

**BOX STBEG**

**BOX STBEG**

**Page Order # : 5**

**BOX INSTRUCTIONS**

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( STQ1010 ) IF ((SP WAS COVERED BY A MEDICARE MANAGED CARE PLAN WITHOUT RX COVERAGE ANYTIME DURING THE CURRENT ROUND) OR (SP WAS COVERED BY A PRIVATE MANAGED CARE PLAN ANYTIME DURING THE CURRENT ROUND)) AND ((SP WAS NOT COVERED BY A MEDICARE PRESCRIPTION DRUG PLAN ANYTIME DURING THE CURRENT ROUND) AND (SP WAS NOT COVERED BY A MEDICARE PRESCRIPTION DRUG PLAN ANYTIME DURING THE PREVIOUS ROUND)) GO TO ST1 - MHMOSTMT ( STQ1030 ).

ELSE GO TO ST2 - MCSAVAIL ( STQ1080 ).

**ASSIGNMENTS**

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**TECHNICAL NOTES**

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<b>52</b>	<b>DeletedPlans</b>	Deleted plans that are not valid for displays or checks = Any PLAN where (PLAN.PLANDFLG=1/Yes or PLAN.MHMODFLG=1/Yes or PLAN.PLANHIDE=1/Yes or PLAN.LOSEPLFG ^=EMPTY) is a deleted PLAN.
<b>112</b>	<b>PlansPrivateHMO</b>	SP is covered by a Private Managed Care Plan during the current round = There is a PLAN where PLAN.PLANTYPE=4/PrivatePlan & PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM & PLRO.PLRORND=current round & PLRO.PPRVHMO=1/Yes). Exclude Deleted Plans. See T.N. 52.
<b>351</b>	<b>MPDPAnytimeCurrRnd</b>	SP covered by an MPDP plan anytime during current round = There is a PLAN where PLAN.PLANTYPE=7/MPDP & PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM & PLRO.PLRORND=current round & PLRO.COVANYTM=1/Yes). Exclude Deleted Plans. See T.N. 52.
<b>380</b>	<b>MPDPAnytimePrevRnd</b>	SP covered by an MPDP plan anytime during previous round = There is a PLAN where PLAN.PLANTYPE=7/MPDP & PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM & PLRO.PLRORND=previous round & PLRO.COVANYTM=1/Yes). Exclude Deleted Plans. See T.N. 52.
<b>381</b>	<b>MHMOAnytimeWithout Rx</b>	SP covered by MHMO without RX anytime during current round = There is a PLAN where PLANTYPE=5/MHMO & PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM & PLRO.PLRORND=current round & PLRO.COVANYTM=1/Yes & PLRO.MHMORX ^=1/Yes)). Exclude Deleted Plans. See T.N. 52.

**BOX STBEG**

**362 PrivHMOAnytime**

SP covered by Private Managed Care Plan anytime during current round =  
There is a PLAN where PLANTYPE=4/PrivatePlan & PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM & PLRO.PLRORND=current round & PLRO.PPRVHMO=1/Yes)).  
Exclude Deleted Plans. See T.N. 52.

**DESIGN NOTES**

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**ST1**

Page Order # : 30

Design Screen Type: Code 1

Fields: Field 1: MHMOSTMT

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

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**Context header display:****Question display:**

If previous round HRND.MHMOSTMT = DK, RF or EMPTY, then:  
 Display "[Do you/Does (SP)] usually receive any statements or papers..."  
 MANAGED CARE PLAN NAME:  
 If SP has a Current Medicare Managed Care plan, display name of current Medicare Managed Care Plan.  
 Else display name of (one of) SP's Private Managed Care plan(s).

Else then:  
 Display "Last time, we recorded that...".  
 If previous round HRND.MHMOSTMT = 1/Always, display "always".  
 Else if previous round HRND.MHMOSTMT = 2/Sometimes, display "sometimes".  
 Else display "never".

If previous round HRND.MHMOSTMT ^= empty, display "currently"  
 Else do not display.

If respondent is SP, display "you always receive statements, sometimes receive statements, or never receive statements".  
 Else display "(SP) always receives statements, sometimes receives statements, or never receives statements".

**Multi Field display:**

**Roster/Grid Instructions:**

**Roster/Grid display:**

**Report display:**

**TEXT:** -----

**Context Header:**

**Int. Instr I:**

**Question Text:**

Now that we have finished talking about medical visits and prescribed medicines, let's talk about [your/(SP's)] medical costs. We should start by looking at any paperwork or written explanations of what was paid by Medicare, any insurance company, or TRICARE.

[Do you/Does (SP)] usually receive any statements or papers from Medicare, insurance, such as (MANAGED CARE PLAN NAME), or TRICARE that show the charges for medical visits or equipment?/Last time, we recorded that [you/(SP)] (always/sometimes/never) received statements or papers from Medicare, insurance, or TRICARE that show the charges for medical visits or equipment.]

Please tell me if (currently) [you always receive statements, sometimes receive statements, or never receive statements/(SP) always receives statements, sometimes receives statements, or never receives statements].

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

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**Field1:** MHMOSTMT ( STQ1030 )

**Cheshire Name:** HRND.MHMOSTMT

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TSt1ahmo

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	Always	ST2 - MCSAVAIL ( STQ1080 )
	<b>English text:</b> ALWAYS	
2	Sometimes	ST2 - MCSAVAIL ( STQ1080 )
	<b>English text:</b> SOMETIMES	
3	Never	BOX STEND - (STQ3010 )
	<b>English text:</b> NEVER	

Attribute	Route
Don't know	ST2 - MCSAVAIL ( STQ1080 )
Refusal	ST2 - MCSAVAIL ( STQ1080 )

#### BACKGROUND VARIABLE ASSIGNMENTS

#### SOFT EDIT CHECKS

#### HARD EDIT CHECKS

#### TECHNICAL NOTES

52	<b>DeletedPlans</b>	Deleted plans that are not valid for displays or checks = Any PLAN where (PLAN.PLANDFLG=1/Yes or PLAN.MHMODFLG=1/Yes or PLAN.PLANHIDE=1/Yes or PLAN.LOSEPLFG ^=EMPTY) is a deleted PLAN.
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65	<b>MHMOCurrent</b>	SP has a current Medicare Managed Care plan = There is a PLAN where PLAN.PLANTYPE=5/MHMO & PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM & PLRO.PLRORND=current round & PLRO.COVCURNT=1/Yes). Exclude Deleted Plans. See T.N. 52.
112	<b>PlansPrivateHMO</b>	SP is covered by a Private Managed Care Plan during the current round = There is a PLAN where PLAN.PLANTYPE=4/PrivatePlan & PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM & PLRO.PLRORND=current round & PLRO.PPRVHMO=1/Yes). Exclude Deleted Plans. See T.N. 52.
106	<b>HIPlanName</b>	Health Insurance Plan Roster is stored on PLAN. Plan name = PLAN.PLNAME.
4	<b>Respondent</b>	On MRES where MRES.MRESRND = current round:  A Proxy interview (respondent is a proxy) = MRES.SPPROXY=2/Proxy. MRES.RROSTNUM=ROST.ROSTNUM of respondent.  An SP interview (respondent is the SP) = MRES.SPPROXY=1/SP. MRES.RROSTNUM='01'.

**DESIGN NOTES**

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**ST2**

Page Order # : 80

Design Screen Type: Yes/No

Fields: Field 1: MCSAVAIL

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

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**Context header display:**

**Question display:** If ST1 - MHMOSTMT = empty, display first paragraph "Now that we..."  
Else do not display.

If this is not SP's first community interview, display "that [you/(SP)] received since the last interview".  
Else do not display.

If SP has a "current" Medicare Prescription Drug plan or there was a Medicare Prescription Drug plan "current" at the time of the previous round interview, then display "[PROBE IF NECESSARY: Please...]".  
Else do not display.

**Multi Field display:****Roster/Grid Instructions:****Roster/Grid display:****Report display:****TEXT:**

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**Context Header:**



**Int. Instr I:**

**Question Text:** [Now that we have finished talking about medical visits and prescribed medicines, let's talk about [your/(SP's)] medical costs. We should start by looking at any paperwork or written explanations of what costs were paid by Medicare, any insurance company, or TRICARE.]

Do you have any statements or paper from Medicare, insurance, or TRICARE [that [you/(SP)] received since the last interview]?

[PROBE IF NECESSARY: Please include any statements received about [your/(SP's)] Medicare prescription drug benefit.]

**Int. Instr II:****INPUT FIELDS / ROUTING**

**Field1:** MCSAVAIL ( STQ1080 )

**Cheshire Name:** HRND.MCSAVAIL

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated  
**Type Name:** TYesNoDKRF  
**Answers Allowed:** 1  
**Drop Down List:** No  
**Lookup File:** No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:**  
**Max Value:**  
**Mask:**

Number	Label	Route
1	Yes	ST3 - STHIREP ( STQ1107 )
	<b>English text:</b> YES	
2	No	BOX STEND - (STQ3010 )
	<b>English text:</b> NO	
Attribute	Route	
Don't know	BOX STEND - (STQ3010 )	
Refusal	BOX STEND - (STQ3010 )	

**BACKGROUND VARIABLE ASSIGNMENTS****SOFT EDIT CHECKS**

**HARD EDIT CHECKS**

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**TECHNICAL NOTES**

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**126**      **FirstCommunity**      If this is SP's first community interview =  
(MRES.INTTYPE=2/NewFromFacility or  
MRES.INTTYPE=3/NewFromSupplement) on MRES  
where MRES.MRESRND = current round.

**DESIGN NOTES**

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**ST3**

Page Order # : 90

Design Screen Type: No Entry

Fields: Field 1: STHIREP

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

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Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display: Display report below question text.

Display all insurance plans SP reported being covered by in the current round or in the previous round in the following order:

First line:

If SP was covered by a Medicare Managed care plan, display name of this Medicare Managed care plan.

Else display "MEDICARE" for the Medicare plan.

Next list Medicaid, Tricare, all Public Plans, all Private Plans and all Medicare Prescription Drug Plans. If there is more than one plan of any type, display in order of entry.

Report header: PLANS DISCUSSED AT THIS POINT OF THE INTERVIEW

Report layout:

Column 1, header="Plan Name", display PLAN.PLNAME.

Column 2, header="Plan Type", display PLAN.PLANTYPE:

If PLANTYPE=1/Medicare, display "(MCAR)".  
 If PLANTYPE=2/Medicaid, display "(MCAD)".  
 If PLANTYPE=3/PublicPlan, display "(PUBL)".  
 If PLANTYPE=4/PrivatePlan, display "(PRIV)".  
 If PLANTYPE=5/MHMO, display "(MHMO)".  
 If PLANTYPE=6/Tricare, display "(TRIC)".  
 If PLANTYPE=7/MPDP, display "(MPDP)".

**TEXT:**

**Context Header:** SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
 TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

**Int. Instr I:** BASED ON THE INFORMATION RECORDED IN THE HEALTH  
 INSURANCE SECTION FOR RECENT ROUNDS, THE PLAN(S)  
 LISTED BELOW ARE THE SOURCES OF STATEMENTS YOU  
 MIGHT EXPECT TO FIND FOR THIS SP.

**Question Text:**

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

**Field1:** STHIREP ( STQ1107 )

**Cheshire Name:**

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

<b>Field Type:</b>	Enumerated	<b>FieldSize:</b>
<b>Type Name:</b>	TContinueEMPTY	<b>Min Value:</b>
<b>Answers Allowed:</b>	1	<b>Max Value:</b>
<b>Drop Down List:</b>	No	<b>Mask:</b>
<b>Lookup File:</b>	No	
<b>Lookup File Name:</b>		

Number	Label	Route
1	Continue	ST4 - MATCHST ( STQ1110 )
English text: CONTINUE		

Attribute	Route
Empty	ST4 - MATCHST ( STQ1110 )

**BACKGROUND VARIABLE ASSIGNMENTS**

**SOFT EDIT CHECKS**

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**HARD EDIT CHECKS**

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**TECHNICAL NOTES**

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<b>144</b>	<b>PlanCurrPrevRnd</b>	Plan was "current" at the time of prev. round interview = For this PLAN, there is a PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM & PLRO.PLRORND=previous round & (COVTIME=1/WholeTime or COVNOW=1/Yes or COVCURNT=1/Yes)). Exclude Deleted Plans. See T.N. 52.
<b>145</b>	<b>PlanCoveredPrevRnd</b>	SP covered by PLAN anytime during prev.round = There is a PLAN where PLAN.PLANTYPE ^= 1/Medicare & PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM & PLRO.PLRORND=prev. round & (PLRO.COVTIME ^= empty or PLRO.COVANYTM=1/Yes)). Exclude Deleted Plans. See T.N. 52.
<b>52</b>	<b>DeletedPlans</b>	Deleted plans that are not valid for displays or checks = Any PLAN where (PLAN.PLANDFLG=1/Yes or PLAN.MHMODFLG=1/Yes or PLAN.PLANHIDE=1/Yes or PLAN.LOSEPLFG ^=EMPTY) is a deleted PLAN.

**DESIGN NOTES**

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**ST4**

Page Order # : 110

Design Screen Type: No Entry

Fields: Field 1: MATCHST

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

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**Context header display:**

**Question display:** If this is the first time ST4 is asked in the current round, display "MATCH UP MEDICARE INSURANCE, AND TRICARE STATEMENTS BY PROVIDER AND DATE OF SERVICE." Else display "PRESS ENTER TO CONTINUE TO THE NEXT (STATEMENT/BUNDLE)." in interviewer instructions.

Always display "(STATEMENT/BUNDLE)", "(MHMO)", "(MPDP)" in parenthesis.

If SP had a Medicare Prescription Drug plan or MHMO plan at any time in the current or previous round, display "SELECT..." for Interviewer Instruction 2. Else do not display.

**Multi Field display:****Roster/Grid Instructions:****Roster/Grid display:****Report display:****TEXT:**

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**Context Header:** SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

**Int. Instr I:** [MATCH UP MEDICARE, INSURANCE, TRICARE, AND MEDICARE PRESCRIPTION BENEFIT STATEMENTS BY PROVIDER AND DATE OF SERVICE./PRESS ENTER TO CONTINUE TO THE NEXT (STATEMENT/BUNDLE).]

**Question Text:**

**Int. Instr II:** [SELECT "MEDICARE PRESCRIPTION DRUG BENEFIT STATEMENT" AT THE NEXT SCREEN FOR ALL STATEMENTS FROM THE SP'S "(MHMO)" PLAN OR "(MPDP)" PLAN THAT REPORT PRESCRIPTION DRUG CLAIMS.]

**INPUT FIELDS / ROUTING**

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**Field1:** MATCHST ( STQ1110 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

<b>Field Type:</b>	Enumerated	<b>FieldSize:</b>	
<b>Type Name:</b>	TContinueEMPTY	<b>Min Value:</b>	
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	
<b>Drop Down List:</b>	No	<b>Mask:</b>	
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

Number	Label	Route
1	Continue	ST5 - ST_CHARGEBUNDLE ( STQ1120 )
English text: CONTINUE		

Attribute	Route
Empty	ST5 - ST_CHARGEBUNDLE ( STQ1120 )

**BACKGROUND VARIABLE ASSIGNMENTS**

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**SOFT EDIT CHECKS**

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**HARD EDIT CHECKS**

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**TECHNICAL NOTES**

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**ST5**

Page Order # : 120

Design Screen Type: Roster

Fields: Field 1: ST\_CHARGEbundle

Enable Functions:	<b>HELP</b>	No
	<b>COMMENTS</b>	Yes
	<b>JUMPBACK</b>	Yes

Roster Name: Statement Charge Bundle

Roster Type: Single Item Select

Roster Functions:	<b>Add Item</b>	Yes	Display as ' Add Charge Bundle '
	<b>Edit Item</b>	Yes	Display as ' Edit Charge Bundle '
	<b>Delete Item</b>	No	
	<b>Search Item</b>	No	

Grid Functions:	<b>Add Line</b>	No
	<b>Delete Line</b>	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:****Question display:** Always display "(S)" in interviewer instructions in parenthesis.

If this is the first time ST5 is asked in the current round, display "FIRST".

Else display "NEXT" in Interviewer Instructions.

**Multi Field display:****Roster/Grid Instructions:** Display all current round Charge Bundles already entered in the Statement Series.

Display in order of entry.

Display all loaded Charge Bundles as protected rows.

Note: Completed Charge Bundles loaded at ST5 should be protected and not preselected. The interviewer must add a new charge bundle at ST5 before being able to continue. The interviewer should not be able to select an existing charge bundle and make updates to the charges already collected.

**Roster/Grid display:**

COL #	HEADER	INSTRUCTIONS
1	Bundle #	Display COST.COSTNUM.
2	Statement Source(s)	Display COST.STATTYPE response text.

**ST5**

<b>3</b>	MSN Claim Type	Display COST.MCARTYPE response text.
<b>4</b>	Claim Control #  MSN	Display "Claim Control #" above columns 4,5,6.  If (COSA.MSNCLNUM ^= empty and COSA.MSNCLNUM ^= DK), display first five digits of COSA.MSNCLNUM. Else if COSA.MSNCLNUM = DK, display "DK". COSA.MSNCLNUM. Else do not display.
<b>5</b>	INS	If (COST.INSCLNUM ^= empty and COST.INSCLNUM ^= DK), display first five digits of COST.INSCLNUM. Else if COST.INSCLNUM = DK, display "DK". Else do not display.
<b>6</b>	TRI	If (COST.TRICLNUM ^= empty and COST.TRICLNUM ^= DK), display first five digits of COST.TRICLNUM. Else if COST.TRICLNUM = DK, display "DK". Else do not display.
<b>7</b>	MPD BEGIN DATE	Display (MPDP SERVICE START DATE)

**Report display:**

**TEXT:** -----

**Context Header:** SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

**Int. Instr I:** ADD THE SOURCE(S) AND TYPE OF STATEMENT(S) FOR THE  
(FIRST/NEXT) BUNDLE OF EVENTS.

**Question Text:**

**Int. Instr II:** ADD ONE CHARGE BUNDLE AT THIS ROSTER.

**INPUT FIELDS / ROUTING**

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**Field1:** ST\_CHARGEBUNDLE ( STQ1120 )

**Cheshire Name:** TEMP

**Item Text display:** Display "AND" in all response options in BOLD.

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** String **FieldSize:** 135  
**Type Name:** TCOSTPICK135 **Min Value:**  
**Answers Allowed:** 1 **Max Value:**  
**Drop Down List:** No **Mask:**  
**Lookup File:** No  
**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	BOX ST5 - (STQ1125 )

**BACKGROUND VARIABLE ASSIGNMENTS**

Charge Bundle details will be collected on COST and CORO:  
 COST key = COST.COSTBASE + COST.COSTNUM  
 COST.COSTNUM = Number of charge bundle generated at ST5.

For charge bundles added, see STATEMENT CHARGE BUNDLE POP-UP specifications for pop-up window programming instructions.

Variables populated:

COST.COSTNUM Charge Bundle COST Number  
 COST.COSTRND Current Round  
 COST.COSTTYPE 1/ST  
 COST.MCREDPCT 0  
 COST.STATTYPE Statement Type  
 COST.MCARTYPE MSN Type  
 CORO.COROCOST Charge Bundle COST number  
 CORO.CORORND Current Round  
 CORO.COROTYPE 1/ST  
 CORO.TOTALTYP 1/TotalCharge, if COST.MCARTYPE ^= 6/MSNPartInpatient  
 BASE.LASTCOST Highest COST.COSTNUM.

**SOFT EDIT CHECKS**

**HARD EDIT CHECKS**

**TECHNICAL NOTES**

**52 DeletedPlans Deleted plans that are not valid for displays or checks =**

**ST5**

		Any PLAN where (PLAN.PLANDFLG=1/Yes or PLAN.MHMODFLG=1/Yes or PLAN.PLANHIDE=1/Yes or PLAN.LOSEPLFG ^=EMPTY) is a deleted PLAN.
<b>250</b>	<b>CurrentChargeBundles</b>	Current Round Charge Bundles entered in Statement Series = There is a COST where COST.COSTRNDC = current round and COST.COSTTYPE = 1/ST.
<b>261</b>	<b>NeverInsurancePlan</b>	SP never had a health insurance plan other than Medicare or Tricare = There is no PLAN where (PLAN.PLANTYPE = 2/Medicaid, 3/PublicPlan, or 4/PrivatePlan). Exclude Deleted Plans. See T.N. 52.
<b>262</b>	<b>NeverTricare</b>	SP never had a Tricare plan = There is no PLAN where PLAN.PLANTYPE = 6/Tricare. Exclude Deleted Plans. See T.N. 52.

**DESIGN NOTES**

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ST5 is called from NS and CPS when SP reports having a statement.

# BOX ST5

## BOX INSTRUCTIONS

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( STQ1125 ) IF ST5 - STATTYPE = 1/Medicare, 3/MedicareAndInsurance,  
5/MedicareAndTricare, OR 7/MedicareAndTricareAndInsurance, GO TO ST7 -  
MSNCLNUM ( STQ1190 ).

ELSE IF ST5 - STATTYPE = 2/Insurance OR 6/TricareAndInsurance, GO TO  
ST10 - INSCLNUM ( STQ1330 ).

ELSE IF ST5 - STATTYPE = 4/Tricare ST11 - TRICLNUM ( STQ1350 ).

ELSE GO TO ST11B - PDPBEGMM ( STQ1354 ).

## ASSIGNMENTS

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## TECHNICAL NOTES

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## DESIGN NOTES

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**ST7**

Page Order # : 150

Design Screen Type: Text

<b>Fields:</b>	<b>Field 1:</b>	<b>MSNCLNUM</b>
	<b>Field 2:</b>	<b>MSNCLNM2</b>
	<b>Field 3:</b>	<b>MSNCLNM3</b>
	<b>Field 4:</b>	<b>MSNCLNM4</b>
	<b>Field 5:</b>	<b>MSNCLNM5</b>

<b>Enable Functions:</b>	<b>HELP</b>	No
	<b>COMMENTS</b>	Yes
	<b>JUMPBACK</b>	Yes

Roster Name:

Roster Type:

<b>Roster Functions:</b>	<b>Add Item</b>	No
	<b>Edit Item</b>	No
	<b>Delete Item</b>	No
	<b>Search Item</b>	No

<b>Grid Functions:</b>	<b>Add Line</b>	No
	<b>Delete Line</b>	No

**DISPLAY INSTRUCTIONS:**

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**Context header display:****Question display:** Always display "(MSN)" and "(S)" in interviewer instructions in parenthesis.**Multi Field display:** Vertical Alignment  
Display all fields at one time.**Roster/Grid Instructions:****Roster/Grid display:****Report display:****TEXT:**

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**Context Header:****Int. Instr I:** ENTER UP TO FIVE CLAIM CONTROL NUMBERS FROM THE MEDICARE SUMMARY NOTICE (MSN) ASSOCIATED WITH ONE CLAIM TOTAL.

IF NO CLAIM CONTROL NUMBER(S) LISTED, ENTER "DON'T

KNOW".

**Question Text:**

**Int. Instr II:** DO NOT ENTER ANY CLAIM CONTROL NUMBERS IN COMMENTS.

**INPUT FIELDS / ROUTING**

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**Field1:** MSNCLNUM ( STQ1190 )

**Cheshire Name:** COSA.MSNCLNUM

ST7 claim numbers are stored on one record in SQL and then transformed to multiple records on COSA in Cheshire.

SQL field = tblCOST.MSNCLNUM

**Item Text display:**

**Item Text:**

**Label:** MSN CLAIM CONTROL NUMBER:  
**Label Position:** Left

**Field Type:** String **FieldSize:** 63  
**Type Name:** TMSNCLNUM **Min Value:**  
**Answers Allowed:** 1 **Max Value:**  
**Drop Down List:** No **Mask:**  
**Lookup File:** No  
**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	ST7 - MSNCLNM2 ( STQ1200 )

Attribute	Route
Don't know	ST7 - MSNCLNM2 ( STQ1200 )

**Field2:** MSNCLNM2 ( STQ1200 )

**Cheshire Name:** COSA.MSNCLNM2

ST7 claim numbers are stored on one record in SQL and then transformed to multiple records on COSA in Cheshire.

SQL field = tbICOST.MSNCLNM2

**Item Text display:**

**Item Text:**

**Label:** MSN CLAIM CONTROL NUMBER:  
**Label Position:** Left

**Field Type:** String **FieldSize:** 63  
**Type Name:** TMSNCLNM2 **Min Value:**  
**Answers Allowed:** 1 **Max Value:**  
**Drop Down List:** No **Mask:**  
**Lookup File:** No  
**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	ST7 - MSNCLNM3 ( STQ1210 )

Attribute	Route
Empty	BOX ST7 - (STQ1240 )

Don't know	ST7 - MSNCLNM3 ( STQ1210 )
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**Field3:** MSNCLNM3 ( STQ1210 )

**Cheshire Name:** COSA.MSNCLNM3

ST7 claim numbers are stored on one record in SQL and then transformed to multiple records on COSA in Cheshire.

SQL field = tbICOST.MSNCLNM3

**Item Text display:**

**Item Text:**

**Label:** MSN CLAIM CONTROL NUMBER:

**Label Position:** Left

**Field Type:** String

**FieldSize:** 63

**Type Name:** TMSNCLNM2

**Min Value:**

**Answers Allowed:** 1

**Max Value:**

**Drop Down List:** No

**Mask:**

**Lookup File:** No

**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	ST7 - MSNCLNM4 ( STQ1220 )

Attribute	Route
Empty	BOX ST7 - (STQ1240 )

Don't know	ST7 - MSNCLNM4 ( STQ1220 )
------------	----------------------------

**Field4:** MSNCLNM4 ( STQ1220 )

**Cheshire Name:** COSA.MSNCLNM4

ST7 claim numbers are stored on one record in SQL and then transformed to multiple records on COSA in Cheshire.

SQL field = tbICOST.MSNCLNM4

**Item Text display:**

**Item Text:**

**Label:** MSN CLAIM CONTROL NUMBER:

**Label Position:** Left

**Field Type:** String

**FieldSize:** 63

**Type Name:** TMSNCLNM2

**Min Value:**

**Answers Allowed:** 1

**Max Value:**

**Drop Down List:** No

**Mask:**

**Lookup File:** No

**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	ST7 - MSNCLNM5 ( STQ1230 )

Attribute	Route
Empty	BOX ST7 - (STQ1240 )

Don't know	ST7 - MSNCLNM5 ( STQ1230 )
------------	----------------------------

**Field5:** MSNCLNM5 ( STQ1230 )

**Cheshire Name:** COSA.MSNCLNM5

ST7 claim numbers are stored on one record in SQL and then transformed to multiple records on COSA in Cheshire.

SQL field = tbICOST.MSNCLNM5

**Item Text display:**

**Item Text:**

**Label:** MSN CLAIM CONTROL NUMBER:

**Label Position:** Left

**Field Type:** String

**FieldSize:** 63

**Type Name:** TMSNCLNM2

**Min Value:**

**Answers Allowed:** 1

**Max Value:**

**Drop Down List:** No

**Mask:**

**Lookup File:** No

**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	BOX ST7 - (STQ1240 )

Attribute	Route
Empty	BOX ST7 - (STQ1240 )

Don't know	BOX ST7 - (STQ1240 )
------------	----------------------

**BACKGROUND VARIABLE ASSIGNMENTS**

**COSARNDC** COST.COSARNDC = current round. This is set in SQL only in order to flag data transformation to generate new COSA records.

**SOFT EDIT CHECKS**

**HARD EDIT CHECKS**

Edit #1:  
 For each MSN CLAIM NUMBER entered at ST7, if (CLAIM NUMBER ^= DK and ^= RF), CLAIM NUMBER entered should ^= any other CLAIM NUMBER already entered at ST7.  
 If not true, display message "NUMBER HAS ALREADY BEEN ENTERED. PLEASE REENTER CLAIM CONTROL NUMBER."

Edit #2:  
 For each MSN CLAIM NUMBER entered at ST7, if (CLAIM NUMBER ^= DK and ^= RF), CLAIM NUMBER entered should be a minimum of twelve characters in length.

**ST7**

If not true, display message "INVALID RESPONSE. ENTRY NOT IN RANGE. PLEASE REENTER."

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

MSNCLNUM is the only required field. The remaining fields are specified to allow EMPTY and are not required.

# **BOX ST7**

## **BOX INSTRUCTIONS**

---

( STQ1240 ) IF ST7 - MSNCLNUM = DK, GO TO BOX ST9 - (STQ1320 ).  
ELSE GO TO ST8 - MSCLVER1 ( STQ1270 ).

## **ASSIGNMENTS**

---

## **TECHNICAL NOTES**

---

## **DESIGN NOTES**

---

# ST8

Design Screen Type: Text

Fields: Field 1: MSCLVER1

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display: Always display "(MSN)" in interviewer instructions in parenthesis.

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header:

Int. Instr I: PLEASE ENTER THE FIRST CLAIM CONTROL NUMBER FROM THE MEDICARE SUMMARY NOTICE (MSN) AGAIN.

Question Text:

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:** MSCLVER1 ( STQ1270 )

**Cheshire Name:** COSA.MSCLVER1

ST7 claim numbers are stored on one record in SQL and then transformed to multiple records on COSA in Cheshire.

SQL field = tblCOST.MSCLVER1

**Item Text display:**

**Item Text:**

**Label:** MSN CLAIM CONTROL NUMBER:

**Label Position:** Left

**Field Type:** String

**FieldSize:** 63

**Type Name:** TTEMPCLNUM

**Min Value:**

**Answers Allowed:** 1

**Max Value:**

**Drop Down List:** No

**Mask:**

**Lookup File:** No

**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	BOX ST8 - (STQ1290 )

---

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

**Edit #1**

IF (ST8 - MSCLVERR1 ^= DK and ^= RF), ST8 - MSCLVER1 should ^= any other CLAIM NUMBER already entered at ST7. If not true, display message "NUMBER HAS ALREADY BEEN ENTERED. PLEASE REENTER CLAIM CONTROL NUMBER."

**Edit #2:**

If (ST8 - MSCLVER1 ^= DK and ^= RF), ST8 - MSCLVER1 should be a minimum of twelve characters in length. If not true, display message "INVALID RESPONSE. ENTRY NOT IN RANGE. PLEASE REENTER."

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

# **BOX ST8**

**Page Order # :** 190

## **BOX INSTRUCTIONS**

---

( STQ1290 ) IF ST8 - MSCLVER1 MATCHES ST7 - MSNCLNUM, GO TO BOX ST9 - (STQ1320 ).  
ELSE GO TO ST9 - WHICHNUM ( STQ1310 ).

## **ASSIGNMENTS**

---

## **TECHNICAL NOTES**

---

## **DESIGN NOTES**

---



**ST9**

Page Order # : 210

Design Screen Type: Code 1

<b>Fields:</b>	<b>Field 1:</b>	<b>WHICHNUM</b>
	<b>Field 2:</b>	<b>NEWCLNUM</b>

<b>Enable Functions:</b>	<b>HELP</b>	No
	<b>COMMENTS</b>	Yes
	<b>JUMPBACK</b>	Yes

Roster Name:

Roster Type:

<b>Roster Functions:</b>	<b>Add Item</b>	No
	<b>Edit Item</b>	No
	<b>Delete Item</b>	No
	<b>Search Item</b>	No

<b>Grid Functions:</b>	<b>Add Line</b>	No
	<b>Delete Line</b>	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:**

**Question display:** FIRST MSN CLAIM CONTROL NUMBER: Display ST7 - MSNCLNUM.

SECOND MSN CLAIM CONTROL NUMBER: Display ST8 - MSCLVER1.

Always display "(MSN)" in interviewer instructions in parenthesis.

**Multi Field display:** Vertical Alignment

**Roster/Grid Instructions:****Roster/Grid display:****Report display:****TEXT:**

---

**Context Header:**

**Int. Instr I:** YOU HAVE ENTERED THE CLAIM CONTROL NUMBERS FROM THE MEDICARE SUMMARY NOTICE (MSN) DIFFERENTLY.

**Question Text:** FIRST TIME: (FIRST MSN CLAIM CONTROL NUMBER)

SECOND TIME: (SECOND MSN CLAIM CONTROL NUMBER)

Int. Instr II: WHICH IS CORRECT?

**INPUT FIELDS / ROUTING**

---

**Field1:** WHICHNUM ( STQ1310 )

**Cheshire Name:** COST.WHICHNUM

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated  
**Type Name:** TWhichnum  
**Answers Allowed:** 1  
**Drop Down List:** No  
**Lookup File:** No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:**  
**Max Value:**  
**Mask:**

Number	Label	Route
1	First	BOX ST9 - (STQ1320 )
	<b>English text:</b> FIRST	
2	Second	BOX ST9 - (STQ1320 )
	<b>English text:</b> SECOND	
3	Neither	ST9 - NEWCLNUM ( STQ1312 )
	<b>English text:</b> NEITHER	

**Field2:** NEWCLNUM ( STQ1312 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:** ENTER CORRECT MSN CLAIM CONTROL NUMBER:

**Label:**

**Label Position:**

**Field Type:** String **FieldSize:** 63  
**Type Name:** TMSNCLNUM **Min Value:**  
**Answers Allowed:** 1 **Max Value:**  
**Drop Down List:** No **Mask:**  
**Lookup File:** No  
**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	BOX ST9 - (STQ1320 )

Attribute	Route
Don't know	BOX ST9 - (STQ1320 )

#### BACKGROUND VARIABLE ASSIGNMENTS

**MSCLVER2** If ST9 - WHICHNUM = 2/Second or 3/Neither, set  
 COSA.MSCLVER2 = ST7 - MSNCLNUM.

SQL field = tblCOST.MSCLVER2. This field is transformed to COSA.MSCLVER2 in Cheshire.

**MSNCLNUM** If ST9 - WHICHNUM = 2/Second, set  
 COSA.MSNCLNUM = ST8 - MSCLVER1.  
 Else if ST9 - WHICHNUM = 3/Neither, set  
 COSA.MSNCLNUM = ST9 - NEWCLNUM.

#### SOFT EDIT CHECKS

#### HARD EDIT CHECKS

Edit # 1  
 IF (ST9 - NEWCLNUM ^= DK and ^= RF), ST9 - NEWCLNUM should ^= any other CLAIM NUMBER already entered at ST7.  
 If not true, display message "NUMBER HAS ALREADY BEEN ENTERED. PLEASE REENTER CLAIM CONTROL NUMBER."

Edit #2:  
 If (ST9 - NEWCLNUM ^= DK and ^= RF), ST9 - NEWCLNUM should be a minimum of twelve characters in length.  
 If not true, display message "INVALID RESPONSE. ENTRY NOT IN RANGE. PLEASE REENTER."

#### TECHNICAL NOTES

**DESIGN NOTES**

---

# **BOX ST9**

**Page Order # :** 220

## **BOX INSTRUCTIONS**

---

( STQ1320 ) IF ST5 - STATTYPE = 3/MedicareAndInsurance OR  
7/MedicareAndTricareAndInsurance, GO TO ST10 - INCLNUM ( STQ1330 ).

ELSE IF ST5 - STATTYPE = 5/MedicareAndTricare, GO TO ST11 -  
TRICLNUM ( STQ1350 ).

ELSE GO TO ST12 - INCTYPE ( STQ1390 ).

## **ASSIGNMENTS**

---

## **TECHNICAL NOTES**

---

## **DESIGN NOTES**

---

# ST10

Page Order # : 230

Design Screen Type: Text

Fields: Field 1: INSCNUM

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header:

Int. Instr I: ENTER THE CLAIM CONTROL NUMBER FROM THE INSURANCE STATEMENT. IF NO CLAIM CONTROL NUMBER LISTED, ENTER "DON'T KNOW".

Question Text:

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:**                   **INSCLNUM**                   ( STQ1330 )

**Cheshire Name:**        COST.INSCLNUM

**Item Text display:**

**Item Text:**

**Label:**                   INSURANCE CLAIM CONTROL NUMBER:  
**Label Position:**        Left

**Field Type:**            String                               **FieldSize:**        15  
**Type Name:**            TINSCLNUM                       **Min Value:**  
**Answers Allowed:**      1                                   **Max Value:**  
**Drop Down List:**      No                                  **Mask:**  
**Lookup File:**           No  
**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	BOX ST10 - (STQ1340 )

Attribute	Route
Don't know	BOX ST10 - (STQ1340 )

#### **BACKGROUND VARIABLE ASSIGNMENTS**

---

#### **SOFT EDIT CHECKS**

---

#### **HARD EDIT CHECKS**

---

#### **TECHNICAL NOTES**

---

#### **DESIGN NOTES**

---

# BOX ST10

Page Order # : 240

## BOX INSTRUCTIONS

---

( STQ1340 ) IF ST5 - STATTYPE = 6/TricareAndInsurance OR  
7/MedicareAndTricareAndInsurance, GO TO ST11 - TRICLNUM ( STQ1350 ).  
ELSE GO TO ST12 - INCTYPE ( STQ1390 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

## DESIGN NOTES

---



**ST11**

Page Order # : 250

Design Screen Type: Text

Fields: Field 1: TRICLNUM

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:** -----

Context Header:

Int. Instr I: ENTER THE CLAIM CONTROL NUMBER FROM THE TRICARE STATEMENT. IF NO CLAIM CONTROL NUMBER LISTED, ENTER "DON'T KNOW".

Question Text:

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:** TRICLNUM ( STQ1350 )

**Cheshire Name:** COST.TRICLNUM

**Item Text display:**

**Item Text:**

**Label:** TRICARE CLAIM CONTROL NUMBER:  
**Label Position:** Left

**Field Type:** String **FieldSize:** 15  
**Type Name:** TTRICLNUM **Min Value:**  
**Answers Allowed:** 1 **Max Value:**  
**Drop Down List:** No **Mask:**  
**Lookup File:** No  
**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	ST12 - INCTYPE ( STQ1390 )

Attribute	Route
Don't know	ST12 - INCTYPE ( STQ1390 )

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

**ST11B**

Page Order # : 270

Design Screen Type: Date

<b>Fields:</b>	<b>Field 1:</b>	<b>PDPBEGMM</b>
	<b>Field 2:</b>	<b>PDPBEGDD</b>
	<b>Field 3:</b>	<b>PDPBEGYY</b>
	<b>Field 4:</b>	<b>PDPENDMM</b>
	<b>Field 5:</b>	<b>PDPENDDD</b>
	<b>Field 6:</b>	<b>PDPENDYY</b>

<b>Enable Functions:</b>	<b>HELP</b>	No
	<b>COMMENTS</b>	Yes
	<b>JUMPBACK</b>	No

Roster Name:

Roster Type:

<b>Roster Functions:</b>	<b>Add Item</b>	No
	<b>Edit Item</b>	No
	<b>Delete Item</b>	No
	<b>Search Item</b>	No

<b>Grid Functions:</b>	<b>Add Line</b>	No
	<b>Delete Line</b>	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display: Vertical Alignment

Display begin date input fields, COST.PDPBEGMM,  
COST.PDPBEGDD, COST.PDPBEGYY, on 1st line.

Display end date input fields, COST.PDPENDMM, COST.  
PDPENDDD, COST.PDPENDYY on 2nd line.

Display all fields at one time.

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)

**ST11B**

TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

**Int. Instr I:** ENTER THE BEGINNING AND ENDING DATES OF SERVICE FROM THE MEDICARE PRESCRIPTION DRUG BENEFIT STATEMENT.

**Question Text:**

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

---

**Field1:** PDPBEGMM ( STQ1354 )

**Cheshire Name:** COST.PDPBEGMM

**Item Text display:**

**Item Text:** BEGINNING DATE:

**Label:** MM  
**Label Position:** Under

**Field Type:** Integer  
**Type Name:** TMonthInt  
**Answers Allowed:** 1  
**Drop Down List:** No  
**Lookup File:** No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:** 01  
**Max Value:** 12  
**Mask:**

Number	Label	Route
1	[Continuous answer.]	ST11B - PDPBEGDD ( STQ1356 )

---

Attribute	Route
Don't know	ST11B - PDPBEGDD ( STQ1356 )

---

Refusal	ST11B - PDPBEGDD ( STQ1356 )
---------	------------------------------

---

**Field2:** PDPBEGDD ( STQ1356 )

**Cheshire Name:** COST.PDPBEGDD

**Item Text display:**

**Item Text:**

**Label:** DD

**Label Position:** Under

**Field Type:** Integer

**FieldSize:** 2

**Type Name:** TDayIntDKRF

**Min Value:** 1

**Answers Allowed:** 1

**Max Value:** 31

**Drop Down List:** No

**Mask:**

**Lookup File:** No

**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	ST11B - PDPBEGYY ( STQ1358 )

Attribute	Route
Don't know	ST11B - PDPBEGYY ( STQ1358 )

Refusal	ST11B - PDPBEGYY ( STQ1358 )
---------	------------------------------

**Field3:** PDPBEGYY ( STQ1358 )

**Cheshire Name:** COST.DPDBEGYY

**Item Text display:**

**Item Text:**

**Label:** YY  
**Label Position:** Under

**Field Type:** Integer  
**Type Name:** TYearDKRF  
**Answers Allowed:** 1  
**Drop Down List:** No  
**Lookup File:** No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:** 0  
**Max Value:** 99  
**Mask:**

Number	Label	Route
1	[Continuous answer.]	ST11B - PDPENDMM ( STQ1362 )

Attribute	Route
Don't know	ST11B - PDPENDMM ( STQ1362 )

Refusal	ST11B - PDPENDMM ( STQ1362 )
---------	------------------------------

**Field4:** PDPENDMM ( STQ1362 )

**Cheshire Name:** COST.PDPENDMM

**Item Text display:**

**Item Text:** ENDING DATE:

**Label:** MM

**Label Position:** Under

**Field Type:** Integer

**Type Name:** TMonthInt

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:** 01

**Max Value:** 12

**Mask:**

Number	Label	Route
1	[Continuous answer.]	ST11B - PDPENDDD ( STQ1364 )

Attribute	Route
Don't know	ST11B - PDPENDDD ( STQ1364 )

Refusal	ST11B - PDPENDDD ( STQ1364 )
---------	------------------------------

**Field5:** PDPENDDD ( STQ1364 )

**Cheshire Name:** COST.PDPENDDD

**Item Text display:**

**Item Text:**

**Label:** DD  
**Label Position:** Under

**Field Type:** Integer **FieldSize:** 2  
**Type Name:** TDayDKRF **Min Value:** 1  
**Answers Allowed:** 1 **Max Value:** 31  
**Drop Down List:** No **Mask:**  
**Lookup File:** No  
**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	ST11B - PDPENDYY ( STQ1366 )

Attribute	Route
Don't know	ST11B - PDPENDYY ( STQ1366 )

Refusal	ST11B - PDPENDYY ( STQ1366 )
---------	------------------------------



**Field6:** PDPENDYY ( STQ1366 )

**Cheshire Name:** COST.PDPENDYY

**Item Text display:**

**Item Text:**

**Label:** YY

**Label Position:** Under

**Field Type:** Integer

**Type Name:** TYearDKRF

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:** 0

**Max Value:** 99

**Mask:**

Number	Label	Route
1	[Continuous answer.]	ST12 - INCTYPE ( STQ1390 )
Attribute	Route	
Don't know	ST12 - INCTYPE ( STQ1390 )	
Refusal	ST12 - INCTYPE ( STQ1390 )	

#### BACKGROUND VARIABLE ASSIGNMENTS

#### SOFT EDIT CHECKS

##### Edit #1

If SP is deceased, Stop Date, PDPENDMM/PDPENDDDD/PDPENDYY, should be on or before (DATE OF DEATH).

If not true, display message "VERIFY THAT THE STOP DATE WAS AFTER SP'S DATE OF DEATH, (DATE OF DEATH)."

##### Edit #2

If SP is institutionalized, Stop Date, PDPENDMM/PDPENDDDD/PDPENDYY, should be on or before (DATE OF INSTITUTIONALIZATION).

If not true, display message "VERIFY THAT THE STOP DATE WAS AFTER SP'S DATE OF INSTITUTIONALIZATION, (DATE OF INSTITUTIONALIZATION)."

##### Edit #3

Stop Date, PDPENDMM/PDPENDDDD/PDPENDYY, must be after the Start Date, PDPBEGMM/PDPBEGDD/PDPBEGYY.

If not true, display message: "VERIFY THAT THE BEGIN DATE AND END DATE ARE THE SAME DATE."

#### HARD EDIT CHECKS

Edit #1

Month and Year of Start Date, PDPBEGMM/PDPBEGYY, should be on or after (SURVEY REFERENCE MONTH AND YEAR).

If not true, display message "INVALID DATE. START DATE MUST BE ON OR AFTER (SURVEY REFERENCE MONTH AND YEAR). PLEASE REENTER."

Edit #2

Start Date, PDPBEGMM/PDPBEGDD/PDPBEGYY, should be on or before (TODAY).

If not true, display message "INVALID DATE. START DATE MUST BE ON OR BEFORE (TODAY). PLEASE REENTER."

Edit #3

Stop Date, PDPENDMM/PDPENDDD/PDPENDYY, should be on or before (TODAY).

If not true, display message "INVALID DATE. STOP DATE MUST BE ON OR BEFORE (TODAY). PLEASE REENTER."

Edit #4

Stop Date, PDPENDMM/PDPENDDD/PDPENDYY, must be on or after the Start Date, PDPBEGMM/PDPBEGDD/PDPBEGYY.

If not true, display message: "INVALID DATE. STOP DATE MUST BE ON OR AFTER (MPDP SERVICE START DATE). PLEASE REENTER."

Edit #5

If SP is deceased, Start Date, PDPBEGMM/PDPBEGDD/PDPBEGYY, must be on or before (DATE OF DEATH).

If not true, display message "INVALID DATE. START DATE MUST BE ON OR BEFORE SP'S DATE OF DEATH, (DATE OF DEATH). PLEASE REENTER."

Edit #6

If SP is institutionalized, Start Date, PDPBEGMM/PDPBEGDD/PDPBEGYY, must be on or before (DATE OF INSTITUTIONALIZATION).

If not true, display message "INVALID DATE. START DATE MUST BE ON OR BEFORE SP'S DATE OF INSTITUTIONALIZATION, (DATE OF INSTITUTIONALIZATION). PLEASE REENTER."

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

**ST12**

Page Order # : 290

Design Screen Type: Code All

Fields: Field 1: INCTYPE

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display: Always display "(S)" in interviewer instructions in parenthesis.

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: (ST CLAIM HEADER)  
SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

Int. Instr I: WHAT TYPE(S) OF EVENT(S) ARE INCLUDED IN THIS CHARGE  
BUNDLE ON THE (TYPE OF STATEMENT)?

Question Text:

Int. Instr II: CHECK ALL THAT APPLY.

**INPUT FIELDS / ROUTING**

---

**Field1:** INCTYPE ( STQ1390 )

**Cheshire Name:** NONE

REPLACES THE FOLLOWING CHESHIRE VARIABLES:

1=COST.INCDATES  
 2=COST.INCHHS - NEED TO ADD TO CHESHIRE  
 DATABASE  
 3=COST.INCOMS  
 4=COST.INCPMS

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TIncTypes

**Answers Allowed:** 4

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	ProvDates	BOX ST12 - (STQ1400 )
	<b>English text:</b> PROVIDER SERVICE DATES	
2	HHVisits	BOX ST12 - (STQ1400 )
	<b>English text:</b> HOME HEALTH VISITS	
3	OMExpenses	BOX ST12 - (STQ1400 )
	<b>English text:</b> OTHER MEDICAL EXPENSES	
4	Pmed	BOX ST12 - (STQ1400 )
	<b>English text:</b> PRESCRIBED MEDICINES	

## BACKGROUND VARIABLE ASSIGNMENTS

### SOFT EDIT CHECKS

Edit # 1:

If ST5 - STATTYPE = 8/MPDPBenefit, response to ST12 - INCTYPE should not include 1/ProvDates.

If not true, display message "PLEASE VERIFY THAT PROVIDER SERVICE DATES ARE INCLUDED IN CHARGE BUNDLE."

Edit # 2:

If ST5 - STATTYPE = 8/MPDPBenefit, response to ST12 - INCTYPE should not include 2/HHVisits.

If not true, display message "PLEASE VERIFY THAT HOME

**ST12**

HEALTH VISITS ARE INCLUDED IN CHARGE BUNDLE."

Edit # 3:

If ST5 - STATTYPE = 8/MPDPBenefit, response to ST12 - INCTYPE should not include 3/OMExpenses.

If not true, display message "PLEASE VERIFY THAT OTHER MEDICAL EXPENSES ARE INCLUDED IN CHARGE BUNDLE."

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

**BOX ST12**

**BOX INSTRUCTIONS**

---

( STQ1400 ) IF THE RESPONSE TO ST12 - INCTYPE INCLUDES 1/ProvDates, GO TO ST13 - PROVIDER\_STDATE ( STQ1410 ).  
ELSE GO TO BOX ST26 - (STQ1720 ).

**ASSIGNMENTS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

**ST13**

Page Order # : 310

Design Screen Type: Roster

Fields: Field 1: PROVIDER\_STDATE

Enable Functions:	<b>HELP</b>	No
	<b>COMMENTS</b>	Yes
	<b>JUMPBACK</b>	Yes

Roster Name: Provider Roster

Roster Type: Single Item Select

Roster Functions:	<b>Add Item</b>	Yes	Display as ' Add a Provider '
	<b>Edit Item</b>	Yes	Display as ' Edit a Provider '
	<b>Delete Item</b>	No	
	<b>Search Item</b>	No	

Grid Functions:	<b>Add Line</b>	No
	<b>Delete Line</b>	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

**Roster/Grid Instructions:** Display all Providers except for Providers where PROV.PROVNUM=01 and 02, which are reserved for PM and OM events.

Display in order of entry.

Roster/Grid display:	COL #	HEADER	INSTRUCTIONS
	1	Provider Name	Display PROV.PROVNAME.

Report display:

**TEXT:** -----

**Context Header:** (ST CLAIM HEADER)  
SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

**Int. Instr I:** WHICH MEDICAL PROVIDER IS IN THIS CHARGE BUNDLE?

**Question Text:**

**Int. Instr II:** SELECT OR ADD ONLY ONE PROVIDER.

**INPUT FIELDS / ROUTING**

---

**Field1:** PROVIDER\_STDATE ( STQ1410 )**Cheshire Name:** TEMP**Item Text display:****Item Text:****Label:****Label Position:**

<b>Field Type:</b>	String	<b>FieldSize:</b>	135
<b>Type Name:</b>	TProvPick135	<b>Min Value:</b>	
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	
<b>Drop Down List:</b>	No	<b>Mask:</b>	
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

Number	Label	Route
1	[Continuous answer.]	ST14 - STDATEUPD ( STQ1412 )

**BACKGROUND VARIABLE ASSIGNMENTS**

---

Roster details will be collected on PROV:  
 PROV key = PROV.PROVBASE + PROV.PROVNUM  
 PROV.PROVNUM = Number of Provider selected at ST13.

If Provider added at Provider Roster, see PROVIDER ROSTER POP-UP specifications for pop-up window programming instructions.

Variables populated in Provider Roster Pop-Up Window:

PROV.PROVNUM	Provider number
PROV.PROVRNDC	Round number
PROV.PROVNAME	Provider name

If Provider added, set additional fields as instructed below:

**COSTPROV** COST.COSTPROV = PROV.PROVNUM of provider selected at ST13.

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---



**ST13**

Interviewer can add or select Provider at this roster.

**ST14**

Page Order # : 312

Design Screen Type: Code 1

Fields: Field 1: STDATEUPD

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display: Display name of Provider, PROV.PROVNAME, selected at ST13.

Question display:

Multi Field display:

**Roster/Grid Instructions:**

Roster/Grid display:

Report display: Display report below Question Text.

Display all events for this provider where:

EVNT.EVNTTYPE = 'DU', 'ER', 'IP', 'IU', 'OP', 'MP', 'SD', or 'SL', and  
 EVNT.EVNTPROV = the PROV.PROVNUM selected at ST13, and  
 EVNT.EVNTDFLG ^= 1/Yes

Display in order of entry.

Report Header: PROVIDER SERVICE EVENTS

Column 1, Header = "Type".

Column 1, Display =  
 Display EVNT.EVNTTYPE

Column 2, Header = "Start Date".

Column 2, Display =  
 Display EVENT DATE in "Mon DD YYYY" format.

Column 3, Header = "Stop Date".  
 Column 3, Display =  
 If (EVNT.EVNTTYPE = 'IU') or (EVNT.EVNTTYPE = 'IP' and  
 EVNT.IPSTATUS ^= 1/StillInHospital), display EVENT END DATE in  
 "Mon DD YYYY" format.  
 Else do not display.

Column 4, Header = "Status".  
 Column 4, Display =  
 If EVNT.EVNTTYPE = 'IP' and EVNT.IPSTATUS = 1/StillInHospital,  
 display "ON".  
 Else if EVNT.VISTTYPE = 2/RepeatVisit, display "RV".  
 Else do not display.

Column 5, Header = "# Visits".  
 Column 5, Display =  
 If EVNT.VISTTYPE = 2/RepeatVisit, display EVNT.RVTIMES.  
 Else do not display.

Column 6, Header = "Round".  
 Column 6, Display =  
 Display "R" + EVNT.EVNTRNDC. EX: R45

Column 7, Display =  
 If Event Date is out of the Survey Reference Period, display "ORP".  
 Else do not display.

**TEXT:**

**Context Header:** (ST CLAIM HEADER)  
 SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
 TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)  
 PROVIDER: (PROVIDER NAME)

**Int. Instr I:** THE FOLLOWING EVENT DATES HAVE BEEN ENTERED FOR  
 THIS PROVIDER.

**Question Text:**

**Int. Instr II:** DO YOU NEED TO ADD OR EDIT AN EVENT DATE FOR THIS  
 CHARGE BUNDLE?

**INPUT FIELDS / ROUTING**

**Field1:** STDATEUPD ( STQ1412 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated  
**Type Name:** TSTDateUpd  
**Answers Allowed:** 1  
**Drop Down List:** No  
**Lookup File:** No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:**  
**Max Value:**  
**Mask:**

Number	Label	Route
1	No	ST24 - EVENT_STDATE ( STQ1705 )
<b>English text:</b> NO, DO NOT NEED TO ADD OR EDIT EVENT DATES		
2	YesAddEvent	ST16 - EVENT_STDATEADD ( STQ1430 )
<b>English text:</b> YES, NEED TO ADD EVENT DATE		
3	YesEditEvent	ST15 - EVENT_STDATEDIT ( STQ1414 )
<b>English text:</b> YES, NEED TO EDIT EVENT DATE		

#### BACKGROUND VARIABLE ASSIGNMENTS

---

#### SOFT EDIT CHECKS

---

#### HARD EDIT CHECKS

---

#### TECHNICAL NOTES

---

**246**      **ORPEvent**      Existing Event Date is outside survey reference period =  
EVNT.EVORPFLAG = 1/ORP.

New event is Out of the Survey Reference Period =  
See general specifications for Date check logic for  
determining ORP events.

#### DESIGN NOTES

---

# ST15

**Design Screen Type:** Roster

**Fields:** **Field 1:** EVENT\_STDATEDIT

**Enable Functions:**  
**HELP** No  
**COMMENTS** Yes  
**JUMPBACK** Yes

**Roster Name:** Statement Event Edit Roster

**Roster Type:** Multiple Item Select

**Roster Functions:**  
**Add Item** No  
**Edit Item** Yes Display as ' Edit Event Date '  
**Delete Item** No  
**Search Item** No

**Grid Functions:**  
**Add Line** No  
**Delete Line** No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:** Display name of Provider, PROV.PROVNAME, selected at ST13.

**Question display:**

**Multi Field display:**

**Roster/Grid Instructions:** Display all events for this provider where:  
 EVNT.EVNTTYPE = 'DU', 'ER', 'IP', 'IU', 'OP', 'MP', 'SD', or 'SL', and  
 EVNT.EVNTPROV = the PROV.PROVNUM selected at ST13, and  
 EVNT.EVNTDFLG ^= 1/Yes  
 If EVNT.EVNTTYPE = 'IP' and EVNT.IPSTATUS = 1/StillInHospital,  
 display as a protected row.

Display in order of entry.

Roster/Grid display:	COL #	HEADER	INSTRUCTIONS
	1	Type	Display EVNT.EVNTTYPE.
	2	Start Date	Display EVENT DATE in "Mon DD YYYY" format.
	3	Stop Date	If (EVNT.EVNTTYPE = 'IU') or (EVNT.EVNTTYPE = 'IP' and EVNT.IPSTATUS ^=1/StillInHospital), display EVENT END DATE in "Mon DD YYYY" format. Else do not display.

**ST15**

<b>4</b>	<b>Status</b>	If EVNT.EVNTTYPE = 'IP' and EVNT.IPSTATUS = 1/StillInHospital, display "ON". Else if EVNT.VISTTYPE = 2/RepeatVisit, display "RV". Else do not display.
<b>5</b>	<b># Visits</b>	If EVNT.VISTTYPE = 2/RepeatVisit, display EVNT.RVTIMES. Else do not display.
<b>6</b>	<b>Round</b>	Display 'R' + EVNT.EVNTRNDC. EX: R45
<b>7</b>		If Event Date is out of the Survey Reference Period, display "ORP". Else do not display.

**Report display:**

**TEXT:** -----

**Context Header:** (ST CLAIM HEADER)  
SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)  
PROVIDER: (PROVIDER NAME)

**Int. Instr I:**

**Question Text:**

**Int. Instr II:** SELECT AND EDIT THE EVENT DATE THAT NEEDS  
CORRECTION.

**INPUT FIELDS / ROUTING**

---

**Field1:** EVENT\_STDATEDIT ( STQ1414 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

<b>Field Type:</b>	String	<b>FieldSize:</b>	135
<b>Type Name:</b>	TEvntPick135	<b>Min Value:</b>	
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	
<b>Drop Down List:</b>	No	<b>Mask:</b>	
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

Number	Label	Route
1	[Continuous answer.]	ST14 - STDATEUPD ( STQ1412 )

**BACKGROUND VARIABLE ASSIGNMENTS**

Roster details will be collected on EVNT:  
 EVNT key = EVNT.EVNTBASE + EVNT.EVNTNUM  
 EVNT.EVNTNUM = Number of event selected at ST15.

If event selected for editing, see STATEMENT EVENT EDIT ROSTER POP-UP specifications for pop-up window programming specifications.

Variables updated in STATEMENT EVENT EDIT ROSTER Pop-Up Window:

EVNT.VISTTYPE	SingleVisit or RepeatVisit
EVNT.RVTIMES	# of visits
EVNT.EVBEGMM	Event Month
EVNT.EVBEGDD	Event Day
EVNT.EVBEGYY	Event Year
EVNT.EVENDMM	Event End Month
EVNT.EVENDDD	Event End Day
EVNT.EVENDYY	Event End Year

NOTE: EVNT.IPSTATUS cannot be updated in Pop-Up Window.

**EVORPFLG** If Event date edited is outside the Survey Reference Period, set EVNT.EVORPFLG = 1/ORP. See General Specifications for setting this ORP flag.

**SOFT EDIT CHECKS**

**HARD EDIT CHECKS**

Edit #1  
 Date of event, EVBEGMM/EVBEGDD/EVBEGYY, should be on or before (TODAY).  
 If not true, display message "INVALID DATE. DATE MUST BE ON

OR BEFORE (TODAY). PLEASE REENTER."

Edit #2

If (EVNTTYPE = 'IP' or 'IU'), then Discharge date, EVENDMM/EVENDDD/EVENDYY, should be on or before (TODAY). If not true, display message "INVALID DATE. DISCHARGE DATE MUST BE ON OR BEFORE (TODAY). PLEASE REENTER."

Edit #3

If (EVNTTYPE = 'IP' or 'IU'), then Discharge date, EVENDMM/EVENDDD/EVENDYY, must be on or after the Admission date, EVBEGMM/EVBEGDD/EVBEGYY. If not true, display message: "INVALID DATE. DISCHARGE DATE MUST BE ON OR AFTER (ADMISSION DATE). PLEASE REENTER."

Edit #4

If EVNTTYPE = 'IP', then the IP Admission and Discharge Date cannot overlap an existing IP stay. If not true, display message "INVALID DATE. THIS DATE OVERLAPS AN EXISTING IP STAY FROM (ADMISSION DATE) TO [(DISCHARGE DATE)/SP STILL IN HOSPITAL]. PLEASE REENTER."

Display instructions:

Display (ADMISSION DATE) of existing IP stay that the IP stay added overlaps.

If existing IP stay IPSTATUS=1/StillInHospital, display "SP STILL IN HOSPITAL".

Else display (DISCHARGE DATE) of existing IP stay that the IP stay added overlaps.

See General specifications for overlapping date logic.

Edit #5

If EVNTTYPE = 'IU' and SPALIVE=2/AliveAndInstitute and Date of Institutionalization collected at INS2 does not have any missing data, SPINSTMM, SPINSTDD, SPINSTYY ^= DK and SPINSTMM, SPINSTDD, SPINSTYY ^= RF, then admission date, EVBEGMM/EVBEGDD/EVBEGYY, and discharge date, EVENDMM/EVENDDD/EVENDYY, cannot match date of institutionalization collected at INS2, SPINSTMM/SPINSTDD/SPINSTYY.

If not true, display message "INVALID DATE. THIS DATE MATCHES THE CURRENT INSTITUTIONALIZATION DATE, (DATE OF INSTITUTIONALIZATION). PLEASE REENTER."

Edit #6

If EVNT.EVNTTYPE = 'DU', 'ER', 'OP', 'MP', 'SL' or 'SD', then Date of event, EVBEGMM/EVBEGDD/EVBEGYY, cannot match an existing event date for the same provider.

The following must be true for the event added to be a duplicate of an existing event:

Both event's EVNTDFLG ^= 1/Yes,

Both event's EVNTTYPE match.

Both event's EVNTPROV match.

Both event's EVENT DATE match. See general specifications for matching date logic.

The date of the event added should not match any event date for the same provider.

If not true, display message "INVALID DATE. THIS DATE HAS



ALREADY BEEN ENTERED. PLEASE REENTER. PLEASE REENTER."

#### TECHNICAL NOTES

---

59	<b>SPStatus</b>	SP is Alive and not institutionalized = MRES.SPALIVE=1/Alive or empty
		SP is Alive = MRES.SPALIVE=1/Alive, 2/AliveAndInstitute, or EMPTY
		SP is Institutionalized = MRES.SPALIVE=2/AliveAndInstitute
		SP is Deceased = MRES.SPALIVE=3/Deceased.
246	<b>ORPEvent</b>	Existing Event Date is outside survey reference period = EVNT.EVORPFLAG = 1/ORP.
		New event is Out of the Survey Reference Period = See general specifications for Date check logic for determining ORP events.

#### DESIGN NOTES

---

Interviewer can select events to be edited at this roster.

# ST16

Page Order # : 320

**Design Screen Type:** Roster

**Fields:** **Field 1:** **EVENT\_STDATEADD**

**Enable Functions:**  
**HELP** No  
**COMMENTS** Yes  
**JUMPBACK** Yes

**Roster Name:** Statement Event Roster

**Roster Type:** Multiple Item Select

**Roster Functions:**  
**Add Item** Yes Display as ' Add Event Date '  
**Edit Item** Yes Display as ' Edit Event Date '  
**Delete Item** No  
**Search Item** No

**Grid Functions:**  
**Add Line** No  
**Delete Line** No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:** Display name of Provider, PROV.PROVNAME, selected at ST13.

**Question display:** Always display "(S)" in interviewer instructions in parenthesis.

**Multi Field display:**

**Roster/Grid Instructions:** Display all events for this provider where:  
 EVNT.EVNTTYPE = 'DU', 'ER', 'IP', 'IU', 'OP', 'MP', 'SD', or 'SL', and  
 EVNT.EVNTPROV = the PROV.PROVNUM selected at ST13, and  
 EVNT.EVNTDFLG ^= 1/Yes

Display in order of entry.

Display all loaded events as protected rows.

<b>Roster/Grid display:</b>	<b>COL #</b>	<b>HEADER</b>	<b>INSTRUCTIONS</b>
	1	Type	Display EVNT.EVNTTYPE.
	2	Start Date	Display EVENT DATE in "Mon DD YYYY" format.
	3	Stop Date	If (EVNT.EVNTTYPE = 'IU') or (EVNT.EVNTTYPE = 'IP' and EVNT.IPSTATUS ^=1/StillInHospital), display EVENT END DATE in "Mon DD YYYY" format. Else do not display.

**ST16**

4	Status	If EVNT.EVNTTYPE = 'IP' and EVNT.IPSTATUS = 1/StillInHospital, display "ON". Else if EVNT.VISTTYPE = 2/RepeatVisit, display "RV". Else do not display.
5	# Visits	If EVNT.VISTTYPE = 2/RepeatVisit, display EVNT.RVTIMES. Else do not display.
6	Round	Display 'R' + EVNT.EVNTRNDC. EX: R45
7		If Event Date is out of the Survey Reference Period, display "ORP". Else do not display.

**Report display:**

**TEXT:**

**Context Header:** (ST CLAIM HEADER)  
SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)  
PROVIDER: (PROVIDER NAME)

**Int. Instr I:** ADD THE MISSING EVENT DATE(S) IN THIS CHARGE BUNDLE.

**Question Text:**

**Int. Instr II:** ADD ALL EVENT DATES FOR THIS PROVIDER.

**INPUT FIELDS / ROUTING**

**Field1:** EVENT\_STDATEADD ( STQ1430 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

<b>Field Type:</b>	String	<b>FieldSize:</b>	135
<b>Type Name:</b>	TSTEventPick135	<b>Min Value:</b>	
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	
<b>Drop Down List:</b>	No	<b>Mask:</b>	
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

Number	Label	Route
1	[Continuous answer.]	BOX ST16A - (STQ1550 )

**BACKGROUND VARIABLE ASSIGNMENTS**

---

Roster details will be collected on EVNT:  
 EVNT key = EVNT.EVNTBASE + EVNT.EVNTNUM  
 EVNT.EVNTNUM = Number of event selected at ST16.

See STATEMENT EVENT ROSTER POP-UP specifications for pop-up window programming instructions:

Variables populated in Statement Event Roster Pop-Up Window:

EVNT.EVNTNUM  
 EVNT.EVNTRNDC  
 EVNT.EVNTTYPE  
 EVNT.VISTTYPE  
 EVNT.RVTIMES  
 EVNT.EVBEGMM  
 EVNT.EVBEGDD  
 EVNT.EVBEGYY  
 EVNT.EVENDMM  
 EVNT.EVENDDD  
 EVNT.EVENDYY  
 EVNT.STEVTYPE  
 BASE.LASTEVT

**EVCHGFLG**                    If Event added, set EVNT.EVCHGFLG = 1/Yes.  
**EVORPFLG**                    If Event date added is outside the Survey Reference Period, set EVNT.EVORPFLG = 1/ORP. See General Specifications for setting this ORP flag.

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

Edit #1  
 Date of event, EVBEGMM/EVBEGDD/EVBEGYY, should be on or before (TODAY).  
 If not true, display message "INVALID DATE. DATE MUST BE ON OR BEFORE (TODAY). PLEASE REENTER."

Edit #2  
 If (EVNTTYPE = 'IP' or 'IU'), then Discharge date, EVENDMM/EVENDDD/EVENDYY, should be on or before (TODAY).  
 If not true, display message "INVALID DATE. DISCHARGE DATE MUST BE ON OR BEFORE (TODAY). PLEASE REENTER."

Edit #3  
 If (EVNTTYPE = 'IP' or 'IU'), then Discharge date, EVENDMM/EVENDDD/EVENDYY, must be on or after the Admission date, EVBEGMM/EVBEGDD/EVBEGYY.  
 If not true, display message: "INVALID DATE. DISCHARGE DATE MUST BE ON OR AFTER (ADMISSION DATE). PLEASE REENTER."

Edit #4  
 If EVNTTYPE = 'IP', then the IP Admission and Discharge Date cannot overlap an existing IP stay.  
 If not true, display message "INVALID DATE. THIS DATE OVERLAPS AN EXISTING IP STAY FROM (ADMISSION DATE) TO [(DISCHARGE DATE)/SP STILL IN HOSPITAL]. PLEASE

REENTER."

Display instructions:

Display (ADMISSION DATE) of existing IP stay that the IP stay added overlaps.

If existing IP stay IPSTATUS=1/StillInHospital, display "SP STILL IN HOSPITAL".

Else display (DISCHARGE DATE) of existing IP stay that the IP stay added overlaps.

See General specifications for overlapping date logic.

Edit #5

If EVNTTYPE = 'IU' and SPALIVE=2/AliveAndInstitute and Date of Institutionalization collected at INS2 does not have any missing data, SPINSTMM, SPINSTDD, SPINSTYY ^= DK and SPINSTMM, SPINSTDD, SPINSTYY ^= RF, then admission date, EVBEGMM/EVBEGDD/EVBEGYY, and discharge date, EVENDMM/EVENDDD/EVENDYY, cannot match date of institutionalization collected at INS2, SPINSTMM/SPINSTDD/SPINSTYY.

If not true, display message "INVALID DATE. THIS DATE MATCHES THE CURRENT INSTITUTIONALIZATION DATE, (DATE OF INSTITUTIONALIZATION). PLEASE REENTER."

Edit #6

If EVNT.EVNTTYPE = 'DU', 'ER', 'OP', 'MP', 'SL' or 'SD', then Date of event, EVBEGMM/EVBEGDD/EVBEGYY, cannot match an existing event date for the same provider.

The following must be true for the event added to be a duplicate of an existing event:

Both event's EVNTDFLG ^= 1/Yes,

Both event's EVNTTYPE match.

Both event's EVNTPROV match.

Both event's EVENT DATE match. See general specifications for matching date logic.

The date of the event added should not match any event date for the same provider.

If not true, display message "INVALID DATE. THIS DATE HAS ALREADY BEEN ENTERED. PLEASE REENTER. PLEASE REENTER."

## TECHNICAL NOTES

---

<b>59</b>	<b>SPStatus</b>	<p>SP is Alive and not institutionalized = MRES.SPALIVE=1/Alive or empty</p> <p>SP is Alive = MRES.SPALIVE=1/Alive, 2/AliveAndInstitute, or EMPTY</p> <p>SP is Institutionalized = MRES.SPALIVE=2/AliveAndInstitute</p> <p>SP is Deceased = MRES.SPALIVE=3/Deceased.</p>
<b>246</b>	<b>ORPEvent</b>	<p>Existing Event Date is outside survey reference period = EVNT.EVORPFLAG = 1/ORP.</p> <p>New event is Out of the Survey Reference Period = See general specifications for Date check logic for determining ORP events.</p>

**DESIGN NOTES**

---

Interviewer can only add events at this roster.

**BOX ST16A**

Page Order # : 370

**BOX INSTRUCTIONS**

---

- ( STQ1550 ) IF AT LEAST ONE EVENT ADDED AT ST16 IS A 'DU', 'ER', 'IP', 'IU', 'OP', OR 'MP' EVENT TYPE AND THE EVENT DATE WAS NOT OUTSIDE THE SURVEY REFERENCE PERIOD, GO TO BOX ST16B - (STQ1555 ).
- ELSE GO TO ST14 - STDATEUPD ( STQ1412 ).

**ASSIGNMENTS**

---

**TECHNICAL NOTES**

---

- |     |                    |                                                                                                                                     |
|-----|--------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| 246 | <b>ORPEvent</b>    | Existing Event Date is outside survey reference period =<br>EVNT.EVORPFLAG = 1/ORP.                                                 |
|     |                    | New event is Out of the Survey Reference Period =<br>See general specifications for Date check logic for<br>determining ORP events. |
| 241 | <b>TypeOfEvent</b> | Type of Event =<br>EVNT.EVNTTYPE.                                                                                                   |

**DESIGN NOTES**

---

We do not collect event details for EVNT.EVNTTYPE = 'SD' or 'SL'.

# BOX ST16B

Page Order # : 375

## BOX INSTRUCTIONS

---

( STQ1555 ) IF AT LEAST ONE EVENT ADDED AT ST16 IS A 'DU', 'ER', 'IP', 'OP', OR 'MP' EVENT TYPE, GO TO ST17 - STDATEINTRO ( STQ1560 ).  
ELSE GO TO BOX ST18 - (STQ1620 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

241	TypeOfEvent	Type of Event = EVNT.EVNTTYPE.
-----	-------------	-----------------------------------

## DESIGN NOTES

---

We do not display ST17 Introduction if EVNT.EVNTTYPE = 'IU'.



**ST17**

Page Order # : 380

Design Screen Type: No Entry

Fields: Field 1: STDATEINTRO

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display: Always display "(s)" in parenthesis.

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header:

Int. Instr I:

Question Text: Before we continue with this statement, I would like to ask you a few questions about the visit(s) I just added.

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:** STDATEINTRO ( STQ1560 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TContinueEMPTY

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	Continue	BOX ST17 - (STQ1570 )
English text: CONTINUE		

Attribute	Route
Empty	BOX ST17 - (STQ1570 )

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

# BOX ST17

## BOX INSTRUCTIONS

---

( STQ1570 ) IF AT LEAST ONE EVENT ADDED AT ST16 IS A 'DU' OR 'MP' EVENT TYPE AND THE PROVIDER SPECIALTY HAS NOT BEEN COLLECTED, GO TO ST18 - PROVSPEC ( STQ1600 ).

ELSE GO TO BOX ST18 - (STQ1620 ).

## ASSIGNMENTS

---

### TECHNICAL NOTES

---

170	<b>ProviderSpecCollected</b>	Provider Specialty has already been collected = PROV.PROVSPEC ^= EMPTY.
		Provider Specialty has not been collected = PROV.PROVSPEC = EMPTY.
241	<b>TypeOfEvent</b>	Type of Event = EVNT.EVNTTYPE.

### DESIGN NOTES

---

**ST18**

Page Order # : 420

Design Screen Type: Code 1

Fields:                   **Field 1:**           **PROVSPEC**  
                               **Field 2:**           **PROVSPOS**

Enable Functions:       **HELP**               No  
                               **COMMENTS**       Yes  
                               **JUMPBACK**       Yes

Roster Name:

Roster Type:

Roster Functions:       **Add Item**           No  
                               **Edit Item**           No  
                               **Delete Item**       No  
                               **Search Item**       No

Grid Functions:         **Add Line**           No  
                               **Delete Line**       No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:       Display name of Provider, PROV.PROVNAME, selected at ST13.

Multi Field display:    Vertical Alignment

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:** -----

Context Header:

Int. Instr I:

Question Text:           What kind of medical person is (PROVIDER NAME)?

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**ST18**

**Field1:** PROVSPEC ( STQ1600 )

**Cheshire Name:** PROV.PROVSPEC

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TProvspec

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	Dentist	BOX ST18 - (STQ1620 )
	<b>English text:</b> DENTIST/DENTAL PROVIDER	
2	MedicalDoctor	BOX ST18 - (STQ1620 )
	<b>English text:</b> MEDICAL DOCTOR	
3	Audiologist	BOX ST18 - (STQ1620 )
	<b>English text:</b> AUDIOLOGIST	
4	Chiropractor	BOX ST18 - (STQ1620 )
	<b>English text:</b> CHIROPRACTOR	
5	ClinicalSocialWorker	BOX ST18 - (STQ1620 )
	<b>English text:</b> CLINICAL SOCIAL WORKER	
6	Dietitian	BOX ST18 - (STQ1620 )
	<b>English text:</b> DIETITIAN-NUTRITIONIST	
7	HearingTherapist	BOX ST18 - (STQ1620 )
	<b>English text:</b> HEARING THERAPIST	
8	HomeHealthAide	BOX ST18 - (STQ1620 )
	<b>English text:</b> HOME HEALTH/HEALTH AIDE	
9	Homemaker	BOX ST18 - (STQ1620 )
	<b>English text:</b> HOMEMAKER	
10	HospiceWorker	BOX ST18 - (STQ1620 )
	<b>English text:</b> HOSPICE WORKER	
11	IvTherapist	BOX ST18 - (STQ1620 )
	<b>English text:</b> I.V. THERAPIST	
12	Nurse	BOX ST18 - (STQ1620 )
	<b>English text:</b> NURSE (RN)	
13	NursePractitioner	BOX ST18 - (STQ1620 )
	<b>English text:</b> NURSE PRACTITIONER	

## ST18

14	NursesAide	BOX ST18 - (STQ1620 )
	<b>English text:</b> NURSE'S AIDE	
15	OccupationalTherapist	BOX ST18 - (STQ1620 )
	<b>English text:</b> OCCUPATIONAL THERAPIST (OT)	
16	Optometrist	BOX ST18 - (STQ1620 )
	<b>English text:</b> OPTOMETRIST (OD)	
17	Osteopath	BOX ST18 - (STQ1620 )
	<b>English text:</b> OSTEOPATH (DO)	
18	Paramedic	BOX ST18 - (STQ1620 )
	<b>English text:</b> PARAMEDIC	
19	PhysicalTherapist	BOX ST18 - (STQ1620 )
	<b>English text:</b> PHYSICAL THERAPIST (PT)	
20	PhysiciansAssistant	BOX ST18 - (STQ1620 )
	<b>English text:</b> PHYSICIAN'S ASSISTANT	
21	Podiatrist	BOX ST18 - (STQ1620 )
	<b>English text:</b> PODIATRIST (FOOT DOCTOR)	
22	Psychologist	BOX ST18 - (STQ1620 )
	<b>English text:</b> PSYCHOLOGIST	
23	RespiratoryTherapist	BOX ST18 - (STQ1620 )
	<b>English text:</b> RESPIRATORY THERAPIST	
24	SocialWorker	BOX ST18 - (STQ1620 )
	<b>English text:</b> SOCIAL/CASE WORKER	
25	SpeechTherapist	BOX ST18 - (STQ1620 )
	<b>English text:</b> SPEECH THERAPIST	
26	MentalHealth	BOX ST18 - (STQ1620 )
	<b>English text:</b> THERAPIST (MENTAL HEALTH)	
27	XrayTechnician	BOX ST18 - (STQ1620 )
	<b>English text:</b> X-RAY TECHNICIAN	
28	LicensedPracticalNurse	BOX ST18 - (STQ1620 )
	<b>English text:</b> LICENSED PRACTICAL NURSE (LPN)	
29	Acupuncturist	BOX ST18 - (STQ1620 )
	<b>English text:</b> ACUPUNCTURIST	
30	Homeopath	BOX ST18 - (STQ1620 )
	<b>English text:</b> HOMEOPATH	
31	MassageTherapist	BOX ST18 - (STQ1620 )
	<b>English text:</b> MASSAGE THERAPIST	
32	Naturopath	BOX ST18 - (STQ1620 )
	<b>English text:</b> NATUROPATH	
33	LicensedCounselor	BOX ST18 - (STQ1620 )
	<b>English text:</b> LICENSED PROFESSIONAL COUNSELOR [LPC]	
34	LabTechnician	BOX ST18 - (STQ1620 )
	<b>English text:</b> LAB TECHNICIAN	

91 Other

ST18 - PROVSPPOS ( STQ1610 )

English text: OTHER MEDICAL PROVIDER SPECIALTY

Attribute	Route
Don't know	BOX ST18 - (STQ1620 )
Refusal	BOX ST18 - (STQ1620 )

**Field2:** PROVSPPOS ( STQ1610 )

**Cheshire Name:** PROV.PROVSPPOS

**Item Text display:** Display "(SPECIFY)" in the same blue font used for interviewer instructions.

**Item Text:** OTHER MEDICAL PROVIDER (SPECIFY)

**Label:**  
**Label Position:**

**Field Type:** String **FieldSize:** 30  
**Type Name:** TOtherSpec **Min Value:**  
**Answers Allowed:** 1 **Max Value:**  
**Drop Down List:** No **Mask:**  
**Lookup File:** No  
**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	BOX ST18 - (STQ1620 )

**BACKGROUND VARIABLE ASSIGNMENTS**

**SOFT EDIT CHECKS**

**HARD EDIT CHECKS**

**TECHNICAL NOTES**

**DESIGN NOTES**



**BOX ST18**

Page Order # : 430

**BOX INSTRUCTIONS**

---

( STQ1620 ) IF (SP REPORTED RECEIVING HEALTH CARE SERVICES THROUGH V.A. IN THE CURRENT ROUND OR ANY PREVIOUS ROUND) AND (IF THIS PROVIDER IS ASSOCIATED WITH V.A. IS UNKNOWN), GO TO ST19 - VAPLACE ( STQ1630 ).

ELSE GO TO BOX ST19 - (STQ1650 ).

**ASSIGNMENTS**

---

**TECHNICAL NOTES**

---

423	<b>SPReceivedCaretThruVA</b>	SP reported receiving health care services through V.A.in the current or any previous round = There is an HRND where HRND.HRNRND = current round and HRND.VACOVER = 1/Yes. HRND.VACOVER is set at BOX HI20 or collected at HI36.
127	<b>ProviderVAUnknown</b>	If Provider is associated with V.A. is unknown = PROV.VAPLACE = empty.

**DESIGN NOTES**

---

**ST19**

Page Order # : 440

Design Screen Type: Yes/No

Fields: Field 1: VAPLACE

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display: Display name of Provider, PROV.PROVNAME, selected at ST13.

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header:

Int. Instr I:

Question Text: Is (PROVIDER NAME) associated with a Department of Veterans Affairs, or V.A. facility?

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:**                    **VAPLACE**                    ( STQ1630 )

**Cheshire Name:**            PROV.VAPLACE

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:**                Enumerated  
**Type Name:**                TYesNoDKRF  
**Answers Allowed:**        1  
**Drop Down List:**        No  
**Lookup File:**                No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:**  
**Max Value:**  
**Mask:**

Number	Label	Route
1	Yes	BOX ST19 - (STQ1650 )
	<b>English text: YES</b>	
2	No	BOX ST19 - (STQ1650 )
	<b>English text: NO</b>	

Attribute	Route
Don't know	BOX ST19 - (STQ1650 )
Refusal	BOX ST19 - (STQ1650 )

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

**BOX ST19**

Page Order # : 460

**BOX INSTRUCTIONS**

---

- ( STQ1650 ) IF ALL EVENTS ADDED AT ST16 ARE 'IU' EVENT TYPE, GO TO ST14 - STDATEUPD ( STQ1412 ).
- ELSE IF (SP COVERED BY A MANAGED CARE PLAN ANYTIME DURING THE CURRENT ROUND) AND (IF THIS PROVIDER IS ASSOCIATED WITH A MANAGED CARE PLAN IS UNKNOWN), GO TO ST20 - HMOASSOC ( STQ1660 ).
- ELSE IF (SP COVERED BY A MANAGED CARE PLAN ANYTIME DURING THE CURRENT ROUND) AND (THIS PROVIDER IS NOT ASSOCIATED WITH A MANAGED CARE PLAN), GO TO ST21 - HMOREFER ( STQ1670 ).
- ELSE GO TO ST22A\_IN - NAVIGATOR ( STQ1675 ).

**ASSIGNMENTS**

---

**TECHNICAL NOTES**

---

<b>52</b>	<b>DeletedPlans</b>	Deleted plans that are not valid for displays or checks = Any PLAN where (PLAN.PLANDFLG=1/Yes or PLAN.MHMODFLG=1/Yes or PLAN.PLANHIDE=1/Yes or PLAN.LOSEPLFG ^=EMPTY) is a deleted PLAN.
<b>2</b>	<b>ManagedCarePlan</b>	SP covered by a Managed Care Plan anytime during current round = There is a PLRO.PLROPLAN=PLAN.PLANUM & PLRO.PLRORND=current round & ((PLRO.PPRVHMO=1/Yes) or (PLAN.PLANTYPE = 5/MHMO & PLRO.COVANYTM=1/Yes) or (PLRO.MCAIDHMO=1/Yes)). See T.N. 52.
<b>128</b>	<b>ProviderHMOUnknown</b>	If Provider is associated with a Managed Care plan is unknown = PROV.HMOASSOC=empty.
<b>130</b>	<b>ProviderNotHMO</b>	Provider is not associated with a Managed Care plan = PROV.HMOASSOC=2/No, DK, or RF.
<b>129</b>	<b>ProviderAssocHMO</b>	Provider is associated with a Managed Care plan = PROV.HMOASSOC=1/Yes.
<b>241</b>	<b>TypeOfEvent</b>	Type of Event = EVNT.EVNTTYPE.

**DESIGN NOTES**

---

We do not collect event details for 'IU' events.

**ST20**

Page Order # : 470

Design Screen Type: Yes/No

Fields: Field 1: HMOASSOC

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:****Question display:** Display name of Provider, PROV.PROVNAME, selected at ST13.**Multi Field display:****Roster/Grid Instructions:****Roster/Grid display:**

**Report display:** Display all managed care plans SP was covered by anytime during the current round.  
 Display managed care plan name(s) below question text.  
 Display plans in the following order: Medicare Managed Care plans, Medicaid Managed Care plans, and Private Managed Care plans. If there is more than one plan for any specific plan type, display in order of entry.

Column 1, header = "MANAGED CARE PLANS".  
 Column 1, display= If Medicaid Managed Care Plan, display "Medicaid Managed Care Plan".  
 Else display health insurance plan name "(PLAN NAME) Managed Care Plan".

**TEXT:**

---

**Context Header:**

Int. Instr I:

**Question Text:** Is (PROVIDER NAME) associated with [your/(SP's)] [READ MANAGED CARE PLAN NAME(S) BELOW] plan?

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:** HMOASSOC ( STQ1660 )

**Cheshire Name:** PROV.HMOASSOC

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated  
**Type Name:** TYesNoDKRF  
**Answers Allowed:** 1  
**Drop Down List:** No  
**Lookup File:** No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:**  
**Max Value:**  
**Mask:**

Number	Label	Route
1	Yes	ST22A_IN - NAVIGATOR ( STQ1675 )
	<b>English text: YES</b>	
2	No	ST21 - HMOREFER ( STQ1670 )
	<b>English text: NO</b>	

Attribute	Route
Don't know	ST21 - HMOREFER ( STQ1670 )
Refusal	ST21 - HMOREFER ( STQ1670 )

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**52 DeletedPlans Deleted plans that are not valid for displays or checks =**

		Any PLAN where (PLAN.PLANDFLG=1/Yes or PLAN.MHMODFLG=1/Yes or PLAN.PLANHIDE=1/Yes or PLAN.LOSEPLFG ^=EMPTY) is a deleted PLAN.
2	<b>ManagedCarePlan</b>	SP covered by a Managed Care Plan anytime during current round = There is a PLRO.PLROPLAN=PLAN.PLANUM & PLRO.PLRORND=current round & ((PLRO.PPRVHMO=1/Yes) or (PLAN.PLANTYPE = 5/MHMO & PLRO.COVANYTM=1/Yes) or (PLRO.MCAIDHMO=1/Yes)). See T.N. 52.
107	<b>PlanIsMCaidHMO</b>	SP is covered by a Medicaid Managed Care Plan during the current round = There is a PLAN where PLAN.PLANTYPE=2/Medicaid & PLRO where (PLRO.PLROPLAN=PLAN.PLANUM & PLRO.PLRORND=current round & PLRO.MCAIDHMO=1/Yes). Exclude Deleted Plans. See T.N. 52.
111	<b>PlanIsMCareHMO</b>	SP is covered by a Medicare Managed Care Plan during the current round = There is a PLAN where PLAN.PLANTYPE=5/MHMO & PLRO where (PLRO.PLROPLAN=PLAN.PLANUM & PLRO.PLRORND=current round & PLRO.COVANYTM=1/Yes). Exclude Deleted Plans. See T.N. 52.
112	<b>PlanIsPrivateHMO</b>	SP is covered by a Private Managed Care Plan during the current round = There is a PLAN where PLAN.PLANTYPE=4/PrivatePlan & PLRO where (PLRO.PLROPLAN=PLAN.PLANUM & PLRO.PLRORND=current round & PLRO.PPRVHMO=1/Yes). Exclude Deleted Plans. See T.N. 52.
106	<b>HIPlanName</b>	Health Insurance Plan Roster is stored on PLAN. Plan name = PLAN.PLNAME.

---

**DESIGN NOTES**

**ST21**

Page Order # : 480

Design Screen Type: Yes/No

Fields: Field 1: HMOREFER

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:****Question display:** Display name of Provider, PROV.PROVNAME, selected at ST13.**Multi Field display:****Roster/Grid Instructions:****Roster/Grid display:**

**Report display:** Display all managed care plans SP was covered by anytime during the current round.  
 Display managed care plan name(s) below question text.  
 Display plans in the following order: Medicare Managed Care plans, Medicaid Managed Care plans, and Private Managed Care plans. If there is more than one plan for any specific plan type, display in order of entry.

Column 1, header = "MANAGED CARE PLANS".  
 Column 1, display= If Medicaid Managed Care Plan, display "Medicaid Managed Care Plan".  
 Else display health insurance plan name "(PLAN NAME) Managed Care Plan".

**TEXT:**

---

**Context Header:**



Int. Instr I:

**Question Text:** [Were you/Was (SP)] referred to (PROVIDER NAME) by [READ  
MANAGED CARE PLAN NAME(S) BELOW]?

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:** HMOREFER ( STQ1670 )

**Cheshire Name:** EVNT.HMOREFER

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated  
**Type Name:** TYesNoDKRF  
**Answers Allowed:** 1  
**Drop Down List:** No  
**Lookup File:** No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:**  
**Max Value:**  
**Mask:**

Number	Label	Route
1	Yes	ST22A_IN - NAVIGATOR ( STQ1675 )
	<b>English text: YES</b>	
2	No	ST22A - NOGOHMO ( STQ1672 )
	<b>English text: NO</b>	

Attribute	Route
Don't know	ST22A_IN - NAVIGATOR ( STQ1675 )
Refusal	ST22A_IN - NAVIGATOR ( STQ1675 )

**BACKGROUND VARIABLE ASSIGNMENTS**

---

HMOREFER is an EVENT level detail. The response to HMOREFER needs to be copied to EVNT.HMOREFER for event added at ST16.

**HMOREFER** Set EVNT.HMOREFER = ST21 - HMOREFER on each event added at ST16.

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

<b>52</b>	<b>DeletedPlans</b>	Deleted plans that are not valid for displays or checks = Any PLAN where (PLAN.PLANDFLG=1/Yes or PLAN.MHMODFLG=1/Yes or PLAN.PLANHIDE=1/Yes or PLAN.LOSEPLFG ^=EMPTY) is a deleted PLAN.
<b>2</b>	<b>ManagedCarePlan</b>	SP covered by a Managed Care Plan anytime during current round = There is a PLRO.PLROPLAN=PLAN.PLANUM & PLRO.PLRORND=current round & ((PLRO.PPRVHMO=1/Yes) or (PLAN.PLANTYPE = 5/MHMO & PLRO.COVANYTM=1/Yes) or (PLRO.MCAIDHMO=1/Yes)). See T.N. 52.
<b>107</b>	<b>PlanIsMCaidHMO</b>	SP is covered by a Medicaid Managed Care Plan during the current round = There is a PLAN where PLAN.PLANTYPE=2/Medicaid & PLRO where (PLRO.PLROPLAN=PLAN.PLANUM & PLRO.PLRORND=current round & PLRO.MCAIDHMO=1/Yes). Exclude Deleted Plans. See T.N. 52.
<b>111</b>	<b>PlanIsMCareHMO</b>	SP is covered by a Medicare Managed Care Plan during the current round = There is a PLAN where PLAN.PLANTYPE=5/MHMO & PLRO where (PLRO.PLROPLAN=PLAN.PLANUM & PLRO.PLRORND=current round & PLRO.COVANYTM=1/Yes). Exclude Deleted Plans. See T.N. 52.
<b>112</b>	<b>PlanIsPrivateHMO</b>	SP is covered by a Private Managed Care Plan during the current round = There is a PLAN where PLAN.PLANTYPE=4/PrivatePlan & PLRO where (PLRO.PLROPLAN=PLAN.PLANUM & PLRO.PLRORND=current round & PLRO.PPRVHMO=1/Yes). Exclude Deleted Plans. See T.N. 52.
<b>106</b>	<b>HIPlanName</b>	Health Insurance Plan Roster is stored on PLAN. Plan name = PLAN.PLNAME.

**DESIGN NOTES**

---

# ST22A

Page Order # : 485

Design Screen Type: Code 1

<b>Fields:</b>	<b>Field 1:</b>	<b>NOGOHMO</b>
	<b>Field 2:</b>	<b>NOGOHMOS</b>

<b>Enable Functions:</b>	<b>HELP</b>	No
	<b>COMMENTS</b>	No
	<b>JUMPBACK</b>	No

Roster Name:

Roster Type:

<b>Roster Functions:</b>	<b>Add Item</b>	No
	<b>Edit Item</b>	No
	<b>Delete Item</b>	No
	<b>Search Item</b>	No

<b>Grid Functions:</b>	<b>Add Line</b>	No
	<b>Delete Line</b>	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display: Vertical Alignment

Roster/Grid Instructions:

Roster/Grid display:

**Report display:** Display managed care plan name(s) below question text.  
 Display plans in the following order: Medicare Managed Care plans, Medicaid Managed Care plans, and Private Managed Care plans. If there is more than one plan for any specific plan type, display in order of entry.  
 Column 1, header = "MANAGED CARE PLANS".  
 Column 1, display= If Medicaid Managed Care Plan, display "Medicaid Managed Care Plan".  
 Else display health insurance plan name "(PLAN NAME) Managed Care Plan".

**TEXT:** -----

Context Header:

Int. Instr I:

**ST22A**

**Question Text:**

What is the most important reason [you/(SP)] did not see a doctor associated with [READ MANAGED CARE PLAN NAME(S) BELOW] or a doctor that [READ MANAGED CARE PLAN NAME(S) BELOW] would refer [you/(SP)] to?

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

---

**Field1:** NOGOHMO ( STQ1672 )

**Cheshire Name:** EVNT.NOGOHMO

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** Tnogohmo

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	PlanNotCoverService	ST22A_IN - NAVIGATOR ( STQ1675 )
	<b>English text:</b> PLAN DOES NOT COVER THE SERVICE SP WANTED	
2	DifficultyDelayGettingService	ST22A_IN - NAVIGATOR ( STQ1675 )
	<b>English text:</b> DIFFICULTY OR DELAY IN GETTING SERVICES	
3	SPProviderPreference	ST22A_IN - NAVIGATOR ( STQ1675 )
	<b>English text:</b> SP PROVIDER PREFERENCE	
4	ServiceCoverdbyOtherInsurance	ST22A_IN - NAVIGATOR ( STQ1675 )
	<b>English text:</b> THIS SERVICE WAS COVERED BY OTHER INSURANCE SP HAS	
5	NotinManagedCareTimeofEvent	ST22A_IN - NAVIGATOR ( STQ1675 )
	<b>English text:</b> NOT IN A MANAGED CARE PLAN AT TIME OF EVENT	
6	NoChoiceMedEmergency	ST22A_IN - NAVIGATOR ( STQ1675 )
	<b>English text:</b> NO CHOICE - MEDICAL EMERGENCY OR OUT OF SERVICE AREA	
91	Other	ST22A - NOGOHMOS ( STQ1674 )
	<b>English text:</b> OTHER	

Attribute	Route
Don't know	ST22A_IN - NAVIGATOR ( STQ1675 )
Refusal	ST22A_IN - NAVIGATOR ( STQ1675 )

**Field2:**                    **NOGOHMOS**                    ( STQ1674 )

**Cheshire Name:**            EVNT.NOHMOMOS

**Item Text display:**        Display "(SPECIFY)" in the same blue font used for interviewer instructions.

**Item Text:**                 OTHER (SPECIFY)

**Label:**

**Label Position:**

**Field Type:**                String

**FieldSize:**                30

**Type Name:**                TOthrspec

**Min Value:**

**Answers Allowed:**        1

**Max Value:**

**Drop Down List:**        No

**Mask:**

**Lookup File:**              No

**Lookup File Name:**

<b>Number</b>	<b>Label</b>	<b>Route</b>
1	[Continuous answer.]	ST22A_IN - NAVIGATOR ( STQ1675 )

#### **BACKGROUND VARIABLE ASSIGNMENTS**

NOGOHMO and NOGOHMOS are EVENT level details.

The response to NOGOHMO needs to be copied to EVNT.NOGOHMO for each event added at ST16.

The response to NOGOHMOS needs to be copied to EVNT.NOGOHMOS for each event added at ST16.

#### **SOFT EDIT CHECKS**

#### **HARD EDIT CHECKS**

#### **TECHNICAL NOTES**

#### **DESIGN NOTES**

**ST22A\_IN**

Page Order # : 489

Design Screen Type: Instance Navigator

Fields: Field 1: NAVIGATOR

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:****Question display:** Display all DU, ER, IP, OP, MP events added at ST16.

Display all IU, SD, SL events as "DONE". Do not allow event details to be collected for these events.

**Multi Field display:****Roster/Grid Instructions:****Roster/Grid display:****Report display:****TEXT:**

---

**Context Header:****Int. Instr I:****Question Text:****Int. Instr II:****INPUT FIELDS / ROUTING**

---

**Field1:** NAVIGATOR ( STQ1675 )

**Cheshire Name:** N/A

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TInstanceNavigator

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	SelectItemInList	BOX ST22A - ( STQ1680 )
	<b>English text:</b> ITEM SELECTED IN INSTANCE NAVIGATOR	
2	SelectContinueInterview	ST14 - STDATEUPD ( STQ1412 )
	<b>English text:</b> CONTINUE INTERVIEW SELECTED	

#### BACKGROUND VARIABLE ASSIGNMENTS

---

#### SOFT EDIT CHECKS

---

#### HARD EDIT CHECKS

---

#### TECHNICAL NOTES

---

#### DESIGN NOTES

---



**BOX ST22A**

Page Order # : 490

**BOX INSTRUCTIONS**

---

( STQ1680 )      FOR THIS EVENT ADDED AT ST16,  
                          IF TYPE OF EVENT = 'DU', GO TO DU7 - DVPROCDR ( DUQ1170 ).  
                          ELSE IF TYPE OF EVENT = 'ER', GO TO ER5 - CONDITION\_ER ( ERQ1160 ).  
                          ELSE IF TYPE OF EVENT = 'IP', GO TO IP7 - ANYOPERS ( IPQ1240 ).  
                          ELSE IF TYPE OF EVENT = 'OP', GO TO OP5 - ANYOPERS ( OPQ1160 ).  
                          ELSE IF TYPE OF EVENT = 'MP', GO TO BOX ST22B - ( STQ1685 ).  
                          ELSE GO TO BOX ST23B - ( STQ1700 ).

**ASSIGNMENTS**

---

**TECHNICAL NOTES**

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241	<b>TypeOfEvent</b>	Type of Event = EVNT.EVNTTYPE.
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**DESIGN NOTES**

---

BOX ST22A calls the DU, ER, IP, OP Utilization sections, depending on EVNTTYPE of event added at ST16.

MP events are handled by BOX ST23A.

IU, SD, SL events do not get event details.

DU, ER, IP and OP returns to ST at BOX ST23B.

**BOX ST22B**

Page Order # : 495

**BOX INSTRUCTIONS**

---

( STQ1685 ) IF (PROVIDER SPECIALTY IS A MEDICAL DOCTOR) AND ((EVENT DATE OVERLAPS AN EXISTING IP EVENT) OR (EVENT DATE MATCHES AN EXISTING ER OR OP EVENT) GO TO ST23 - MPSDVIS ( STQ1691 ).

ELSE GO TO BOX ST23A - (STQ1695 ).

**ASSIGNMENTS**

---

**TECHNICAL NOTES**

---

<b>171</b>	<b>ProviderMedicalDoctor</b>	Provider Specialty is a Medical Doctor = PROV.PROVSPEC=2/MedicalDoctor
<b>350</b>	<b>OverlapERIPOPStay</b>	Event date overlaps an existing IP stay or Event date matches an existing ER or OP event date = See general specifications for detailed date logic check.

**DESIGN NOTES**

---

**ST23**

Page Order # : 500

Design Screen Type: Yes/No

Fields: Field 1: MPSDVIS

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:** Display name of medical provider, PROV.PROVNAME, for MP event added at ST16, where PROV.PROVNUM = EVNT.EVNTPROV.

Display date of event for the for MP event added at ST16.

**Question display:** EVENT MONTH = Display Month of the MP event added at ST16.

Display name of medical provider, PROV.PROVNAME, for MP event added at ST16, where PROV.PROVNUM = EVNT.EVNTPROV.

Display "in" in the second sentence in BOLD.

If event overlaps more than one existing ER, IP, or OP event, display "any of these places".  
Else display "the [READ EVENT LISTED BELOW]".

**Multi Field display:****Roster/Grid Instructions:****Roster/Grid display:**

**Report display:** Display report below question text.  
Display ER, IP, and OP events that overlap or match the MP event added at ST16.  
Report Header: OVERLAPPING EVENT DATES  
Column 1, header = "EVENT TYPE".  
Column 1, display =

**ST23**

If EVNT.EVNTTYPE = 2/ER, display "Emergency Room".  
Else if EVNT.EVNTTYPE = 5/IP, display "Hospital as an Inpatient".  
Else if EVNT.EVNTTYPE = 9/OP, display "Outpatient Department".  
Column 2, header = "EVENT DATE".  
Column 2, display EVENT BEGIN DATE  
Column 3, header = "EVENT END DATE".  
Column 3, display EVENT END DATE

**TEXT:** -----

**Context Header:** PROVIDER: (PROVIDER NAME)  
EVENT: (EVENT DATE)

**Int. Instr I:**

**Question Text:** We have recorded that in (EVENT MONTH) [you were/(SP) was]  
also in [READ EVENT(S) LISTED BELOW]. Was this visit with  
(PROVIDER NAME) a visit while [you were/(SP) was] in [the [READ  
EVENT LISTED BELOW]/any of these places]?

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

---

**Field1:** MPDVIS ( STQ1691 )

**Cheshire Name:** EVNT.MPSDVIS

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated  
**Type Name:** TYesNoDKRF  
**Answers Allowed:** 1  
**Drop Down List:** No  
**Lookup File:** No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:**  
**Max Value:**  
**Mask:**

Number	Label	Route
1	Yes	BOX ST23A - (STQ1695 )
English text: YES		
2	No	BOX ST23A - (STQ1695 )
English text: NO		

Attribute	Route
Don't know	BOX ST23A - (STQ1695 )
Refusal	BOX ST23A - (STQ1695 )

**BACKGROUND VARIABLE ASSIGNMENTS**

**EVNTTYPE** If ST23 - MPSDVIS = 1/Yes, update MP event type to Separately Billing Doctor, EVNT.EVNTTYPE = 'SD'.  
**STEVTYPE** If ST23 - MPSDVIS = 1/Yes, update MP Statement event type to Separately Billing Doctor, EVNT.STEVTYPE = 2/SD.

**SOFT EDIT CHECKS**

**HARD EDIT CHECKS**

**TECHNICAL NOTES**

**350 OverlapERIPOPstay** Event date overlaps an existing IP stay or Event date matches an existing ER or OP event date = See general specifications for detailed date logic check.

**DESIGN NOTES**

# BOX ST23A

Page Order # : 505

## BOX INSTRUCTIONS

---

( STQ1695 ) IF ST23 ASKED AND ST23 - MPSDVIS = 1/Yes, GO TO BOX ST23B -  
(STQ1700 ).  
  
ELSE GO TO BOX MP2C - (MPQ1220 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

## DESIGN NOTES

---

BOX ST23A calls the MP Utilization section.

MP returns to ST at BOX ST23B.

# BOX ST23B

Page Order # : 510

## BOX INSTRUCTIONS

( STQ1700 ) GO TO ST22A\_IN - NAVIGATOR ( STQ1675 ).

## ASSIGNMENTS

## TECHNICAL NOTES

## DESIGN NOTES

Return from Utilization sections at BOX ST23B.

**ST24**

Page Order # : 515

Design Screen Type: Roster

Fields: Field 1: EVENT\_STDATE

Enable Functions:      **HELP**                      No  
                                  **COMMENTS**                      No  
                                  **JUMPBACK**                      No

Roster Name: Statement Event Roster

Roster Type: Multiple Item Select

Roster Functions:      **Add Item**                      No  
                                  **Edit Item**                      No  
                                  **Delete Item**                      No  
                                  **Search Item**                      No

Grid Functions:        **Add Line**                      No  
                                  **Delete Line**                      No

**DISPLAY INSTRUCTIONS:**

Context header display: Display name of Provider, PROV.PROVNAME, selected at ST13.

Question display: Always display "(S)" in interviewer instructions in parenthesis.

Multi Field display:

Roster/Grid Instructions: Display all events for this provider where:

EVNT.EVNTTYPE = 'DU', 'ER', 'IP', 'IU', 'OP', 'MP', 'SD', or 'SL', and  
 EVNT.EVNTPROV = the PROV.PROVNUM selected at ST13, and  
 EVNT.EVNTDFLG ^= 1/Yes

Display in order of entry.

Roster/Grid display:	COL #	HEADER	INSTRUCTIONS
	1	Type	Display EVNT.EVNTTYPE.
	2	Start Date	Display EVENT DATE in "Mon DD YYYY" format.
	3	Stop Date	If (EVNT.EVNTTYPE = 'IU') or (EVNT.EVNTTYPE = 'IP' and EVNT.IPSTATUS ^=1/StillInHospital), display EVENT END DATE in "Mon DD YYYY" format.. Else do not display.



**ST24**

<b>4</b>	Status	If EVNT.EVNTTYPE = 'IP' and EVNT.IPSTATUS = 1/StillInHospital, display "ON". Else if EVNT.VISTTYPE = 2/RepeatVisit, display "RV". Else do not display.
<b>5</b>	# Visits	If EVNT.VISTTYPE = 2/RepeatVisit, display EVNT.RVTIMES. Else do not display.
<b>6</b>	Round	Display 'R' + EVNT.EVNTRNDC. EX: R45
<b>7</b>		If Event Date is out of the Survey Reference Period, display "ORP". Else do not display.

**Report display:**

**TEXT:** -----

**Context Header:** (ST CLAIM HEADER)  
SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)  
PROVIDER: (PROVIDER NAME)

**Int. Instr I:**

**Question Text:**

**Int. Instr II:** SELECT THE EVENT DATE(S) THAT ARE INCLUDED IN THIS  
CHARGE BUNDLE.

**INPUT FIELDS / ROUTING**

---

**Field1:**                   **EVENT\_STDATE**       ( STQ1705 )

**Cheshire Name:**        TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

<b>Field Type:</b>	String	<b>FieldSize:</b>	135
<b>Type Name:</b>	TEvntPick135	<b>Min Value:</b>	
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	
<b>Drop Down List:</b>	No	<b>Mask:</b>	
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

Number	Label	Route
1	[Continuous answer.]	BOX ST24 - (STQ1707 )

#### **BACKGROUND VARIABLE ASSIGNMENTS**

Create an XCEV record for each event selected at ST24 to link the event to the charge bundle being asked about. XCEV record may already exist.

If XCEV record does not exist, create XCEV record:

XCEV key = XCEV.XCEVBASE + XCEV.XCEVCOST + XCEV.XCEVBAS2 + XCEV.XCEVEVNT  
 XCEV.XCEVBASE and XCEV.XCEVBAS2 = BASE.BASEID.  
 XCEV.XCEVCOST = COST.COSTNUM of charge bundle being asked about.  
 XCEV.XCEVEVNT = EVNT.EVNTNUM of event selected at ST24.

Set fields as specified below:

<b>XCEVCOST</b>	Create XCEV where XCEV.XCEVCOST = this COST.COSTNUM.
<b>XCEVEVNT</b>	Create XCEV where XCEV.XCEVEVNT = EVNT.EVNTNUM of EVNT selected.
<b>XCEVRNDC</b>	Set XCEV.XCEVRNDC = current round.
<b>DELLINK</b>	If XCEV exists and XCEV.DEELLINK = 1/Yes, update XCEV.DEELLINK = empty.

#### **SOFT EDIT CHECKS**

#### **HARD EDIT CHECKS**

#### **TECHNICAL NOTES**

**ST24**

**246 ORPEvent**

Existing Event Date is outside survey reference period =  
EVNT.EVORPFLAG = 1/ORP.

New event is Out of the Survey Reference Period =  
See general specifications for Date check logic for  
determining ORP events.

**DESIGN NOTES**

---

Interviewer can only select events at this roster.

# BOX ST24

## BOX INSTRUCTIONS

---

( STQ1707 ) IF AT LEAST ONE EVENT SELECTED AT ST24 IS A REPEAT VISIT, GO TO ST24A - RVLINKS ( STQ1708 ).  
ELSE GO TO ST25 - STDATMTCH ( STQ1710 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

135	RepeatVisitEvent	If Event entered as a Repeat Visit = EVNT.VISTTYPE=2/RepeatVisit.
-----	------------------	----------------------------------------------------------------------

## DESIGN NOTES

---

**ST24A**

Page Order # : 518

Design Screen Type: Numeric

Fields: Field 1: RVLINKS

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display: Display name of Provider, PROV.PROVNAME, selected at ST13.

Question display: Display type of event, EVNT.EVNTTYPE, for the ST24 Repeat Visit being asked about.

Display the date of the ST24 Repeat Visit event being asked about. Display in "Month, YYYY" format.

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: (ST CLAIM HEADER)  
SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)  
PROVIDER: (PROVIDER NAME)

Int. Instr I:

Question Text:

Int. Instr II: ENTER THE NUMBER OF (EVENT TYPE) VISITS IN (EVENT MONTH, YEAR) THAT ARE COVERED BY THIS CHARGE.

**INPUT FIELDS / ROUTING**

---

**Field1:** RVLINKS ( STQ1708 )**Cheshire Name:** XCEV.RVLINKS**Item Text display:****Item Text:****Label:** NUMBER OF VISITS:**Label Position:** Left**Field Type:** Integer**Type Name:** TRVtimes**Answers Allowed:** 1**Drop Down List:** No**Lookup File:** No**Lookup File Name:****FieldSize:****Min Value:** 1**Max Value:** 90**Mask:**

Number	Label	Route
1	[Continuous answer.]	BOX ST24A - (STQ1709 )

Attribute	Route
Don't know	BOX ST24A - (STQ1709 )

Refusal	BOX ST24A - (STQ1709 )
---------	------------------------

**BACKGROUND VARIABLE ASSIGNMENTS**

---

Collect # of visits on XCEV:

XCEV key = XCEV.XCEVBASE + XCEV.XCEVCOST + XCEV.XCEVBAS2 + XCEV.XCEVEVNT

XCEV.XCEVCOST = COST.COSTNUM of charge bundle being asked about.

XCEV.XCEVEVNT = EVNT.EVNTNUM of Repeat Visit event currently being asked about.

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

# BOX ST24A

## BOX INSTRUCTIONS

---

( STQ1709 ) IF ANOTHER EVENT SELECTED AT ST24 IS A REPEAT VISIT, GO TO  
ST24A - RVLINKS ( STQ1708 ).  
  
ELSE GO TO ST25 - STDATMTCH ( STQ1710 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

135	<b>RepeatVisitEvent</b>	If Event entered as a Repeat Visit = EVNT.VISTTYPE=2/RepeatVisit.
-----	-------------------------	----------------------------------------------------------------------

## DESIGN NOTES

---

**ST25**

Page Order # : 520

Design Screen Type: Code 1

Fields: Field 1: STDATEMTCH

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display: Display report below question text.

Display all Events linked to this charge bundle where XCEV.XCEVEVNT = the EVNT.EVNTNUM and XCEV.XCEVCOST = the COST.COSTNUM for the Charge Bundle and XCEV.DELLINK ^=1/Yes. Display PMs followed by OM events, HH events and then other provider service events.

NOTE: This report is shared by other questions. Not all Event types will be applicable at each screen.

Report header: EVENTS IN CHARGE BUNDLE

Report layout:

Column 1, header =Type

Display EVNT.EVNTTYPE

Column 2, NO HEADER.

If EVNT.RENTPROB=2/Rent and ((EVNT.RENT2BUY ^= 2/PurchasedRentToBuy) or (EVNT.RENT2BUY = EMPTY)), display



"R".

Else do not display.

Column 3, header = Description

If EVNT.EVNTTYPE = OM then

If EVNT.STOMTYPE = 91, display EVOS.EVOSTEXT on EVOS  
where EVOS.EVOSEVNT = this EVNT.EVNTNUM.

Else display EVNT.STOMTYPE response text.

Else if EVNT.EVNTTYPE = PM, display EVNT.PMEDNAME.

Else display PROV.PROVNAME on PROV where PROV.PROVNUM  
= this EVNT.EVNTPROV.

Column 4, header = Start Date

If EVNT.EVNTTYPE = HF or HP,

display COST START DATE in "Mon DD YYYY" format.

Else if (EVNT.EVNTTYPE = DU, ER, IP, IU, OP, MP, SD or SL) or

(EVNT.EVNTTYPE = OM and  
((EVNT.OTHRTYPE ^= 5/OstomySupplies and  
^= 6/IncontinenceSupplies and ^= 7/Bandages) or  
(EVNT.OTHRTYPE = EMPTY)) and  
((EVNT.OMSTATUS ^= 1/AlterationNotComplete) or  
(EVNT.OMSTATUS = EMPTY))),

display EVENT DATE in "Mon DD YYYY" format.

Else do not display.

Column 5, header = Stop Date

If EVNT.EVNTTYPE = HF or HP,

display COST STOP DATE in "Mon DD YYYY" format.

Else if (EVNT.EVNTTYPE = IU) or

(EVNT.EVNTTYPE = IP and  
EVNT.IPSTATUS ^= 1/StillInHospital) or

(EVNT.EVNTTYPE = OM and EVNT.RENTPROB = 2/Rent and  
(EVNT.RENTSTIL = 2/No, DK, or RF) and  
((EVNT.RENT2BUY ^= 2/PurchasedRentToBuy) or  
(EVNT.RENT2BUY = EMPTY))),

display EVNT END DATE in "Mon DD YYYY" format.

Else do not display.

Column 6, header = Status

If EVNT.VISTTYPE = 2/RepeatVisit, display "RV".

Else if

(EVNT.EVNTTYPE = OM and  
EVNT.OMSTATUS = 1/AlterationNotComplete) or

(EVNT.EVNTTYPE = IP and EVNT.IPSTATUS =  
1/StillInHospital),

display "ON".

Else if EVNT.RENTSTIL = 1/Yes, display "RR".

Else if EVNT.RENT2BUY=2/PurchasedRentToBuy, display "OW".

Else do not display.

Column 7, header = # Visits

If EVNT.VISTTYPE = 2/RepeatVisit, display XCEV.RVLINKS on XCEV where XCEV.XCEVEVNT = this EVNT.EVNTNUM and XCEV.XCEVCOST = the COST.COSTNUM for this charge bundle.

Else do not display.

Column 8, header = # Purchases

If (EVNT.EVNTTYPE = PM) or (EVNT.EVNTTYPE = OM and (EVNT.OTHRTYPE = 5/OstomySupplies, 6/IncontinenceSupplies, or 7/Bandages)),

display XCEV.NUMLINKS on XCEV where XCEV.XCEVEVNT = this EVNT.EVNTNUM and XCEV.XCEVCOST = the COST.COSTNUM for this charge bundle.

Else do not display.

Column 9,

If Event Date is out of Survey Reference Period, display "ORP".

Else do not display.

**TEXT:**

**Context Header:**

(ST CLAIM HEADER)  
SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)  
PROVIDER: (PROVIDER NAME)

**Int. Instr I:**

ARE ALL THE PROVIDER EVENTS FROM THE CHARGE BUNDLE  
ON (TYPE OF STATEMENT) SHOWN BELOW?

**Question Text:**

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

**Field1:**                    **STDATEMTCH**                    ( STQ1710 )

**Cheshire Name:**            TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:**                Enumerated  
**Type Name:**                TSTDateMtch  
**Answers Allowed:**        1  
**Drop Down List:**        No  
**Lookup File:**                No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:**  
**Max Value:**  
**Mask:**

Number	Label	Route
1	Yes	BOX ST26 - (STQ1720 )
	<b>English text:</b> YES	
2	NoAddDate	ST13 - PROVIDER_STDATE ( STQ1410 )
	<b>English text:</b> NO, NEED TO ADD A PROVIDER EVENT	
3	NoDeleteDate	ST26 - EVENT_STDATEDDEL ( STQ1715 )
	<b>English text:</b> NO, NEED TO REMOVE A PROVIDER EVENT	

#### BACKGROUND VARIABLE ASSIGNMENTS

---

#### SOFT EDIT CHECKS

---

#### HARD EDIT CHECKS

---

#### TECHNICAL NOTES

---

**246**            **ORPEvent**                    Existing Event Date is outside survey reference period =  
EVNT.EVORPFLAG = 1/ORP.

New event is Out of the Survey Reference Period =  
See general specifications for Date check logic for  
determining ORP events.

#### DESIGN NOTES

---

# ST26

Page Order # : 525

**Design Screen Type:** Roster

**Fields:** **Field 1:** EVENT\_STDATEDEL

**Enable Functions:**  
**HELP** No  
**COMMENTS** No  
**JUMPBACK** No

**Roster Name:** Statement Event Roster

**Roster Type:** Multiple Item Select

**Roster Functions:**  
**Add Item** No  
**Edit Item** No  
**Delete Item** No  
**Search Item** No

**Grid Functions:**  
**Add Line** No  
**Delete Line** No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:**

**Question display:** Always display "(S)" in interviewer instructions in parenthesis.

**Multi Field display:**

**Roster/Grid Instructions:** Display all Provider Service events linked to this charge bundle:

There is an EVNT where:  
 EVNT.EVNTTYPE = 'DU', 'ER', 'IP', 'IU', 'OP', 'MP', 'SD', or 'SL', and

There is an XCEV where:  
 XCEV.XCEVEVNT = this EVNT.EVNTNUM, and  
 XCEV.XCEVCOST = COST.COSTNUM for this charge bundle, and  
 XCEV.DELLINK ^= 1/Yes.

Display in order of entry.

**Roster/Grid display:**

COL #	HEADER	INSTRUCTIONS
1	Type	Display EVNT.EVNTTYPE.
2	Start Date	Display EVENT DATE in "Mon DD YYYY" format.
3	Stop Date	If (EVNT.EVNTTYPE = 'IU') or (EVNT.EVNTTYPE = 'IP' and EVNT.IPSTATUS ^=1/StillInHospital), display EVENT END DATE in "Mon DD YYYY" format. Else do not display.

**ST26**

<b>4</b>	Status	If EVNT.EVNTTYPE = 'IP' and EVNT.IPSTATUS = 1/StillInHospital, display "ON". Else if EVNT.VISTTYPE = 2/RepeatVisit, display "RV". Else do not display.
<b>5</b>	# Visits	If EVNT.VISTTYPE = 2/RepeatVisit, display XCEV.RVLINKS on XCEV where XCEV.XCEVEVNT=this EVNT.EVNTNUM and XCEV.XCEVCOST=COST.COSTNUM for this charge bundle. Else do not display.
<b>6</b>	Round	Display 'R' + EVNT.EVNRNDC. EX: R45
<b>7</b>		If Event Date is out of the Survey Reference Period, display "ORP". Else do not display.

**Report display:**

**TEXT:** -----

**Context Header:** (ST CLAIM HEADER)  
SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)  
PROVIDER: (PROVIDER NAME)

**Int. Instr I:**

**Question Text:**

**Int. Instr II:** SELECT THE EVENT(S) THAT YOU WOULD LIKE TO REMOVE  
FROM THE CHARGE BUNDLE.

**INPUT FIELDS / ROUTING**

---

**Field1:** EVENT\_STDATEDEL (STQ1715)

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

<b>Field Type:</b>	String	<b>FieldSize:</b>	135
<b>Type Name:</b>	TEvntPick135	<b>Min Value:</b>	
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	
<b>Drop Down List:</b>	No	<b>Mask:</b>	
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

Number	Label	Route
1	[Continuous answer.]	ST25 - STDATEMTCH (STQ1710)

#### BACKGROUND VARIABLE ASSIGNMENTS

Roster details will be collected on XCEV:

XCEV key = XCEV.XCEVBASE + XCEV.XCEVCOST + XCEV.XCEVBAS2 + XCEV.XCEVEVNT  
 XCEV.XCEVBASE and XCEV.XCEVBAS2 = BASE.BASEID.  
 XCEV.XCEVCOST = COST.COSTNUM of charge bundle being asked about.  
 XCEV.XCEVEVNT = EVNT.EVNTNUM of event selected at ST26

Each Event selected at ST26 will be flagged as "deleted" on XCEV. The event will no longer being "linked" to the charge bundle being asked about. See detailed instructions below.

**DELLINK** Set XCEV.DELLINK = 1/Yes on XCEV where XCEV.XCEVCOST = this COST.COSTNUM and XCEV.XCEVEVNT = EVNT.EVNTNUM of event selected.

#### SOFT EDIT CHECKS

#### HARD EDIT CHECKS

#### TECHNICAL NOTES

<b>246</b>	<b>ORPEvent</b>	Existing Event Date is outside survey reference period = EVNT.EVORPFLAG = 1/ORP.  New event is Out of the Survey Reference Period = See general specifications for Date check logic for determining ORP events.
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#### DESIGN NOTES

Interviewer can only select events at this roster.

# **BOX ST26**

**Page Order # :** 530

## **BOX INSTRUCTIONS**

---

( STQ1720 ) IF ST12 – INCTYPE INCLUDES 2/HHVisits, GO TO ST27 -  
PROVIDER\_STHH ( STQ1725 ).  
  
ELSE GO TO BOX ST33 - ( STQ1785 ).

## **ASSIGNMENTS**

---

## **TECHNICAL NOTES**

---

## **DESIGN NOTES**

---



**ST27**

Page Order # : 535

Design Screen Type: Roster

Fields: Field 1: PROVIDER\_STHH

Enable Functions:	<b>HELP</b>	No
	<b>COMMENTS</b>	Yes
	<b>JUMPBACK</b>	Yes

Roster Name: Provider Roster

Roster Type: Single Item Select

Roster Functions:	<b>Add Item</b>	Yes	Display as ' Add a Provider '
	<b>Edit Item</b>	Yes	Display as ' Edit a Provider '
	<b>Delete Item</b>	No	
	<b>Search Item</b>	No	

Grid Functions:	<b>Add Line</b>	No
	<b>Delete Line</b>	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

**Roster/Grid Instructions:** Display all Providers except for Providers where PROV.PROVNUM=01 and 02, which are reserved for PM and OM events.

Display in order of entry.

Roster/Grid display:	COL #	HEADER	INSTRUCTIONS
	1	Provider Name	Display PROV.PROVNAME.

Report display:

**TEXT:** -----

**Context Header:** (ST CLAIM HEADER)  
SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

**Int. Instr I:** WHICH HOME HEALTH PROVIDER IS IN THIS CHARGE BUNDLE?

**Question Text:**

Int. Instr II: SELECT OR ADD ONLY ONE PROVIDER.

#### INPUT FIELDS / ROUTING

---

**Field1:** PROVIDER\_STHH ( STQ1725 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

<b>Field Type:</b>	String	<b>FieldSize:</b>	135
<b>Type Name:</b>	TProvPick135	<b>Min Value:</b>	
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	
<b>Drop Down List:</b>	No	<b>Mask:</b>	
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

Number	Label	Route
1	[Continuous answer.]	ST28 - COSTBEGM ( STQ1730 )

---

#### BACKGROUND VARIABLE ASSIGNMENTS

---

Roster details will be collected on PROV:  
 PROV key = PROV.PROVBASE + PROV.PROVNUM  
 PROV.PROVNUM = Number of Provider selected at ST27.

If Provider added at Provider Roster, see PROVIDER ROSTER POP-UP specifications for pop-up window programming instructions.

Variables populated in Provider Roster Pop-Up Window:

PROV.PROVNUM	Provider number
PROV.PROVRNDC	Round number
PROV.PROVNAME	Provider name

If Provider added, set additional fields as instructed below:

**COSTPROV** COST.COSTPROV = PROV.PROVNUM of provider selected at ST27.

#### SOFT EDIT CHECKS

---

#### HARD EDIT CHECKS

---

#### TECHNICAL NOTES

---

**DESIGN NOTES**

---

Interviewer can add or select Provider at this roster.

**ST28**

Page Order # : 538

Design Screen Type: Numeric

<b>Fields:</b>	<b>Field 1:</b>	<b>COSTBEGM</b>
	<b>Field 2:</b>	<b>COSTBEGD</b>
	<b>Field 3:</b>	<b>COSTBEGY</b>
	<b>Field 4:</b>	<b>COSTENDM</b>
	<b>Field 5:</b>	<b>COSTENDD</b>
	<b>Field 6:</b>	<b>COSTENDY</b>

<b>Enable Functions:</b>	<b>HELP</b>	No
	<b>COMMENTS</b>	No
	<b>JUMPBACK</b>	No

Roster Name:

Roster Type:

<b>Roster Functions:</b>	<b>Add Item</b>	No
	<b>Edit Item</b>	No
	<b>Delete Item</b>	No
	<b>Search Item</b>	No

<b>Grid Functions:</b>	<b>Add Line</b>	No
	<b>Delete Line</b>	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:** Display name of Provider, PROV.PROVNAME, selected at ST27.**Question display:****Multi Field display:** Vertical AlignmentDisplay start date input fields, COST.COSTBEGM,  
COST.COSTBEGD, COST.COSTBEGY, on 1st line.Display stop date input fields, COST.COSTENDM,  
COST.COSTENDD, COST.COSTENDY, on 2nd line.

Display all fields at one time.

**Roster/Grid Instructions:****Roster/Grid display:****Report display:****TEXT:**

---

**Context Header:** (ST CLAIM HEADER)

**ST28**

SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)  
PROVIDER: (PROVIDER NAME)

**Int. Instr I:**

**Question Text:**

**Int. Instr II:** ENTER THE START DATE AND STOP DATE COVERED BY THE  
CHARGE BUNDLE.

**INPUT FIELDS / ROUTING**

---

**Field1:** COSTBEGM ( STQ1730 )

**Cheshire Name:** COST.COSTBEGM

**Item Text display:**

**Item Text:** START DATE:

**Label:** MM

**Label Position:** Under

**Field Type:** Integer

**FieldSize:** 2

**Type Name:** TMonthInt

**Min Value:** 01

**Answers Allowed:** 1

**Max Value:** 12

**Drop Down List:** No

**Mask:**

**Lookup File:** No

**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	ST28 - COSTBEGD ( STQ1731 )

---

Attribute	Route
Don't know	ST28 - COSTBEGD ( STQ1731 )

---

Refusal	ST28 - COSTBEGD ( STQ1731 )
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---

**Field2:** COSTBEGD ( STQ1731 )

**Cheshire Name:** COST.COSTBEGD

**Item Text display:**

**Item Text:**

**Label:** DD  
**Label Position:** Under

**Field Type:** Integer **FieldSize:** 2  
**Type Name:** TDayDKRF **Min Value:** 1  
**Answers Allowed:** 1 **Max Value:** 31  
**Drop Down List:** No **Mask:**  
**Lookup File:** No  
**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	ST28 - COSTBEGY ( STQ1732 )

Attribute	Route
Don't know	ST28 - COSTBEGY ( STQ1732 )

Refusal	ST28 - COSTBEGY ( STQ1732 )
---------	-----------------------------

**Field3:** COSTBEGY ( STQ1732 )

**Cheshire Name:** COST.COSTBEGY

**Item Text display:**

**Item Text:**

**Label:** YY

**Label Position:** Under

**Field Type:** Integer

**FieldSize:** 2

**Type Name:** TYear2DKRF

**Min Value:** 00

**Answers Allowed:** 1

**Max Value:** 99

**Drop Down List:** No

**Mask:**

**Lookup File:** No

**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	ST28 - COSTENDM ( STQ1733 )

Attribute	Route
Don't know	ST28 - COSTENDM ( STQ1733 )

Refusal	ST28 - COSTENDM ( STQ1733 )
---------	-----------------------------

**Field4:** COSTENDM ( STQ1733 )

**Cheshire Name:** COST.COSTENDM

**Item Text display:**

**Item Text:** STOP DATE:

**Label:** MM

**Label Position:** Under

**Field Type:** Integer

**FieldSize:** 2

**Type Name:** TMonthInt

**Min Value:** 01

**Answers Allowed:** 1

**Max Value:** 12

**Drop Down List:** No

**Mask:**

**Lookup File:** No

**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	ST28 - COSTENDD ( STQ1734 )

Attribute	Route
Don't know	ST28 - COSTENDD ( STQ1734 )

Refusal	ST28 - COSTENDD ( STQ1734 )
---------	-----------------------------



**Field5:** COSTENDD ( STQ1734 )

**Cheshire Name:** COST.COSTENDD

**Item Text display:**

**Item Text:**

**Label:** DD

**Label Position:** Under

**Field Type:** Integer

**FieldSize:** 2

**Type Name:** TDayDKRF

**Min Value:** 1

**Answers Allowed:** 1

**Max Value:** 31

**Drop Down List:** No

**Mask:**

**Lookup File:** No

**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	ST28 - COSTENDY ( STQ1735 )

Attribute	Route
Don't know	ST28 - COSTENDY ( STQ1735 )

Refusal	ST28 - COSTENDY ( STQ1735 )
---------	-----------------------------

**Field6:** COSTENDY ( STQ1735 )

**Cheshire Name:** COST.COSTENDY

**Item Text display:**

**Item Text:**

**Label:** YY

**Label Position:** Under

**Field Type:** Integer

**FieldSize:** 2

**Type Name:** TYear2DKRF

**Min Value:** 00

**Answers Allowed:** 1

**Max Value:** 99

**Drop Down List:** No

**Mask:**

**Lookup File:** No

**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	BOX ST28A - (STQ1740 )
Attribute	Route	
Don't know	BOX ST28A - (STQ1740 )	
Refusal	BOX ST28A - (STQ1740 )	

#### BACKGROUND VARIABLE ASSIGNMENTS

#### SOFT EDIT CHECKS

##### Edit #1

If SP is deceased, Start Date, COSTBEGM/COSTBEGD/COSTBEGY, should be on or before (DATE OF DEATH).

If not true, display message "VERIFY THAT THE START DATE WAS AFTER SP'S DATE OF DEATH, (DATE OF DEATH)."

##### Edit #2

If SP is deceased, Stop Date, COSTENDM/COSTENDD/COSTENDY, should be on or before (DATE OF DEATH).

If not true, display message "VERIFY THAT THE STOP DATE WAS AFTER SP'S DATE OF DEATH, (DATE OF DEATH)."

##### Edit #3

If SP is institutionalized, Start Date, COSTBEGM/COSTBEGD/COSTBEGY, should be on or before (DATE OF INSTITUTIONALIZATION).

If not true, display message "VERIFY THAT THE START DATE WAS AFTER SP'S DATE OF INSTITUTIONALIZATION, (DATE OF INSTITUTIONALIZATION)."

**Edit #4**

If SP is institutionalized, Stop Date, COSTENDM/COSTENDDD/COSTENDY, should be on or before (DATE OF INSTITUTIONALIZATION).

If not true, display message "VERIFY THAT THE STOP DATE WAS AFTER SP'S DATE OF INSTITUTIONALIZATION, (DATE OF INSTITUTIONALIZATION)."

**Edit #5**

Start Date, COSTBEGM/COSTBEGD/COSTBEGY, should not be Out of the Survey Reference period.

If not true, display message "VERIFY THAT THE START DATE IS OUTSIDE OF THE SURVEY REFERENCE PERIOD."

**Edit #6**

Stop Date, COSTENDM/COSTENDDD/COSTENDY, should not be Out of the Survey Reference period.

If not true, display message "VERIFY THAT THE STOP DATE IS OUTSIDE OF THE SURVEY REFERENCE PERIOD."

**HARD EDIT CHECKS**

---

**Edit #1**

Start Date, COSTBEGM/COSTBEGD/COSTBEGY, should be on or before (TODAY).

If not true, display message "INVALID DATE. START DATE MUST BE ON OR BEFORE (TODAY). PLEASE REENTER."

**Edit #2**

Stop Date, COSTENDM/COSTENDDD/COSTENDY, should be on or before (TODAY).

If not true, display message "INVALID DATE. STOP DATE MUST BE ON OR BEFORE (TODAY). PLEASE REENTER."

**Edit #3**

Stop Date, COSTENDM/COSTENDDD/COSTENDY, must be on or

after the Start Date, COSTBEGM/COSTBEGD/COSTBEGY.

If not true, display message: "INVALID DATE. STOP DATE MUST BE ON OR AFTER (COST START DATE). PLEASE REENTER."

**TECHNICAL NOTES**

---

<b>59</b>	<b>SPStatus</b>	<p>SP is Alive and not institutionalized = MRES.SPALIVE=1/Alive or empty</p> <p>SP is Alive = MRES.SPALIVE=1/Alive, 2/AliveAndInstitute, or EMPTY</p> <p>SP is Institutionalized = MRES.SPALIVE=2/AliveAndInstitute</p> <p>SP is Deceased = MRES.SPALIVE=3/Deceased.</p>
<b>246</b>	<b>ORPEvent</b>	<p>Existing Event Date is outside survey reference period = EVNT.EVORPFLAG = 1/ORP.</p> <p>New event is Out of the Survey Reference Period = See general specifications for Date check logic for determining ORP events.</p>

**DESIGN NOTES**

---

**BOX ST28A**

Page Order # : 540

**BOX INSTRUCTIONS**

---

( STQ1740 ) IF (HOME HEALTH PROVIDER WAS ADDED AT ST27) OR (AN EXISTING PROVIDER WAS SELECTED AT ST27 THAT WAS NOT ASSOCIATED WITH A HOME HEALTH EVENT), GO TO ST30 - HHEVNTTYPE ( STQ1755 ).

ELSE GO TO BOX ST31B - (STQ1770 ).

**ASSIGNMENTS**

---

**TECHNICAL NOTES**

---

<b>245</b>	<b>ProviderNotHHEvent</b>	Provider not associated with Home Health Event = For this PROV, there is no EVNT where (EVNT.EVNTPROV=PROV.PROVNUM & (EVNT.EVNTTYPE = 'HP' or 'HF') & EVNT.EVNTDFLG ^= 1/Yes).
------------	---------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

**DESIGN NOTES**

---

**ST30**

Page Order # : 555

Design Screen Type: Code 1

Fields: Field 1: HHEVNTTYPE

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display: Display name of Provider, PROV.PROVNAME, selected at ST27.

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: (ST CLAIM HEADER)  
 SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
 TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)  
 PROVIDER: (PROVIDER NAME)

Int. Instr I:

Question Text:

Int. Instr II: IS THE PROVIDER A HOME HEALTH PROFESSIONAL OR SOME  
 OTHER TYPE OF HOME HEALTH PROVIDER (HOME HEALTH  
 AIDE, HOMEMAKER, ETC.)?

**INPUT FIELDS / ROUTING**

---

**Field1:** HHEVNTTYPE ( STQ1755 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** THHEVNTTYPE

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	HP	ST31 - STHHINTRO ( STQ1760 )
	<b>English text:</b> HOME HEALTH PROFESSIONAL	
2	HF	ST31 - STHHINTRO ( STQ1760 )
	<b>English text:</b> OTHER HOME HEALTH PROVIDER	

#### BACKGROUND VARIABLE ASSIGNMENTS

Set Provider Type based on ST30 - HHEVNTTYPE:

**PROVTYPE** If ST30 - HHEVNTTYPE = 1/HP, set  
 PROV.PROVTYPE = 6/HomeHealthProfessionals.  
 Else set PROV.PROVTYPE =  
 7/HomeHealthNotHHMembers.

#### SOFT EDIT CHECKS

#### HARD EDIT CHECKS

#### TECHNICAL NOTES

#### DESIGN NOTES

# ST31

Page Order # : 560

Design Screen Type: No Entry

Fields: Field 1: STHHINTRO

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header:

Int. Instr I:

Question Text: Before we continue with this statement, I would like to ask you a few questions about the home health provider I just added.

Int. Instr II:

**INPUT FIELDS / ROUTING**

---



**Field1:**                    **STHHINTRO**                    ( STQ1760 )

**Cheshire Name:**            TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:**                Enumerated  
**Type Name:**                TContinueEMPTY  
**Answers Allowed:**        1  
**Drop Down List:**        No  
**Lookup File:**                No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:**  
**Max Value:**  
**Mask:**

Number	Label	Route
1	Continue	BOX ST31A - (STQ1765 )
English text: CONTINUE		

Attribute	Route
Empty	BOX ST31A - (STQ1765 )

---

#### BACKGROUND VARIABLE ASSIGNMENTS

---

#### SOFT EDIT CHECKS

---

#### HARD EDIT CHECKS

---

#### TECHNICAL NOTES

---

#### DESIGN NOTES

# BOX ST31A

Page Order # : 565

## BOX INSTRUCTIONS

---

( STQ1765 ) IF ST30 - HHEVNTTYPE = 1/HP, GO TO HH3 - PROVSPEC ( HHQ1030 ).  
ELSE GO TO HH20 - HHFTYPE ( HHQ1330 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

## DESIGN NOTES

---

BOX ST31A calls the Home Health Utilization Section.

Event details will be collected on EVNT where EVNT.EVNTPROV = PROV.PROVNUM of Provider selected at ST27 and EVNT.EVNTTYPE = HP or HF. The EVNT record will be identified or created while administering the HH questions.

Home Health returns to ST at BOX ST31B.

**BOX ST31B**

Page Order # : 570

**BOX INSTRUCTIONS**

---

( STQ1770 ) LINK HOME HEALTH PROVIDER TO CHARGE BUNDLE .  
GO TO ST32 - STHHMTCH ( STQ1775 ).

**ASSIGNMENTS**

---

Create an XCEV record to link Home Health event to the charge bundle being asked about. XCEV record may already exist.

If XCEV record does not exist, create XCEV record:

XCEV key = XCEV.XCEVBASE + XCEV.XCEVCOST + XCEV.XCEVBAS2 +  
XCEV.XCEVEVNT

XCEV.XCEVBASE and XCEV.XCEVBAS2 = BASE.BASEID.

XCEV.XCEVCOST = COST.COSTNUM of charge bundle being asked about.

XCEV.XCEVEVNT = EVNT.EVNTNUM of Home Health event currently being asked about.

Set fields as specified below:

<b>XCEVCOST</b>	Create XCEV where XCEV.XCEVCOST = this COST.COSTNUM.
<b>XCEVEVNT</b>	Create XCEV where XCEV.XCEVEVNT = EVNT.EVNTNUM where EVNT.EVNTPROV = PROV.PROVNUM for Home Health Provider currently being asked about.
<b>XCEVRNDC</b>	Set XCEV.XCEVRNDC = current round.
<b>DELLINK</b>	If XCEV exists and XCEV.DEELLINK = 1/Yes, update XCEV.DEELLINK = empty.

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

Return from Home Section Section at BOX ST31B.

**ST32**

Page Order # : 575

Design Screen Type: Code 1

Fields: Field 1: STHHMTCH

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display: Display report below question text.

Display all Events linked to this charge bundle where XCEV.XCEVEVNT = the EVNT.EVNTNUM and XCEV.XCEVCOST = the COST.COSTNUM for the Charge Bundle and XCEV.DELLINK ^=1/Yes. Display PMs followed by OM events, HH events and then other provider service events.

NOTE: This report is shared by other questions. Not all Event types will be applicable at each screen.

Report header: EVENTS IN CHARGE BUNDLE

Report layout:

Column 1, header =Type

Display EVNT.EVNTTYPE

Column 2, NO HEADER.

If EVNT.RENTPROB=2/Rent and EVNT.RENT2BUY ^=2/PurchasedRentToBuy, display "R".

Else do not display.

Column 3, header = Description  
 If EVNT.EVNTTYPE = OM then  
 If EVNT.STOMTYPE = 91, display EVOS.EVOSTEXT on EVOS  
 where EVOS.EVOSEVNT = this EVNT.EVNTNUM.  
 Else display EVNT.STOMTYPE response text.

Else if EVNT.EVNTTYPE = PM, display EVNT.PMEDNAME.

Else display PROV.PROVNAME on PROV where PROV.PROVNUM  
 = this EVNT.EVNTPROV.

Column 4, header = Start Date  
 If EVNT.EVNTTYPE = HF or HP, display COST START DATE in  
 "Mon DD YYYY" format.

Else if (EVNT.EVNTTYPE = DU, ER, IP, IU, OP, MP, SD or SL) or

(EVNT.EVNTTYPE = OM and  
 (EVNT.OTHRTYPE ^= 5/OstomySupplies and EVNT.OTHRTYPE  
 ^= 6/IncontinenceSupplies, and  
 EVNT.OTHRTYPE ^= 7/Bandages) and  
 (EVNT.OMSTATUS ^= 1/AlterationNotComplete)),

display EVENT DATE in "Mon DD YYYY" format.

Else do not display.

Column 5, header = Stop Date  
 If EVNT.EVNTTYPE = HF or HP,  
 display COST STOP DATE in "Mon DD YYYY" format.

Else if (EVNT.EVNTTYPE = IU) or

(EVNT.EVNTTYPE = IP and EVNT.IPSTATUS ^=  
 1/StillInHospital) or

(EVNT.EVNTTYPE = OM and (EVNT.RENTSTIL = 2/No,  
 DK, or RF) and  
 (EVNT.RENT2BUY ^= 2/PurchasedRentToBuy)),

display EVNT END DATE in "Mon DD YYYY" format.

Else do not display.

Column 6, header = Status  
 If EVNT.VISTTYPE = 2/RepeatVisit, display "RV".

Else if (EVNT.EVNTTYPE = OM and EVNT.OMSTATUS =  
 1/AlterationNotComplete) or

(EVNT.EVNTTYPE = IP and EVNT.IPSTATUS =  
 1/StillInHospital),

display "ON".

Else if EVNT.RENTSTIL = 1/Yes, display "RR".

**ST32**

Else if EVNT.RENT2BUY=2/PurchasedRentToBuy, display "OW".

Else do not display.

Column 7, header = # Visits

If EVNT.VISTTYPE = 2/RepeatVisit, display XCEV.RVLINKS on XCEV where XCEV.XCEVEVNT = this EVNT.EVNTNUM and XCEV.XCEVCOST = the COST.COSTNUM for this charge bundle.

Else do not display.

Column 8, header = # Purchases

If (EVNT.EVNTTYPE = PM) or (EVNT.EVNTTYPE = OM and (EVNT.OTHRTYPE = 5/OstomySupplies, 6/IncontinenceSupplies, or 7/Bandages)),

display XCEV.NUMLINKS on XCEV where XCEV.XCEVEVNT = this EVNT.EVNTNUM and XCEV.XCEVCOST = the COST.COSTNUM for this charge bundle.

Else do not display.

Column 9,

If Event Date is out of Survey Reference Period, display "ORP".

Else do not display.

**TEXT:**

---

**Context Header:**

(ST CLAIM HEADER)  
SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)  
PROVIDER: (PROVIDER NAME)

**Int. Instr I:**

THE FOLLOWING HOME HEALTH PROVIDER EVENT HAS BEEN ADDED TO THIS CHARGE BUNDLE.

PLEASE ENTER A COMMENT IF THIS EVENT WAS ENTERED IN ERROR OR IF ANOTHER HOME HEALTH EVENT SHOULD BE INCLUDED IN THIS CHARGE BUNDLE.

**Question Text:**

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

---

**Field1:**                    **STHHMTCH**                    ( STQ1775 )

**Cheshire Name:**        TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:**            Enumerated

**Type Name:**            TContinueEMPTY

**Answers Allowed:**     1

**Drop Down List:**     No

**Lookup File:**            No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	Continue	BOX ST33 - (STQ1785 )
English text: CONTINUE		

Attribute	Route
Empty	BOX ST33 - (STQ1785 )

#### BACKGROUND VARIABLE ASSIGNMENTS

---

#### SOFT EDIT CHECKS

---

#### HARD EDIT CHECKS

---

#### TECHNICAL NOTES

---

**246        ORPEvent**                    Existing Event Date is outside survey reference period =  
 EVNT.EVORPFLAG = 1/ORP.

New event is Out of the Survey Reference Period =  
 See general specifications for Date check logic for  
 determining ORP events.

#### DESIGN NOTES

---

**BOX ST33**

**BOX INSTRUCTIONS**

---

( STQ1785 ) IF ST12 – INCTYPE INCLUDES 3/OMExpenses, GO TO ST34 - STOMUPD  
( STQ1790 ).  
  
ELSE GO TO BOX ST40 - (STQ1840 ).

**ASSIGNMENTS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---



**ST34**

Page Order # : 590

Design Screen Type: Code 1

Fields: Field 1: STOMUPD

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

**Report display:** Display Report below Question Text.

Display all other medical expense items where:

EVNT.EVNTDFLG^=1/Yes, and  
EVNT.EVNTTYPE = OM.

Display in order of entry.

Report Header = OTHER MEDICAL EXPENSE EVENTS

Column 1, Display =  
If EVNT.RENTPROB=2/Rent and ((EVNT.RENT2BUY ^=  
2/PurchasedRentToBuy) or (EVNT.RENT2BUY = EMPTY)), display  
"R".

Column 2, Header = "OME Type".  
Column 2, Display =

**ST34**

If EVNT.STOMTYPE = 91/Other, display Other Specify Text, EVOS.EVOSTEXT, on EVOS where EVOS.EVOSEVNT = this EVNT.EVNTNUM.  
Else display EVNT.STOMTYPE response text.

Column 3, Header =  
"Purchase or Repair/Rental Date".

Column 3, Display =  
If ((EVNT.OTHRTYPE ^= 5/OstomySupplies and ^= 6/IncontinenceSupplies and ^= 7/Bandages) or (EVNT.OTHRTYPE = EMPTY)) and ((EVNT.OMSTATUS ^= 1/AlterationNotComplete) or (EVNT.OMSTATUS = EMPTY)), display EVNT DATE in "Mon DD YYYY" format.  
Else do not display.

Column 4, Header =  
"Rental Stop Date".

Column 4, Display =  
If EVNT.RENTPROB = 2/Rent and (EVNT.RENTSTIL = 2/No, DK, or RF) and ((EVNT.RENT2BUY ^= 2/PurchasedRentToBuy) or (EVNT.RENT2BUY = EMPTY)), display EVNT END DATE in "Mon DD YYYY" format.  
Else do not display.

Column 5, Header = "Status".  
Column 5, Display =  
If EVNT.OMSTATUS = 1/AlterationNotComplete, display "ON".  
Else if EVNT.RENTSTIL = 1/Yes, display "RR".  
Else if EVNT.RENT2BUY = 2/PurchasedRentToBuy, display "OW".  
Else do not display.

Column 6, Header = "Round".  
Column 6, Display =  
If ((EVNT.OTHRTYPE ^= 5/OstomySupplies and EVNT.OTHRTYPE ^= 6/IncontinenceSupplies and EVNT.OTHRTYPE ^= 7/Bandages) or (EVNT.OTHRTYPE = EMPTY)), display 'R' + EVNT.EVNTRNDC.  
EX: R45  
Else do not display.

Column 7, Display =  
If Event Date is out of the Survey Reference Period, display "ORP".  
Else do not display.

**TEXT:**

**Context Header:** (ST CLAIM HEADER)  
SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

**Int. Instr I:** THE FOLLOWING OME EVENTS HAVE BEEN ENTERED.

DO YOU NEED TO ADD OR EDIT AN OME EVENT FOR THIS CHARGE BUNDLE?

**Question Text:**

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

---

**Field1:** STOMUPD ( STQ1790 )**Cheshire Name:** TEMP**Item Text display:****Item Text:****Label:****Label Position:****Field Type:** Enumerated**Type Name:** TSTOMUpd**Answers Allowed:** 1**Drop Down List:** No**Lookup File:** No**Lookup File Name:****FieldSize:****Min Value:****Max Value:****Mask:**

Number	Label	Route
1	No	ST37 - EVENT_STOM ( STQ1812 )
	<b>English text:</b> NO, DO NOT NEED TO ADD OR EDIT OME EVENT	
2	YesAddEvent	ST36 - STOMADD ( STQ1800 )
	<b>English text:</b> YES, NEED TO ADD AN OME EVENT	
3	YesEditEvent	ST35 - EVENT_STOMEDIT ( STQ1795 )
	<b>English text:</b> YES, NEED TO EDIT AN OME EVENT	

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

**ST35**

Page Order # : 595

Design Screen Type: Roster

Fields: Field 1: EVENT\_STOMEDIT

Enable Functions: **HELP** No  
**COMMENTS** No  
**JUMPBACK** No

Roster Name: Statement OM Edit Roster

Roster Type: Multiple Item Select

Roster Functions: **Add Item** No  
**Edit Item** Yes Display as ' Edit OME Event '  
**Delete Item** No  
**Search Item** No

Grid Functions: **Add Line** No  
**Delete Line** No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions: Display all other medical expense items where:

EVNT.EVNTDFLG^=1/Yes, and  
EVNT.EVNTTYPE = OM.

If (EVNT.OTHRTYPE=5/Ostomy Supplies, 6/Incontinence Supplies,  
or 7/Bandages) or (EVNT.OMSTATUS=1/Alteration NotComplete),  
display as protected row.

Display in order of entry.

Roster/Grid display:

COL #	HEADER
1	

**INSTRUCTIONS**

If EVNT.RENTPROB=2/Rent and  
((EVNT.RENT2BUY ^=  
2/PurchasedRentToBuy) or  
(EVNT.RENT2BUY = EMPTY)), display  
"R".  
Else do not display.

**ST35**

2	OME Type	If EVNT.STOMTYPE = 91/Other, display Other Specify Text, EVOS.EVOSTEXT, on EVOS where EVOS.EVOSEVNT = this EVNT.EVNTNUM. Else display EVNT.STOMTYPE response text.
3	Purchase or Repair/Rental Date	If ((EVNT.OTHRTYPE ^= 5/OstomySupplies and ^= 6/IncontinenceSupplies & ^= 7/Bandages) or (EVNT.OTHRTYPE = EMPTY)) & ((EVNT.OMSTATUS ^= 1/AlterationNotComplete) or (EVNT.OMSTATUS = EMPTY)), display EVENT DATE in "Mon DD YYYY" format. Else do not display.
4	Rental Stop Date	If EVNT.RENTPROB = 2/Rent and (EVNT.RENTSTIL = 2/No, DK, or RF) and ((EVNT.RENT2BUY ^= 2/PurchasedRentToBuy) or (EVNT.RENT2BUY = EMPTY)), display EVENT END DATE in "Mon DD YYYY" format. Else do not display.
5	Status	If EVNT.OMSTATUS = 1/AlterationNotComplete, display "ON". Else if EVNT.RENTSTIL = 1/Yes, display "RR". Else if EVNT.RENT2BUY = 2/PurchasedRentToBuy, display "OW". Else do not display.
6	Round	If ((EVNT.OTHRTYPE ^= 5/OstomySupplies and ^= 6/IncontinenceSupplies and ^= 7/Bandages) or (EVNT.OTHRTYPE = EMPTY)), display 'R' + EVNT.EVNTRNDC. EX: R45 Else do not display.
7		If Event Date is out of the Survey Reference Period, display "ORP". Else do not display.

**Report display:**

**TEXT:**

**Context Header:** (ST CLAIM HEADER)  
SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

**Int. Instr I:**

**Question Text:**

**Int. Instr II:** SELECT AND EDIT THE OTHER MEDICAL EXPENSE EVENT THAT NEEDS CORRECTION.

**INPUT FIELDS / ROUTING**

---

**Field1:** EVENT\_STOMEDIT ( STQ1795 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

<b>Field Type:</b>	String	<b>FieldSize:</b>	135
<b>Type Name:</b>	TEvntPick135	<b>Min Value:</b>	
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	
<b>Drop Down List:</b>	No	<b>Mask:</b>	
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

Number	Label	Route
1	[Continuous answer.]	ST34 - STOMUPD ( STQ1790 )

**BACKGROUND VARIABLE ASSIGNMENTS**

Roster details will be collected on EVNT:  
 EVNT key = EVNT.EVNTBASE + EVNT.EVNTNUM  
 EVNT.EVNTNUM = Number of event selected at ST35.

If OM event is selected for editing, see STATEMENT OM EDIT ROSTER POP-UP specifications for pop-up window programming specifications.

Fields updated in Pop-Up window:

- EVNT.EVBEGMM
- EVNT.EVBEGDD
- EVNT.EVBEGYY
- EVNT.EVENDMM
- EVNT.EVENDDD
- EVNT.EVENDYY

**EVORPFLG** If Event date edited is outside the Survey Reference Period, set EVNT.EVORPFLG = 1/ORP. See General Specifications for setting this ORP flag.

**SOFT EDIT CHECKS**

**HARD EDIT CHECKS**

**Edit #1**  
 Date of event, EVBEGMM/EVBEGDD/EVBEGYY, should be on or before (TODAY).  
 If not true, display message "INVALID DATE. DATE MUST BE ON OR BEFORE (TODAY). PLEASE REENTER."

**Edit #2**  
 If ((EVNT.RENTSTIL = 2/No, DK, or RF) and ((EVNT.RENT2BUY

^= 2/PurchasedRentToBuy) or (EVNT.RENT2BUY = EMPTY))),  
 Rental End Date, EVENDMM/EVENDDD/EVENDYY, should be on  
 or before (TODAY).  
 If not true, display message "INVALID DATE. RENTAL STOP DATE  
 MUST BE ON OR BEFORE (TODAY). PLEASE REENTER."

#### Edit #3

If ((EVNT.RENTSTIL = 2/No, DK, or RF) and ((EVNT.RENT2BUY  
 ^= 2/PurchasedRentToBuy) or (EVNT.RENT2BUY = EMPTY))),  
 Rental End Date, EVENDMM/EVENDDD/EVENDYY, must be on or  
 after the Rental Start Date, EVBEGMM/EVBEGDD/EVBEGYY.  
 If not true, display message: "INVALID DATE. RENTAL STOP  
 DATE MUST BE ON OR AFTER (RENTAL START DATE). PLEASE  
 REENTER."

#### Edit #4

Date of event, EVBEGMM/EVBEGDD/EVBEGYY, cannot match an  
 existing date entered on this roster.

The following must be true for the event added to be a duplicate of  
 an existing event:

Both event's EVNTDFLG ^= 1/Yes.

Both event's STOMTYPE match.

Both event's EVENT DATE match. See general specifications for  
 matching date logic.

Both event's RENTPROB matches, OR

1st Event RENTPROB = 1/Buy and 2nd Event RENTPROB = DK  
 or RF, OR 1st Event RENTPROB = DK or RF and 2nd Event  
 RENTPROB = 1/Buy.

The date of the event added should not match any other date on  
 roster.

If not true, display message "INVALID DATE. THIS DATE HAS  
 ALREADY BEEN ENTERED. PLEASE REENTER. "

### TECHNICAL NOTES

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<b>59</b>	<b>SPStatus</b>	<p>SP is Alive and not institutionalized =          MRES.SPALIVE=1/Alive or empty</p> <p>SP is Alive =          MRES.SPALIVE=1/Alive, 2/AliveAndInstitute, or EMPTY</p> <p>SP is Institutionalized =          MRES.SPALIVE=2/AliveAndInstitute</p> <p>SP is Deceased =          MRES.SPALIVE=3/Deceased.</p>
<b>246</b>	<b>ORPEvent</b>	<p>Existing Event Date is outside survey reference period =          EVNT.EVORPFLAG = 1/ORP.</p> <p>New event is Out of the Survey Reference Period =          See general specifications for Date check logic for          determing ORP events.</p>

### DESIGN NOTES

---

Interviewer can only select events to be edited at this roster.

**ST36**

Page Order # : 600

Design Screen Type: Code 1

Fields: Field 1: STOMADD

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: (ST CLAIM HEADER)  
 SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
 TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

Int. Instr I:

Question Text:

Int. Instr II: WHAT TYPE OF OTHER MEDICAL EXPENSE NEEDS TO BE  
 ADDED?

**INPUT FIELDS / ROUTING**

---



**Field1:** STOMADD ( STQ1800 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TSTOMAdd

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	Glasses <b>English text:</b> GLASSES/CONTACTS	OM2 - EVENT_OMEYEG ( OMQ1030 )
2	Hearing <b>English text:</b> HEARING/SPEECH DEVICE	OM4 - EVENT_OMHEAR ( OMQ1110 )
3	Orthopedic <b>English text:</b> ORTHOPEDIC ITEM	OM6 - ORTHTYPE ( OMQ1220 )
4	DiabeticSupplies <b>English text:</b> DIABETIC SUPPLIES	OM10 - EVENT_OMDIAB ( OMQ1570 )
5	Ambulance <b>English text:</b> AMBULANCE/RESCUE	OM12 - EVENT_OMAMBL ( OMQ1640 )
6	Prothesis <b>English text:</b> PROSTHESIS	OM14 - EVENT_OMPROS ( OMQ1710 )
7	Alteration <b>English text:</b> ALTERATIONS (HOME/CAR)	OM29 - ALTRTYPE ( OMQ3040 )
8	Oxygen <b>English text:</b> OXYGEN	OM19A - OXGNTYPE ( OMQ1830 )
9	KidneyDialysis <b>English text:</b> KIDNEY DIALYSIS	OM21A - KDNYPYTYPE ( OMQ2240 )
10	OtherMedical <b>English text:</b> ALL OTHER MEDICAL SUPPLIES	OM24 - OTHRTYPE ( OMQ2650 )

#### BACKGROUND VARIABLE ASSIGNMENTS

#### SOFT EDIT CHECKS

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

ST36 calls Other Medical Expense Section. Multiple OMs for type selected at ST36 may be added in OM section. EVNT records will be identified or created for Other Medical Expenses added in OM section.

OM returns to ST at BOX ST36.

# BOX ST36

Page Order # : 610

## BOX INSTRUCTIONS

---

( STQ1810 ) GO TO ST34 - STOMUPD ( STQ1790 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

## DESIGN NOTES

---

Return to ST from Other Medical Expense Section.

# ST37

Page Order # : 612

**Design Screen Type:** Roster

**Fields:** **Field 1:** **EVENT\_STOM**

**Enable Functions:**  
**HELP** No  
**COMMENTS** Yes  
**JUMPBACK** Yes

**Roster Name:** Statement OM Roster

**Roster Type:** Multiple Item Select

**Roster Functions:**  
**Add Item** No  
**Edit Item** No  
**Delete Item** No  
**Search Item** No

**Grid Functions:**  
**Add Line** No  
**Delete Line** No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:**

**Question display:**

**Multi Field display:**

**Roster/Grid Instructions:** Display all other medical expense items where:

EVNT.EVNTDFLG^=1/Yes, and  
 EVNT.EVNTTYPE = OM.

Display in order of entry.

**Roster/Grid display:**

COL #	HEADER	INSTRUCTIONS
1		If EVNT.RENTPROB=2/Rent and ((EVNT.RENT2BUY ^= 2/PurchasedRentToBuy) or (EVNT.RENT2BUY = EMPTY)), display "R". Else do not display.
2	OME Type	If EVNT.STOMTYPE = 91/Other, display Other Specify Text, EVOS.EVOSTEXT, on EVOS where EVOS.EVOSEVNT = this EVNT.EVENTNUM. Else display EVNT.STOMTYPE response text.

**ST37**

<b>3</b>	Purchase or Repair/Rental Date	If ((EVNT.OTHRTYPE ^= 5/OstomySupplies and ^= 6/IncontinenceSupplies & ^= 7/Bandages) or (EVNT.OTHRTYPE = EMPTY)) & ((EVNT.OMSTATUS ^= 1/AlterationNotComplete) or (EVNT.OMSTATUS = EMPTY)), display EVENT DATE in "Mon DD YYYY" format. Else do not display.
<b>4</b>	Rental Stop Date	If EVNT.RENTPROB = 2/Rent and (EVNT.RENTSTIL = 2/No, DK, or RF) and ((EVNT.RENT2BUY ^= 2/PurchasedRentToBuy) or (EVNT.RENT2BUY = EMPTY)), display EVENT END DATE in "Mon DD YYYY" format. Else do not display.
<b>5</b>	Status	If EVNT.OMSTATUS = 1/AlterationNotComplete, display "ON". Else if EVNT.RENTSTIL = 1/Yes, display "RR". Else if EVNT.RENT2BUY = 2/PurchasedRentToBuy, display "OW". Else do not display.
<b>6</b>	Round	If ((EVNT.OTHRTYPE ^= 5/OstomySupplies and ^= 6/IncontinenceSupplies and ^= 7/Bandages) or (EVNT.OTHRTYPE = EMPTY)), display 'R' + EVNT.EVNTRNDC. EX: R45 Else do not display.
<b>7</b>		If Event Date is out of the Survey Reference Period, display "ORP". Else do not display.

**Report display:**

**TEXT:**

**Context Header:** (ST CLAIM HEADER)  
SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

**Int. Instr I:**

**Question Text:**

**Int. Instr II:** SELECT OTHER MEDICAL EXPENSES THAT ARE IN THIS CHARGE BUNDLE ON THE (TYPE OF STATEMENT).

**INPUT FIELDS / ROUTING**

**Field1:**                **EVENT\_STOM**                ( STQ1812 )

**Cheshire Name:**        TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

<b>Field Type:</b>	String	<b>FieldSize:</b>	135
<b>Type Name:</b>	TEvntPick135	<b>Min Value:</b>	
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	
<b>Drop Down List:</b>	No	<b>Mask:</b>	
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

Number	Label	Route
1	[Continuous answer.]	BOX ST37 - (STQ1813 )

#### BACKGROUND VARIABLE ASSIGNMENTS

Create an XCEV record for each event selected at ST37 to link the event to the charge bundle being asked about. XCEV record may already exist.

If XCEV record does not exist, create XCEV record:

XCEV key = XCEV.XCEVBASE + XCEV.XCEVCOST + XCEV.XCEVBAS2 + XCEV.XCEVEVNT  
 XCEV.XCEVBASE and XCEV.XCEVBAS2 = BASE.BASEID.  
 XCEV.XCEVCOST = COST.COSTNUM of charge bundle being asked about.  
 XCEV.XCEVEVNT = EVNT.EVNTNUM of event selected at ST37.

Set fields as specified below:

<b>XCEVCOST</b>	Create XCEV where XCEV.XCEVCOST = this COST.COSTNUM.
<b>XCEVEVNT</b>	Create XCEV where XCEV.XCEVEVNT = EVNT.EVNTNUM of EVNT selected.
<b>XCEVRNDC</b>	Set XCEV.XCEVRNDC = current round.
<b>DELLINK</b>	If XCEV exists and XCEV.DELLINK = 1/Yes, update XCEV.DELLINK = empty.

#### SOFT EDIT CHECKS

#### HARD EDIT CHECKS

#### TECHNICAL NOTES

<b>246</b>	<b>ORPEvent</b>	Existing Event Date is outside survey reference period = EVNT.EVORPFLAG = 1/ORP.
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**ST37**

New event is Out of the Survey Reference Period =  
See general specifications for Date check logic for  
determining ORP events.

**DESIGN NOTES**

---

Interviewer can only select events at this roster.

**BOX ST37**

Page Order # : 615

**BOX INSTRUCTIONS**

---

( STQ1813 ) IF AT LEAST ONE OTHER MEDICAL EXPENSE SELECTED AT ST37 IS RENTED, GO TO ST38 - MONTHCOV ( STQ1815 ).  
  
ELSE GO TO BOX ST38B - (STQ1820 ).

**ASSIGNMENTS**

---

**TECHNICAL NOTES**

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<b>242</b>	<b>OMRental</b>	Other Medical Expense Item is Rented = EVNT.RENTPROB = 2/Rent.
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**DESIGN NOTES**

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**ST38**

Page Order # : 618

Design Screen Type: Numeric

Fields:                   **Field 1:**           **MONTHCOV**  
                               **Field 2:**           **MONCOV96**

Enable Functions:       **HELP**               No  
                               **COMMENTS**       Yes  
                               **JUMPBACK**       No

Roster Name:

Roster Type:

Roster Functions:       **Add Item**           No  
                               **Edit Item**           No  
                               **Delete Item**       No  
                               **Search Item**       No

Grid Functions:         **Add Line**           No  
                               **Delete Line**       No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:**   Display the date and OME ITEM TYPE for the ST37 Rental event being asked about.

**Question display:**

**Multi Field display:**       Vertical Alignment  
                                       Display all fields at one time.

**Roster/Grid Instructions:****Roster/Grid display:****Report display:****TEXT:**

---

**Context Header:**           (ST CLAIM HEADER)  
                                   OME ITEM TYPE: (OME ITEM TYPE)  
                                   RENTAL DATES: (RENTAL START DATE) - (RENTAL STOP DATE)

**Int. Instr I:****Question Text:**

**Int. Instr II:**               HOW MANY MONTHS ARE COVERED BY THIS CHARGE BUNDLE?

**INPUT FIELDS / ROUTING**

---

**Field1:** MONTHCOV ( STQ1815 )

**Cheshire Name:** XCEV.MONTHCOV

**Item Text display:**

**Item Text:**

**Label:** MONTHS:  
**Label Position:** Left

**Field Type:** Integer **FieldSize:**  
**Type Name:** TMonthcov **Min Value:** 1  
**Answers Allowed:** 1 **Max Value:** 72  
**Drop Down List:** No **Mask:**  
**Lookup File:** No  
**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	ST38 - MONCOV96 ( STQ1816 )

Attribute	Route
Empty	ST38 - MONCOV96 ( STQ1816 )

Don't know	ST38 - MONCOV96 ( STQ1816 )
------------	-----------------------------

Refusal	ST38 - MONCOV96 ( STQ1816 )
---------	-----------------------------

**Field2:** MONCOV96 ( STQ1816 )

**Cheshire Name:** NONE

WE NEED TO TRANSFORM MONCOV96=1 BACK TO XCEV.MONTHCOV=96.

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TMonCov96

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	LessThanOneMonth	BOX ST38A - (STQ1817 )
English text: LESS THAN 1 MONTH		

Attribute	Route
Empty	BOX ST38A - (STQ1817 )

#### BACKGROUND VARIABLE ASSIGNMENTS

Collect # of months on XCEV:

XCEV key = XCEV.XCEVBASE + XCEV.XCEVCOST + XCEV.XCEVBAS2 + XCEV.XCEVEVNT  
 XCEV.XCEVCOST = COST.COSTNUM of charge bundle being asked about.  
 XCEV.XCEVEVNT = EVNT.EVNTNUM of OM Rental event being asked about.

#### SOFT EDIT CHECKS

#### HARD EDIT CHECKS

Edit #1

ST38 - MONTHCOV and ST38 - MONCOV96 cannot both be EMPTY.

If not true, display message "ENTRY REQUIRED. PLEASE ENTER NUMBER OF MONTHS OR SELECT "LESS THAN 1 MONTH".

Edit #2

ST38 - MONTHCOV and ST38 - MONCOV96 cannot both be FILLED.

If not true, display message "INVALID ENTRY. PLEASE ENTER

**ST38**

NUMBER OF MONTHS OR SELECT "LESS THAN 1 MONTH".

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

# BOX ST38A

Page Order # : 620

## BOX INSTRUCTIONS

---

( STQ1817 ) IF ANOTHER OTHER MEDICAL EXPENSE SELECTED AT ST37 IS RENTED, GO TO ST38 - MONTHCOV ( STQ1815 ).  
  
ELSE GO TO BOX ST38B - (STQ1820 ).

## ASSIGNMENTS

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## TECHNICAL NOTES

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242	OMRental	Other Medical Expense Item is Rented = EVNT.RENTPROB = 2/Rent.
-----	----------	-------------------------------------------------------------------

## DESIGN NOTES

---

# BOX ST38B

Page Order # : 622

## BOX INSTRUCTIONS

---

( STQ1820 ) IF AT LEAST ONE OTHER MEDICAL EXPENSE SELECTED AT ST37 IS OSTOMY SUPPLIES, INCONTINENCE SUPPLIES OR BANDAGES, GO TO ST38A - NUMLINKS ( STQ1821 ).

ELSE GO TO ST39 - STOMMTCH ( STQ1830 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

<b>247</b>	<b>OMPurchases</b>	Other Medical Expense Item is Ostomy Supplies, Incontinence Supplies, or Bandages = EVNT.OTHRTYPE = 5/OstomySupplies, 6/IncontinenceSupplies, or 7/Bandages.
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## DESIGN NOTES

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# ST38A

Page Order # : 625

Design Screen Type: Numeric

Fields: Field 1: NUMLINKS

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:** Display the date and OME ITEM TYPE for the ST37 Ostomy Supplies, Incontinence Supplies, or Bandages being asked about.

**Question display:**

**Multi Field display:**

**Roster/Grid Instructions:**

**Roster/Grid display:**

**Report display:**

**TEXT:**

---

**Context Header:** (ST CLAIM HEADER)  
OME ITEM TYPE: (OME ITEM TYPE)

**Int. Instr I:**

**Question Text:**

**Int. Instr II:** HOW MANY PURCHASES OF (NAME OF OME ITEM) ARE COVERED BY THIS CHARGE BUNDLE?

**INPUT FIELDS / ROUTING**

---

**Field1:** NUMLINKS ( STQ1821 )

**Cheshire Name:** XCEV.NUMLINKS

**Item Text display:**

**Item Text:**

**Label:** NUMBER OF PURCHASES:  
**Label Position:** Left

**Field Type:** Integer **FieldSize:**  
**Type Name:** TNumlinks **Min Value:** 1  
**Answers Allowed:** 1 **Max Value:** 100  
**Drop Down List:** No **Mask:**  
**Lookup File:** No  
**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	BOX ST38AA - (STQ1822 )

Attribute	Route
Don't know	BOX ST38AA - (STQ1822 )

Refusal	BOX ST38AA - (STQ1822 )
---------	-------------------------

**BACKGROUND VARIABLE ASSIGNMENTS**

Collect # of purchases on XCEV:

XCEV key = XCEV.XCEVBASE + XCEV.XCEVCOST + XCEV.XCEVBAS2 + XCEV.XCEVEVNT  
 XCEV.XCEVCOST = COST.COSTNUM of charge bundle being asked about.  
 XCEV.XCEVEVNT = EVNT.EVNTNUM of OM Ostomy Supplies, Incontinence supplies, or bandages being asked about.

ST38A is asked of all Ostomy Supplies, Incontinence Supplies and Bandages linked to charge bundle.

However, in addition to collecting the number of purchases covered by the charge bundle at ST38A, if the OM event was added at OM24 - OTHRTYPE, we will copy ST38A - NUMLINKS to the current round PMRO.GETNUM on PMRO where PMRO.PMRORND = current round and PMRO.PMROEVNT = this new OM event.

**GETNUM** If OM event was just added at OM24 - OTHRTYPE, set PMRO.GETNUM = this OM event's ST38A - NUMLINKS. Set on PMRO where PMRO.PMROEVNT = this OM EVNT.EVNTNUM and PMRO.PMRORND = current round.

**SOFT EDIT CHECKS**



**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

# BOX ST38AA

Page Order # : 628

## BOX INSTRUCTIONS

---

( STQ1822 ) IF ANOTHER OTHER MEDICAL EXPENSE SELECTED AT ST37 IS OSTOMY SUPPLIES, INCONTINENCE SUPPLIES OR BANDAGES, GO TO ST38A - NUMLINKS ( STQ1821 ).  
  
ELSE GO TO ST39 - STOMMTCH ( STQ1830 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

<b>247</b>	<b>OMPurchases</b>	Other Medical Expense Item is Ostomy Supplies, Incontinence Supplies, or Bandages = EVNT.OTHRTYPE = 5/OstomySupplies, 6/IncontinenceSupplies, or 7/Bandages.
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## DESIGN NOTES

---

**ST39**

Page Order # : 630

Design Screen Type: Code 1

Fields: Field 1: STOMMTCH

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display: Display report below question text.

Display all Events linked to this charge bundle where XCEV.XCEVEVNT = the EVNT.EVNTNUM and XCEV.XCEVCOST = the COST.COSTNUM for the Charge Bundle and XCEV.DELLINK ^=1/Yes. Display PMs followed by OM events, HH events and then other provider service events.

NOTE: This report is shared by other questions. Not all Event types will be applicable at each screen.

Report header: EVENTS IN CHARGE BUNDLE

Report layout:

Column 1, header =Type

Display EVNT.EVNTTYPE

Column 2, NO HEADER.

If EVNT.RENTPROB=2/Rent and ((EVNT.RENT2BUY ^= 2/PurchasedRentToBuy) or (EVNT.RENT2BUY = EMPTY)), display

"R".

Else do not display.

Column 3, header = Description

If EVNT.EVNTTYPE = OM then

If EVNT.STOMTYPE = 91, display EVOS.EVOSTEXT on EVOS  
where EVOS.EVOSEVNT = this EVNT.EVNTNUM.

Else display EVNT.STOMTYPE response text.

Else if EVNT.EVNTTYPE = PM, display EVNT.PMEDNAME.

Else display PROV.PROVNAME on PROV where PROV.PROVNUM  
= this EVNT.EVNTPROV.

Column 4, header = Start Date

If EVNT.EVNTTYPE = HF or HP,

display COST START DATE in "Mon DD YYYY" format.

Else if (EVNT.EVNTTYPE = DU, ER, IP, IU, OP, MP, SD or SL) or

(EVNT.EVNTTYPE = OM and  
((EVNT.OTHRTYPE ^= 5/OstomySupplies and  
^= 6/IncontinenceSupplies and ^= 7/Bandages) or  
(EVNT.OTHRTYPE = EMPTY)) and  
((EVNT.OMSTATUS ^= 1/AlterationNotComplete) or  
(EVNT.OMSTATUS = EMPTY))),

display EVENT DATE in "Mon DD YYYY" format.

Else do not display.

Column 5, header = Stop Date

If EVNT.EVNTTYPE = HF or HP,

display COST STOP DATE in "Mon DD YYYY" format.

Else if (EVNT.EVNTTYPE = IU) or

(EVNT.EVNTTYPE = IP and  
EVNT.IPSTATUS ^= 1/StillInHospital) or

(EVNT.EVNTTYPE = OM and EVNT.RENTPROB = 2/Rent and  
(EVNT.RENTSTIL = 2/No, DK, or RF) and  
((EVNT.RENT2BUY ^= 2/PurchasedRentToBuy) or  
(EVNT.RENT2BUY = EMPTY))),

display EVNT END DATE in "Mon DD YYYY" format.

Else do not display.

Column 6, header = Status

If EVNT.VISTTYPE = 2/RepeatVisit, display "RV".

Else if

(EVNT.EVNTTYPE = OM and  
EVNT.OMSTATUS = 1/AlterationNotComplete) or

(EVNT.EVNTTYPE = IP and EVNT.IPSTATUS =  
1/StillInHospital),

display "ON".

Else if EVNT.RENTSTIL = 1/Yes, display "RR".

Else if EVNT.RENT2BUY=2/PurchasedRentToBuy, display "OW".

Else do not display.

Column 7, header = # Visits

If EVNT.VISTTYPE = 2/RepeatVisit, display XCEV.RVLINKS on XCEV where XCEV.XCEVEVNT = this EVNT.EVENTNUM and XCEV.XCEVCOST = the COST.COSTNUM for this charge bundle.

Else do not display.

Column 8, header = # Purchases

If (EVNT.EVENTTYPE = PM) or (EVNT.EVENTTYPE = OM and (EVNT.OTHRTYPE = 5/OstomySupplies, 6/IncontinenceSupplies, or 7/Bandages)),

display XCEV.NUMLINKS on XCEV where XCEV.XCEVEVNT = this EVNT.EVENTNUM and XCEV.XCEVCOST = the COST.COSTNUM for this charge bundle.

Else do not display.

Column 9,

If Event Date is out of Survey Reference Period, display "ORP".

Else do not display.

**TEXT:** -----

**Context Header:**

(ST CLAIM HEADER)  
SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

**Int. Instr I:**

ARE ALL THE OTHER MEDICAL EXPENSES FROM THE CHARGE BUNDLE ON THE (TYPE OF STATEMENT) SHOWN BELOW?

**Question Text:**

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

---

**Field1:** STOMMTCH ( STQ1830 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated  
**Type Name:** TSTOMMTCH  
**Answers Allowed:** 1  
**Drop Down List:** No  
**Lookup File:** No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:**  
**Max Value:**  
**Mask:**

Number	Label	Route
1	Yes	BOX ST40 - ( STQ1840 )
	<b>English text:</b> YES	
2	NoAddOM	ST34 - STOMUPD ( STQ1790 )
	<b>English text:</b> NO, NEED TO ADD AN OME EVENT	
3	NoDeleteOM	ST40 - EVENT_STOMDEL ( STQ1835 )
	<b>English text:</b> NO, NEED TO REMOVE AN OME EVENT	

#### BACKGROUND VARIABLE ASSIGNMENTS

---

#### SOFT EDIT CHECKS

---

#### HARD EDIT CHECKS

---

#### TECHNICAL NOTES

---

**246**      **ORPEvent**      Existing Event Date is outside survey reference period =  
EVNT.EVORPFLAG = 1/ORP.

New event is Out of the Survey Reference Period =  
See general specifications for Date check logic for  
determining ORP events.

#### DESIGN NOTES

---

**ST40**

Page Order # : 635

Design Screen Type: Roster

Fields: Field 1: EVENT\_STOMDEL

Enable Functions:      **HELP**                      No  
                                  **COMMENTS**                      No  
                                  **JUMPBACK**                      No

Roster Name: Statement OM Roster

Roster Type: Multiple Item Select

Roster Functions:      **Add Item**                      No  
                                  **Edit Item**                      No  
                                  **Delete Item**                      No  
                                  **Search Item**                      No

Grid Functions:        **Add Line**                      No  
                                  **Delete Line**                      No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:****Question display:** Always display "(S)" in interviewer instructions in parenthesis.**Multi Field display:****Roster/Grid Instructions:** Display all OME events linked to this charge bundle:

There is an EVNT where:  
 EVNT.EVNTTYPE = 'OM', and

There is an XCEV where:  
 XCEV.XCEVEVNT = this EVNT.EVNTNUM, and  
 XCEV.XCEVCOST = COST.COSTNUM for this charge bundle, and  
 XCEV.DELLINK ^= 1/Yes.

Display in order of entry.

<b>Roster/Grid display:</b>	<b>COL #</b>	<b>HEADER</b>	<b>INSTRUCTIONS</b>
	1		If EVNT.RENTPROB=2/Rent and EVNT.RENT2BUY ^= 2/PurchasedRentToBuy, display "R". Else do not display.

**ST40**

2	OME Type	If EVNT.STOMTYPE = 91/Other, display Other Specify Text, EVOS.EVOSTEXT, on EVOS where EVOS.EVOSEVNT = this EVNT.EVNTNUM. Else display EVNT.STOMTYPE response text.
3	Purchase or Repair/Rental Date	If (EVNT.OTHRTYPE ^= 5/OstomySupplies and EVNT.OTHRTYPE ^= 6/IncontinenceSupplies and EVNT.OTHRTYPE ^= 7/Bandages) and (EVNT.OMSTATUS ^= 1/AlterationNotComplete), display EVENT DATE in "Mon DD YYYY" format. Else do not display.
4	Rental Stop Date	if (EVNT.RENTSTIL = 2/No, DK, or RF) and (EVNT.RENT2BUY ^= 2/PurchasedRentToBuy), display EVENT END DATE in "Mon DD YYYY" format. Else do not display.
5	Status	If EVNT.OMSTATUS = 1/AlterationNotComplete, display "ON". Else if EVNT.RENTSTIL = 1/Yes, display "RR". Else if EVNT.RENT2BUY = 2/PurchasedRentToBuy, display "OW". Else do not display.
6	# Purchases	If (EVNT.OTHRTYPE = 5/OstomySupplies, 6/IncontinenceSupplies, or 7/Bandages), display XCEV.NUMLINKS on XCEV where XCEV.XCEVEVNT = this EVNT.EVNTNUM and XCEV.XCEVCOST = this COST.COSTNUM. Else do not display.
7	Round	If (EVNT.OTHRTYPE ^= 5/OstomySupplies and EVNT.OTHRTYPE ^= 6/IncontinenceSupplies and EVNT.OTHRTYPE ^= 7/Bandages), 7/Bandages, display 'R' + EVNT.EVNRNDNC. EX: R45 Else do not display.
8		If Event Date is out of the Survey Reference Period, display "ORP". Else do not display.

**Report display:**

**TEXT:** -----

**Context Header:**

(ST CLAIM HEADER)  
SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

**Int. Instr I:**



**Question Text:**

**Int. Instr II:** SELECT THE EVENT(S) THAT YOU WOULD LIKE TO REMOVE FROM THE CHARGE BUNDLE.

**INPUT FIELDS / ROUTING**

---

**Field1:** EVENT\_STOMDEL ( STQ1835 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** String **FieldSize:** 135  
**Type Name:** TEvntPick135 **Min Value:**  
**Answers Allowed:** 1 **Max Value:**  
**Drop Down List:** No **Mask:**  
**Lookup File:** No  
**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	ST39 - STOMMTCH ( STQ1830 )

---

**BACKGROUND VARIABLE ASSIGNMENTS**

---

Roster details will be collected on XCEV:

XCEV key = XCEV.XCEVBASE + XCEV.XCEVCOST + XCEV.XCEVBAS2 + XCEV.XCEVEVNT  
 XCEV.XCEVBASE and XCEV.XCEVBAS2 = BASE.BASEID.  
 XCEV.XCEVCOST = COST.COSTNUM of charge bundle being asked about.  
 XCEV.XCEVEVNT = EVNT.EVNTNUM of event selected at ST40

Each Event selected at ST40 will be flagged as "deleted" on XCEV. The event will no longer being "linked" to the charge bundle being asked about. See detailed instructions below.

**DELLINK** Set XCEV.DELLINK = 1/Yes on XCEV where XCEV.XCEVCOST = this COST.COSTNUM and XCEV.XCEVEVNT = EVNT.EVNTNUM of event selected.

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**ST40**

**246 ORPEvent**

Existing Event Date is outside survey reference period =  
EVNT.EVORPFLAG = 1/ORP.

New event is Out of the Survey Reference Period =  
See general specifications for Date check logic for  
determining ORP events.

**DESIGN NOTES**

---

Interviewer can only select events at this roster.

**BOX ST40**

**BOX INSTRUCTIONS**

---

( STQ1840 ) IF ST12 – INCTYPE INCLUDES 4/PMS, GO TO ST41 - EVENT\_STPM ( STQ1850 ).  
ELSE GO TO BOX ST45 - (STQ1990 ).

**ASSIGNMENTS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

**ST41**

Page Order # : 650

Design Screen Type: Roster

Fields: Field 1: EVENT\_STPM

Enable Functions: HELP No  
 COMMENTS Yes  
 JUMPBACK Yes

Roster Name: Prescription Medicine Roster

Roster Type: Multiple Item Select

Roster Functions: Add Item Yes Display as ' Add a Medicine '  
 Edit Item Yes Display as ' Edit a Medicine '  
 Delete Item No  
 Search Item No

Grid Functions: Add Line No  
 Delete Line No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions: Display all Prescription Medicine events where:

EVNT.EVNTDFLG ^=1/Yes, and  
 EVNT.EVNTTYPE='PM'.

Display in alphabetical order.

Roster/Grid display:

**COL #      HEADER****INSTRUCTIONS**

1      Medicine

Display prescription medicine name,  
EVNT.PMEDNAME.

2      Strength

Display prescription medicine strength  
text field, EVNT.PMSTRUNI.

Report display:

**TEXT:**

---

Context Header:

(ST CLAIM HEADER)  
 SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
 TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

Int. Instr I:

**Question Text:**

**Int. Instr II:** SELECT OR ADD ALL PRESCRIPTION MEDICINES THAT ARE IN THIS CHARGE BUNDLE ON THE (TYPE OF STATEMENT).

**INPUT FIELDS / ROUTING**

---

**Field1:** EVENT\_STPM ( STQ1850 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** String **FieldSize:** 200  
**Type Name:** TEvntPick200 **Min Value:**  
**Answers Allowed:** 1 **Max Value:**  
**Drop Down List:** No **Mask:**  
**Lookup File:** No  
**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	ST42 - NUMLINKS ( STQ1860 )

---

**BACKGROUND VARIABLE ASSIGNMENTS**

---

Roster details will be collected on EVNT:

EVNT key = EVNT.EVNTBASE + EVNT.EVNTNUM  
 EVNT.EVNTNUM = Number of PM event selected at ST41.

If Prescription Medicine added at Prescription Medicine Roster, see PRESCRIPTION MEDICINE ROSTER POP-UP specifications for pop-up window programming instructions.

Variables populated at the Prescription Medicine Roster:

EVNT.EVNTNUM Event number  
 EVNT.EVNTRNDC Round number  
 EVNT.EVNTTYPE PM  
 EVNT.PMEDNAME Prescription Medicine name  
 EVNT.PMSTRUNI Prescription Medicine strength text field  
 EVNT.EVNTPROV 02  
 BASE.LASTEVRT Highest EVNT.EVNTNUM

If PM added at ST41, create a current round PMRO:

PMRO key = PMRO.PMROBASE + PMRO.PMROEVNT + PMRO.PMRORND  
 PMRO.PMROEVNT = EVNT.EVNTNUM of PM event selected at ST41.  
 PMRO.PMRORND = current round.

## ST41

Set PMRO fields as specified below.

FOR ALL PM'S SELECTED AT ST41 ("SELECTED" refers to any PM selected from Roster, whether or not PM was just ADDED or PRE-EXISTED on the roster), create an XCEV record for each PM event selected at ST41 to link the event to the charge bundle being asked about. XCEV record may already exist.

If XCEV record does not exist, create XCEV record:

XCEV key = XCEV.XCEVBASE + XCEV.XCEVCOST + XCEV.XCEVBAS2 + XCEV.XCEVEVNT

XCEV.XCEVBASE and XCEV.XCEVBAS2 = BASE.BASEID.

XCEV.XCEVCOST = COST.COSTNUM of charge bundle being asked about.

XCEV.XCEVEVNT = EVNT.EVNTNUM of PM event selected at ST41.

Set fields as specified below:

<b>PMROEVNT</b>	If PM added at ST41, create PMRO where PMRO.PMROEVNT = EVNT.EVNTNUM of event added.
<b>PMRORND</b>	If PM added at ST41, create PMRO where PMRO.PMRORND = current round.
<b>PMROTYPE</b>	If PM added at ST41, set PMRO.PMROTYPE = PM.
<b>EVCHGFLG</b>	If PM added at ST41, set EVNT.EVCHGFLG = 1/Yes.
<b>XCEVCOST</b>	For each PM selected at ST41, create XCEV where XCEV.XCEVCOST = this COST.COSTNUM.
<b>XCEVEVNT</b>	For each PM selected at ST41, create XCEV where XCEV.XCEVEVNT = EVNT.EVNTNUM of PM selected (or added).
<b>XCEVRNDC</b>	Set XCEV.XCEVRNDC = current round.
<b>DELLINK</b>	If XCEV exists and XCEV.DEVNTNUM = 1/Yes, update XCEV.DEVNTNUM = empty.

### SOFT EDIT CHECKS

---

### HARD EDIT CHECKS

---

### TECHNICAL NOTES

---

### DESIGN NOTES

---

Interviewer can add and/or select PMs at this roster. We do not create PMROs for existing PMs that are selected.

**ST42**

Page Order # : 660

Design Screen Type: Grid

Fields: **Field 1: NUMLINKS**

Enable Functions: **HELP** No  
**COMMENTS** No  
**JUMPBACK** No

Roster Name:

Roster Type:

Roster Functions: **Add Item** No  
**Edit Item** No  
**Delete Item** No  
**Search Item** No

Grid Functions: **Add Line** No  
**Delete Line** No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

**Roster/Grid Instructions:** Display all Prescription Medicine events linked to this charge bundle:

There is an EVNT where:  
EVNT.EVNTTYPE = 'PM', and

There is an XCEV where:  
XCEV.XCEVEVNT = this EVNT.EVNTNUM, and  
XCEV.XCEVCOST = COST.COSTNUM for this charge bundle, and  
XCEV.DELLINK ^= 1/Yes.

Display in alphabetical order based on EVNT.PMEDNAME.

Roster/Grid display:	COL #	HEADER	INSTRUCTIONS
	1	Medicine Name	Display the name and strength of the medicine, EVNT.PMEDNAME + ' ' + EVNT.PMSTRUNI. Display only.
	2	# Purchases	XCEV.NUMLINKS. Input column 1.

Report display:

**TEXT:**

---

**Context Header:** (ST CLAIM HEADER)  
 SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
 TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

**Int. Instr I:**

**Question Text:**

**Int. Instr II:** HOW MANY PURCHASES OF EACH MEDICINE SHOWN BELOW  
 ARE COVERED BY THIS CHARGE BUNDLE?

**INPUT FIELDS / ROUTING**

---

**Field1:** NUMLINKS ( STQ1860 )

**Cheshire Name:** XCEV.NUMLINKS

**Item Text display:** GRID COLUMN #2.

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Integer **FieldSize:**  
**Type Name:** TNumlinks **Min Value:** 1  
**Answers Allowed:** 1 **Max Value:** 100  
**Drop Down List:** No **Mask:**  
**Lookup File:** No  
**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	BOX ST42 - (STQ1880 )

Attribute	Route
Don't know	BOX ST42 - (STQ1880 )

Refusal	BOX ST42 - (STQ1880 )
---------	-----------------------

**BACKGROUND VARIABLE ASSIGNMENTS**

---

Collect # of purchases on XCEV:

XCEV key = XCEV.XCEVBASE + XCEV.XCEVCOST + XCEV.XCEVBAS2 +  
 XCEV.XCEVEVNT  
 XCEV.XCEVCOST = COST.COSTNUM of charge bundle being asked about.  
 XCEV.XCEVEVNT = EVNT.EVNTNUM of PM being asked about.

**GETNUM** If PM was added at ST41, set PMRO.GETNUM =  
 this PM event"s ST42 - NUMLINKS. Set on PMRO  
 where PMRO.PMROEVNT = this PM  
 EVNT.EVNTNUM and PMRO.PMRORND = current  
 round.



**SOFT EDIT CHECKS**

---

NUMLINKS = 1 - 8. DK, or RF.  
If not true, display message "THE AMOUNT ENTERED SEEMS  
UNLIKELY. PLEASE VERIFY."

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

# BOX ST42

Page Order # : 670

## BOX INSTRUCTIONS

---

( STQ1880 ) IF AT LEAST ONE PRESCRIPTION MEDICINE WAS ADDED AT ST41, GO TO ST43 - STPMINTRO ( STQ1920 ).  
  
ELSE GO TO ST44 - STPMMTCH ( STQ1941 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

## DESIGN NOTES

---

BOX ST42 should only route to ST43 if PM was added as a new PM event at ST41, not if the PM already existed on roster and was selected.

**ST43**

Page Order # : 710

Design Screen Type: No Entry

Fields: Field 1: STPMINTRO

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display: Always display "(s)" in parenthesis.

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header:

Int. Instr I:

Question Text: Before we continue with this statement, I would like to ask you a few questions about the prescribed medicine(s) I just added. [It would be very helpful for the following questions if we could look at the bottle(s) or container(s) for the medicine(s).]

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:** STPMINTRO ( STQ1920 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TContinueEMPTY

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	Continue	PM6A_IN - NAVIGATOR ( PMQ1173 )
English text: CONTINUE		

Attribute	Route
Empty	PM6A_IN - NAVIGATOR ( PMQ1173 )

#### BACKGROUND VARIABLE ASSIGNMENTS

---

#### SOFT EDIT CHECKS

---

#### HARD EDIT CHECKS

---

#### TECHNICAL NOTES

---

#### DESIGN NOTES

---

ST43 calls PM section. PM will collect event details for all PMs added at ST41.

PM returns to ST at BOX ST43.

# **BOX ST43**

**Page Order # :** 720

## **BOX INSTRUCTIONS**

---

( STQ1930 ) GO TO ST44 - STPMMTCH ( STQ1941 ).

## **ASSIGNMENTS**

---

## **TECHNICAL NOTES**

---

## **DESIGN NOTES**

---

Return from PM section at BOX ST43.

**ST44**

Page Order # : 730

Design Screen Type: Code 1

Fields: Field 1: STPMMTCH

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display: Display report below question text.

Display all Events linked to this charge bundle where XCEV.XCEVEVNT = the EVNT.EVNTNUM and XCEV.XCEVCOST = the COST.COSTNUM for the Charge Bundle and XCEV.DELLINK ^=1/Yes. Display PMs followed by OM events, HH events and then other provider service events.

NOTE: This report is shared by other questions. Not all Event types will be applicable at each screen.

Report header: EVENTS IN CHARGE BUNDLE

Report layout:

Column 1, header =Type

Display EVNT.EVNTTYPE

Column 2, NO HEADER.

If EVNT.RENTPROB=2/Rent and ((EVNT.RENT2BUY ^= 2/PurchasedRentToBuy) or (EVNT.RENT2BUY = EMPTY)), display

"R".

Else do not display.

Column 3, header = Description

If EVNT.EVNTTYPE = OM then

If EVNT.STOMTYPE = 91, display EVOS.EVOSTEXT on EVOS  
where EVOS.EVOSEVNT = this EVNT.EVNTNUM.

Else display EVNT.STOMTYPE response text.

Else if EVNT.EVNTTYPE = PM, display EVNT.PMEDNAME.

Else display PROV.PROVNAME on PROV where PROV.PROVNUM  
= this EVNT.EVNTPROV.

Column 4, header = Start Date

If EVNT.EVNTTYPE = HF or HP,

display COST START DATE in "Mon DD YYYY" format.

Else if (EVNT.EVNTTYPE = DU, ER, IP, IU, OP, MP, SD or SL) or

(EVNT.EVNTTYPE = OM and  
((EVNT.OTHRTYPE ^= 5/OstomySupplies and  
^= 6/IncontinenceSupplies and ^= 7/Bandages) or  
(EVNT.OTHRTYPE = EMPTY)) and  
((EVNT.OMSTATUS ^= 1/AlterationNotComplete) or  
(EVNT.OMSTATUS = EMPTY))),

display EVENT DATE in "Mon DD YYYY" format.

Else do not display.

Column 5, header = Stop Date

If EVNT.EVNTTYPE = HF or HP,

display COST STOP DATE in "Mon DD YYYY" format.

Else if (EVNT.EVNTTYPE = IU) or

(EVNT.EVNTTYPE = IP and  
EVNT.IPSTATUS ^= 1/StillInHospital) or

(EVNT.EVNTTYPE = OM and EVNT.RENTPROB = 2/Rent and  
(EVNT.RENTSTIL = 2/No, DK, or RF) and  
((EVNT.RENT2BUY ^= 2/PurchasedRentToBuy) or  
(EVNT.RENT2BUY = EMPTY))),

display EVNT END DATE in "Mon DD YYYY" format.

Else do not display.

Column 6, header = Status

If EVNT.VISTTYPE = 2/RepeatVisit, display "RV".

Else if

(EVNT.EVNTTYPE = OM and  
EVNT.OMSTATUS = 1/AlterationNotComplete) or

(EVNT.EVNTTYPE = IP and EVNT.IPSTATUS =  
1/StillInHospital),

display "ON".

Else if EVNT.RENTSTIL = 1/Yes, display "RR".

Else if EVNT.RENT2BUY=2/PurchasedRentToBuy, display "OW".

Else do not display.

Column 7, header = # Visits

If EVNT.VISTTYPE = 2/RepeatVisit, display XCEV.RVLINKS on XCEV where XCEV.XCEVEVNT = this EVNT.EVNTNUM and XCEV.XCEVCOST = the COST.COSTNUM for this charge bundle.

Else do not display.

Column 8, header = # Purchases

If (EVNT.EVNTTYPE = PM) or (EVNT.EVNTTYPE = OM and (EVNT.OTHRTYPE = 5/OstomySupplies, 6/IncontinenceSupplies, or 7/Bandages)),

display XCEV.NUMLINKS on XCEV where XCEV.XCEVEVNT = this EVNT.EVNTNUM and XCEV.XCEVCOST = the COST.COSTNUM for this charge bundle.

Else do not display.

Column 9,

If Event Date is out of Survey Reference Period, display "ORP".

Else do not display.

**TEXT:** -----

**Context Header:** (ST CLAIM HEADER)  
SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

**Int. Instr I:** ARE ALL THE PRESCRIBED MEDICINES FROM THE CHARGE BUNDLE ON THE (TYPE OF STATEMENT) SHOWN BELOW?

**Question Text:**

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

---



**Field1:** STPMMTCH ( STQ1941 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TSTPMMtch

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	Yes	BOX ST45 - (STQ1990 )
	<b>English text:</b> YES	
2	NoAddPM	ST41 - EVENT_STPM ( STQ1850 )
	<b>English text:</b> NO, NEED TO ADD A MEDICINE NAME	
3	NoDeletePM	ST45 - EVENT_STPMDEL ( STQ1951 )
	<b>English text:</b> NO, NEED TO REMOVE A MEDICINE NAME	

#### BACKGROUND VARIABLE ASSIGNMENTS

---

#### SOFT EDIT CHECKS

---

#### HARD EDIT CHECKS

---

#### TECHNICAL NOTES

---

**246**      **ORPEvent**      Existing Event Date is outside survey reference period =  
EVNT.EVORPFLAG = 1/ORP.

New event is Out of the Survey Reference Period =  
See general specifications for Date check logic for  
determining ORP events.

#### DESIGN NOTES

---

**ST45**

Page Order # : 740

Design Screen Type: Roster

Fields: Field 1: EVENT\_STPMDEL

Enable Functions:      **HELP**                      No  
                                  **COMMENTS**                      No  
                                  **JUMPBACK**                      No

Roster Name: Prescription Medicine Roster

Roster Type: Multiple Item Select

Roster Functions:      **Add Item**                      No  
                                  **Edit Item**                      No  
                                  **Delete Item**                      No  
                                  **Search Item**                      No

Grid Functions:        **Add Line**                      No  
                                  **Delete Line**                      No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:****Question display:** Always display "(S)" in interviewer instructions in parenthesis.**Multi Field display:****Roster/Grid Instructions:** Display all Prescription Medicine events linked to this charge bundle:

There is an EVNT where:  
 EVNT.EVNTTYPE = 'PM', and

There is an XCEV where:  
 XCEV.XCEVEVNT = this EVNT.EVNTNUM, and  
 XCEV.XCEVCOST = COST.COSTNUM for this charge bundle, and  
 XCEV.DELLINK ^= 1/Yes.

Display in alphabetical order based on EVNT.PMEDNAME.

Roster/Grid display:	COL #	HEADER	INSTRUCTIONS
	1	Medicine Name	Display name of PM, EVNT.PMEDNAME.
	2	# Purchases	Display XCEV.NUMLINKS on XCEV where XCEV.XCEVEVNT = this EVNT.EVNTNUM and XCEV.XCEVCOST = COST.COSTNUM for this charge bundle.

**Report display:**

**TEXT:**

**Context Header:** (ST CLAIM HEADER)  
 SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
 TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

**Int. Instr I:**

**Question Text:**

**Int. Instr II:** SELECT THE PRESCRIBED MEDICINE(S) THAT YOU WOULD  
 LIKE TO REMOVE FROM THE CHARGE BUNDLE.

**INPUT FIELDS / ROUTING**

**Field1:** EVENT\_STPMDEL ( STQ1951 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** String **FieldSize:** 135  
**Type Name:** TEvntPick135 **Min Value:**  
**Answers Allowed:** 1 **Max Value:**  
**Drop Down List:** No **Mask:**  
**Lookup File:** No  
**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	ST44 - STPMMTCH ( STQ1941 )

**BACKGROUND VARIABLE ASSIGNMENTS**

Roster details will be collected on XCEV:

XCEV key = XCEV.XCEVBASE + XCEV.XCEVCOST + XCEV.XCEVBAS2 +  
 XCEV.XCEVEVNT  
 XCEV.XCEVBASE and XCEV.XCEVBAS2 = BASE.BASEID.  
 XCEV.XCEVCOST = COST.COSTNUM of charge bundle being asked about.  
 XCEV.XCEVEVNT = EVNT.EVNTNUM of PM event selected at ST45.

Each PM Event selected at ST45 will be flagged as "deleted" on XCEV. The event will no longer being "linked" to the charge bundle being asked about. See detailed instructions below.

**DELLINK** Set XCEV.DEELLINK = 1/Yes on XCEV where  
 XGEV.XCEVCOST = this COST.COSTNUM and  
 XCEV.XCEVEVNT = EVNT.EVNTNUM of event  
 selected.

**SOFT EDIT CHECKS**

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

Interviewer can only select PMs at this roster.

# BOX ST45

## BOX INSTRUCTIONS

---

( STQ1990 ) IF ALL EVENT DATES SELECTED FOR THIS CHARGE BUNDLE ARE OUTSIDE THE SURVEY REFERENCE PERIOD, GO TO ST46 - ORPMESSAGE ( STQ2000 ).

ELSE GO TO BOX ST46 - (STQ2010 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

<b>246</b>	<b>ORPEvent</b>	Existing Event Date is outside survey reference period = EVNT.EVORPFLAG = 1/ORP.
		New event is Out of the Survey Reference Period = See general specifications for Date check logic for determining ORP events.

## DESIGN NOTES

---

**ST46**

Page Order # : 790

Design Screen Type: No Entry

Fields: Field 1: ORPMESSAGE

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: (ST CLAIM HEADER)  
 SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
 TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

Int. Instr I: SINCE ALL EVENTS IN THIS BUNDLE ARE OUTSIDE THE  
 SURVEY REFERENCE PERIOD, WE DO NOT NEED ANY  
 CHARGE INFORMATION ABOUT THE BUNDLE.

Question Text:

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:** ORPMESSAGE ( STQ2000 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TContinueEMPTY

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	Continue	BOX ST80 - (STQ2930 )
English text: CONTINUE		

Attribute	Route
Empty	BOX ST80 - (STQ2930 )

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

# **BOX ST46**

**Page Order # :** 800

## **BOX INSTRUCTIONS**

---

( STQ2010 ) IF (ST5 - STATTYPE = 2/Insurance, 4/Tricare, OR 6/TricareAndInsurance)  
OR (ST5 - MCARTYPE = 4/MSNPartB), GO TO ST47 - ASGNTAKE ( STQ2020 ).  
  
ELSE GO TO BOX ST47 - (STQ2050 ).

## **ASSIGNMENTS**

---

## **TECHNICAL NOTES**

---

## **DESIGN NOTES**

---



# ST47

Page Order # : 810

Design Screen Type: Code 1

Fields: Field 1: ASGNTAKE

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: (ST CLAIM HEADER)  
 EVENT: (CHARGE BUNDLE EVENT)  
 (CHARGE BUNDLE EVENT) (etc.)

Int. Instr I: WAS ASSIGNMENT TAKEN FOR THIS CHARGE BUNDLE?

Question Text:

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:** ASGNTAKE ( STQ2020 )

**Cheshire Name:** COST.ASGNTAKE

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TAsgntake

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	Yes	BOX ST47 - (STQ2050 )
	<b>English text:</b> YES	
2	No	BOX ST47 - (STQ2050 )
	<b>English text:</b> NO	
3	CantTell	BOX ST47 - (STQ2050 )
	<b>English text:</b> CAN'T TELL	

#### BACKGROUND VARIABLE ASSIGNMENTS

---

#### SOFT EDIT CHECKS

---

#### HARD EDIT CHECKS

---

If ST6 - MCARTYPE= 4/MSNPARTB. then (ST7 - ASGNTAKE = 1/Yes or 2/No).

If not true, display error message, "THE MSN SPECIFIES ASSIGNED OR UNASSIGNED. PLEASE REENTER OR PRESS "PREVIOUS PAGE" TO CORRECT YOUR ENTRY AT ST5".

#### TECHNICAL NOTES

---

#### DESIGN NOTES

---

# **BOX ST47**

## **BOX INSTRUCTIONS**

---

( STQ2050 ) IF ST5 - STATTYPE = 8/MPDPBenefit, GO TO ST47A - TOTALCHG ( STQ2055 ).

ELSE IF ST5 - STATTYPE = 2/Insurance, 4/Tricare OR 6/TricareAndInsurance, GO TO ST48 - TOTALCHG ( STQ2060 ).

ELSE IF ST5 - MCARTYPE = 4/MSNPartB, GO TO ST52 - TOTALCHG ( STQ2080 ).

ELSE IF ST5 - MCARTYPE = 6/MSNPartAlnpatient, GO TO ST56 - DAYSUSED ( STQ2100 ).

ELSE GO TO ST60 - TOTALCHG ( STQ2120 ).

## **ASSIGNMENTS**

---

## **TECHNICAL NOTES**

---

## **DESIGN NOTES**

---

**ST47A**

Page Order # : 845

Design Screen Type: Dollar

Fields: Field 1: TOTALCHG

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

**Question display:** Display "TOTAL COST OF PRESCRIPTION(S)" in BOLD.  
Always display "(S)" in parenthesis.

Display "COST" in "IF A TOTAL COST" in BOLD.

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: (ST CLAIM HEADER)

**Int. Instr I:** ENTER THE TOTAL COST OF PRESCRIPTION(S) FROM THE MEDICARE PRESCRIPTION DRUG BENEFIT STATEMENT. IF A TOTAL COST IS NOT LISTED, IT MAY BE NECESSARY TO CALCULATE A TOTAL BY ADDING THE COSTS OF INDIVIDUAL ITEMS LISTED ON THE STATEMENT.

Question Text:

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:** TOTALCHG ( STQ2055 )**Cheshire Name:** CORO.TOTALCHG**Item Text display:** Always display "(S)" in parenthesis.**Item Text:****Label:** TOTAL CHARGE OF PRESCRIPTION(S):**Label Position:** Left**Field Type:** Real**Type Name:** TAmT**Answers Allowed:** 1**Drop Down List:** No**Lookup File:** No**Lookup File Name:****FieldSize:****Min Value:** 0**Max Value:** 999999.99**Mask:** Dollars

Number	Label	Route
1	[Continuous answer.]	ST64 - STTCHGPAID2 ( STQ2695 )

Attribute	Route
Don't know	ST64 - STTCHGPAID2 ( STQ2695 )
Refusal	ST64 - STTCHGPAID2 ( STQ2695 )

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**STDATQNO** COST.STDATQNO = 8/ST47A.**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

**ST48**

Page Order # : 850

Design Screen Type: Numeric

Fields:

<b>Field 1:</b>	<b>TOTALCHG</b>
<b>Field 2:</b>	<b>MCAPPAMT</b>
<b>Field 3:</b>	<b>MCPAYAMT</b>

Enable Functions:

<b>HELP</b>	No
<b>COMMENTS</b>	Yes
<b>JUMPBACK</b>	Yes

Roster Name:

Roster Type:

Roster Functions:

<b>Add Item</b>	No
<b>Edit Item</b>	No
<b>Delete Item</b>	No
<b>Search Item</b>	No

Grid Functions:

<b>Add Line</b>	No
<b>Delete Line</b>	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display: Always display "[SEE SHOWCARD...]" in brackets.

Multi Field display: Vertical Alignment  
Display all fields at one time.

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: (ST CLAIM HEADER)  
EVENT: (CHARGE BUNDLE EVENT)  
(CHARGE BUNDLE EVENT) (etc.)

Int. Instr I: ENTER THE FOLLOWING AMOUNTS FROM THE (TYPE OF STATEMENT). IF AMOUNT NOT AVAILABLE, ENTER "DON'T KNOW".

[SEE SHOWCARD ST2 FOR TRICARE STATEMENT EXAMPLES.]

Question Text:

Int. Instr II:

INPUT FIELDS / ROUTING

---

**Field1:** TOTALCHG ( STQ2060 )

**Cheshire Name:** CORO.TOTALCHG

**Item Text display:**

**Item Text:**

**Label:** TOTAL CHARGE/BILLED AMOUNT:

**Label Position:** Left

**Field Type:** Real

**Type Name:** TAmt

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:** 0

**Max Value:** 999999.99

**Mask:** Dollars

Number	Label	Route
1	[Continuous answer.]	ST48 - MCAPPAMT ( STQ2061 )

---

Attribute	Route
Don't know	ST48 - MCAPPAMT ( STQ2061 )

---

Refusal	ST48 - MCAPPAMT ( STQ2061 )
---------	-----------------------------

---

**Field2:** MCAPPAMT ( STQ2061 )

**Cheshire Name:** COST.MCAPPAMT

**Item Text display:**

**Item Text:**

**Label:** TOTAL MEDICARE APPROVED AMOUNT:  
**Label Position:** Left

<b>Field Type:</b>	Real	<b>FieldSize:</b>	
<b>Type Name:</b>	TAMt	<b>Min Value:</b>	0
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	999999.99
<b>Drop Down List:</b>	No	<b>Mask:</b>	Dollars
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

Number	Label	Route
1	[Continuous answer.]	ST48 - MCPAYAMT ( STQ2062 )

Attribute	Route
Don't know	ST48 - MCPAYAMT ( STQ2062 )

Refusal	ST48 - MCPAYAMT ( STQ2062 )
---------	-----------------------------



**Field3:** MCPAYAMT ( STQ2062 )

**Cheshire Name:** COST.MCPAYAMT

**Item Text display:**

**Item Text:**

**Label:** TOTAL MEDICARE PAYMENT:

**Label Position:** Left

**Field Type:** Real

**FieldSize:**

**Type Name:** TAmT

**Min Value:** 0

**Answers Allowed:** 1

**Max Value:** 999999.99

**Drop Down List:** No

**Mask:** Dollars

**Lookup File:** No

**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	BOX ST48 - (STQ2065 )

Attribute	Route
Don't know	BOX ST48 - (STQ2065 )

Refusal	BOX ST48 - (STQ2065 )
---------	-----------------------

**BACKGROUND VARIABLE ASSIGNMENTS**

CALCULATE COST.AREMAING:

If ST47 - ASGNTAKE = 1/Yes and ((ST48 - MCAPPAMT ^= DK, RF) and (ST48 - MCPAYAMT ^= DK, RF)), set COST.AREMAING = (MCAPPAMT - MCPAYAMT);

Else if (ST47 - ASGNTAKE = 2/No or 3/CantTell) and ((ST48 - TOTALCHG ^= DK, RF) and (ST48 - MCPAYAMT ^= DK, RF)), set COST.AREMAING = (TOTALCHG - MCPAYAMT);

Else if ST47 - ASGNTAKE = 3/CantTell and ((ST48 - MCAPPAMT ^= DK, RF) and (ST48 - MCPAYAMT ^= DK, RF)), set COST.AREMAING = (MCAPPAMT - MCPAYAMT);

Else set COST.AREMAING = empty.

If Calculated Amount Remaining is < 0, reset COST.AREMAING = 0.

**STDATQNO** COST.STDATQNO = 1/ST48.

**TOTALAMT** COST.TOTALAMT = ST48 - TOTALCHG.

**AREMAING** Set COST.AREMAING based on calculation instructions above.

**ARCALFLG** Set COST.ARCALFLG = 1/Yes.

**SOFT EDIT CHECKS**

Edit #1

TOTALCHG = 4.99 - 20,000.00.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #2

MCAPPAMT = 3.99 - 16,000.00.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #3

MCPAYAMT = 3.99 - 16,000.00.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #4

If (MCAPPAMT ^= DK and MCAPPAMT ^= RF) and (TOTALCHG ^= DK and TOTALCHG ^= RF), then MCAPPAMT <= TOTALCHG.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #5

If (MCPAYAMT ^= DK and MCPAYAMT ^= RF) and (TOTALCHG ^= DK and TOTALCHG ^= RF), then MCPAYAMT <= TOTALCHG.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #6

If (MCPAYAMT ^= DK and MCPAYAMT ^= RF) and (MCAPPAMT ^= DK and MCAPPAMT ^= RF), then MCPAYAMT <= MCAPPAMT.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

**BOX ST48**

**Page Order # :** 860

**BOX INSTRUCTIONS**

( STQ2065 ) IF AMOUNT REMAINING = DK OR EMPTY, GO TO BOX ST51 - (STQ2072 ).  
ELSE IF (AMOUNT REMAINING < \$1.00) OR ((ST48 - MCAPPAMT ^= DK  
OR RF) AND (AMOUNT REMAINING < .02 \* ST48 - MCAPPAMT)), GO TO  
BOX ST80 - (STQ2930 ).  
ELSE GO TO ST49 - STTCHGPAID1 ( STQ2066 ).

**ASSIGNMENTS**

**TECHNICAL NOTES**

<b>230</b>	<b>AmountRemaining</b>	Amount Remaining = COST.AREMAING.
------------	------------------------	--------------------------------------

**DESIGN NOTES**

**ST49**

Page Order # : 870

Design Screen Type: Code 1

Fields: Field 1: STTCHGPAID1

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:****Question display:** Always display "(S)" in interviewer instructions in parenthesis.

If SP was covered by TRICARE and any other insurance plan besides Medicare during the current round, display "such as TRICARE or an insurance plan".

Else if SP was covered by TRICARE and is not covered by any other insurance plan besides Medicare during the current round, display "such as TRICARE"

Else if SP was not covered by TRICARE and was covered by any other insurance plan besides Medicare during the current round, display "such as an insurance plan".

Else do not display.

**Multi Field display:****Roster/Grid Instructions:****Roster/Grid display:****Report display:****TEXT:**

---

**Context Header:** (ST CLAIM HEADER)  
 EVENT: (CHARGE BUNDLE EVENT)  
 (CHARGE BUNDLE EVENT) (etc.)

**Int. Instr I:** REVIEW CHARGE BUNDLE ON (TYPE OF STATEMENT) WITH RESPONDENT IF YOU HAVEN'T ALREADY DONE SO. POINT OUT PROVIDER NAME, DATE(S), AND TYPE OF SERVICE. THEN ASK:

**Question Text:** So, I have an amount remaining of \$(AMOUNT REMAINING) that Medicare didn't pay. [Have you/Has (SP)] or any other source, [such as (TRICARE/an insurance plan/TRICARE or an insurance plan)], paid any of this amount?

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

---

**Field1:** STTCHGPAID1 ( STQ2066 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

<b>Field Type:</b>	Enumerated	<b>FieldSize:</b>
<b>Type Name:</b>	TTchgPaid1	<b>Min Value:</b>
<b>Answers Allowed:</b>	1	<b>Max Value:</b>
<b>Drop Down List:</b>	No	<b>Mask:</b>
<b>Lookup File:</b>	No	
<b>Lookup File Name:</b>		

Number	Label	Route
1	SomeonePaid	BOX ST64A - (STQ2700 )
	<b>English text:</b> SP OR ANY SOURCE PAID	
2	NothingPaid	BOX ST64A - (STQ2700 )
	<b>English text:</b> NOTHING HAS BEEN PAID	
3	AmountRemainingWrong	ST50 - CHANGAMT ( STQ2067 )
	<b>English text:</b> AMOUNT REMAINING SEEMS WRONG	

Attribute	Route
Don't know	BOX ST64A - (STQ2700 )
Refusal	BOX ST64A - (STQ2700 )

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**ARWRONG** If ST49 - STTCHGPAID1 = 3/AmountRemaingWrong, set COST.ARWRONG = 1/Yes.

**TCHGPAID**                    If ST49 - STTCHGPAID1 = 1/SomeonePaid, set  
 CORO.TCHGPAID = 1/Yes.  
 Else if ST49 - STTCHGPAID1 = 2/NothingPaid, set  
 CORO.TCHGPAID = 2/No.  
 Else if ST49 - STTCHGPAID1 = DK, set  
 CORO.TCHGPAID = DK.  
 Else if ST49 - STTCHGPAID1 = RF, set  
 CORO.TCHGPAID = RF.

---

**SOFT EDIT CHECKS**


---

**HARD EDIT CHECKS**


---

**TECHNICAL NOTES**


---

- |            |                      |                                                                                                                                                                                                                                                                                 |
|------------|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>52</b>  | <b>DeletedPlans</b>  | Deleted plans that are not valid for displays or checks =<br>Any PLAN where (PLAN.PLANDFLG=1/Yes or<br>PLAN.MHMODFLG=1/Yes or PLAN.PLANHIDE=1/Yes or<br>PLAN.LOSEPLFG ^=EMPTY) is a deleted PLAN.                                                                               |
| <b>258</b> | <b>TricarePlan</b>   | SP covered by TRICARE during the current round =<br>There is a PLAN where PLAN.PLANTYPE = 6/Tricare<br>& PLRO where (PLRO.PLROPLAN = PLAN.PLANNUM &<br>PLRO.PLRORND = current round & PLRO.COVTIME^=<br>empty).<br>Exclude Deleted Plans. See T.N. 52.                          |
| <b>259</b> | <b>InsurancePlan</b> | SP covered by Insurance plan other than Medicare<br>during current round =<br>PLAN where (PLANTYPE = 2/Medicaid, 3/PublicPlan, or<br>4/PrivatePlan) & PLRO where<br>(PLROPLAN=PLAN.PLANNUM & PLRORND=current<br>round & COVTIME^=empty).<br>Exclude Deleted Plans. See T.N. 52. |

**DESIGN NOTES**


---

**ST50**

Page Order # : 880

Design Screen Type: Yes/No

Fields: Field 1: CHANGAMT

Enable Functions:	HELP	Yes
	COMMENTS	Yes
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: (ST CLAIM HEADER)  
 EVENT: (CHARGE BUNDLE EVENT)  
 (CHARGE BUNDLE EVENT) (etc.)

Int. Instr I: THESE AMOUNTS WERE ENTERED FROM THE (TYPE OF  
 STATEMENT) STATEMENT:

Question Text: TOTAL CHARGE/BILLED AMOUNT: (TOTAL CHARGE AMOUNT)

TOTAL MEDICARE APPROVED AMOUNT: (MEDICARE  
 APPROVED AMOUNT)

TOTAL MEDICARE PAYMENT: (MEDICARE PAYMENT)

AMOUNT REMAINING AFTER MEDICARE PAYMENT: (AMOUNT)

REMAINING)

Int. Instr II: DO YOU WANT TO MAKE ANY CHANGES?

**INPUT FIELDS / ROUTING**

---

**Field1:** CHANGAMT ( STQ2067 )

**Cheshire Name:** COST.CHANGAMT

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TYesNo

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	Yes	ST51 - TOTALCHG ( STQ2068 )
	English text: YES	
2	No	BOX ST51 - (STQ2072 )
	English text: NO	

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

230 AmountRemaining Amount Remaining = COST.AREMAING.

**DESIGN NOTES**

---



**ST51**

Page Order # : 890

Design Screen Type: Numeric

Fields:

<b>Field 1:</b>	<b>TOTALCHG</b>
<b>Field 2:</b>	<b>MCAPPAMT</b>
<b>Field 3:</b>	<b>MCPAYAMT</b>

<b>Enable Functions:</b>	<b>HELP</b>	No
	<b>COMMENTS</b>	No
	<b>JUMPBACK</b>	No

Roster Name:

Roster Type:

<b>Roster Functions:</b>	<b>Add Item</b>	No
	<b>Edit Item</b>	No
	<b>Delete Item</b>	No
	<b>Search Item</b>	No

<b>Grid Functions:</b>	<b>Add Line</b>	No
	<b>Delete Line</b>	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

**Multi Field display:** Vertical Alignment  
Display all fields at one time.

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

**Context Header:** (ST CLAIM HEADER)  
EVENT: (CHARGE BUNDLE EVENT)  
(CHARGE BUNDLE EVENT) (etc.)

**Int. Instr I:** MAKE ALL THE NECESSARY CORRECTIONS TO THE AMOUNTS  
THAT WERE ENTERED FROM THE (TYPE OF STATEMENT).

**Question Text:****Int. Instr II:**

**INPUT FIELDS / ROUTING**

---

**Field1:** TOTALCHG ( STQ2068 )

**Cheshire Name:** CORO.TOTALCHG

**Item Text display:** Display previously collected response. Allow field to be updated.

**Item Text:**

**Label:** TOTAL CHARGE/BILLED AMOUNT:

**Label Position:** Left

**Field Type:** Real

**Type Name:** TAmt

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:** 0

**Max Value:** 999999.99

**Mask:** Dollars

Number	Label	Route
1	[Continuous answer.]	ST51 - MCAPPAMT ( STQ2069 )

---

Attribute	Route
Don't know	ST51 - MCAPPAMT ( STQ2069 )
Refusal	ST51 - MCAPPAMT ( STQ2069 )

---

**Field2:** MCAPPAMT ( STQ2069 )

**Cheshire Name:** COST.MCAPPAMT

**Item Text display:** Display previously collected response. Allow field to be updated.

**Item Text:**

**Label:** TOTAL MEDICARE APPROVED AMOUNT:  
**Label Position:** Left

<b>Field Type:</b>	Real	<b>FieldSize:</b>	
<b>Type Name:</b>	TAmt	<b>Min Value:</b>	0
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	999999.99
<b>Drop Down List:</b>	No	<b>Mask:</b>	Dollars
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

Number	Label	Route
1	[Continuous answer.]	ST51 - MCPAYAMT ( STQ2070 )

Attribute	Route
Don't know	ST51 - MCPAYAMT ( STQ2070 )

Refusal	ST51 - MCPAYAMT ( STQ2070 )
---------	-----------------------------

**Field3:** MCPAYAMT ( STQ2070 )

**Cheshire Name:** COST.MCPAYAMT

**Item Text display:** Display previously collected response. Allow field to be updated.

**Item Text:**

**Label:** TOTAL MEDICARE PAYMENT:  
**Label Position:** Left

**Field Type:** Real  
**Type Name:** TAmT  
**Answers Allowed:** 1  
**Drop Down List:** No  
**Lookup File:** No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:** 0  
**Max Value:** 999999.99  
**Mask:** Dollars

Number	Label	Route
1	[Continuous answer.]	BOX ST51 - (STQ2072 )

Attribute	Route
Don't know	BOX ST51 - (STQ2072 )

Refusal	BOX ST51 - (STQ2072 )
---------	-----------------------

**BACKGROUND VARIABLE ASSIGNMENTS**

CALCULATE COST.AREMAING:

if ST47 - ASGNTAKE = 1/Yes and ((ST51 - MCAPPAMT ^= DK, RF) and (ST51 - MCPAYAMT ^= DK, RF)), set COST.AREMAING = (MCAPPAMT - MCPAYAMT);

Else if (ST47 - ASGNTAKE = 2/No or 3/CantTell) and ((ST51 - TOTALCHG ^= DK, RF) and (ST51 - MCPAYAMT ^= DK, RF)), set COST.AREMAING = (TOTALCHG - MCPAYAMT);

Else if ST47 - ASGNTAKE = 3/CantTell and ((ST51 - MCAPPAMT ^= DK, RF) and (ST51 - MCPAYAMT ^= DK, RF)), set COST.AREMAING = (MCAPPAMT - MCPAYAMT);

Else set COST.AREMAING = empty.

If Calculated Amount Remaining is < 0, reset COST.AREMAING = 0.

**TOTALAMT** COST.TOTALAMT = ST51 - TOTALCHG.  
**AREMAING** Set COST.AREMAING based on calculation instructions above.

**SOFT EDIT CHECKS**

Edit #1  
TOTALCHG = 4.99 - 20,000.00.  
If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #2

MCAPPAMT = 3.99 - 16,000.00.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #3

MCPAYAMT= 3.99 - 16,000.00.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #4

If (MCAPPAMT ^= DK and MCAPPAMT ^= RF) and (TOTALCHG ^= DK and TOTALCHG ^= RF), then MCAPPAMT <= TOTALCHG.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #5

If (MCPAYAMT ^= DK and MCPAYAMT ^= RF) and (TOTALCHG ^= DK and TOTALCHG ^= RF), then MCPAYAMT <= TOTALCHG.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #6

If (MCPAYAMT ^= DK and MCPAYAMT ^= RF) and (MCAPPAMT ^= DK and MCAPPAMT ^= RF), then MCPAYAMT <= MCAPPAMT.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

# BOX ST51

Page Order # : 900

## BOX INSTRUCTIONS

---

( STQ2072 ) IF (AMOUNT REMAINING ^= DK AND AMOUNT REMAINING ^= EMPTY)  
AND ((AMOUNT REMAINING < \$1.00) OR ((ST51 - MCAPPAMT ^= DK AND  
ST51 - MCAPPAMT ^= RF) AND (AMOUNT REMAINING < .02 \* ST51 -  
MCAPPAMT))), GO TO BOX ST80 - (STQ2930 ).  
  
ELSE GO TO ST64 - STTCHGPAID2 ( STQ2695 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

230	AmountRemaining	Amount Remaining = COST.AREMAING.
-----	-----------------	--------------------------------------

## DESIGN NOTES

---

**ST52**

Page Order # : 910

Design Screen Type: Numeric

Fields:	Field 1:	TOTALCHG
	Field 2:	MCAPPAMT
	Field 3:	MCPAYAMT
	Field 4:	MAYBBILL

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display: Vertical Alignment  
Display all fields at one time.

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: (ST CLAIM HEADER)  
EVENT: (CHARGE BUNDLE EVENT)  
(CHARGE BUNDLE EVENT) (etc.)

Int. Instr I: ENTER THE FOLLOWING AMOUNTS FROM THE MSN:

Question Text:

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:** TOTALCHG ( STQ2080 )

**Cheshire Name:** CORO.TOTALCHG

**Item Text display:**

**Item Text:**

**Label:** AMOUNT CHARGED:

**Label Position:** Left

**Field Type:** Real

**Type Name:** TAmt

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:** 0

**Max Value:** 999999.99

**Mask:** Dollars

Number	Label	Route
1	[Continuous answer.]	ST52 - MCAPPAMT ( STQ2081 )

---

Attribute	Route
Don't know	ST52 - MCAPPAMT ( STQ2081 )

---

Refusal	ST52 - MCAPPAMT ( STQ2081 )
---------	-----------------------------

---



**Field2:** MCAPPAMT ( STQ2081 )

**Cheshire Name:** COST.MCAPPAMT

**Item Text display:**

**Item Text:**

**Label:** MEDICARE APPROVED:

**Label Position:** Left

**Field Type:** Real

**Type Name:** TAmT

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**  
**Min Value:** 0  
**Max Value:** 999999.99  
**Mask:** Dollars

Number	Label	Route
1	[Continuous answer.]	ST52 - MCPAYAMT ( STQ2082 )

Attribute	Route
Don't know	ST52 - MCPAYAMT ( STQ2082 )

Refusal	ST52 - MCPAYAMT ( STQ2082 )
---------	-----------------------------

**Field3:** MCPAYAMT ( STQ2082 )

**Cheshire Name:** COST.MCPAYAMT

**Item Text display:** Always display (PROVIDER/YOU) in label in parenthesis.

**Item Text:**

**Label:** MEDICARE PAID (PROVIDER/YOU):

**Label Position:** Left

**Field Type:** Real

**Type Name:** TAmT

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**  
**Min Value:** 0  
**Max Value:** 999999.99  
**Mask:** Dollars

Number	Label	Route
1	[Continuous answer.]	ST52 - MAYBBILL ( STQ2083 )

Attribute	Route
Don't know	ST52 - MAYBBILL ( STQ2083 )

Refusal	ST52 - MAYBBILL ( STQ2083 )
---------	-----------------------------

**Field4:**                    **MAYBBILL**                    ( STQ2083 )

**Cheshire Name:**            COST.MAYBBILL

**Item Text display:**

**Item Text:**

**Label:**                    YOU MAY BE BILLED:

**Label Position:**            Left

**Field Type:**                Real

**Type Name:**                TAmtnor

**Answers Allowed:**            1

**Drop Down List:**            No

**Lookup File:**                No

**Lookup File Name:**

**FieldSize:**

**Min Value:**                0

**Max Value:**                999999.99

**Mask:**                      Dollars

Number	Label	Route
1	[Continuous answer.]	BOX ST52 - (STQ2085 )

Attribute	Route
Don't know	BOX ST52 - (STQ2085 )

#### BACKGROUND VARIABLE ASSIGNMENTS

CALCULATE COST.AREMAING:

If ST47 - ASGNTAKE = 1/Yes, set COST.AREMAING = ST52 -MAYBBILL.  
 Else if ST47 - ASGNTAKE = 2/No and (ST52 - TOTALCHG = DK or RF) or (ST52 - MCPAYAMT = DK or RF), set COST.AREMAING = DK;  
 Else set COST.AREMAING = (TOTALCHG - MCPAYAMT). If calculated Amount Remaining is < 0, then reset COST.AREMAING = 0.

**STDATQNO**                    COST.STDATQNO = 5/ST52.

**TOTALAMT**                    COST.TOTALAMT = ST52 - TOTALCHG.

**AREMAING**                    Set COST.AREMAING based on calculation instructions above.

#### SOFT EDIT CHECKS

Edit #1

TOTALCHG = 4.99 - 20,000.00.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #2

MCAPPAMT = 3.99 - 16,000.00.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #3

MCPAYAMT = 3.99 - 16,000.00.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #4

MAYBBILL = 0 - 20,000.00.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #5

If (TOTALCHG ^= DK and TOTALCHG ^= RF) and (MCAPPAMT ^= DK and MCAPPAMT ^= RF), then MCAPPAMT <= TOTALCHG.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #6

If (TOTALCHG ^= DK and TOTALCHG ^= RF) and (MCPAYAMT ^= DK and MCPAYAMT ^= RF), then MCPAYAMT <= TOTALCHG.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #7

If (TOTALCHG ^= DK and TOTALCHG ^= RF)

and (MAYBBILL ^= DK), then MAYBBILL should be <= TOTALCHG.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #8

If (MCAPPAMT ^= DK and MCAPPAMT ^= RF) and (MCPAYAMT ^= DK and MCPAYAMT ^= RF), then MCPAYAMT <= MCAPPAMT.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #9

If COST.ASGNTAKE = 2/No, and (MAYBBILL ^= DK) and (MCPAYAMT ^= DK and MCPAYAMT ^= RF),

then MCPAYAMT <= MAYBBILL.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #10

If COST.ASGNTAKE=1/Yes and (MAYBBILL ^= DK) and (MCAPPAMT ^= DK and MCAPPAMT ^= RF),

then MAYBBILL <= MCAPPAMT.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

**BOX ST52**

**BOX INSTRUCTIONS**

---

( STQ2085 ) IF AMOUNT REMAINING = DK OR EMPTY, GO TO BOX ST55 - (STQ2095 ).  
ELSE IF AMOUNT REMAINING < \$1.00, GO TO BOX ST80 - (STQ2930 ).  
ELSE GO TO ST53 - STTCHGPAID1 ( STQ2086 ).

**ASSIGNMENTS**

---

**TECHNICAL NOTES**

---

230	AmountRemaining	Amount Remaining = COST.AREMAING.
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**DESIGN NOTES**

---

**ST53**

Page Order # : 930

Design Screen Type: Code 1

Fields: Field 1: STTCHGPAID1

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:****Question display:** Always display "(S)" in interviewer instructions in parenthesis.

If SP was covered by TRICARE and any other insurance plan besides Medicare during the current round, display "such as TRICARE or an insurance plan".

Else if SP was covered by TRICARE and is not covered by any other insurance plan besides Medicare during the current round, display "such as TRICARE"

Else if SP was not covered by TRICARE and was covered by any other insurance plan besides Medicare during the current round, display "such as an insurance plan".

Else do not display.

**Multi Field display:****Roster/Grid Instructions:****Roster/Grid display:****Report display:****TEXT:** -----

**Context Header:** (ST CLAIM HEADER)  
 EVENT: (CHARGE BUNDLE EVENT)  
 (CHARGE BUNDLE EVENT) (etc.)

**Int. Instr I:** REVIEW CHARGE BUNDLE ON THE (TYPE OF STATEMENT) WITH RESPONDENT IF YOU HAVEN'T ALREADY DONE SO. POINT OUT PROVIDER NAME, DATE(S), AND TYPE OF SERVICE. THEN ASK:

**Question Text:** So, I have an amount remaining of \$(AMOUNT REMAINING) that Medicare didn't pay. [Have you/Has (SP)] or any other source, [such as (TRICARE/an insurance plan/TRICARE or an insurance plan)], paid any of this amount?

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

---

**Field1:** STTCHGPAID1 ( STQ2086 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

<b>Field Type:</b>	Enumerated	<b>FieldSize:</b>
<b>Type Name:</b>	TTchgPaid1	<b>Min Value:</b>
<b>Answers Allowed:</b>	1	<b>Max Value:</b>
<b>Drop Down List:</b>	No	<b>Mask:</b>
<b>Lookup File:</b>	No	
<b>Lookup File Name:</b>		

Number	Label	Route
1	SomeonePaid	BOX ST64A - (STQ2700 )
	<b>English text:</b> SP OR ANY SOURCE PAID	
2	NothingPaid	BOX ST64A - (STQ2700 )
	<b>English text:</b> NOTHING HAS BEEN PAID	
3	AmountRemainingWrong	ST54 - CHANGAMT ( STQ2087 )
	<b>English text:</b> AMOUNT REMAINING SEEMS WRONG	

Attribute	Route
Don't know	BOX ST64A - (STQ2700 )
Refusal	BOX ST64A - (STQ2700 )

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**ARWRONG** If ST53 - STTCHGPAID1 = 3/AmountRemaingWrong, set COST.ARWRONG = 1/Yes.

**TCHGPAID**                    If ST53 - STTCHGPAID1 = 1/SomeonePaid, set  
CORO.TCHGPAID = 1/Yes.  
Else if ST53 - STTCHGPAID1 = 2/NothingPaid, set  
CORO.TCHGPAID = 2/No.  
Else if ST53 - STTCHGPAID1 = DK, set  
CORO.TCHGPAID = DK.  
Else if ST53 - STTCHGPAID1 = RF, set  
CORO.TCHGPAID = RF.

---

**SOFT EDIT CHECKS**


---

**HARD EDIT CHECKS**


---

**TECHNICAL NOTES**


---

- |            |                      |                                                                                                                                                                                                                                                                                 |
|------------|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>52</b>  | <b>DeletedPlans</b>  | Deleted plans that are not valid for displays or checks =<br>Any PLAN where (PLAN.PLANDFLG=1/Yes or<br>PLAN.MHMODFLG=1/Yes or PLAN.PLANHIDE=1/Yes or<br>PLAN.LOSEPLFG ^=EMPTY) is a deleted PLAN.                                                                               |
| <b>258</b> | <b>TricarePlan</b>   | SP covered by TRICARE during the current round =<br>There is a PLAN where PLAN.PLANTYPE = 6/Tricare<br>& PLRO where (PLRO.PLROPLAN = PLAN.PLANNUM &<br>PLRO.PLRORND = current round & PLRO.COVTIME^=<br>empty).<br>Exclude Deleted Plans. See T.N. 52.                          |
| <b>259</b> | <b>InsurancePlan</b> | SP covered by Insurance plan other than Medicare<br>during current round =<br>PLAN where (PLANTYPE = 2/Medicaid, 3/PublicPlan, or<br>4/PrivatePlan) & PLRO where<br>(PLROPLAN=PLAN.PLANNUM & PLRORND=current<br>round & COVTIME^=empty).<br>Exclude Deleted Plans. See T.N. 52. |

---

**DESIGN NOTES**


---



**ST54**

Page Order # : 940

Design Screen Type: Yes/No

Fields: Field 1: CHANGAMT

Enable Functions:	HELP	Yes
	COMMENTS	Yes
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: (ST CLAIM HEADER)  
 EVENT: (CHARGE BUNDLE EVENT)  
 (CHARGE BUNDLE EVENT) (etc.)

Int. Instr I: THESE AMOUNTS WERE ENTERED FROM THE (TYPE OF  
 STATEMENT) :

Question Text: AMOUNT CHARGED: (TOTAL CHARGE AMOUNT)  
 MEDICARE APPROVED: (MEDICARE APPROVED AMOUNT)  
 MEDICARE PAID: (MEDICARE PAYMENT)  
 YOU MAY BE BILLED: (MAY BE BILLED)

Int. Instr II: DO YOU WANT TO MAKE ANY CHANGES?

**INPUT FIELDS / ROUTING**

---

**Field1:** CHANGAMT ( STQ2087 )

**Cheshire Name:** COST.CHANGAMT

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TYesNo

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	Yes	ST55 - TOTALCHG ( STQ2088 )
	English text: YES	
2	No	BOX ST55 - (STQ2095 )
	English text: NO	

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

230 AmountRemaining Amount Remaining = COST.AREMAING.

**DESIGN NOTES**

---

**ST55**

Page Order # : 950

Design Screen Type: Numeric

Fields:

<b>Field 1:</b>	<b>TOTALCHG</b>
<b>Field 2:</b>	<b>MCAPPAMT</b>
<b>Field 3:</b>	<b>MCPAYAMT</b>
<b>Field 4:</b>	<b>MAYBBILL</b>

<b>Enable Functions:</b>	<b>HELP</b>	Yes
	<b>COMMENTS</b>	Yes
	<b>JUMPBACK</b>	No

Roster Name:

Roster Type:

<b>Roster Functions:</b>	<b>Add Item</b>	No
	<b>Edit Item</b>	No
	<b>Delete Item</b>	No
	<b>Search Item</b>	No

<b>Grid Functions:</b>	<b>Add Line</b>	No
	<b>Delete Line</b>	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

**Multi Field display:** Vertical Alignment  
Display all fields at one time.

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

**Context Header:** (ST CLAIM HEADER)  
EVENT: (CHARGE BUNDLE EVENT)  
(CHARGE BUNDLE EVENT) (etc.)

**Int. Instr I:** MAKE ALL THE NECESSARY CORRECTIONS TO THE AMOUNTS  
THAT WERE ENTERED FROM THE (TYPE OF STATEMENT).

Question Text:

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:** TOTALCHG ( STQ2088 )

**Cheshire Name:** CORO.TOTALCHG

**Item Text display:** Display previously collected response. Allow field to be updated.

**Item Text:**

**Label:** AMOUNT CHARGED:

**Label Position:** Left

**Field Type:** Real

**Type Name:** TAmT

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:** 0

**Max Value:** 999999.99

**Mask:** Dollars

Number	Label	Route
1	[Continuous answer.]	ST55 - MCAPPAMT ( STQ2089 )

Attribute	Route
Don't know	ST55 - MCAPPAMT ( STQ2089 )

Refusal	ST55 - MCAPPAMT ( STQ2089 )
---------	-----------------------------

**Field2:** MCAPPAMT ( STQ2089 )

**Cheshire Name:** COST.MCAPPAMT

**Item Text display:** Display previously collected response. Allow field to be updated.

**Item Text:**

**Label:** MEDICARE APPROVED:  
**Label Position:** Left

<b>Field Type:</b>	Real	<b>FieldSize:</b>	
<b>Type Name:</b>	TAmt	<b>Min Value:</b>	0
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	999999.99
<b>Drop Down List:</b>	No	<b>Mask:</b>	Dollars
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

Number	Label	Route
1	[Continuous answer.]	ST55 - MCPAYAMT ( STQ2090 )

Attribute	Route
Don't know	ST55 - MCPAYAMT ( STQ2090 )

Refusal	ST55 - MCPAYAMT ( STQ2090 )
---------	-----------------------------

**Field3:** MCPAYAMT ( STQ2090 )

**Cheshire Name:** COST.MCPAYAMT

**Item Text display:** Display previously collected response. Allow field to be updated.

Always display (PROVIDER/YOU) in label in parenthesis.

**Item Text:**

**Label:** MEDICARE PAID (PROVIDER/YOU):

**Label Position:** Left

**Field Type:** Real

**FieldSize:**

**Type Name:** TAmT

**Min Value:** 0

**Answers Allowed:** 1

**Max Value:** 999999.99

**Drop Down List:** No

**Mask:** Dollars

**Lookup File:** No

**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	ST55 - MAYBBILL ( STQ2091 )

Attribute	Route
Don't know	ST55 - MAYBBILL ( STQ2091 )

Refusal	ST55 - MAYBBILL ( STQ2091 )
---------	-----------------------------

**Field4:** MAYBBILL ( STQ2091 )

**Cheshire Name:** COST.MAYBBILL

**Item Text display:** Display previously collected response. Allow field to be updated.

**Item Text:**

**Label:** YOU MAY BE BILLED:

**Label Position:** Left

**Field Type:** Real

**Type Name:** TAmtnor

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:** 0

**Max Value:** 999999.99

**Mask:** Dollars

Number	Label	Route
1	[Continuous answer.]	BOX ST55 - (STQ2095 )
Attribute	Route	
Don't know	BOX ST55 - (STQ2095 )	

#### BACKGROUND VARIABLE ASSIGNMENTS

CALCULATE COST.AREMAING:

If ST47 - ASGNTAKE = 1/Yes, set COST.AREMAING = ST55 -MAYBBILL.  
 Else if ST47 - ASGNTAKE = 2/No and (ST55 - TOTALCHG = DK or RF) or (ST55 - MCPAYAMT = DK or RF), set COST.AREMAING = DK;  
 Else set COST.AREMAING = (TOTALCHG - MCPAYAMT). If calculated Amount Remaining is < 0, reset COST.AREMAING = 0.

**TOTALAMT** COST.TOTALAMT = ST55 - TOTALCHG.

**AREMAING** Set COST.AREMAING based on calculation instructions above.

#### SOFT EDIT CHECKS

Edit #1

TOTALCHG = 4.99 - 20,000.00.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #2

MCAPPAMT = 3.99 - 16,000.00.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

Edit #3

MCPAYAMT = 3.99 - 16,000.00.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

## Edit #4

MAYBBILL = 0 - 20,000.00.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

## Edit #5

If (TOTALCHG ^= DK and TOTALCHG ^= RF) and (MCAPPAMT ^= DK and MCAPPAMT ^= RF), then MCAPPAMT <= TOTALCHG.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

## Edit #6

If (TOTALCHG ^= DK and TOTALCHG ^= RF) and (MCPAYAMT ^= DK and MCPAYAMT ^= RF), then MCPAYAMT <= TOTALCHG.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

## Edit #7

If (TOTALCHG ^= DK and TOTALCHG ^= RF) and (MAYBBILL ^= DK), then MAYBBILL should be <= TOTALCHG.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

## Edit #8

If (MCAPPAMT ^= DK and MCAPPAMT ^= RF) and (MCPAYAMT ^= DK and MCPAYAMT ^= RF), then MCPAYAMT <= MCAPPAMT.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

## Edit #9

If COST.ASGNTAKE = 2/No, and (MAYBBILL ^= DK) and (MCPAYAMT ^= DK and MCPAYAMT ^= RF), then MCPAYAMT <= MAYBBILL.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

## Edit #10

If COST.ASGNTAKE=1/Yes and (MAYBBILL ^= DK) and (MCAPPAMT ^= DK and MCAPPAMT ^= RF), then MAYBBILL <= MCAPPAMT.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY."

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---



# BOX ST55

Page Order # : 960

**BOX INSTRUCTIONS**

---

( STQ2095 ) IF (AMOUNT REMAINING ^= DK AND AMOUNT REMAINING ^= EMPTY)  
AND (AMOUNT REMAINING < \$1.00), GO TO BOX ST80 - (STQ2930 ).  
  
ELSE GO TO ST64 - STTCHGPAID2 ( STQ2695 ).

**ASSIGNMENTS**

---

**TECHNICAL NOTES**

---

230	AmountRemaining	Amount Remaining = COST.AREMAING.
-----	-----------------	--------------------------------------

**DESIGN NOTES**

---

**ST56**

Page Order # : 970

Design Screen Type: Numeric

Fields:

<b>Field 1:</b>	<b>DAYSUSED</b>
<b>Field 2:</b>	<b>NONCOVRD</b>
<b>Field 3:</b>	<b>COINSUR</b>
<b>Field 4:</b>	<b>MAYBBILL</b>

Enable Functions:

<b>HELP</b>	No
<b>COMMENTS</b>	Yes
<b>JUMPBACK</b>	Yes

Roster Name:

Roster Type:

Roster Functions:

<b>Add Item</b>	No
<b>Edit Item</b>	No
<b>Delete Item</b>	No
<b>Search Item</b>	No

Grid Functions:

<b>Add Line</b>	No
<b>Delete Line</b>	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display: Vertical Alignment  
Display all fields at one time.

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: (ST CLAIM HEADER)  
EVENT: (CHARGE BUNDLE EVENT)  
(CHARGE BUNDLE EVENT) (etc.)

Int. Instr I: ENTER THE FOLLOWING AMOUNTS FROM THE MSN.

Question Text:

Int. Instr II: DISREGARD "AMOUNT CHARGED" IF IT APPEARS ON THE STATEMENT.

**INPUT FIELDS / ROUTING**

---

**Field1:**                    **DAYSUSED**                    ( STQ2100 )

**Cheshire Name:**            COST.DAYSUSED

**Item Text display:**

**Item Text:**

**Label:**                    BENEFIT DAYS USED:  
**Label Position:**        Left

<b>Field Type:</b>	Integer	<b>FieldSize:</b>	
<b>Type Name:</b>	TDaysuseh	<b>Min Value:</b>	0
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	120
<b>Drop Down List:</b>	No	<b>Mask:</b>	
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

<b>Number</b>	<b>Label</b>	<b>Route</b>
1	[Continuous answer.]	ST56 - NONCOVRD ( STQ2101 )

---

**Field2:** NONCOVRD ( STQ2101 )

**Cheshire Name:** COST.NONCOVRD

**Item Text display:**

**Item Text:**

**Label:** NON-COVERED CHARGES:

**Label Position:** Left

**Field Type:** Real

**Type Name:** TAmt

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**  
**Min Value:** 0  
**Max Value:** 999999.99  
**Mask:** Dollars

Number	Label	Route
1	[Continuous answer.]	ST56 - COINSUR ( STQ2102 )

Attribute	Route
Don't know	ST56 - COINSUR ( STQ2102 )

Refusal	ST56 - COINSUR ( STQ2102 )
---------	----------------------------

**Field3:** COINSUR ( STQ2102 )

**Cheshire Name:** COST.COINSUR

**Item Text display:**

**Item Text:**

**Label:** DEDUCTIBLE AND COINSURANCE:

**Label Position:** Left

**Field Type:** Real

**Type Name:** TAmt

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**  
**Min Value:** 0  
**Max Value:** 999999.99  
**Mask:** Dollars

Number	Label	Route
1	[Continuous answer.]	ST56 - MAYBBILL ( STQ2103 )

Attribute	Route
Don't know	ST56 - MAYBBILL ( STQ2103 )

Refusal	ST56 - MAYBBILL ( STQ2103 )
---------	-----------------------------

**Field4:**                    **MAYBBILL**                    ( STQ2103 )

**Cheshire Name:**            COST.MAYBBILL

**Item Text display:**

**Item Text:**

**Label:**                    YOU MAY BE BILLED:

**Label Position:**            Left

**Field Type:**                Real

**Type Name:**                TAmtnor

**Answers Allowed:**            1

**Drop Down List:**            No

**Lookup File:**                No

**Lookup File Name:**

**FieldSize:**

**Min Value:**                0

**Max Value:**                999999.99

**Mask:**                      Dollars

Number	Label	Route
1	[Continuous answer.]	BOX ST56 - (STQ2105 )

Attribute	Route
Don't know	BOX ST56 - (STQ2105 )

#### BACKGROUND VARIABLE ASSIGNMENTS

**STDATQNO**                    COST.STDATQNO = 6/ST56ST60.

**AREMAING**                    COST.AREMAING = ST56 - MAYBBILL.

#### SOFT EDIT CHECKS

Edit #1

DAYSUSED = 1 - 60.

If not true, display messge "UNLIKELY RESPONSE, PLEASE VERIFY."

Edit #2

NONCOVRD = 0 - 20,000.00.

If not true, display messge "UNLIKELY RESPONSE, PLEASE VERIFY."

Edit #3

COINSUR = 0 - 20,000.00.

If not true, display messge "UNLIKELY RESPONSE, PLEASE VERIFY."

Edit #4

MAYBBILL = 0 - 20,000.00.

If not true, display messge "UNLIKELY RESPONSE, PLEASE VERIFY."

#### HARD EDIT CHECKS

**TECHNICAL NOTES**

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**DESIGN NOTES**

---

# BOX ST56

Page Order # : 980

## BOX INSTRUCTIONS

---

( STQ2105 ) IF AMOUNT REMAINING = DK OR EMPTY, GO TO BOX ST59 - (STQ2115 ).  
ELSE IF AMOUNT REMAINING < \$1.00, GO TO BOX ST80 - (STQ2930 ).  
ELSE GO TO ST57 - STTCHGPAID1 ( STQ2106 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

230	AmountRemaining	Amount Remaining = COST.AREMAING.
-----	-----------------	--------------------------------------

## DESIGN NOTES

---



**ST57**

Page Order # : 990

Design Screen Type: Code 1

Fields: Field 1: STTCHGPAID1

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:****Question display:** Always display "(S)" in interviewer instructions in parenthesis.

If SP was covered by TRICARE and any other insurance plan besides Medicare during the current round, display "such as TRICARE or an insurance plan".

Else if SP was covered by TRICARE and is not covered by any other insurance plan besides Medicare during the current round, display "such as TRICARE"

Else if SP was not covered by TRICARE and was covered by any other insurance plan besides Medicare during the current round, display "such as an insurance plan".

Else do not display.

**Multi Field display:****Roster/Grid Instructions:****Roster/Grid display:****Report display:****TEXT:**

---

**Context Header:** (ST CLAIM HEADER)  
 EVENT: (CHARGE BUNDLE EVENT)  
 (CHARGE BUNDLE EVENT) (etc.)

**Int. Instr I:** REVIEW CHARGE BUNDLE ON (TYPE OF STATEMENT) WITH RESPONDENT IF YOU HAVEN'T ALREADY DONE SO. POINT OUT PROVIDER NAME, DATE(S), AND TYPE OF SERVICE. THEN ASK:

**Question Text:** So, I have an amount remaining \$(AMOUNT REMAINING) that Medicare didn't pay. [Have you/Has (SP)] or any other source, [such as (TRICARE/an insurance plan/TRICARE or an insurance plan)], paid any of this amount?

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

---

**Field1:** STTCHGPAID1 ( STQ2106 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

<b>Field Type:</b>	Enumerated	<b>FieldSize:</b>
<b>Type Name:</b>	TTchgPaid1	<b>Min Value:</b>
<b>Answers Allowed:</b>	1	<b>Max Value:</b>
<b>Drop Down List:</b>	No	<b>Mask:</b>
<b>Lookup File:</b>	No	
<b>Lookup File Name:</b>		

Number	Label	Route
1	SomeonePaid	BOX ST64A - (STQ2700 )
	<b>English text:</b> SP OR ANY SOURCE PAID	
2	NothingPaid	BOX ST64A - (STQ2700 )
	<b>English text:</b> NOTHING HAS BEEN PAID	
3	AmountRemainingWrong	ST58 - CHANGAMT ( STQ2107 )
	<b>English text:</b> AMOUNT REMAINING SEEMS WRONG	

Attribute	Route
Don't know	BOX ST64A - (STQ2700 )
Refusal	BOX ST64A - (STQ2700 )

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**ARWRONG** If ST57 - STTCHGPAID1 = 3/AmountRemaingWrong, set COST.ARWRONG = 1/Yes.

**TCHGPAID**                    If ST57 - STTCHGPAID1 = 1/SomeonePaid, set  
CORO.TCHGPAID = 1/Yes.  
Else if ST57 - STTCHGPAID1 = 2/NothingPaid, set  
CORO.TCHGPAID = 2/No.  
Else if ST57 - STTCHGPAID1 = DK, set  
CORO.TCHGPAID = DK.  
Else if ST57 - STTCHGPAID1 = RF, set  
CORO.TCHGPAID = RF.

---

**SOFT EDIT CHECKS**


---



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**HARD EDIT CHECKS**


---



---

**TECHNICAL NOTES**


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- |            |                      |                                                                                                                                                                                                                                                                                 |
|------------|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>52</b>  | <b>DeletedPlans</b>  | Deleted plans that are not valid for displays or checks =<br>Any PLAN where (PLAN.PLANDFLG=1/Yes or<br>PLAN.MHMODFLG=1/Yes or PLAN.PLANHIDE=1/Yes or<br>PLAN.LOSEPLFG ^=EMPTY) is a deleted PLAN.                                                                               |
| <b>258</b> | <b>TricarePlan</b>   | SP covered by TRICARE during the current round =<br>There is a PLAN where PLAN.PLANTYPE = 6/Tricare<br>& PLRO where (PLRO.PLROPLAN = PLAN.PLANNUM &<br>PLRO.PLRORND = current round & PLRO.COVTIME^=<br>empty).<br>Exclude Deleted Plans. See T.N. 52.                          |
| <b>259</b> | <b>InsurancePlan</b> | SP covered by Insurance plan other than Medicare<br>during current round =<br>PLAN where (PLANTYPE = 2/Medicaid, 3/PublicPlan, or<br>4/PrivatePlan) & PLRO where<br>(PLROPLAN=PLAN.PLANNUM & PLRORND=current<br>round & COVTIME^=empty).<br>Exclude Deleted Plans. See T.N. 52. |

---

**DESIGN NOTES**


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# ST58

Page Order # : 1000

Design Screen Type: Yes/No

Fields: Field 1: CHANGAMT

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: (ST CLAIM HEADER)  
EVENT: (CHARGE BUNDLE EVENT)  
(CHARGE BUNDLE EVENT) (etc.)

Int. Instr I: THESE AMOUNTS WERE ENTERED FROM THE MSN:

Question Text: BENEFITS DAYS USED: (DAYS USED)  
NON-COVERED CHARGES: (NON COVERED CHARGES)  
DEDUCTIBLE AND COINSURANCE: (COINSURANCE)  
YOU MAY BE BILLED: (MAY BE BILLED)

Int. Instr II: DO YOU WANT TO MAKE ANY CHANGES?

**INPUT FIELDS / ROUTING**

---

**Field1:**                    **CHANGAMT**                    ( STQ2107 )**Cheshire Name:**            COST.CHANGAMT**Item Text display:****Item Text:****Label:****Label Position:****Field Type:**                Enumerated**Type Name:**                TYesNo**Answers Allowed:**        1**Drop Down List:**        No**Lookup File:**              No**Lookup File Name:****FieldSize:****Min Value:****Max Value:****Mask:**

<b>Number</b>	<b>Label</b>	<b>Route</b>
1	Yes	ST59 - DAYSUSED ( STQ2108 )
	<b>English text: YES</b>	
2	No	BOX ST59 - (STQ2115 )
	<b>English text: NO</b>	

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**230**            **AmountRemaining**            Amount Remaining =  
COST.AREMAING.

**DESIGN NOTES**

---

**ST59**

Page Order # : 1010

Design Screen Type: Numeric

Fields:

<b>Field 1:</b>	<b>DAYSUSED</b>
<b>Field 2:</b>	<b>NONCOVRD</b>
<b>Field 3:</b>	<b>COINSUR</b>
<b>Field 4:</b>	<b>MAYBBILL</b>

<b>Enable Functions:</b>	<b>HELP</b>	No
	<b>COMMENTS</b>	No
	<b>JUMPBACK</b>	No

Roster Name:

Roster Type:

<b>Roster Functions:</b>	<b>Add Item</b>	No
	<b>Edit Item</b>	No
	<b>Delete Item</b>	No
	<b>Search Item</b>	No

<b>Grid Functions:</b>	<b>Add Line</b>	No
	<b>Delete Line</b>	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

**Multi Field display:** Vertical Alignment  
Display all fields at one time.

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

**Context Header:** (ST CLAIM HEADER)  
EVENT: (CHARGE BUNDLE EVENT)  
(CHARGE BUNDLE EVENT) (etc.)

**Int. Instr I:** MAKE ALL THE NECESSARY CORRECTIONS TO THE AMOUNTS  
THAT WERE ENTERED FROM THE (TYPE OF STATEMENT).

Question Text:

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:**                    **DAYSUSED**                    ( STQ2108 )

**Cheshire Name:**            COST.DAYSUSED

**Item Text display:**        Display previously collected response. Allow field to be updated.

**Item Text:**

**Label:**                    BENEFIT DAYS USED:

**Label Position:**        Left

**Field Type:**            Integer

**FieldSize:**

**Type Name:**            TDaysuseh

**Min Value:**            0

**Answers Allowed:**        1

**Max Value:**            120

**Drop Down List:**        No

**Mask:**

**Lookup File:**            No

**Lookup File Name:**

Number	Label	Route
1	[Continuous answer.]	ST59 - NONCOVRD ( STQ2109 )

---

**Field2:** NONCOVRD ( STQ2109 )

**Cheshire Name:** COST.NONCOVRD

**Item Text display:** Display previously collected response. Allow field to be updated.

**Item Text:**

**Label:** NON-COVERED CHARGES:  
**Label Position:** Left

<b>Field Type:</b>	Real	<b>FieldSize:</b>	
<b>Type Name:</b>	TAmt	<b>Min Value:</b>	0
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	999999.99
<b>Drop Down List:</b>	No	<b>Mask:</b>	Dollars
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

Number	Label	Route
1	[Continuous answer.]	ST59 - COINSUR ( STQ2110 )

Attribute	Route
Don't know	ST59 - COINSUR ( STQ2110 )

Refusal	ST59 - COINSUR ( STQ2110 )
---------	----------------------------



**Field3:** COINSUR ( STQ2110 )

**Cheshire Name:** COST.COINSUR

**Item Text display:** Display previously collected response. Allow field to be updated.

**Item Text:**

**Label:** DEDUCTIBLE AND COINSURANCE:  
**Label Position:** Left

<b>Field Type:</b>	Real	<b>FieldSize:</b>	
<b>Type Name:</b>	TAmt	<b>Min Value:</b>	0
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	999999.99
<b>Drop Down List:</b>	No	<b>Mask:</b>	Dollars
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

Number	Label	Route
1	[Continuous answer.]	ST59 - MAYBBILL ( STQ2111 )

Attribute	Route
Don't know	ST59 - MAYBBILL ( STQ2111 )

Refusal	ST59 - MAYBBILL ( STQ2111 )
---------	-----------------------------

**Field4:** MAYBBILL ( STQ2111 )

**Cheshire Name:** COST.MAYBBILL

**Item Text display:** Display previously collected response. Allow field to be updated.

**Item Text:**

**Label:** YOU MAY BE BILLED:

**Label Position:** Left

**Field Type:** Real

**Type Name:** TAmtnor

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:** 0

**Max Value:** 999999.99

**Mask:** Dollars

Number	Label	Route
1	[Continuous answer.]	BOX ST59 - (STQ2115 )

Attribute	Route
Don't know	BOX ST59 - (STQ2115 )

**BACKGROUND VARIABLE ASSIGNMENTS**

**AREMAING** COST.AREMAING = ST59 - MAYBBILL.

**SOFT EDIT CHECKS**

Edit #1  
 DAYSUSED = 1 - 60.  
 If not true, display messge "UNLIKELY RESPONSE, PLEASE VERIFY."

Edit #2  
 NONCOVRD = 0 - 20,000.00.  
 If not true, display messge "UNLIKELY RESPONSE, PLEASE VERIFY."

Edit #3  
 COINSUR = 0 - 20,000.00.  
 If not true, display messge "UNLIKELY RESPONSE, PLEASE VERIFY."

Edit #4  
 MAYBBILL = 0 - 20,000.00.  
 If not true, display messge "UNLIKELY RESPONSE, PLEASE VERIFY."

**HARD EDIT CHECKS**

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

# BOX ST59

Page Order # : 1020

## BOX INSTRUCTIONS

---

( STQ2115 ) IF (AMOUNT REMAINING ^= DK AND AMOUNT REMAINING ^= EMPTY)  
AND (AMOUNT REMAINING < \$1.00), GO TO BOX ST80 - (STQ2930 ).  
  
ELSE GO TO ST64 - STTCHGPAID2 ( STQ2695 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

230	AmountRemaining	Amount Remaining = COST.AREMAING.
-----	-----------------	--------------------------------------

## DESIGN NOTES

---

**ST60**

Page Order # : 1030

Design Screen Type: Numeric

<b>Fields:</b>	<b>Field 1:</b>	<b>TOTALCHG</b>
	<b>Field 2:</b>	<b>NONCOVRD</b>
	<b>Field 3:</b>	<b>COINSUR</b>
	<b>Field 4:</b>	<b>MAYBBILL</b>

<b>Enable Functions:</b>	<b>HELP</b>	No
	<b>COMMENTS</b>	No
	<b>JUMPBACK</b>	No

Roster Name:

Roster Type:

<b>Roster Functions:</b>	<b>Add Item</b>	No
	<b>Edit Item</b>	No
	<b>Delete Item</b>	No
	<b>Search Item</b>	No

<b>Grid Functions:</b>	<b>Add Line</b>	No
	<b>Delete Line</b>	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

**Multi Field display:** Vertical Alignment  
Display all fields at one time.

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

**Context Header:** (ST CLAIM HEADER)  
EVENT: (CHARGE BUNDLE EVENT)  
(CHARGE BUNDLE EVENT) (etc.)

**Int. Instr I:** ENTER THE FOLLOWING AMOUNTS FROM THE MSN.**Question Text:****Int. Instr II:**

**INPUT FIELDS / ROUTING**

---

**Field1:**                    **TOTALCHG**                    ( STQ2120 )

**Cheshire Name:**            CORO.TOTALCHG

**Item Text display:**

**Item Text:**

**Label:**                    AMOUNT CHARGED:

**Label Position:**        Left

**Field Type:**            Real

**Type Name:**            TAmt

**Answers Allowed:**      1

**Drop Down List:**      No

**Lookup File:**            No

**Lookup File Name:**

**FieldSize:**

**Min Value:**            0

**Max Value:**            999999.99

**Mask:**                    Dollars

Number	Label	Route
1	[Continuous answer.]	ST60 - NONCOVRD ( STQ2121 )

---

Attribute	Route
Don't know	ST60 - NONCOVRD ( STQ2121 )

---

Refusal	ST60 - NONCOVRD ( STQ2121 )
---------	-----------------------------

---

**Field2:** NONCOVRD ( STQ2121 )

**Cheshire Name:** COST.NONCOVRD

**Item Text display:**

**Item Text:**

**Label:** NON-COVERED CHARGES:

**Label Position:** Left

**Field Type:** Real

**Type Name:** TAmt

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**  
**Min Value:** 0  
**Max Value:** 999999.99  
**Mask:** Dollars

Number	Label	Route
1	[Continuous answer.]	ST60 - COINSUR ( STQ2122 )

Attribute	Route
Don't know	ST60 - COINSUR ( STQ2122 )

Refusal	ST60 - COINSUR ( STQ2122 )
---------	----------------------------

**Field3:** COINSUR ( STQ2122 )

**Cheshire Name:** COST.COINSUR

**Item Text display:** LABEL DISPLAY INSTRUCTIONS:  
 If ST6 - 5/MSNPARTBOutpatient or 8/MSNPARTAHospice ,  
 display "DEDUCTIBLE AND COINSURANCE:".  
 Else display "COINSURANCE:".

**Item Text:**

**Label:** (DEDUCTIBLE AND COINSURANCE/COINSURANCE);  
**Label Position:** Left

<b>Field Type:</b>	Real	<b>FieldSize:</b>	
<b>Type Name:</b>	TAMt	<b>Min Value:</b>	0
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	999999.99
<b>Drop Down List:</b>	No	<b>Mask:</b>	Dollars
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

Number	Label	Route
1	[Continuous answer.]	ST60 - MAYBBILL ( STQ2123 )

Attribute	Route
Don't know	ST60 - MAYBBILL ( STQ2123 )

Refusal	ST60 - MAYBBILL ( STQ2123 )
---------	-----------------------------



**Field4:** MAYBBILL ( STQ2123 )

**Cheshire Name:** COST.MAYBBILL

**Item Text display:**

**Item Text:**

**Label:** YOU MAY BE BILLED:

**Label Position:** Left

**Field Type:** Real

**Type Name:** TAmtnor

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:** 0

**Max Value:** 999999.99

**Mask:** Dollars

Number	Label	Route
1	[Continuous answer.]	BOX ST60 - (STQ2125 )

Attribute	Route
Don't know	BOX ST60 - (STQ2125 )

**BACKGROUND VARIABLE ASSIGNMENTS**

**STDATQNO** COST.STDATQNO = 6/ST56ST60.

**TOTALAMT** COST.TOTALAMT = ST60 - TOTALCHG.

**AREMAING** COST.AREMAING = ST60 - MAYBBILL.

**SOFT EDIT CHECKS**

Edit #1  
 TOTALCHG = 4.99 - 20,000.00.  
 If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY ."

Edit #2  
 NONCOVRD = 0 - 20,000.00.  
 If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY ."

Edit #3  
 COINSUR = 0 - 20,000.00.  
 If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY ."

Edit #4  
 MAYBBILL = 0 - 20,000.00.  
 If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY ."

Edit #5  
 If (NONCOVRD ^= DK and NONCOVRD ^= RF) and (TOTALCHG

^= DK and TOTALCHG ^= RF), then NONCOVRD <= TOTALCHG.  
If not true, display message "UNLIKELY RESPONSE. PLEASE  
VERIFY ."

Edit #6

If (COINSUR ^= DK and COINSUR ^= RF) and (TOTALCHG ^= DK  
and TOTALCHG ^= RF), then COINSUR <= TOTALCHG.  
If not true, display message "UNLIKELY RESPONSE. PLEASE  
VERIFY ."

Edit #7

If (MAYBBILL ^= DK and MAYBBILL ^= RF) and (TOTALCHG ^= DK  
and TOTALCHG ^= RF), then MAYBBILL <= TOTALCHG.  
If not true, display message "UNLIKELY RESPONSE. PLEASE  
VERIFY ."

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

# BOX ST60

**BOX INSTRUCTIONS**

---

( STQ2125 ) IF AMOUNT REMAINING = DK OR EMPTY, GO TO BOX ST63 - (STQ2135 ).  
ELSE IF AMOUNT REMAINING < \$1.00, GO TO BOX ST80 - (STQ2930 ).  
ELSE GO TO ST61 - STTCHGPAID1 ( STQ2126 ).

**ASSIGNMENTS**

---

**TECHNICAL NOTES**

---

230	AmountRemaining	Amount Remaining = COST.AREMAING.
-----	-----------------	--------------------------------------

**DESIGN NOTES**

---

**ST61**

Page Order # : 1050

Design Screen Type: Code 1

Fields: Field 1: STTCHGPAID1

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:****Question display:** Always display "(S)" in interviewer instructions in parenthesis.

If SP was covered by TRICARE and any other insurance plan besides Medicare during the current round, display "such as TRICARE or an insurance plan".

Else if SP was covered by TRICARE and is not covered by any other insurance plan besides Medicare during the current round, display "such as TRICARE"

Else if SP was not covered by TRICARE and was covered by any other insurance plan besides Medicare during the current round, display "such as an insurance plan".

Else do not display.

**Multi Field display:****Roster/Grid Instructions:****Roster/Grid display:****Report display:****TEXT:** -----

**Context Header:** (ST CLAIM HEADER)  
 EVENT: (CHARGE BUNDLE EVENT)  
 (CHARGE BUNDLE EVENT) (etc.)

**ST61**

**Int. Instr I:** REVIEW CHARGE BUNDLE ON (TYPE OF STATEMENT) WITH RESPONDENT IF YOU HAVEN'T ALREADY DONE SO. POINT OUT PROVIDER NAME, DATE(S), AND TYPE OF SERVICE. THEN ASK:

**Question Text:** So, I have an amount remaining (AMOUNT REMAINING) that Medicare didn't pay. [Have you/Has (SP)] or any other source, [such as (TRICARE/an insurance plan/TRICARE or an insurance plan)], paid any of this amount?

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

---

**Field1:** STTCHGPAID1 ( STQ2126 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

<b>Field Type:</b>	Enumerated	<b>FieldSize:</b>
<b>Type Name:</b>	TTchgPaid1	<b>Min Value:</b>
<b>Answers Allowed:</b>	1	<b>Max Value:</b>
<b>Drop Down List:</b>	No	<b>Mask:</b>
<b>Lookup File:</b>	No	
<b>Lookup File Name:</b>		

Number	Label	Route
1	SomeonePaid	BOX ST64A - (STQ2700 )
	<b>English text:</b> SP OR ANY SOURCE PAID	
2	NothingPaid	BOX ST64A - (STQ2700 )
	<b>English text:</b> NOTHING HAS BEEN PAID	
3	AmountRemainingWrong	ST62 - CHANGAMT ( STQ2127 )
	<b>English text:</b> AMOUNT REMAINING SEEMS WRONG	

Attribute	Route
Don't know	BOX ST64A - (STQ2700 )
Refusal	BOX ST64A - (STQ2700 )

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**ARWRONG** If ST61 - STTCHGPAID1 = 3/AmountRemaingWrong, set COST.ARWRONG = 1/Yes.

**TCHGPAID**                    If ST61 - STTCHGPAID1 = 1/SomeonePaid, set  
CORO.TCHGPAID = 1/Yes.  
Else if ST61 - STTCHGPAID1 = 2/NothingPaid, set  
CORO.TCHGPAID = 2/No.  
Else if ST61 - STTCHGPAID1 = DK, set  
CORO.TCHGPAID = DK.  
Else if ST61 - STTCHGPAID1 = RF, set  
CORO.TCHGPAID = RF.

---

**SOFT EDIT CHECKS**


---

**HARD EDIT CHECKS**


---

**TECHNICAL NOTES**


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- |            |                      |                                                                                                                                                                                                                                                                                 |
|------------|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>52</b>  | <b>DeletedPlans</b>  | Deleted plans that are not valid for displays or checks =<br>Any PLAN where (PLAN.PLANDFLG=1/Yes or<br>PLAN.MHMODFLG=1/Yes or PLAN.PLANHIDE=1/Yes or<br>PLAN.LOSEPLFG ^=EMPTY) is a deleted PLAN.                                                                               |
| <b>258</b> | <b>TricarePlan</b>   | SP covered by TRICARE during the current round =<br>There is a PLAN where PLAN.PLANTYPE = 6/Tricare<br>& PLRO where (PLRO.PLROPLAN = PLAN.PLANNUM &<br>PLRO.PLRORND = current round & PLRO.COVTIME^=<br>empty).<br>Exclude Deleted Plans. See T.N. 52.                          |
| <b>259</b> | <b>InsurancePlan</b> | SP covered by Insurance plan other than Medicare<br>during current round =<br>PLAN where (PLANTYPE = 2/Medicaid, 3/PublicPlan, or<br>4/PrivatePlan) & PLRO where<br>(PLROPLAN=PLAN.PLANNUM & PLRORND=current<br>round & COVTIME^=empty).<br>Exclude Deleted Plans. See T.N. 52. |

---

**DESIGN NOTES**


---

**ST62**

Page Order # : 1060

Design Screen Type: Yes/No

Fields: Field 1: CHANGAMT

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: (ST CLAIM HEADER)  
 EVENT: (CHARGE BUNDLE EVENT)  
 (CHARGE BUNDLE EVENT) (etc.)

Int. Instr I: THESE AMOUNTS WERE ENTERED FROM THE MSN:

Question Text: AMOUNT CHARGED: (TOTAL CHARGE AMOUNT)  
 NON-COVERED CHARGES: (NON COVERED CHARGES)  
 DEDUCTIBLE AND COINSURANCE: (COINSURANCE)

YOU MAY BE BILLED: (MAY BE BILLED)

Int. Instr II: DO YOU WANT TO MAKE ANY CHANGES?

**INPUT FIELDS / ROUTING**

---

**Field1:**                    **CHANGAMT**                    ( STQ2127 )**Cheshire Name:**            COST.CHANGAMT**Item Text display:****Item Text:****Label:****Label Position:****Field Type:**                Enumerated**Type Name:**                TYesNo**Answers Allowed:**         1**Drop Down List:**         No**Lookup File:**                No**Lookup File Name:****FieldSize:****Min Value:****Max Value:****Mask:**

<b>Number</b>	<b>Label</b>	<b>Route</b>
1	Yes	ST63 - TOTALCHG ( STQ2128 )
	<b>English text: YES</b>	
2	No	BOX ST63 - (STQ2135 )
	<b>English text: NO</b>	

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**230**            **AmountRemaining**            Amount Remaining =  
COST.AREMAING.

**DESIGN NOTES**

---



**ST63**

Page Order # : 1070

Design Screen Type: Numeric

<b>Fields:</b>	<b>Field 1:</b>	<b>TOTALCHG</b>
	<b>Field 2:</b>	<b>NONCOVRD</b>
	<b>Field 3:</b>	<b>COINSUR</b>
	<b>Field 4:</b>	<b>MAYBBILL</b>

<b>Enable Functions:</b>	<b>HELP</b>	No
	<b>COMMENTS</b>	No
	<b>JUMPBACK</b>	No

Roster Name:

Roster Type:

<b>Roster Functions:</b>	<b>Add Item</b>	No
	<b>Edit Item</b>	No
	<b>Delete Item</b>	No
	<b>Search Item</b>	No

<b>Grid Functions:</b>	<b>Add Line</b>	No
	<b>Delete Line</b>	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

**Multi Field display:** Vertical Alignment  
Display all fields at one time.

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

**Context Header:** (ST CLAIM HEADER)  
EVENT: (CHARGE BUNDLE EVENT)  
(CHARGE BUNDLE EVENT) (etc.)

**Int. Instr I:** MAKE ALL THE NECESSARY CORRECTIONS TO THE AMOUNTS  
THAT WERE ENTERED FROM THE (TYPE OF STATEMENT).

Question Text:

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:** TOTALCHG ( STQ2128 )

**Cheshire Name:** CORO.TOTALCHG

**Item Text display:** Display previously collected response. Allow field to be updated.

**Item Text:**

**Label:** AMOUNT CHARGED:

**Label Position:** Left

**Field Type:** Real

**Type Name:** TAmT

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:** 0

**Max Value:** 999999.99

**Mask:** Dollars

Number	Label	Route
1	[Continuous answer.]	ST63 - NONCOVRD ( STQ2129 )

Attribute	Route
Don't know	ST63 - NONCOVRD ( STQ2129 )

Refusal	ST63 - NONCOVRD ( STQ2129 )
---------	-----------------------------

**Field2:** NONCOVRD ( STQ2129 )

**Cheshire Name:** COST.NONCOVRD

**Item Text display:** Display previously collected response. Allow field to be updated.

**Item Text:**

**Label:** NON-COVERED CHARGES:

**Label Position:** Left

**Field Type:** Real

**Type Name:** TAmt

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:** 0

**Max Value:** 999999.99

**Mask:** Dollars

Number	Label	Route
1	[Continuous answer.]	ST63 - COINSUR ( STQ2130 )

Attribute	Route
Don't know	ST63 - COINSUR ( STQ2130 )

Refusal	ST63 - COINSUR ( STQ2130 )
---------	----------------------------

**Field3:** COINSUR ( STQ2130 )

**Cheshire Name:** COST.COINSUR

**Item Text display:** Display previously collected response. Allow field to be updated.

LABEL DISPLAY INSTRUCTIONS:

If ST6 - 5/MSNPARTBOutpatient or 8/MSNPARTAHospice , display "DEDUCTIBLE AND COINSURANCE:". Else display "COINSURANCE:".

**Item Text:**

**Label:** (DEDUCTIBLE AND COINSURANCE/COINSURANCE):  
**Label Position:** Left

<b>Field Type:</b>	Real	<b>FieldSize:</b>	
<b>Type Name:</b>	TAMt	<b>Min Value:</b>	0
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	999999.99
<b>Drop Down List:</b>	No	<b>Mask:</b>	Dollars
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

Number	Label	Route
1	[Continuous answer.]	ST63 - MAYBBILL ( STQ2131 )
Attribute	Route	
Don't know	ST63 - MAYBBILL ( STQ2131 )	
Refusal	ST63 - MAYBBILL ( STQ2131 )	

**Field4:** MAYBBILL ( STQ2131 )

**Cheshire Name:** COST.MAYBBILL

**Item Text display:** Display previously collected response. Allow field to be updated.

**Item Text:**

**Label:** YOU MAY BE BILLED:

**Label Position:** Left

**Field Type:** Real

**Type Name:** TAmtnor

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:** 0

**Max Value:** 999999.99

**Mask:** Dollars

Number	Label	Route
1	[Continuous answer.]	BOX ST63 - (STQ2135 )

Attribute	Route
Don't know	BOX ST63 - (STQ2135 )

#### BACKGROUND VARIABLE ASSIGNMENTS

**TOTALAMT** COST.TOTALAMT = ST63 - TOTALCHG.

**AREMAING** COST.AREMAING = ST63 - MAYBBILL.

#### SOFT EDIT CHECKS

Edit #1

TOTALCHG = 4.99 - 20,000.00.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY ."

Edit #2

NONCOVRD = 0 - 20,000.00.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY ."

Edit #3

COINSUR = 0 - 20,000.00.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY ."

Edit #4

MAYBBILL = 0 - 20,000.00.

If not true, display message "UNLIKELY RESPONSE. PLEASE VERIFY ."

Edit #5

If (NONCOVRD ^= DK and NONCOVRD ^= RF) and (TOTALCHG

^= DK and TOTALCHG ^= RF), then NONCOVRD <= TOTALCHG.  
If not true, display message "UNLIKELY RESPONSE. PLEASE  
VERIFY ."

Edit #6

If (COINSUR ^= DK and COINSUR ^= RF) and (TOTALCHG ^= DK  
and TOTALCHG ^= RF), then COINSUR <= TOTALCHG.  
If not true, display message "UNLIKELY RESPONSE. PLEASE  
VERIFY ."

Edit #7

If (MAYBBILL ^= DK and MAYBBILL ^= RF) and (TOTALCHG ^= DK  
and TOTALCHG ^= RF), then MAYBBILL <= TOTALCHG.  
If not true, display message "UNLIKELY RESPONSE. PLEASE  
VERIFY ."

#### **HARD EDIT CHECKS**

---

#### **TECHNICAL NOTES**

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#### **DESIGN NOTES**

---



**ST64**

Page Order # : 1088

Design Screen Type: Code 1

Fields: Field 1: STTCHGPAID2

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:** If ST5 - STATTYPE ^= 8/MPDPBenefit, display "AMOUNT REMAINING: \$(AMOUNT REMAINING)".  
Else do not display.

If ST5 - MCARTYPE ^= 6/MsnPartAInpatient, display "[TOTAL CHARGE = \$(TOTAL CHARGE)]".  
Else do not display.

**Question display:** Interviewer Instructions:

Always display "(S)" in interviewer instructions in parenthesis.

If ST5 - STATTYPE ^= 8/MPDPBenefit, display "PROVIDER NAME".  
Else do not display.

If ST5 - STATTYPE ^= 8/MPDPBenefit, display "THEN ASK:"  
Else display "SELECT...".

Question Text:  
If ST5 - STATTYPE = 8/MPDPBenefit, display "The total cost of prescriptions...".  
Else do not display.

If ST5 - STATTYPE = 8/MPDPBenefit, display "[Have you/Had (SP)]".  
Else then:  
If SP was covered by TRICARE and any other insurance plan besides Medicare during the current round, display "such as TRICARE or an insurance plan".  
Else if SP was covered by TRICARE and is not covered by any



**ST64**

other insurance plan besides Medicare during the current round,  
display "such as TRICARE"  
Else if SP was not covered by TRICARE and was covered by any  
other insurance plan besides Medicare during the current round,  
display "such as an insurance plan".  
Else do not display.

If only "DU" event types included in this charge bundle, display  
"[Have you/Has (SP)]".  
Else display "Besides Medicare [have you/has (SP)]".

**Multi Field display:**

**Roster/Grid Instructions:**

**Roster/Grid display:**

**Report display:**

**TEXT:** \_\_\_\_\_

**Context Header:** (ST CLAIM HEADER)  
[TOTAL CHARGE = \$(TOTAL CHARGE)]  
[AMOUNT REMAINING: \$(AMOUNT REMAINING)]

**Int. Instr I:** REVIEW CHARGE BUNDLE ON [TYPE OF STATEMENT] WITH  
RESPONDENT IF YOU HAVEN'T ALREADY DONE SO. POINT  
OUT (PROVIDER NAME), DATE(S), AND TYPE OF SERVICE(S).  
(THEN ASK:/SELECT "SP OR ANY SOURCE PAID" IF ALREADY  
KNOWN. OTHERWISE ASK:)

**Question Text:** [The total cost of prescriptions reported on this statement is (TOTAL  
CHARGE).] [[Have you/Has (SP)]/Besides Medicare, [have you/has  
(SP)] or any other source [, such as (an insurance  
plan/TRICARE/TRICARE or an insurance plan),] paid anything for  
this?

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

---

**Field1:** STTCHGPAID2 ( STQ2695 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TTChgpaid2

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	SomeonePaid	BOX ST64A - (STQ2700 )
<b>English text:</b> SP OR ANY SOURCE PAID		
2	NothingPaid	BOX ST64A - (STQ2700 )
<b>English text:</b> NOTHING HAS BEEN PAID		

Attribute	Route
Don't know	BOX ST64A - (STQ2700 )
Refusal	BOX ST64A - (STQ2700 )

#### BACKGROUND VARIABLE ASSIGNMENTS

**TCHGPAID** If ST64 - STTCHGPAID2 = 1/SomeonePaid, set  
 CORO.TCHGPAID = 1/Yes.  
 Else if ST64 - STTCHGPAID2 = 2/NothingPaid, set  
 CORO.TCHGPAID = 2/No.  
 Else if ST64 - STTCHGPAID2 = DK, set  
 CORO.TCHGPAID = DK.  
 Else if ST64 - STTCHGPAID2 = RF, set  
 CORO.TCHGPAID = RF.

#### SOFT EDIT CHECKS

#### HARD EDIT CHECKS

#### TECHNICAL NOTES

**52 DeletedPlans** Deleted plans that are not valid for displays or checks =  
 Any PLAN where (PLAN.PLANDFLG=1/Yes or  
 PLAN.MHMODFLG=1/Yes or PLAN.PLANHIDE=1/Yes or

**ST64**

- 258**      **TricarePlan**      PLAN.LOSEPLFG ^=EMPTY) is a deleted PLAN.  
SP covered by TRICARE during the current round =  
There is a PLAN where PLAN.PLANTYPE = 6/Tricare  
& PLRO where (PLRO.PLROPLAN = PLAN.PLANNUM &  
PLRO.PLRORND = current round & PLRO.COVTIME^=  
empty).  
Exclude Deleted Plans. See T.N. 52.
- 259**      **InsurancePlan**      SP covered by Insurance plan other than Medicare  
during current round =  
PLAN where (PLANTYPE = 2/Medicaid, 3/PublicPlan, or  
4/PrivatePlan) & PLRO where  
(PLROPLAN=PLAN.PLANNUM & PLRORND=current  
round & COVTIME^=empty).  
Exclude Deleted Plans. See T.N. 52.

**DESIGN NOTES**

---

**BOX ST64A**

Page Order # : 1092

**BOX INSTRUCTIONS**

---

( STQ2700 ) IF SP OR ANY SOURCE HAS PAID, GO TO BOX ST64B - (STQ2701 ).

ELSE IF (NOTHING HAS BEEN PAID) OR (RESPONDENT DOES NOT KNOW IF ANYTHING HAS BEEN PAID), GO TO BOX ST78B - (STQ2923 ).

ELSE GO TO BOX ST80 - (STQ2930 ).

**ASSIGNMENTS**

---

**TECHNICAL NOTES**

---

<b>231</b>	<b>SPOrAnySourcePaid</b>	SP or any source paid = For this COST, there is a CORO where (CORO.COROCOST=COST.COSTNUM & CORO.CORORND=current round & CORO.TCHGPAID = 1/Yes).
<b>232</b>	<b>NothingPaid</b>	Nothing paid or Respondent does not know if anything has been paid = CORO.TCHGPAID = 2/No or DK on CORO where (CORO.COROCOST = this COST.COSTNUM and CORO.CORORND = current round).

**DESIGN NOTES**

---

**BOX ST64B**

**BOX ST64B**

**Page Order # : 1093**

**BOX INSTRUCTIONS**

---

( STQ2701 )      CREATE SOURCE OF PAYMENT ROSTER .  
                     GO TO ST65 - STADSOP1 ( STQ2702 ).

**ASSIGNMENTS**

---

TSOP table is loaded once for each new Charge Bundle being asked about in ST..

TSOP key = TSOP.TSOPBASE + TSOP.TSOPNUM.

Before proceeding, delete all TSOP records and load all eligible Sources of Payments:

1st Record:

Always store SP/FAMILY:

    TSOP.TSOPTTEXT = "SP/FAMILY"  
     TSOP.TSOPTYPE = 1/SPFamily

2nd Record:

Always store Provider discount:

    TSOP.TSOPTTEXT = "PROVIDER DISCOUNT/COURTESY"  
     TSOP.TSOPTYPE = 2/ProvDiscount

3rd Record:

Always store Medicare:

    TSOP.TSOPTTEXT = "MEDICARE".  
     TSOP.TSOPTYPE = 6/Medicare  
     TSOP.TSOPPLAN = '01'  
     TSOP.TSOPPTYP = 1/Medicare  
     TSOP.TSOPDISP = "(MCAR)".

Next, store all Medicare HMOs SP was covered by during the survey reference period (not flagged as deleted).

If there is a PLAN with PLAN.PLANTYPE = 5/MHMO and a PLRO where PLRO.PLRORND >= (current round -2), store MHMO plan:

    TSOP.TSOPTTEXT = PLAN.PLNAME  
     TSOP.TSOPTYPE = 8/MHMO  
     TSOP.TSOPPLAN = PLAN.PLANNUM of MHMO plan  
     TSOP.TSOPPTYP = PLAN.PLANTYPE of MHMO plan  
     TSOP.TSOPDISP = "(MHMO)".

Repeat for all MHMO plans.

Next, store VA if eligible.

If (INTTYPE=8/ExitInterviewHadPrev and previous round HRND.VACOVER=1/Yes) or (INTTYPE ^= 8/ExitInterviewHadPrev and current round HRND.VACOVER=1/Yes), store VA:

    TSOP.TSOPTTEXT = "V.A. - DEPT. OF VETERANS AFFAIRS"  
     TSOP.TSOPTYPE = 5/VA.

Next, store MEDICARE SUBSIDY:

    TSOP.TSOPTTEXT = "MEDICARE SUBSIDY"  
     TSOP.TSOPTYPE = 11/MedicareSubsidy.

Next, store EXTRA HELP:

    TSOP.TSOPTTEXT = "EXTRA HELP"  
     TSOP.TSOPTYPE = 12/ExtraHelp.

Next, store Medicaid, Public, Private, and Tricare plans SP was covered by during the survey reference period (not flagged as deleted).  
 If there is a PLAN with (PLAN.PLANTYPE = 2/Medicaid, 3/PublicPlan, 4/PrivatePlan, 6/Tricare or 7/MPDP) and a PLRO where PLRO.PLRORND >= (current round -2), store Plan:

```

TSOP.TSOPTEXT =
  If PLAN.PLANTYPE = 2/Medicaid, TSOP.TSOPTEXT = 'MEDICAID/MEDICAID HMO';
  Else if PLAN.PLANTYPE = 6/Tricare, TSOP.TSOPTEXT = "TRICARE".
  Else TSOP.TSOPTEXT = PLAN.PLNAME;
If PLAN.PLANTYPE = 7/MPDP, set TSOP.TSOPATYPE = 10/MedicarePartD.
Else set TSOP.TSOPATYPE = 3/PlanNotMHMO
TSOP.TSOPPLAN = PLAN.PLANNUM of HI plan.
TSOP.TSOPPTYP = PLAN.PLANTYPE of HI plan.
TSOP.TSOPDISP =
  If PLAN.PLANTYPE = 2/Medicaid, TSOP.TSOPDISP = "(MCAD)".
  Else if PLAN.PLANTYPE = 3/PublicPlan, TSOP.TSOPDISP = "(PUBL)".
  Else if PLAN.PLANTYPE = 4/PrivatePlan, TSOP.TSOPDISP = "(PRIV)".
  Else if PLAN.PLANTYPE = 6/Tricare, TSOP.TSOPDISP = "(TRIC)".
  Else if PLAN.PLANTYPE = 7/MPDP, TSOP.TSOPDISP = "(MPDP)".
    
```

Repeat for all Medicaid, Public, Private, Tricare and Medicare Prescription Drug plans.

Next, store Discount Membership Plans SP was covered by during the current round:  
 If there is a DMEM and a DMRO where DMRO.DMRORND = current round, store Discount Membership plan:

```

TSOP.TSOPTEXT = DMEM.DMNAMEX
TSOP.TSOPATYPE = 9/DM
TSOP.TSOPDMEM = DMEM.DMEMNUM
    
```

Repeat for all DMEMs.

Next, store all Other Sources of Payments (not flagged as deleted).  
 Store OSOP:

```

TSOP.TSOPTEXT = OSOP.OSOPTEXT
TSOP.TSOPATYPE = 4/OSOP
TSOP.TSOPOSOP = OSOP.OSOPNUM
TSOP.TSOPDISP = "(OTHER)".
    
```

Repeat for all OSOPs.

<b>TSOPNUM</b>	Beginning with 01, create TSOP where TSOP.TSOPNUM = highest TSOP.TSOPNUM + 01.
<b>TSOPTEXT</b>	Set TSOP.TSOPTEXT as specified above.
<b>TSOPATYPE</b>	Set TSOP.TSOPATYPE as specified above.
<b>LOADFLAG</b>	Set TSOP.LOADFLAG = 1/Yes.
<b>TSOPPTYP</b>	If SOP is a Health Insurance plan, set TSOP.TSOPATYPE = PLAN.PLANTYPE.
<b>TSOPPLAN</b>	If SOP is a Health Insurance plan, set TSOP.TSOPPLAN = PLAN.PLANNUM.
<b>TSOPOSOP</b>	If SOP is an Other Source of Payment, set TSOP.TSOPOSOP = OSOP.OSOPNUM.
<b>TSOPDISP</b>	Set TSOP.TSOPDISP as specified above.
<b>TSOPDMEM</b>	If SOP is a Discount Membership plan, set TSOP.TSOPDMEM = DMEM.DMEMNUM.

**TECHNICAL NOTES**

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<b>52</b>	<b>DeletedPlans</b>	Deleted plans that are not valid for displays or checks = Any PLAN where (PLAN.PLANDFLG=1/Yes or
-----------	---------------------	-----------------------------------------------------------------------------------------------------

**BOX ST64B**

		PLAN.MHMODFLG=1/Yes or PLAN.PLANHIDE=1/Yes or PLAN.LOSEPLFG ^=EMPTY) is a deleted PLAN.
53	<b>PlanTypes</b>	Medicare: PLANTYPE=1/Medicare. Medicaid: PLANTYPE=2/Medicaid. Medicare Managed Care: PLANTYPE=5/MHMO. Tricare: PLANTYPE=6/Tricare. Public: PLANTYPE=3/PublicPlan. Private: PLANTYPE=4/PrivatePlan. Medicare Prescription Drug: PLANTYPE=7/MPDP.
252	<b>DeletedOSOPs</b>	Deleted OSOPs that are not valid for displays or checks = Any OSOP where (OSOP.OSOPHIDE=1/Yes or OSOP.LOSEOSFG ^=EMPTY) is a deleted OSOP.
117	<b>DeletedDM</b>	Deleted Discount Membership plans that are not valid for displays or checks = Any DMEM where (DMEM.LOSEDMFG ^= EMPTY) is a deleted DM.
38	<b>DMCurrentRnd</b>	SP reported having a Discount Membership plan anytime during the current round = There is a DMEM and DMRO where (DMRO.DMRODMEM = DMEM.DMEMNUM and DMRO.DMRORND = current round and DMRO.DMHAVE = 1/Yes). Exclude Deleted DM's. See T.N. 117.

**DESIGN NOTES**

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**ST65**

Page Order # : 1095

Design Screen Type: Yes/No

Fields: Field 1: STADDSOP1

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:** If ST5 - STATTYPE ^= 8/MPDPBenefit, display "AMONT REMAINING: \$(AMOUNT REMAINING)".  
Else do not display.

If ST5 - MCARTYPE ^= 6/MsnPartAInpatient, display "[TOTAL CHARGE = \$(TOTAL CHARGE)]".  
Else do not display.

**Question display:****Multi Field display:****Roster/Grid Instructions:****Roster/Grid display:****Report display:** Display report above question text.

Display all eligible Source of Payments stored on TSOP based on the following logic:

If ST5 - STATTYPE = 8/MedicarePartD, THEN:  
Do not display TSOP.TSOPTYPE = 2/ProvDiscount and 6/Medicare.  
Display all remaining Sources of Payments in the following order based on TSOP.TSOPTYPE:  
= 1/SPFamily  
= 11/MedicareSubsidy  
= 12/ExtraHelp  
= 8/MHMO

= 10/MedicarePartD  
 = 5/VA  
 = 3/PlanNotMHMO  
 = 4/OSOP  
 = 9/DM

## ELSE THEN:

Do not display TSOP.TSOPTYPE = 11/MedicareSubsidy,  
 12/ExtraHelp and 6/Medicare.  
 Display all remaining Sources of Payments in the following order  
 based on TSOP.TSOPTYPE:

= 1/SPFamily  
 = 2/ProvDiscount  
 = 8/MHMO  
 = 10/MedicarePartD  
 = 5/VA  
 = 3/PlanNotMHMO  
 = 4/OSOP  
 = 9/DM

If there is more than Source of Payment per Source of Payment  
 Type, display in order of entry in TSOP.

Report header: SOURCES OF PAYMENT

Report layout:

Column 1, header="SOP NAME".

Column 1, display = TSOP.TSOPTXT.

Column 2, header = "SOP TYPE".

Column 2, display =

If TSOP.TSOPDISP ^= empty, display TSOP.TSOPDISP.

Else do not display.

**TEXT:****Context Header:**

(ST CLAIM HEADER)  
 TOTAL CHARGE = \$(TOTAL CHARGE)  
 [AMOUNT REMAINING: \$(AMOUNT REMAINING)]

**Int. Instr I:**

ARE ALL OF THE SOURCES OF PAYMENT FOR THIS CHARGE  
 BUNDLE LISTED BELOW?

**Question Text:****Int. Instr II:**

SELECT "NO" TO ADD A SOURCE OF PAYMENT.

**INPUT FIELDS / ROUTING**

**Field1:** STADDSOP1 ( STQ2702 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TYesNo

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	Yes	ST67 - TSOPAMT ( STQ2720 )
	<b>English text:</b> YES	
2	No	ST66 - SOP_ST1 ( STQ2703 )
	<b>English text:</b> NO	

#### **BACKGROUND VARIABLE ASSIGNMENTS**

---

#### **SOFT EDIT CHECKS**

---

#### **HARD EDIT CHECKS**

---

#### **TECHNICAL NOTES**

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#### **DESIGN NOTES**

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ST65 is called from CPS when adding SOPs. TSOP will already be loaded in CPS section.

**ST66**

Page Order # : 1100

Design Screen Type: Roster

Fields: Field 1: SOP\_ST1

Enable Functions:	<b>HELP</b>	No
	<b>COMMENTS</b>	Yes
	<b>JUMPBACK</b>	Yes

Roster Name: Source Of Payment Roster

Roster Type: Multiple Item Select

Roster Functions:	<b>Add Item</b>	Yes	Display as ' Add Source of Payment '
	<b>Edit Item</b>	No	
	<b>Delete Item</b>	No	
	<b>Search Item</b>	No	

Grid Functions:	<b>Add Line</b>	No
	<b>Delete Line</b>	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:** If ST5 - STATTYPE ^= 8/MPDPBenefit, display "AMOUNT REMAINING: \$(AMOUNT REMAINING)". Else do not display.

**Question display:****Multi Field display:**

**Roster/Grid Instructions:** Display all eligible Source of Payments stored on TSOP based on the following logic:

If ST5 - STATTYPE = 8/MedicarePartD, THEN:  
 Do not display TSOP.TSOPTYPE = 2/ProvDisount and 6/Medicare.  
 Display all remaining Sources of Payments in the following order based on TSOP.TSOPTYPE:  
 = 1/SPFamily  
 = 11/MedicareSubsidy  
 = 12/ExtraHelp  
 = 8/MHMO  
 = 10/MedicarePartD  
 = 5/VA  
 = 3/PlanNotMHMO  
 = 4/OSOP  
 = 9/DM

ELSE THEN:  
 Do not display TSOP.TSOPTYPE = 11/MedicareSubsidy,  
 12/ExtraHelp and 6/Medicare.  
 Display all remaining Sources of Payments in the following order

based on TSOP.TSOPTYPE:

- = 1/SPFamily
- = 2/ProvDiscount
- = 8/MHMO
- = 10/MedicarePartD
- = 5/VA
- = 3/PlanNotMHMO
- = 4/OSOP
- = 9/DM

If there is more than Source of Payment per Source of Payment Type, display in order of entry in TSOP.

Display all loaded Source of Payments as protected rows.

**Roster/Grid display:**

COL #	HEADER	INSTRUCTIONS
1	SOP Name	Display TSOP.TSOPTTEXT.
2	SOP Type	If TSOP.TSOPDISP ^= empty, display TSOP.TSOPDISP. Else do not display.

**Report display:**

**TEXT:**

**Context Header:**

(ST CLAIM HEADER)  
TOTAL CHARGE = \$(TOTAL CHARGE)  
[AMOUNT REMAINING: \$(AMOUNT REMAINING)]

**Int. Instr I:**

ADD ALL ADDITIONAL SOURCES OF PAYMENT FOR THIS CHARGE BUNDLE.

**Question Text:**

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

---

**Field1:**                    **SOP\_ST1**                    ( STQ2703 )

**Cheshire Name:**            TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

<b>Field Type:</b>	String	<b>FieldSize:</b>	135
<b>Type Name:</b>	TSOPPick	<b>Min Value:</b>	
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	
<b>Drop Down List:</b>	No	<b>Mask:</b>	
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

Number	Label	Route
1	[Continuous answer.]	ST67 - TSOPAMT ( STQ2720 )

#### BACKGROUND VARIABLE ASSIGNMENTS

Roster details will be collected on TSOP:  
 TSOP key = TSOP.TSOPBASE + TSOP.TSOPNUM.  
 TSOP.TSOPNUM = Number of Source of Payment selected at ST66.

If adding SOP, see SOURCE OF PAYMENT ROSTER POP-UP specifications for pop-up window programming instructions.

Fields collected in Pop-Up window:  
 TSOP.TSOPNUM  
 TSOP.TSOPTEXT  
 TSOP.TSOPISHI

#### SOFT EDIT CHECKS

#### HARD EDIT CHECKS

Edit #1  
 If MEDICAID is already on the Source of Payment roster, ST66 -  
 TSOPISHI should ^= 1/Medicaid.  
 If not true, display "An add has failed. It was a duplicate."

Edit #2  
 If TRICARE is already on the Source of Payment roster, ST66 -  
 TSOPISHI should ^= 9/Tricare.  
 If not true, display "An add has failed. It was a duplicate."

#### TECHNICAL NOTES

<b>263</b>	<b>MedicaidSOP</b>	Medicaid already on SOP roster = There is a TSOP where TSOP.TSOPPTYP=2/Medicaid.
------------	--------------------	-------------------------------------------------------------------------------------

**ST66**

**264**      **TricareSOP**

Tricare already on SOP roster =  
There is a TSOP where TSOP.TSOPPTY = 6/Tricare.

**DESIGN NOTES**

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**ST67**

Page Order # : 1110

Design Screen Type: Grid

Fields: Field 1: TSOPAMT

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:** If ST5 - STATTYPE ^= 8/MPDPBenefit, display "AMOUNT REMAINING: \$(AMOUNT REMAINING)".  
Else do not display.

**Question display:** Interviewer Instruction display:

If currently administering CPS section, do not display Interviewer Instructions I.  
Else then  
If ST5 - STATTYPE = 3/MedicareAndInsurance, display "REFER TO INSURANCE STATEMENT."  
Else if ST5 = 5/MedicareAndTricare, display "REFER TO TRICARE STATEMENT."  
Else if ST5 = 6/TricareAndInsurance or 7/MedicareAndTricareAndInsurance, display "REFER TO INSURANCE AND TRICARE STATEMENTS."  
Else if ST5 = 8/MPDPBenefit, display "REFER TO MEDICARE PRESCRIPTION DRUG BENEFIT STATEMENT"  
Else do not display.

Always display "(else)" and "(SOURCE)" in parenthesis.

**Multi Field display:**

**Roster/Grid Instructions:** Display all eligible Source of Payments stored on TSOP based on the following logic:

If ST5 - STATTYPE = 8/MedicarePartD, THEN:  
Do not display TSOP.TSOPTYPE = 2/ProvDisount and 6/Medicare.



**ST67**

Display all remaining Sources of Payments in the following order based on TSOP.TSOPTYPE:

- = 1/SPFamily
- = 11/MedicareSubsidy
- = 12/ExtraHelp
- = 8/MHMO
- = 10/MedicarePartD
- = 5/VA
- = 3/PlanNotMHMO
- = 4/OSOP
- = 9/DM

ELSE THEN:

Do not display TSOP.TSOPTYPE = 11/MedicareSubsidy, 12/ExtraHelp and 6/Medicare.

Display all remaining Sources of Payments in the following order based on TSOP.TSOPTYPE:

- = 1/SPFamily
- = 2/ProvDiscount
- = 8/MHMO
- = 10/MedicarePartD
- = 5/VA
- = 3/PlanNotMHMO
- = 4/OSOP
- = 9/DM

If there is more than Source of Payment per Source of Payment Type, display in order of entry in TSOP.

CALCULATION INSTRUCTIONS FOR COLUMN 4:

If ST5 - STATTYPE = 8/MedicarePartD, THEN display COST.TOTALCHG.

Else display COST.AREMAING.

If TSOPAMT added, deleted, or updated, in any row at ST67, calculate and display (AMOUNT REMAINING MINUS TOTAL PAYMENTS) in Column 4.

AMOUNT REMAINING MINUS TOTAL PAYMENTS:

If at least one row at ST67 has TSOPAMT = DK or RF, display "NOT KNOWN".

Else if ST5 - STATTYPE = 8/MedicarePartD, THEN display (COST.TOTALCHG - TOTAL PAYMENTS).

Else display (COST.AREMAING - TOTAL PAYMENTS).

TOTAL PAYMENTS:

For each row at ST67 where (TSOPAMT ^= EMPTY and TSOPAMT ^= DK and TSOPAMT ^= RF), calculate TOTAL PAYMENTS = TOTAL PAYMENTS + TSOPAMT.

Note: Calculation is for ST67 display only. Do not update COST.AREMAING.

**Roster/Grid display:**

<b>COL #</b>	<b>HEADER</b>	<b>INSTRUCTIONS</b>
1	SOP Name	Display TSOP.TSOPTTEXT. Display Only.
2	SOP Type	If TSOP.TSOPDISP ^= empty, display TSOP.TSOPDISP. Else do not display. Display only.

ST67

3	SOP Payment	TSOP.TSOPAMT. Input field 1.
4	Amount Remaining	DISPLAY CALCULATION AS SPECIFIED ABOVE.

**Report display:**

**TEXT:** -----

**Context Header:** (ST CLAIM HEADER)  
TOTAL CHARGE = \$(TOTAL CHARGE)  
[AMOUNT REMAINING: \$(AMOUNT REMAINING)]

**Int. Instr I:** (REFER TO INSURANCE STATEMENT/REFER TO TRICARE STATEMENT/REFER TO INSURANCE AND TRICARE STATEMENTS/REFER TO MEDICARE PRESCRIPTION DRUG BENEFIT STATEMENT).

**Question Text:** Who (else) paid besides Medicare? How much did (SOURCE) pay?

**Int. Instr II:** ENTER ALL PAYMENT AMOUNTS. CORRECT PAYMENT AMOUNTS AS NECESSARY.

**INPUT FIELDS / ROUTING**

---

**Field1:** TSOPAMT ( STQ2720 )

**Cheshire Name:** TSOP.TSOPAMT  
 SQL tblTSOP is not transformed to TSOP in Cheshire.

**Item Text display:** GRID COLUMN #3

**Item Text:**

**Label:**  
**Label Position:**

<b>Field Type:</b>	Real	<b>FieldSize:</b>	
<b>Type Name:</b>	TTsopamt	<b>Min Value:</b>	0.01
<b>Answers Allowed:</b>	1	<b>Max Value:</b>	999999.99
<b>Drop Down List:</b>	No	<b>Mask:</b>	Dollars
<b>Lookup File:</b>	No		
<b>Lookup File Name:</b>			

Number	Label	Route
1	[Continuous answer.]	BOX ST67A - (STQ2780 )

Attribute	Route
Empty	BOX ST67A - (STQ2780 )

Don't know	BOX ST67A - (STQ2780 )
------------	------------------------

Refusal	BOX ST67A - (STQ2780 )
---------	------------------------

**BACKGROUND VARIABLE ASSIGNMENTS**

**SOFT EDIT CHECKS**

TSOPAMT = 0.50 - 999,999.99, DK or RF.  
 If not true, display message: "UNLIKELY RESPONSE. PLEASE VERIFY."

**HARD EDIT CHECKS**

At least one TSOPAMT = DK or RF or the sum of all TSOPAMT values for this cost > 0.00.  
 If not true, display message "THE SUM OF ALL PAYMENT AMOUNTS MUST BE GREATER THAN \$0.00 OR AT LEAST ONE PAYMENT AMOUNT MUST BE 'DON'T KNOW' OR 'REFUSED'."

**TECHNICAL NOTES**

**DESIGN NOTES**

# **BOX ST67A**

**Page Order # :** 1120

## **BOX INSTRUCTIONS**

---

( STQ2780 ) IF AT LEAST ONE SOURCE OF PAYMENT WAS ADDED AT ST66, GO TO  
BOX ST67B - (STQ2810 ).  
  
ELSE GO TO BOX ST69F - (STQ2842 ).

## **ASSIGNMENTS**

---

## **TECHNICAL NOTES**

---

## **DESIGN NOTES**

---

# BOX ST67B

## BOX INSTRUCTIONS

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( STQ2810 ) IF AT LEAST ONE SOURCE OF PAYMENT ADDED AT ST66 IS A HEALTH INSURANCE PLAN, GO TO ST67BINT - PLANINTRO ( STQ2814 ).  
  
ELSE GO TO BOX ST69B - (STQ2827 ).

## ASSIGNMENTS

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## TECHNICAL NOTES

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248	SOPPlan	Source of Payment is a HI Plan = Medicaid: TSOP.TSOPISHI=1/Medicaid Public: TSOP.TSOPISHI=2/PublicPlan Private: TSOP.TSOPISHI=3/PrivatePlan MHMO: TSOP.TSOPISHI=7/MHMO Tricare: TSOP.TSOPISHI=9/Tricare. MPDP: TSOP.TSOPISHI=10/MedicarePartD
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## DESIGN NOTES

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# ST67BINT

Page Order # : 1127

Design Screen Type: No Entry

Fields: Field 1: PLANINTRO

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display: Always display "(s)" in parenthesis.

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header:

Int. Instr I:

Question Text: Before we continue, I would like to ask you a few questions about the health insurance plan(s) you just added.

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:** PLANINTRO ( STQ2814 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated  
**Type Name:** TContinueEMPTY  
**Answers Allowed:** 1  
**Drop Down List:** No  
**Lookup File:** No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:**  
**Max Value:**  
**Mask:**

Number	Label	Route
1	Continue	ST67B_IN - NAVIGATOR ( STQ2815 )
English text: CONTINUE		

Attribute	Route
Empty	ST67B_IN - NAVIGATOR ( STQ2815 )

**BACKGROUND VARIABLE ASSIGNMENTS**

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**SOFT EDIT CHECKS**

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**HARD EDIT CHECKS**

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**TECHNICAL NOTES**

---

**DESIGN NOTES**

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# ST67B\_IN

Page Order # : 1129

Design Screen Type: Instance Navigator

Fields: Field 1: NAVIGATOR

Enable Functions: HELP No  
COMMENTS No  
JUMPBACK No

Roster Name:

Roster Type:

Roster Functions: Add Item No  
Edit Item No  
Delete Item No  
Search Item No

Grid Functions: Add Line No  
Delete Line No

## DISPLAY INSTRUCTIONS:

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Context header display:

Question display: Display all HI SOPs added at ST66.

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

## TEXT:

---

Context Header:

Int. Instr I:

Question Text:

Int. Instr II:

## INPUT FIELDS / ROUTING

---



**Field1:** NAVIGATOR ( STQ2815 )

**Cheshire Name:** N/A

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TInstanceNavigator

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	SelectItemInList	BOX ST67C - (STQ2820 )
	<b>English text:</b> ITEM SELECTED IN INSTANCE NAVIGATOR	
2	SelectContinueInterview	BOX ST69B - (STQ2827 )
	<b>English text:</b> CONTINUE INTERVIEW SELECTED	

#### BACKGROUND VARIABLE ASSIGNMENTS

#### SOFT EDIT CHECKS

#### HARD EDIT CHECKS

#### TECHNICAL NOTES

248      **SOPPlan**      Source of Payment is a HI Plan =  
 Medicaid: TSOP.TSOPISHI=1/Medicaid  
 Public: TSOP.TSOPISHI=2/PublicPlan  
 Private: TSOP.TSOPISHI=3/PrivatePlan  
 MHMO: TSOP.TSOPISHI=7/MHMO  
 Tricare: TSOP.TSOPISHI=9/Tricare.  
 MPDP: TSOP.TSOPISHI=10/MedicarePartD

#### DESIGN NOTES

**BOX ST67C**

**BOX ST67C**

**Page Order # : 1131**

**BOX INSTRUCTIONS**

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- ( STQ2820 )      CREATE A NEW HEALTH INSURANCE PLAN FOR FIRST/NEXT SOURCE OF PAYMENT ADDED AT ST66 .
- IF SOURCE OF PAYMENT IS A MEDICARE MANAGED CARE PLAN AND SP HAS A MEDICARE MANAGED CARE PLAN THAT IS CURRENT, GO TO ST68 - STMHMOCHNG1 ( STQ2821 ).
- ELSE IF SOURCE OF PAYMENT IS A MEDICARE MANAGED CARE PLAN AND SP DOES NOT HAVE A MEDICARE MANAGED CARE PLAN THAT IS CURRENT, GO TO ST69 - STSOPCURR1 ( STQ2822 ).
- ELSE IF SOURCE OF PAYMENT IS A MEDICARE PRESCRIPTION DRUG PLAN AND SP HAS A MEDICARE PRESCRIPTION DRUG PLAN THAT IS CURRENT, GO TO ST69A - STMPDPCHNG ( STQ2823 ).
- ELSE IF SOURCE OF PAYMENT IS MEDICARE PRESCRIPTION DRUG PLAN AND SP DOES NOT HAVE A MEDICARE PRESCRIPTION DRUG PLAN THAT IS CURRENT, GO TO ST69B - STSOPCURR2 ( STQ2824 ).
- ELSE IF SOURCE OF PAYMENT IS MEDICAID, GO TO HI6 - COVTIME ( HIQ4770 ).
- ELSE IF SOURCE OF PAYMENT IS A PUBLIC PLAN, GO TO HI13 - COVTIME ( HIQ5780 ).
- ELSE IF SOURCE OF PAYMENT IS A PRIVATE PLAN, GO TO HI21 - COVTIME ( HIQ6230 ).
- ELSE GO TO HIT2 - COVTIME ( HIQ5330 ).

**ASSIGNMENTS**

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If SOP added is an MHMO, Public plan, Private plan, or Medicare Prescription Drug plan create a new PLAN and current round PLRO record. See detailed instructions below.

If SOP added is Medicaid then:

If there is a PLAN where PLAN.PLANTYPE=2/Medicaid, regardless if PLAN.PLANDFLG=1/Yes or LOSEPLFG ^= empty, this stopped Medicaid plan will be restarted. Update existing PLAN flags = empty and create a current round PLRO record. See detailed instructions below.

Else if there is no PLAN where PLAN.PLANTYPE=2/Medicaid, create a new PLAN and current round PLRO record. Set PLAN.PLNAME = MEDICAID. See detailed instructions below.

If SOP added is Tricare then:

If there is a PLAN where PLAN.PLANTYPE=6/Tricare, regardless if PLAN.PLANDFLG=1/Yes or LOSEPLFG ^= empty, this stopped Tricare plan will be restarted. Update existing PLAN flags = empty and create a current round PLRO record. See detailed instructions below.

Else if there is no PLAN where PLAN.PLANTYPE=6/Tricare, create a new PLAN and current round PLRO record. Set PLAN.PLNAME = TRICARE. See detailed instructions below.

PLAN KEY = PLAN.PLANBASE + PLAN.PLANNUM

PLRO KEY = PLRO.PLROBASE + PLRO.PLROPLAN + PLRO.PLRORND

Set PLAN/PLRO fields as instructed below:

- PLANNUM**                    If creating a new PLAN, create PLAN where PLAN.PLANNUM = highest PLAN.PLANNUM + 01.
- PLANRND**                    If creating a new PLAN, set PLAN.PLANRND = current round.
- PLANTYPE**                    Set PLANTYPE based on TSOPISHI:  
                                   =1/Medicaid, PLANTYPE=2/Medicaid.  
                                   =2/PublicPlan, PLANTYPE=3/PublicPlan.  
                                   =3/PrivatePlan, PLANTYPE=4/PrivatePlan.  
                                   =7/MHMO, PLANTYPE=5/MHMO.  
                                   =9/Tricare, PLANTYPE=6/Tricare.  
                                   =10/MedicarePartD, PLANTYPE=7/MPDP.
- PLNAME**                      If creating a new PLAN,  
                                   If SOP is Medicaid, set PLAN.PLNAME = "MEDICAID".  
                                   Else if SOP is Tricare, set PLAN.PLNAME = "TRICARE".  
                                   Else set PLAN.PLNAME = TSOP.TSOPTEXT.
- PLROPLAN**                    Create PLRO where PLRO.PLROPLAN = new PLAN.PLANNUM.
- PLRORND**                      PLRO.PLRORND = current round.
- COVANYTM**                    If TSOP.TSOPISHI = 7/MHMO or 10/MedicarePartD, set PLRO.COVANYTM = 1/Yes.
- TSOPTYPE**                    If TSOP.TSOPISHI = 1/Medicaid, 2/PublicPlan, 3/PrivatePlan, 9/Tricare, set TSOP.TSOPTYPE = 3/PlanNotMHMO.  
                                   Else if TSOP.TSOPISHI = 7/MHMO, set TSOP.TSOPTYPE = 8/MHMO.  
                                   Else if TSOP.TSOPISHI=10/MedicarePartD, set TSOP.TSOPTYPE = 10/MedicarePartD.
- TSOPPTYP**                    Set TSOP.TSOPPTYP = PLAN.PLANTYPE.
- TSOPPLAN**                    Set TSOP.TSOPPLAN = PLAN.PLANNUM.
- TSOPDISP**                    Set TSOP.TSOPDISP based on PLAN.PLANTYPE:  
                                   = 2/Medicaid, TSOPDISP = "(MCAD)".  
                                   = 3/PublicPlan, TSOPDISP = "(PUBL)".  
                                   = 4/PrivatePlan, TSOPDISP = "(PRIV)".  
                                   = 5/MHMO, TSOPDISP = "(MHMO)".  
                                   = 6/Tricare, TSOPDISP = "(TRIC)".  
                                   =7/MPDP, TSOPDISP = "(MPDP)".
- PLANDFLG**                    If restarting Medicaid or Tricare plan, set PLAN.PLANDFLG = empty.
- LOSEPLFG**                    If restarting Medicaid or Tricare plan, set PLAN.LOSEPLFG = empty.
- PLSOPFLG**                    If creating new PLAN, set PLAN.PLSOPFLG = 1/Yes.

**TECHNICAL NOTES**

---

<b>248</b>	<b>SOPPlan</b>	Source of Payment is a HI Plan = Medicaid: TSOP.TSOPISHI=1/Medicaid Public: TSOP.TSOPISHI=2/PublicPlan Private: TSOP.TSOPISHI=3/PrivatePlan MHMO: TSOP.TSOPISHI=7/MHMO
------------	----------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

**BOX ST67C**

Tricare: TSOP.TSOPISHI=9/Tricare.  
MPDP: TSOP.TSOPISHI=10/MedicarePartD

- |            |                     |                                                                                                                                                                                                                                                  |
|------------|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>52</b>  | <b>DeletedPlans</b> | Deleted plans that are not valid for displays or checks =<br>Any PLAN where (PLAN.PLANDFLG=1/Yes or<br>PLAN.MHMODFLG=1/Yes or PLAN.PLANHIDE=1/Yes or<br>PLAN.LOSEPLFG ^=EMPTY) is a deleted PLAN.                                                |
| <b>65</b>  | <b>MHMOCurrent</b>  | SP has a current Medicare Managed Care plan =<br>There is a PLAN where PLAN.PLANTYPE=5/MHMO &<br>PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM &<br>PLRO.PLRORND=current round &<br>PLRO.COVCURNT=1/Yes).<br>Exclude Deleted Plans. See T.N. 52.        |
| <b>342</b> | <b>MPDPCurrent</b>  | SP has a "current" Medicare Prescription Drug plan =<br>There is a PLAN where PLAN.PLANTYPE=7/MPDP &<br>PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM &<br>PLRO.PLRORND=current round &<br>PLRO.COVCURNT=1/Yes).<br>Exclude Deleted Plans. See T.N. 52. |

**DESIGN NOTES**

---

BOX ST67C calls HI section for Medicaid, Tricare, Public Plans, and Private Plans added to SOP roster.

ST68 and ST69 collects status of MHMO plan added to SOP roster.  
ST69 calls HI section for MHMO plan if "current".

HI returns to ST at BOX ST69A.

ST69A and ST69B collect the status of MPDP plan added to SOP roster.  
ST does not call HI section for MPDP plan details.

**ST68**

Page Order # : 1135

Design Screen Type: Yes/No

Fields: Field 1: STMHMOCHNG1

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:**

**Question display:** ST68 is asked when a MHMO is added at the SOP roster and there is already a current MHMO reported in the current round. The purpose of ST68 is to remind the respondent of the current MHMO already reported and determine if the plan status has changed.

Display name of current Medicare Managed Care Plan, PLAN.PLNAME.

**Multi Field display:****Roster/Grid Instructions:****Roster/Grid display:****Report display:****TEXT:**

---

**Context Header:****Int. Instr I:**

**Question Text:** I recorded previously that (CURRENT MEDICARE MANAGED CARE PLAN NAME) was [your/(SP's)] current Medicare Managed Care Plan. Has this information changed?

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

**Field1:**                    **STMHMOCHNG1**            ( STQ2821 )

**Cheshire Name:**        TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:**            Enumerated  
**Type Name:**            TYesNoDKRF  
**Answers Allowed:**      1  
**Drop Down List:**      No  
**Lookup File:**            No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:**  
**Max Value:**  
**Mask:**

Number	Label	Route
1	Yes	ST69 - STSOPCURR1 ( STQ2822 )
English text: YES		
2	No	BOX ST69A - (STQ2825 )
English text: NO		

Attribute	Route
Don't know	BOX ST69A - (STQ2825 )
Refusal	BOX ST69A - (STQ2825 )

**BACKGROUND VARIABLE ASSIGNMENTS**

**COVCURNT**                    If ST68 - STMHMOCHNG1 = 2/No, DK, RF, set current round PLRO.COVCURNT = 2/No on MHMO PLAN added to SOP roster.

**SOFT EDIT CHECKS**

Edit #1:  
 ST68 - STMHMOCHNG1 = 1/Yes.  
 If not true, display message "INFORMATION FOR THIS PLAN WILL NOT BE COLLECTED NOW."

**HARD EDIT CHECKS****TECHNICAL NOTES**

**52 DeletedPlans**                    Deleted plans that are not valid for displays or checks = Any PLAN where (PLAN.PLANDFLG=1/Yes or

**ST68**

**65 MHMOCurrent**

PLAN.MHMODFLG=1/Yes or PLAN.PLANHIDE=1/Yes or  
PLAN.LOSEPLFG ^=EMPTY) is a deleted PLAN.

SP has a current Medicare Managed Care plan =  
There is a PLAN where PLAN.PLANTYPE=5/MHMO &  
PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM &  
PLRO.PLRORND=current round &  
PLRO.COVCURNT=1/Yes).  
Exclude Deleted Plans. See T.N. 52.

**DESIGN NOTES**

---



# ST69

Page Order # : 1137

Design Screen Type: Yes/No

Fields: Field 1: STSOPCURR1

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

## DISPLAY INSTRUCTIONS:

---

Context header display:

Question display: If SP is alive and not institutionalized, display "currently".  
Else do not display.

Display name of Medicare Managed Care Plan Name,  
PLAN.PLNAME, added at ST66 Source of Payment Roster.

If SP is deceased or institutionalized, display "on (DATE OF  
DEATH/DATE OF INSTITUTIONALIZATION)".  
Else do not display.

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

TEXT: -----

Context Header:

Int. Instr I:

Question Text: [Are you/Is (SP)/Was (SP)] (currently) covered or enrolled in (ST66  
SOP MEDICARE MANAGED CARE PLAN NAME) [on (DATE OF  
DEATH/DATE OF INSTITUTIONALIZATION)]?

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:**                    **STSOPCURR1**                    ( STQ2822 )

**Cheshire Name:**            TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:**                Enumerated  
**Type Name:**                TYesNoDKRF  
**Answers Allowed:**        1  
**Drop Down List:**        No  
**Lookup File:**              No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:**  
**Max Value:**  
**Mask:**

Number	Label	Route
1	Yes	HIMC6 - MHMORX ( HIQ4020 ) VERIFY IN HI.
----- <b>English text: YES</b> -----		
2	No	BOX ST69A - (STQ2825 )
----- <b>English text: NO</b> -----		

Attribute	Route
Don't know	BOX ST69A - (STQ2825 )
-----	
Refusal	BOX ST69A - (STQ2825 )
-----	

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**COVCURNT**                    Set PLRO.COVCURNT on PLRO where  
 PLRO.PLROPLAN = PLAN.PLANNUM of MHMO  
 added at SOP roster and PLRO.PLRORND =  
 current round:  
 If ST69 - STSOPCURR1 = 1/Yes, set  
 PLRO.COVCURNT = 1/Yes.  
 Else set PLRO.COVCURNT = 2/No.

**COVCURNT**                    If ST68 - STMHMOCHNG1 = 1/Yes and ST69 -  
 STSOPCURR1 = 1/Yes, update  
 PLRO.PLROCOVURNT = 2/No on PLRO where  
 PLRO.PLROPLAN = PLAN.PLANNUM of pre-  
 existing current MHMO and PLRO.PLRORND =  
 current round.

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

<b>59</b>	<b>SPStatus</b>	SP is Alive and not institutionalized = MRES.SPALIVE=1/Alive or empty
		SP is Alive = MRES.SPALIVE=1/Alive, 2/AliveAndInstitute, or EMPTY
		SP is Institutionalized = MRES.SPALIVE=2/AliveAndInstitute
		SP is Deceased = MRES.SPALIVE=3/Deceased.

**DESIGN NOTES**

---

ST69 calls HI section for MHMOs if MHMO added is current.

HI returns to ST at BOX ST69A.

**ST69A**

Page Order # : 1153

Design Screen Type: Yes/No

Fields: Field 1: STMPDPCHNG

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:**

**Question display:** ST69A is asked when a MPDP is added at the SOP roster and there is already a current MPDP reported in the current round. The purpose of ST69A is to remind the respondent of the current MPDP already reported and determine if the plan status has changed.

**Multi Field display:****Roster/Grid Instructions:****Roster/Grid display:****Report display:****TEXT:**

---

**Context Header:****Int. Instr I:**

**Question Text:** I recorded previously that (CURRENT MEDICARE PRESCRIPTION DRUG PLAN) was [your/(SP's)] current Medicare Prescription Drug Care Plan.

Has this information changed?

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

**Field1:** STMPDPCHNG ( STQ2823 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated  
**Type Name:** TYesNoDKRF  
**Answers Allowed:** 1  
**Drop Down List:** No  
**Lookup File:** No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:**  
**Max Value:**  
**Mask:**

Number	Label	Route
1	Yes	ST69B - STSOPCURR2 ( STQ2824 )
	<b>English text: YES</b>	
2	No	BOX ST69A - (STQ2825 )
	<b>English text: NO</b>	

Attribute	Route
Don't know	BOX ST69A - (STQ2825 )
Refusal	BOX ST69A - (STQ2825 )

**BACKGROUND VARIABLE ASSIGNMENTS**

**COVCURNT** If ST69A - STMPDPCHNG = 2/No, DK, RF, set current round PLRO.COVCURNT = 2/No for MPDP PLAN added to SOP roster.

**SOFT EDIT CHECKS**

Edit #1:  
 ST69A - STMPDPCHNG = 1/Yes.  
 If not true, display message "INFORMATION FOR THIS PLAN WILL NOT BE COLLECTED NOW."

**HARD EDIT CHECKS****TECHNICAL NOTES**

**52 DeletedPlans** Deleted plans that are not valid for displays or checks = Any PLAN where (PLAN.PLANDFLG=1/Yes or PLAN.MHMODFLG=1/Yes or PLAN.PLANHIDE=1/Yes or

**ST69A**

**342 MPDPCurrent**

PLAN.LOSEPLFG ^=EMPTY) is a deleted PLAN.

SP has a "current" Medicare Prescription Drug plan =  
There is a PLAN where PLAN.PLANTYPE=7/MPDP &  
PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM &  
PLRO.PLRORND=current round &  
PLRO.COVCURNT=1/Yes).  
Exclude Deleted Plans. See T.N. 52.

**DESIGN NOTES**

---

**ST69B**

Page Order # : 1154

Design Screen Type: Yes/No

Fields: Field 1: STSOPCURR2

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:**

**Question display:** If SP is alive and not institutionalized, display "currently".  
Else do not display.

Display name of Medicare Prescription Drug Plan, PLAN.PLNAME,  
added at ST66 Source of Payment Roster.

If SP is deceased or institutionalized, display "on (DATE OF  
DEATH/DATE OF INSTITUTIONALIZATION)".  
Else do not display.

**Multi Field display:****Roster/Grid Instructions:****Roster/Grid display:****Report display:****TEXT:** -----**Context Header:****Int. Instr I:**

**Question Text:** [Are you/Is (SP)/Was (SP)] (currently) covered or enrolled in (ST66  
SOP MEDICARE PRESCRIPTION DRUG PLAN) [on (DATE OF  
DEATH/DATE OF INSTITUTIONALIZATION)]?

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:**                    **STSOPCURR2**                    ( STQ2824 )

**Cheshire Name:**            TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:**                Enumerated  
**Type Name:**                TYesNoDKRF  
**Answers Allowed:**         1  
**Drop Down List:**         No  
**Lookup File:**                No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:**  
**Max Value:**  
**Mask:**

Number	Label	Route
1	Yes	BOX ST69A - (STQ2825 )
	<b>English text: YES</b>	
2	No	BOX ST69A - (STQ2825 )
	<b>English text: NO</b>	

Attribute	Route
Don't know	BOX ST69A - (STQ2825 )
Refusal	BOX ST69A - (STQ2825 )

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**COVCURNT**                    Set PLRO.COVCURNT on PLRO where  
 PLRO.PLROPLAN = PLAN.PLANNUM of MPDP  
 added at SOP roster and PLRO.PLRORND =  
 current round:  
 If ST69B - STSOPCURR2 = 1/Yes, set  
 PLRO.COVCURNT = 1/Yes.  
 Else set PLRO.COVCURNT = 2/No.

**COVCURNT**                    If ST69A - STMPDPCHNG = 1/Yes and ST69B -  
 STSOPCURR2 = 1/Yes, update  
 PLRO.PLROCOVURNT = 2/No on PLRO where  
 PLRO.PLROPLAN = PLAN.PLANNUM of pre-  
 existing current MPDP and PLRO.PLRORND =  
 current round.

**SOFT EDIT CHECKS**

---



**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**59**      **SPStatus**      SP is Alive and not institutionalized =  
MRES.SPALIVE=1/Alive or empty

SP is Alive =  
MRES.SPALIVE=1/Alive, 2/AliveAndInstitute, or EMPTY

SP is Institutionalized =  
MRES.SPALIVE=2/AliveAndInstitute

SP is Deceased =  
MRES.SPALIVE=3/Deceased.

**DESIGN NOTES**

---

# BOX ST69A

Page Order # : 1155

## BOX INSTRUCTIONS

---

( STQ2825 ) GO TO ST67B\_IN - NAVIGATOR ( STQ2815 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

<b>248</b>	<b>SOPPlan</b>	Source of Payment is a HI Plan = Medicaid: TSOP.TSOPISHI=1/Medicaid Public: TSOP.TSOPISHI=2/PublicPlan Private: TSOP.TSOPISHI=3/PrivatePlan MHMO: TSOP.TSOPISHI=7/MHMO Tricare: TSOP.TSOPISHI=9/Tricare. MPDP: TSOP.TSOPISHI=10/MedicarePartD
------------	----------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

## DESIGN NOTES

---

HI returns to ST at BOX ST69A.

# BOX ST69B

Page Order # : 1157

## BOX INSTRUCTIONS

---

( STQ2827 ) IF AT LEAST ONE SOURCE OF PAYMENT ADDED AT ST66 IS A DISCOUNT MEMBERSHIP PLAN, GO TO ST69C - DMEMINTRO ( STQ2828 ).  
ELSE TO GO BOX ST69E - (STQ2840 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

374 SOPDmem Source of Payment is a Discount Membership Plan = TSOP.TSOPISHI = 8/DM.

## DESIGN NOTES

---

# ST69C

Page Order # : 1158

Design Screen Type: No Entry

Fields: Field 1: DMEMINTRO

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display: Always display "(s)" in parenthesis.

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header:

Int. Instr I:

Question Text: Before we continue, I would like to ask you a few questions about the discount membership plan(s) you just added.

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:** DMEMINTRO ( STQ2828 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated  
**Type Name:** TContinueEMPTY  
**Answers Allowed:** 1  
**Drop Down List:** No  
**Lookup File:** No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:**  
**Max Value:**  
**Mask:**

Number	Label	Route
1	Continue	ST69C_IN - NAVIGATOR ( STQ2830 )
English text: CONTINUE		

Attribute	Route
Empty	ST69C_IN - NAVIGATOR ( STQ2830 )

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

# ST69C\_IN

Page Order # : 1159

Design Screen Type: Instance Navigator

Fields: Field 0: NAVIGATOR

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display: Display all DM's added at ST66 SOP roster.

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header:

Int. Instr I:

Question Text:

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field0:** NAVIGATOR ( STQ2830 )

**Cheshire Name:** N/A

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TInstanceNavigator

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	SelectItemInList	BOX ST69C - (STQ2835 )
	<b>English text:</b> ITEM SELECTED IN INSTANCE NAVIGATOR	
2	SelectContinueInterview	BOX ST69E - (STQ2840 )
	<b>English text:</b> CONTINUE INTERVIEW SELECTED	

#### BACKGROUND VARIABLE ASSIGNMENTS

---

#### SOFT EDIT CHECKS

---

#### HARD EDIT CHECKS

---

#### TECHNICAL NOTES

---

#### DESIGN NOTES

---

**BOX ST69C**

Page Order # : 1160

**BOX INSTRUCTIONS**

---

( STQ2835 )      CREATE A NEW DISCOUNT MEMBERSHIP PLAN FOR THE SOURCE OF  
 PAYMENT ADDED AT ST66 .

GO TO DM4 - DMSERVIC ( DMQ1070 ).

**ASSIGNMENTS**

---

DM details are collected on DMEM and DMRO:  
 DMEM key = DMEM.DMEMBASE + DMEM.DMEMNUM  
 DMEM.DMEMNUM = Number of DM created at BOX ST69C.

DMRO key = DMRO.DMROBASE + DMRO.DMRODMEM + DMRO.DMRORND  
 DMRO.DMRODMEM = DMEM.DMEMNUM of DM created at BOX ST69C.  
 DMRO.DMRORND = current round.

If SOP added is a Discount Membership plan, create a new DMEM and current round  
 DMRO record. See detailed instructions below.

<b>DMEMNUM</b>	DMEM.DMEMNUM = highest DMEM.DMEMNUM + 01.
<b>DMEMRND</b>	DMEM.DMEMRND = current round.
<b>DMRODMEM</b>	DMRO.DMRODMEM = DMEM.DMEMNUM.
<b>DMRORND</b>	DMRO.DMRORND = current round.
<b>DMHAVE</b>	DMRO.DMHAVE = 1/Yes.
<b>DMNAMEX</b>	DMEM.DMNAMEX = TSOP.TSOPTEXT.
<b>DMSOPFLG</b>	DMEM.DMSOPFLG = 1/Yes.
<b>TSOPTYPE</b>	TSOP.TSOPTYPE = 9/DM.
<b>TSOPDMEM</b>	TSOP.TSOPDMEM = DMEM.DMEMNUM.

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

Calls DM section for Discount Membership plans added to SOP roster.

DM returns to ST at BOX ST69D.



# BOX ST69D

Page Order # : 1165

## BOX INSTRUCTIONS

---

( STQ2838 ) GO TO ST69C\_IN - NAVIGATOR ( STQ2830 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

**374**      **SOPDmem**                      Source of Payment is a Discount Membership Plan =  
TSOP.TSOPISHI = 8/DM.

## DESIGN NOTES

---

DM returns to ST at BOX ST69D.

NOTE ON ELSE CONDITION:  
Once all items at ST69C\_IN Instance Navigator screen are DONE,  
routing will return to ST69C\_IN until Interviewer selects CONTINUE  
INTERVIEW. When ST69C\_IN CONTINUE INTERVIEW is selected,  
BOX ST69D specifies routing to the next item.

The next item on the route is to BOX ST69E to check for OSOP's added  
at SOP roster.

**BOX ST69E**

Page Order # : 1167

**BOX INSTRUCTIONS**

---

( STQ2840 ) IF AN "OTHER SOURCE OF PAYMENT" ADDED AT ST66, CREATE AN OSOP FOR EACH SOURCE OF PAYMENT ADDED AT ST66 THAT IS AN "OTHER SOURCE OF PAYMENT" .

GO TO BOX ST69F - (STQ2842 ).

**ASSIGNMENTS**

---

Other Source of Payment details will be collected on OSOP:  
 OSOP key = OSOP.OSOPBASE + OSOP.OSOPNUM  
 OSOP.OSOPNUM = Number of Other Source of Payment generated at BOX ST69E.

Create OSOP record for each OTHER SOURCE OF PAYMENT added at ST66.

Set OSOP fields as specified below.

<b>OSOPNUM</b>	OSOP.OSOPNUM = highest OSOP.OSOPNUM + 01.
<b>OSOPRNDC</b>	OSOP.OSOPRNDC = current round.
<b>OSOPEXT</b>	OSOP.OSOPEXT = TSOP.TSOPEXT.
<b>TSOPTYPE</b>	TSOP.TSOPTYPE = 4/OSOP.
<b>TSOPOSOP</b>	TSOP.TSOPOSOP = OSOP.OSOPNUM.
<b>TSOPDISP</b>	TSOP.TSOPDISP = "(OTHER)".

**TECHNICAL NOTES**

---

<b>339</b>	<b>SOPISOSOP</b>	Source of Payment is an "Other Source of Payment" = TSOP.TSOPISHI = 4/NotHIPlanVA, 5/MilitaryPlanNotVA, or 6/NotSPsPlan.
------------	------------------	--------------------------------------------------------------------------------------------------------------------------

**DESIGN NOTES**

---

**BOX ST69F**

Page Order # : 1168

**BOX INSTRUCTIONS**

---

( STQ2842 ) IF ST5 - STATTYPE = 8/MPDPBenefit and ((TOTAL CHARGE ^= DK and TOTAL CHARGE ^= RF) and (ALL PAYMENTS ENTERED AT ST67 ^= DK AND ^= RF)) AND ((TOTAL CHARGE IS > TOTAL PAYMENTS ENTERED AT ST67) AND (THE DIFFERENCE BETWEEN TOTAL CHARGE AND TOTAL PAYMENTS ENTERED AT ST67 IS > \$1.00)), GO TO ST73 - AMTSCORR ( STQ2875 ).

IF (AMOUNT REMAINING ^= DK AND AMOUNT REMAINING ^= EMPTY) AND (AT LEAST ONE PAYMENT ENTERED AT ST67 = DK OR RF) AND (AT LEAST ONE PAYMENT ENTERED AT ST67 ^= DK AND ^= RF) AND (TOTAL OF ALL NON-MISSING PAYMENTS ENTERED AT ST67 IS > AMOUNT REMAINING), GO TO ST71 - AMTSCORR ( STQ2860 ).

ELSE IF (AMOUNT REMAINING ^= DK AND AMOUNT REMAINING ^= EMPTY) AND (ALL PAYMENTS ENTERED AT ST67 ^= DK AND ^= RF) AND (THE ABSOLUTE VALUE OF THE DIFFERENCE BETWEEN THE TOTAL PAYMENTS ENTERED AT ST67 AND AMOUNT REMAINING IS > \$1.00), GO TO ST70 - AMTSCORR ( STQ2850 ).

ELSE GO TO BOX ST77C - (STQ2910 ).

**ASSIGNMENTS**

---

**TECHNICAL NOTES**

---

<b>230</b>	<b>AmountRemaining</b>	Amount Remaining = COST.AREMAING.
<b>255</b>	<b>TotalPayments</b>	Total of non-missing Payments entered in SOP grid = For each TSOP where (TSOP.TSOPAMT ^= DK and TSOP.TSOPAMT ^= RF and TSOP.TSOPAMT ^= EMPTY), then Total Payments = Total Payments + TSOP.TSOPAMT.

**DESIGN NOTES**

---

**ST70**

Page Order # : 1170

Design Screen Type: Code 1

Fields: Field 1: AMTSCORR

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:** If (COST.MCPAYAMT ^= EMPTY and COST.MCPAYAMT ^= DK and COST.MCPAYAMT ^= RF), display "AFTER MEDICARE PAYMENT".  
Else do not display.

**Question display:** Total Payments = If (TSOP.TSOPAMT ^= DK and TSOP.TSOPAMT ^= RF and TSOP.TSOPAMT ^= EMPTY), Total Payments = Total Payments + TSOP.TSOPAMT.

If Total Payments > Amount Remaining then  
  Display "more payments than the amount left after Medicare paid".  
  Display "overpaid".  
  DIFFERENCE = Display the remainder of (Total Payments - Amount Remaining)  
Else then  
  Display "some amount still unpaid".  
  Display "unpaid".  
  DIFFERENCE = Display the remainder of (Amount Remaining - Total Payments).

**Multi Field display:****Roster/Grid Instructions:****Roster/Grid display:****Report display:** Display report above question text.

**ST70**

Display all Source of Payments where TSOP.TSOPAMT ^= empty in the following order based on TSOP.TSOPTYPE:

- = 1/SPFamily
- = 2/ProvDiscount
- =11/MedicareSubsidy
- =12/ExtraHelp
- = 6/Medicare
- = 8/MHMO
- =10/MedicarePartD
- = 5/VA
- = 3/PlanNotMHMO
- = 4/OSOP
- = 9/DM

If there is more than Source of Payment per Source of Payment Type, display in order of entry in TSOP.  
Not all TSOP.TSOPTYPEs will be applicable.

Report header:  
"NON-MEDICARE PAYMENTS"

Report layout:  
Column 1, header="SOP NAME".  
Column 1, display = TSOP.TSOPTTEXT.

Column 2, header = "PAYMENT".  
Column 2, display =  
If TSOP.TSOPAMT = DK, display "DK".  
Else if TSOP.TSOPAMT = RF, display "RF".  
Else display TSOP.TSOPAMT.

**TEXT:** -----

**Context Header:** (ST CLAIM HEADER)  
TOTAL CHARGE = \$(TOTAL CHARGE)  
AMOUNT REMAINING (AFTER MEDICARE PAYMENT):  
\$(AMOUNT REMAINING)

**Int. Instr I:**

**Question Text:** There seems to be (some amount still unpaid/more payments than the amount left after Medicare paid). The total of non-Medicare payments is \$(TOTAL PAYMENTS). The amount (unpaid/overpaid) is \$(DIFFERENCE BETWEEN PAYMENTS AND AMOUNT REMAINING). Is that correct?

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

---

**Field1:** AMTSCORR ( STQ2850 )

**Cheshire Name:** CORO.AMTSCORR

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TAmtdscorr

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	YesEntriesCorrect	BOX ST77C - (STQ2910 )
	<b>English text:</b> ENTRIES ABOVE ARE CORRECT	
2	NoAddCorrectSOP	ST65 - STADDSOP1 ( STQ2702 )
	<b>English text:</b> NO, SOP NEEDS ADDITION OR CORRECTION	
3	AmountRemainingIncorrect	ST72 - ENTERCOM ( STQ2870 )
	<b>English text:</b> AMOUNT REMAINING SEEMS INCORRECT	

Attribute	Route
Don't know	BOX ST77C - (STQ2910 )
Refusal	BOX ST77C - (STQ2910 )

#### BACKGROUND VARIABLE ASSIGNMENTS

#### SOFT EDIT CHECKS

#### HARD EDIT CHECKS

#### TECHNICAL NOTES

230      **AmountRemaining**      Amount Remaining =  
COST.AREMAING.

**ST70**

**255 TotalPayments**

Total of non-missing Payments entered in SOP grid =  
For each TSOP where (TSOP.TSOPAMT ^= DK and  
TSOP.TSOPAMT ^= RF and TSOP.TSOPAMT ^=  
EMPTY), then Total Payments = Total Payments +  
TSOP.TSOPAMT.

**DESIGN NOTES**

---

**ST71**

Page Order # : 1190

Design Screen Type: Code 1

Fields: Field 1: AMTSCORR

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:** If (COST.MCPAYAMT ^= EMPTY and COST.MCPAYAMT ^= DK and COST.MCPAYAMT ^= RF), display "AFTER MEDICARE PAYMENT".  
Else do not display.

**Question display:** If COST.TOTALAMT = DK, RF or empty, display "AMOUNT REMAINING".  
Else display "TOTAL CHARGE".

**Multi Field display:****Roster/Grid Instructions:****Roster/Grid display:****Report display:** Display report above question text.

Display all Source of Payments where TSOP.TSOPAMT ^= empty in the following order based on TSOP.TSOPTYPE:

- = 1/SPFamily
- = 2/ProvDiscount
- =11/MedicareSubsidy
- =12/ExtraHelp
- = 6/Medicare
- = 8/MHMO
- =10/MedicarePartD
- = 5/VA
- = 3/PlanNotMHMO
- = 4/OSOP



= 9/DM

If there is more than Source of Payment per Source of Payment Type, display in order of entry in TSOP.  
Not all TSOP.TSOPTYPEs will be applicable.

Report header:  
"NON-MEDICARE PAYMENTS"

Report layout:  
Column 1, header="SOP NAME".  
Column 1, display = TSOP.TSOPTTEXT.

Column 2, header = "PAYMENT".  
Column 2, display =  
If TSOP.TSOPAMT = DK, display "DK".  
Else if TSOP.TSOPAMT = RF, display "RF".  
Else display TSOP.TSOPAMT.

**TEXT:**

---

**Context Header:** (ST CLAIM HEADER)  
TOTAL CHARGE = \$(TOTAL CHARGE)  
AMOUNT REMAINING (AFTER MEDICARE PAYMENT):  
\$(AMOUNT REMAINING)

**Int. Instr I:**

**Question Text:**

**Int. Instr II:** THE AMOUNTS ENTERED FOR THE SOURCES OF PAYMENT EQUAL OR EXCEED THE (TOTAL CHARGE/AMOUNT REMAINING), WITH AT LEAST ONE SOP BEING A MISSING AMOUNT. VERIFY ALL AMOUNTS AS ENTERED.

**INPUT FIELDS / ROUTING**

---

**Field1:**                    **AMTSCORR**                    ( STQ2860 )

**Cheshire Name:**            CORO.AMTSCORR

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:**                Enumerated

**Type Name:**                TAmtdscorr

**Answers Allowed:**        1

**Drop Down List:**        No

**Lookup File:**                No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	YesEntriesCorrect	BOX ST77C - (STQ2910 )
	<b>English text:</b> ENTRIES ABOVE ARE CORRECT	
2	NoAddCorrectSOP	ST65 - STADDSOP1 ( STQ2702 )
	<b>English text:</b> NO, SOP NEEDS ADDITION OR CORRECTION	
3	AmountRemainingIncorrect	ST72 - ENTERCOM ( STQ2870 )
	<b>English text:</b> AMOUNT REMAINING SEEMS INCORRECT	

Attribute	Route
Don't know	BOX ST77C - (STQ2910 )
Refusal	BOX ST77C - (STQ2910 )

#### BACKGROUND VARIABLE ASSIGNMENTS

#### SOFT EDIT CHECKS

#### HARD EDIT CHECKS

#### TECHNICAL NOTES

**230**            **AmountRemaining**            Amount Remaining =  
COST.AREMAING.

#### DESIGN NOTES

**ST72**

Page Order # : 1200

Design Screen Type: No Entry

Fields: Field 1: ENTERCOM

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:** If (COST.MCPAYAMT ^= EMPTY and COST.MCPAYAMT ^= DK and COST.MCPAYAMT ^= RF), display "AFTER MEDICARE PAYMENT".  
Else do not display.

**Question display:** If NO payments entered at ST67 = DK or RF, display "THE TOTAL OF NON-MEDICARE...".  
Else do not display.

Total Payments = If (TSOP.TSOPAMT ^= DK and TSOP.TSOPAMT ^= RF and TSOP.TSOPAMT ^= EMPTY), Total Payments = Total Payments + TSOP.TSOPAMT.

If Total Payments > Amount Remaining then  
Display "OVERPAID".  
DIFFERENCE = Display the remainder of (Total Payments - Amount Remaining)  
Else then  
Display "UNPAID".  
DIFFERENCE = Display the remainder of (Amount Remaining - Total Payments).

**Multi Field display:****Roster/Grid Instructions:****Roster/Grid display:****Report display:** Display report above question text.

Display all Source of Payments where TSOP.TSOPAMT ^= empty in the following order based on TSOP.TSOPTYPE:

= 1/SPFamily  
 = 2/ProvDiscount  
 =11/MedicareSubsidy  
 =12/ExtraHelp  
 = 6/Medicare  
 = 8/MHMO  
 =10/MedicarePartD  
 = 5/VA  
 = 3/PlanNotMHMO  
 = 4/OSOP  
 = 9/DM

If there is more than Source of Payment per Source of Payment Type, display in order of entry in TSOP.  
 Not all TSOP.TSOPTYPEs will be applicable.

Report header:  
 "NON-MEDICARE PAYMENTS"

Report layout:  
 Column 1, header="SOP NAME".  
 Column 1, display = TSOP.TSOPTTEXT.

Column 2, header = "PAYMENT".  
 Column 2, display =  
 If TSOP.TSOPAMT = DK, display "DK".  
 Else if TSOP.TSOPAMT = RF, display "RF".  
 Else display TSOP.TSOPAMT.

#### TEXT:

---

**Context Header:** (ST CLAIM HEADER)  
 TOTAL CHARGE = \$(TOTAL CHARGE)  
 AMOUNT REMAINING (AFTER MEDICARE PAYMENT):  
 \$(AMOUNT REMAINING)

**Int. Instr I:**

**Question Text:**

**Int. Instr II:** [THE TOTAL OF NON-MEDICARE PAYMENTS IS \$(TOTAL PAYMENTS). THE AMOUNT (UNPAID/OVERPAID) IS \$(DIFFERENCE BETWEEN PAYMENTS AND AMOUNT REMAINING).]

USE COMMENTS TO EXPLAIN WHY THE AMOUNT REMAINING SEEMS INCORRECT.

#### INPUT FIELDS / ROUTING

---

**Field1:** ENTERCOM ( STQ2870 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TContinueEMPTY

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	Continue	BOX ST77C - (STQ2910 )
English text: CONTINUE		

Attribute	Route
Empty	BOX ST77C - (STQ2910 )

**BACKGROUND VARIABLE ASSIGNMENTS**

**SOFT EDIT CHECKS**

**HARD EDIT CHECKS**

**TECHNICAL NOTES**

- 230 AmountRemaining** Amount Remaining = COST.AREMAING.
- 255 TotalPayments** Total of non-missing Payments entered in SOP grid = For each TSOP where (TSOP.TSOPAMT ^= DK and TSOP.TSOPAMT ^= RF and TSOP.TSOPAMT ^= EMPTY), then Total Payments = Total Payments + TSOP.TSOPAMT.

**DESIGN NOTES**

**ST73**

Page Order # : 1210

Design Screen Type: Yes/No

Fields: Field 1: AMTSCORR

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:**

**Question display:** Total Payments = If (TSOP.TSOPAMT ^= DK and TSOP.TSOPAMT ^= RF and TSOP.TSOPAMT ^= EMPTY), Total Payments = Total Payments + TSOP.TSOPAMT.

DIFFERENCE = Display the remainder of (Total Charge - Total Payments).

**Multi Field display:****Roster/Grid Instructions:****Roster/Grid display:****Report display:** Display report above question text.

Display all Source of Payments where TSOP.TSOPAMT ^= empty in the following order based on TSOP.TSOPTYPE:

- = 1/SPFamily
- = 2/ProvDiscount
- =11/MedicareSubsidy
- =12/ExtraHelp
- = 6/Medicare
- = 8/MHMO
- =10/MedicarePartD
- = 5/VA
- = 3/PlanNotMHMO
- = 4/OSOP

= 9/DM

If there is more than Source of Payment per Source of Payment Type, display in order of entry in TSOP.  
Not all TSOP.TSOPTYPEs will be applicable.

Report header:  
"NON-MEDICARE PAYMENTS"

Report layout:  
Column 1, header="SOP NAME".  
Column 1, display = TSOP.TSOPTTEXT.

Column 2, header = "PAYMENT".  
Column 2, display =  
If TSOP.TSOPAMT = DK, display "DK".  
Else if TSOP.TSOPAMT = RF, display "RF".  
Else display TSOP.TSOPAMT.

**TEXT:** -----

**Context Header:** (ST CLAIM HEADER)  
TOTAL CHARGE = \$(TOTAL CHARGE)

**Int. Instr I:**

**Question Text:** There seems to be some amount still unpaid. The total of non-Medicare payments is \$(TOTAL PAYMENTS). The amount unpaid is \$(DIFFERENCE BETWEEN TOTAL CHARGE AND PAYMENTS). Is that correct?

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

---

**Field1:**                   **AMTSCORR**                   ( STQ2875 )

**Cheshire Name:**           CORO.AMTSCORR

**Item Text display:**       Do not display response option  
3/AmountRemainingIncorrect.

**Item Text:**

**Label:**

**Label Position:**

**Field Type:**               Enumerated

**Type Name:**               TAmtscorr

**Answers Allowed:**         1

**Drop Down List:**         No

**Lookup File:**             No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	YesEntriesCorrect	ST74 - INFOEXPLAIN ( STQ2877 )
	<b>English text:</b> ENTRIES ABOVE ARE CORRECT	
2	NoAddCorrectSOP	ST65 - STADDSOP1 ( STQ2702 )
	<b>English text:</b> NO, SOP NEEDS ADDITION OR CORRECTION	
3	AmountRemainingIncorrect	DO NOT DISPLAY.
	<b>English text:</b> AMOUNT REMAINING SEEMS INCORRECT	

Attribute	Route
Don't know	BOX ST77C - (STQ2910 )
Refusal	BOX ST77C - (STQ2910 )

#### BACKGROUND VARIABLE ASSIGNMENTS

#### SOFT EDIT CHECKS

#### HARD EDIT CHECKS

#### TECHNICAL NOTES

#### DESIGN NOTES



**ST74**

Page Order # : 1220

Design Screen Type: Yes/No

Fields: Field 1: INFOEXPLAIN

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:** Total Payments = If (TSOP.TSOPAMT ^= DK and TSOP.TSOPAMT ^= RF and TSOP.TSOPAMT ^= EMPTY), Total Payments = Total Payments + TSOP.TSOPAMT.

DIFFERENCE = Display the remainder of (Total Charge - Total Payments).

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

**Context Header:** AMOUNT UNPAID: (DIFFERNCE BETWEEN TOTAL CHARGE AND PAYMENTS)

Int. Instr I:

Question Text:

**Int. Instr II:** IS THERE ADDITIONAL INFORMATION ON THE MEDICARE PRESCRIPTION DRUG BENEFIT STATEMENT THAT EXPLAINS THE AMOUNT STILL UNPAID?

**INPUT FIELDS / ROUTING**

---

**Field1:** INFOEXPLAIN ( STQ2877 )**Cheshire Name:** TEMP**Item Text display:****Item Text:****Label:****Label Position:****Field Type:** Enumerated**Type Name:** TYesNo**Answers Allowed:** 1**Drop Down List:** No**Lookup File:** No**Lookup File Name:****FieldSize:****Min Value:****Max Value:****Mask:**

Number	Label	Route
1	Yes	ST75 - ENTERCOM2 ( STQ2880 )
	<b>English text: YES</b>	
2	No	BOX ST77C - (STQ2910 )
	<b>English text: NO</b>	

**BACKGROUND VARIABLE ASSIGNMENTS**

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**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

**ST75**

Page Order # : 1230

Design Screen Type: No Entry

Fields: Field 1: ENTERCOM2

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

**Context header display:** Total Payments = If (TSOP.TSOPAMT ^= DK and TSOP.TSOPAMT ^= RF and TSOP.TSOPAMT ^= EMPTY), Total Payments = Total Payments + TSOP.TSOPAMT.

DIFFERENCE = Display the remainder of (Total Charge - Total Payments).

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

**Context Header:** AMOUNT UNPAID: \$(DIFFERENCE BETWEEN TOTAL CHARGE AND PAYMENTS)

Int. Instr I:

Question Text:

**Int. Instr II:** USE COMMENTS TO ENTER ANY INFORMATION THAT EXPLAINS THE AMOUNT STILL UNPAID.

**INPUT FIELDS / ROUTING**

---

**Field1:** ENTERCOM2 ( STQ2880 )**Cheshire Name:** TEMP**Item Text display:****Item Text:****Label:****Label Position:****Field Type:** Enumerated**Type Name:** TContinueEMPTY**Answers Allowed:** 1**Drop Down List:** No**Lookup File:** No**Lookup File Name:****FieldSize:****Min Value:****Max Value:****Mask:**

Number	Label	Route
1	Continue	BOX ST77C - (STQ2910 )
English text: CONTINUE		

Attribute	Route
Empty	BOX ST77C - (STQ2910 )

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

**BOX ST77C**

**BOX ST77C**

**Page Order # : 1240**



**PAYMCOST** If creating a new PAYM record, create PAYM where  
PAYM.PAYMCOST = this COST.COSTNUM.

**PAYMNUM** If creating a new PAYM record, set  
PAYM.PAYMNUM = highest PAYM.PAYMNUM for  
PAYM.PAYMCOST + 01.

**PAYMRNDC** If creating a new PAYM record, set  
PAYM.PAYMRNDC = current round.

**PAYMTYPE** If creating a new PAYM record, set  
PAYM.PAYMTYPE = TSOP.TSOPTYPE.

**PAYMPLAN** If creating a new PAYM record, if TSOP.TSOPTYPE  
= 3/PlanNotMHMO, 8/MHMO or 10/MedicarePartD,  
set PAYM.PAYMPLAN = TSOP.TSOPPLAN.

**PAYMOSOP** If creating a new PAYM record, if TSOP.TSOPTYPE  
= 4/OSOP, set PAYM.PAYMOSOP =  
TSOP.TSOPOSOP.

**PAYMISHI** If creating a new PAYM record, if TSOP.TSOPISHI  
^= empty, set PAYM.PAYMISHI = TSOP.TSOPISHI.

**PAYMAMT** PAYM.PAYMAMT = TSOP.TSOPAMT.

**PAYMDMEM** If creating a new PAYM record, if TSOP.TSOPTYPE  
= 9/DM, set PAYM.PAYMDMEM =  
TSOP.TSOPDMEM.

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

# BOX ST77D

## BOX INSTRUCTIONS

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( STQ2915 ) IF THE SP OR FAMILY MADE A PAYMENT AND PAYMENT IS GREATER THAN \$5.00, GO TO ST78 - EXPPAYBK ( STQ2920 ).  
ELSE GO TO BOX ST80 - (STQ2930 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

234	<b>SPFamilyPayment</b>	SP/Family Payment = For this COST, there is PAYM where (PAYM.PAYMCOST = COST.COSTNUM & PAYM.PAYMTYPE = 1/SPFamily & PAYM.PAYMDFLG^ 1/Yes). SP/family payment = PAYM.PAYMAMT.
-----	------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

## DESIGN NOTES

---



**ST78**

Page Order # : 1250

Design Screen Type: Yes/No

Fields: Field 1: EXPPAYBK

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display: Display SP/Family payment.

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: (ST CLAIM HEADER)  
 EVENT: (CHARGE BUNDLE EVENT)  
 (CHARGE BUNDLE EVENT) (etc.)  
 TOTAL CHARGE = \$(TOTAL CHARGE)

Int. Instr I:

Question Text: I have recorded that [you have/(SP) has] paid \$(SP/FAMILY PAYMENT). Do you expect any source to pay [you/(SP)] back any or all of that amount?

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:** EXPPAYBK ( STQ2920 )

**Cheshire Name:** CORO.EXPPAYBK

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated  
**Type Name:** TYesNoDKRF  
**Answers Allowed:** 1  
**Drop Down List:** No  
**Lookup File:** No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:**  
**Max Value:**  
**Mask:**

Number	Label	Route
1	Yes	BOX ST78A - (STQ2922 )
	<b>English text: YES</b>	
2	No	BOX ST78A - (STQ2922 )
	<b>English text: NO</b>	

Attribute	Route
Don't know	BOX ST78A - (STQ2922 )
Refusal	BOX ST78A - (STQ2922 )

#### BACKGROUND VARIABLE ASSIGNMENTS

#### SOFT EDIT CHECKS

#### HARD EDIT CHECKS

#### TECHNICAL NOTES

**234 SPFamilyPayment** SP/Family Payment =  
 For this COST, there is PAYM where  
 (PAYM.PAYMCOST = COST.COSTNUM &  
 PAYM.PAYMTYPE = 1/SPFamily & PAYM.PAYMDFLG^  
 1/Yes).  
 SP/family payment = PAYM.PAYMAMT.

#### DESIGN NOTES

**BOX ST78A**

Page Order # : 1251

**BOX INSTRUCTIONS**

---

( STQ2922 ) IF ST78 - EXPPAYBK = 1/Yes AND ((CURRENTLY ADMINISTERING CPS AND CHARGES WERE FIRST COLLECTED 2 ROUNDS PREVIOUS TO CURRENT ROUND) OR (SP IS IN THE EXIT SAMPLE)), GO TO ST80 - EXPAYUNT ( STQ2926 ).

ELSE GO TO BOX ST80 - (STQ2930 ).

**ASSIGNMENTS**

---

**TECHNICAL NOTES**

---

<b>16</b>	<b>ExitSample</b>	SP is in the Exit Sample = (MRES.INTTYPE = 8/ExitInterviewHadPrev or 9/ExitInterviewSkipPrev) on MRES where MRES.MRESRND = current round.
<b>271</b>	<b>COST2RoundsOld</b>	Charges first collected 2 rounds previous to current round = COST.COSTRND = (current round - 2).

**DESIGN NOTES**

---

**BOX ST78B**

Page Order # : 1252

**BOX INSTRUCTIONS**

---

( STQ2923 ) IF (CURRENTLY ADMINISTERING CPS AND CHARGES WERE FIRST COLLECTED 2 ROUNDS PREVIOUS TO CURRENT ROUND) OR (SP IS IN THE EXIT SAMPLE), GO TO ST79 - EXPAYOUT ( STQ2924 ).

ELSE GO TO BOX ST80 - (STQ2930 ).

**ASSIGNMENTS**

---

**TECHNICAL NOTES**

---

<b>16</b>	<b>ExitSample</b>	SP is in the Exit Sample = (MRES.INTTYPE = 8/ExitInterviewHadPrev or 9/ExitInterviewSkipPrev) on MRES where MRES.MRESRND = current round.
<b>271</b>	<b>COST2RoundsOld</b>	Charges first collected 2 rounds previous to current round = COST.COSTRNDC = (current round - 2).

**DESIGN NOTES**

---

**ST79**

Page Order # : 1253

Design Screen Type: Yes/No

Fields: Field 1: EXPAYOUT

Enable Functions:	HELP	No
	COMMENTS	No
	JUMPBACK	No

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: (ST CLAIM HEADER)  
 EVENT: (CHARGE BUNDLE EVENT)  
 (CHARGE BUNDLE EVENT) (etc.)  
 TOTAL CHARGE = \$(TOTAL CHARGE)

Int. Instr I:

Question Text: Do you expect anyone to pay any of this amount?

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:** EXPAYOUT ( STQ2924 )

**Cheshire Name:** CORO.EXPAYOUT

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated  
**Type Name:** TYesNoDKRF  
**Answers Allowed:** 1  
**Drop Down List:** No  
**Lookup File:** No  
**Lookup File Name:**

**FieldSize:**  
**Min Value:**  
**Max Value:**  
**Mask:**

Number	Label	Route
1	Yes	ST80 - EXPAYUNT ( STQ2926 )
	<b>English text:</b> YES	
2	No	BOX ST80 - (STQ2930 )
	<b>English text:</b> NO	

Attribute	Route
Don't know	BOX ST80 - (STQ2930 )
Refusal	BOX ST80 - (STQ2930 )

#### BACKGROUND VARIABLE ASSIGNMENTS

---

#### SOFT EDIT CHECKS

---

#### HARD EDIT CHECKS

---

#### TECHNICAL NOTES

---

#### DESIGN NOTES

---

**ST80**

Page Order # : 1258

Design Screen Type: Quantity Unit

Fields:

<b>Field 1:</b>	<b>EXPAYUNT</b>
<b>Field 2:</b>	<b>EXPAYPCT</b>
<b>Field 3:</b>	<b>EXPAYAMT</b>

<b>Enable Functions:</b>	<b>HELP</b>	No
	<b>COMMENTS</b>	No
	<b>JUMPBACK</b>	No

Roster Name:

Roster Type:

<b>Roster Functions:</b>	<b>Add Item</b>	No
	<b>Edit Item</b>	No
	<b>Delete Item</b>	No
	<b>Search Item</b>	No

<b>Grid Functions:</b>	<b>Add Line</b>	No
	<b>Delete Line</b>	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display: Vertical Alignment

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

**Context Header:** (ST CLAIM HEADER)  
 EVENT: (CHARGE BUNDLE EVENT)  
 (CHARGE BUNDLE EVENT) (etc.)  
 TOTAL CHARGE = \$(TOTAL CHARGE)

Int. Instr I:

Question Text: How much do you expect will be paid?

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:**                    **EXPAYUNT**                    ( STQ2926 )

**Cheshire Name:**            CORO.EXPAYUNT

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:**                Enumerated

**Type Name:**                TExpayunt

**Answers Allowed:**        1

**Drop Down List:**        No

**Lookup File:**              No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	Percentage	ST80 - EXPAYPCT ( STQ2927 )
	<b>English text:</b> PERCENTAGE	
2	Dollars	ST80 - EXPAYAMT ( STQ2928 )
	<b>English text:</b> DOLLARS	

Attribute	Route
Don't know	BOX ST80 - (STQ2930 )
Refusal	BOX ST80 - (STQ2930 )



**Field2:** EXPAYPCT ( STQ2927 )

**Cheshire Name:** CORO.EXPAYPCT

**Item Text display:**

**Item Text:**

**Label:** PERCENTAGE:

**Label Position:** Left

**Field Type:** Real

**Type Name:** TExpaypctReal

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:** 0.0

**Max Value:** 100

**Mask:** Percent

Number	Label	Route
1	[Continuous answer.]	BOX ST80 - (STQ2930 )

**Field3:** EXPAYAMT ( STQ2928 )

**Cheshire Name:** CORO.EXPAYPCT

**Item Text display:**

**Item Text:**

**Label:** DOLLARS:

**Label Position:** Left

**Field Type:** Real

**Type Name:** TExpayamt

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:** 0.49

**Max Value:** 999999.99

**Mask:** Dollars

Number	Label	Route
1	[Continuous answer.]	BOX ST80 - (STQ2930 )

#### BACKGROUND VARIABLE ASSIGNMENTS

#### SOFT EDIT CHECKS

Edit #1

## ST80

If ST80 - EXPAYUNT = 1/Percentage, then ST80 - EXPAYPCT should = 20 - 100.  
If not true, display message "PERCENTAGE SEEMS UNLIKELY. PLEASE VERIFY."

Edit #2

If ST80 - EXPAYUNT = 2/Dollars and (SP/Family's payment ^= DK and ^= RF) , then ST80 - EXPAYAMT should <= SP/Family's payment.  
If not true, display message "THE AMOUNT ENTERED IS GREATER THAN THE SP/FAMILY PAYMENT. PLEASE VERIFY."

### **HARD EDIT CHECKS**

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### **TECHNICAL NOTES**

---

### **DESIGN NOTES**

---

# BOX ST80

## BOX INSTRUCTIONS

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( STQ2930 ) IF CURRENTLY ADMINISTERING NS, GO TO BOX NSBEG - ( NSQ1010 ).

ELSE IF CURRENTLY ADMINISTERING CPS, GO TO BOX CPSBEG - ( CPS1010 ).

ELSE IF ST5 - STATTYPE = 8/MPDPBenefit, GO TO ST82 - ASTATEMENT ( STQ2970 ).

ELSE GO TO ST81 - ABUNDLE ( STQ2960 ).

## ASSIGNMENTS

---

**EVERSTMT** Set HRND.EVERSTMT = 1/Yes, indication that at least one charge bundle has been entered in the current round.

## TECHNICAL NOTES

---

### DESIGN NOTES

---

If administering CPS, BOX ST80 routes back to the beginning of CPS to reevaluate which COST BUNDLES still need to be asked about in CPS.

Else if administering NS, BOX ST80 routes back to the beginning of NS to reevaluate which current round EVENTS still need charge bundle data collected.

Else (administering ST), BOX ST80 routes to the ST END LOOP Probe for more statements.

# ST81

Page Order # : 1290

Design Screen Type: Yes/No

Fields: Field 1: ABUNDLE

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header:

Int. Instr I: IS THERE ANOTHER CHARGE BUNDLE TO ENTER FROM THIS (TYPE OF STATEMENT)?

Question Text:

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:** ABUNDLE ( STQ2960 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TYesNo

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	Yes	ST4 - MATCHST ( STQ1110 )
	<b>English text:</b> YES	
2	No	ST82 - ASTATEMENT ( STQ2970 )
	<b>English text:</b> NO	

#### BACKGROUND VARIABLE ASSIGNMENTS

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#### SOFT EDIT CHECKS

---

#### HARD EDIT CHECKS

---

#### TECHNICAL NOTES

---

#### DESIGN NOTES

---

**ST82**

Page Order # : 1300

Design Screen Type: Yes/No

Fields: Field 1: ASTATEMENT

Enable Functions:	HELP	No
	COMMENTS	Yes
	JUMPBACK	Yes

Roster Name:

Roster Type:

Roster Functions:	Add Item	No
	Edit Item	No
	Delete Item	No
	Search Item	No

Grid Functions:	Add Line	No
	Delete Line	No

**DISPLAY INSTRUCTIONS:**

---

Context header display:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: SURVEY REFERENCE PERIOD: (SURVEY REFERENCE DATE)  
TO (TODAY/DATE OF DEATH/DATE OF INSTITUTIONALIZATION)

Int. Instr I: IS THERE ANOTHER MSN, INSURANCE, TRICARE, OR  
MEDICARE PRESCRIPTION DRUG BENEFIT STATEMENT TO  
ENTER?

Question Text:

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:**                    **ASTATEMENT**                    ( STQ2970 )

**Cheshire Name:**            TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:**                Enumerated

**Type Name:**                TYesNo

**Answers Allowed:**        1

**Drop Down List:**        No

**Lookup File:**              No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

Number	Label	Route
1	Yes	ST4 - MATCHST ( STQ1110 )
	<b>English text:</b> YES	
2	No	BOX STEND - (STQ3010 )
	<b>English text:</b> NO	

#### **BACKGROUND VARIABLE ASSIGNMENTS**

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#### **SOFT EDIT CHECKS**

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#### **HARD EDIT CHECKS**

---

#### **TECHNICAL NOTES**

---

#### **DESIGN NOTES**

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# **BOX STEND**

**Page Order # :** 1340

## **BOX INSTRUCTIONS**

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( STQ3010 ) GO TO NEXT SECTION. .

## **ASSIGNMENTS**

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## **TECHNICAL NOTES**

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## **DESIGN NOTES**

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