

Worklist Overview

I. Worklist Principles

Worklists are tools that provide organized lists of accounts that require work. By ensuring that highest priority accounts are seen first, worklists deliver the greatest value to patients and to the hospital. Overall, worklists organize your work both by prioritization and the combination of critical account information into a single system. Different worklists organize accounts for different functions within a given practice area, ensuring that only accounts relevant to your responsibilities will be presented to you.

- **Accountability**

An account appearing on your worklist is your responsibility; it will leave your worklist only when the necessary activity has been performed. Depending on area, this may include collection of the minimum data set (MDS), insurance verification, self-pay follow-up or authorization work required for that patient. Additionally, an account may be appropriately transferred to another worklist. This principle also applies to all accounts on the worklists of your co-workers.

- **Follow-Up/Tickling**

One function of a worklist is to act as a “tickler tool,” allowing you to manage the required activity on accounts until they are secure. You can assign a specific date on which you want to follow-up on an account. Under these conditions, the in-process account will be removed from your worklist until the given date it was told to reappear.

- **Measurement**

The work that you complete on an account will be regularly measured and defined by status codes. This process allows tracking of your successes and identification of areas for improvement. The measurements will be used to shape your training, goals, quality reviews, and expectations, as well as those of the team.

- **Prioritization**

Accounts are organized on your worklist in a process that assists you in prioritizing your daily work. Effective prioritization of your accounts will enable you to meet higher productivity standards and financially secure a greater number of accounts.

- **Box Logic**

The summary pages of each worklist use box logic to display the Worklist Fields that require action. Fields with blue boxes indicate that necessary work has been completed, and red boxes indicate that additional work is required. In order to complete work on an account and eliminate red boxes, click on the box to access the Detail page. Complete the required work and select the appropriate status code from the list for that field, then click “Update” to save your progress.

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Worklist Overview

- **Exceptions**

Exceptions cause accounts to reappear on a worklist after they have been secured, or flag particular accounts in different situations to draw attention to them. Some exception types require specific action steps.

- **Transfers**

ONTRAC® accounts can exist on more than one worklist at a time and/or be transferred between teams and units. To transfer an account to another worklist, select the appropriate worklist from the “Transfer” pull-down menu and click “Update.” Using this same process, other teams and units may transfer an account to your worklist.

- **Add Account**

The Add Account functionality is used when you work an account that is not on your worklist. Example situations when you would need to use the Add Account functionality include:

- Receiving credit for work on a non-scheduled account that has not appeared on your worklist
- Receiving credit for work completed on an account that is not on your worklist due to tickling
- Addition of an account to your worklist that you need to work

To add an account, click on the underlined “Add New Account” link at the top of the worklist page. Complete the Visit Number, Visit Date, and Visit Time fields and click “Search” to look for the account in ONTRAC®. If the account is not found, select the appropriate values for the work you have completed on the account and click “Submit”.

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Worklist Overview

II. Worklist Functionality

Several tools have been provided to assist you in navigating through the worklists. Each of the worklist pages include the following tools at the top of the page:

- **Search Accounts** – This feature locates a specific account or accounts that meet selected criteria. You may use any of the following, or a combination of these criteria, to search for accounts: Last Name, Visit Number, and Medical Record Number. The results will appear on a summary page. Click the “Detail” link to view detailed account information and status.
- **Add New Account** – You may use this feature to record work completed on an account that is not on your specific worklist. You may enter a value for the following activities: Auth, AptR, PR, Pt Liab Collected (AU), SP, IV, Pt Liab Collected (Check-In), and CoPay Collected (Check-In). Select the appropriate value for the work you have completed and click the “Submit” button.
- **Remove Filters** – This function removes any filters that had been activated in a worklist. For a detailed explanation of filters, please see page 4.
- **Assigned Worklists** – Select your assigned worklists from this pull-down menu.
- **Date** – This function allows you to view accounts on the Check-In worklist with a specific date of service by selecting the desired date from the pull-down menu.
- **Other Worklists** – You may select and view other worklists that are not assigned to you from this pull-down menu.

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Worklist Overview

Additionally, the individual worklists contain the following tools:

- **Search Worklist** – This function is available once a worklist has been selected. The search worklist function will find all accounts in the given worklist that contain a specific value. The search is not case sensitive; however, the specific formatting for the field must be followed. You can search on the following fields:
 - Priority – Priority number given to account, i.e. 1, 2, 3
 - Exc. – Exception code, i.e. RP, CP
 - Med Rec – The 8 digit medical record number
 - Visit Number – The 7 digit visit number
 - Apt. Type – The appointment type code, i.e. F15, N15
 - Patient Name – Last Name,First Name Middle Name/Initial (Middle name/initial is not always necessary, depending on patient)
 - Physician - Last Name,First Name Middle Name/Initial MD (Middle name/initial is not always necessary, depending on physician)
 - Visit Date – MM/DD/YYYY
 - Pri. Plan Name – Name of primary insurance plan
 - Sec. Plan Name – Name of secondary insurance plan
 - Auth Num – Authorization number
 - Visit Reason – Specific visit reason noted in account
 - Tickle Date – MM/DD/YYYY

Additionally, the percent sign (%) can be used as a wildcard during a search. For example, a search for “smi%” within the Patient Name field will find all patients whose last name begins with “smi.”

- **Sort** – Accounts on your worklist may be sorted according to any of the underlined column headings. Click on the column heading to sort the accounts. An arrow will appear underneath the selected heading to indicate the variable by which the accounts are sorted. The information will be sorted in ascending order. To sort in descending order, click on the underlined column heading again.
- **Filter** – Filters may be used to locate specific accounts that meet criteria you select. To activate a filter, click on any field that contains the criterion you wish to use. All accounts that contain the same value in that field will be displayed on the results page. For example, if you click on “PED” in the Clinic column, only accounts containing a value of “PED” in the Clinic column would be displayed. A small filter icon will appear under the column heading to indicate the field by which the accounts are filtered. To remove the filter, click on the “Remove Filters” link at the top of the page.

When a worklist is selected, the summary page will be displayed first. This page lists all of the accounts for that worklist. By clicking on any of the blue or red activity code field boxes, the detail page for the account will be displayed. Update the detail page to reflect work you have completed, and click “Update” to save the changes.

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Worklist Overview

III. Worklist Detail Page

The following information is provided on an *Access Unit* worklist (detail page) for each account:

Visit Activity:

- IV Status – Status of insurance verification for this account
- PR Status – Status of pre-registration for this account
- SP Status – Status of self-pay follow-up for this account
- Complete Status – Account completion status
- Other Pt Liab Collected (AU) – Patient liability collected by Access Unit
- Share WL – Use to share account with another worklist
- Tickle Date – Allows account to reappear at a future date
- Transfer WL – Transfers account to another worklist
- Note

Account Information:

- Patient Name
- Visit Number
- MRN – Medical Record Number
- SSN – Patient's social security number
- DOB – Patient's date of birth
- Age – Patient Age
- Guarantor – Guarantor of account
- Language – Patient Language
- Home Phone
- Work Phone
- Pref Phone – Patient's preferred phone number
- Employer – Patient's employer

Sponsorship Information:

- Last MDS Date – Date minimum data set was last collected
- Last Verif Date Primary – Date primary insurance eligibility and benefits were last verified
- Auth Status – Status of authorization work
- Last Verif Date Secondary – Date secondary insurance eligibility and benefits were verified
- AptR Status – Status of appointment rescheduling work
- Exceptions – Indicates changes in account that may require follow-up

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Worklist Overview

Visit Information:

- Practice Area
- Location
- Appt Time – Appointment time
- Appt Status – Appointment status
- Visit Reason – Reason for visit
- Sch Comment – Scheduling Comment
- Pt Liab Exp – Expected patient liability for visit (as documented in FSC follow-up questions)

Insurance Information:

- Primary – Name of primary insurance carrier
- Policy # – Policy number of primary insurance carrier
- Group # – Group number of primary insurance carrier
- Medi-Cal EVC N# – Medi-Cal eligibility number for primary insurance (if applicable)
- Claims Phone – Phone number of primary insurance carrier
- HDX Eligibility
- Secondary – Name of secondary insurance carrier
- Policy # – Policy number of secondary insurance carrier
- Group # – Group number of secondary insurance carrier
- Medi-Cal EVC # – Medi-Cal eligibility number for secondary insurance (if applicable)
- Claims Phone – Phone number of secondary insurance carrier

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Worklist Overview

The following information is provided on an *Authorization* worklist (detail page) for each account:

Visit Activity:

- Auth Status – Status of authorization for this account
- Complete Status – Account completion status
- Share WL – Use to share account with another worklist
- Tickle Date – Allows account to reappear at a future date
- Transfer WL – Transfers account to another worklist
- Note

Account Information:

- Patient Name
- Patient Phone
- Visit Number
- MRN – Medical Record Number
- SSN – Patient’s social security number
- DOB
- Guarantor

Sponsorship Information:

- Last MDS Date – Date minimum data set was last collected
- Last Verif Date – Date insurance eligibility and benefits were last verified
- PR Status – Status of pre-registration work
- IV Status – Status of insurance verification work
- SP Status – Status of self pay follow-up work
- AptR Status – Status of appointment rescheduling work
- Exceptions – Indicates changes in account that may require follow-up

Visit Information:

- Practice Area
- Location
- Physician
- Appt Time – Appointment time
- Appt Status – Appointment status
- Apt. Type
- Visit Reason
- Sch Comment
- Auth Number

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Worklist Overview

Insurance Information:

- Primary – Name of primary insurance carrier
- Policy # – Policy number of primary insurance carrier
- Group # – Group number of primary insurance carrier
- Medi-Cal EVC # – Medi-Cal eligibility number for primary insurance (if applicable)
- UR Phone – Phone number of primary insurance carrier
- Secondary – Name of secondary insurance carrier
- Policy # – Policy number of secondary insurance carrier
- Group # – Group number of secondary insurance carrier
- Medi-Cal EVC # – Medi-Cal eligibility number for secondary insurance (if applicable)
- UR Phone – Phone number of secondary insurance carrier

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The following information is provided on an *At-Risk* worklist for each account:

- Visit Note
- AptR Status – Status of appointment rescheduling work
- Service Provider
- Patient Name
- Visit Number
- Appt Type
- Plan Name
- Auth – Status of authorization work
- IV – Status of insurance verification work
- PR – Status of pre-registration work
- SP – Status of self pay follow-up work
- Visit Date
- Special Need

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Worklist Overview

The following information is provided on an *Appointment Rescheduling* worklist (detail page) for each account:

Visit Activity:

- AptR Status – Status of appointment rescheduling
- Share WL – Allows sharing of account with another worklist
- Tickle Date – Allows account to reappear at a future date
- Transfer WL – Transfers account to another worklist
- Note

Account Information:

- Patient Name
- Visit Number
- MRN – Medical Record Number
- SSN – Patient’s social security number
- DOB – Patient’s date of birth
- Age – Patient’s Age
- Guarantor
- Language
- Home Phone
- Work Phone
- Pref Phone – Preferred phone number
- Employer

Sponsorship Information:

- PM Decision – Decision of practice manager/supervisor
- Auth Status – Status of authorization work
- IV Status – Status of insurance verification work
- PR Status – Status of pre-registration work
- SP Status – Status of self pay follow-up work
- Exceptions – Indicates changes in account that may require follow-up

Visit Information:

- Practice Area
- Location
- Appt Time – Appointment time
- Appt Status – Appointment status
- Visit Reason
- Sch Comment – Scheduling Comments
- Pt Liab Expected – Expected patient liability for visit (as documented in FSC follow-up questions)
- Service Provider

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Worklist Overview

Insurance Information:

- Primary – Name of primary insurance carrier
- Policy # – Policy number of primary insurance carrier
- Group # – Group number of primary insurance carrier
- Medi-Cal EVC # – Medi-Cal eligibility number for primary insurance (if applicable)
- Secondary Carrier – Name of secondary insurance carrier
- Policy # – Policy number of secondary insurance carrier
- Group # – Group number of secondary insurance carrier
- Medi-Cal EVC # – Medi-Cal eligibility number for secondary insurance (if applicable)

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Worklist Overview

The following information is provided on a *Check-In* worklist (detail page) for each account:

Visit Activity:

- CoPay Collected (Check-in) – Amount of co-payment collected at check-in
- Other Pt Liab Collected (Check-In) – Amount of deposit/liability collected at check- in
- Checked In – Check In status
- Note – open text field shared by Access Unit, Authorization and Check-In worklists

Account Information:

- Patient Name
- Visit Number
- MRN – Medical Record Number
- SSN – Patient’s social security number
- DOB – Patient’s date of birth
- Age – Patient Age
- Employer
- Language
- Home Phone
- Address Line 1
- Work Phone
- Address Line 2

Sponsorship Information:

- MSPQ – Indicates if a Medicare Secondary Payer Questionnaire is required for this visit
- T&C – Indicates if a Terms & Conditions of Admission form is required for this visit
- AptR Status – Status of appointment rescheduling work
- PR Status – Status of pre-registration work
- IV Status – Status of insurance verification work
- SP Status – Status of self pay follow-up work
- Auth Status – Status of authorization work
- Exceptions – Indicates changes in account that may require follow-up

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Worklist Overview

Visit Information:

- Practice Area
- Location
- Physician
- Pt. Liab Exp (as documented in FSC follow-up questions)
- Appt Time – Appointment time
- Appt Status – Appointment status
- Visit Reason
- Sch Comment – Scheduling Comments
- Accident/Injury – If the visit is related to an accident or injury
- Date of Injury

Insurance Information:

- Primary Carrier – Name of primary insurance carrier
- Policy # – Policy number of primary insurance carrier
- Group # – Group number of primary insurance carrier
- Medi-Cal EVC # – Medi-Cal eligibility number for primary insurance (if applicable)
- Phone – Phone number of primary insurance carrier
- Secondary Carrier – Name of secondary insurance carrier
- Policy # – Policy number of secondary insurance carrier
- Group # – Group number of secondary insurance carrier
- Medi-Cal EVC # – Medi-Cal eligibility number for secondary insurance (if applicable)
- Phone – Phone number of secondary insurance carrier

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