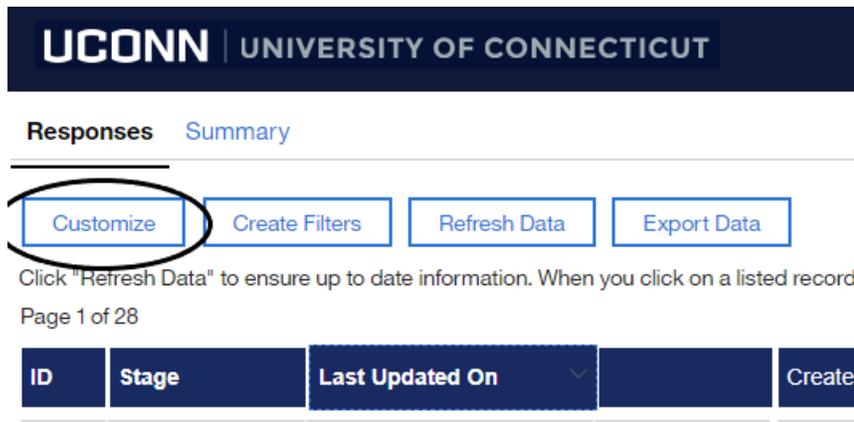


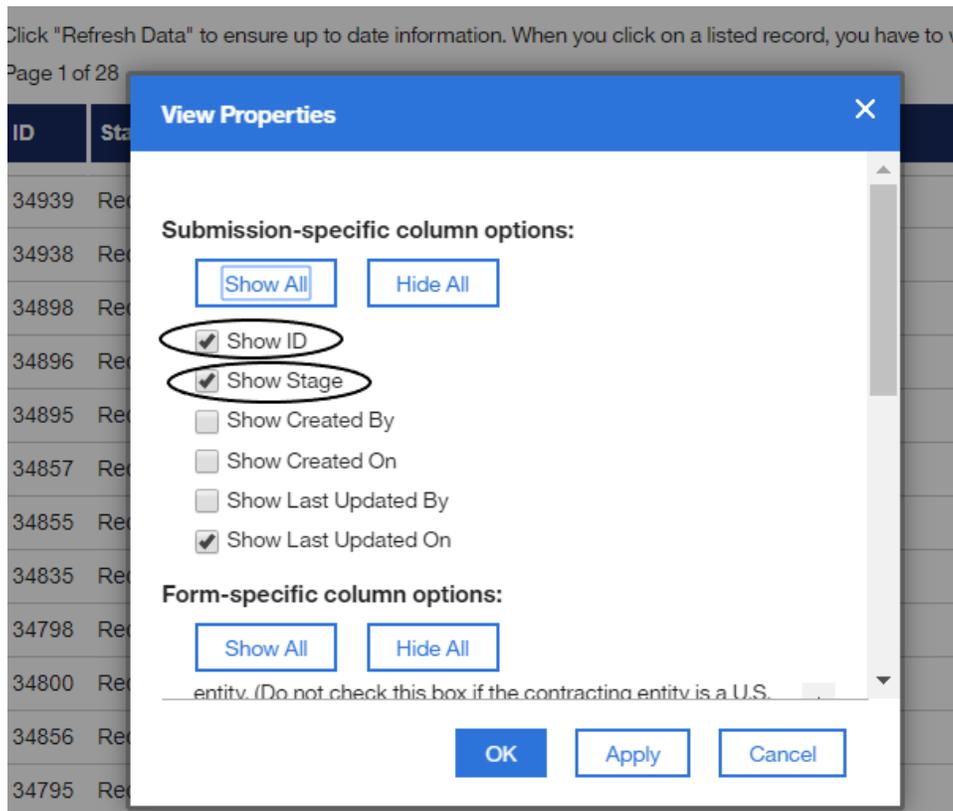
Applying Filters to find your Reconciliation requests:

Note: Your computer may already be set to list a large number of data fields from your request forms. You can control which fields are displayed. In order to filter for the correct reconciliation reports you will need in the least to turn on the following fields which are also circled below: Show ID, Show Stage, Show Last Updated On, The earliest date (mm/dd/yyyy) in the fiscal year the consulting will start, The latest date (mm/dd/yyyy) in the fiscal year the consulting will take place, Save filter and sort settings.

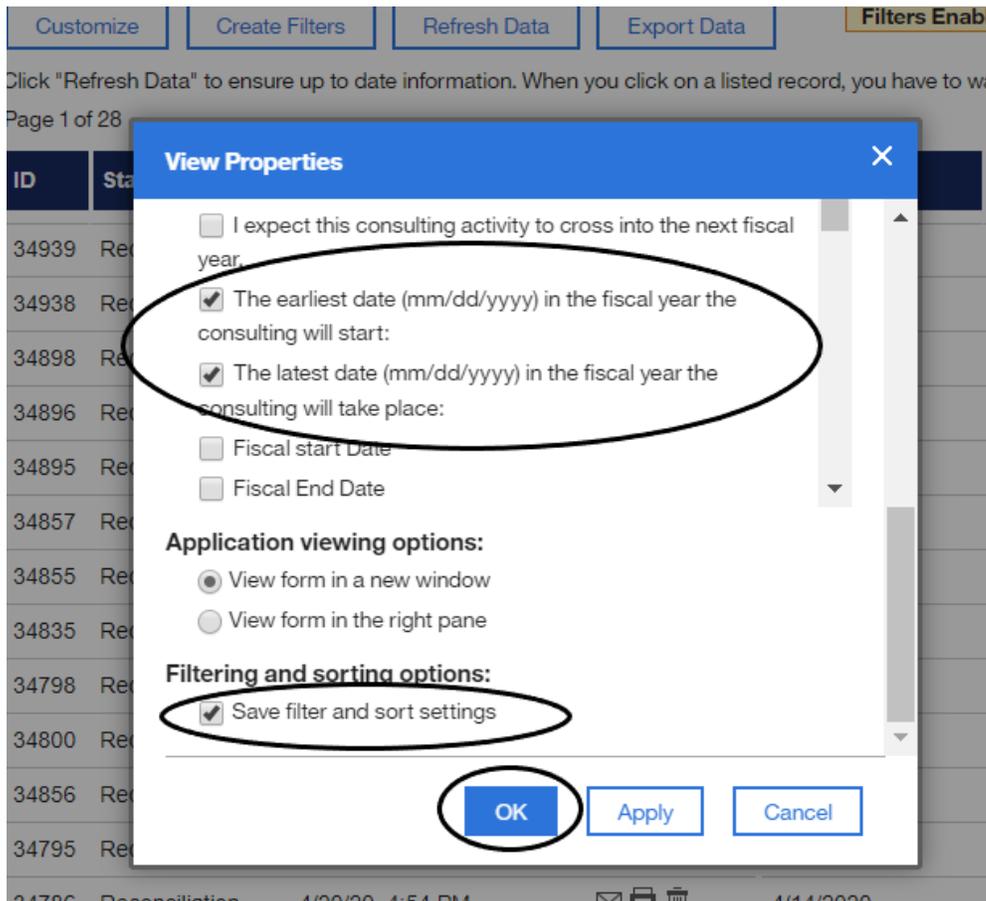
1. Once you are in the dashboard click on "Customize" button at the top left of the dashboard.



2. A "view properties" menu will appear. Make sure to check off the following boxes under "Submission-specific column options": "Show ID" and "Show Stage" (see image below)

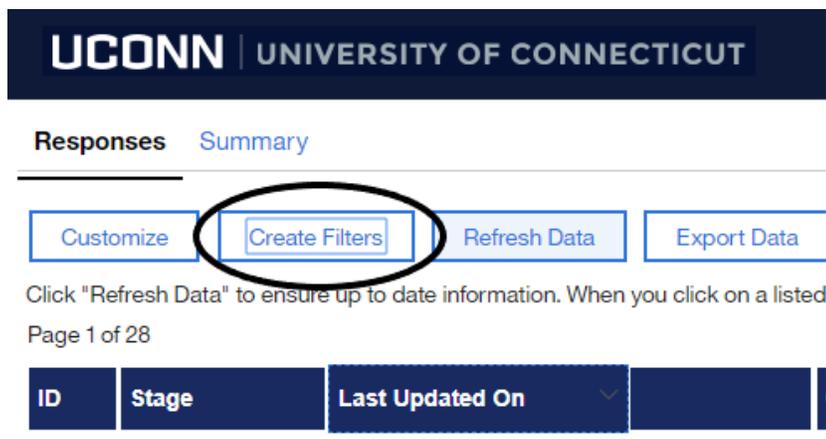


3. Scroll down "Form-specific column options" and make sure to check off the following: "The earliest date (mm/dd/yyyy) in the fiscal year consulting will start" and "The latest date (mm/dd/yyyy) in the fiscal year the consulting will take place:" Also remember to click on "Save filter and sort settings" then hit the "OK" blue button in order to save these changes.

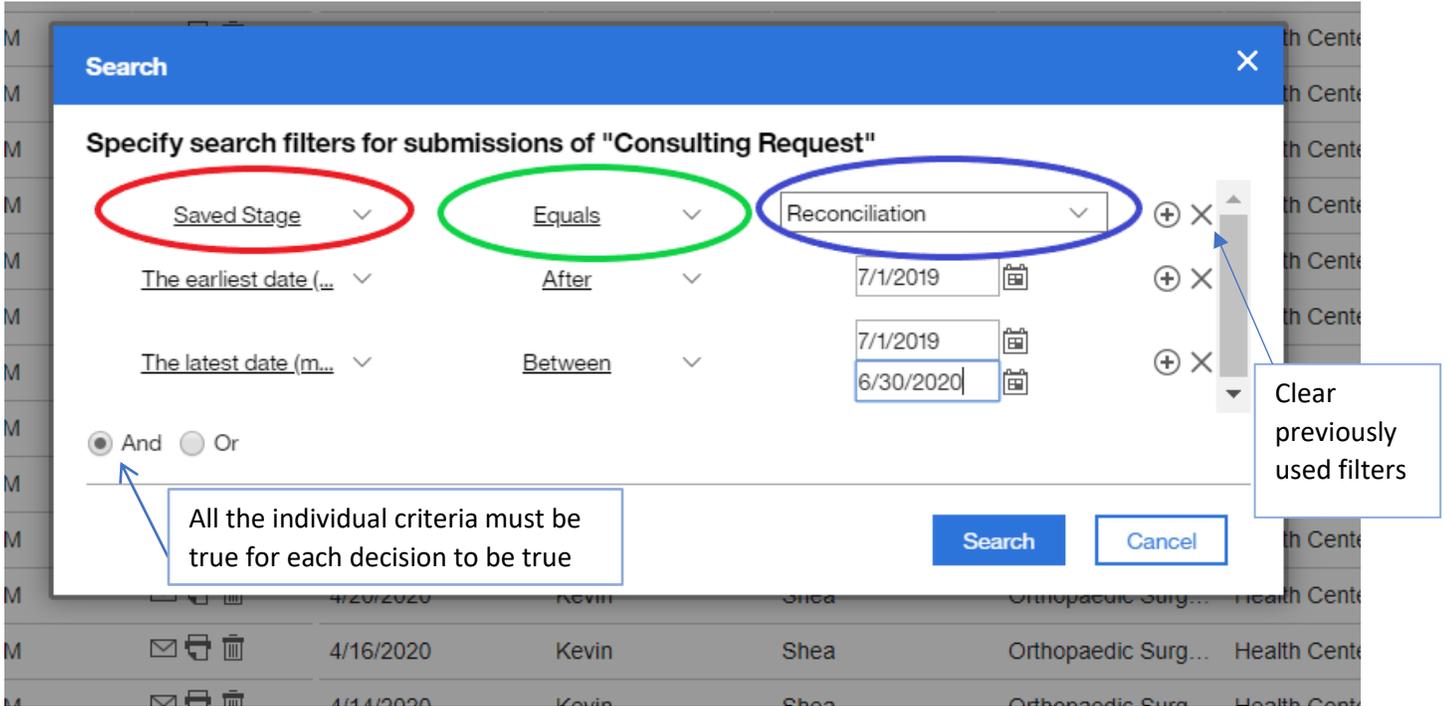


4. To apply the appropriate filters, click on **“Create Filters”** box next to the customize button:

Note: A filter is one or more logical decisions that select a subset of consulting requests. For example you can ask to see only requests between two dates, OR requests that are ready for reconciliation AND between two dates. Each logical decision will consist of TWO data items separated by a logical operator. In its result will either be true or false. When using multiple logical decisions you may choose between the set of decisions being true when each individual decision is true (using the “AND” function) or when any one of them is true (using the “OR” function).

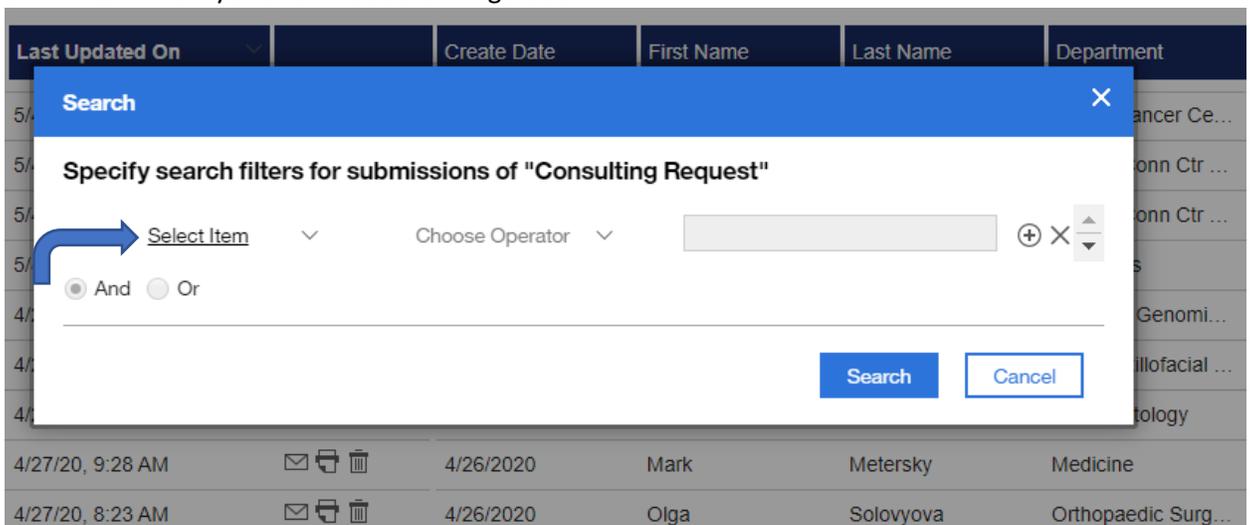


5. The simple logic rules have three parts and are formatted as seen in the image below (three columns each with its own drop down arrow):
 - 1st Column **FIELD-NAME**: The name of the one of the fields of data (see red circle)
 - 2nd Column **OPERATOR**: Defines the comparison being made. The choice of operators will change based on the type of data being considered. For text data, the operators are “equals” or “does not equal”. For dates, the operators are “before” a date, “after” a date, or “between” two dates. For numerical data, the operators are “less than”, “greater than”, “equal to”, and similar terms (see green circle).
 - 3rd Column **VALUE**: is the target you are using (see blue circle).



6. Click on the “x” icon to clear all previous filters (see image above with blue arrow)

7. After every filter has been deleted you will be asked if you would like to apply new filters, click on this text. Now you should see the image below:



- Click on the first drop down where it says "Select Item" and choose Saved Stage (see blue arrow above)
- Next where it says "Choose Operator" click on the drop down and select "Equals":

Search

Specify search filters for submissions of "Consulting Request"

Saved Stage ▾ **Choose Operator** ▾ On Behalf Attestation ▾ ⊕ ×

And Or

Search Cancel

27/20, 9:28 AM 4/26/2020 Mark Metersky Medicine

- Now click on the drop down next to where it reads "On Behalf Attestation", and choose "Reconciliation":

Search

Specify search filters for submissions of "Consulting Request"

Saved Stage ▾ Equals **On Behalf Attestation** ▾ ⊕ ×

And Or

Search Cancel

11. Your first row of Filter should read: Saved Stage, Equals, Reconciliation. Then click the addition symbol at the end of this row to insert the next row of filters.

Search

Specify search filters for submissions of "Consulting Request"

Saved Stage Equals Reconciliation

Select Item Choose Operator

And Or

Search Cancel

Last Updated On	Create Date	First Name	Last Name	Department
4/27/20, 8:23 AM	4/26/2020	Olga	Solovyova	Orthopaedic St

12. On the second row of filters, click the first drop down where it says "Select Item", then click where it says "Page 1" and look for the text that begins with the words "The earliest date (...)" and select this filter.

Search

Specify search filters for submissions of "Consulting Request"

Saved Stage Equals Reconciliation

Select Item Choose Operator

- Created By
- Last Updated By
- Created On
- Last Updated On
- Saved Stage
- Page 1
- Clone Page
- On Behalf Page

Search Cancel

Last Updated On	Create Date	First Name	Last Name	Department
4/27/20, 8:23 AM	4/26/2020	Olga	Solovyova	Orthopaedic Surg...
4/23/20, 8:23 AM	4/23/2020	David	Banach	Medicine
4/23/20, 8:23 AM	4/22/2020	Eugene	Orientele	Family Medicine

13. Now click on "Choose Operator" and select from the drop down "After":

Search

Specify search filters for submissions of "Consulting Request"

Saved Stage Equals

The earliest date (...) Choose Operator

And Or

Search Cancel

14. In the next column there should be a date field. Type in the following date with your keyboard: 7/1/2019. After you type this date in, click on the addition symbol to insert the third row of filters.

Search

Specify search filters for submissions of "Consulting Request"

Saved Stage Equals

The earliest date (...) After

Select Item Choose Operator

And Or

Search Cancel

15. Under Select Item, you are going to repeat what you selected in the last row and find from the drop down where it says "Page 1". Then scroll from the next set of filters until you find the text that begins with "The latest date(m..." and select this filter.

Search

Specify search filters for submissions of "Consulting Request"

Saved Stage + X

The earliest date (... After + X

The latest date (m... Between + X

And Or

Search Cancel

16. Now put your cursor on the next drop down and select "Between".

17. In the first date field, type in "7/1/2019". On the date field directly underneath this one type in "6/30/2020" then click search.

Search

Specify search filters for submissions of "Consulting Request"

Saved Stage + X

The earliest date (... After + X

The latest date (m... Between + X

And Or

Search Cancel

18. Now you should see all of the requests that appear in the Reconciliation stage:

Customize Create Filters Refresh Data Export Data

Click "Refresh Data" to ensure up to date information. When you click on a listed

Page 1 of 28

ID	Stage	Last Updated On		
35001	Reconciliation	5/4/20, 3:13 PM	  	5
34981	Reconciliation	5/4/20, 10:42 AM	  	5
34980	Reconciliation	5/4/20, 4:22 PM	  	5
34968	Reconciliation	5/1/20, 9:08 AM	  	4
34967	Reconciliation	5/4/20, 3:21 PM	  	4
34966	Reconciliation	4/30/20, 4:28 PM	  	4
34965	Reconciliation	5/5/20, 6:13 AM	  	4
34964	Reconciliation	5/4/20, 8:37 AM	  	4