

# TRACE Quick Start Guide

## For Facility Users

Easy to use quick guide provides a simple step by step guide for frequently used functions:

[TRACE Dashboard Navigation](#)

[Approval Process & Proxy Approvers](#)

[Processing Payments-Invoice Dashboard](#)

[Payment Status Dashboard](#)

[Reporting](#)

[Practice Manager Quick Guide](#)

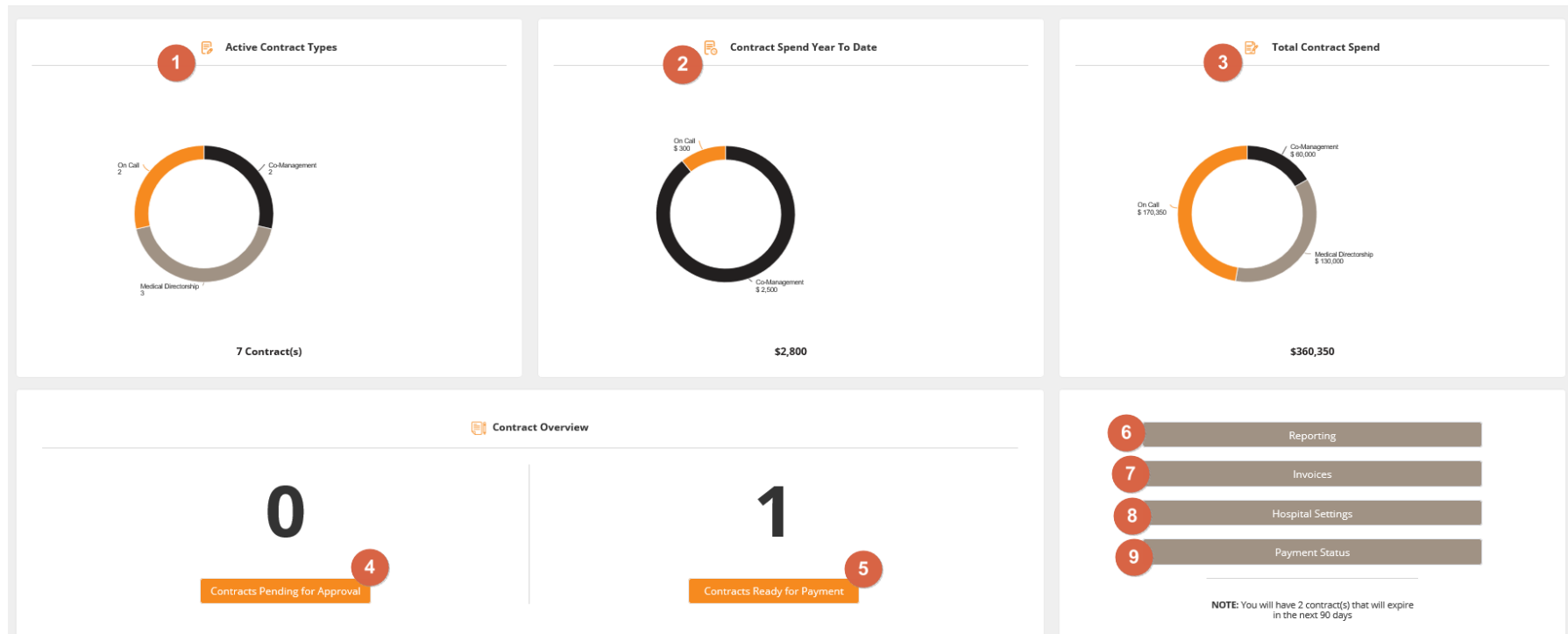
[Reminders & Notification Settings](#)

## TRACE HOME DASHBOARD

The TRACE User Dashboard provides all TRACE facility users the necessary tools to oversee facility contracts, manage approvals, payments & reporting.

1. **Active Contract Types:** A breakdown of active contracts by type. (Information is specific to each user type and visibility)
2. **Contract Spend YTD:** Indicates the \$ amount the Facility I has paid out for all active provider contracts by type.
3. **Total Contract Spend:** Indicates total potential spend by contract type over a 12-month period.

Welcome to Your TRACE Dashboard



4. **Contracts Pending for Approval:** Tap to access Approval Dashboard. The number updates to indicate # of contracts ready for user to approve. Once user approves all contracts in queue, the counter will go to 0 indicating no further action is needed.
5. **Contracts Ready for Payment:** Access for applicable users only; the number indicates how many contracts have been fully approved and are ready for payment. The button will direct the User to the "Invoice Dashboard" and they will submit payment for all approved & qualified physicians.
6. **Reporting:** The button takes the User to Report Generation: "Hospital Report, Payment Status Report, Invoices, Physician Logs, Active Contracts"
7. **Invoices:** This button takes the User to the "Invoice Dashboard" to view and/or generate physician invoices for payment.
8. **Facility Settings:** Navigation to Settings Dashboard for Facility Admin Users & User Profile information (See section for Facility Admin Users)
9. **Payment Status:** Navigation to Payment Status Dashboard available for ALL Facility Users to track contract approvals in real time.

**List of Contract Specifics:** Expand + sign to view relative contract details. Viewable information specific to each user.

1. **Contract Name**
2. **Practice Name**
3. **Provider Name**
4. **Contract Approvers**
5. **Contract Details** ⓘ
6. **Link to full contract/amendment(s)** 📄

List of Contract Specifics

⊖ Zion Park Medical Center

⊖ Call Coverage - Ortho... Total Physicians - 1 Paid to Date - \$58,600

⊖ Victory Orthopaedic Ass... 1 Physician(s) Paid to Date - \$58,600

Tanya Lockett FM: Judy Cameron EM: James T Zorn 📄 ⓘ

⊖ Call Coverage - OBGYN Total Physicians - 2 Paid to Date - \$101,054

⊖ Victory Orthopaedic Ass... 1 Physician(s) Paid to Date - \$85,850

Russell Williamson FM: Judy Cameron EM: James T Zorn 📄 ⓘ

⊕ Willowglen GYN PLLC 1 Physician(s) Paid to Date - \$15,204

⊖ Call Coverage - Ophth... Total Physicians - 1 Paid to Date - \$57,650

⊕ Victory Orthopaedic Ass... 1 Physician(s) Paid to Date - \$57,650

Med Dir - Population Health

Start Date: 08/01/2019

End Date: 07/31/2021

Final Submission Date: 08/30/2021

Min Hours: 0.00 / Month

Max Hours: 20.00 / Month

Rate: \$150.00 / Hour

⊕ Hospitalist Coverage Total Physicians - 2 Paid to Date - \$25,225

## APPROVAL PROCESS

The purpose of the Approval Dashboard is to provide a one stop shop for Approvers to Review, Approve or Reject Provider Contracts/Timesheets.

Default screen displays **CONTRACT TYPE SUMMARY** including # of Contracts, Periods & Calculated payments available to approve.

**Filters will default to all;** however, use the active filters up top to view specified *Facility, Practice, Payment Type, Agreement, Physician, Contract Type, or Period.*

Welcome to the Approval Dashboard

Home Reporting Invoices Payment Status

Facility: All Agreement: All

Practice: All Physician: All

Payment Type: All Contract Type: All

Time Period: Start Month End Month  
1: 03/01/2021 2: 04/30/2021

+	Medical Directorship	Total Contracts to Approve 3	Period(s) ( Mar 2021 - Apr 2021)	Calculated Payments: \$4,587.50	<input checked="" type="checkbox"/> <input type="checkbox"/>
+	On Call	Total Contracts to Approve 2	Period(s) ( Mar 2021 - Apr 2021)	Calculated Payments: \$10,804.00	<input checked="" type="checkbox"/> <input type="checkbox"/>
+	Co-Management	Total Contracts to Approve 1	Period(s) ( Mar 2021 - Apr 2021)	Calculated Payments: \$270.00	<input checked="" type="checkbox"/> <input type="checkbox"/>

Export To Excel Column Display Preferences Submit for Approval

**Approve/Reject check boxes:** At the contract summary level, the check boxes will default to approve; if user chooses NOT to expand and review the provider(s) contract details, they can tap "Submit For Approval". **DISCLAIMER:** You will be approving ALL contracts.

**PROVIDER SUMMARY:** Tap on the + sign to view the contract details by **provider**. Each provider contract will show *periods* available to approve, *summation of time submitted* vs. expected & *calculated payment* vs. expected & a link to full copy of provider contract.

On Call								✓	✕
Total Contracts to Approve 3		Period(s) ( Feb 2021 - May 2021)		Calculated Payments: \$15,800.00				✓	✕
+	Doug Baldwin	Mar 2021 - Mar 2021	Call Coverage - Ophthalmology	HRS Approving: NA	EXP HRS: NA	CALC PMT: \$600.00	EXP PMT: NA	✓	✕
+	Gino Castillo	Feb 2021 - Mar 2021	Call Coverage - OBGYN	HRS Approving: NA	EXP HRS: NA	CALC PMT: \$9,200.00	EXP PMT: NA	✓	✕
+	Russell Williamson	May 2021 - May 2021	Call Coverage - OBGYN	HRS Approving: NA	EXP HRS: NA	CALC PMT: \$6,000.00	EXP PMT: NA	✓	✕
Medical Directorship								✓	✕
Total Contracts to Approve 4		Period(s) ( Mar 2021 - May 2021)		Calculated Payments: \$7,212.50				✓	✕
+	Daniel Mariner	Mar 2021 - May 2021	Medical Dir - Palliative Care	HRS Approving: 2.25	EXP HRS: 30.00	CALC PMT: \$225.00	EXP PMT: \$3,000.00	✓	✕
+	Doug Baldwin	Mar 2021 - Mar 2021	Medical Staff - President	HRS Approving: 3.75	EXP HRS: 15.00	CALC PMT: \$750.00	EXP PMT: \$3,000.00	✓	✕
+	Lauren Brady	Mar 2021 - Apr 2021	Med Dir - Family Medicine	HRS Approving: 17.75	EXP HRS: 26.00	CALC PMT: \$3,550.00	EXP PMT: \$5,200.00	✓	✕
+	Russell Williamson	Apr 2021 - May 2021	Med Dir - Total Joints	HRS Approving: 10.75	EXP HRS: 40.00	CALC PMT: \$2,687.50	EXP PMT: \$10,000.00	✓	✕

Export To Excel
Column Display Preferences
Submit for Approval

User can choose to Approve at Provider Level or **Reject & Unapprove** timesheet back to the Provider (This will unlock all provider logs on timesheet and allow them to add/edit/delete. They will then be required to REAPPROVE once submissions are accurate.

Medical Directorship								✓	✕
Total Contracts to Approve 1		Period(s) ( Mar 2021 - Apr 2021)		Calculated Payments: \$3,550.00				✓	✕
+	Lauren Brady	Mar 2021 - Apr 2021	Med Dir - Family Medicine	HRS Approving: 17.75	EXP HRS: 26.00	CALC PMT: \$3,550.00	EXP PMT: \$5,200.00	✓	✓

Date
Agreement

03/02/2021
Directorship Agreements-

03/05/2021
Directorship Agreements-

Are you sure you want to Reject & Unapprove all logs back to provider ?

Cancel
Ok

Approve
Reject
Approval Level 1

Judy Came Pending
Judy Came Pending

Tap + Sign to Expand Provider to view **log details**. Hover over details to see "Full details". User can Approve, Reject or Uncheck individual logs.

Medical Directorship										✓	✗
Total Contracts to Approve 1		Period(s) ( Apr 2021 - May 2021)		Calculated Payments: \$2,687.50						✓	✗
Russell Williamson		Apr 2021 - May 2021	Med Dir - Total Joints	HRS Approving: 10.75	EXP HRS: 40.00	CALC PMT: \$2,687.50	EXP PMT: \$10,000.00			✓	✗
Date	Agreement	Contract Name	Physician	Log	Details	Hours Worked	Physician Approval	Approve	Reject	Approval Level 1	Approval Level 2
04/28/2021	Directorship Agreements-	Med Dir - Total Joints	Russell Williamson	Clinical Operations	Chart review a...	2	Approved	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Judy Cameron Pending	N/A
04/30/2021	Directorship Agreements-	Med Dir - Total Joints	Russell Williamson	Medical Staff Meeting	TRACE	1.75	Approved	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Judy Cameron Pending	N/A
04/30/2021	Directorship Agreements-	Med Dir - Total Joints	Russell Williamson	Medical Staff Meeting	TRACE	3	Approved	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Judy Cameron Pending	N/A
05/28/2021	Directorship Agreements-	Med Dir - Total Joints	Russell Williamson	Medical Staff Meeting	trace training	2	Approved	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Judy Cameron Pending	N/A
05/31/2021	Directorship Agreements-	Med Dir - Total Joints	Russell Williamson	Medical Staff Meeting	MEC committe...	2	Approved	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Judy Cameron Pending	N/A

Export To Excel
Column Display Preferences
Submit for Approval

## Rejecting individual Logs:

1. Tap the check box for reject next to the log.
2. Select a Reason for Rejection or Custom. Repeat steps as needed.
3. Once all appropriate logs are checked to reject; tap "Submit For approval " and ALL logs checked to Approve will move forward, and any logs checked to reject will be sent back to the provider for further review.
4. Provider will receive an email and notification with rejection reason for review.

**Export to Excel:** Tap the Export to Excel button to export all available contracts and details for approval. Utilize filters as needed for export preferences.

**Column Display Preferences:** View or Hide column data at contract details level ( This is the after expanding the + Sign next to each Contract Type & Physician).

**Proxy Approver:** Assign another user to approve on your behalf during absence

- **Tap Profile** from main TRACE dashboard. (Top Right next to Help Center)
- **Tap Proxy Approver:** Complete *Approver, Start Date, End Date* & click *Submit*.

**NOTE:** Assigned proxy must be a user in TRACE. To add a user contact [TRACE@dynafios.com](mailto:TRACE@dynafios.com) or internal TRACE Admin.

Help Center
JC
My Profile
Submit Signature
Sign Out

Proxy Approver
Settings

Assign Proxy Approver

Proxy Approver: Stella Martin
Start Date: 06/11/2020
End Date: 06/18/2020

Delete Proxy
Submit

## Invoice Generation- Contracts Ready for Payment

1. Provider Contracts available for payment will display under **"Pending Payments."**
2. User selects a period under contract *i.e. January 2021*, and payment amount(s) for qualifying providers will auto-calculate in **Orange**.
3. The Digit(s) next to Provider's name indicate total units of activity approved based upon contract type ( *i.e* Hours or Periods/Shifts).
4. The check box next to the payment amount indicates the providers that will appear on the output invoice.

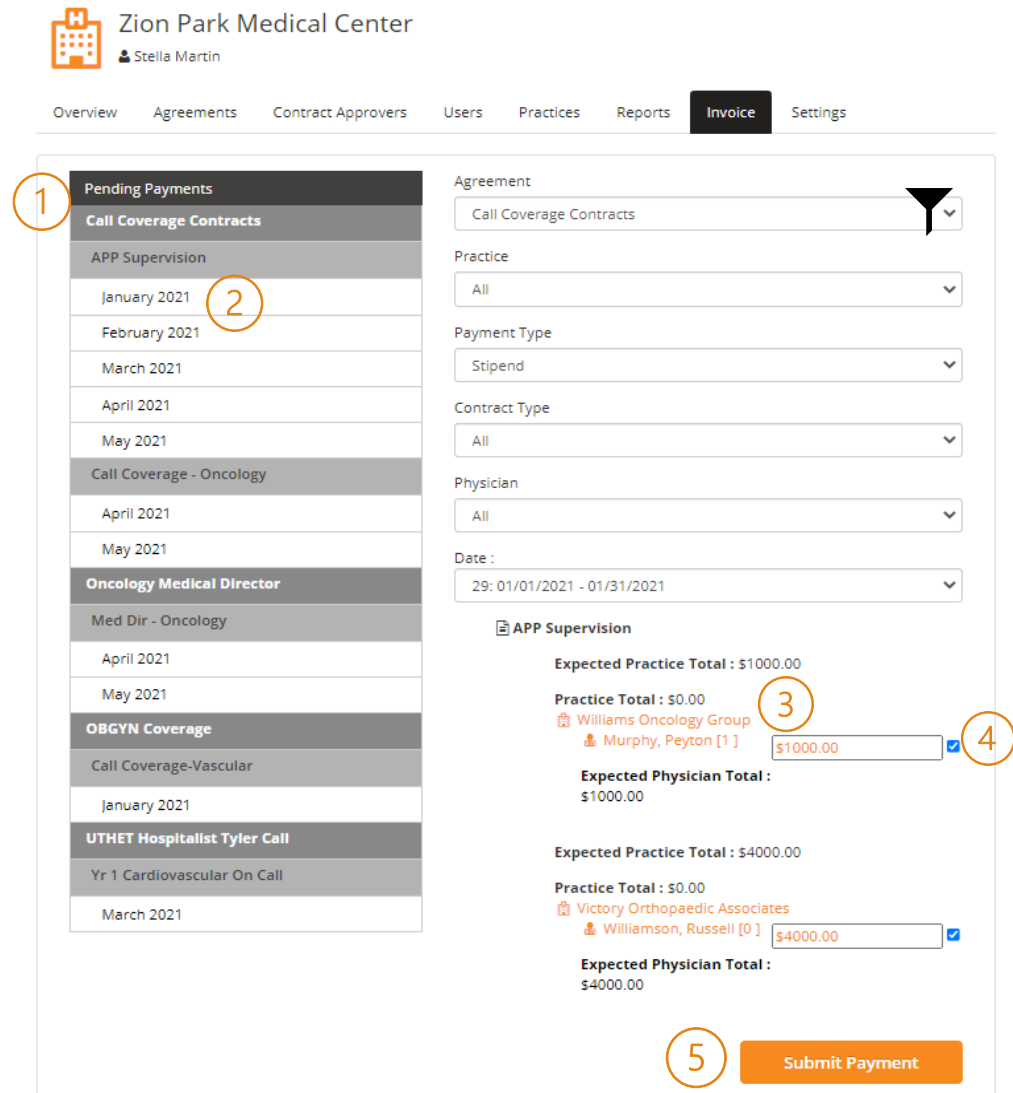
**NOTE: If only a single provider, practice, or contract is preferred per invoice, utilize the filters prior to processing.**

5. Once payment amount is confirmed, Tap "Submit Payment" & any calculated payments in ORANGE with Box checked will process on invoice.

A PDF of the generated invoice is sent to indicated e-mail recipients per contract set-up. To view automatically generated invoices

- Select **Reports** Tab & then select **Invoices**.
- All automatically generated invoices will be saved under Invoices as a PDF.

Specified Users will access the Invoice Dashboard to provide final review of calculated contract payments and generate invoice for processing.



**Zion Park Medical Center**  
Stella Martin

Overview Agreements Contract Approvers Users Practices Reports **Invoice** Settings

**1** Pending Payments

**2** Call Coverage Contracts

APP Supervision

January 2021

February 2021

March 2021

April 2021

May 2021

Call Coverage - Oncology

April 2021

May 2021

**Oncology Medical Director**

Med Dir - Oncology

April 2021

May 2021

**OBGYN Coverage**

Call Coverage-Vascular

January 2021

**UTHET Hospitalist Tyler Call**

Yr 1 Cardiovascular On Call

March 2021

Agreement  
Call Coverage Contracts

Practice  
All

Payment Type  
Stipend

Contract Type  
All

Physician  
All

Date :  
29: 01/01/2021 - 01/31/2021

**APP Supervision**

Expected Practice Total : \$1000.00

Practice Total : \$0.00

Williams Oncology Group

Murphy, Peyton [ 1 ] \$1000.00

Expected Physician Total : \$1000.00

Expected Practice Total : \$4000.00

Practice Total : \$0.00

Victory Orthopaedic Associates

Williamson, Russell [ 0 ] \$4000.00

Expected Physician Total : \$4000.00

**5** Submit Payment

## Additional Tips About Payment Processing

1. Once a payment is generated and invoice created, the contract & period will drop off "Pending payments" and the payment amount will show in **Black**

If an invoice needs to be regenerated, **Check the box** next to **Black** payment amount. Once an invoice has been generated, the check box will default to unchecked to avoid duplicate payments.

2. The calculated amount Can be overridden, and manual amount owed to provider can be input.
  - a) If the amount exceeds the calculated payment, the excess amount will display in RED but allow for processing.
  - b) If manual payment amount is less than calculated payment, system will indicate an additional payment owed.
3. If the user would like to generate an invoice for a specific physician, practice, or contract, they can also create under Reports Tab (Please see Reporting section for detailed instructions)

**QUICK TIP:** User shall utilize filters to view information to rerun invoices, confirm payments or update payments.



**Med Dir - Family Medicine**

Expected Practice Total : \$0.00

Practice Total : \$1000.00 ☒

Victory Orthopaedic Associates

Brady, Lauren [ 5 ] \$1000.00 ☐

Expected Physician Total : \$0.00

**Call Coverage-Vascular**

Expected Practice Total : \$-1000.00

Practice Total : \$6000.00

Willowglen GYN PLLC

Donaldson, Joy [ 5 ] 6000.00 ☐

Expected Physician Total : \$-1000.00

**APP Supervision**

Expected Practice Total : \$200.00

Practice Total : \$800.00

Williams Oncology Group

Murphy, Peyton [ 1 ] \$800.00 ☐

\$200.00 ☒

Expected Physician Total : \$200.00

Overview Agreements Users Practices **Reports** Invoice Settings

Hospital Report Payment Status Report **Invoices** Physician Logs Lawson Interface Report




Active Contract Reports

Filename	Created
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## SAMPLE INVOICE

1. The auto-generated invoice includes all necessary information for A/P Payment processing.
2. The invoice can be customized with information such as "Vendor ID", Contract #, Cost Ctr, etc.
3. All log details including summary of time worked, payment amount and approval signatures are included on the invoice.

Invoice #	Invoice Run Date	TRACE Invoice / Check Request				
April 006	04/10/2020 at 10:52:18 AM	Date Range:12/01/2019-12/31/2019				
						
Facility:	Zion Park Medical Center					
	1456 Jimmy Johns Rd					
	Webster Washington					
Liberty Anesthesia LLC						
Contract	Physician	Actions	Hours/ Days	Rate	Calculated Payments	Actual Payments
Medical Director- Pain Management	Moore MD, Patrick	Academics/Education	3.00	\$150.00	\$450.00	
		Administration	1.00	\$150.00	\$150.00	
		Provider 1 on 1 Meetings	1.75	\$150.00	\$262.50	
		Leadership Meetings	2.00	\$150.00	\$300.00	
1215-0222-12385- 006	Vendor ID 112548	TOTAL	7.75	-	\$1162.50	\$1162.50
Physician	Approval Level 1	Approval Level 2	Approval Level 3	Approval Level 4	Approval Level 5	Approval Level 6
		NA	NA	NA	NA	NA
	Contract Manager	NA	NA	NA	NA	NA
	James T Zorn	NA	NA	NA	NA	NA
02/13/2020 10:48 AM MST	03/18/2020 09:25 AM PDT	NA	NA	NA	NA	NA

## PAYMENT STATUS DASHBOARD

The purpose of the Payment Status Dashboard is to provide facilities a central location to view all Providers contracts & timesheet logs that are in "pending status" and identify where in the approval process the logs are being held-up.

1. **Active Filters:** Use the active filters to view preferred information (Provider, Agreement, Practice, Contract Type, Date Range)
2. **Column Display Preferences:** Tap Column Display preferences to edit viewable information by column.
3. **Export to Excel** – Tap the Export to Excel button to export the logs in the details section to an Excel spreadsheet.
4. **Navigation Buttons:** Use the navigation buttons at the top right of the screen to navigate to the home/landing page, the invoice dashboard, or the reports tab of the TRACE application.

Welcome to the Payment Status Dashboard

4

Home

Reporting

Invoices

Approval Dashboard

Facility: All

Practice: All

Payment Type: All

Status: All

1

Agreement: All

Physician: Lockett, Tanya

Contract Type: All

Time Period: Start Month End Month

1: 02/01/2021 1: 02/28/2021

Date	Agreement	Contract Name	Practice	Physician	Log	Details	Hours Worked	Physician Approval	Approval Level 1	Approval Level 2
02/20/2021	Call Coverage Contracts	Call Coverage - Orthopedic	Victory Orthopa...	Tanya Lockett	On-Call		1	Approved	Judy Cameron Pending	James T Zorn Pending
02/22/2021	Call Coverage Contracts	Call Coverage - Orthopedic	Victory Orthopa...	Tanya Lockett	On-Call		1	Approved	Judy Cameron Pending	James T Zorn Pending
02/23/2021	Call Coverage Contracts	Call Coverage - Orthopedic	Victory Orthopa...	Tanya Lockett	On-Call		1	Approved	Judy Cameron Pending	James T Zorn Pending
02/25/2021	Call Coverage Contracts	Call Coverage - Orthopedic	Victory Orthopa...	Tanya Lockett	On-Call		1	Approved	Judy Cameron Pending	James T Zorn Pending

Column Display Preferences

2

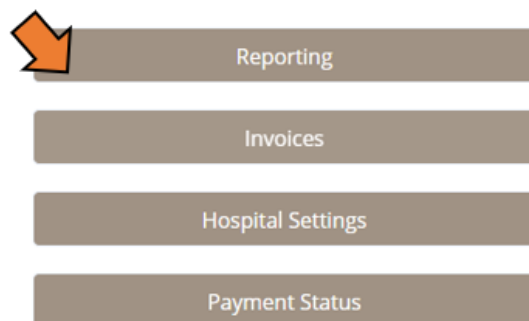
3

Export To Excel

## REPORTING

A variety of Reports can be generated, By contract type, agreement, period, practice, or provider. See below how to generate a report and identify which report provides the appropriate information

From the main Dashboard select the **Reports Tab** & then select the Tab with the preferred report.

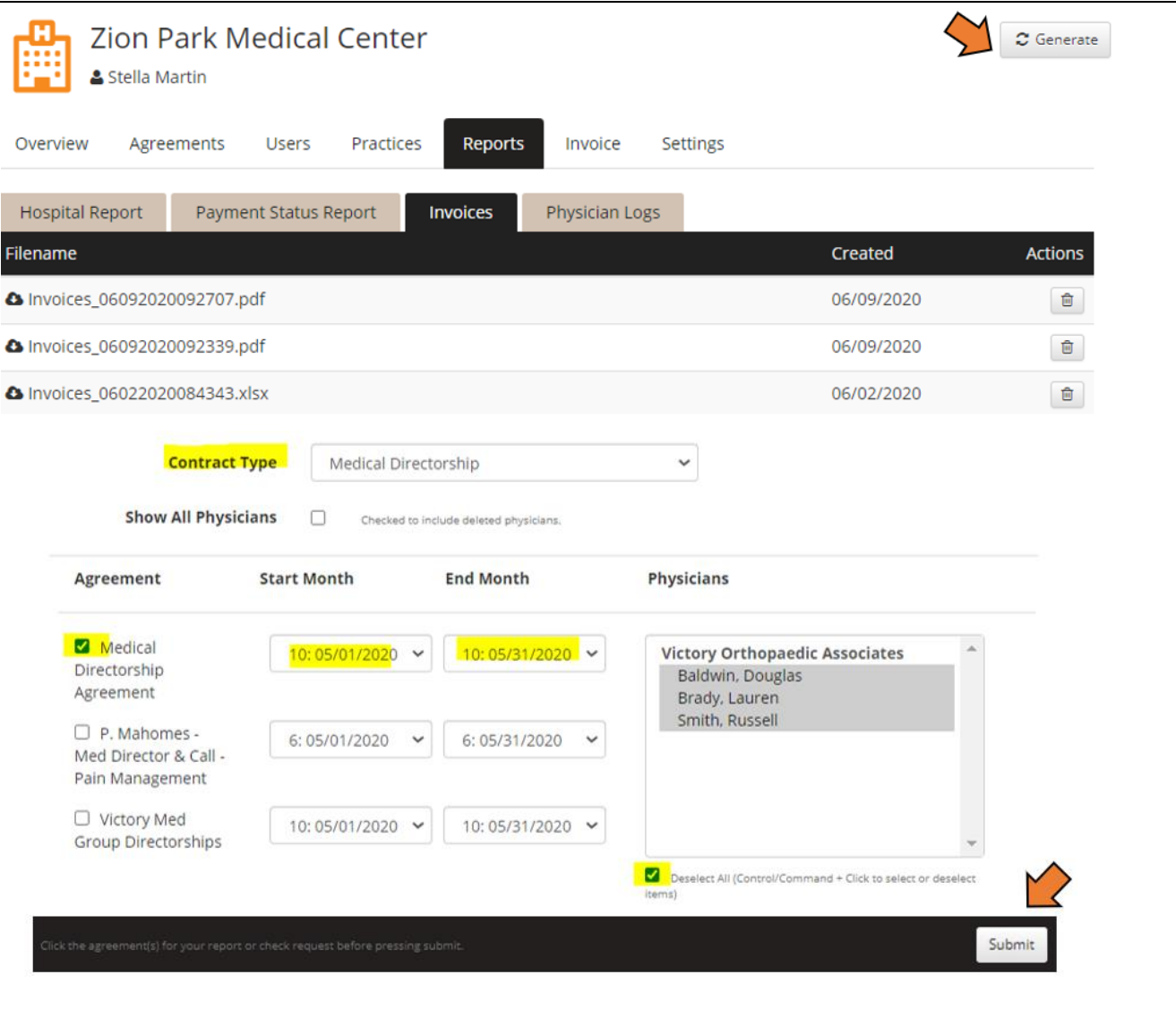


Tap **Generate**

Select Report Criteria:

- Contract Type
- Agreement
- Time Period
- Physicians

Tap **Submit** & Report will generate in XLS format.



The screenshot shows the 'Zion Park Medical Center' reporting interface. At the top, there's a header with the center name and a user profile for 'Stella Martin'. A 'Generate' button is in the top right. Below the header is a navigation bar with tabs: 'Overview', 'Agreements', 'Users', 'Practices', 'Reports' (selected), 'Invoice', and 'Settings'. Under the 'Reports' tab, there are sub-tabs: 'Hospital Report', 'Payment Status Report', 'Invoices' (selected), and 'Physician Logs'. A table lists generated reports with columns 'Filename', 'Created', and 'Actions'. Below the table, there's a 'Contract Type' dropdown set to 'Medical Directorship'. A checkbox for 'Show All Physicians' is present. The main section is a table with columns 'Agreement', 'Start Month', 'End Month', and 'Physicians'. It lists three agreements: 'Medical Directorship Agreement' (selected), 'P. Mahomes - Med Director & Call - Pain Management', and 'Victory Med Group Directorships'. Each agreement has date pickers for 'Start Month' and 'End Month'. To the right, a list of physicians is shown under 'Victory Orthopaedic Associates'. At the bottom, there's a 'Submit' button and a note: 'Click the agreement(s) for your report or check request before pressing submit.'

## Physician Logs Report:



- Detailed logs for specified contract, period, and physician.
- Includes Hours/Days worked summary
- Approver Dates & Signatures

**NOTE:** This report cannot be generated until all approvals and payments have been completed for the month.



## Physician Logs Report

ZION PARK MEDICAL CENTER  
Cumulative Physician Log Report  
Period: 12/01/2019 - 03/31/2020  
Run Date: 04/10/2020

Physician Contract Details		Breakdown						
Practice	Physician	Action	Log Details	Period / Date	Max Hours Possible	Hours Worked	Physician Approved Date	Level 1 Manager Approved Date
<b>P. Mahomes -Med Director &amp; Call - Pain Management</b> Contract Period: 12/01/2019 - 12/31/2020 Report Period: 12/01/2019 - 12/31/2019								
Liberty Anesthesia LLC	Moore MD, Patrick			12/01/2019 - 12/31/2019	20	7.75		
		Academics/Education	3 hours daily schedule clinical teaching	12/09/2019	-	3	02/13/2020	03/18/2020
		Administration	1 hour pretext administration and phone recording	12/13/2019	-	1	02/13/2020	03/18/2020
		Leadership Meetings	Provider Recruitment discussion to Pain mgmt group with John, Rick, Shirley and Teresa.	12/20/2019	-	2	02/13/2020	03/18/2020
		Provider 1 on 1 Meetings	1 on 1 training with new NP on 3M for review of pre-op protocols.	12/30/2019	-	1.75	02/13/2020	03/18/2020
Signature(s)								



## Payment Status Report

ZION PARK MEDICAL CENTER  
Payment Status Report  
Period: 02/01/2020 - 05/31/2020  
Run Date: 06/09/2020

Medical Directorship Agreement								
Contract Period: 08/01/2019 - 08/30/2020								
Practice	Physician	Action	Log Details	Period / Date	Hours Worked	Physician Approval Date	Approval Level 1 Financial Manager Approval Date	Approval Status
Report Period: 02/01/2020 - 02/29/2020								
Victory Orthopaedic	Baldwin, Douglas	Medical Staff Meeting	TRACE training meeting	02/13/2020	1.75	04/23/2020	04/24/2020 Cameron, Judy	Approved
Victory Orthopaedic	Baldwin, Douglas	Clinical Supervision of Residents & Fellows	Worked with nursing team on rounds	02/21/2020	2	04/23/2020	04/24/2020 Cameron, Judy	Approved
Victory Orthopaedic	Baldwin, Douglas	Colleague Conversations	discussion around TRACE process for time submission	02/24/2020	1	04/23/2020	04/24/2020 Cameron, Judy	Approved
Total					4.75			
Report Period: 03/01/2020 - 03/31/2020								
Victory Orthopaedic	Baldwin, Douglas	Colleague Conversations	trace discussion	03/12/2020	1.5	04/23/2020	04/24/2020 Cameron, Judy	Approved
Victory Orthopaedic	Baldwin, Douglas	Quality Improvement	chart audits for hip fx	03/12/2020	2.25	04/23/2020	04/24/2020 Cameron, Judy	Approved
Total					3.75			

## Payment Status Report:

- Separate tab for each provider with available logs
- Hours/Days worked summary
- Approval Status of logs including approval dates

**NOTE:** The Payment Status Dashboard is also useful to identify payment status and locate logs in the approval flow.

## Hospital Report:

Provides a productivity summary including Hours worked, Payments, & Contract Terms.

**Period:** Displays metrics for most recent period of Contract.

**CYPTM:** Includes monthly breakdown by contract of productivity metrics (hours worked, payments FMV Rate).

**CYTD:** A roll-up summary of the monthly productivity metrics CYTD

For Co-Management If a physician has logged hours and does not qualify for payment, this report will show that the physician may be over the FMV rate and not qualify based upon the contract requirements.




ZION PARK MEDICAL CENTER  
Contract Year To Prior Month Report  
Period: 05/01/2020 - 05/31/2020  
Run Date: 06/09/2020

## Hospital Report

	Hourly								Month of Contract
	Monthly Min Hours	Monthly Max Hours	Annual Max Hours	Potential Monthly Payment	Min Hours CYTPM	Worked Hours CYTPM	Amount Paid CYTPM	Amount To Be Paid CYTPM	
Med Director-Total Joints total	20	20	240	\$50,000.00	200	52	\$10,800.00	\$2,200.00	
<b>Victory Orthopaedic Associates Totals</b>	<b>20</b>	<b>20</b>	<b>240</b>	<b>\$0,000.00</b>	<b>200</b>	<b>52</b>	<b>\$10,800.00</b>	<b>\$2,200.00</b>	
Smith, Russell	20	20	240	\$5,000.00	200	52	\$10,800.00	\$2,200.00	
Smith, Russell	20	20	240	\$5,000.00	20	7.75	\$0.00	\$1,937.50	May
				\$5,000.00	20	6.75	\$1,687.50	\$0.00	Apr
				\$5,000.00	20	5.75	\$1,437.50	\$0.00	Mar
				\$5,000.00	20	4.75	\$1,187.50	\$0.00	Feb
				\$5,000.00	20	5.25	\$1,312.50	\$0.00	Jan
				\$5,000.00	20	3.75	\$937.50	\$0.00	Dec
				\$5,000.00	20	6.25	\$1,562.50	\$0.00	Nov
				\$5,000.00	20	1	\$250.00	\$0.00	Oct
				\$5,000.00	20	2.5	\$625.00	\$0.00	Sep
				\$5,000.00	20	8.25	\$1,800.00	\$262.50	Aug

Invoice #	Invoice Run Date	TRACE Invoice / Check Request
June 012	06/24/2020 at 03:38:46 PM	Date Range:02/01/2020-02/29/2020
Facility:	Zion Park Medical Center	
	1456 Jimmy Johns Rd Webster, Washington	

Victory Orthopaedic Associates									
Contract	Physician	Actions	Hours/Days	Rate	Calculated Payments	Actual Payments	Physician	Level 1	Level 2
Call Coverage Contract-Orthopedics	Lockett, Tanya	On-Call	4.00	\$500.00	\$2,000.00				
222365.3256	655234	<b>TOTAL</b>	4.00	-	\$2,000.00	\$2,000.00	05/19/2020 09:05 AM PDT	05/19/2020 09:06 AM PDT	06/09/2020 08:54 AM PDT
		<b>Practice TOTAL</b>				\$2,000.00			



**Invoices:** All PDF invoices automatically generated on the Invoice Dashboard will be filed under the Invoice Tab.

Additionally, an invoice can be generated in XLS format (by Agreement, Practice, Physician & Month) and saved for records or used to submit to Finance for payment.

*Invoices can be customized to include the appropriate information for payment processing (Such as Vendor ID, Cost Ctr, Contract ID, Remit to Address, Account# etc.)*

# TRACE QUICK GUIDE

## PRACTICE MANAGERS

User guideline for log submission functions and reports, available for Practice Managers (PM's) overseeing/managing Physician contracts within TRACE.

## TRACE Login

<http://tracedashboard.dynafios.com/login>

**Note:** User Credentials provided in Welcome Email  
From **TRACE Dashboard** select **Overview**

Welcome to TRACE Dashboard

## View Contract & Physician details

Select **Physicians Tab**

All active providers will be listed.

Select a **Provider** to view active contracts.

**Note:** Physician information and contract details will be listed in boxes on the right.

Select **Logs Tab** to view the recent logs submitted. Also available is to view if provider has approved logs Y/N

## Log Entry on behalf of Provider(s)

From Trace Dashboard select **Log Entry**

A list of the active Physician contracts will be listed for an associated Practice Manager.

Select a **Contract**

The physicians associated with the contract will be listed on the left.



Select **“Log Entry”** and user will be directed to a screen for Log Entry.

**NOTE:** Practice Manager can submit logs for ALL contract types on behalf of provider(s). They do NOT have approval authority for any contracts EXCEPT Call Coverage.

Jameson Up Beat Cardiologists  
Zebra Medical Center No Primary Manager

Overview Contracts Managers Physicians Reports

Physician(s): Test Medical Directorship Log Entry

Marie, Stella  
Below, Brandi

## Submitting a Log

**1. Select Physician** from drop down.

**Note:** The current month and all Recent logs will load

**2. Select Activity/Duty.**

**Note:** Burden of Call contracts “On-Call must be logged before “Called-in” or Called-Back”

**3. Select Date(s).** Selected date(s) will show in **Orange**. (Multi date selection only available for On-Call type contracts)

**4. Select Duration** for activity.

**5. Add Log details** if required per contract.

**6. Select Submit** to save Log(s).

**7. Select “Send to physician for approval”** to email the physician a reminder to login and Approve with an Electronic Signature for each associated contract.

Seahawks Surgeons Inc.  
Dynafios Demo Hospital No Primary Manager

Overview Contracts Managers Physicians

Contract	Start Date	End Date
Issaquah Surgical Directorship	09/01/2018	08/30/2020
Orthopedic Directorship	09/01/2018	08/30/2020

Physician Name : Marie, Stella

**Log Entry**

Action/Duty: Administration

Select Date: March 2019

Duration: 0.25

Log details:

**Contract Hours**

Monthly Min: 1.00 Monthly Max: 20.00  
Annual Max: 200.00

**Summary Of Hours Logged**

**CURRENT PERIOD**  
Worked: 0.00 Potential Remaining: 20.00

**PRIOR PERIODS**  
Worked: 21.50

**Recent Logs**

Log Date: 03/08/2019  
Action Name: Colleague Conversations  
Duration: 2.50  
Entered By: Delight, Donald  
Date Entered: 04/01/2019 9:08 AM PDT  
Log Details: test 4/1/19  
Approved By: -

Submit

## Approve Logs (PHYSICIAN)

**NOTE:** Physicians must Approve & provide Electronic Signature for all Contract logs monthly by logging into the TRACE app or TRACE desktop.

**TRACE App:** A flashing “Approve Logs” button → will show under each eligible contract when the physician logs into the App. They must Approve and submit a signature. An e-mail summary of logs approved will be sent to physician’s email address.

**Trace Desktop:** Physician Approval button is at the bottom of screen when logging in via URL  
<http://tracedashboard.dynafios.com/login>

Orthopedic Directorship

**CONTRACT HOURS**

Monthly Min: 1.00 Monthly Max: 20.00  
Annual Max: 240.00

**Summary of Hours Logged**

**Approve Logs**

Please approve logs for previous month.

Approve Logs Now

Not Now

**Log Approval**

Log Date: 03/07/2019  
Action Name: Performance Meeting  
Duration: 2.00  
Entered By: Delight, Donald  
Date Entered: 04/01/2019 10:04 AM PDT  
Log Details: test 4/1/19

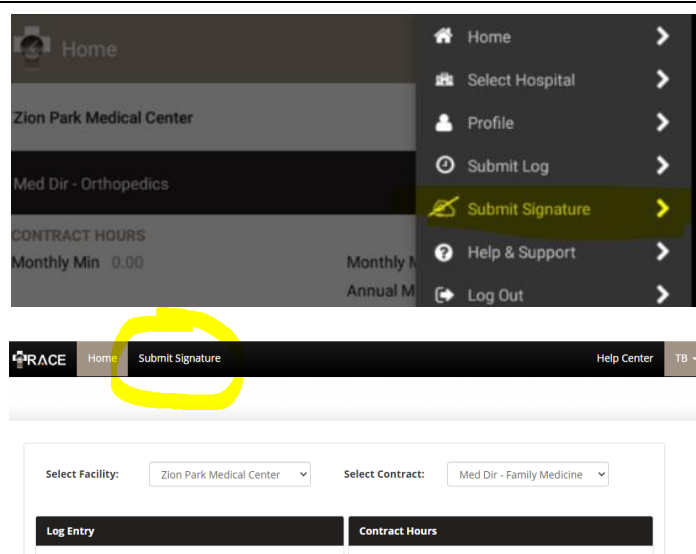
Approve Logs

## Practice Manager Approval: (Call Only)

Practice Manager can submit & **APPROVE** physicians monthly timesheet for Call Coverage contracts ONLY.

This can only be completed on behalf of the physicians, once the physician has set-up signature under their own Login.

**Submit Signature** Can be found at top of application on Web Interface, and under the Menu (top right) in the TRACE App.



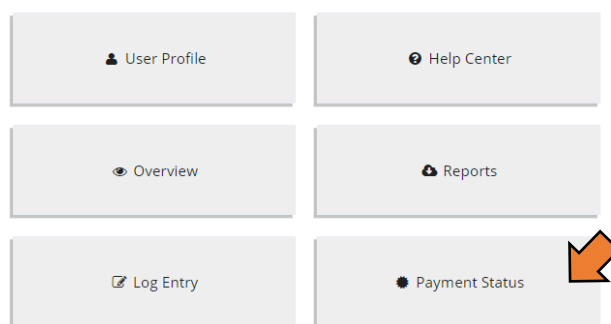
## View Physician Log Approval/Payment Status

From TRACE Dashboard select **Payment Status**

- Logs **Pending** Physician Approval
- Logs **Pending** Hospital Approval
- Logs **Approved** but have NOT been submitted for payment.

**Note:** If No logs appear on the Payment Status Dashboard, payments are being processed.

## Welcome to TRACE Dashboard



## Payment Status Dashboard

- Utilize **filters** to view specific contracts, physicians, or a date range.
- Each Level of approval will be noted in **Orange**, once logs have been approved.
- Column Display Preferences** (bottom left) will allow user to edit viewable & relevant data
- Export to Excel** will generate XLS file of all logs based upon filtered information.

Facility:	All	Agreement:	All
Practice:	All	Physician:	Baldwin, Doug
Payment Type:	All	Contract Type:	All
Status:	All		
Time Period:		Start Month	End Month
		1: 03/01/2021	1: 03/31/2021

Date	Contract Name	Practice	Physician	Log	Details	Hours Worked	Physician Approval	Approval Level 1	Approval Level 2
03/04/2021	Medical Staff - President	Victory Ortho...	Doug Baldwin	Medical Staff ...	test	1.5	Approved	Judy Cameron Pending	N/A
03/04/2021	Medical Staff - President	Victory Ortho...	Doug Baldwin	Quality Improv...	Details an...	2.25	Approved	Judy Cameron Pending	N/A
03/12/2021	Medical Staff - President	Victory Ortho...	Doug Baldwin	Quality Improv...	Add detail...	1.75	Pending	Judy Cameron Rejected	N/A
03/28/2021	Call Coverage - Ophthalmo...	Victory Ortho...	Doug Baldwin	24 Hour Week...		1	Approved	Judy Cameron Pending	James T Zorn Pending

Column Display Preferences      Export To Excel



## Running Reports

From TRACE Dashboard select **Reports**

### Hospital Report

- Shows a summary of physician payments for duration of a contract & specified period.

### Physician Logs Report

- Provides summary and details of submitted physician logs for the specified period.

1. **Select Tab** for the report you would like to generate (**Hospital Report** or **Physician Logs**).

2. **Select Generate.**

3. **Select Contract Type.**

4. **Select the Agreement** for the report you would like to run. (Can select multiple options/reports)

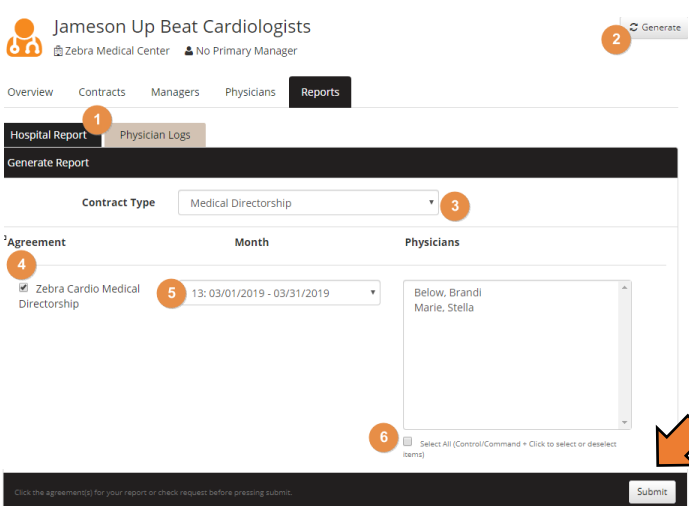
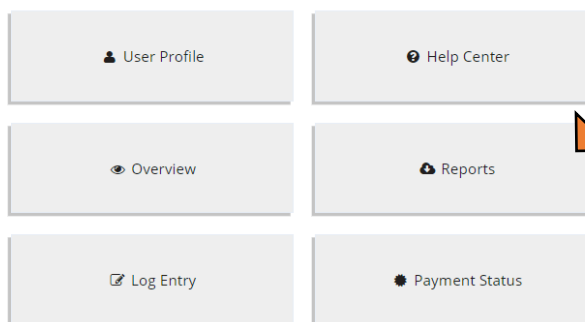
5. **Select period** (Month) for report.

6. **Select** one, or multiple **physicians** or "select all".

7. **Tap Submit**

**Note:** An Excel report will be generated and available to view/save. All reports are saved under the Reports tab

Welcome to TRACE Dashboard



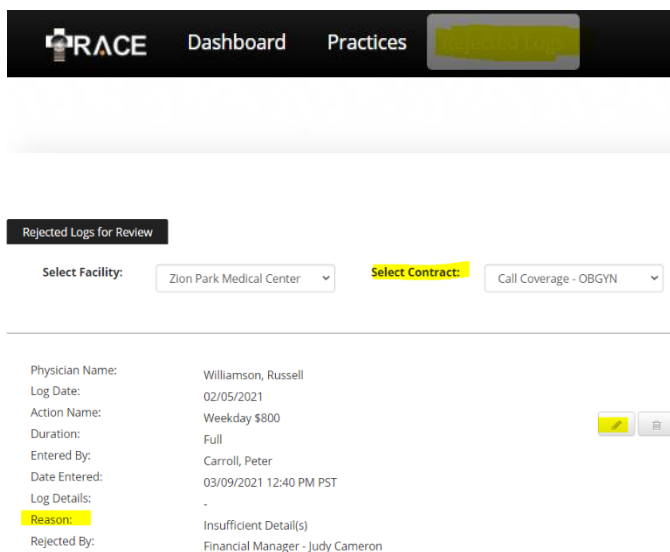
## Rejection Notifications

Practice Managers will be notified of any Log Rejections, if they submitted or approved logs on behalf of provider(s)

**A flashing Rejected Logs button** will appear at the top of the application. Click on the button and the contract(s) and provider log(s) that were rejected will appear with rejection reason(s).

Practice Manager can edit a log ( Pencil Icon) to resubmit, or Delete the log ( trash can) to remove the flashing button.

**NOTE:** Dates cannot be edited on a log; if dates need to be updated, the full timesheet will need to be rejected and unapproved by Manager so full edits can be made.



## NOTIFICATIONS & SETTINGS

### Reminder Emails & Notifications

#### PROVIDERS:

- All providers received reminder emails on the **1<sup>st</sup> and 10<sup>th</sup> of the month** to login to TRACE and complete time logs & approve for previous period.
- All providers using the TRACE App will also received push notifications from TRACE if they have allowed for notifications in App settings on device.
- Provider will immediately receive a confirmation email with time submission details after providing e-signature under each contract available.
- Providers may Opt-out of all emails and notifications per request to [TRACE@dynafios.com](mailto:TRACE@dynafios.com) or by notifying internal TRACE Admin.

#### FACILITY USERS:

**Automated emails** are sent immediately upon approval of logs by Provider or Facility Approver. Each subsequent approver will be automatically notified if they have a contract ready for review.

#### Initial Review/ Final Review Emails

Email reminders are additionally sent to all Approvers on two specified dates during the month (*Default is the 10<sup>th</sup> & 20<sup>th</sup>*) reminding user to login to TRACE and **'Approve Logs'**. If no logs exist to approve on specified dates, then NO email will be sent to user.

If user wishes to change reminder dates; please contact [TRACE@dynafios.com](mailto:TRACE@dynafios.com) to request a change or contact internal TRACE Admin User.



Dear Lauren,

This message is to notify you that there are currently Physician logs pending your approval related to your TRACE hospital- physician contracts.

Click [here](#) to go to the TRACE dashboard to review and approve physician logs.

Thanks,  
The TRACE Support Team  
[TRACE@dynafios.com](mailto:TRACE@dynafios.com)

Any users including Providers can opt-out of receiving reminder notifications. Please contact [TRACE@dynafios.com](mailto:TRACE@dynafios.com) to update preferences or contact internal TRACE Admin.