Outstanding Publish - Project Description
For a more in-depth guide to this project, this project was covered step-by-step at the end of every section throughout the course.

Many claims require regular publishes on the Reserving Tool, so we need to develop a procedure that will:
1. Identify which claims require regular publishes on the Reserving Tool
2. Calculate how many days left the current examiner has to complete a publish, or if the publish is late, how many days a publish is overdue
3. Display key information related to these claims including the calculated fields in step 2
4. Accept parameters allowing users to see results for specific situations

The final query should filter out the claims that don't require a publish, and should display the required fields that will give us the information requested for this project.

1. - Identifying which claims require regular publishes on the Reserving Tool
You only want to include claims where:
- The claim status is currently open, or it is currently re-opened and the re-open reason is not to pay a bill (i.e. ReopenReasonID != 3)
- The office that the claim is being handled is in Sacramento, San Francisco, or San Diego
- At least one of the following is true:
    - The claimant type is "First Aid" or "Medical-Only"
    - The office is in San Diego, the examiner's title includes "analyst", and the total reserve sum of the five reserve type buckets (Medical, TD, PD, Rehab, and Expense.. I.e. all buckets except Fatality) is greater than the examiner's reserve limit
    - The office is in either Sacramento or San Francisco, and one of the following is true:
        - The total reserve amount in the medical reserve bucket for the claim is greater than $1000
        - The total reserve amount in the expense reserve bucket for the claim is greater than $100
        - The sum of the total reserve amount in the TD, PD, and Rehab reserve buckets for the claim is greater than $0

2. - Calculate days left/days overdue for a publish
Examiners are required to complete a publish in the reserving tool every so often. The rules as to when they need to complete a publish are as follows:
- If there are no publishes on the claim, the examiner has 14 days from when they were assigned the claim to complete a publish
- If there is at least one publish on the claim, the examiner has the later of 90 days after the last publish or 14 days after they were assigned the claim

<u>Days To Complete</u> - if the examiner still has time to complete a publish before it is due, then this field will be the number of days left. Otherwise, if a publish is overdue, this field should be 0.

<u>Days Overdue</u> - if the examiner still has time to complete a publish before it is due, then this field should be 0. Otherwise, if a publish is overdue, this field should be the number of days that the publish is overdue.

When calculating how many days until the examiner needs to complete a publish, **calculate the dates as of January 1, 2019**.

3. - Display key information
The results of the query should display the following fields for each applicable claim *[brackets is the table the field can be found in]*:
- Claim Number *[Claim]*
- Examiner Code, Name, and Title *[Users]*
- Supervisor Code, Name, and Title *[Users]*
- Manager (Supervisor of the Supervisor) Code, Name, and Title *[Users]*
- Office *[Office]*
- Claim Status *[ClaimStatus]*
- Claimant Name *[Patient]*
- Claimant Type *[ClaimantType]*
- Current Examiner Assigned Date *[ClaimLog]*
- Reopened Date *[Claimant]*
- Adjusted Assigned Date = (later of <u>Assigned Date</u> and <u>Reopened Date</u>)
- Last Published Date *[ReservingTool]*
- Days Since Last Published Date -- calculated, details in step 2
- Days Since Adjusted Assigned Date -- calculated, details in step 2
- Days To Complete -- calculated, details in step 2
- Days Overdue -- calculated, details in step 2

4. - Accept parameters
The procedure we are creating should be able to accept the following optional parameters which will filter the final results of the query:
- Days To Complete
    - Displays claims with less than or equal to the inputted number of days to complete a publish
- Days Overdue
    - Displays claims with greater than or equal to the inputted number of days that a publish is overdue
- Office
    - Displays claims with examiners based in the inputted office
- Manager Code
    - Displays claims with claims managed by users with the inputted manager code
- Supervisor Code
    - Displays claims supervised by users with the inputted supervisor code

- Examiner Code
  - Displays claims examined by users with the inputted examiner code
- Team
  - Displays claims where at least one of the examiner's, supervisor's, or manager's titles includes the inputted string (e.g. if the word "analyst" is inputted, one or more titles should include the word "analyst")
- Claims Without a Publish on the Reserving Tool
  - Displays claims that do not yet have a publish on a Reserving Tool if a "1" is inputted

How to determine who was working on that claim:
The 'EnteredBy' field in the Reserving Tool table is not reliable for this because anybody can create or save records in the tool, and all this time is the responsibility of the Examiner.
You need to find which examiner was assigned onto the claim at the time of the publish, and this information can be found in the ClaimLog table.
If the claim is assigned to a different examiner in the middle of working on a publish, that time is still included toward the total time spent on that publish.