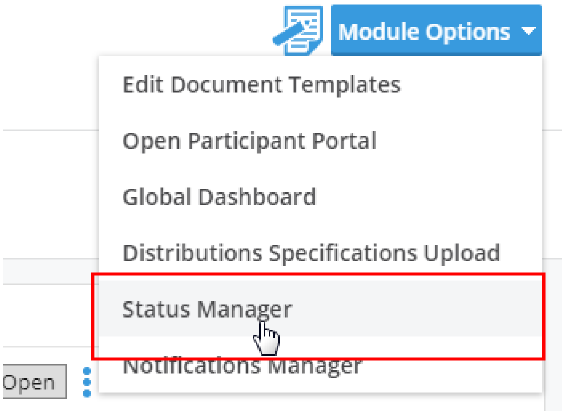
Status Manager

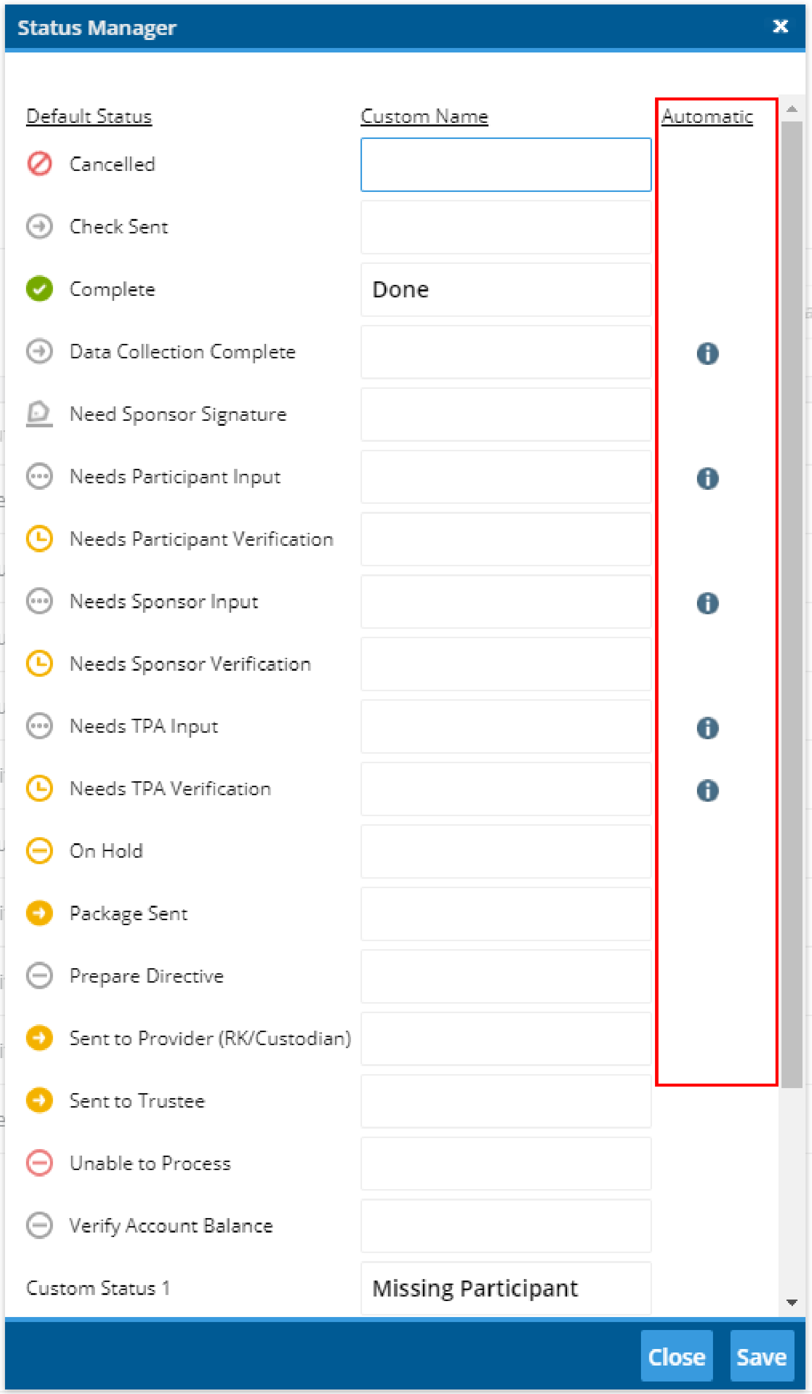
12/04/2024 4:12 pm CST

Status Manager Video

If you are a Designated Admin or Master user in your account, you can customize your statuses via the “Module Options” button in the upper right hand corner of the Plan Level Dashboard. The Statuses modal will appear listing all of the system default statuses.



When the drop down menu appears, you’ll see three columns: Default Status, Custom Name, and Automatic. Feel free to give each status a custom name, however, we strongly discourage changing any status that is considered “Automatic”. These are the statuses that are used automatically during the data collection process. If you do decide to customize the name, we recommend that you use something similar to avoid confusion. You can also add up to five custom statuses at the bottom of the modal.


Status Manager
Default Status
Custom Name
Automatic
Cancelled
Check Sent
Complete
Done
Data Collection Complete
Need Sponsor Signature
Needs Participant Input
Needs Participant Verification
Needs Sponsor Input
Needs Sponsor Verification
Needs TPA Input
Needs TPA Verification
On Hold
Package Sent
Prepare Directive
Sent to Provider (RK/Custodian)
Sent to Trustee
Unable to Process
Verify Account Balance
Custom Status 1
Missing Participant
Close
Save