rapsidus Note text lorem ipsum dolor sit rapsidus Note text lorem ipsum dolor sit rapsidus sit rapsidus Note text lorem ipsum dolor sit rapsidus 2007-09-04: Password. This spoofing session's note text lorem ipsum dolor sit rapsidus Note text lorem ipsum 								
Miller	Suzanne	LoremipsumB	Lorem Ipsum 3	Lorem Ipsum C	Perriwinkle	Heironymous	Runyon99	Details
Miller	Tammy	LoremipsumC	Lorem Ipsum 4	Lorem Ipsum D	Youngblood	Longnameous	bloody43	Details

State 3 (All details open)

Sort results first by: Then by: Then by: [Close all details](#) **D**

CS ADMIN USER					MEMBER			
Last name	First name	User ID	Department	Location	Last name	First name	User ID	
E Miller	Ann	crazyAnn	Lorem Ipsum 1	Lorem Ipsum A	Jacobson	Warren	jakewar21 H	
F <ol style="list-style-type: none"> 2007-08-11: E-mail, user status. This spoofing session's note text note text lorem ipsum dolor sit rapsidus Note text lorem ipsum dolor sit rapsidus Note text lorem ipsum dolor sit rapsidus 2007-08-27: Last name. This spoofing session's note text lorem ipsum dolor sit rapsidus Note text lorem ipsum dolor sit rapsidus Note text lorem ipsum dolor sit rapsidus sit rapsidus Note text lorem ipsum dolor sit rapsidus 2007-09-04: Password. This spoofing session's note text lorem ipsum dolor sit rapsidus Note text lorem ipsum 								
G Miller	Marie	LoremipsumA	Lorem Ipsum 2	Lorem Ipsum B	Anderson	Marybeth	soccer45	
<ol style="list-style-type: none"> 2007-08-11: E-mail, user status. This spoofing session's note text note text lorem ipsum dolor sit rapsidus Note text lorem ipsum dolor sit rapsidus Note text lorem ipsum dolor sit rapsidus 2007-08-27: Last name. This spoofing session's note text lorem ipsum dolor sit rapsidus Note text lorem ipsum dolor sit rapsidus Note text lorem ipsum dolor sit rapsidus sit rapsidus Note text lorem ipsum dolor sit rapsidus 								
Miller	Suzanne	LoremipsumB	Lorem Ipsum	Lorem Ipsum C	Perriwinkle	Heironymous	Runyon99	

Description:
These are the different states in which the presentation may appear.

Specifications:

A When a Details link has been clicked, that rep's spoofing activity details are listed as shown here. A light color background (that differs from the other two colored backgrounds on this page) appears behind the information to highlight it and tie it all together. The shaded background does not appear if the "Open all details" link has been clicked, since its usefulness would be lost if they were behind every list.

B Each member spoofing episode is listed in order, with most recent at top. The first line of each listing is indented from its master listing. If a note runs more than one line, the second and any subsequent lines are indented further.

Each note is numbered if there is more than one note. If there is only one note, it is not numbered. The sequence of data points are: note number (if any), date, concise summary of what happened, note text (if any).

Note text appears verbatim as entered at the time of the spoofing session.

If there is no note for a particular spoofing session, only the other data points appear.

C Link text: Close

Effect: Clicking either the close box or the link itself returns that listing from State 2 to State 1 and toggles the link back to "Details."

State 3 (All details open)

This state is presented only if the rep has clicked the "Open all details" link above the results table.

D The "Open all details" link toggles to "Close all details." Clicking "Close all details" link returns all listings on the page back to default State 1.

E The colored background appears only behind the column headers, not within the body of the table.

F Details text is in gray type with no bold, so it is less prominent than the non-details info.

G A thin gray horizontal line separates each listing.

H The rightmost column, which otherwise would show either a "Details" link or Close, is omitted.

Old revision history of this document

10/1/2007 v.0.1 **John Boykin** First draft

1/21/2008 v. 1.0 **John Boykin** Revisions based on feedback from Ryan Shields to split the search functionalities; reports added; too many ad hoc changes here and there to list

1/22/2008 v. 2.0 **John Boykin**

- Added new designs of some pages that the Phase 1 wireframes treated as temporary pickups: Login, Member Restrictions, Producer. Version 1.0 of this Phase 2 document already offered redesigns of other pages that had been marked as temporary pickups in the Phase 1 wireframes: Search providers, Spoof from username, and Reports. Benefit Lookup will remain a temporary pickup until the summer 2007 redesign of Benefit Lookup is implemented. Shifted members was treated as a temporary pickup in Phase 1; since so few reps use it, it will be a permanent pickup.
- Updated Help a Member subtabs: Removed Reports (since all reports are now under Manage CS Admin Users tab), replaced Restrictions with New Restrictions and Existing Restrictions.
- Revised site map to reflect redesigned Member Restrictions flow
- PV3a Provider person's profile and PV3b, Provider person's profile (account manager): Added reset password functionality
- Sent out only non-provider pages as v. 2.0

1/25/2008 v. 3.0 **John Boykin**

- Site map: Added CS7, Duplicate record notice

5/19/2008 v. 4.0 **John Boykin**

5/29/2008 v. 4.1 **John Boykin**

Revisions too extensive to list, based on decisions made in phase 1 and feedback from Kimberly Skuta

6/2/2008 v. 4.2 **John Boykin**

Added new design for PV9.1, Report: Self-Registration Accounts
Miscellaneous minor corrections in subtabs and site map

6/27/2008 v. 5.0 **John Boykin**

Deleted the following pages from document:

- CS10: Login page
- Shifted members

Throughout:

- Replaced term "Member restrictions" with "Member restrictions"
- Added Sort button to search results tables
- Replaced 10 prior searches with 5 prior searches
- Replaced status quo's offer to show first 2000 records with 200 records
- Replaced "Who uses CS Admin" wording with "CS Admin users"

This cover page, Terminology note: Added Admin and Super Admin; distinguished ordinary Rep from them

Site map: Reconfigured Member restrictions pages

Miscellaneous issues: Removed discussions about duplicate registrations and unregistering an account

Help a Member tab:

- Combined New restrictions and Existing restrictions into a single Member Restrictions subtab
- Revised restrictions workflow and added workflow diagram
- Changed page titles
- Resequenced pages

PV3x Provider: Person's profile (both user and account manager):

- Combined Tax IDs and PINs in a single table
- Added sort capability to that table
- Added text entry box for notes about changes being made

PV3.1 Tax ID Details: Added intro

PV4 Search an institution: Replaced registration status listbox with checkboxes and added "Any" as an option

PV6 Institutional results:

- Replaced Registration status list box with checkboxes.
- Specified what happens if you click a Tax ID or PIN.
- Specified search results sort order
- Added note about where the comment entered in the Block Tax ID dialog box appears.

PV7 Institutional unit's details: Added anchor links

PV8: Locked TIN report: Replaced Tax ID Update sample info and added annotation about it

CS12.1 Query: Member account activity: Added * to Last activity date range as the only required field. added details to annotation about calendars.

CS12.1.1 Report: Member account activity: Added column for name of member who was spoofed.

CS12.2 Query: Provider account activity: Added five search fields for who was spoofed

CS12.2.1 Report: Provider account activity:

- Removed PIN column
- Added provider name column
- Added Person ID to details box

CS 12.4 Query: CS Admin users:

- Changed page title and subtab wording
- Changed user types
- Added two sub-privileges under May help providers

CS12.4.1 Report: CS admin users:

- Changed column and from "Disabled?" to "Status," added "Active," and specified typographic treatment
- Changed user types

7/23/2008 v. 6.0 **John Boykin**

Changed SCR number

Throughout:

- Changed 2-digit privacy number to 3-digit member number
- Replaced term "inactive account" with "disabled account"

Member tab: changed "Privacy restrictions" to "Member restrictions"

M6, Member restrictions search:

- Added Subscriber number field and format specs for dates
- Removed middle name field

M7, Member restrictions results:

- Added subscriber number field and format specs for dates
- Changed format of dates in results example
- Removed middle name field

M8, Member restrictions data page:

- Removed ability to edit any field except dates
- Added date format note
- Removed middle name field

M4, Create new member restrictions:

- Added spec about Cancel button
- Removed middle name field

M5, Confirm new member restrictions:

- Changed format of dates in results example
- Removed middle name field

PV1, Provider person search: Revised wording of first name, last name, and institution name field labels

PV2, Provider person search results:

- Revised wording of first name, last name, and institution name field labels in search widget
- Moved PIN column and added a note about when it appears
- Removed option to include near matches
- Corrected abbreviation for account manager in Account Type column
- Added footnote explaining password expiration icon
- Added words to password expiration icon's rollover

PV3a, provider, Person's profile (user):

- Replaced PIN with Tax ID
- Added registration and business type in top half of page
- Removed PIN and Business type columns from table
- Removed checkboxes for locking tax IDs

PV3b, provider, Account managers profile:

- Made page like individual user's profile, PV3 and revised annotations pointing out differences accordingly
- Removed right-click spoofing functionality

PV4, Search institution: Removed registration status as a search criterion

PV7, Provider: institutional unit's details:

- Added sample claims access indicators
- Changed disabled account indicator to match the one used for institutions in search results
- Removed right-click spoofing functionality

8/11/2008 v. 7.1 John Boykin

Added page about download procedure

8/11/2008 v. 7.0 John Boykin

PV1: Search a person:

- Replaced listbox with checkboxes for Registration status
- Removed prior search functionality

PV2 Provider: Person's results:

- Made Tax ID a link
- Made provider name not clickable
- Clarified wording accompanying password expiration icon
- Changed destination of PIN link

PV3a Provider: Person's profile (user): Added Tool Tip text for Spool link

PV3b Provider: Person's profile (account manager): Removed right-click functionality from user listing

PV3.1, PINs for Tax ID: Changed lock/unlock Tax ID functionality

PV3.2 PIN's details: Changed to pick up existing

PV4, Search an institution: Removed prior search functionality

PV6: Institutional Results:

- Removed locking functionality
- Moved description of locking functionality to PV7, Provider: institutional units details
- Removed prior search functionality

PV7, Provider: institutional units details

- Rearranged placement of elements
- Made Tax ID more prominent
- Eliminated Tax ID section

PV8, Locked Tax ID report: Modified lock/unlock functionality

Throughout Provider Reports section:

- Replaced wording "Query:" with "Search for" in page titles
- Changed action button wording to "Search"
- Removed "Download Report" button from search pages
- Made user IDs links to profile pages
- Changed listbox default selections to All departments and All locations
- Changed download link into two separate links
- Changed wording of New report link

CS12: CSA Reports: Removed "Reports:" from beginning of link wording

CS12.1: Search for Member account activity: Changed page title

CS12.1.1, Member account activity:

- Split table into 2 clearly separate sections
- Split members name into two separate columns
- Removed Latest Activity and Times columns
- Added member user ID column
- Added mockup of State 3, All details open
- States 2 and 3:
 - Numbered line items
 - Removed member name, subscriber ID, and user ID
 - Changed wording of Close link

CS 12.2: Search for Provider account activity: Added note about institution name

CS12.2.1: Provider account activity

- Same changes as for CS12.1.1, Members spoofing activity (see note above)-- plus:
- Removed provider name, tax ID, PIN, end user ID from states 2 and 3

CS12.4: Search for CS Admin users

- Added latest activity fields
- Changed some radio buttons to checkboxes and specified defaults
- Added All privileges and No privileges, and grayed out subprivileges in default state
- Added radio buttons for how many records to show in the report

CS12.4.1, CS admin users report

- Added privileges column
- Changed word "Authority" to "Privileges" in details
- Removed helping producers as a privilege in details
- Added annotation specifying where details notes come from
- Added account creation date and latest login date in details

9/2/2008 v. 8.0 John Boykin

Throughout: Replaced term "Provider self-service" with "Provider Connection user"

Spoofing Indicator page: Added new spec about trying to start a new spoofing session without having exited the old one

Added updates to the following Phase 1 pages:

- CS1: View my CSA account
- CS 5: Modify current CSA account
- CS6: Set new CSA user
- CS 11: Change password intercept

P1, Producer: Put all Producer Connection activity in a new browser window

PV2, Provider: Person's Results:

- Changed registration status to checkboxes
- Clarify cross-reference to discussion of how disabled accounts are shown
- Added specification for truncating long provider names

PV3a Provider, Person's profile

- Added notes about what happens if there is no account manager
- Specified which institution's name gets shown
- Added note about adding close box to expanded history of profile box

PV3.1 Details of Tax ID 9999999

- Changed page title
- Removed Business type column
- Added note about CAPS data
- Added link to PV7, provider: institutional Unit's Details
- Added history box and "Top of page" anchor link

PV4: Search an institution

- Added note about CAPS
- Removed business type
- Added two more listboxes for provider type
- Changed spec to call for all fields to be cleared when rep returns to this page

PV6: Institutional results:

- Made same changes to search widget as described above for PV4, plus removed Registration status
- Specified that PIN column appears only if PIN was part of search criteria
- Removed registration status column
- Added Provider type column
- Removed possibility of multiple listings of same Tax ID or PIN
- Updated comparison between old and new

PV7: Institutional unit's details:

- Removed PIN and Latest login
- Removed option to Show user IDs only
- Removed profile history

PV8: Locked TIN Report

- Removed duplicate tax ID's
- Removed PIN column
- Added note that comment in dialogue box appears on page PV 3.1

PV9: Search for registration status

- Changed page title
- Added "Registration date Range" line
- On Registration status line, replaced listbox with checkboxes

PV9.1 Registration status report

- Changed page title
- Renamed column headings to User's name and User ID
- Made user's name a link
- Added note about which provider name is displayed

CS1, CS5, CS6, and CS11: Added spec about the Password guidelines link

CS5, Modify current CSA user profile: Added spec about Top of the page link

CS 12.1 Search for Member account activity, and CS 12.2: Search for provider spoofing activity:

- Removed requirement that last activity be specified
- Added spec about lack of date
- Revised spec about calendars

CS 12.4.1: CS admin users report

- Removed privileges column from table
- Added Latest login column to table
- Removed horizontal Latest Login line from details (State 2)

AUTHOR	TITLE	FILENAME	CREATE DATE	REVISED	PAGE
John Boykin	CS Admin, Phase 2	CSadminWires.vsd	8/28/2007	11/8/2009	24 OF 25

9/24/2008 v. 9.0 John Boykin

Throughout:

- Replaced term "Provider portal" with "Provider Connection"
- Replaced term "spoofing activity" with "account activity"

Benefit Lookup: Added description of top-of-page revisions

Global elements: Tabs:

- Removed subtabs from Benefit Lookup tab
- Added note about "Search by user ID" subtab

Global elements: Search results: Added paragraph about duplicate listings

PV1: Search a person

- Deleted Provider Registration link
- Moved User ID field up

PV2, Provider: Person's results

- Moved User ID field
- Specified page refreshes if rep clicks checkbox to include disabled accounts
- Changed "Provider name" to "institution name"
- Revised notes about groups of names and institution names

PV3a, Provider: Person's profile (user):

- Removed "Send e-mail" link
- Removed Provider type column
- Made password success message more prominent
- Revised annotation about Tax IDs

PV3b, Provider: Person's profile (account manager)

- Removed "Send e-mail" link
- Added tax ID number to "Users associated with..." heading
- Added note about display options for "Users associated with..." section
- Removed Provider type column

PV3.1, Tax ID details: Expand note about "Show all users" link

PV4: : Search an institution: Removed Provider Registration link

PV6, Institutional results:

- Expanded description
- Changed "Provider name" to "institution name"
- Eliminated key to symbols that no longer appear
- Specified where displayed name comes from

PV7, Provider: institutional unit's details: Added spec about page refreshes

CS1: View my CSA account; CS5: Modify current CS admin user profile: CS6: Set a new CS admin user: Expanded note about the new privileges

CS12.1.1 Member account activity report:

- Added "Sort now" action button
- Corrected note about "Download all details" link

CS 12.2: Search for provider account activity: Added user ID field

CS 12.2.1: Provider Activity report: Added "Sort now" action button

CS 12.4: Search for CS Admin users:

Added user ID field

Various corrections in annotations

CS12.4.1 CS Admin users report: Added "Sort now" action button

9/30/2008 v. 9.1 John Boykin

Throughout: Inserted pages from Phase 1 that are referred to in Phase 2 annotations

Member restrictions section:

- Added note to right of subscriber number field
- Replaced term "9-digit subscriber number" with "Subscriber number"
- Replaced term "3-digit system number" with "3-digit member number"

PV 1: Provider: Search a person: Revised intro text, changed spec to clearing form every time

PV 2 Provider: Person's results: Removed "TIN locked" from list of registration status possibilities

PV 3a: Provider: Person's profile (user)

- Added New search link
- Made Notes box bigger and added message inside of box
- Tweaked description text and corrected note about the Tax ID section
- PV7: Provider: institutional unit's details: Added "New search" link
- PV11: Search for Provider Connection user: Removed "Report Index" link
- CS5: Modify current CS admin user profile: Modified note about privileges
- CS6: Set up new CS admin user: Modified note about privileges
- CS 12.1.1: Member account activity report (cont.): Added summary to each note in details section
- CS 12.2.1: Provider account activity report (cont.): Added summary to each note in details section
- Benefit Lookup: Removed Document link

12/8/2008 v. 9.5 John Boykin

PV3.1, Tax ID details: Eliminated "Show all users" column from table and made it a single link above the intro

PV 6, Institutional results: Removed status listbox

10/28/2008 v. 9.4 John Boykin

Global elements, Search results elements: Added info/links line below search results

CS1: View my CSA account: Moved Password guidelines link and revised annotation about it

PV3a and b:

- Removed second sort listbox
- Added line below table explaining lock icon

PV6, Institutional search results: Corrected note about lock icon

PV 9.1: Registration status report: Added "Records...found" to info/links line below search results

10/06/2008 v. 9.3 John Boykin

PV1, Search a person; PV9 Search by registration status: Changed spec for what happens if "Any" registration status is chosen

10/06/2008 v. 9.2 John Boykin

Removed "Printer friendly version" link from Benefit Lookup & corrected SCR number

AUTHOR	TITLE	FILENAME	CREATE DATE	REVISED	PAGE
John Boykin	CS Admin, Phase 2	CSAdminWires.vsd	8/28/2007	11/8/2009	25 OF 25