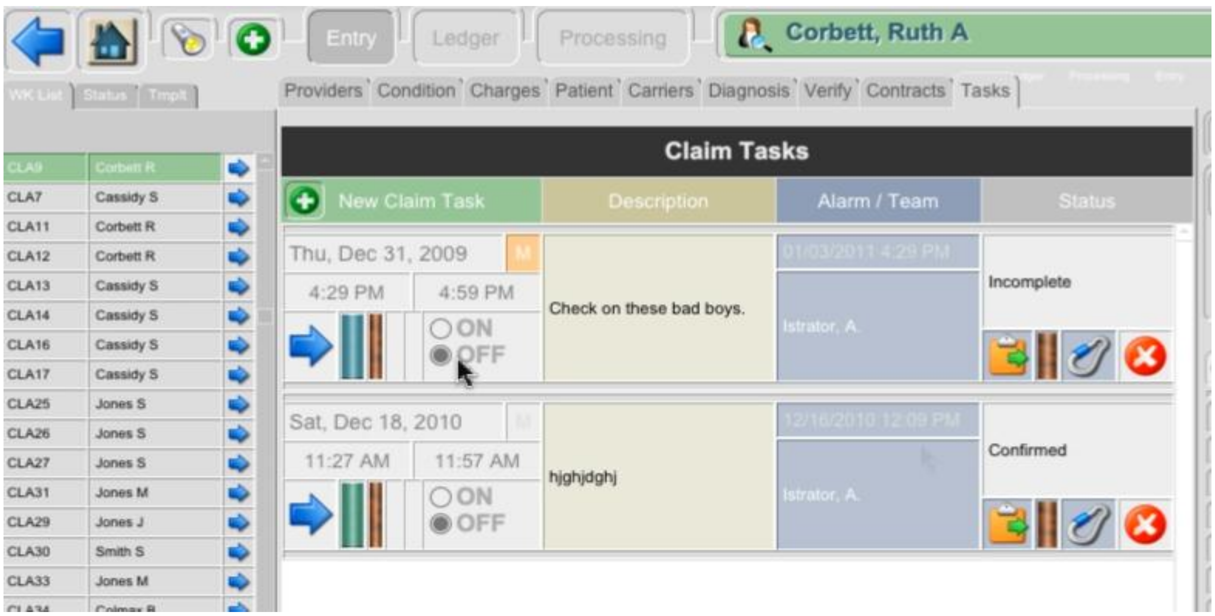
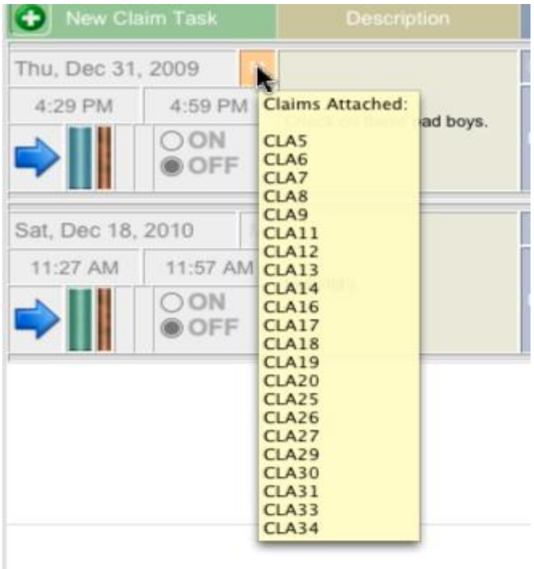
Claim Tasks

In this section, we look at claim tasks. Differentiating itself from the work list approach, claim tasks are more flexible and can be set to alert team members on log in, or any point where they return to the Main menu.

Under the **Entry** section, on the **Tasks** tab, you will see any task events that are attached to a specific claim. There may be more than one in some situations. For example, in the screen shot below we have two different tasks.

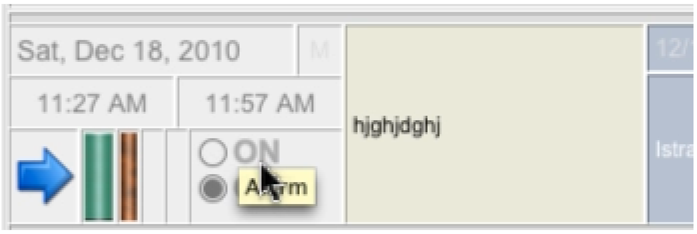


Some have an "**M**" that's highlighted with an orange color around it, indicating that there are multiple claims attached to this same event.

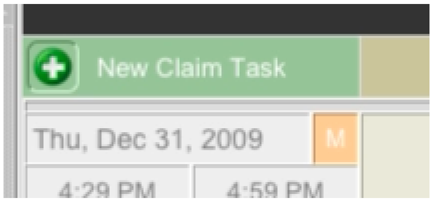


- If there are multiple team members attached, you can choose to detach yourself, or you can also link yourself to an event.

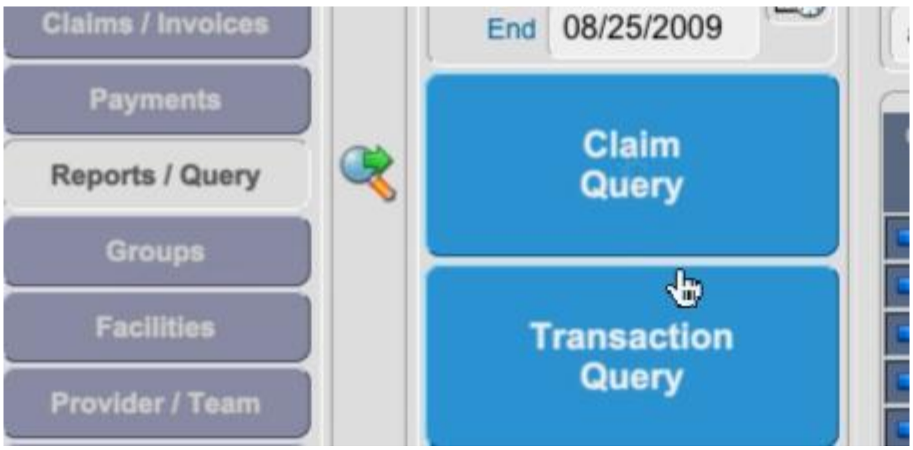
- You have the option to turn on or off the alarm for a given task, or you can navigate directly to the task by clicking the blue arrow.



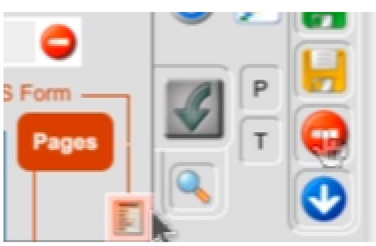
- In this case, we are not going to create a task just for this one claim. However, you could accomplish that by clicking on a the green plus icon labeled "New Claim Task".



- So we'll begin by going into the **Reports/Query** menu and selecting the **Claim Query**.

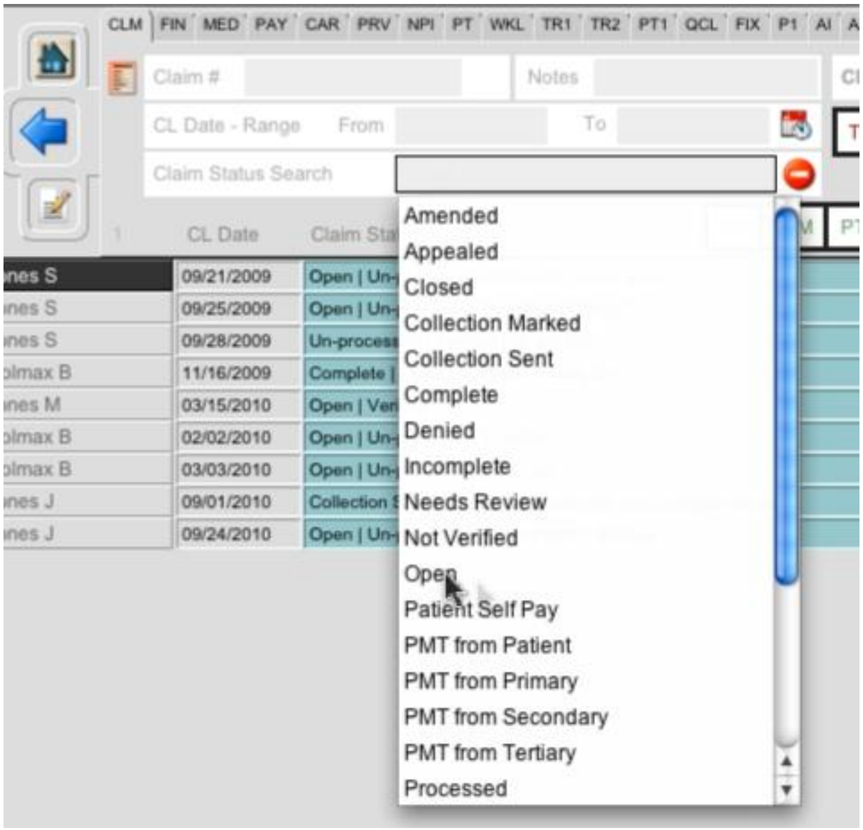


- Always begin by clearing the query by clicking on the red minus button on the right of your screen.

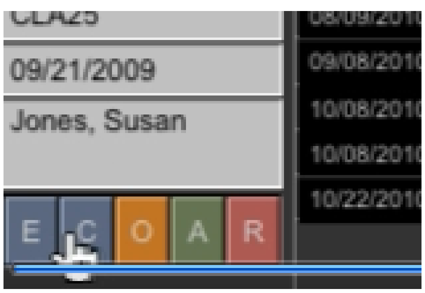


- Let's say Tricare claims have something that need to be examined in them. So we want to create a task for those claims by going to the **CAR** tab and typing "Tricare" into the "Pri Name" field.

- We also want to narrow the claims down to only claims which were open. We will reset the query, go to the “Claim Status Search” on the **CLM** tab and set the Claim Status to “Open” claims only.

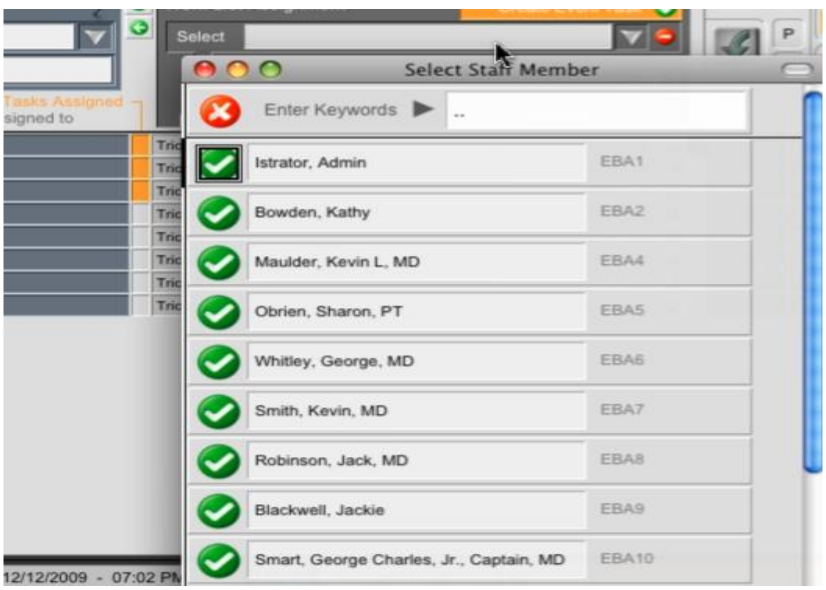


Next, we will constrain this found set by clicking the ‘**C**’ button to “Confine” our found set to claims with an “Open” status.

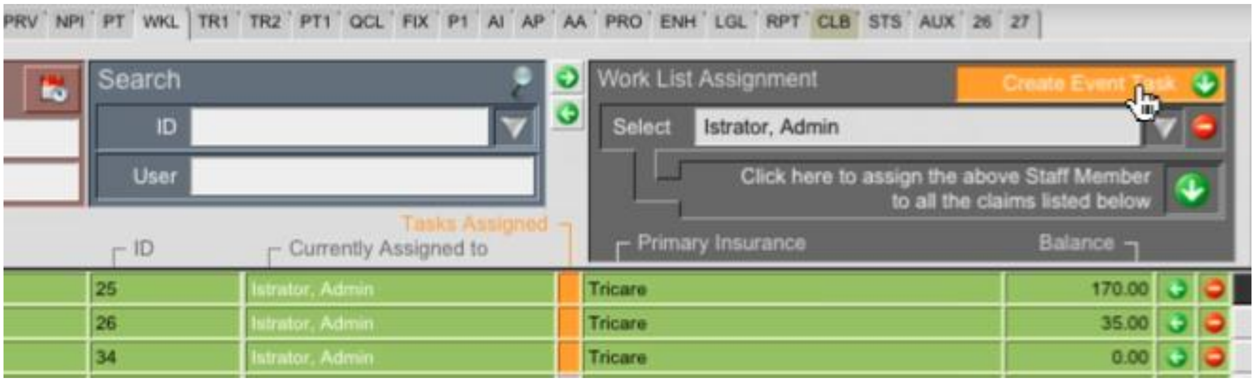


- So now we have a set of claims which have Tricare as the primary carrier and are open claims. From here we go to the **WKL** tab. Some of these claims already have a task attached to them. You will see that with an orange highlight indicating tasks already assigned. As you select them, you will see the task in the lower right.

- We begin by selecting a provider team member to attach the claims to.



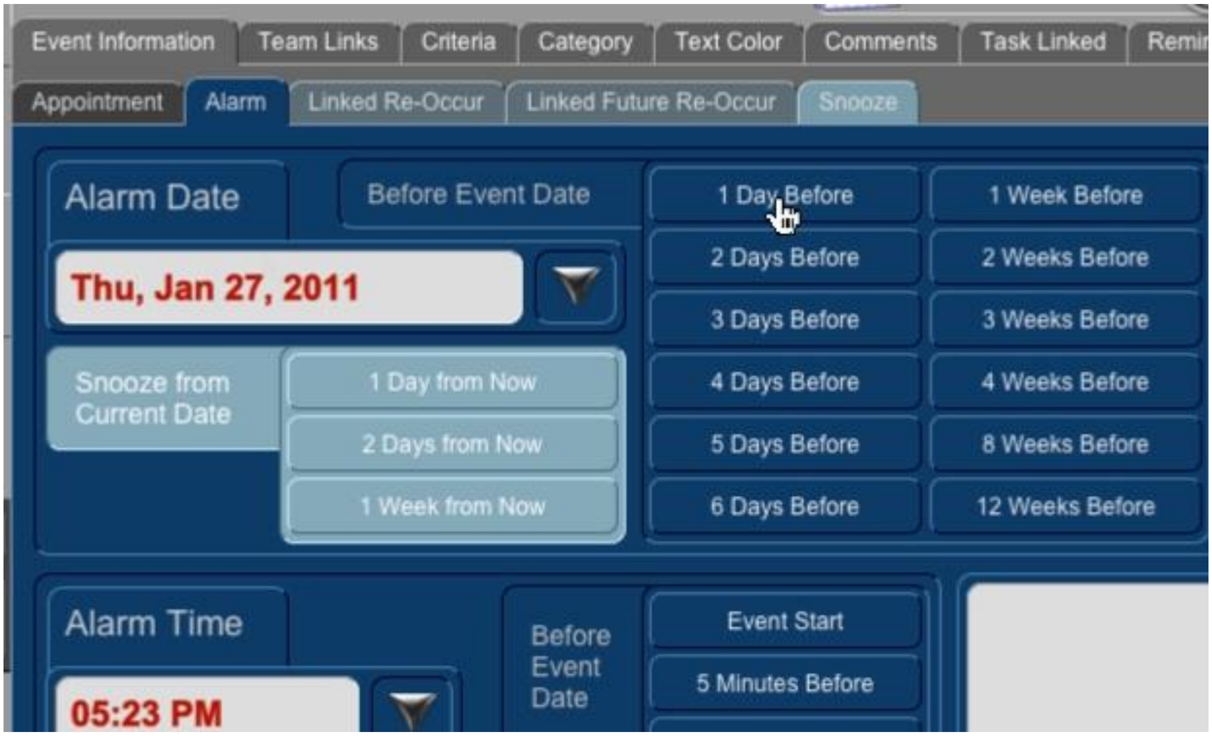
- Then we click on the “Create Event Task” button.



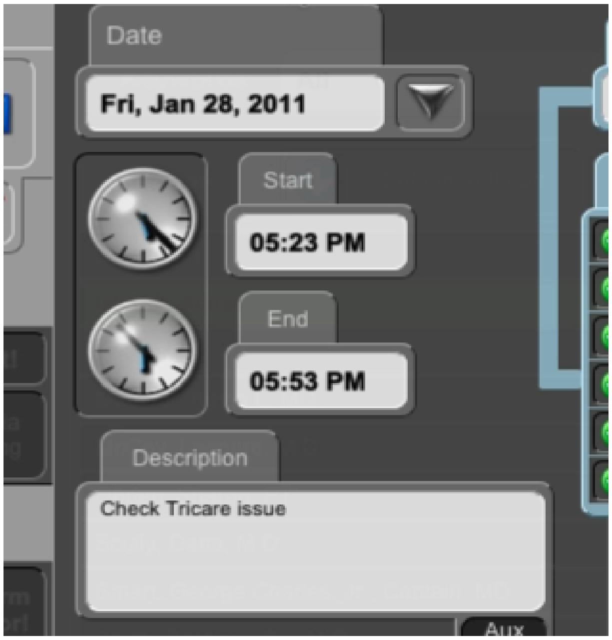
- This button creates a new event with the current date that has those claims attached to it.

- Let's say this task needs to be accomplished by the 28th.

- Let's set the alarm for one day prior to the event. So we'll click on "1 Day Before".

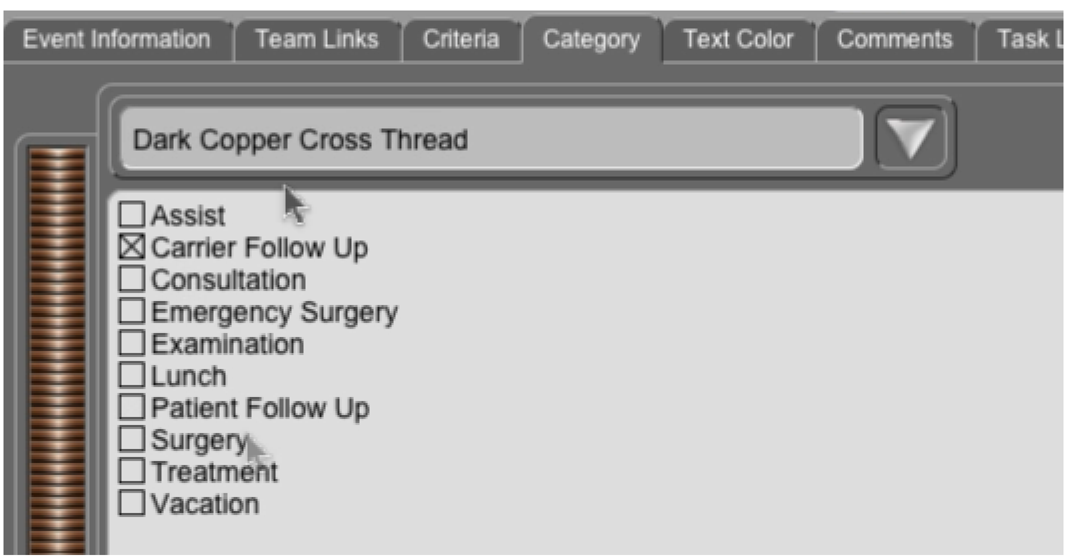


- Enter a description for this task. For example, "Check Tricare issue".

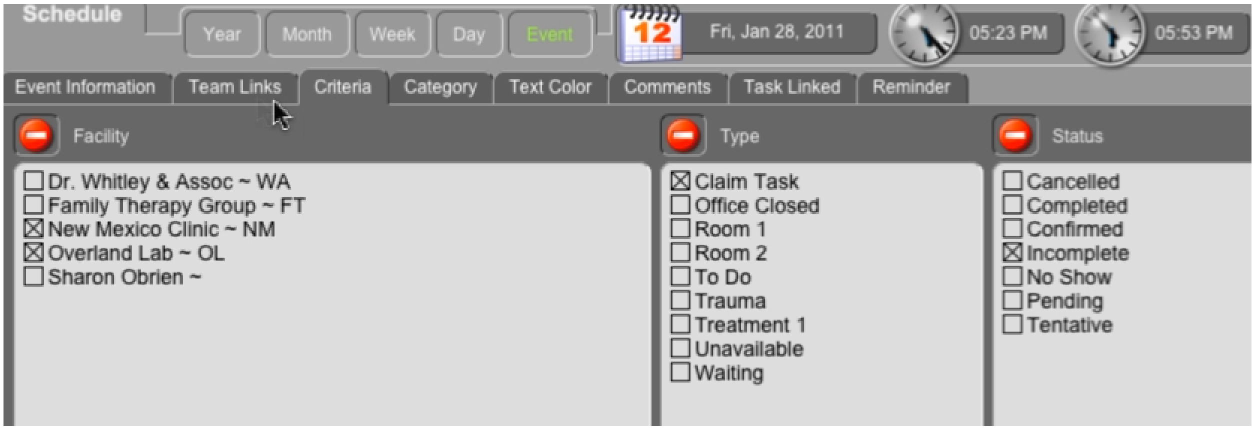


- Now we can attach the provider team members we wish to this list. For this purpose, we leave the provider team member set to “Administrator” we are currently logged in as. However, you could attach one or multiple team members to this task.

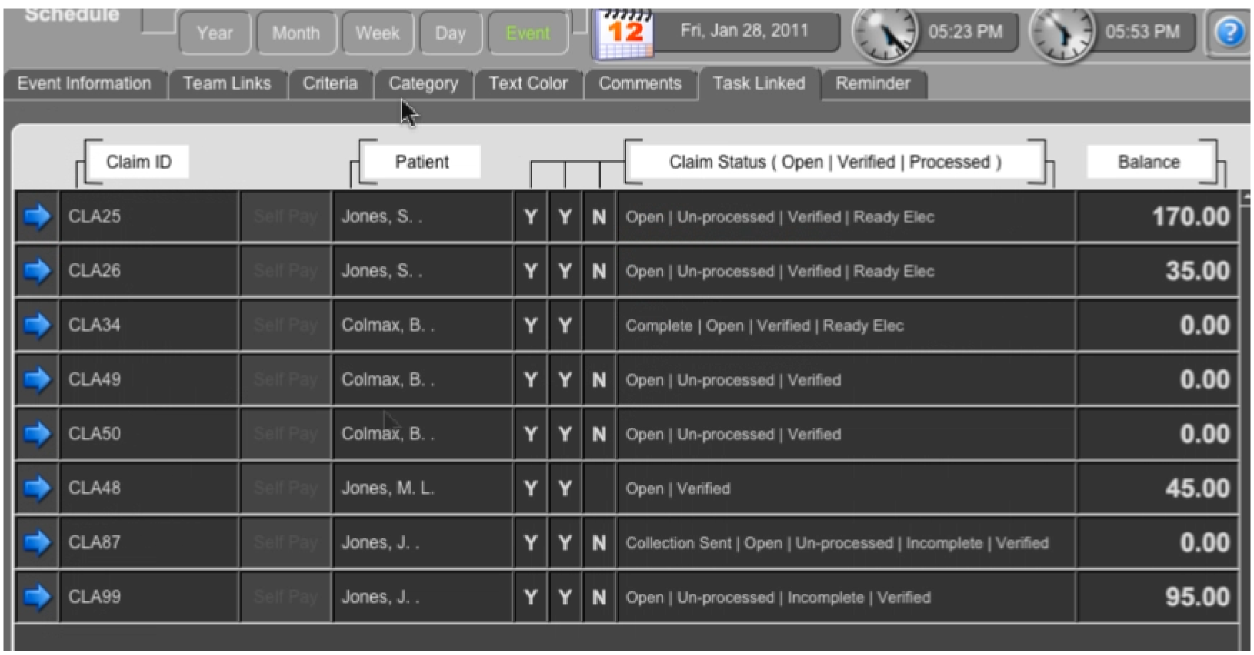
- Let’s say we need a “Carrier Follow Up”.



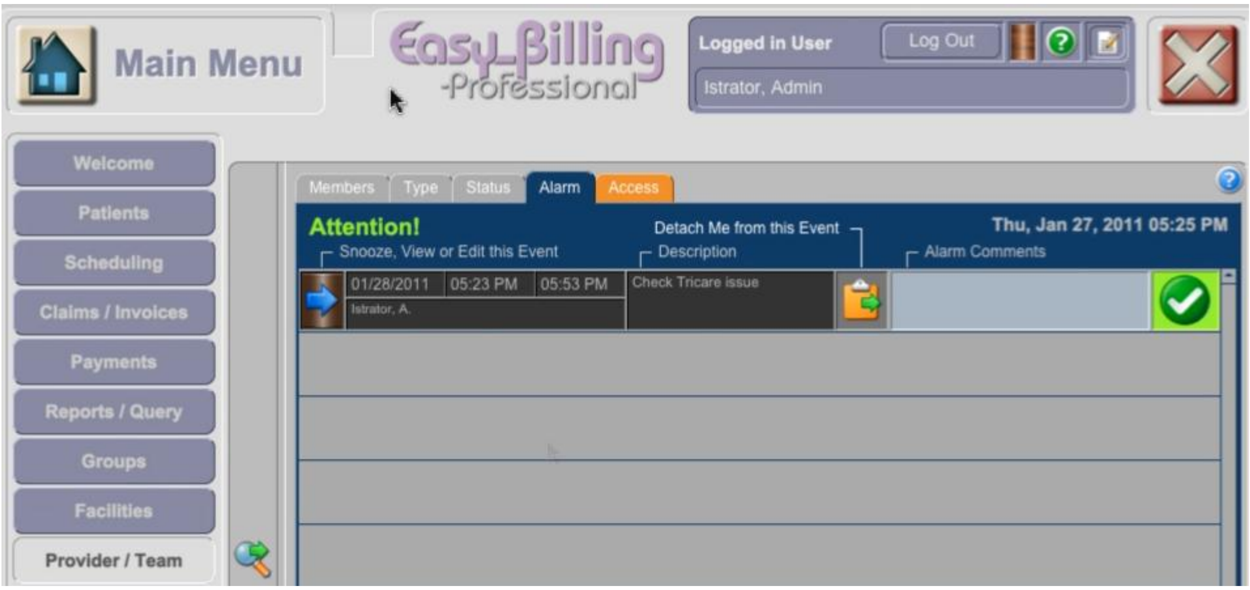
- The Type is already set to a “Claim Task”. The “Status” defaults to “Incomplete” based on our task preferences. These criteria will be set when a claim task is created.



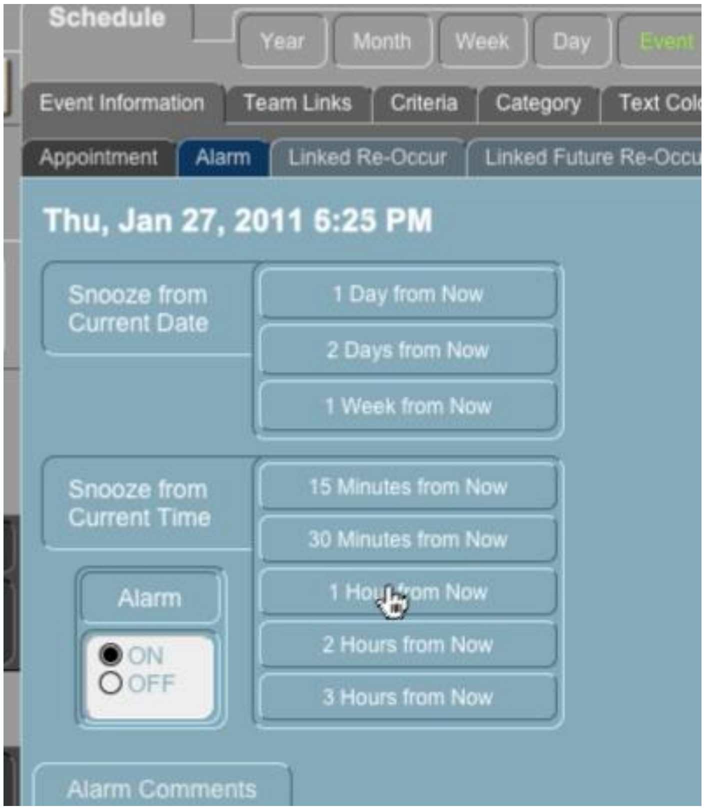
- We now see a list here of all or our claims which are attached to this task.



When the user logs in, our returns to the main menu, they will be warned that they have a claim task that they need to follow up on. They can detach from the event, or snooze the alarm.



You can set the snooze for this alarm to an hour from now. Then when you return to the main menu, the warning will no longer be there.



Let's say we want to look at that claim task. If we click on the **Scheduling** menu, if the date range is set to the date of the event, all those events will be listed here.

Click on the event to look at that specific event. We see the claim task that we just created and the claims associated with it.

At any point, you can navigate directly to that claim. So you can edit those claims, correct as you need and then return to the list.