

Worklist Overview

Worklist Types:

Creating Worklists

Add to an existing Worklist:

To 'remove' items en masse, such as a clean up

Worklist Use Suggestions:

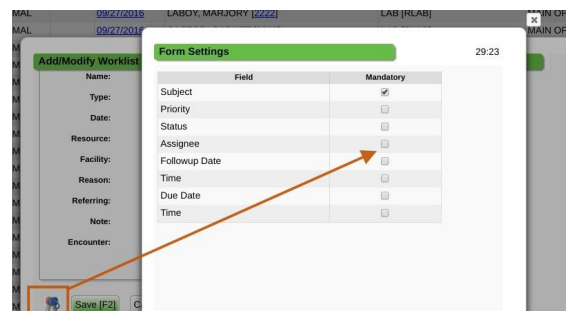
Appointment Worklist Use

Use Worklist from manual Insurance Payment Posting

1
1
1
2
2
3
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Worklist Overview

Use Worklists to organize work by assigning tasks with due dates and/or followup dates. Administrators control what information is required when assigning tasks (such as Priority, Status, Assignee), using the 'Keys'.

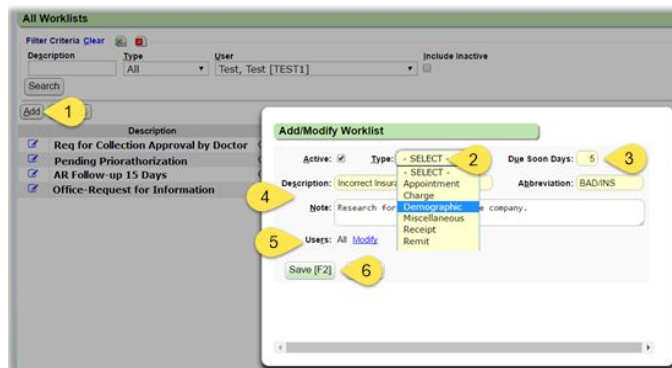


Worklist Types:

- Appointment
- Encounter
- Remit- Includes Remit number and original Note. Updates to the Remit Note will NOT update to the Worklist notes. Remits can be added to this list from the Remit page in ERAs.
- Receipt
- Miscellaneous- not linked to any record - currently you can only assign from the worklist
- Patient
- *Planned enhancements will allow for multiple record types such as Remit & Encounters to be in one worklist*

Creating Worklists

1. On the Worklist page > [Add]
2. Select **Type**
3. Select **Due Soon Days** (to define when items display in the "Due Soon" bucket)
4. Add a **Description** and **Notes** if desired
5. Limit/Assign Users, with the **Modify** link
 - 'Modify Worklist User' > grouped by Security Roles > search to look for a specific user
 - You must give access to persons who *add* and who *work* this list
6. [Save]



Add to an existing Worklist:

There are several places to add to a Worklist. In our example we are adding from the Worklist page

1. [ADD]

2. Subject

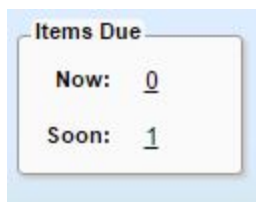
3. Worklist to add to

4. Priority

5. Status

6. Assignee

7. Follow-Up date- shows in the left hand panel



The screenshot shows the 'Worklist Items' page with various filter criteria and a table of items. A blue arrow points from the 'Add' button in the top left to the 'Add/Modify Worklist Item' dialog box. The dialog box has several fields with yellow callouts: 2 (Subject: BCBS Denial - CO16), 3 (Worklist: AR FOLLOW-UP), 4 (Priority: HIGH), 5 (Status: WAITING ON PAYER), 6 (Assignee: Test, Test [TEST1]), 7 (Followup Date), 8 (Due Date), 9 (Encounter: 45446), and 10 (Patient: Test, Test [1493]).

8. Due date: *this

date supersedes a follow-up date

9. Encounter ID or other ID depending on the worklist Type

10. Patient ID or other ID depending on the worklist Type

11. Note

12. [Save]

To 'remove' items en masse, such as a clean up

1. Select all items to update (or use the check-all checkbox)

*Max number update at one time is 1000 records

2. Click [Modify Selected Items]

3. Choose Status 'Complete'

4. Add a Note

5. [Save]

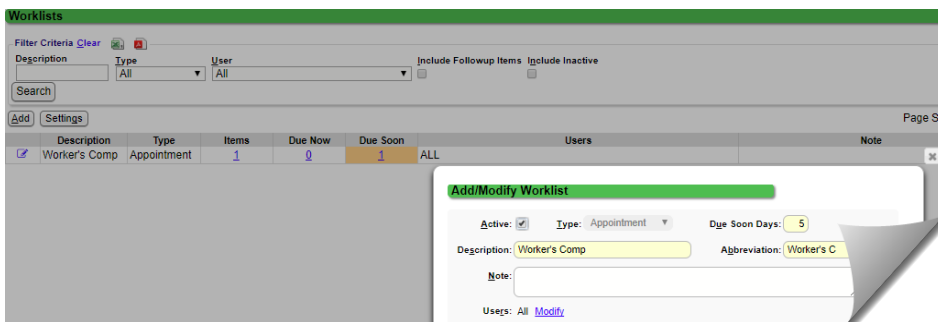
The screenshot shows the 'Worklist Items' page with a list of items. A blue arrow points from the 'Modify Selected Items' button to the 'Modify Multiple Worklist Items' dialog box. The dialog box has several fields with blue callouts: 3 (Status: COMPLETE) and 4 (Note: clean up old list to start fresh). The 'Save [F2]' button is also visible.

Worklist Use Suggestions:

Missed appointment fee (type Appointment)

-added by FD > worklist for Billers to add an encounter for missed appt fee

Examples: Workers Comp claim number required, Authorization missing, or patient missed appointment fee



Eligibility denials (type Patient)

-added by Schedulers, FD, Payer Rejected or Remit denials > for call list to contact the patient and/or review insurance policy and check insurance management for accuracy

Workers Comp (type Patient)

-added by FD or Schedulers or Wk Comp staff > to Wk comp staff to address needs

Authorizations (type Patient)

-added by FD/Scheduler/Billing staff > to authorization staff

Follow up (type encounter)

-added by Admin staff or by Biller to work RCM

ERA Remit Follow up (type Remit)

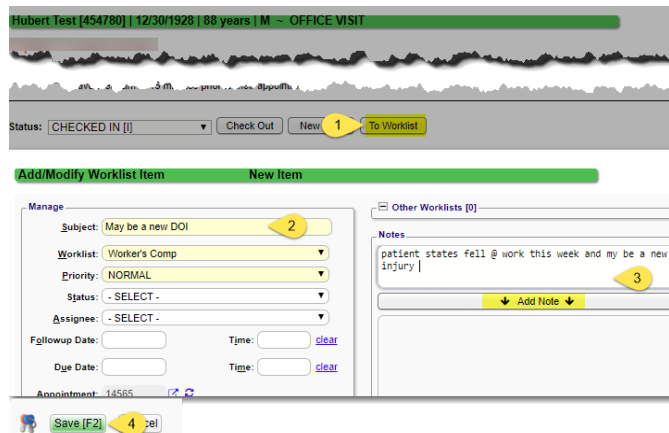
-added by payment posting staff for coder or Admin staff review - ie accept insurance adjudication or resubmit the claims for reconsideration

Appointment Worklist Use

On the appointment page

1. Click [To worklist]
2. Add Subject etc.
3. Add a note > Click 'Add Note'
4. [Save]

A view of the appointment worklist >



Use Worklist from manual Insurance Payment Posting

- Use the 'To Worklist' dropdown
- If you also add a Note - it is added to the Subject of the worklist

In our example, we were posting on Receipt 109148 - the Subject reflects this using the 'Go-Box' shortcut 'R' followed by the Receipt number.

Worklist Items Worker's Comp (Appointment)

Filter Criteria [Clear](#)

Worklist Type: Appointment | Worklist: Worker's Comp (Appointment) | Assignee: | Include Unassigned:

Status: All | Include Closed: | Priority: All | Due From: | Due To: | Due Soon Only: | Followup From: | Followup To: | All Followups:

Patient ID/Name: | Appt Date From: | Appt Date To: | Resource: | Facility: | Subject: |

Item	Assignee	Status	Priority	Subject	Date	Name	Resource	Facility	On List	Due	Followup	Notes	Last Modified
1			NORMAL	May be a new DOI	10/31/2017	TEST, HUBERT [454780]	ABILDGAARD [PJTA]	BEND [1]	0 days	11/05/2017		View	10/31/2017 • 03:12 PM

patient states fell @ work this week and my be a new injury

Worklist Items

Filter Criteria [Clear](#)

Worklist Type: Encounter | Worklist: coding (Encounter)

Status: All | Include Closed: | Priority: All | Due From: |

Post Insurance Payment(s) Receipt: 109148

Receipt	Insurance	Note
109148	MEDICARE [109]	
Received	Check Date	Posted
09/24/2015	09/25/2015	10/26/2017
	Reference	Received
	885074212	1.00
	Escrow	1.00

Post As Insurance: (PRIMARY) MEDICARE [109] | Post As Responsibility: - Default - | Crossed To Secondary:

Patient: 3153 | Encounter: 64954 | Allowed: 0.00 | Paid: 0.00 | CO45: 0.00 | PR3: 0.00 | PR1: 0.00 | PR2: 0.00 | Other: 15.00

DOS	CPT	Charge	Balance	Allowed	Paid	CO45	Copay(PR3)	Deductible(PR1)	Coinsurance(PR2)
08/07/16	36415	15.00	0.00						

All Distributed

Other Code	Other Amount	Note	Balance To
PR204	15.00	CHECK CODING BEFORE SEND	(2) BCBS [107]

To Worklist
coding (Encounter)