

Claim Tasks



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.

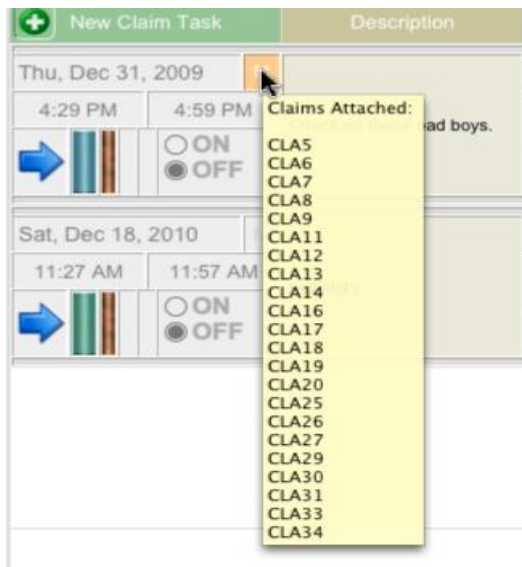
Under the **Entry** section, on the **Tasks** tab, you will see any task events that are attached to a specific claim. There may be more than one in some situations. For example, in the screen shot below we have two different tasks.

Wk List	Status	Temp	Providers	Condition	Charges	Patient	Carriers	Diagnosis	Verify	Contracts	Tasks
CLA9	Corbett R										
CLA7	Cassidy S										
CLA11	Corbett R										
CLA12	Corbett R										
CLA13	Cassidy S										
CLA14	Cassidy S										
CLA16	Cassidy S										
CLA17	Cassidy S										
CLA25	Jones S										
CLA26	Jones S										
CLA27	Jones S										
CLA31	Jones M										
CLA29	Jones J										
CLA30	Smith S										
CLA33	Jones M										
CLA34	Palmer R										

Claim Tasks			
New Claim Task	Description	Alarm / Team	Status
Thu, Dec 31, 2009	Check on these bad boys.	01/03/2011 4:29 PM Istrator, A.	Incomplete
4:29 PM - 4:59 PM			
<input type="radio"/> ON <input checked="" type="radio"/> OFF			
Sat, Dec 18, 2010	hghjdghj	12/16/2010 12:09 PM Istrator, A.	Confirmed
11:27 AM - 11:57 AM			
<input type="radio"/> ON <input checked="" type="radio"/> OFF			

Claim Tasks

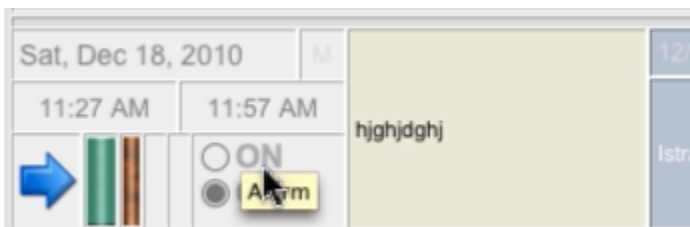
Some have an “M” that’s highlighted with an orange color around it, indicating that there are multiple claims attached to this same event.



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

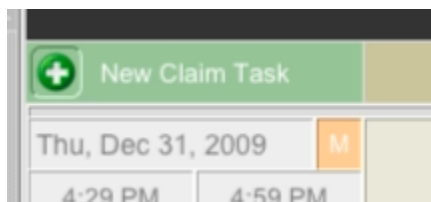


- You have the option to turn on or off the alarm for a given task, or you can navigate directly to the task by clicking the blue arrow.

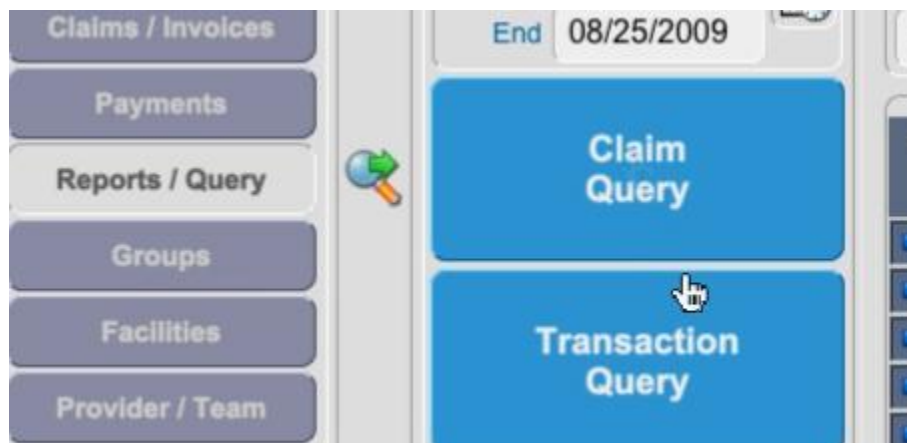


Claim Tasks

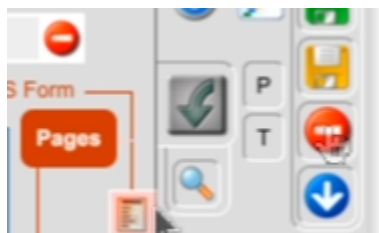
- In this case, we are not going to create a task just for this one claim. However, you could accomplish that by clicking on a the green plus icon labeled “New Claim Task”.



- 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.

Claim Tasks

CLM FIN MED PAY CAR PRV NPI PT WKL TR1 TR2 PT1 QCL FIX P1 AI AP AA PRO EN

Self Pay ON

Pri ID Sec ID

Pri Name Tricare Sec Name

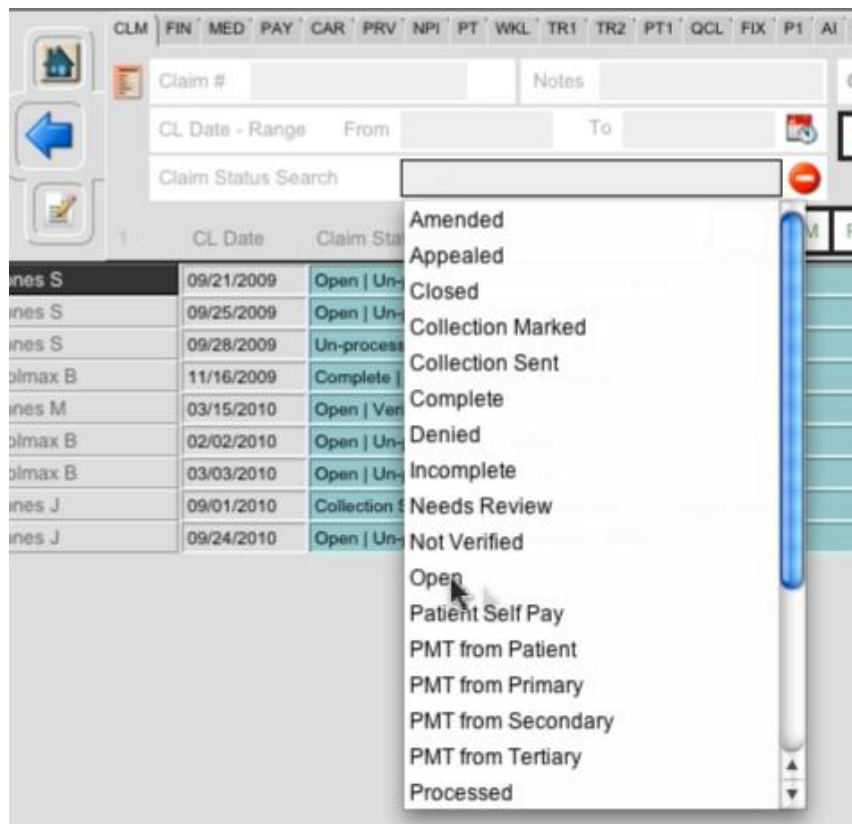
Crossover ON

Insurance Status OP OS OT

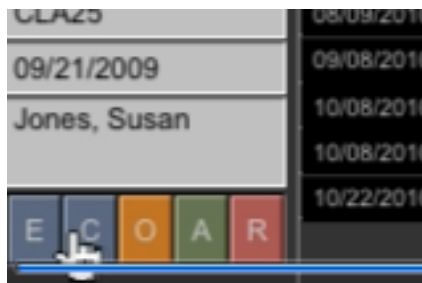
N	P	Tricare	
N	P	Tricare	
N	P	Tricare	
N	P	Tricare	
N	P	Tricare Healthcare Alliance	
N	P	Tricare	
N	P	Tricare	
N	P	Tricare	Tricare
N	P	Tricare	Tricare

- 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.

Claim Tasks



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.

Claim Tasks

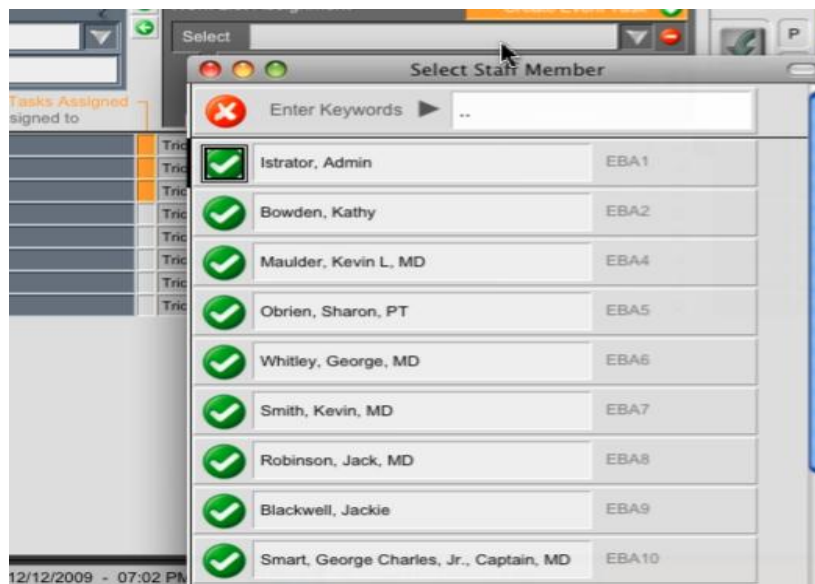
	Date Assigned	ID	Currently Assigned to	Primary Insurance	Balance				
es S	Mon, Jan 17, 2011	25	Istrator, Admin	Tricare	170.00	+	-	CL 0	TR 0
es S	Mon, Jan 17, 2011	26	Istrator, Admin	Tricare	35.00	+	-	CL 0	TR 0
max B	Mon, Jan 17, 2011	34	Istrator, Admin	Tricare	0.00	+	-	CL 0	TR 0
es M	Mon, Jan 17, 2011	48	Istrator, Admin	Tricare Healthcare Alliance	45.00	+	-	CL 0	TR 0
max B	Mon, Jan 17, 2011	49	Istrator, Admin	Tricare	0.00	+	-	CL 0	TR 0
max B	Mon, Jan 17, 2011	50	Istrator, Admin	Tricare	0.00	+	-	CL 0	TR 0
es J	Mon, Jan 17, 2011	87	Istrator, Admin	Tricare	0.00	+	-	CL 0	TR 0
es J	Mon, Jan 17, 2011	99	Istrator, Admin	Tricare	95.00	+	-	CL 0	TR 0

Created by	Istrator, Admin	12/12/2009 - 07:02 PM
Last Modified by	Istrator, Admin	01/17/2011 - 10:25 AM
Verified by		

Thu, Dec 31, 2009 04:29 PM
Istrator, A. Check on these bad boys.

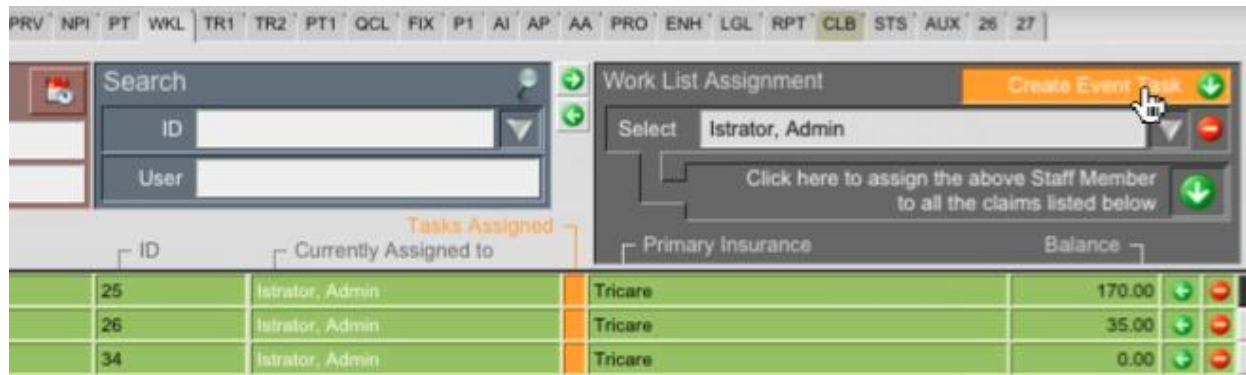
Tasks Attached

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



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

Claim Tasks



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



Claim Tasks

Schedule

Year Month Week Day **Event** 12 Thu, Jan 27, 2011 05:23 PM 05:53 PM

Event Information Team Links Criteria Category Text Color Comments Task Linked Reminder

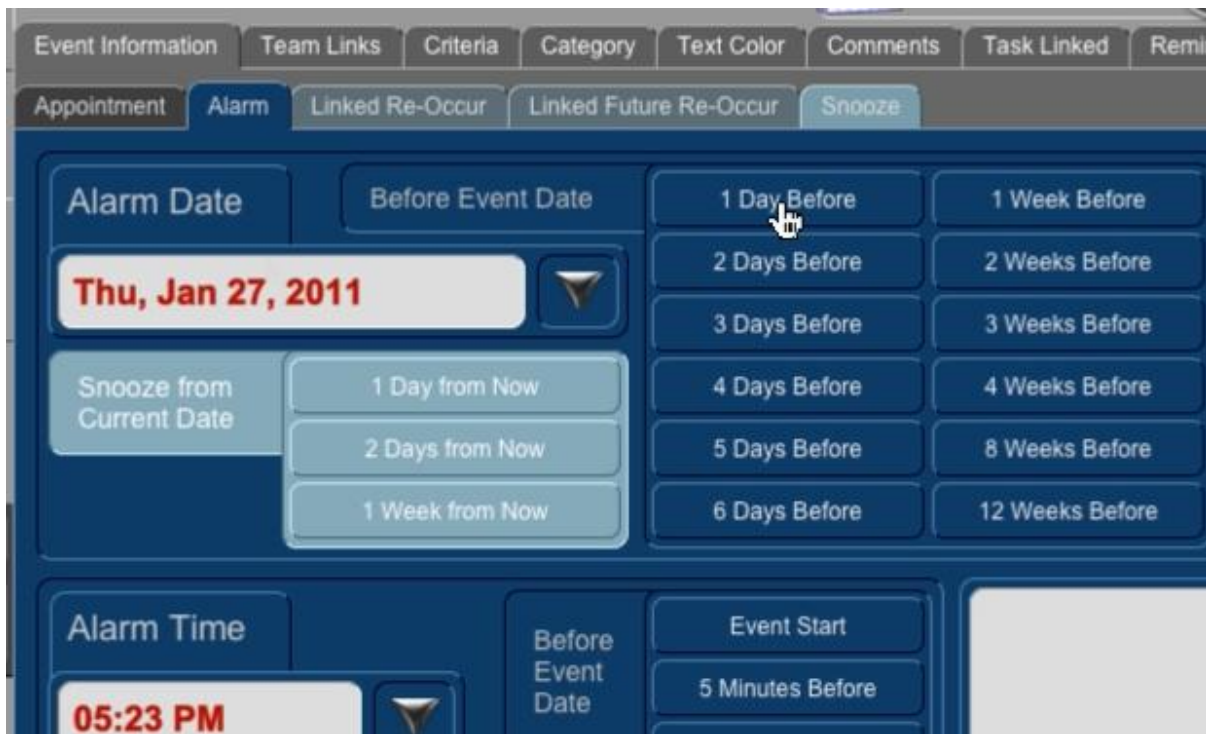
Claim ID	Patient	Claim Status (Open Verified Processed)	Balance
→ CLA25	Self Pay Jones, S. .	Y Y N Open Un-processed Verified Ready Elec	170.00
→ CLA26	Self Pay Jones, S. .	Y Y N Open Un-processed Verified Ready Elec	35.00
→ CLA34	Self Pay Colmax, B. .	Y Y Complete Open Verified Ready Elec	0.00
→ CLA49	Self Pay Colmax, B. .	Y Y N Open Un-processed Verified	0.00
→ CLA50	Self Pay Colmax, B. .	Y Y N Open Un-processed Verified	0.00
→ CLA48	Self Pay Jones, M. L.	Y Y Open Verified	45.00
→ CLA87	Self Pay Jones, J. .	Y Y N Collection Sent Open Un-processed Incomplete Verified	0.00
→ CLA99	Self Pay Jones, J. .	Y Y N Open Un-processed Incomplete Verified	95.00

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

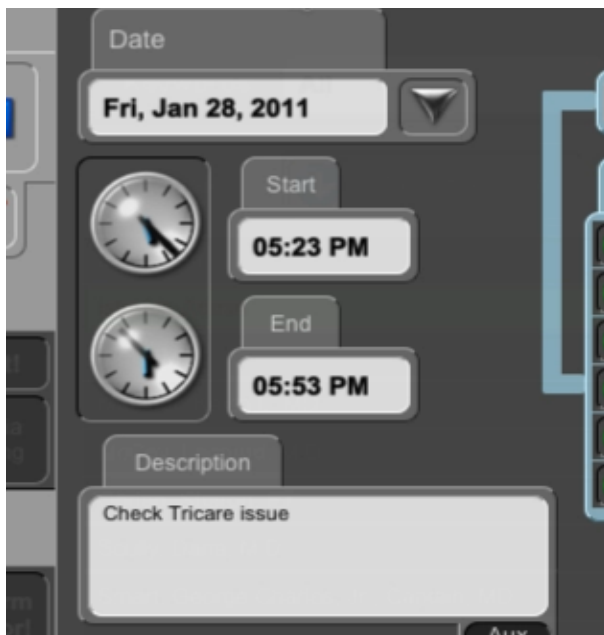


Claim Tasks

- 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".

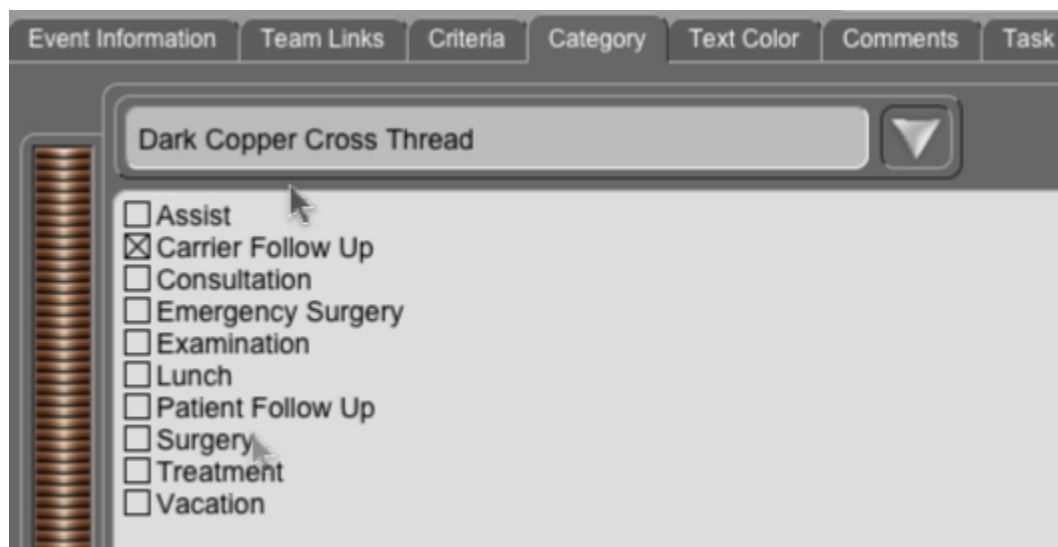


Claim Tasks

- 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.

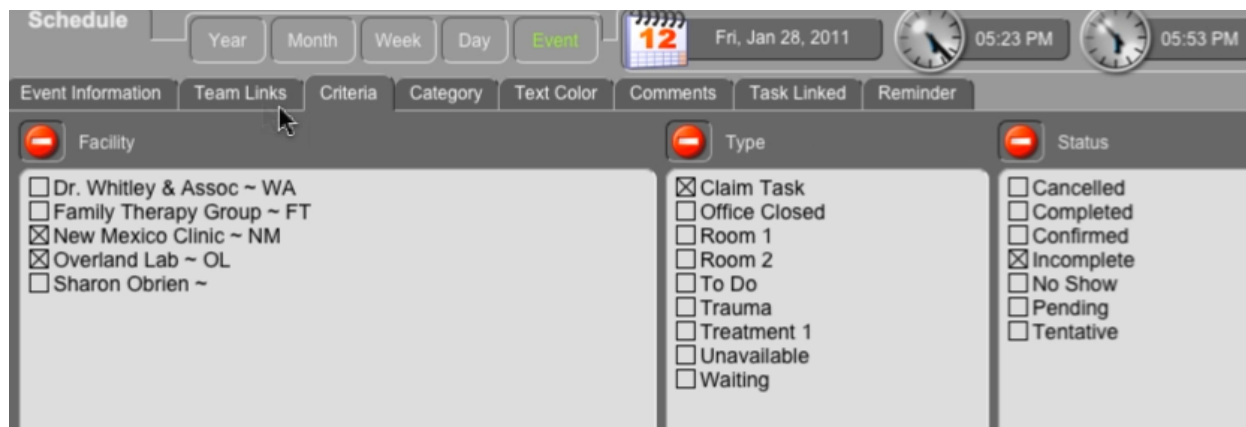


- Let's say we need a “Carrier Follow Up”.



- 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.

Claim Tasks



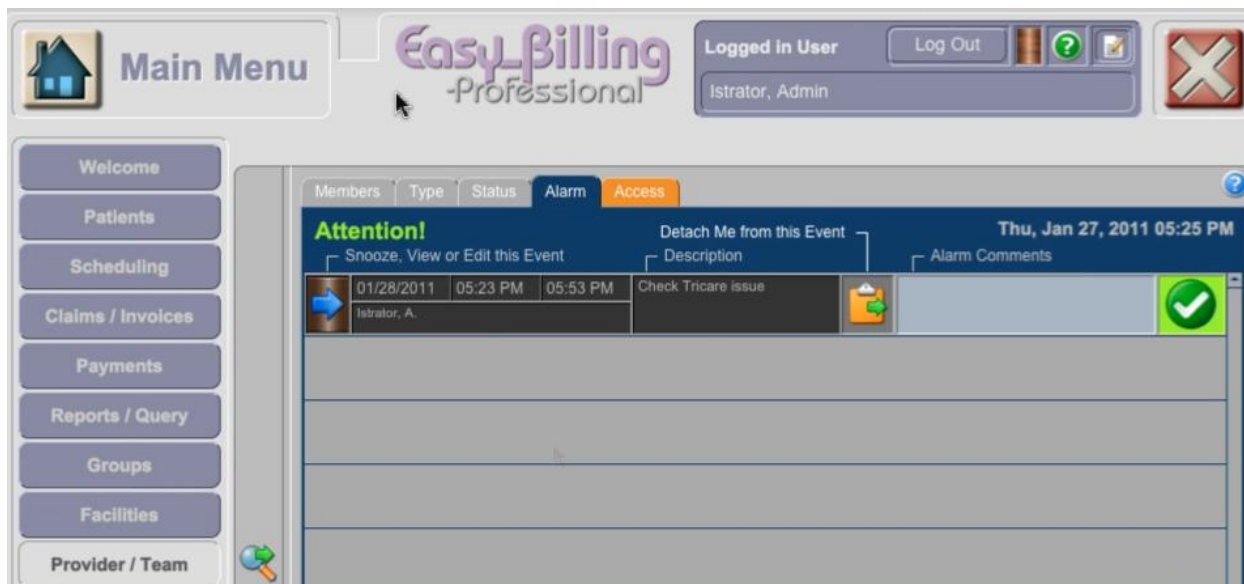
- We now see a list here of all or our claims which are attached to this task.

The screenshot shows the 'Schedule' interface with a table of claim tasks. The table has the following columns: Claim ID, Patient, Claim Status (Open | Verified | Processed), and Balance.

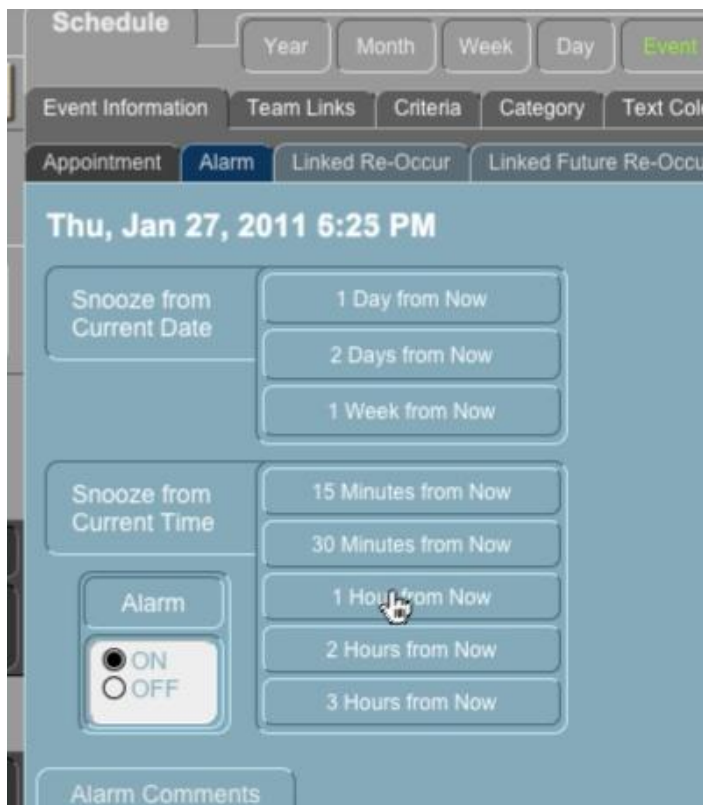
Claim ID	Patient	Claim Status (Open Verified Processed)	Balance
CLA25	Self Pay Jones, S. .	Open Un-processed Verified Ready Elec	170.00
CLA26	Self Pay Jones, S. .	Open Un-processed Verified Ready Elec	35.00
CLA34	Self Pay Colmax, B. .	Complete Open Verified Ready Elec	0.00
CLA49	Self Pay Colmax, B. .	Open Un-processed Verified	0.00
CLA50	Self Pay Colmax, B. .	Open Un-processed Verified	0.00
CLA48	Self Pay Jones, M. L.	Open Verified	45.00
CLA87	Self Pay Jones, J. .	Collection Sent Open Un-processed Incomplete Verified	0.00
CLA99	Self Pay Jones, J. .	Open Un-processed Incomplete Verified	95.00

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.

Claim Tasks

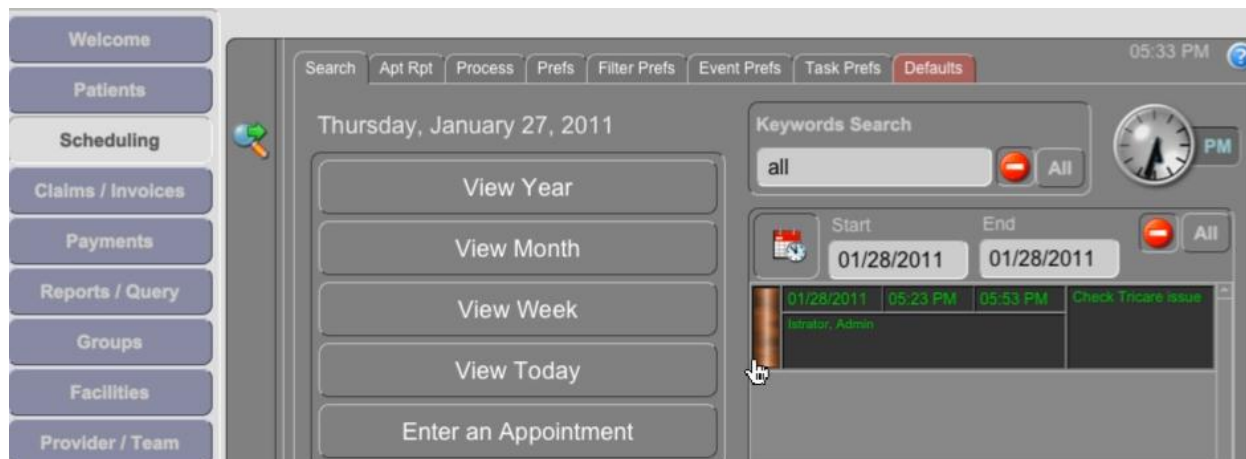


You can set the snooze for this alarm to an hour from now. Then when you return to the main menu, the warning will no longer be there.



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.

Claim Tasks



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.

