

## Overview of Release

- Batch Matching Portal User Interface Redesign
- Outcome
- Future Updates

## Release Enhancements

### Batch Matching Portal User Interface Redesign

**Description:** Between August 2019 and March 2021, the Do Not Pay Portal will be undergoing a major redesign based on user feedback. The purpose of this redesign is to improve the ease of navigation and increase the usefulness of the various functions. Currently, Online Search and Batch Matching are the redesigned functionalities. All other functionalities will remain in the legacy Portal until their scheduled upgrade (see Future Updates).

### Redesigned Batch Matching Landing Page

**Announcements**  
Messages will be posted here

**Legacy Portal**  
Click to go to the other modules

**Help**  
Click here for guidance relevant to the page

**Batch Matching**  
Click here to launch

**Export Format**  
Click on the dropdown arrow to choose the file format for exporting results

**View Results**  
Click here to see Payment Results of the chosen file

**Export Results**  
Click here to Open or Save results

**Match Level**  
Clicking on a number will take you to the Payment Results filtered by the corresponding match level of Conclusive, Probable, or Possible.

**Navigation Bar**  
Attempting to click on any icons other than Online Search or Batch Matching will result in a pop-up box directing users to click on the link at the top of the screen to re-direct to the legacy Portal.

| File Name                             | Conclusive | Probable | Possible | Total Records in File | Received Date/Time  | Through Date | Match Date/Time     | Export Results |
|---------------------------------------|------------|----------|----------|-----------------------|---------------------|--------------|---------------------|----------------|
| QA TEST PAYMENT - BATCH - TRACIE V.   | 0          | 31       | 19       | 13                    | 11/13/2019 10:13 AM |              | 09/09/2019 10:33 AM | Export Results |
| QA TEST PAYMENT - BATCH - TRACIE V.   | 280        | 1229     | 150      | 841                   | 09/30/2019 03:11 PM |              | 09/09/2019 04:09 PM | Export Results |
| QA TEST PAYMENT - BATCH - TRACIE V.   | 280        | 1229     | 150      | 841                   | 09/30/2019 03:11 PM |              | 09/09/2019 03:22 PM | Export Results |
| QA TEST PAYMENT - BATCH - TRACIE V.   | 280        | 1229     | 152      | 841                   | 09/30/2019 02:40 PM |              | 09/09/2019 03:03 PM | Export Results |
| QA TEST PAYMENT - BATCH - TRACIE V.   | 280        | 1229     | 153      | 840                   | 09/30/2019 02:09 PM |              | 09/09/2019 02:20 PM | Export Results |
| QA TEST PAYMENT - BATCH - TRACIE V.   | 280        | 1229     | 151      | 840                   | 09/30/2019 01:31 PM | 10/11/2019   | 09/30/2019 01:40 PM | Export Results |
| QA TEST PAYMENT - BATCH 2 - TRACIE V. | 50         | 114      | 30       | 116                   | 09/26/2019 11:19 AM | 10/11/2019   | 09/27/2019 09:41 AM | Export Results |
| QA TEST PAYMENT - BATCH 2 - TRACIE V. | 50         | 114      | 30       | 116                   | 09/26/2019 11:19 AM | 10/10/2019   | 09/26/2019 11:35 AM | Export Results |
| QA TEST PAYMENT - BATCH 2 - TRACIE V. | 50         | 114      | 34       | 116                   | 09/26/2019 10:59 AM | 10/10/2019   | 09/26/2019 11:10 AM | Export Results |
| QA TEST PAYMENT - BATCH 2 - TRACIE V. | 50         | 113      | 27       | 112                   | 09/26/2019 10:26 AM | 10/10/2019   | 09/26/2019 10:45 AM | Export Results |
| QA TEST PAYMENT - BATCH 2 - TRACIE V. | 49         | 113      | 28       | 112                   | 09/25/2019 03:50 PM | 10/10/2019   | 09/25/2019 04:01 PM | Export Results |
| QA TEST PAYMENT - BATCH 2 - TRACIE V. | 50         | 114      | 35       | 116                   | 09/25/2019 03:14 PM | 10/10/2019   | 09/25/2019 03:43 PM | Export Results |

# Release Enhancements (cont.)

## Payment Results Screen

- You can filter your list further by selecting from the dropdown menus for Match Level, Data Source, and Agency Location Code. Multiple selections can be made in each dropdown.
- Click **[View Results]**.

**Batch Matching**  
File Selection > Payment Results

QA TEST PAYMENT - BATCH 2 - TRACIE V.

Matched Records 66      Received Date/Time 09/26/2019 11:19 AM      Through Date 10/10/2019  
 Received Records 116      Match Date/Time 09/26/2019 11:35 AM

Filter [Clear All Filters](#)

**Match Level**  
 Conclusive (39)  
 Probable (110)  
 Possible (21)

**Data Source**  
 DBCK (13)  
 DMF (9)  
 LEIE-PUB (6)  
 OFAC (3)  
 SAM-EXCL-PUB (11)

**Agency Location Code**  
 11010004 (113)

| Agency Location Code | Matches ↓ | Action                       |
|----------------------|-----------|------------------------------|
|                      | 3         | <a href="#">View Results</a> |
|                      | 3         | <a href="#">View Results</a> |
|                      | 3         | <a href="#">View Results</a> |
|                      | 3         | <a href="#">View Results</a> |
|                      | 3         | <a href="#">View Results</a> |
|                      | 3         | <a href="#">View Results</a> |

## Match Details Screen

- The Match Detail screen displays matches based on available data sources. Click anywhere within the data source box to show details. **\*Note:** Match Detail information is now split between the general information displayed at the top of the page and the data source information at the bottom.
- To print or save the details, click **[Print/Save Detail]**.
- To close the details, click **[Hide]**.
- If a record you know represents a proper payment and is continually showing up in match results, you can choose to apply a Whitelist Reason. Select the hyperlinked text in the Whitelist Reason column to do so.

**Batch Matching**  
File Selection > Payment Results > Match Detail

BRUCEWAYNEEE TIN 410235164

Payment Amount \$9,999.00      Schedule # -      Address 1 -  
 Payment Date 12/31/2015      Payment ID -      Address 2 -  
    Payment ID Code -      City -  
    Agency Location 11010004      State -  
    Code      Zip -  
    Agency Account ID -

SAMENT

SAM-EXCL-RES

| Payee                 | SSN/EIN/TIN ↑ | Match Level | Match Type           | DUNS      | Classification | Whitelist Reason     | Whitelist Expiration Date | Detail   |
|-----------------------|---------------|-------------|----------------------|-----------|----------------|----------------------|---------------------------|--|
| BRUCEWAYNEEE410235164 |               | CONCLUSIVE  | TIN + DBA NAME MATCH | 999999884 | INDIVIDUAL     | <a href="#">NONE</a> |                           | <a href="#">Save/Print Detail</a> <a href="#">Hide</a> |

Exclusion Program: NONPROCUREMENT      Agency: HEALTH AND HUMAN SERVICES, DEPARTMENT OF  
 Exclusion Type: PROHIBITION/RESTRICTION      Cage Code:  
 Exclusion Description:      SAM Number: M1TB8ORG2  
 Exclusion Date: INDEF.      Action Date:  
    Create Date: 02/03/1997  
    NPI:

Address 1: 2 CEDAR AVE #84  
 Address 2:

# Release Enhancements (cont.)

## Outcome

**Description:** At the bottom of the Match Detail page is the Outcome section that provides valuable information regarding the resolution of matches. This information helps to measure the effectiveness of the DNP Portal in identifying and preventing improper payments. If you enter this information, it is currently not available in the Portal as a report, but if you would like to receive an ad-hoc report, please contact your Agency Lead or Agency Specialist.

## Future Updates

### Timeline for Functionalities Upgrade to Redesigned Portal

This diagram shows the timeline in which each of the functionalities will be upgraded to the redesigned site, with a completion date by March 2021.

