



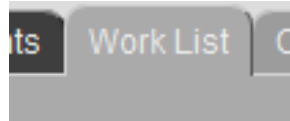
Worklists

- Claims go onto a Worklist when a claim is entered, or a claim is added to a User's Worklist.
- Once a claim is on a user's Worklist, it can be accessed most easily by clicking on the Worklist icon, either at the top of the screen, or on the side of the screen.



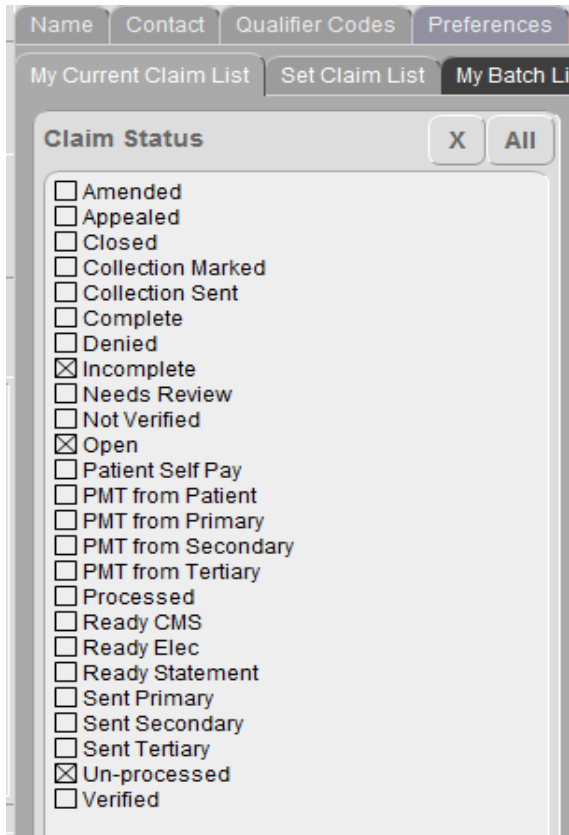
Setting Claim Status defaults for Worklists:

- Click the Provider/Team Menu > Click the blue arrow to enter the User Account and select the **Work List** tab

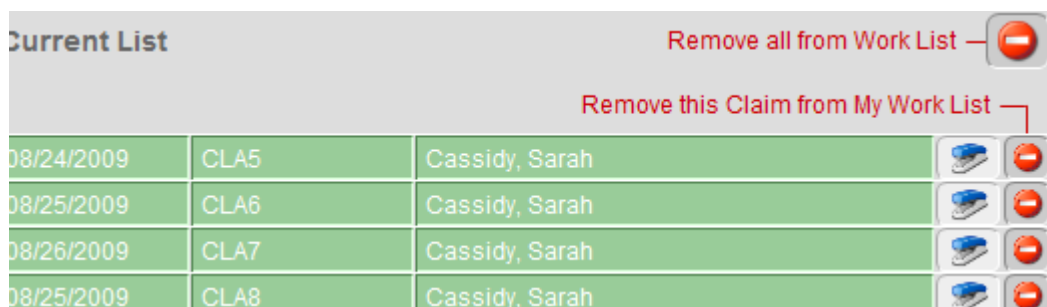


- On the **My Current Claim List** tab, choose from the Claim Status list the types of claims you would like to appear in your Worklist. For example, if you would like to work on all claims, click All. If you would like to work only on claims with "Ready Elec" selected, click the X to clear the status list and click "Ready Elec" to show those claims. You can return to change the claims appearing on your Worklist at any time.

EB Pro Worklists

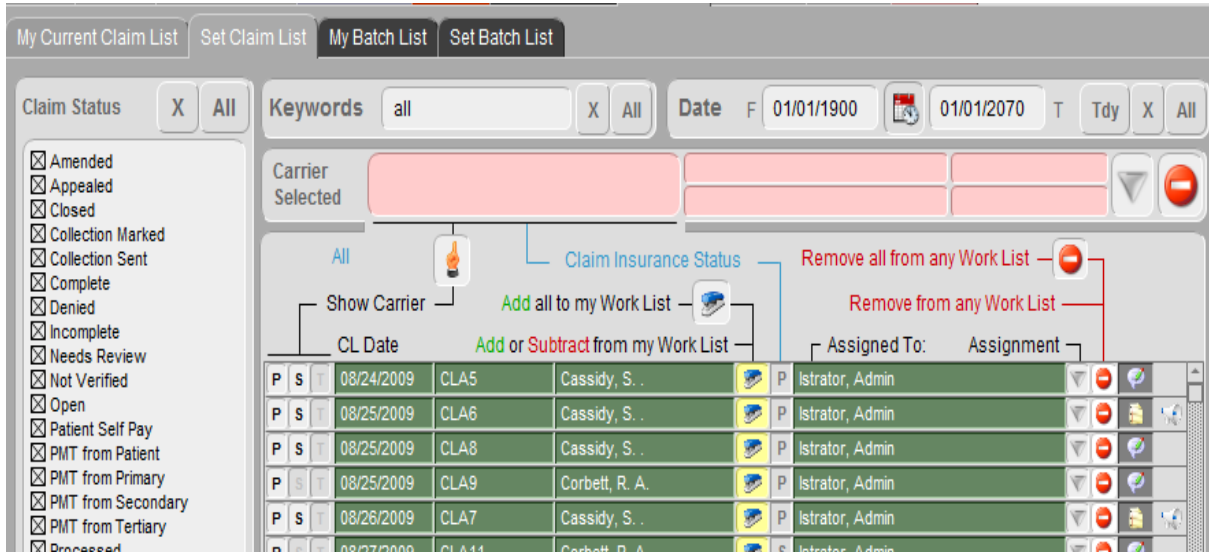


- Also on the **My Current Claim List** tab you can choose claims to remove All or individual claims from anyone's Worklist as in the case of Closed claims.



- On the **Set Claim List** tab, you can find claims by Keyword searches, Date Range, Carrier, or Claim Status and remove them from any Worklist, or add them individually or in batch to your worklist.

EB Pro Worklists

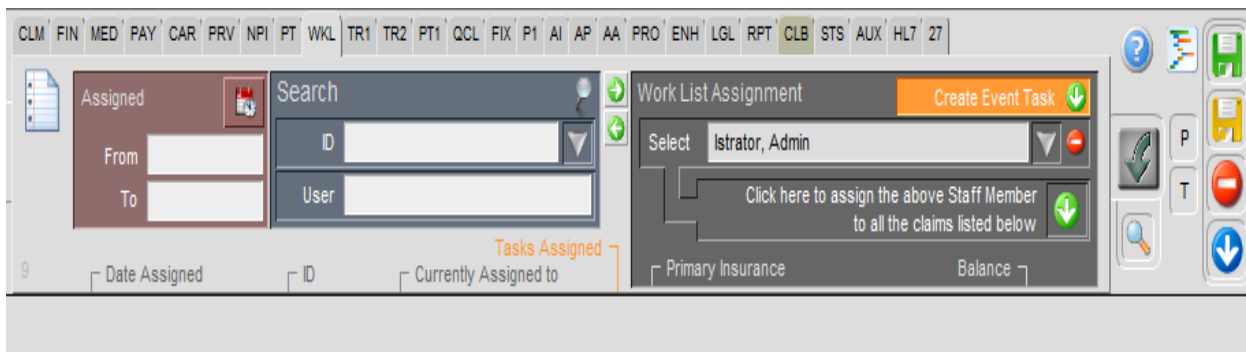


- Click the Worklist icon on the left to then go to your Worklist.



Reports Menu > Claim Query:

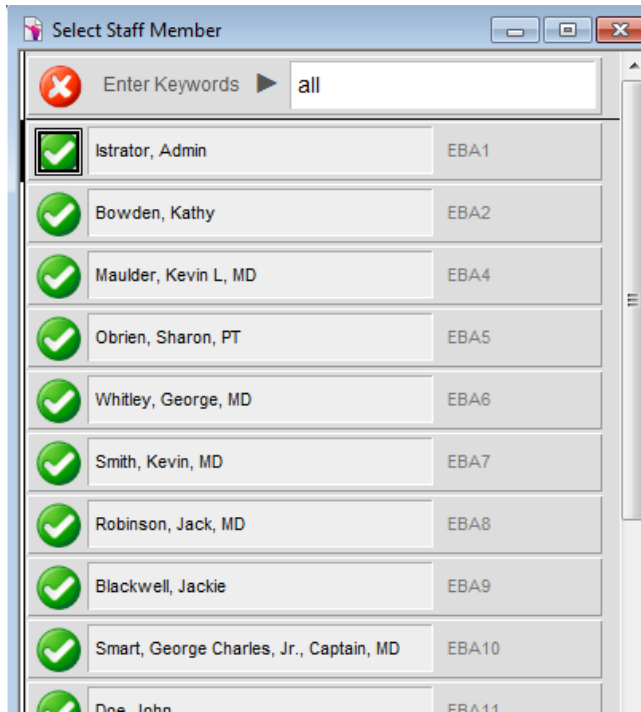
- On the Reports Menu > Claim Query, select the **WKL** tab to search for and assign the claims to different Team Members' Worklists.



- You can search by the Date Assigned, then click the Work List Assignment Select button to bring up a Team Member's name in the

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search dialogue box. Once the name is selected, click the green down arrow icon to assign the Staff Member to all the claims in the list.



- You can also search for claims by using any of the tabs across the top to find claims to move to another Team Members Worklist.

