

## QMS in the Lightning View

### In Lightning View

The User will know they're in the Salesforce Lightning View when the **9 dot** pattern is displayed on the far top left side and they will see a little hoodie person on far top right side.



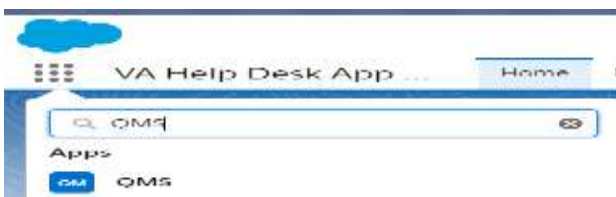
### Switch from Classic to Lightning view

When a User first logs into Salesforce it may open to the Lightning view or to the Classic view. This will be determined based on being in Lightning or Classic when they logged out of QMS. If in the Classic view, the User will need to switch from Classic to the Lightning View. This is accomplished by using the "Switch to Lightning Experience" button, found at the top and in the middle of the screen. See the below screenshot

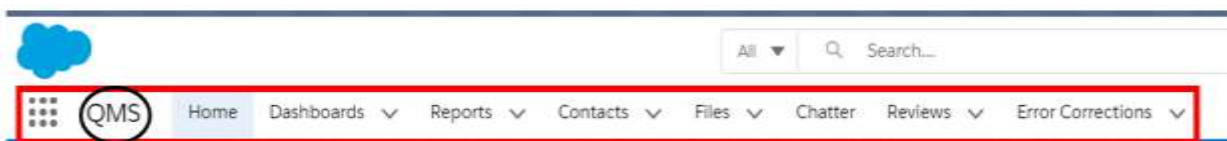


### Access to QMS

If "QMS" is not shown to the right of the 9-dot pattern, the User is not in the QMS app. Click the 9-dot pattern to open the App Launcher menu to find the QMS application. Type "QMS" in the search box and QMS will appear as a selection. Click "QMS" to open the application and connect to QMS.

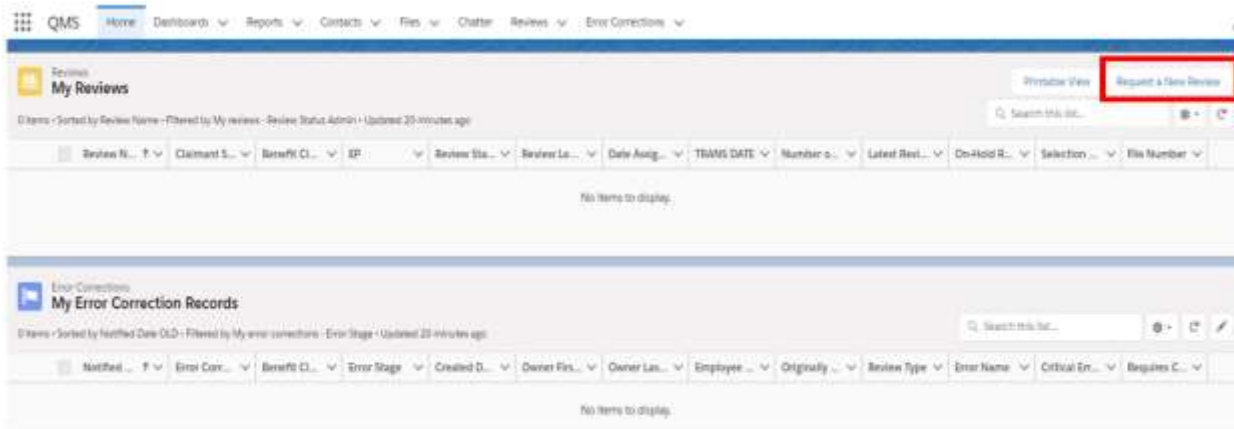


Next, "QMS" will appear next to the 9-dot pattern along with the pre-established tab set.



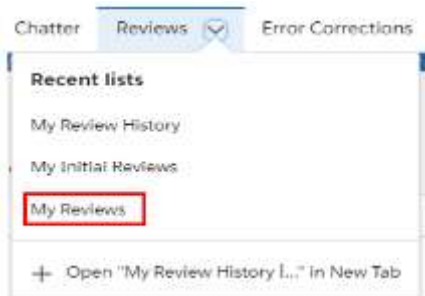
## “Home” Tab

The new “Home” screen display provides the User a view of any reviews in their review queue and Error Correction (EC) records in their queue. On the “Home” tab the User has the option to access a pending review or error correction in their view queue. They can also request a new review using the “Request a New Review” button.



## “Reviews” Tab

The User has the option to use the “Home” tab or select the “Reviews” tab to access their pending reviews. Once the “Reviews” tab is selected, a menu is opened with options of prior view selections. See the below screenshot.




## “My Reviews” View list

The “My Reviews” view is a list of a Quality Review Specialist’s (QRS) reviews in a pending status, i.e. “On-Hold”, “Assigned” or “In-process” in their queue.


The drop-down menu above, under the heading “Reviews Tab” indicates there are no reviews in the User’s queue. The menu indicates “My Review History”, “My Initial Reviews” and “My Reviews” view lists are available. Select “My Reviews” to open this view list.

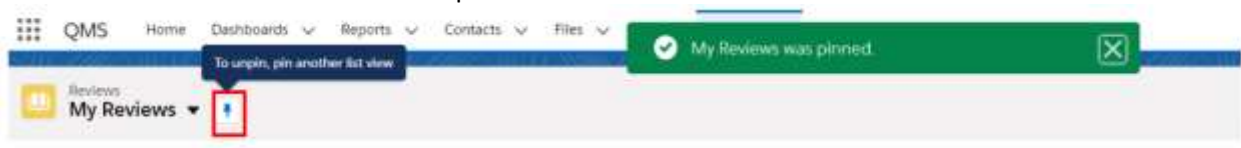


## Always open to “My Reviews” list view

The User can “Pin” the “My Review” list view to always open when the “Reviews” tab is selected, by simply clicking the pin icon  next to the My Reviews drop down.

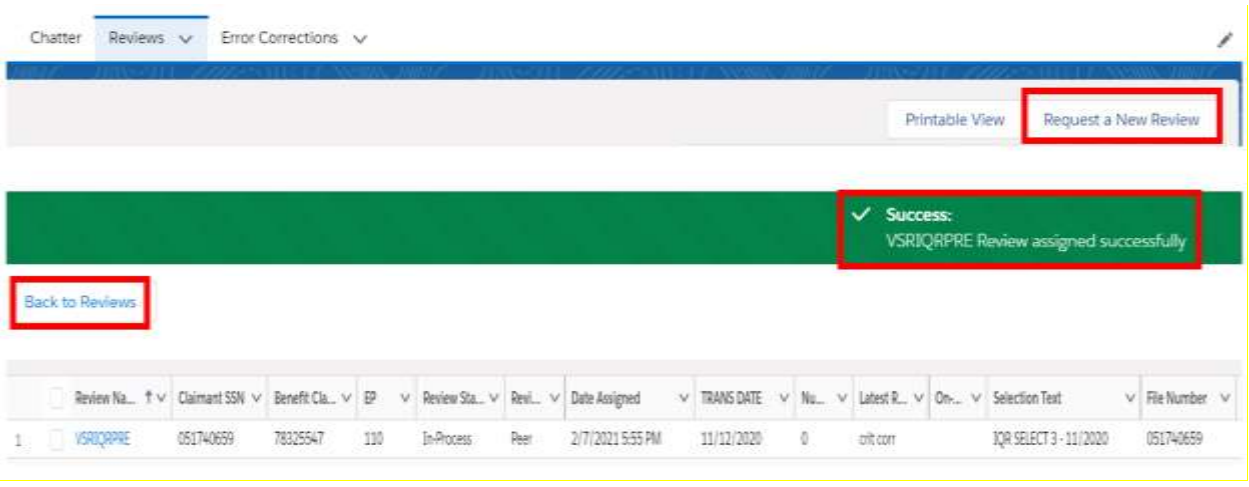


The pin icon will change position  and a message will be received confirming the view “was pinned”. This list view is now locked. Refer to the screen example below



### Select a New Review

The User will select the “Request a New Review” link and the below screen and message is displayed which confirms success “Review assigned successfully” and the “Back to Reviews” button to return to access the new review. This process has not changed from the original Classic view.



## Open a Review

As in Classic, select the “Review Name” hyper link and the “Details” page is open. See below.

The screenshot shows the 'My Reviews' page in the QMS interface. At the top, there is a navigation bar with 'QMS' and various menu items. Below the navigation bar, the page title is 'My Reviews' and there is a search bar. A table lists review entries. The first entry is highlighted with a red box and labeled 'Review Name BCID C-File#'. Below the table, there is a detailed view of the selected review. The 'Action Commands' section is highlighted with a red box and labeled 'Action Commands'. At the bottom, there are tabs for 'Details', 'Question Response', 'Error Response', and 'Error Correction'.

Some changes have been made to the next screen display, when opening a review.

1. The “My Reviews” view list remains displayed and accessible.
2. The Review Title heading displayed on the “Details” page includes the Review Name, Benefit Claim ID and C-File number.
3. The details of the review are easier to scan.

Note: The Action command buttons, navigating in the Details page and the Screens used to Perform and Submit a Review, function and are displayed the same as Classic.


**Important:** After submitting a review, the question responses on the Details page, may not be displayed and the User will need to refresh the page.

## Error Corrections

Note: The Error Correction Detail page has not changed.

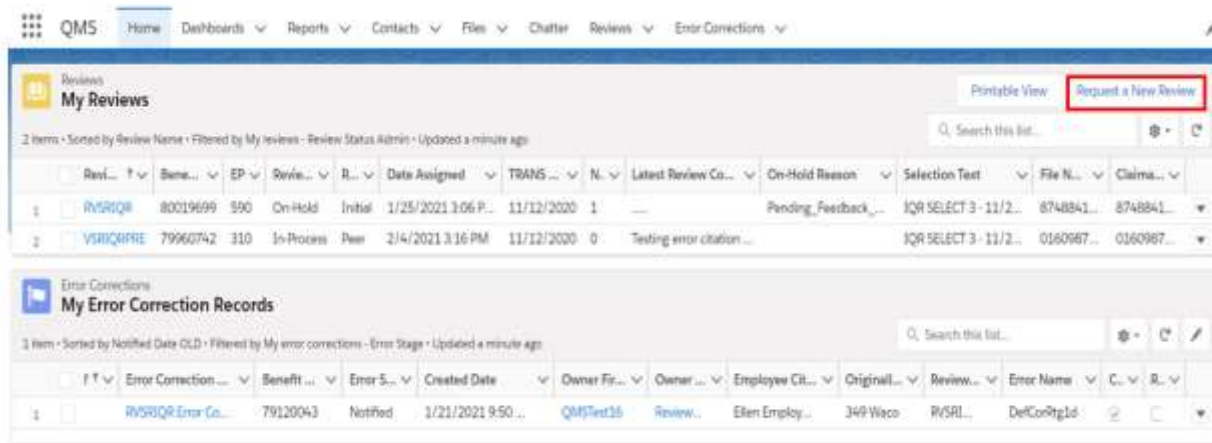
The screenshot shows the 'My Error Correction Records' page in the QMS interface. At the top, there is a navigation bar with 'QMS' and various menu items. Below the navigation bar, the page title is 'My Error Correction Records' and there is a search bar. A table lists error correction records. The first entry is highlighted with a red box.

## Index of QMS Lightning Pre-established Tabs

**Important:** The QMS Tabs are locked and preset for all QMS Users, for Reviewers, Coaches and Management. Some tabs may not be accessible based on position. The User does have the option to add Tabs and delete the Tabs they added, using the pencil icon  to customize.

### “Home” Tab (All Users)

Description: Provides the User a view of any reviews in their “My Reviews” queue and Error Correction (EC) records in their “My Error Correction Records” queue.

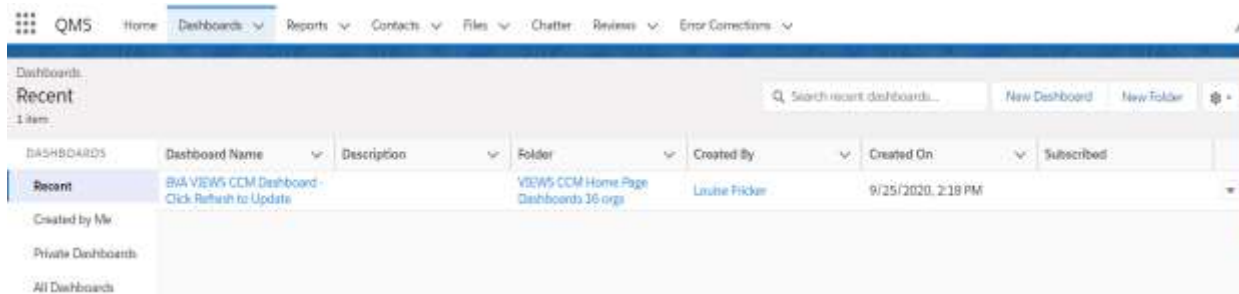


The screenshot shows the QMS Home tab interface. At the top, there is a navigation bar with 'QMS' and several menu items: Home, Dashboards, Reports, Contacts, Files, Chatter, Reviews, and Error Corrections. Below the navigation bar, there are two main sections:

- My Reviews:** This section displays a list of reviews. It includes a search bar, a 'Printable View' button, and a 'Request a New Review' button (highlighted with a red box). The table below has columns for Review ID, Beneficiary ID, EP, Review Status, R., Date Assigned, TRANS, N., Latest Review Co., On-Hold Reason, Selection Text, File N., and Claims. Two items are listed in the table.
- My Error Correction Records:** This section displays a list of error correction records. It includes a search bar and a table with columns for Error Correction ID, Beneficiary ID, Error S., Created Date, Owner Fir., Owner, Employee CR., Original, Review, Error Name, C., and R.. One item is listed in the table.

### “Dashboard” Tab (Coaches and Management)

Description: Dashboards help visually understand changing business conditions so management can make decisions based on the real-time data they have gathered with reports. Use dashboards to help identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

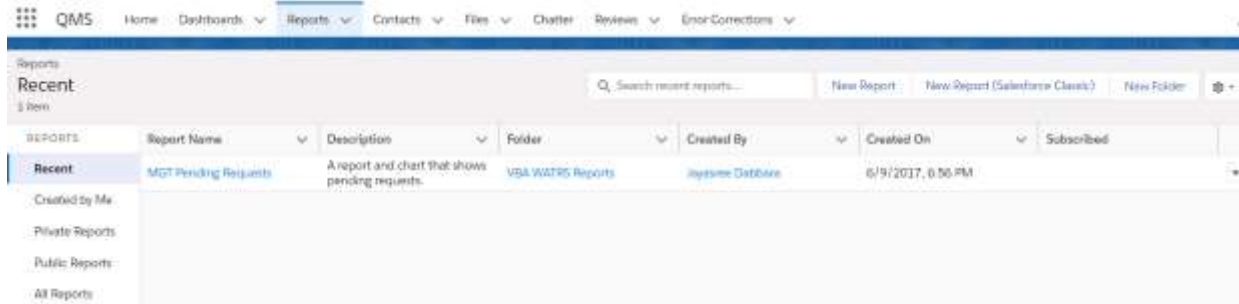


The screenshot shows the QMS Dashboards tab interface. At the top, there is a navigation bar with 'QMS' and several menu items: Home, Dashboards, Reports, Contacts, Files, Chatter, Reviews, and Error Corrections. Below the navigation bar, there is a 'Dashboards' section with a search bar and buttons for 'New Dashboard' and 'New Folder'. The main content area shows a list of dashboards with columns for Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. One dashboard is listed in the table.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	BVA VIEWS CCM Dashboard - Click Refresh to Update		VIEWS CCM Home Page Dashboards 16 orgs	Lusine Ficker	9/25/2020, 2:18 PM	

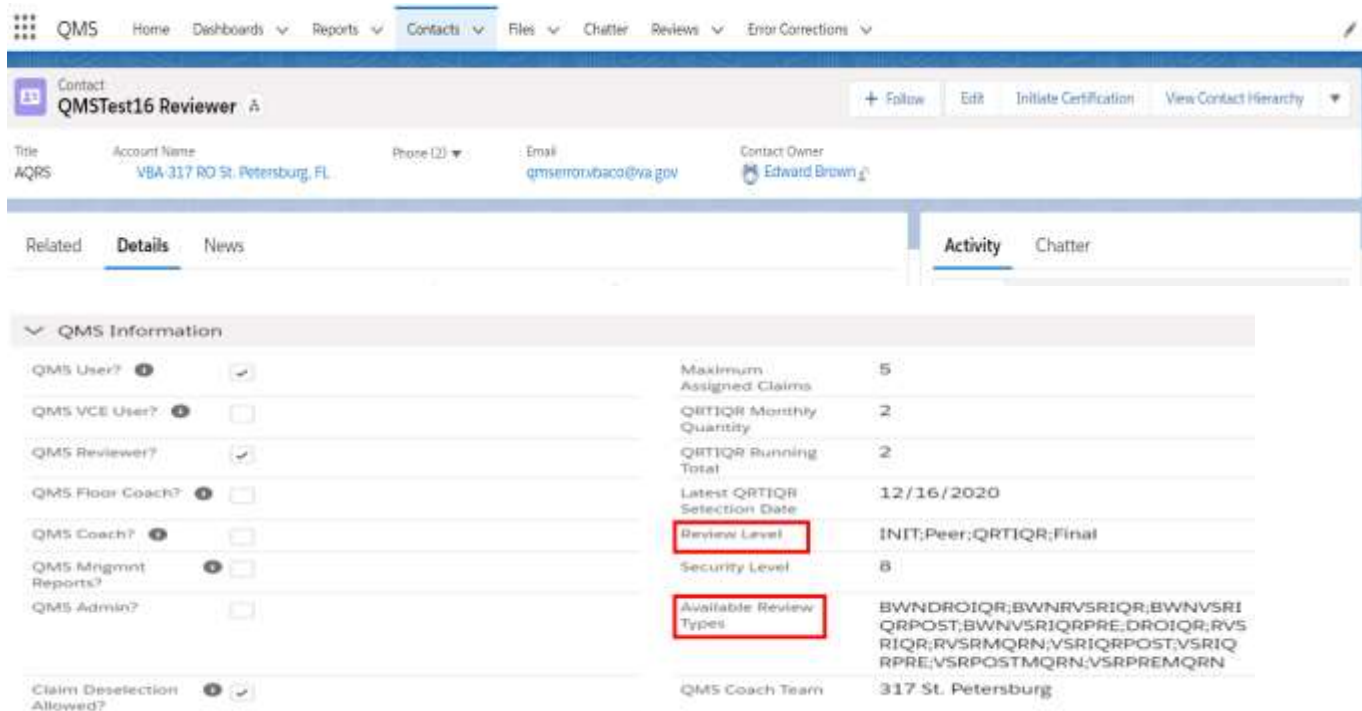
## “Reports” Tab (Coaches and Management)

Description: Reports give access to Local or National Salesforce data. A Coach or Management has the ability to examine their Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.



## “Contacts” Tab (All Users)

Description: All Users have access to their QMS Contact Detail page for changes to Review Levels and Review Types.



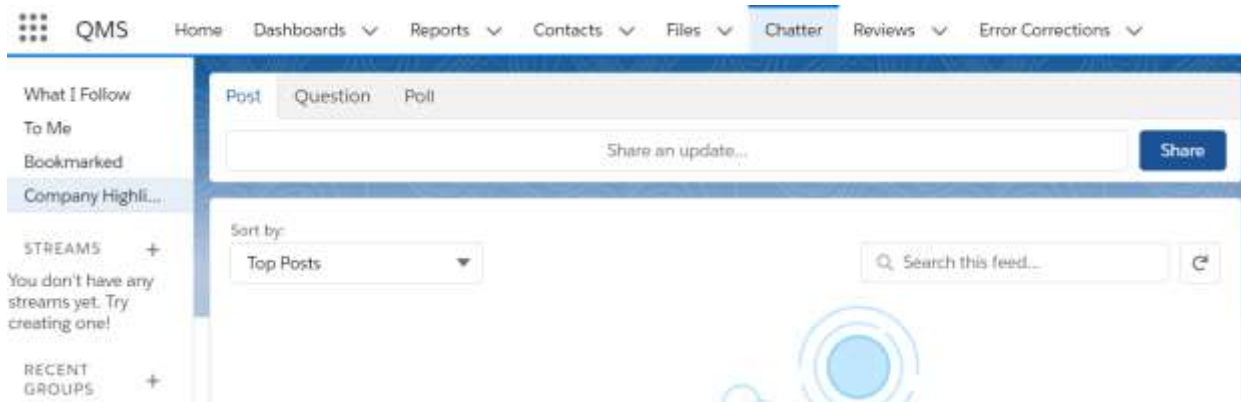
## “Files” Tab (All Users)

Description: Use Salesforce Files to share and collaborate on files, store files privately, manage version updates, and follow files that are important. Use Files Connect to connect to external file systems right from Salesforce.



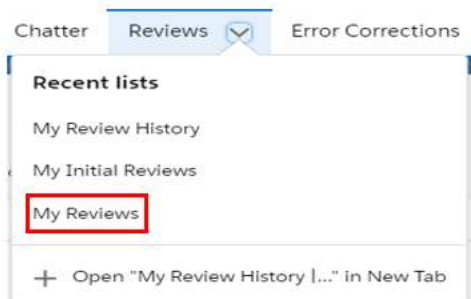
## “Chatter” Tab (All Users)

Description – A social network to communicate within selected groups to other QMS Users



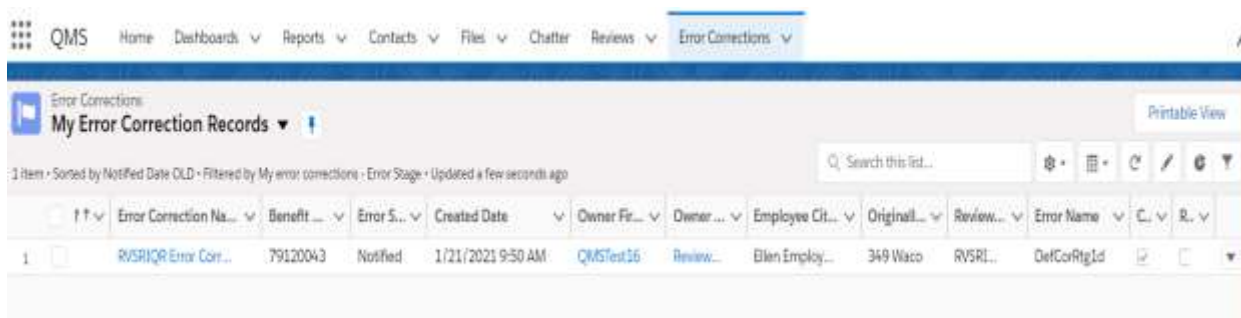
## “Reviews” Tab (All Users)

Description: Gives the option to access their pending reviews, with options of viewing prior review selections.



## “Error Correction” Tab (All Users)

Description: Gives the option to access pending Error Correction records, with options of viewing prior Error Correction selections.



The screenshot shows the 'Error Corrections' tab in a QMS application. The page title is 'My Error Correction Records'. There is a search bar and a 'Printable View' button. The table below lists error correction records with columns for Error Correction Number, Benefit, Error Stage, Created Date, Owner, Owner Firm, Employee, Original, Review, Error Name, and actions.

	Error Correction No...	Benefit ...	Error S...	Created Date	Owner Fir...	Dwner ...	Employee CH...	Original...	Review...	Error Name	C.	R.
1	RVSRIQR Error Cor...	79120043	Notified	1/21/2021 9:50 AM	QMSTest16	Review...	Ellen Employ...	349 Waco	RVSRI...	DefCoRtgId		