

**BOX STBEG**

**BOX INSTRUCTIONS**

- ( 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) ST1 - MHMOSTMT ( STQ1030 ).
- ELSE GO TO ST2 - MCSAVAIL ( STQ1080 ).

**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>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).<br>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).<br>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).<br>Exclude Deleted Plans. See T.N. 52.                      |
| <b>381</b> | <b>MHMOAnytimeWithoutRx</b> | SP covered by Medicare Managed Care (Medicare Advantage Plan) without RX during curr. rnd= There is a PLAN where PLANTYPE=5/MHMO & PLRO where (PLROPLAN=PLANNUM & PLRORND=curr.round & COVANYTM=1/Yes & MHMORX ^=1/Yes)).<br>Exclude Deleted Plans. See T.N. 52. |
| <b>362</b> | <b>PrivHMOAnytime</b>       | 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)).<br>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:** 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).

**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:**

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**Context Header:** MAPLAN: (MANAGED CARE PLAN NAME)

**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. |
|----|---------------------|--|

|     |                        |   |
|-----|------------------------|---|
| 65  | <b>MHMOCurrent</b>     | SP has a current Medicare Managed Care plan (Medicare Advantage plan) =<br>There is a PLAN where PLAN.PLANTYPE=5/MHMO & PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM & PLRO.PLRORND=current round & PLRO.COVCURNT=1/Yes).<br>Exclude Deleted Plans. See T.N. 52.        |
| 112 | <b>PlansPrivateHMO</b> | SP is covered by a Private Managed Care Plan during the current round =<br>There is a PLAN where PLAN.PLANTYPE=4/PrivatePlan & PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM & PLRO.PLRORND=current round & PLRO.PPRVHMO=1/Yes).<br>Exclude Deleted Plans. See T.N. 52.  |
| 106 | <b>HIPlanName</b>      | Health Insurance Plan Roster is stored on PLAN.<br>Plan name = PLAN.PLNAME.   |
| 4   | <b>Respondent</b>      | On MRES where MRES.MRESRND = current round:<br><br>A Proxy interview (respondent is a proxy) =<br>MRES.SPPROXY=2/Proxy.<br>MRES.RROSTNUM=ROST.ROSTNUM of respondent.<br><br>An SP interview (respondent is the SP) =<br>MRES.SPPROXY=1/SP.<br>MRES.RROSTNUM='01'. |

**DESIGN NOTES**

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# ST2

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" (MHMO, TRICARE, or Medicare Prescription Drug plan) or there was a (MHMO, TRICARE, or Medicare Prescription Drug plan) "current" at the time of the previous round interview, then display "Please include...".  
Else do not display.

**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 costs were paid by Medicare, any insurance company, or TRICARE.]

[PROBE IF NECESSARY: Do you have any statements or paper from Medicare, insurance, or TRICARE [that [you/(SP)] received since the last interview]? (Please include any statements received about [your/(SP's)] prescription drug benefit.)]

**Int. Instr II:**

**INPUT FIELDS / ROUTING**

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**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 ) |
| English text: YES |       |                           |
| 2                 | No    | BOX STEND - (STQ3010 )    |
| English text: NO  |       |                           |

| Attribute  | Route                  |
|------------|------------------------|
| Don't know | BOX STEND - (STQ3010 ) |
| Refusal    | BOX STEND - (STQ3010 ) |

**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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|            |  |   |
|------------|--|---|
| <b>126</b> | <b>FirstCommunity</b>                        | If this is SP's first community interview =<br>(MRES.INTTYPE=2/NewFromFacility or<br>MRES.INTTYPE=3/NewFromSupplement) on MRES<br>where MRES.MRESRND = current round.   |
| <b>355</b> | <b>TricareCurrent</b>                        | There is a "current" Tricare plan =<br>There is a PLAN where PLAN.PLANTYPE = 6/Tricare &<br>PLRO where (PLRO.PLROPLAN = PLAN.PLANNUM &<br>PLRORND = current round & (PLRO.COVTIME =<br>1/WholeTime or PLRO.COVNOW = 1/Yes)).<br>Exclude Deleted Plans. See T.N. 52.   |
| <b>29</b>  | <b>CurrMedManageCarePlan - Change to 65.</b> | SP currently in Medicare Managed Care Plan (Medicare<br>Advantage 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.  |
| <b>349</b> | <b>ThisMPDPCurrentPrevRound</b>              | This MPDP Plan was "current" at the time of the previous<br>round interview =<br>For this PLAN, there is a PLRO where<br>(PLRO.PLROPLAN=PLAN.PLANNUM &<br>PLRO.PLRORND=previous round &<br>PLRO.COVCURNT=1/Yes).<br>Exclude Deleted Plans. See T.N. 52.   |
| <b>72</b>  | <b>TricareCurrentPrevRound</b>               | Tricare "current" at the time of the previous round<br>interview =<br>There is a PLAN where PLAN.PLANTYPE=6/Tricare &<br>PLRO where (PLROPLAN=PLAN.PLANNUM &<br>PLRORND=previous round and<br>(COVTIME=1/WholeTime or COVNOW=1/Yes)).<br>Exclude Deleted Plans. See T.N. 52.<br>Exclude plans stopped in HIS. See T.N. 476. |
| <b>51</b>  | <b>MHMOCurrPrevRound</b>                     | Medicare Managed Care plan (Medicare Advantage plan)<br>"current" at time of previous round interview =<br>There is a PLAN where PLANTYPE=5/MHMO & PLRO<br>where (PLROPLAN=PLANNUM & PLRORND=previous<br>round & COVCURNT=1/Yes)).<br>Exclude Deleted Plans. See T.N. 52.<br>Exclude plans stopped in HIS. See T.N. 476.    |
| <b>476</b> | <b>HISStoppedPlans</b>                       | Plans stopped in HIS that are not valid for displays or<br>checks =<br>Any PLAN where PLAN.PLANSFLG=1/Yes is a PLAN<br>stopped in HIS.  |

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**DESIGN NOTES**


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**ST2**

**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 =<br>For this PLAN, there is a PLRO where<br>(PLRO.PLROPLAN=PLAN.PLANNUM &<br>PLRO.PLRORND=previous round &<br>(COVTIME=1/WholeTime or COVNOW=1/Yes or<br>COVCURNT=1/Yes)).<br>Exclude Deleted Plans. See T.N. 52. |
| <b>145</b> | <b>PlanCoveredPrevRnd</b> | SP covered by PLAN anytime during prev.round =<br>There is a PLAN where PLAN.PLANTYPE ^= 1/Medicare<br>& PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM &<br>PLRO.PLRORND=prev. round & (PLRO.COVTIME ^=<br>empty or PLRO.COVANYTM=1/Yes)).<br>Exclude Deleted Plans. See T.N. 52. |
| <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.  |

**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 has a "current" (MHMO, TRICARE, or Medicare Prescription Drug plan) or there was a (MHMO, TRICARE, or Medicare Prescription Drug plan) "current" at the time of the previous round interview, then display "SELECT.." for Interviewer Instruction 2.  
Else do not 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:** [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 "MPDP STATEMENT OR MA/TRICARE PRESCRIPTION DRUG BUNDLE" AT THE NEXT SCREEN FOR ALL STATEMENTS FROM THE SP'S "(MPDP)" PLAN, "(MHMO)" PLAN OR TRICARE PLAN THAT REPORTS PRESCRIPTION DRUG CLAIMS.]

**INPUT FIELDS / ROUTING**

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**Field1:** MATCHST ( STQ1110 )

**Cheshire Name:** TEMP

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

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

| Number | Label    | Route                              |
|--------|----------|------------------------------------|
| 1      | Continue | ST5 - ST_CHARGE BUNDLE ( STQ1120 ) |

English text: CONTINUE

| Attribute | Route                              |
|-----------|------------------------------------|
| Empty     | ST5 - ST_CHARGE BUNDLE ( 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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|     |  |   |
|-----|--|---|
| 355 | <b>TricareCurrent</b>                        | There is a "current" Tricare plan =<br>There is a PLAN where PLAN.PLANTYPE = 6/Tricare & PLRO where (PLRO.PLROPLAN = PLAN.PLANNUM & PLRORND = current round & (PLRO.COVTIME = 1/WholeTime or PLRO.COVNOW = 1/Yes)).<br>Exclude Deleted Plans. See T.N. 52.  |
| 29  | <b>CurrMedManageCarePlan - Change to 65.</b> | SP currently in Medicare Managed Care Plan (Medicare Advantage plan) =<br>There is a PLAN where PLAN.PLANTYPE=5/MHMO & PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM & PLRO.PLRORND=current round & PLRO.COVCURNT=1/Yes).<br>Exclude Deleted Plans. See T.N. 52.   |
| 342 | <b>MPDPCurrent</b>                           | SP has a "current" Medicare Prescription Drug plan =<br>There is a PLAN where PLAN.PLANTYPE=7/MPDP & PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM & PLRO.PLRORND=current round & PLRO.COVCURNT=1/Yes).<br>Exclude Deleted Plans. See T.N. 52.   |
| 349 | <b>ThisMPDPCurrentPrevRnd</b>                | This MPDP Plan was "current" at the time of the previous round interview =<br>For this PLAN, there is a PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM & PLRO.PLRORND=previous round & PLRO.COVCURNT=1/Yes).<br>Exclude Deleted Plans. See T.N. 52.   |
| 72  | <b>TricareCurrentPrevRnd</b>                 | Tricare "current" at the time of the previous round interview =<br>There is a PLAN where PLAN.PLANTYPE=6/Tricare & PLRO where (PLROPLAN=PLAN.PLANNUM & PLRORND=previous round and (COVTIME=1/WholeTime or COVNOW=1/Yes)).<br>Exclude Deleted Plans. See T.N. 52.<br>Exclude plans stopped in HIS. See T.N. 476. |
| 51  | <b>MHMOCurrPrevRnd</b>                       | Medicare Managed Care plan (Medicare Advantage plan) "current" at time of previous round interview =<br>There is a PLAN where PLANTYPE=5/MHMO & PLRO where (PLROPLAN=PLANNUM & PLRORND=previous round & COVCURNT=1/Yes)).<br>Exclude Deleted Plans. See T.N. 52.<br>Exclude plans stopped in HIS. See T.N. 476. |
| 476 | <b>HISStoppedPlans</b>                       | Plans stopped in HIS that are not valid for displays or checks =<br>Any PLAN where PLAN.PLANSFLG=1/Yes is a PLAN stopped in HIS.  |

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**DESIGN NOTES**

**ST5**

Page Order # : 120

Design Screen Type: Roster

Fields: Field 1: ST\_CHARGE BUNDLE

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

Roster Name: Statement Charge Bundle

Roster Type: Single Item Select

Roster Functions:      **Add Item**                  Yes                  Display as ' Add Charge Bundle '  
                                  **Edit Item**                      Yes                  Display as ' Edit Charge Bundle '  
                                  **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:** 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.STTYPE response text. |

**ST5**

|   |                 |   |
|---|-----------------|---|
| 3 | MSN Claim Type  | Display COST.MCARTYPE response text.  |
| 4 | Claim Control # | Display "Claim Control #" above columns 4,5,6.  |
|   | MSN             | If (COSA.MSNCLNUM ^= empty and COSA.MSNCLNUM ^= DK), display first five digits of COSA.MSNCLNUM.<br>Else if COSA.MSNCLNUM = DK, display "DK".<br>Else do not display. |
| 5 | INS             | If (COST.INSCLNUM ^= empty and COST.INSCLNUM ^= DK), display first five digits of COST.INSCLNUM.<br>Else if COST.INSCLNUM = DK, display "DK".<br>Else do not display. |
| 6 | TRI             | If (COST.TRICLNUM ^= empty and COST.TRICLNUM ^= DK), display first five digits of COST.TRICLNUM.<br>Else if COST.TRICLNUM = DK, display "DK".<br>Else do not display. |
| 7 | RX 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**

---

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

**Cheshire Name:** TEMP

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

**Item Text:**

**Label:**

**Label Position:**

|                          |              |                   |     |
|--------------------------|--------------|-------------------|-----|
| <b>Field Type:</b>       | String       | <b>FieldSize:</b> | 135 |
| <b>Type Name:</b>        | TCOSTPICK135 | <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 ST5A - (STQ1121 ) |

**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.STTYPE   | Statement Type Reported at ST5. |
| COST.MCARTYPE | MSN Type                        |
| CORO.COROCOST | Charge Bundle COST number       |
| CORO.CORORND  | Current Round                   |
| CORO.COROTYPE | 1/ST                            |
| BASE.LASTCOST | Highest COST.COSTNUM.           |

NOTE: COST.STATTYPE is set at BOX ST5B based on ST5 - COST.STTYPE and ST5A - COST.PDPTYPE.

**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>250</b> | <b>CurrentChargeBundles</b> | Current Round Charge Bundles entered in Statement<br>Series =<br>There is a COST where COST.COSTRNDC = current<br>round and COST.COSTTYPE = 1/ST.  |
| <b>261</b> | <b>NeverInsurancePlan</b>   | SP never had a health insurance plan other than<br>Medicare or Tricare =<br>There is no PLAN where (PLAN.PLANTYPE =<br>2/Medicaid, 3/PublicPlan, or 4/PrivatePlan).<br>Exclude Deleted Plans. See T.N. 52. |
| <b>262</b> | <b>NeverTricare</b>         | SP never had a Tricare plan =<br>There is no PLAN where PLAN.PLANTYPE = 6/Tricare.<br>Exclude Deleted Plans. See T.N. 52.  |
| <b>468</b> | <b>TypeOfStatement</b>      | Type of Statement = COST.STATTYPE.   |

**DESIGN NOTES**

---

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

# BOX ST5A

Page Order # : 130

## BOX INSTRUCTIONS

---

( STQ1121 ) IF ST5 – STTYPE = 8/MPDPorMAorTricare THEN GO TO ST5A - PDPTYPE ( STQ1122 ).  
ELSE GO TO BOX ST5B - (STQ1123 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

## DESIGN NOTES

---

# ST5A

Page Order # : 135

Design Screen Type: Code 1

Fields: Field 1: PDPTYPE

|                   |          |     |
|-------------------|----------|-----|
| 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:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header:

Int. Instr I: SELECT THE TYPE OF PRESCRIPTION DRUG STATEMENT FOR THIS BUNDLE.

Question Text:

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

**Field1:** PDPTYPE ( STQ1122 )

**Cheshire Name:** COST.PDPTYPE

**Item Text display:**

**Item Text:**

**Label:**

**Label Position:**

**Field Type:** Enumerated

**Type Name:** TPDPTYPE

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:**

**Max Value:**

**Mask:**

| Number | Label   | Route                 |
|--------|---|-----------------------|
| 1      | MPDP  | BOX ST5B - (STQ1123 ) |
|        | <b>English text:</b> MEDICARE PRESCRIPTION DRUG BENEFIT STATEMENT |                       |
| 2      | MedAdvantage  | BOX ST5B - (STQ1123 ) |
|        | <b>English text:</b> MEDICARE ADVANTAGE STATEMENT                 |                       |
| 3      | Tricare   | BOX ST5B - (STQ1123 ) |
|        | <b>English text:</b> TRICARE STATEMENT                            |                       |

#### BACKGROUND VARIABLE ASSIGNMENTS

---

#### SOFT EDIT CHECKS

---

#### HARD EDIT CHECKS

---

#### TECHNICAL NOTES

---

#### DESIGN NOTES

---



**BOX ST5B**

Page Order # : 138

**BOX INSTRUCTIONS**

---

( STQ1123 )      SET STATEMENT TYPE .  
                     GO TO BOX ST5 - (STQ1125 ).

**ASSIGNMENTS**

---

**STATTYPE**            If ST5A-PDPTYPE asked in the current round and  
 (ST5-STTYPE = 8/MPDPorMAorTricare and (ST5A-  
 PDPTYPE = 1/MPDP or 2/MedAdvantage))), set  
 COST.STATTYPE = 8/MPDPBenefit.

                    Else if ST5A-PDPTYPE asked in the current round  
 and (ST5-STTYPE = 8/MPDPorMAorTricare and  
 ST5A- PDPTYPE = 3/Tricare), set COST.STATTYPE  
 = 4/Tricare.

                    Else if ST5-STTYPE = 1/Medicare, set  
 COST.STATTYPE = 1/Medicare.

                    Else if ST5-STTYPE = 2/Insurance, set  
 COST.STATTYPE = 2/Insurance.

                    Else if ST5-STTYPE = 3/MedicareAndInsurance, set  
 COST.STATTYPE = 3/MedicareAndInsurance.

                    Else if ST5-STTYPE = 4/Tricare, set  
 COST.STATTYPE = 4/Tricare.

                    Else if ST5-STTYPE = 5/MedicareAndTricare, set  
 COST.STATTYPE = 5/MedicareAndTricare.

                    Else if ST5-STTYPE = 6/TricareAndInsurance, set  
 COST.STATTYPE = 6/TricareAndInsurance.

                    Else if ST5-STTYPE =  
 7/MedicareAndTricareAndInsurance, set  
 COST.STATTYPE =  
 7/MedicareAndTricareAndInsurance.

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

# BOX ST5

## BOX INSTRUCTIONS

---

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

ELSE IF TYPE OF STATEMENT = 2/Insurance OR 6/TricareAndInsurance, GO TO ST10 - INSCLNUM ( STQ1330 ).

ELSE IF TYPE OF STATEMENT = 4/Tricare AND ST5 - STTYPE = 4/Tricare, GO TO ST11 - TRICLNUM ( STQ1350 ).

ELSE GO TO ST11B - PDPBEGMM ( STQ1354 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

468      **TypeOfStatement**      Type of Statement = COST.STATTYPE.

## DESIGN NOTES

---

BOX ST5 routes all statements where ST5 - STTYPE = 8/MPDPorMAorTricare to ST11B, including charge bundles where COST.STATTYPE = 4/Tricare.

**ST7**

Page Order # : 150

Design Screen Type: Text

Fields:

|                 |                 |
|-----------------|-----------------|
| <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:**

---

**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:**

---

**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**

---

**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 ) |                            |

**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**

Page Order # : 180

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**

---



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 TYPE OF STATEMENT = 3/MedicareAndInsurance OR  
7/MedicareAndTricareAndInsurance, GO TO ST10 - INCLNUM ( STQ1330 ).

ELSE IF TYPE OF STATEMENT = 5/MedicareAndTricare, GO TO ST11 -  
TRICLNUM ( STQ1350 ).

ELSE GO TO ST12 - INCTYPE ( STQ1390 ).

## **ASSIGNMENTS**

---

## **TECHNICAL NOTES**

---

**468**      **TypeOfStatement**      Type of Statement = COST.STATTYPE.

## **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**

---



# BOX ST10

Page Order # : 240

## BOX INSTRUCTIONS

---

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

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

468      **TypeOfStatement**      Type of Statement = COST.STATTYPE.

## 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

|         |          |          |
|---------|----------|----------|
| Fields: | Field 1: | PDPBEGMM |
|         | Field 2: | PDPBEGDD |
|         | Field 3: | PDPBEGYY |
|         | Field 4: | PDPENDMM |
|         | Field 5: | PDPENDDD |
|         | Field 6: | PDPENDYY |

|                   |          |     |
|-------------------|----------|-----|
| 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:

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: -----



**ST11B**

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

**Int. Instr I:** ENTER THE BEGINNING AND ENDING DATES OF SERVICE  
FROM THE 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:**

| <b>Number</b> | <b>Label</b>         | <b>Route</b>                 |
|---------------|----------------------|------------------------------|
| 1             | [Continuous answer.] | ST11B - PDPBEGDD ( STQ1356 ) |

---

| <b>Attribute</b> | <b>Route</b>                 |
|------------------|------------------------------|
| 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 ((TYPE OF STATEMENT = 8/MPDPBenefit) or (TYPE OF STATEMENT = 4/Tricare and ST5 - STTYPE = 8/MPDPorMAorTRICARE)), 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 ((TYPE OF STATEMENT = 8/MPDPBenefit) or (TYPE OF

## ST12

STATEMENT = 4/Tricare and ST5 - STTYPE = 8/MPDPorMAorTRICARE)), response to ST12 - INCTYPE should not include 2/HHVisits.

If not true, display message "PLEASE VERIFY THAT HOME HEALTH VISITS ARE INCLUDED IN CHARGE BUNDLE."

Edit # 3:

If ((TYPE OF STATEMENT = 8/MPDPBenefit) or (TYPE OF STATEMENT = 4/Tricare and ST5 - STTYPE = 8/MPDPorMAorTRICARE)), 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

---

**468**      **TypeOfStatement**      Type of Statement = COST.STATTYPE.

### DESIGN NOTES

---

# **BOX ST12**

**Page Order # : 300**

## **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 alphabetical order by PROV.PROVNAME.

| Roster/Grid display: | COL # | HEADER                         | INSTRUCTIONS           |
|----------------------|-------|--------------------------------|------------------------|
|                      | 1     | Provider Name                  | Display PROV.PROVNAME. |
|                      | 2     | Billing/Group<br>Practice Name | Display PROV.GROUPNAM. |

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:**

**Field Type:** String  
**Type Name:** TProvPick135  
**Answers Allowed:** 1  
**Drop Down List:** No  
**Lookup File:** No  
**Lookup File Name:**

**FieldSize:** 135  
**Min Value:**  
**Max Value:**  
**Mask:**

| 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

See additional instructions below.

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

**PRVROSTR** If Provider added, set PROV.PRVROSTR = 15/STProviderServiceDates.

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

---

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, (PROVIDER NAME), 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, (PROVIDER NAME), 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.

| <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. |

**ST15**

|          |          |   |
|----------|----------|---|
| <b>4</b> | Status   | If EVNT.EVNTTYPE = 'IP' and<br>EVNT.IPSTATUS = 1/StillInHospital,<br>display "ON".<br>Else if EVNT.VISTTYPE = 2/RepeatVisit,<br>display "RV".<br>Else do not display. |
| <b>5</b> | # Visits | If EVNT.VISTTYPE = 2/RepeatVisit,<br>display EVNT.RVTIMES.<br>Else do not display.  |
| <b>6</b> | Round    | Display 'R' + EVNT.EVNTRNDC. EX:<br>R45   |
| <b>7</b> |          | If Event Date is out of the Survey<br>Reference Period, display "ORP".<br>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 =<br>MRES.SPALIVE=1/Alive or empty  |
|     |                 | SP is Alive =<br>MRES.SPALIVE=1/Alive, 2/AliveAndInstitute, or EMPTY  |
|     |                 | SP is Institutionalized =<br>MRES.SPALIVE=2/AliveAndInstitute   |
|     |                 | SP is Deceased =<br>MRES.SPALIVE=3/Deceased.  |
| 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. |

#### 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: | <b>HELP</b>     | No  |
|                   | <b>COMMENTS</b> | Yes |
|                   | <b>JUMPBACK</b> | Yes |

Roster Name: Statement Event Roster

Roster Type: Multiple Item Select

|                   |                    |     |                                |
|-------------------|--------------------|-----|--------------------------------|
| Roster Functions: | <b>Add Item</b>    | Yes | Display as ' Add Event Date '  |
|                   | <b>Edit Item</b>   | Yes | Display as ' Edit Event Date ' |
|                   | <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: Display name of Provider, (PROVIDER NAME), 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.

| 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.<br>Else do not display. |

**ST16**

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

**Field Type:** String **FieldSize:** 135  
**Type Name:** TSTEventPick135 **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 ST16A - (STQ1450 ) |

#### 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.LASTEVTNT

**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.

**EVCHGLOC** If Event added, set EVNT.EVCHGLOC = 'ST'.

#### 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 =<br>MRES.SPALIVE=1/Alive or empty   |
|     |                 | SP is Alive =<br>MRES.SPALIVE=1/Alive, 2/AliveAndInstitute, or EMPTY   |
|     |                 | SP is Institutionalized =<br>MRES.SPALIVE=2/AliveAndInstitute  |
|     |                 | SP is Deceased =<br>MRES.SPALIVE=3/Deceased.   |
| 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 determining ORP events. |

#### DESIGN NOTES

---

Interviewer can only add events at this roster.

# BOX ST16A

Page Order # : 370

## BOX INSTRUCTIONS

---

( STQ1450 ) IF AT LEAST ONE EVENT DATE ADDED AT ST16 IS NOT OUTSIDE THE SURVEY REFERENCE PERIOD, GO TO BOX ST16B - (STQ1555 ).  
  
ELSE GO TO ST14 - STDATEUPD ( STQ1412 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

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

## DESIGN NOTES

---

# BOX ST16B

Page Order # : 375

## BOX INSTRUCTIONS

---

( STQ1555 ) IF AT LEAST ONE EVENT ADDED AT ST16 IS A 'DU', 'IP', 'OP', OR 'MP' EVENT TYPE, GO TO ST17 - STDATEINTRO ( STQ1560 ).  
  
ELSE GO TO BOX ST17 - (STQ1570 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

|     |             |                                   |
|-----|-------------|-----------------------------------|
| 241 | TypeOfEvent | Type of Event =<br>EVNT.EVNTTYPE. |
|-----|-------------|-----------------------------------|

## DESIGN NOTES

---

We do not display ST17 Introduction if EVNT.EVNTTYPE = 'ER', 'IU', 'SD', or 'SL' since we do not collect event details for these types of events.

**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**

Page Order # : 390

**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 =<br>PROV.PROVSPEC ^= EMPTY. |
|     |                              | Provider Specialty has not been collected =<br>PROV.PROVSPEC = EMPTY.      |
| 241 | <b>TypeOfEvent</b>           | Type of Event =<br>EVNT.EVNTTYPE.  |

**DESIGN NOTES**

---

We do not collect ST18 - PROVSPEC if EVNT.EVNTTYPE = 'ER', 'IP', 'OP', 'IU', 'SD', or 'SL'.



**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: Display name of Provider, (PROVIDER NAME), selected at ST13.

Question display: Display name of Provider, (PROVIDER NAME), selected at ST13.

Multi Field display: Vertical Alignment

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: PROVIDER NAME: (PROVIDER NAME)

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

**FieldSize:**

**Type Name:** TProvspec

**Min Value:**

**Answers Allowed:** 1

**Max Value:**

**Drop Down List:** No

**Mask:**

**Lookup File:** No

**Lookup File Name:**

| 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**

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- ( STQ1620 ) IF (AT LEAST ONE EVENT ADDED AT ST16 IS A 'DU', 'ER', 'IP', 'OP', 'IU', OR 'MP' EVENT TYPE) AND (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**

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**TECHNICAL NOTES**

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- |            |                              |  |
|------------|------------------------------|--|
| <b>423</b> | <b>SPReceivedCaretThruVA</b> | SP reported receiving health care services through V.A.in the current or any previous round =<br>There is an HRND where HRND.HRNRND = current round and HRND.VACOVER = 1/Yes.<br>HRND.VACOVER is set at BOX HI20 or collected at HI36. |
| <b>127</b> | <b>ProviderVAUnknown</b>     | If Provider is associated with V.A. is unknown =<br>PROV.VAPLACE = empty.  |
| <b>241</b> | <b>TypeOfEvent</b>           | Type of Event =<br>EVNT.EVNTTYPE.  |

**DESIGN NOTES**

---

We do not collect ST19 - VAPLACE if EVNT.EVNTTYPE = 'SD' or 'SL'.

**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: Display name of Provider, (PROVIDER NAME), selected at ST13.

Question display: Display name of Provider, (PROVIDER NAME), selected at ST13.

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: PROVIDER NAME: (PROVIDER NAME)

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 (AT LEAST ONE EVENT ADDED AT ST16 IS A 'DU', 'ER', 'IP', 'OP', OR 'MP' EVENT TYPE) AND (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 (AT LEAST ONE EVENT ADDED AT ST16 IS A 'DU', 'ER', 'IP', 'OP', OR 'MP' EVENT TYPE) AND (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 ST20-HMOASSOC or ST21-HMOREFER if EVNT.EVNTTYPE = 'IU', 'SD' or 'SL'.

**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: Display name of Provider, (PROVIDER NAME), selected at ST13.

Question display: Display name of Provider, (PROVIDER NAME), 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: PROVIDER NAME: (PROVIDER NAME)

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:</b> YES |                                  |
| 2      | No                       | ST21 - HMOREFER ( STQ1670 )      |
|        | <b>English text:</b> NO  |                                  |

| 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 =<br>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 =<br>There is a PLAN where PLAN.PLANTYPE=2/Medicaid & PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM & PLRO.PLRORND=current round & PLRO.MCAIDHMO=1/Yes).<br>Exclude Deleted Plans. See T.N. 52.  |
| 111 | <b>PlanIsMCareHMO</b>   | SP is covered by a Medicare Managed Care Plan (Medicare Advantage plan) during the current round =<br>There is a PLAN where PLANTYPE=5/MHMO & PLRO where (PLROPLAN=PLANNUM & PLRORND=current round & COVANYTM=1/Yes).<br>Exclude Deleted Plans. See T.N. 52.     |
| 112 | <b>PlanIsPrivateHMO</b> | SP is covered by a Private Managed Care Plan during the current round =<br>There is a PLAN where PLAN.PLANTYPE=4/PrivatePlan & PLRO where (PLRO.PLROPLAN=PLAN.PLANNUM & PLRO.PLRORND=current round & PLRO.PPRVHMO=1/Yes).<br>Exclude Deleted Plans. See T.N. 52. |
| 106 | <b>HIPlanName</b>       | Health Insurance Plan Roster is stored on PLAN.<br>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:** Display name of Provider, (PROVIDER NAME), selected at ST13.

**Question display:** Display name of Provider, (PROVIDER NAME), 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:** PROVIDER NAME: (PROVIDER NAME)

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_IN - NAVIGATOR ( STQ1675 ) |
|        | <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 =<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>2</b>   | <b>ManagedCarePlan</b>  | SP covered by a Managed Care Plan anytime during<br>current round =<br>There is a PLRO.PLROPLAN=PLAN.PLANUM &<br>PLRO.PLRORND=current round &<br>((PLRO.PPRVHMO=1/Yes) or (PLAN.PLANTYPE =<br>5/MHMO & PLRO.COVANYTM=1/Yes) or<br>(PLRO.MCAIDHMO=1/Yes)). See T.N. 52.      |
| <b>107</b> | <b>PlanIsMCaidHMO</b>   | SP is covered by a Medicaid Managed Care Plan during<br>the current round =<br>There is a PLAN where PLAN.PLANTYPE=2/Medicaid &<br>PLRO where (PLRO.PLROPLAN=PLAN.PLANUM &<br>PLRO.PLRORND=current round &<br>PLRO.MCAIDHMO=1/Yes).<br>Exclude Deleted Plans. See T.N. 52.  |
| <b>111</b> | <b>PlanIsMCareHMO</b>   | SP is covered by a Medicare Managed Care Plan<br>(Medicare Advantage plan) during the current round =<br>There is a PLAN where PLANTYPE=5/MHMO & PLRO<br>where (PLROPLAN=PLANUM & PLRORND=current<br>round & COVANYTM=1/Yes).<br>Exclude Deleted Plans. See T.N. 52.        |
| <b>112</b> | <b>PlanIsPrivateHMO</b> | SP is covered by a Private Managed Care Plan during<br>the current round =<br>There is a PLAN where PLAN.PLANTYPE=4/PrivatePlan<br>& PLRO where (PLRO.PLROPLAN=PLAN.PLANUM &<br>PLRO.PLRORND=current round &<br>PLRO.PPRVHMO=1/Yes).<br>Exclude Deleted Plans. See T.N. 52. |
| <b>106</b> | <b>HIPlanName</b>       | Health Insurance Plan Roster is stored on PLAN.<br>Plan name = PLAN.PLNAME.   |

**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 IP, OP, MP events added at ST16.

In addition, display all other events added for this provider in the current round as "DONE".

Display all DU, ER, 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:**





**BOX ST22A**

Page Order # : 490

**BOX INSTRUCTIONS**

---

( STQ1680 ) FOR THIS EVENT ADDED AT ST16,  
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**

---

|     |             |                                   |
|-----|-------------|-----------------------------------|
| 241 | TypeOfEvent | Type of Event =<br>EVNT.EVNTTYPE. |
|-----|-------------|-----------------------------------|

**DESIGN NOTES**

---

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

MP events are handled by BOX ST23A.

DU, ER, IU, SD, SL events do not collect event details.

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 - MPDVIS ( STQ1691 ).

ELSE GO TO BOX ST23A - (STQ1695 ).

**ASSIGNMENTS**

---

**TECHNICAL NOTES**

---

|     |                              |  |
|-----|------------------------------|--|
| 171 | <b>ProviderMedicalDoctor</b> | Provider Specialty is a Medical Doctor =<br>PROV.PROVSPEC=2/MedicalDoctor  |
| 350 | <b>OverlapERIPOPStay</b>     | Event date overlaps an existing IP stay or Event date matches an existing ER or OP event date =<br>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:** EVENT MONTH = Display Month of the MP event added at ST16.  
 Display name of medical provider, (PROVIDER NAME), 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, (PROVIDER NAME), 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 =  
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:**           EVENT MONTH: (EVENT MONTH)  
                                  PROVIDER NAME: (PROVIDER NAME)

**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:** MPSPDVIS ( 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 ) |
|        | <b>English text:</b> YES |                        |
| 2      | No                       | BOX ST23A - (STQ1695 ) |
|        | <b>English text:</b> 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

**ST23**

# 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, (PROVIDER NAME), 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<br>EVNT.IPSTATUS = 1/StillInHospital,<br>display "ON".<br>Else if EVNT.VISTTYPE = 2/RepeatVisit,<br>display "RV".<br>Else do not display. |
| <b>5</b> | # Visits | If EVNT.VISTTYPE = 2/RepeatVisit,<br>display EVNT.RVTIMES.<br>Else do not display.  |
| <b>6</b> | Round    | Display 'R' + EVNT.EVNTRNDC. EX:<br>R45   |
| <b>7</b> |          | If Event Date is out of the Survey<br>Reference Period, display "ORP".<br>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.DEVNTNUM = 1/Yes, update XCEV.DEVNTNUM = empty. |

#### **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**

---

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 - STDATEMTCH ( 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, (PROVIDER NAME), 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

Page Order # : 519

## BOX INSTRUCTIONS

---

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

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

|     |                  |   |
|-----|------------------|---|
| 135 | RepeatVisitEvent | 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<br><b>English text:</b> YES  | BOX ST26 - (STQ1720 )              |
| 2      | NoAddDate<br><b>English text:</b> NO, NEED TO ADD A PROVIDER EVENT       | ST13 - PROVIDER_STDATE ( STQ1410 ) |
| 3      | NoDeleteDate<br><b>English text:</b> NO, NEED TO REMOVE A PROVIDER EVENT | ST26 - EVENT_STDATEDEL ( STQ1715 ) |

#### 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:** If more than one provider linked to charge bundle, display the name of the most recent provider, (PROVIDER NAME), linked to charge bundle.

**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 Name of Provider, PROV.PROVNAME, for each Provider Service event.

Display in order of entry.

| <b>Roster/Grid display:</b> | <b>COL #</b> | <b>HEADER</b> | <b>INSTRUCTIONS</b>                                       |
|-----------------------------|--------------|---------------|---|
|                             | 1            | Type          | Display EVNT.EVNTTYPE.                                    |
|                             | 2            | Provider Name | Display PROV.PROVNAME where PROV.PROVNUM = EVNT.EVNTPROV. |

**ST26**

|   |            |   |
|---|------------|---|
| 3 | Start Date | Display EVENT DATE in "Mon DD YYYY" format.   |
| 4 | 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.                   |
| 5 | Status     | If EVNT.EVNTTYPE = 'IP' and EVNT.IPSTATUS = 1/StillInHospital, display "ON". Else if EVNT.VISTTYPE = 2/RepeatVisit, display "RV". Else do not display.                            |
| 6 | # Visits   | If EVNT.VISTTYPE = 2/RepeatVisit, display XCEV.RVLINKS on XCEV where XCEV.XCEVEVNT=this EVNT.EVENTNUM and XCEV.XCEVCOST=COST.COSTNUM for this charge bundle. Else do not display. |
| 7 | Round      | Display 'R' + EVNT.EVNTRNDC. EX: R45  |
| 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)  
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 - STDATMTCH (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

**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**

---

DISABLE PREVIOUS PAGE.

# **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: HELP No  
 COMMENTS Yes  
 JUMPBACK Yes

Roster Name: Home Health Provider Roster

Roster Type: Single Item Select

Roster Functions: Add Item Yes Display as ' Add a Provider '  
 Edit Item Yes Display as ' Edit a Provider '  
 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 Providers except for Providers where  
 PROV.PROVNUM=01 and 02, which are reserved for PM and OM  
 events.

Display in alphabetical order by PROV.PROVNAME.

| Roster/Grid display: | COL # | HEADER           | INSTRUCTIONS  |
|----------------------|-------|------------------|---|
|                      | 1     | Provider Name    | Display Provider Name,<br>PROV.PROVNAME   |
|                      | 2     | SubProvider Name | If PROV.SUBPROV ^= empty, display<br>SubProvider name,<br>PROV.SUBPROV.<br>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)

**ST27**

**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 Home Health Provider Roster, see HOME HEALTH PROVIDER ROSTER POP-UP specifications for pop-up window programming instructions.

Variables populated in Home Health Provider Roster Pop-Up Window:

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

See additional instructions below.

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

**PRVROSTR** If Provider added, set PROV.PRVROSTR = 16/STHomeHealthProvider.

**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, (PROVIDER NAME), 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)  
 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

**Type Name:** TMonthInt

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:** 2

**Min Value:** 01

**Max Value:** 12

**Mask:**

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

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

|         |                             |
|---------|-----------------------------|
| Refusal | ST28 - COSTBEGD ( STQ1731 ) |
|---------|-----------------------------|

**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 =<br/>MRES.SPALIVE=1/Alive or empty</p> <p>SP is Alive =<br/>MRES.SPALIVE=1/Alive, 2/AliveAndInstitute, or EMPTY</p> <p>SP is Institutionalized =<br/>MRES.SPALIVE=2/AliveAndInstitute</p> <p>SP is Deceased =<br/>MRES.SPALIVE=3/Deceased.</p> |
| <b>246</b> | <b>ORPEvent</b> | <p>Existing Event Date is outside survey reference period =<br/>EVNT.EVORPFLAG = 1/ORP.</p> <p>New event is Out of the Survey Reference Period =<br/>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 =<br>For this PROV, there is no EVNT where<br>(EVNT.EVNTPROV=PROV.PROVNUM &<br>(EVNT.EVNTTYPE = 'HP' or 'HF') & EVNT.EVNTDFLG<br>^= 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, (PROVIDER NAME), 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:

**XCEVCOST** Create XCEV where XCEV.XCEVCOST = this  
COST.COSTNUM.

**XCEVEVNT** Create XCEV where XCEV.XCEVEVNT =  
EVNT.EVNTNUM where EVNT.EVNTPROV =  
PROV.PROVNUM for Home Health Provider  
currently being asked about.

**XCEVRNDC** Set XCEV.XCEVRNDC = current round.

**DELLINK** If XCEV exists and XCEV.DELLINK = 1/Yes, update  
XCEV.DELLINK = 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**

**Page Order # : 585**

## **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 =

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 OM 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 | INSTRUCTIONS   |
|----------------------|-------|--------|--|
|                      | 1     |        | If EVNT.RENTPROB=2/Rent and ((EVNT.RENT2BUY ^= 2/PurchasedRentToBuy) or (EVNT.RENT2BUY = EMPTY)), display "R".<br>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.<br>Else display EVNT.STOMTYPE response text.  |
| 3 | Purchase or Repair/Rental | 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.<br>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.<br>Else do not display.  |
| 5 | Status                    | If EVNT.OMSTATUS = 1/AlterationNotComplete, display "ON".<br>Else if EVNT.RENTSTIL = 1/Yes, display "RR".<br>Else if EVNT.RENT2BUY = 2/PurchasedRentToBuy, display "OW".<br>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<br>Else do not display.  |
| 7 |                           | If Event Date is out of the Survey Reference Period, display "ORP".<br>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

---

|            |                 |  |
|------------|-----------------|--|
| <b>59</b>  | <b>SPStatus</b> | <p>SP is Alive and not institutionalized =<br/>MRES.SPALIVE=1/Alive or empty</p> <p>SP is Alive =<br/>MRES.SPALIVE=1/Alive, 2/AliveAndInstitute, or EMPTY</p> <p>SP is Institutionalized =<br/>MRES.SPALIVE=2/AliveAndInstitute</p> <p>SP is Deceased =<br/>MRES.SPALIVE=3/Deceased.</p> |
| <b>246</b> | <b>ORPEvent</b> | <p>Existing Event Date is outside survey reference period =<br/>EVNT.EVORPFLAG = 1/ORP.</p> <p>New event is Out of the Survey Reference Period =<br/>See general specifications for Date check logic for determining 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<br><b>English text:</b> GLASSES/CONTACTS                | OM2 - EVENT_OMEYEG ( OMQ1030 )  |
| 2      | Hearing<br><b>English text:</b> HEARING/SPEECH DEVICE           | OM4 - EVENT_OMHEAR ( OMQ1110 )  |
| 3      | Orthopedic<br><b>English text:</b> ORTHOPEDIC ITEM              | OM6 - ORTHTYPE ( OMQ1220 )      |
| 4      | DiabeticSupplies<br><b>English text:</b> DIABETIC SUPPLIES      | OM10 - EVENT_OMDIAB ( OMQ1570 ) |
| 5      | Ambulance<br><b>English text:</b> AMBULANCE/RESCUE              | OM12 - EVENT_OMAMBL ( OMQ1640 ) |
| 6      | Prothesis<br><b>English text:</b> PROSTHESIS                    | OM14 - EVENT_OMPROS ( OMQ1710 ) |
| 7      | Alteration<br><b>English text:</b> ALTERATIONS (HOME/CAR)       | OM29 - ALTRTYPE ( OMQ3040 )     |
| 8      | Oxygen<br><b>English text:</b> OXYGEN                           | OM19A - OXGNTYPE ( OMQ1830 )    |
| 9      | KidneyDialysis<br><b>English text:</b> KIDNEY DIALYSIS          | OM21A - KDNYTYPE ( OMQ2240 )    |
| 10     | OtherMedical<br><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     | Type     | Display EVNT.EVNTTYPE.  |
|                      | 2     |          | If EVNT.RENTPROB=2/Rent and ((EVNT.RENT2BUY ^= 2/PurchasedRentToBuy) or (EVNT.RENT2BUY = EMPTY)), display "R".<br>Else do not display.                                |
|                      | 3     | OME Type | If EVNT.STOMTYPE = 91/Other, display Other Specify Text, EVOS.EVOSTEXT, on EVOS where EVOS.EVOSEVNT = this EVNT.EVNTNUM.<br>Else display EVNT.STOMTYPE response text. |

**ST37**

|   |                           |   |
|---|---------------------------|---|
| 4 | Purchase or Repair/Rental | 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. |
| 5 | 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.  |
| 6 | 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.   |
| 7 | 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.  |
| 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 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. |
|------------|-----------------|--|



**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

## 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

---

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

## DESIGN NOTES

---

**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

**Type Name:**            TMonthcov

**Answers Allowed:**      1

**Drop Down List:**      No

**Lookup File:**            No

**Lookup File Name:**

**FieldSize:**

**Min Value:**            1

**Max Value:**            72

**Mask:**

| 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

---

## TECHNICAL NOTES

---

|     |          |   |
|-----|----------|---|
| 242 | OMRental | Other Medical Expense Item is Rented =<br>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 =<br>EVNT.OTHRTYPE = 5/OstomySupplies,<br>6/IncontinenceSupplies, or 7/Bandages. |
|------------|--------------------|--|

## DESIGN NOTES

---



# 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

**Type Name:** TNumlinks

**Answers Allowed:** 1

**Drop Down List:** No

**Lookup File:** No

**Lookup File Name:**

**FieldSize:**

**Min Value:** 1

**Max Value:** 100

**Mask:**

| 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 =<br>EVNT.OTHRTYPE = 5/OstomySupplies,<br>6/IncontinenceSupplies, or 7/Bandages. |
|------------|--------------------|--|

## 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.EVNTNUM and XCEV.XCEVCOST = the COST.COSTNUM for this charge bundle.

Else do not display.

Column 8, header = # Purchases

If (EVNT.EVNTYPE = 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 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.

| Roster/Grid display: | COL # | HEADER | INSTRUCTIONS   |
|----------------------|-------|--------|--|
|                      | 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.<br>Else display EVNT.STOMTYPE response text.  |
| 3 | Purchase or Repair/Rental | 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.<br>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.<br>Else do not display.  |
| 5 | Status                    | If EVNT.OMSTATUS = 1/AlterationNotComplete, display "ON".<br>Else if EVNT.RENTSTIL = 1/Yes, display "RR".<br>Else if EVNT.RENT2BUY = 2/PurchasedRentToBuy, display "OW".<br>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.<br>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.EVNTRNDC. EX: R45<br>Else do not display.   |
| 8 |                           | If Event Date is out of the Survey Reference Period, display "ORP".<br>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:**

|                          |              |                   |     |
|--------------------------|--------------|-------------------|-----|
| <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.] | 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**

---

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**

---

DISABLE PREVIOUS PAGE.

# **BOX ST40**

**Page Order # :** 640

## **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 Name | 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:**

|                          |              |                   |     |
|--------------------------|--------------|-------------------|-----|
| <b>Field Type:</b>       | String       | <b>FieldSize:</b> | 200 |
| <b>Type Name:</b>        | TEvntPick200 | <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.] | 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.LASTEVT  | 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.                                 |
| <b>EVCHGLOC</b> | If Event added, set EVNT.EVCHGLOC = 'ST'.   |

### 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:**

|                          |           |                   |     |
|--------------------------|-----------|-------------------|-----|
| <b>Field Type:</b>       | Integer   | <b>FieldSize:</b> |     |
| <b>Type Name:</b>        | TNumlinks | <b>Min Value:</b> | 1   |
| <b>Answers Allowed:</b>  | 1         | <b>Max Value:</b> | 100 |
| <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 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 ( PMQ1183 ) |
| English text: CONTINUE |          |                                 |

| Attribute | Route                           |
|-----------|---------------------------------|
| Empty     | PM6A_IN - NAVIGATOR ( PMQ1183 ) |

#### 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     | Strength      | Display prescription medicine strength text field, EVNT.PMSTRUNI.  |
|                      | 3     | # 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.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**

---

**DESIGN NOTES**

---

DISABLE PREVIOUS PAGE.

# BOX ST45

Page Order # : 780

## 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 =<br>EVNT.EVORPFLAG = 1/ORP.<br><br>New event is Out of the Survey Reference Period =<br>See general specifications for Date check logic for<br>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 (TYPE OF STATEMENT = 2/Insurance OR 6/TricareAndInsurance) OR  
(TYPE OF STATEMENT = 4/Tricare AND ST5 – STTTYPE = 4/Tricare) OR  
(ST5 - MCARTYPE = 4/MSNPARTB), GO TO ST47 - ASGNTAKE ( STQ2020 ).  
  
ELSE GO TO BOX ST47 - (STQ2050 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

468      TypeOfStatement      Type of Statement = COST.STATTYPE.

## 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 ST5 - 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**

Page Order # : 840

**BOX INSTRUCTIONS**

---

( STQ2050 ) IF ((TYPE OF STATEMENT = 8/MPDPBenefit) or (TYPE OF STATEMENT = 4/Tricare and ST5 - STTYPE = 8/MPDPorMAorTricare)), GO TO ST47A - TOTALCHG ( STQ2055 ).

ELSE IF (TYPE OF STATEMENT = 2/Insurance) OR (TYPE OF STATEMENT = 4/Tricare AND ST5 - STTYPE = 4/Tricare) OR (TYPE OF STATEMENT = 6/TricareAndInsurance), GO TO ST48 - TOTALCHG ( STQ2060 ).

ELSE IF ST5 - MCARTYPE = 4/MSNPartB, GO TO ST52 - TOTALCHG ( STQ2080 ).

ELSE IF ST5 - MCARTYPE = 6/MSNPartInpatient, GO TO ST56 - DAYSUSED ( STQ2100 ).

ELSE GO TO ST60 - TOTALCHG ( STQ2120 ).

**ASSIGNMENTS**

---

**TOTALTYP** If ST5 -MCARTYPE ^= 6/MSNPartInpatient, set  
 CORO.TOTALTYP = 1/TotalCharge on CORO where  
 CORO.CORORND = current round and  
 CORO.COROCOST = this ST charge bundle  
 COST.COSTNUM.

**TECHNICAL NOTES**

---

**468**      **TypeOfStatement**      Type of Statement = COST.STATTYPE.

**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 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.**TOTALAMT** COST.TOTALAMT = ST47A - TOTALCHG.**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> |

|                          |                 |     |
|--------------------------|-----------------|-----|
| <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:** 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

**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 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

---

|     |                 |                                      |
|-----|-----------------|--------------------------------------|
| 230 | AmountRemaining | Amount Remaining =<br>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) AMOUNT REMAINING: (AMOUNT REMAINING)  
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:** TAmnt

**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 - ASGN TAKE = 1/Yes and ((ST51 - MCAPPAMT ^= DK, RF) and (ST51 - MCPAYAMT ^= DK, RF)), set COST.AREMAING = (MCAPPAMT - MCPAYAMT);

Else if (ST47 - ASGN TAKE = 2/No or 3/CantTell) and ((ST51 - TOTALCHG ^= DK, RF) and (ST51 - MCPAYAMT ^= DK, RF)), set COST.AREMAING = (TOTALCHG - MCPAYAMT);

Else if ST47 - ASGN TAKE = 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 =<br>COST.AREMAING. |
|-----|-----------------|--------------------------------------|

## DESIGN NOTES

---



# ST52

Page Order # : 910

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> |

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:

INPUT FIELDS / ROUTING

**Field1:** TOTALCHG ( STQ2080 )

**Cheshire Name:** CORO.TOTALCHG

**Item Text display:**

**Item Text:**

**Label:** AMOUNT PROVIDER 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 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.] | 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:** AMOUNT 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:** MAXIMUM 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**

**Page Order # :** 920

## **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**

---

|            |                        |                                      |
|------------|------------------------|--------------------------------------|
| <b>230</b> | <b>AmountRemaining</b> | Amount Remaining =<br>COST.AREMAING. |
|------------|------------------------|--------------------------------------|

## **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) AMOUNT REMAINING: (AMOUNT REMAINING)  
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> |

Enable Functions:

|                 |     |
|-----------------|-----|
| <b>HELP</b>     | Yes |
| <b>COMMENTS</b> | Yes |
| <b>JUMPBACK</b> | No  |

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: 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 **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 - 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

**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 - 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 =<br>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

**Field Type:**                Integer

**Type Name:**                TDaysuseh

**Answers Allowed:**            1

**Drop Down List:**            No

**Lookup File:**                No

**Lookup File Name:**

**FieldSize:**

**Min Value:**                0

**Max Value:**                120

**Mask:**

**Number Label**

**Route**

---

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:** MAXIMUM 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 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."

#### HARD EDIT CHECKS



**TECHNICAL NOTES**

---

**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 =<br>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) AMOUNT REMAINING: (AMOUNT REMAINING)  
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**

---

**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**

---

# 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:**





**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 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."

#### 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 =<br>COST.AREMAING. |
|-----|-----------------|--------------------------------------|

## DESIGN NOTES

---

# ST60

Page Order # : 1030

Design Screen Type: Numeric

|         |          |          |
|---------|----------|----------|
| Fields: | Field 1: | TOTALCHG |
|         | Field 2: | NONCOVRD |
|         | Field 3: | COINSUR  |
|         | Field 4: | MAYBBILL |

|                   |          |    |
|-------------------|----------|----|
| 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: 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:** Always display (PROVIDER/FACILITY) in label in parenthesis.

**Item Text:**

**Label:** AMOUNT (PROVIDER/FACILITY) 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

**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.] | 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:** MAXIMUM 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

Page Order # : 1040

## 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 =<br>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) AMOUNT REMAINING: (AMOUNT REMAINING)  
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 ( 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**

---

|            |                      |   |
|------------|----------------------|---|
| <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:**

| Number | Label                    | Route                       |
|--------|--------------------------|-----------------------------|
| 1      | Yes                      | ST63 - TOTALCHG ( STQ2128 ) |
|        | <b>English text:</b> YES |                             |
| 2      | No                       | BOX ST63 - (STQ2135 )       |
|        | <b>English text:</b> NO  |                             |

**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

|                          |      |                   |           |
|--------------------------|------|-------------------|-----------|
| <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 - 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

**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 - 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**

---

**DESIGN NOTES**

---



# BOX ST63

Page Order # : 1080

## BOX INSTRUCTIONS

---

( STQ2135 ) 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 =<br>COST.AREMAING. |
|-----|-----------------|--------------------------------------|

## 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 - STTYPE ^= 8/MPDPorMAorTricare, display "AMOUNT REMAINING: \$(AMOUNT REMAINING)".  
Else do not display.

If ST5 - MCARTYPE ^= 6/MsnPartAlnpatient, display "[TOTAL CHARGE = \$(TOTAL CHARGE)]".  
Else do not display.

**Question display:** Interviewer Instructions:

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

If ST5 - STTYPE ^= 8/MPDPorMAorTricare, display "PROVIDER NAME".  
Else do not display.

If ST5 - STTYPE ^= 8/MPDPorMAorTricare, display "THEN ASK:"  
Else display "SELECT...".

Question Text:

If ST5 - STTYPE = 8/MPDPorMAorTricare, display "The total cost of prescriptions...".  
Else do not display.

If ST5 - STTYPE = 8/MPDPorMAorTricare, 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".

**ST64**

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.

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 TEXT).] [[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

|     |                 |   |
|-----|-----------------|---|
| 258 | TricarePlan     | PLAN.LOSEPLFG ^=EMPTY) is a deleted PLAN.<br>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. |
| 259 | InsurancePlan   | 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.                     |
| 468 | TypeOfStatement | Type of Statement = COST.STATTYPE.  |

**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 =<br>For this COST, there is a CORO where<br>(CORO.COROCOST=COST.COSTNUM &<br>CORO.CORORND=current round & CORO.TCHGPAID =<br>1/Yes).                                     |
| <b>232</b> | <b>NothingPaid</b>       | Nothing paid or Respondent does not know if anything<br>has been paid =<br>CORO.TCHGPAID = 2/No or DK on CORO where<br>(CORO.COROCOST = this COST.COSTNUM and<br>CORO.CORORND = current round). |

**DESIGN NOTES**

---

**BOX ST64B**

**BOX ST64B**

**Page Order # : 1093**

**BOX INSTRUCTIONS**

---

( STQ2701 ) CREATE SOURCE OF PAYMENT ROSTER .

IF ADMINISTERING ST AND (ONE OR MORE CHARGE BUNDLES ENTERED IN ST SECTION) AND (ST65 – STADDSOP1 HAS BEEN ASKED IN THE CURRENT ROUND) AND (PAYMENTS HAVE BEEN COLLECTED AT ST67), GO TO ST67 - TSOPAMT ( STQ2720 ).

ELSE GO TO ST65 - STADDSOP1 ( 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 COVERAGE GAP DISCOUNT:

TSOP.TSOPTTEXT = "COVERAGE GAP DISCOUNT"  
TSOP.TSOPTYPE = 13/CoverageGapDiscount.

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.TSOPTTEXT =  
If PLAN.PLANTYPE = 2/Medicaid, TSOP.TSOPTTEXT = 'MEDICAID/MEDICAID HMO';  
Else if PLAN.PLANTYPE = 6/Tricare, TSOP.TSOPTTEXT = "TRICARE".  
Else TSOP.TSOPTTEXT = PLAN.PLNAME;  
If PLAN.PLANTYPE = 7/MPDP, set TSOP.TSOPTYPE = 10/MedicarePartD.  
Else set TSOP.TSOPTYPE = 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.TSOPTTEXT = DMEM.DMNAMEX  
TSOP.TSOPTYPE = 9/DM  
TSOP.TSOPDMEM = DMEM.DMEMNUM  
TSOP.TSOPDISP = "(DM)"

Repeat for all DMEMs.

Next, store all Other Sources of Payments (not flagged as deleted) on OSOP:

Store OSOP:

TSOP.TSOPTTEXT = OSOP.OSOPTTEXT  
TSOP.TSOPTYPE = 4/OSOP  
TSOP.TSOPOSOP = OSOP.OSOPNUM  
IF (OSOP.OSOPISHI ^= NULL & (OSOP.OSOPISHI = DK or RF)), TSOP.TSOPDISP = "(UNKNOWN)".  
ELSE TSOP.TSOPDISP = "(OSOP)".

Repeat for all OSOPs.

|                  |   |
|------------------|---|
| <b>TSOPNUM</b>   | Beginning with 01, create TSOP where<br>TSOP.TSOPNUM = highest TSOP.TSOPNUM + 01. |
| <b>TSOPTTEXT</b> | Set TSOP.TSOPTTEXT as specified above.  |
| <b>TSOPTYPE</b>  | Set TSOP.TSOPTYPE as specified above.   |
| <b>LOADFLAG</b>  | Set TSOP.LOADFLAG = 1/Yes.  |
| <b>TSOPPTYP</b>  | If SOP is a Health Insurance plan, set<br>TSOP.TSOPPYPE = PLAN.PLANTYPE.          |

|                 |  |
|-----------------|--|
| <b>TSOPPLAN</b> | If SOP is a Health Insurance plan, set<br>TSOP.TSOPPLAN = PLAN.PLANNUM.    |
| <b>TSOPOSOP</b> | If SOP is an Other Source of Payment, set<br>TSOP.TSOPOSOP = OSOP.OSOPNUM. |
| <b>TSOPDISP</b> | Set TSOP.TSOPDISP as specified above.                                      |
| <b>TSOPDMEM</b> | If SOP is a Discount Membership plan, set<br>TSOP.TSOPDMEM = DMEM.DMEMNUM. |

**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>53</b>  | <b>PlanTypes</b>                 | Medicare: PLANTYPE=1/Medicare.<br>Medicaid: PLANTYPE=2/Medicaid.<br>Medicare Advantage: PLANTYPE=5/MHMO.<br>Tricare: PLANTYPE=6/Tricare.<br>Public: PLANTYPE=3/PublicPlan.<br>Private: PLANTYPE=4/PrivatePlan.<br>Medicare Prescription Drug: PLANTYPE=7/MPDP. |
| <b>252</b> | <b>DeletedOSOPs</b>              | Deleted OSOPs that are not valid for displays or checks =<br>Any OSOP where (OSOP.OSOPHIDE=1/Yes or<br>OSOP.LOSEOSFG ^=EMPTY) is a deleted OSOP.   |
| <b>117</b> | <b>DeletedDM</b>                 | Deleted Discount Membership plans that are not valid for<br>displays or checks =<br>Any DMEM where (DMEM.LOSEDMFG ^= EMPTY) is a<br>deleted DM.  |
| <b>38</b>  | <b>DMCurrentRnd</b>              | SP reported having a Discount Membership plan anytime<br>during the current round =<br>There is a DMEM and DMRO where<br>(DMRO.DMRODMEM = DMEM.DMEMNUM and<br>DMRO.DMRORND = current round and DMRO.DMHAVE<br>= 1/Yes).<br>Exclude Deleted DM's. See T.N. 117. |
| <b>457</b> | <b>ChgBundlePaymEntere<br/>d</b> | One or more charge bundles entered in ST section and<br>ST65 – STADDSOP1 has been asked in the current<br>round =<br>HRND.EVERSTMT = 1/Yes on HRND where<br>HRND.HRNRND = current round and (ST65-<br>STADDSOP1 = 1/YES or 2/NO)                               |
| <b>464</b> | <b>STPaymCollected</b>           | Payments collected at ST67 =<br>HRND.STSOPFLG = 1/Yes on HRND where<br>HRND.HRNRND = current round. HRND.STSOPFLG<br>is set to 1/Yes at BOX ST67A after 1st ST charge bundle<br>where payments collected.  |

**DESIGN NOTES**

When administering ST, we will stop probing for new SOP's at ST65 once we collect an ST charge bundle and payments have been collected. A flag is set at BOX ST67A, HRND.STSOPFLG = 1/Yes, which flags that we should no longer probe for new SOP's in ST.

However, if administering NS or CPS and SP reports a statement and NS or CPS routes to CPS, we will always probe for new SOP's at ST65.

**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:

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:

Do not display TSOP.TSOPTYPE = 11/MedicareSubsidy.

Display all remaining Sources of Payments in the following order based on TSOP.TSOPTYPE:

- = 1/SPFamily
- = 2/ProvDiscount
- = 12/ExtraHelp
- = 13/CoverageGapDiscount
- = 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.

Report header: SOURCES OF PAYMENT

Report layout:

Column 1, header="SOP NAME".

Column 1, display = TSOP.TSOPTEXT.

Column 2, header = "SOP TYPE".

Column 2, display =

If TSOP.TSOPDISP ^= empty, display TSOP.TSOPDISP.

Else do not display.

**TEXT:**

**Context Header:**

**Int. Instr I:** ARE ALL OF THE SOURCES OF PAYMENT NECESSARY FOR COMPLETING THE STATEMENT SECTION 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**

---

**DESIGN NOTES**

---

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:

Question display:

Multi Field display:

**Roster/Grid Instructions:** Display all eligible Source of Payments stored on TSOP based on the following logic:

Do not display TSOP.TSOPTYPE = 9/DM or TSOP.TSOPTYPE = 11/MedicareSubsidy.

Display all remaining Sources of Payments in the following order based on TSOP.TSOPTYPE:

- = 1/SPFamily
- = 2/ProvDiscount
- = 12/ExtraHelp
- = 13/CoverageGapDiscount
- = 6/Medicare
- = 8/MHMO
- = 10/MedicarePartD
- = 5/VA
- = 3/PlanNotMHMO
- = 4/OSOP

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.TSOPTEXT.  |
|                      | 2     | SOP Type | If TSOP.TSOPDISP ^= empty, display TSOP.TSOPDISP.<br>Else do not display. |

Report display:

TEXT: -----

Context Header:

Int. Instr I: ADD ALL ADDITIONAL SOURCES OF PAYMENT.

Question Text:

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

Field1: SOP\_ST1 ( STQ2703 )

Cheshire Name: TEMP

Item Text display:

Item Text:

Label:

Label Position:

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

| 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 =<br>There is a TSOP where TSOP.TSOPPTYP=2/Medicaid. |
| <b>264</b> | <b>TricareSOP</b>  | Tricare already on SOP roster =<br>There is a TSOP where TSOP.TSOPPTYP = 6/Tricare. |

#### DESIGN NOTES

---



**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 - STTYPE ^= 8/MPDPorMAorTricare, 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 - STTYPE = 3/MedicareAndInsurance, display "REFER TO INSURANCE STATEMENT."  
Else if ST5 - STTYPE = 5/MedicareAndTricare, display "REFER TO TRICARE STATEMENT."  
Else if ST5 - STTYPE = 6/TricareAndInsurance or 7/MedicareAndTricareAndInsurance, display "REFER TO INSURANCE AND TRICARE STATEMENTS."  
Else if ST5 - STTYPE = 8/MPDPorMAorTricare and TYPE OF STATEMENT = 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 - STTYPE = 8/MPDPorMAorTricare and TYPE OF

**ST67**

STATEMENT = 8/MPDPBenefit, THEN:

Do not display TSOP.TSOPTYPE = 2/ProvDiscount, 6/Medicare, and 11/MedicareSubsidy.

Display all remaining Sources of Payments in the following order based on TSOP.TSOPTYPE:

- = 1/SPFamily
- = 12/ExtraHelp
- = 13/CoverageGapDiscount
- = 8/MHMO
- = 10/MedicarePartD
- = 5/VA
- = 3/PlanNotMHMO
- = 4/OSOP
- = 9/DM

ELSE THEN:

Do not display TSOP.TSOPTYPE = 11/MedicareSubsidy, 12/ExtraHelp, 13/CoverageGapDiscount, 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 - STTYPE = 8/MPDPorMAorTricare, 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 - STTYPE = 8/MPDPorMAorTricare, 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.TSOPTEXT. Display Only. |

**ST67**

|   |                  |  |
|---|------------------|--|
| 2 | SOP Type         | If TSOP.TSOPDISP ^= empty, display TSOP.TSOPDISP.<br>Else do not display.<br>Display only. |
| 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 ST67HE - (STQ2740 ) |

| Attribute | Route                   |
|-----------|-------------------------|
| Empty     | BOX ST67HE - (STQ2740 ) |

|            |                         |
|------------|-------------------------|
| Don't know | BOX ST67HE - (STQ2740 ) |
|------------|-------------------------|

|         |                         |
|---------|-------------------------|
| Refusal | BOX ST67HE - (STQ2740 ) |
|---------|-------------------------|

**BACKGROUND VARIABLE ASSIGNMENTS**

**SOFT EDIT CHECKS**

**HARD EDIT CHECKS**

**TECHNICAL NOTES**

468      **TypeOfStatement**      Type of Statement = COST.STATTYPE.

**DESIGN NOTES**

# **BOX ST67HE**

**Page Order # :** 1115

## **BOX INSTRUCTIONS**

---

( STQ2740 ) IF AT LEAST ONE TSOPAMT = DK OR RF OR THE SUM OF ALL TSOPAMT  
VALUES FOR THIS COST > 0.00, GO TO BOX ST67A - (STQ2780 ).  
  
ELSE GO TO ST67HE - PAYMHE ( STQ2760 ).

## **ASSIGNMENTS**

---

## **TECHNICAL NOTES**

---

## **DESIGN NOTES**

---

# ST67HE

Page Order # : 1117

Design Screen Type: No Entry

Fields: Field 1: PAYMHE

|                   |          |     |
|-------------------|----------|-----|
| 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:

Question display:

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header:

Int. Instr I: 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'.

USE "PREVIOUS PAGE" TO RETURN TO THE SOP GRID AND MAKE CORRECTIONS.

Question Text:

Int. Instr II:

**INPUT FIELDS / ROUTING**

---

Field1: PAYMHE ( STQ2760 )

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 | ST67HE-PAYMHE |
| English text: CONTINUE |          |               |

| Attribute | Route         |
|-----------|---------------|
| Empty     | ST67HE-PAYMHE |

**BACKGROUND VARIABLE ASSIGNMENTS**

**SOFT EDIT CHECKS**

**HARD EDIT CHECKS**

**TECHNICAL NOTES**

**DESIGN NOTES**

DISABLE NEXT PAGE.

ST67HE-PAYMHE routes back to ST67HE-PAYMHE to enforce the intended hard edit. To route past this edit screen, corrections must be made at the SOP Grid by using Previous Page.

# 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

---

At BOX ST67A, flag that there has been at least one ST charge bundle added where payments have been collected. The flag, HRND.STSOPFLG, is checked at BOX ST64B when additional ST charge bundles are added and if set to 1/Yes, BOX ST64B will skip probing for new SOP's at ST65.

**STSOPFLG** If HRND.STSOPFLG = NULL on HRND where  
HRND.HRNRDND = current round, set  
HRND.STSOPFLG = 1/Yes.

## TECHNICAL NOTES

---

## DESIGN NOTES

---



# BOX ST67B

## BOX INSTRUCTIONS

---

( 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 ST69E - (STQ2840 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

|     |         |   |
|-----|---------|---|
| 248 | SOPPlan | Source of Payment is a HI Plan =<br>Medicaid: TSOP.TSOPISHI=1/Medicaid<br>Public: TSOP.TSOPISHI=2/PublicPlan<br>Private: TSOP.TSOPISHI=3/PrivatePlan<br>MHMO: TSOP.TSOPISHI=7/MHMO<br>Tricare: TSOP.TSOPISHI=9/Tricare.<br>MPDP: TSOP.TSOPISHI=10/MedicarePartD |
|-----|---------|---|

## DESIGN NOTES

---

# 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**

---

**ST67BINT**

**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**

**SOFT EDIT CHECKS**

**HARD EDIT CHECKS**

**TECHNICAL NOTES**

**DESIGN NOTES**

# 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:**

---

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 ST69E - (STQ2840 ) |
|        | <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**

---

- ( 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**

---

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 or tbiPLAN.wvsDeleteFlag = Yes, this stopped Medicaid plan will be restarted. Update existing PLAN flags = empty or No 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 or tbiPLAN.wvsDeleteFlag = Yes, this stopped Tricare plan will be restarted. Update existing PLAN flags = empty or No 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:

|                 |  |
|-----------------|--|
| <b>PLANNUM</b>  | If creating a new PLAN, create PLAN where<br>PLAN.PLANNUM = highest PLAN.PLANNUM + 01.   |
| <b>PLANRND</b>  | If creating a new PLAN, set PLAN.PLANRND =<br>current round.   |
| <b>PLANTYPE</b> | Set PLANTYPE based on TSOPISHI:<br>=1/Medicaid, PLANTYPE=2/Medicaid.<br>=2/PublicPlan, PLANTYPE=3/PublicPlan.<br>=3/PrivatePlan, PLANTYPE=4/PrivatePlan.<br>=7/MHMO, PLANTYPE=5/MHMO.<br>=9/Tricare, PLANTYPE=6/Tricare.<br>=10/MedicarePartD, PLANTYPE=7/MPDP.          |
| <b>PLNAME</b>   | If creating a new PLAN,<br>If SOP is Medicaid, set PLAN.PLNAME =<br>"MEDICAID".<br>Else if SOP is Tricare, set PLAN.PLNAME =<br>"TRICARE".<br>Else set PLAN.PLNAME = TSOP.TSOPTEXT.  |
| <b>PLROPLAN</b> | Create PLRO where PLRO.PLROPLAN = new<br>PLAN.PLANNUM.   |
| <b>PLRORND</b>  | PLRO.PLRORND = current round.  |
| <b>COVANYTM</b> | If TSOP.TSOPISHI = 7/MHMO or 10/MedicarePartD,<br>set PLRO.COVANYTM = 1/Yes.   |
| <b>TSOPTYPE</b> | If TSOP.TSOPISHI = 1/Medicaid, 2/PublicPlan,<br>3/PrivatePlan, 9/Tricare, set TSOP.TSOPTYPE =<br>3/PlanNotMHMO.<br>Else if TSOP.TSOPISHI = 7/MHMO, set<br>TSOP.TSOPTYPE = 8/MHMO.<br>Else if TSOP.TSOPISHI=10/MedicarePartD, set<br>TSOP.TSOPTYPE =10/MedicarePartD.     |
| <b>TSOPPTYP</b> | Set TSOP.TSOPPTYP = PLAN.PLANTYPE.   |
| <b>TSOPPLAN</b> | Set TSOP.TSOPPLAN = PLAN.PLANNUM.  |
| <b>TSOPDISP</b> | Set TSOP.TSOPDISP based on PLAN.PLANTYPE:<br>= 2/Medicaid, TSOPDISP = "(MCAD)".<br>= 3/PublicPlan, TSOPDISP = "(PUBL)".<br>= 4/PrivatePlan, TSOPDISP = "(PRIV)".<br>= 5/MHMO, TSOPDISP = "(MHMO)".<br>= 6/Tricare, TSOPDISP = "(TRIC)".<br>=7/MPDP, TSOPDISP = "(MPDP)". |
| <b>PLANDFLG</b> | If restarting Medicaid or Tricare plan, set<br>PLAN.PLANDFLG = empty. In addition, if<br>tblPLAN.wvsDeleteFlag = Yes, update to<br>tblPLAN.wvsDeleteFlag = No.   |
| <b>LOSEPLFG</b> | If restarting Medicaid or Tricare plan, set<br>PLAN.LOSEPLFG = empty.  |
| <b>PLSOPFLG</b> | If creating new PLAN, set PLAN.PLSOPFLG = 1/Yes.   |

#### TECHNICAL NOTES

|            |                |  |
|------------|----------------|--|
| <b>248</b> | <b>SOPPlan</b> | Source of Payment is a HI Plan =<br>Medicaid: TSOP.TSOPISHI=1/Medicaid<br>Public: TSOP.TSOPISHI=2/PublicPlan |
|------------|----------------|--|



**BOX ST67C**

Private: TSOP.TSOPISHI=3/PrivatePlan  
MHMO: TSOP.TSOPISHI=7/MHMO  
Tricare: TSOP.TSOPISHI=9/Tricare.  
MPDP: TSOP.TSOPISHI=10/MedicarePartD

- 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.
- 65 MHMOCurrent** SP has a current Medicare Managed Care plan  
(Medicare Advantage 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.
- 342 MPDPCurrent** 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**

---

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:** Display name of current Medicare Managed Care Plan, PLAN.PLNAME.

**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:** MA PLAN: (CURRENT MEDICARE MANAGED CARE PLAN NAME)

**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  
PLAN.MHMODFLG=1/Yes or PLAN.PLANHIDE=1/Yes or  
PLAN.LOSEPLFG ^=EMPTY) is a deleted PLAN.
- 65 MHMOCurrent** SP has a current Medicare Managed Care plan  
(Medicare Advantage 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:** Display name of Medicare Managed Care Plan Name, PLAN.PLNAME, added at ST66 Source of Payment Roster.

**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:** MPDP: (ST66 SOP MEDICARE PRESCRIPTION DRUG PLAN)

**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               | HIMC6A - MHMORXTM ( HIQ4020 )<br>VERIFY IN HI. |
| -----  |                   |  |
|        | 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**

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.PLRORNDC = current round.

**SOFT EDIT CHECKS**

---

**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

|           |                 |  |
|-----------|-----------------|--|
| <b>59</b> | <b>SPStatus</b> | SP is Alive and not institutionalized =<br>MRES.SPALIVE=1/Alive or empty |
|           |                 | SP is Alive =<br>MRES.SPALIVE=1/Alive, 2/AliveAndInstitute, or EMPTY     |
|           |                 | SP is Institutionalized =<br>MRES.SPALIVE=2/AliveAndInstitute            |
|           |                 | SP is Deceased =<br>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 - STMDPDCHNG = 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:** 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.

**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:** MPDP: (ST66 SOP MEDICARE PRESCRIPTION DRUG PLAN)

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:</b> YES |                        |
| 2      | No                       | BOX ST69A - (STQ2825 ) |
|        | <b>English text:</b> NO  |                        |

| 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**

---

|           |                 |  |
|-----------|-----------------|--|
| <b>59</b> | <b>SPStatus</b> | <p>SP is Alive and not institutionalized =<br/>MRES.SPALIVE=1/Alive or empty</p> <p>SP is Alive =<br/>MRES.SPALIVE=1/Alive, 2/AliveAndInstitute, or EMPTY</p> <p>SP is Institutionalized =<br/>MRES.SPALIVE=2/AliveAndInstitute</p> <p>SP is Deceased =<br/>MRES.SPALIVE=3/Deceased.</p> |
|-----------|-----------------|--|

**DESIGN NOTES**

---

# BOX ST69A

Page Order # : 1155

## BOX INSTRUCTIONS

---

( STQ2825 ) GO TO ST67B\_IN - NAVIGATOR ( STQ2815 ).

## ASSIGNMENTS

---

## TECHNICAL NOTES

---

|     |         |   |
|-----|---------|---|
| 248 | SOPPlan | Source of Payment is a HI Plan =<br>Medicaid: TSOP.TSOPISHI=1/Medicaid<br>Public: TSOP.TSOPISHI=2/PublicPlan<br>Private: TSOP.TSOPISHI=3/PrivatePlan<br>MHMO: TSOP.TSOPISHI=7/MHMO<br>Tricare: TSOP.TSOPISHI=9/Tricare.<br>MPDP: TSOP.TSOPISHI=10/MedicarePartD |
|-----|---------|---|

## DESIGN NOTES

---

HI returns to ST at BOX ST69A.

**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 and TSOP fields as specified below.

|                 |   |
|-----------------|---|
| <b>OSOPNUM</b>  | OSOP.OSOPNUM = highest OSOP.OSOPNUM + 01.   |
| <b>OSOPRND</b>  | OSOP.OSOPRND = current round.   |
| <b>OSOPTXT</b>  | OSOP.OSOPTXT = TSOP.TSOPTXT.  |
| <b>OSOPISHI</b> | OSOP.OSOPISHI = TSOP.TSOPISHI.  |
| <b>TSOPTYPE</b> | TSOP.TSOPTYPE = 4/OSOP.   |
| <b>TSOPOSOP</b> | TSOP.TSOPOSOP = OSOP.OSOPNUM.   |
| <b>TSOPDISP</b> | IF (OSOP.OSOPISHI ^= NULL & (OSOP.OSOPISHI = DK or RF)), TSOP.TSOPDISP = "(UNKNOWN)".<br>ELSE TSOP.TSOPDISP = "(OSOP)". |

**TECHNICAL NOTES**

---

|            |                  |  |
|------------|------------------|--|
| <b>339</b> | <b>SOPisOSOP</b> | Source of Payment is an "Other Source of Payment" =<br>TSOP.TSOPISHI = 4/NotHIPlanVA, 5/MilitaryPlanNotVA,<br>6/NotSPsPlan, 8/DM, DK, or RF. |
|------------|------------------|--|

**DESIGN NOTES**

---

**BOX ST69F**

Page Order # : 1168

**BOX INSTRUCTIONS**

---

( STQ2842 ) IF ((TYPE OF STATEMENT = 8/MPDPBenefit) or (TYPE OF STATEMENT = 4/Tricare and ST5 - STTYPE = 8/MPDPorMAorTricare)) 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. |
| <b>468</b> | <b>TypeOfStatement</b> | Type of Statement = COST.STATTYPE.  |

**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.

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:**

IF SOURCE OF PAYMENT NEEDS ADDITION OR CORRECTION, USE "PREVIOUS PAGE" TO RETURN TO THE SOP GRID.

#### INPUT FIELDS / ROUTING

---

**Field1:** AMTSCORR ( STQ2850 )

**Cheshire Name:** CORO.AMTSCORR

**Item Text display:** Do not display response option 2/NoAddCorrectSOP

**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        | BOX ST77C - (STQ2910 )      |
| <b>English text:</b> ENTRIES ABOVE ARE CORRECT            |                          |                             |
| 2   | NoAddCorrectSOP          | DO NOT DISPLAY.             |
| <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.

IF SOURCE OF PAYMENT NEEDS ADDITION OR CORRECTION, USE "PREVIOUS PAGE" TO RETURN TO THE SOP GRID.

**INPUT FIELDS / ROUTING**

---



**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.



**ST72**

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:** 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:** 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 PAYMENTS: (TOTAL PAYMENTS)  
 AMOUNT REMAINING: (DIFFERENCE BETWEEN PAYMENTS  
 AND 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:**

IF SOURCE OF PAYMENT NEEDS ADDITION OR CORRECTION, USE "PREVIOUS PAGE" TO RETURN TO THE SOP GRID.

#### **INPUT FIELDS / ROUTING**

---

**Field1:** AMTSCORR ( STQ2875 )

**Cheshire Name:** CORO.AMTSCORR

**Item Text display:** Do not display response options 2/NoAddCorrectSOP or 3/AmountRemainingIncorrect.

**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   | ST74 - INFOEXPLAIN ( STQ2877 ) |
|        | <b>English text:</b> ENTRIES ABOVE ARE CORRECT            |                                |
| 2      | NoAddCorrectSOP   | DO NOT DISPLAY.                |
|        | <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

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#### SOFT EDIT CHECKS

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#### HARD EDIT CHECKS

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#### TECHNICAL NOTES

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#### DESIGN NOTES

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**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: (DIFFERANCE BETWEEN TOTAL CHARGE AND PAYMENTS)

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

**Int. Instr II:** IS THERE ADDITIONAL INFORMATION ON THE 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:**

| <b>Number</b> | <b>Label</b>             | <b>Route</b>                 |
|---------------|--------------------------|------------------------------|
| 1             | Yes                      | ST75 - ENTERCOM2 ( STQ2880 ) |
|               | <b>English text:</b> YES |                              |
| 2             | No                       | BOX ST77C - (STQ2910 )       |
|               | <b>English text:</b> NO  |                              |

**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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**DESIGN NOTES**

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**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 ) |
| -----                         |          |                        |
| <b>English text:</b> CONTINUE |          |                        |
| -----                         |          |                        |

| Attribute | Route                  |
|-----------|------------------------|
| Empty     | BOX ST77C - (STQ2910 ) |
| -----     |                        |

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**SOFT EDIT CHECKS**

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**HARD EDIT CHECKS**

---

**TECHNICAL NOTES**

---

**DESIGN NOTES**

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**BOX ST77C**

**BOX ST77C**

**Page Order # : 1240**

**BOX INSTRUCTIONS**

( STQ2910 )      CREATE PAYMENTS FOR AMOUNTS ENTERED AT ST67 .  
                          GO TO BOX ST77D - (STQ2915 ).

**ASSIGNMENTS**

Payments details are stored on PAYM:

PAYM key = PAYM.PAYMBASE + PAYM.PAYMCOST + PAYM.PAYMNUM.

PAYM.PAYMCOST = COST.COSTNUM of this charge bundle being asked about.

PAYM.PAYMNUM = Unique Number assigned to unique payer linked to this charge bundle.

PAYM records are only created for payers where TSOP.TSOPAMT ^= NULL.

TSOP.TSOPAMT may be >= 0, DK, or RF.

Only one PAYM record will be created per unique payer per charge bundle, regardless of PAYM.PAYMRNDC.

DETAILS:

For each payer where TSOP.TSOPAMT >=0, DK, or RF:

If TSOP.TSOPPAYM ^= NULL then do;

    There is a PAYM record linked to this charge bundle for this payer where  
     TSOP.TSOPPAYM = PAYM.PAYMCOST + PAYM.PAYMNUM and PAYM.PAYMCOST =  
     this charge bundle COST.COSTNUM.

    Update existing PAYM.PAYMAMT = TSOP.TSOPAMT.

Else if there is a PAYM where PAYM.PAYMCOST = this charge bundle COST.COSTNUM  
 and

    ((TSOP.TSOPATYPE = 1/SPFamily and PAYM.PAYMATYPE = 1/SPFamily) or

    (TSOP.TSOPATYPE = 2/ProvDiscount and PAYM.PAYMATYPE = 2/ProvDiscount) or

    (TSOP.TSOPATYPE = 5/VA and PAYM.PAYMATYPE = 5/VA) or

    (TSOP.TSOPATYPE = 6/Medicare and PAYM.PAYMATYPE = 6/Medicare) or

    (TSOP.TSOPATYPE = 7/OtherMilitaryPlanNotVA and PAYM.PAYMATYPE =

7/OtherMilitaryPlanNotVA) or

    (TSOP.TSOPATYPE = 11/MedicareSubsidy and PAYM.PAYMATYPE =

11/MedicareSubsidy) or

    (TSOP.TSOPATYPE = 12/ExtraHelp and PAYM.PAYMATYPE = 12/ExtraHelp) or

    ((TSOP.TSOPATYPE = 4/OSOP and PAYM.PAYMATYPE = 4/OSOP) and

(TSOP.TSOPOSOP = PAYM.PAYMOSOP)) or

    ((TSOP.TSOPATYPE = 9/DM and PAYM.PAYMATYPE = 9/DM) and (TSOP.TSOPDMEM =  
 PAYM.PAYMDMEM)) or

    ((TSOP.TSOPATYPE = 3/PlanNotMHMO and PAYM.PAYMATYPE = 3/PlanNotMHMO)

and (TSOP.TSOPPLAN = PAYM.PAYMPLAN)) or

    ((TSOP.TSOPATYPE = 8/MHMO and PAYM.PAYMATYPE = 8/MHMO) and

(TSOP.TSOPPLAN = PAYM.PAYMPLAN)) or

    ((TSOP.TSOPATYPE = 10/MedicarePartD and PAYM.PAYMATYPE = 10/MedicarePartD)

and (TSOP.TSOPPLAN = PAYM.PAYMPLAN))), then do:

    This PAYM record is linked to the current round charge bundle for this payer.

    Update PAYM.PAYMAMT = TSOP.TSOPAMT.

Else do;

    Create a new current round PAYM record for this payer.

    Set PAYM.PAYMAMT = TSOP.TSOPAMT.

    Set additional fields on PAYM as specified below.

**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

Page Order # : 1245

## BOX INSTRUCTIONS

---

( 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 | SPFamilyPayment | SP/Family Payment =<br>For this COST, there is PAYM where (PAYM.PAYMCOST = COST.COSTNUM & PAYM.PAYMTYPE = 1/SPFamily & PAYM.PAYMDFLG^1/Yes).<br>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: Display SP/Family payment.

Question display: Display SP/Family payment.

Multi Field display:

Roster/Grid Instructions:

Roster/Grid display:

Report display:

**TEXT:**

---

Context Header: (ST CLAIM HEADER) SP/FAMILY PAYMENT: (SP/FAMILY PAYMENT)  
 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 ) |
|        | English text: YES |                        |
| 2      | No                | BOX ST78A - (STQ2922 ) |
|        | English text: NO  |                        |

| 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 =<br>(MRES.INTTYPE = 8/ExitInterviewHadPrev or<br>9/ExitInterviewSkipPre) on MRES where<br>MRES.MRESRND = current round. |
| <b>271</b> | <b>COST2RoundsOld</b> | Charges first collected 2 rounds previous to current round<br>=<br>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**

---

|     |                       |   |
|-----|-----------------------|---|
| 16  | <b>ExitSample</b>     | SP is in the Exit Sample =<br>(MRES.INTTYPE = 8/ExitInterviewHadPrev or<br>9/ExitInterviewSkipPre) on MRES where<br>MRES.MRESRND = current round. |
| 271 | <b>COST2RoundsOld</b> | Charges first collected 2 rounds previous to current round<br>=<br>COST.COSTRND = (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

|                |                 |                 |
|----------------|-----------------|-----------------|
| <b>Fields:</b> | <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.EXPAYAMT

**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**

---

### **TECHNICAL NOTES**

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### **DESIGN NOTES**

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**BOX ST80**

Page Order # : 1260

**BOX INSTRUCTIONS**

---

( STQ2930 ) IF CURRENTLY ADMINISTERING NS, GO TO BOX NSBEG - ( NSQ1010 ).

ELSE IF CURRENTLY ADMINISTERING CPS, GO TO BOX CPSBEG - ( CPS1010 ).

ELSE IF ((TYPE OF STATEMENT = 8/MPDPBenefit) or (TYPE OF STATEMENT = 4/Tricare and ST5 - STTYPE = 8/MPDPorMAorTricare)), 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**

---

**468**      **TypeOfStatement**      Type of Statement = COST.STATTYPE.

**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:**

| <b>Number</b> | <b>Label</b>             | <b>Route</b>              |
|---------------|--------------------------|---------------------------|
| 1             | Yes                      | ST4 - MATCHST ( STQ1110 ) |
|               | <b>English text: YES</b> |                           |
| 2             | No                       | BOX STEND - ( STQ3010 )   |
|               | <b>English text: NO</b>  |                           |

**BACKGROUND VARIABLE ASSIGNMENTS**

---

**SOFT EDIT CHECKS**

---

**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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