Huron Healthcare

ONTRAC® Insurance Verification Representative's Guide

A guide to using the online application for IV representatives

For Software Version 11.3

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Introduction

The ONTRAC® Financial Counseling (FC), Insurance Verification (IV), Pre-Registration (PR), and Practice software modules support the Huron Healthcare Revenue Cycle methodologies. They can all be installed together to help you register patients, secure account sponsorship, and collect patient liabilities. They ensure that you can perform the due diligence needed to complete work on the accounts in the system. You may be assigned worklists from one or more of the following ONTRAC modules:

- FC - monitor activities associated with screening and linkage to sponsorship options for uninsured or underinsured patients. FC may also involve arranging patient self-payment plans.
- IV - monitor the verification, authorization, and notification activities for insured accounts.
- PR - monitor activities related to pre-registering patients for scheduled procedures.
- Practice - monitor both access (sponsorship options) and authorization activities. Includes monitoring the verification of insured outpatients and activities associated with screening and linkage to sponsorship options for uninsured or underinsured patients and monitoring the authorization activities of outpatient accounts.

The ONTRAC software allows you to view and enter activity codes for accounts on your worklists using any computer on your intranet that has Microsoft Internet Explorer (version 6.0 and above). Using the ONTRAC software, you can:

- View accounts on worklists and enter activities directly online
- Batch and group patient accounts by filtering and sorting worklists
- Locate specific accounts using search functions
- Transfer and share accounts in real time
- Add accounts to worklists using STAT™-Edit
- View the current status and history for an account

About This Document

This document is written for representative users of the ONTRAC software. This document pertains only to the IV module. It assumes that you understand the Huron Healthcare Revenue Cycle methodologies applicable to your organization as well as the basic usage conventions of Microsoft Windows. To learn more about Windows, consult its online help and user's guide.

The ONTRAC software is designed to reflect the needs of your organization; as such the screen illustrations in this manual may differ from your installation.

User Types

There are two principal types of users of the ONTRAC software:

- **Representatives** use the ONTRAC software to view and update their worklists.
- **Supervisors** or **managers** use the ONTRAC software to check the status of particular representatives or accounts.

Worklists

The online worklists provide an organized list of accounts that require your attention. Worklists provide the following benefits that support the Huron Healthcare Revenue Cycle methodologies:

- Prioritization – Accounts are organized on the worklist with the most urgent, highest impact accounts listed at the top.
- Account Management – The worklists help you to manage required activity on accounts until they are completed. An account remains on your worklist until the required work is completed. You can assign a follow-up date (tickle date) so that an account is temporarily hidden from worklists until it can be worked further.
- Accountability – The worklists help drive accountability. An account is removed from your worklist only when you enter all the codes required, transfer it to another worklist, or manually delete it (you can only delete accounts in IV and PR).
- Measurement – Work completed on accounts invoices that appear on worklists can be regularly measured. Your activities are captured in the ONTRAC reporting tools. These measurements can be used to shape training, team goals, quality reviews, and expectations.

Accessing the System

The ONTRAC software provides access to your worklists from your intranet using any PC with Microsoft Internet Explorer installed. You must have a user login to use the ONTRAC software; you can get this login name and password from your client administrator.

Logging In

Once you have a user login and password, you can get started.

To log into the ONTRAC system

1. On a computer that is connected to the intranet, start Microsoft Internet Explorer.
2. In the Address bar, enter the path to the reporting portal login page (e.g. http://Portal Server/WebUI). Get this path from your client administrator.

   If you are authorized, you can save this location by adding it to the Favorites list in Internet Explorer or creating a desktop shortcut.

   - To add it to Favorites in Internet Explorer, click **Add to Favorites** on the **Favorites** menu and then click **OK**.
   - Add a desktop shortcut icon to this location by right-clicking in the page and clicking **Create Shortcut** in the shortcut menu.
3. On the Login page, type your **Login** ID and **Password**.

   Note Passwords are case sensitive.
4. Click **Login**.

   The reporting portal application window opens.
5. On the **Worklists** menu, click **ONTRAC** to open the ONTRAC Choose Worklist page.

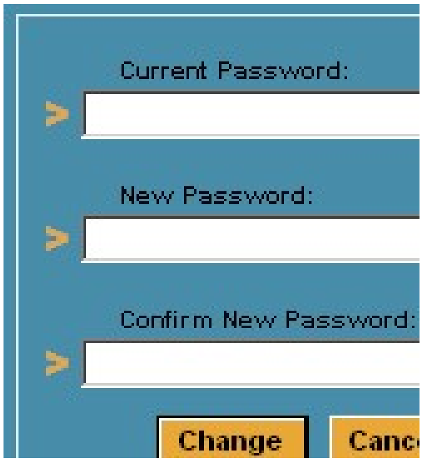
Changing Your Password

You will need to change your password the first time you log into the system. Change it periodically to ensure security. You must use 3 different passwords before you can reuse a previous password. Passwords are case-sensitive and should contain eight characters with at least one alpha, one numeric, and one punctuation character. If you forget your password, your client administrator can reset it.

Note: If you have a Windows login in the Portal, this function is not in your application because your password is managed through the Windows network. If you must change your Portal password, change your Windows network password.

To change your password

1. Log into the portal.
2. On the **Preferences** menu, click **Change Password**.



Change Password Page

3. Type your password in the **Current Password** box.
4. Type a new password in the **New Password** and **Confirm New Password** boxes.
5. Click **Change**.

Managing Your Help Menu

You can access the Documents page from the Help menu and you can create Favorites to access directly from your Help menu.

To access the documentation

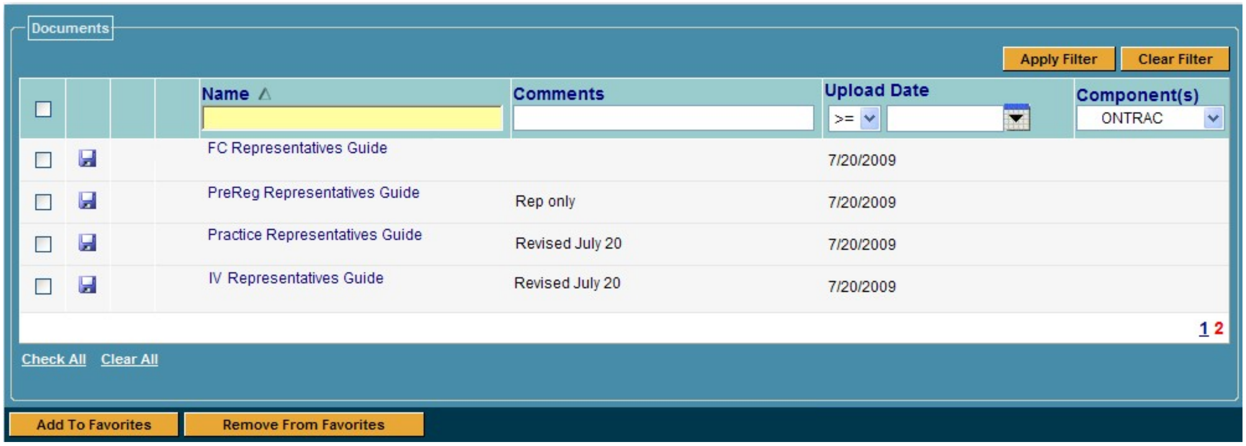
From the Help menu, click **Documents**.

Updating the Help Menu

Use the following procedures to add and remove favorite documents from your Help menu. The favorites are associated with your login; the system maintains a separate list of favorites for each user.

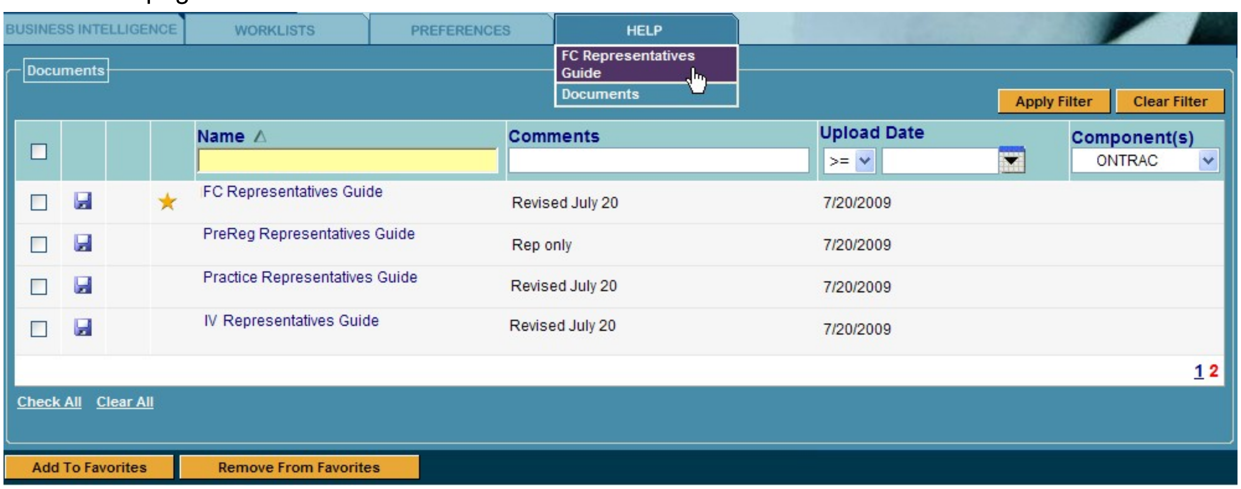
To add a favorite to your Help menu

1. From the Help menu, click **Documents**.
2. Click the checkbox for the documents that you want to appear on your Help menu.



3. Click Add To Favorites. If you have more than one page of documents, you need to click Add To Favorites on each page.

   The documents appear in your Help menu and are marked as a favorite with a star on your Documents page.



To remove a favorite from your Help menu

1. From the Help menu, click **Documents**.
2. Click the documents that you want to remove from your Help menu.
3. Click **Remove From Favorites**. If you have more than one page of documents, you need to click Remove From Favorites on each page that has a document you want to remove.

   The documents are removed from your Help menu but are still accessible from the Documents page.

Data Imports

At certain times of the day, the system may start importing data into the ONTRAC database. During an import, you may not be able to access your worklists or save any changes:

- The system may be disabled in the portal **Worklists** menu.
- A message appears on the page to inform you that an import is in process.
- Any changes that you try to save after the import starts may be lost.

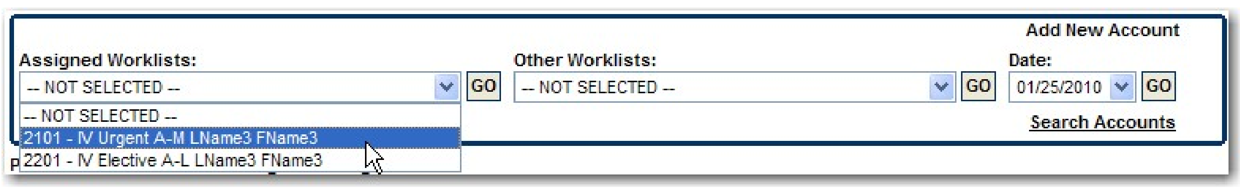
Components not affected by the import are still available in the portal. Check with your client administrator to see if, when, and how long any imports affecting you occur during your workday. Schedule your usage of the system accordingly.

Using Worklists

Once you have logged into the ONTRAC system, you can choose a worklist, which is a prioritized list of patient accounts that require your attention. There may be multiple worklists assigned to you.

To select a worklist to view

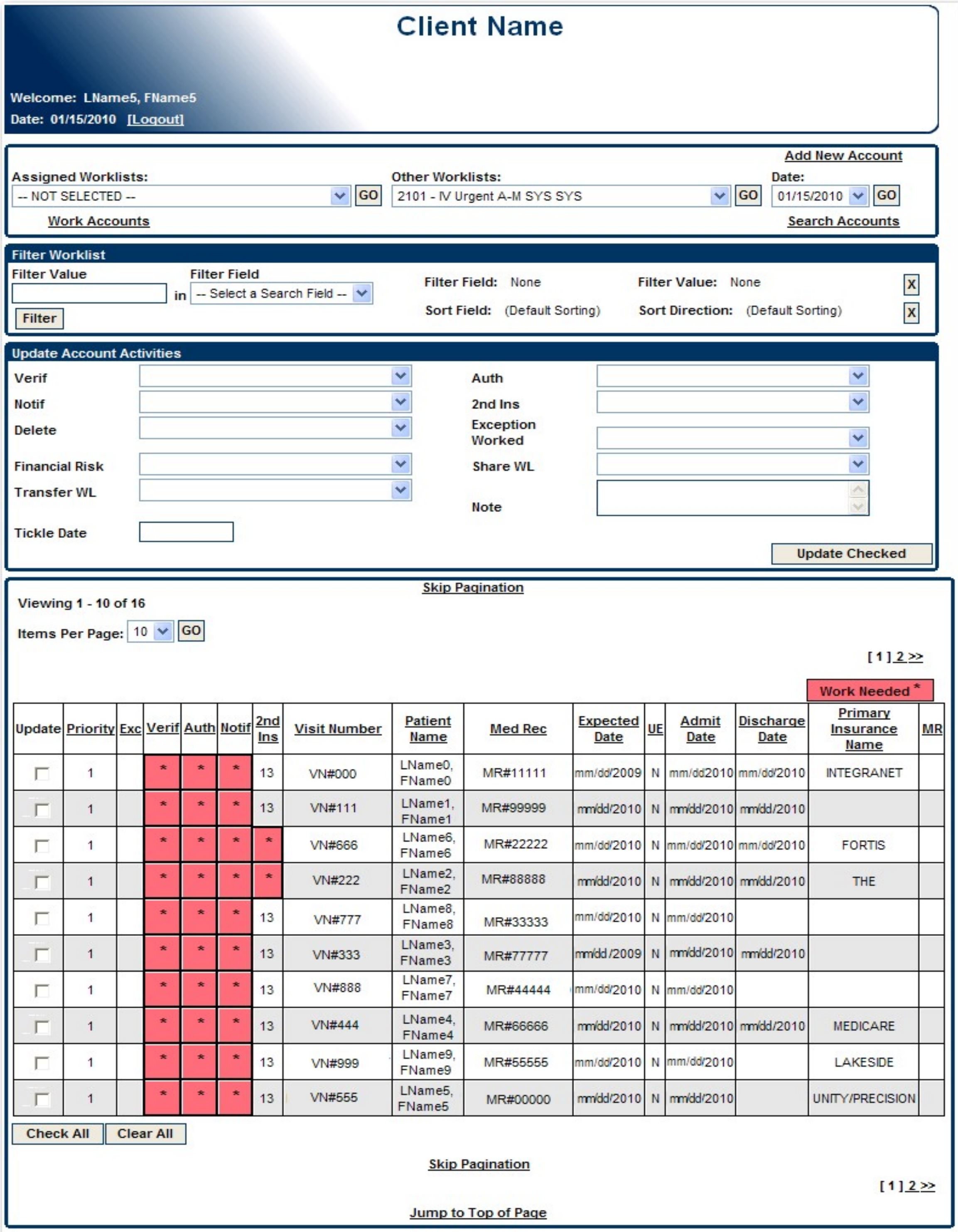
- Select one of your worklists from the **Assigned Worklists** box.
- If you do not have any assigned worklists or are working another representative's worklist, select it from the **Other Worklists** box.



Choose Worklist Page

Summary Listing Page

After you choose a worklist, its Summary Listing page is displayed in the Internet Explorer window. This page displays the table of patient accounts that makes up the selected worklist. It includes the activity codes, identifying account information, and key dates. The accounts are automatically sorted in priority work order. You should work the accounts in this order as much as possible. The activities that require work are in red boxes. To complete an account on an IV worklist, you must enter an activity code in the Verif, Auth, Notif, and 2nd Ins fields.



Client Name

Welcome: LName5, FName5
Date: 01/15/2010 [Logout]

Add New Account
Assigned Worklists: -- NOT SELECTED -- GO
Other Worklists: 2101 - IV Urgent A-M SYS SYS GO
Date: 01/15/2010 GO
Work Accounts
Search Accounts

Filter Worklist
Filter Value
Filter Field in -- Select a Search Field --
Filter
Filter Field: None
Filter Value: None
Sort Field: (Default Sorting)
Sort Direction: (Default Sorting)

Update Account Activities
Verif
Notif
Delete
Financial Risk
Transfer WL
Tickle Date
Auth
2nd Ins
Exception Worked
Share WL
Note
Update Checked

Skip Pagination
Viewing 1 - 10 of 16
Items Per Page: 10 GO
[1] 2 >>
Work Needed *

Update	Priority	Exc	Verif	Auth	Notif	2nd Ins	Visit Number	Patient Name	Med Rec	Expected Date	UE	Admit Date	Discharge Date	Primary Insurance Name	MR
	1		*	*	*	13	VN#000	LName0, FName0	MR#11111	mm/dd/2009	N	mm/dd2010	mm/dd/2010	INTEGRANET	
	1		*	*	*	13	VN#111	LName1, FName1	MR#99999	mm/dd/2010	N	mm/dd/2010	mm/dd/2010		
	1		*	*	*	*	VN#666	LName6, FName6	MR#22222	mm/dd/2010	N	mm/dd/2010	mm/dd/2010	FORTIS	
	1		*	*	*	*	VN#222	LName2, FName2	MR#88888	mm/dd/2010	N	mm/dd/2010	mm/dd/2010	THE	
	1		*	*	*	13	VN#777	LName8, FName8	MR#33333	mm/dd/2010	N	mm/dd/2010			
	1		*	*	*	13	VN#333	LName3, FName3	MR#77777	mm/dd/2009	N	mm/dd/2010	mm/dd/2010		
	1		*	*	*	13	VN#888	LName7, FName7	MR#44444	mm/dd/2010	N	mm/dd/2010			
	1		*	*	*	13	VN#444	LName4, FName4	MR#66666	mm/dd/2010	N	mm/dd/2010	mm/dd/2010	MEDICARE	
	1		*	*	*	13	VN#999	LName9, FName9	MR#55555	mm/dd/2010	N	mm/dd/2010		LAKESIDE	
	1		*	*	*	13	VN#555	LName5, FName5	MR#00000	mm/dd/2010	N	mm/dd/2010		UNITY/PRECISION	

Check All Clear All
Skip Pagination
[1] 2 >>
Jump to Top of Page

Summary Listing Page

There are low dollar variants of IV worklists that are called IVLO worklists. In these worklists, you may notice account updates or completions that you did not perform because the system can automatically code (autocode) activities. The relevant activity fields and column headers are labelled with IVLO.

Choosing Worklists and Accounts

At the top of the Summary Listing page, the following links and controls let you choose which accounts are displayed on the worklist table:

- **Search Accounts** – Search the entire ONTRAC system for patient accounts based on one or more of the following fields: Last Name, Account Number, Facility, Medical Record Number and Module Name (See Search Accounts).
- **Add New Account** – Add an account to your worklist. You can add accounts that are not yet in the ONTRAC system because they were not in the daily HIS download. You can also add accounts that are in the ONTRAC system but not on any worklist (See "Adding New Accounts").
- **Log Off –** Log off when you are done using the ONTRAC software.
- **Assigned Worklists –** Select one of your assigned worklists to display the accounts that you need to work.
- **Date** – Display your worklist as it would appear on a future date. This field is especially useful because it lets you see accounts on your worklist that have been tickled to a future date.
- **Other Worklists –** Select from worklists assigned to others that you are allowed to work.
- **Work Accounts –** Returns you to the last viewed worklist, refreshing the account listing.
- X **Sort –** Remove any sorting done on a worklist and display accounts in default sort order. You can sort a worklist by clicking a column heading (See "Sorting Worklists").
- X **Filter –** Remove the filter applied to a worklist. A filter is applied when you click a value in the worklist table or use Search Worklist (See "Filtering Worklists").
- **Search Worklist** – Search the current worklist by any column heading field (See "Search Worklist").
- **Sort Field/Sort Direction/Filter Field/Filter Value** – These labels show how the worklist table is currently sorted and filtered.

Worklist Table

The Summary Listing page displays the accounts on the selected worklist. The Verif, Auth, Notif, and 2nd Ins activity codes must be entered to work an account through the Insurance Verification process. You enter or edit these activity code fields using the Account Details page or the Update Account Activities section at the bottom of the Summary Listing page.

Skip Pagination

Viewing 1 - 10 of 16

Items Per Page: 10 GO

[1] 2 >>

Work Needed *

Update	Priority	Exc	Verif	Auth	Notif	2nd Ins	Visit Number	Patient Name	Med Rec	Expected Date	UE	Admit Date	Discharge Date	Primary Insurance Name	MR
☐	1		*	*	*	13	VN#000	LName0, FName0	MR#11111	mm/dd/2009	N	mm/dd2010	mm/dd/2010	INTEGRANET	
☐	1		*	*	*	13	VN#111	LName1, FName1	MR#99999	mm/dd/2010	N	mm/dd/2010	mm/dd/2010		
☐	1		*	*	*	*	VN#666	LName6, FName6	MR#22222	mm/dd/2010	N	mm/dd/2010	mm/dd/2010	FORTIS	
☐	1		*	*	*	*	VN#222	LName2, FName2	MR#88888	mm/dd/2010	N	mm/dd/2010	mm/dd/2010	THE	
☐	1		*	*	*	13	VN#777	LName8, FName8	MR#33333	mm/dd/2010	N	mm/dd/2010			

Worklist Table

Activity codes show the progress of an account in process. A new account appears on the worklist with these fields blank and displayed in the table as red boxes. After you enter or edit an activity code, it is displayed in the table. A code that denotes a complete state for an activity removes the red box. When every activity for an account is complete, it drops off the worklist.

You can do the following from the worklist table:

- Select boxes in the **Update** column to choose one or more accounts for the Update Account Activities section below.
- Click one of the activity code columns for an account to open its Account Details page, where you can view detailed account information and enter activity codes (See "Viewing and Editing Account Details").
- Click a column heading to sort the worklist.
- Click a value in the table to filter the worklist and redisplay it with accounts containing only the value you clicked.
- If the worklist table spans multiple pages, click a **page number** or **>>** to page through the table.

The following are identified within the worklist table:

- The **Exc** column shows the exception codes for accounts that were put on this worklist because of an exception to the standard assignment logic.
- The **UE** column is a Yes/No field that shows whether the user-entered expected date from the Add New Account page is being used for this account. (See "Adding New Accounts".)

Updating Account Activities

The Updating Account Activities section under the worklist table allows you to enter activity codes, indicate that exceptions were worked, share or transfer the accounts, enter notes, or enter a tickle date for follow-up.

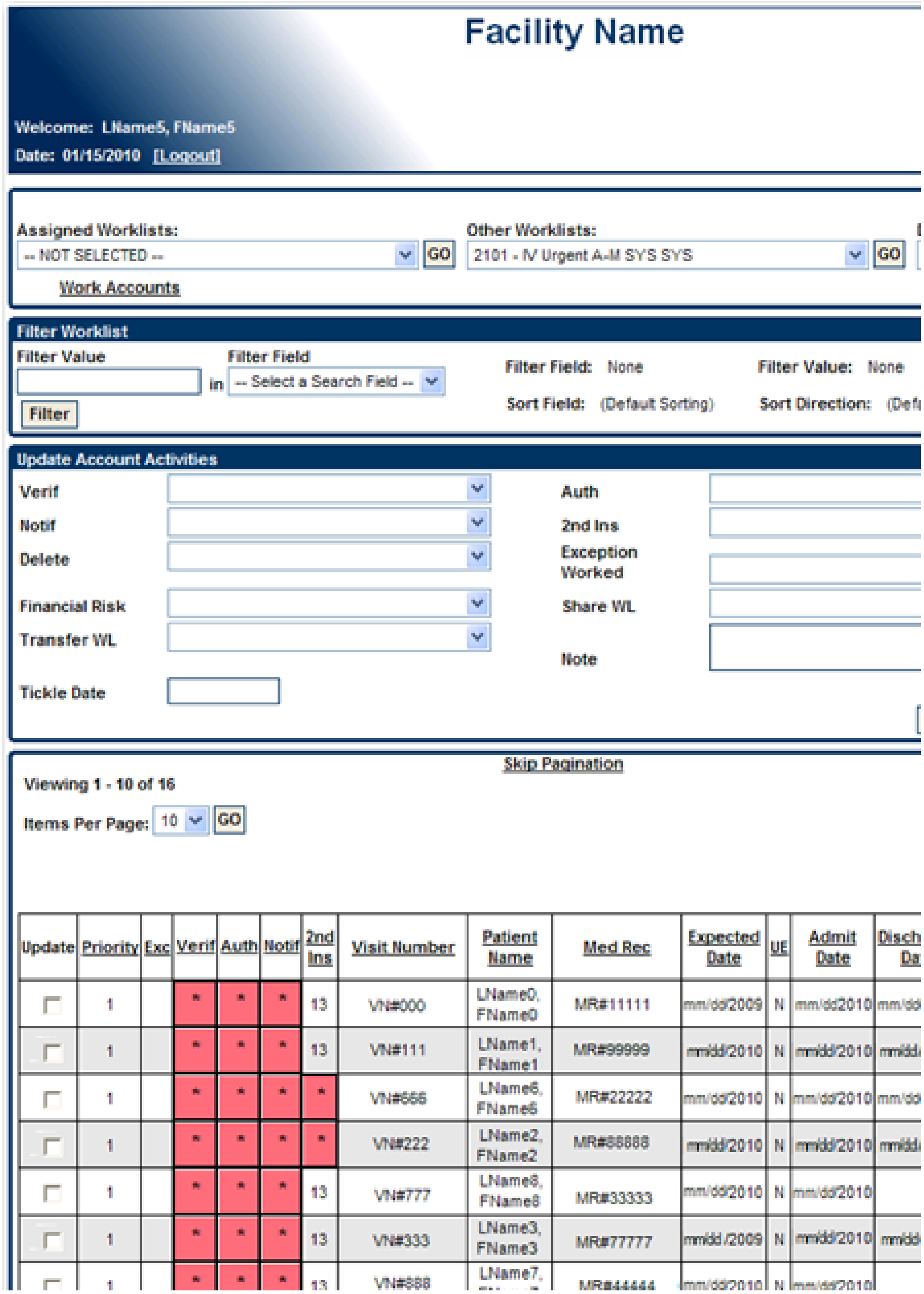
To edit account information for one or more accounts

1. Select accounts by selecting their **Update** check boxes.

   Click **Check All** or **Clear All** to select or clear the accounts on this page.
2. Under Update Account Activities, make your changes to the selected accounts.
3. Click **Update Checked** to apply the changes to the selected accounts.

Insurance Verification–IV Worklists

IV worklists show the status of the Insurance Verification accounts that you need to work today.



IV Worklist

The activity codes specific to IV include:

Verif – either the current verification status of the account or when it was last verified

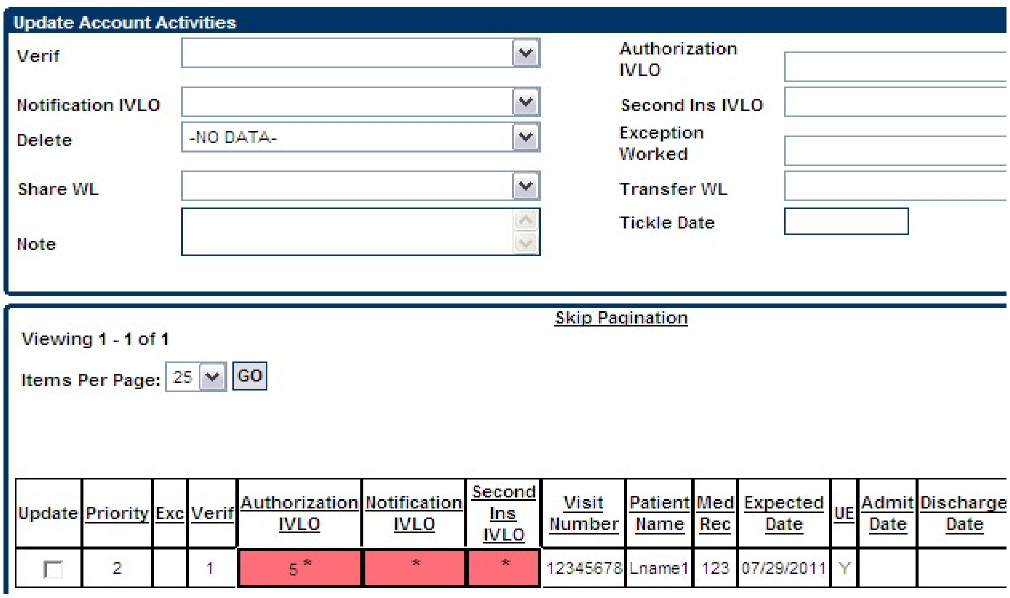
Auth – authorization status of the account

Notif – status of the notification of the insurance payer that patient has presented for service

2nd Ins – status of IV activity for secondary insurance

An MR in the **MR** column indicates that there is another account with the same medical record number that is currently on an IV worklist or was assigned to one in the past 14 days.

In IV Low Dollar worklists, the relevant activity boxes and column headers are labelled with IVLO. See Summary Listing Page.



IVLO Worklist Labelling

Viewing and Editing Account Details

You can view the detailed information about an account by opening its Account Detail page.

Open this page for the account you want to view by clicking one of the activity code columns in the Summary Listing page. You can also reach this page from the "Search Accounts" page.

Insurance Information

Primary FSC	BC	Secondary FSC	MIS2
Primary Payer Name	THE	Secondary Payer Name	HOMETOWN
Primary Payer Code	C0288	Secondary Payer Code	H0666
Group #	GRP#00000	Group #	GRP#00000
Policy #	POL#00000	Policy #	POL#00000
Primary Effective Date	MM/DD/YYYY	Secondary Effective Date	
Primary Payer Phone		Secondary Payer Phone	
Auth #		Auth #	
Primary Subscriber ID		Secondary Subscriber ID	
Primary Subscriber Name	LName9, FName9	Secondary Subscriber Name	
Primary Subscriber Relat	SELF	Secondary Subscriber Relat	
Primary Subscriber SSN		Secondary Subscriber SSN	

Medical Record Detail

Automatic Verification Detail

Account Status Code	1	Account Status Description	Active Coverage
Eligibility Date		Co-payment	
Co-insurance		Insurance Type	
Description		Deductible Amount - in network	
Deductible Amount - out of network		Deductible Remaining - in network	
Deductible Remaining - out of network		Out of Pocket Amount - in network	
Out of Pocket Amount - out of network		Out of Pocket Remaining - in network	
Out of Pocket Remaining - out of network		Hospital Status Code	
Hospital Status		Hospital Co-Insurance percent	
Hospital Inpatient Status Code		Hospital Inpatient Status	
Hospital Inpatient Co-Insurance percent		Hospital Outpatient Status Code	
Hospital Outpatient Status		Hospital Outpatient Co-Insurance percent	
Hospital Ambulatory Status Code		Hospital Ambulatory Surgery Status	
Hospital Ambulatory Surgery Co-Insurance percent		Error or Warning Message	

Account Status

Worklist	Description	Worklist Type	On WL	In Date	Out Date	Tickle	In Reason	Out Reason	Transfer Rep
2101	IV Urgent A-M	NoVA	Yes	01/28/2010 9:49AM			System		

History

Jump to Top of Page

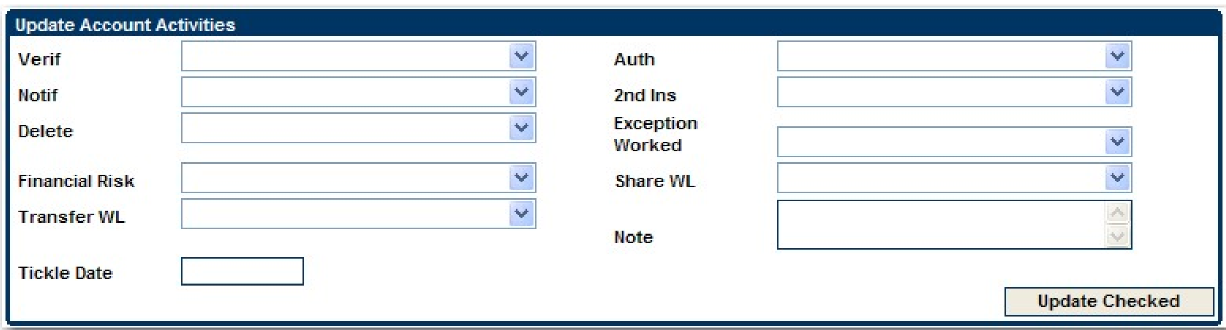
IV Account Detail

The Account Detail page consists of the following sections:

- **Worklists** – At the top of the page, this section is shared with the Summary Listing page (See "Using Worklists").
- **Account Activity** – Enter activity codes that describe the activities done for this account.
- **Information** – Contains basic information about this account such as patient name, address, visit number, social security number, etc.
- **Visit Information** – Shows detailed information about the patient visit associated with this account including key dates, diagnosis, procedure, etc.
- **Insurance Information** – Displays the insurance data for this patient.
- **Medical Record Detail** – This section only appears on the IV, PR, Access, and Authorization worklists. Shows basic information for other accounts for the same patient in the same module that either are currently on a worklist or were assigned to one in the past 14 days.
- **Automatic Verification Detail** - Displays verification details received from the payer through Electronic Data Interchange (EDI).
- **Account Status** – Displays the current status and history for an ONTRAC account.

Updating Account Information

Use the Account Detail page to view, enter, or edit the activity status codes for an account. In the Account Activity section of this page, you can enter codes, transfers, shares, dates, times, and notes.



IV Account Activity

To enter information about work done on an account

1. On the Summary Listing page, click one of the activity code columns for an account in the worklist table.

   The Account Detail page opens.
2. In the Account Activity section, enter or edit the data for the fields that need to be updated.
   - **Account activity codes** – Click these boxes to select applicable codes. You can get a listing of what these codes mean from your client administrator.

     The IV codes include **Verif** – for verification, **Auth** – for authorization, **Notif** – for notification, **2nd Ins** – for secondary insurance, **Delete** – for removing accounts from IV and coding the reasons for removal, and **Expected Liability** – amount that the patient owes.
   - **Exception Worked** – Enter the code for an exception that was worked for this account. Use this field after you complete work on an account that appeared on the worklist due to an exception. If the account is otherwise completed, it drops off the worklist.

- **Financial Risk** – Enter the code for any applicable financial risk category associated with this account.
- **Sharing Accounts** – The **Share WL** field is used to share accounts between multiple representatives. You can share an account by clicking the **Share WL** box and selecting the worklist that you want to share the account with. When you update this page, this account appears in both the current and shared worklist. You will use the Transfer WL function more often than Share WL. Sharing accounts is rarely done but transferring an account is much more common.
- **Transferring Accounts** – To transfer this account to another worklist, click the **Transfer WL** box and select a destination worklist. When you update this page, this account is removed from the current worklist and added to the destination worklist. Accounts are typically transferred when they need to be worked by another representative or reviewed by a manager or supervisor.
- **Account Note** – Type remarks about this account in the **Note** field. Notes can be particularly useful if you want a reminder for yourself or the representative who is getting this account through a transfer or share. Be sure to add the note to your HIS as well.
- **Account Tickling** – If you do not need to work on an account for a few days, you can tickle it to a future date. Assign a tickle date if you do not plan on completing work on the account today. Enter a date in the **Tickle Date** box. When you update this page, the account disappears from the current worklist and will reappear on the specified date.

3. Click **Update**.

   The Summary Listing page for the current worklist is redisplayed and all the changes that you made are saved.

Activity Codes

See the following table for description and usage of activity codes.

Code	Description	Usage
Insurance Verification		
Verification		
-1	Ineligible	Account with any type of insurance that is found to be ineligible.
1	January	Medicaid or COBRA account that is eligible for January
2	February	Medicaid or COBRA account that is eligible for February
3	March	Medicaid or COBRA account that is eligible for March
4	April	Medicaid or COBRA account that is eligible for April
5	May	Medicaid or COBRA account that is eligible for May
6	June	Medicaid or COBRA account that is eligible for June
7	July	Medicaid or COBRA account that is eligible for July
8	August	Medicaid or COBRA account that is eligible for August
9	September	Medicaid or COBRA account that is eligible for September
10	October	Medicaid or COBRA account that is eligible for October
11	November	Medicaid or COBRA account that is eligible for November
12	December	Medicaid or COBRA account that is eligible for December
13	Eligibility Verified	Eligibility has been verified successfully
14	Verification Attempted	Verification has been attempted but cannot be completed due to payer unavailability
Notification		
1	Notification Attempted	Notification has been attempted but could not be completed due to payer unavailability

Code	Description	Usage
9	Notification Required At Admit	For scheduled accounts only; notification is required at admit.
10	Notification Not Required	Notification is not required by insurance company. Can also use for Medicaid/Medicare.
11	Notification Completed	Insurance was notified.
Authorization		
1	Authorization Attempted	Authorization was attempted but cannot be completed due to payer unavailability.
5	Pending Payer Action	Authorization is pending action from the payer.
6	Pending UR Action (Non-Scheduled)	For urgent accounts only; authorization is pending action from UR
7	Pending Physician Action	For scheduled accounts only; authorization is pending action from the physician
8	Authorization Denied	Authorization has been denied by the insurance company.
10	Authorization Not Required	Authorization is not required by the insurance company; can also be used for Medicaid/Medicare accounts
11	Authorization Obtained	Authorization has been obtained successfully
2nd Insurance		
1	2nd Insurance Authorization Pending	Authorization for 2nd insurance is pending but not pending payer.
5	2nd Insurance Pending Payer Action	Authorization for 2nd insurance is pending payer.
6	2nd Insurance Pending UR Action	For urgent accounts only; authorization is for 2nd insurance is pending action from UR
7	2nd Insurance Pending Physician Action	For scheduled accounts only; authorization for 2nd insurance is pending action from the physician.
10	2nd Insurance Termed/Not Existing	2nd insurance has termed and is no longer a source of insurance
11	2nd Insurance Verified and Authorized	Verification and authorization have been completed successfully for the 2nd insurance
13	No 2nd Insurance Pending	Auto populates when the secondary carrier is blank
Delete		
1	Out of Scope	Use this code if the account type is not normally worked by IV. It does not need to be worked in the ONTRAC system.
2	Canceled Pre-Admit	For scheduled accounts only, the patient canceled the appointment and IV functions are not necessary.
3	Supervisor Delete	Supervisor access only, the supervisor can delete accounts under special circumstances.

Account Status

The Account Status section is located at the bottom of the Account Detail page. It shows the latest worklist information for this account.

Account Status									
Worklist	Description	Worklist Type	On WL	In Date	Out Date	Tickle	In Reason	Out Reason	Transfer Rep
2101	IV Urgent A-M	NoVA	Yes	01/28/2010 9:49AM			System		

Account Status

There may be multiple rows depending on whether an account has been assigned, transferred, or shared to the worklist types that are tracked here.

The table has the following columns:

- **Worklist**, **Description**, and **Worklist Type** – identifies the current or latest worklists for the account

- **On WL** – indicates whether the account is currently on the worklist specified by the row
- **In Date** / **Out Date** – date and time when the account was put on or removed from the worklist
- **Tickle** – tickle dates for this worklist account, if applicable
- **In Reason** – reason account came onto the worklist
- **Out Reason** – reason account left the worklist
- **Transfer Rep** – representative code of the user who transferred the account, if applicable

Account History

The Account History consists of all the changes to the account within the ONTRAC system. To see the account history, click **History** at the bottom of the Account Detail page. The Viewing Account History window displays the previous coding activity for the account. It opens the tab for the current module. The history table columns vary depending on the selected tab.

FC | NoVA | IVLO | Collections | POSCheckIn | PreReq | Reservation | Access | Auth | Practice

Account History

Visit Number	Date	Time	Rep Code	Exc	Worklist	Verif	Auth	Notif	Second Ins	Delete	Exception Worked	Transfer/ Share WL	Tickle
VN#00081	01/14/2010	9:50AM	SYS		2101				13				

Account History

In the Account Detail page, changing an activity code or updating the Share WL or Transfer WL field and clicking Update, results in a new entry in this table. Each update is displayed as a new row on the table with the most recent one at the top.

The table has the following columns:

- **Visit Number** – Account number
- **Date/Time** – when the account change occurred
- **Rep Code** – representative code of the user who changed the account
- **Exc** – exception code for the account change, if applicable
- **Worklist** – worklist that this account was on when it was changed
- ***Activity codes*** – values of the activity codes for this account in this module (depends on the selected module tab)
- **Transfer/Share WL** – if an account is transferred to or shared with another worklist, the code for the destination worklist for this action. Transfers and shares are only logged in the tab for the worklist account where they were initiated.
- **Tickle** – tickle dates for the account, if there is one

Click one of the tabs to switch to the history table for a different module for this account.

Searching for Patient Accounts

There are two ways to search for accounts in the ONTRAC system:

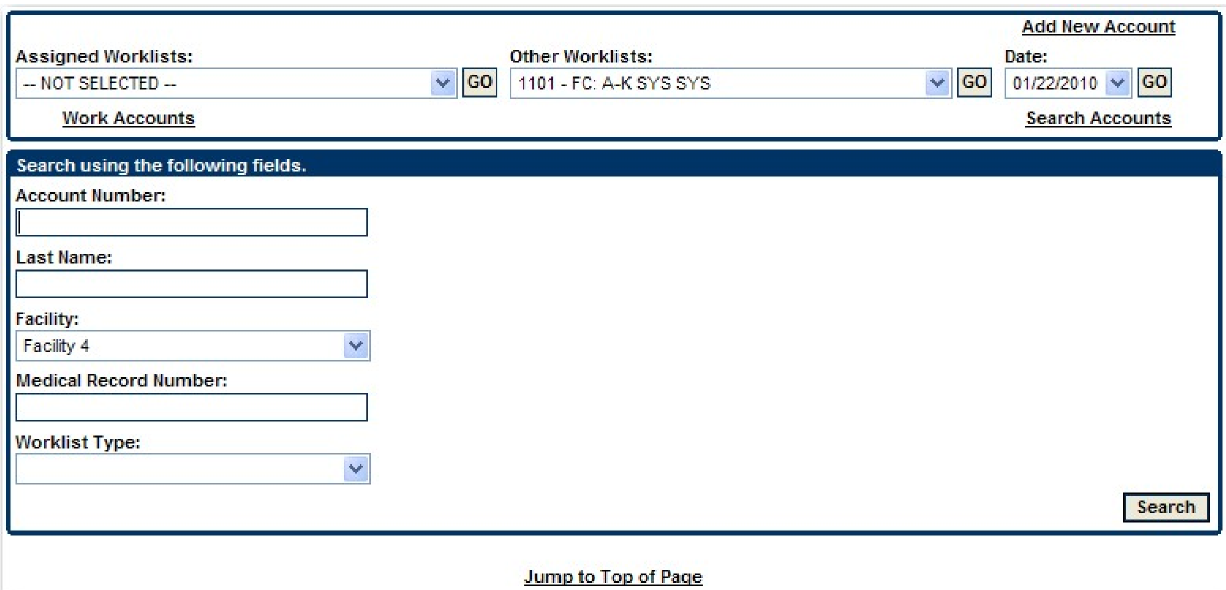
- Click **Search Accounts** to look for accounts in the entire ONTRAC system.
- Use the **Filter Worklist** box to look for accounts only on the currently displayed worklist.

Search Accounts

Use the **Search Accounts** link near the top of the Summary Listing or Account Detail page. Search Accounts lets you search all the accounts in the ONTRAC system by Last Name, Account Number, Facility, Medical Record Number, and/or Worklist Type. This method can find accounts that are not on your worklists.

To search all accounts in the ONTRAC system

1. Click **Search Accounts**.



Search Accounts

2. Enter the values to search for in the appropriate boxes.
   Not all boxes need input to execute a valid search, however, entering more data helps to narrow down the search results.
3. Click **Search**.

   The results of this search are displayed in a table in the Viewing Search Results page.

The following example shows a search with "lname10%" in **Last Name** and "Facility 1" in **Facility.** The % is a wildcard character (See "Wildcard Search").

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Viewing 1 - 5 of 5

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Med Rec	Account Number	Patient Name	Worklist	WL Desc	Facility	Admit Date	Discharge Date	Medical Service	Worklist Type	In Date	Out Date	Followup Date	Detail...
MR#55555	ACT#555	LNam101, FNam101	7110	Access A - Z	1	mm/dd/2009	mm/dd/2009	CLINIC	Access	mm/dd/2010			Detail...
MR#00000	ACT#222	LNam102, FNam102	4310	IHC A-Z	1	mm/dd/2010		ORA	Collections	mm/dd/2010			Detail...
MR#44444	ACT#99999	LNam103, FNam103	3111	Pre Reg N - Z	1	mm/dd/2010		ORA	PreReg	mm/dd/2010	mm/dd/2010		Detail...
MR#66666	ACT#111	LNam104, FNam104	1102	FC: L-Z	1	mm/dd/2010		SURG	FC	mm/dd/2010			Detail...
MR#33333	ACT#88888	LNam105, FNam105	6110	Auth A - Z	1	mm/dd/2010	mm/dd/2010	RADIOL	Auth	mm/dd/2010			Detail...

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Jump to Top of Page

Search Accounts Results

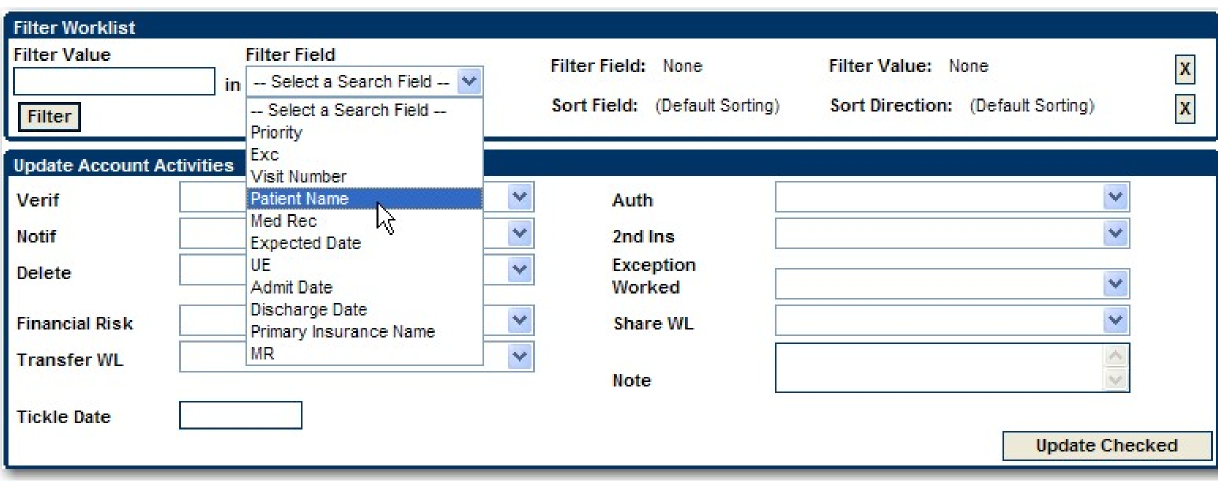
4. Click **Detail** in the last column to view the Account Detail page for an account in this table.

Search Worklist

The second way to search for accounts is to find accounts on the currently displayed worklist by using the **Filter Worklist** box. You can search any of the column heading fields from the worklist table on this page.

To search the currently displayed worklist for accounts

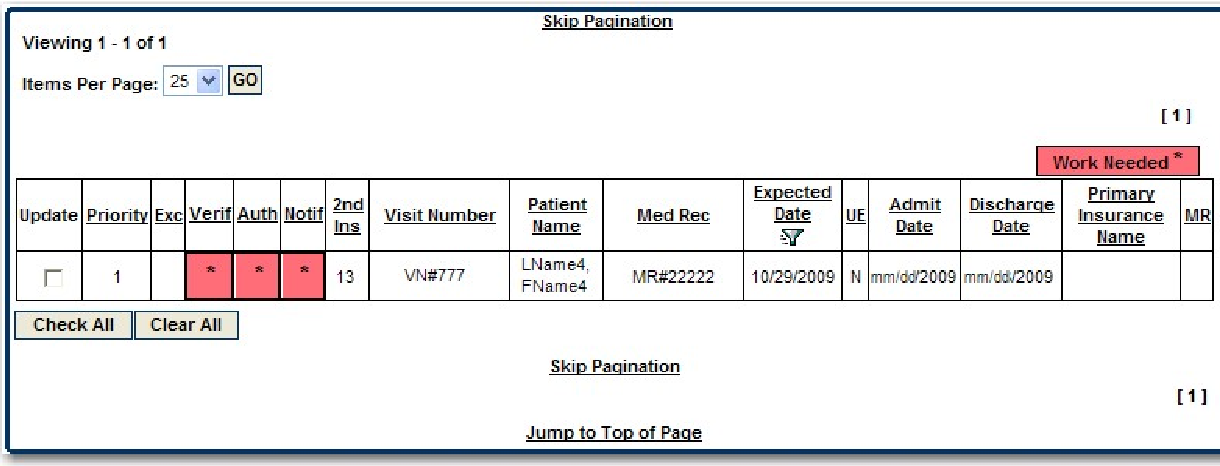
1. Type a value to search for in the **Filter Worklist** box.
2. Select the column-heading field to search in the **Filter Field** box.



Search Worklist

3. Click **Filter**.

   Only accounts where the filter value matches the selected field are displayed. In this example, the search returned one account on the worklist. The filter icon appears under the column heading that you searched. The Filter Field and Filter Value labels show the current search criteria.



Search Worklist Results

Wildcard Search

When searching for accounts, you can use the wildcard character % (percent sign) to find accounts. It is useful when you do not remember the exact value that you are trying to find. In a field, use the % in your text input to match any one or more characters.

For example, if you can only remember the first part of a patient's last name, append % to the input text in the **Patient Last Name** field to find names that begin with that text. Entering **Will%** returns all accounts with last names beginning with Will, such as Will, William, Williams, Williamson, etc.

Filtering Worklists

On the Summary Listing page, you can filter your worklist using a single click to view only accounts that have the same values in the selected field. This is method is basically a shortcut for Filter Worklist.

To filter accounts on a worklist:

1. In the worklist table, point to a value by which you would like to filter.

   The Filter tool tip Filter... appears under the mouse pointer to let you know that you can filter by that field.

2. Click the value.

   The filter icon appears under the filtered column heading. The Filter Field and Filter Value labels show the filter criteria.

3. Click the X button to redisplay the original worklist table.

Sorting Worklists

You can sort the worklist table according to the values in a column by clicking the column heading. Clicking the column again reverses the sort.

To sort accounts on a worklist

1. In the worklist table, point to any of the column headings.

   The Sort By tool tip Sort By... appears under the mouse pointer to indicate that you can sort here.
2. Click the column heading.

   The worklist is redisplayed with the values sorted in descending order. The Sort Field and Sort Direction labels show the sort criteria.
3. Click the column heading again to toggle from descending to ascending order.
4. Click the X button to redisplay the worklist table in its default order.

Adding New Accounts

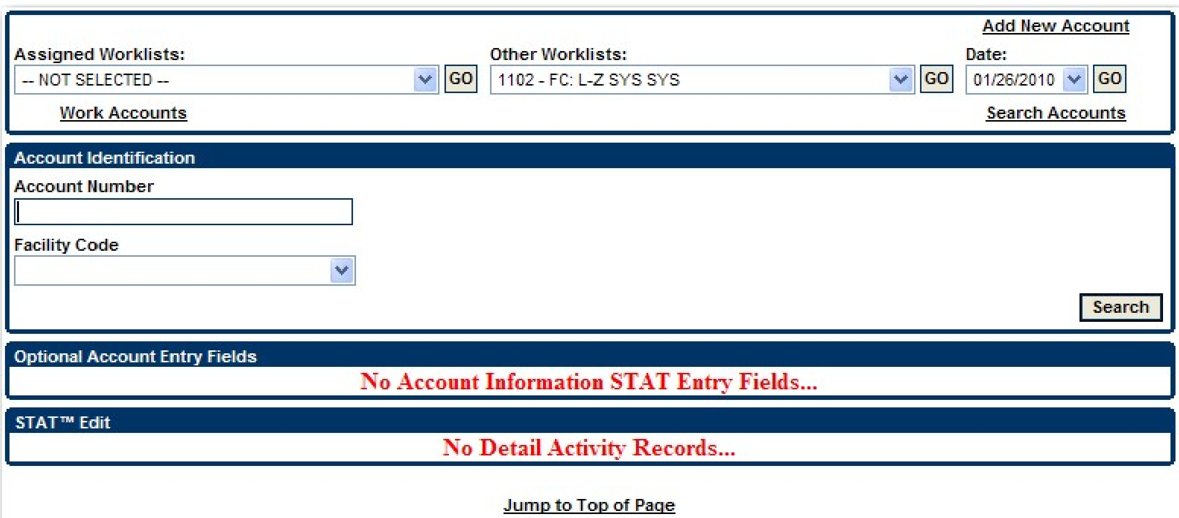
You may need to code activities for an account that is not on a worklist (e.g. it may not have been imported into the ONTRAC system yet). You can add a new account to the current worklist by using the **Add New Account** link near the top of the Summary Listing page.

Before you can add a new account, you must search for it number and facility code to see if it already exists in the ONTRAC system. If it does not exist, you can create a new account and add it to your worklist; this account should be synchronized later during the ONTRAC data download from the HIS (Hospital Information System).

If you find that the account already exists, you can modify it, although it is better to use Search Accounts (See "Search Accounts") to open the Account Detail page for existing accounts because it provides the complete list of fields specifically used by all modules.

To add a new account to a worklist

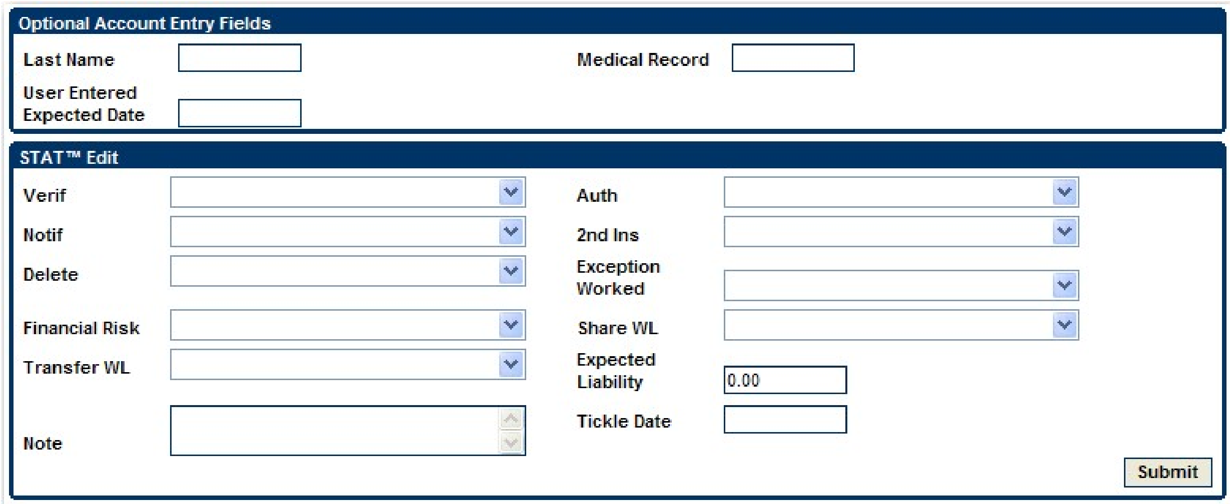
1. While viewing the Summary Listing page for a worklist, click **Add New Account**.



Add a New Account to a Worklist

2. Under Account Identification, enter an **Account Number**—this value is required to perform a search.
3. Select a code from the **Facility Code** box—this value is also required for a search.
4. Click **Search**.

   If the account is already in the ONTRAC system, the Last Name, Medical Record Number, and values for fields that have already been entered automatically appear below. If the account is not already in the ONTRAC system, the fields remain blank. The fields under STAT Edit vary depending on which type of worklist you are adding the account to.



STAT Edit for IV Worklists

5. Under STAT Edit, enter or update fields as necessary and click **Submit**.
   - If the account is not already in the ONTRAC system, it is added to your worklist unless you have tickled it forward to a future day. In this case, the account will appear on your worklist on the specified tickle date. The account is added to the facility you selected in the **Facility Code** box under Account Identification.
   - If the account is in the ONTRAC system and assigned to another representative's worklist, it is updated but not added to yours, unless you transfer the account to your worklist.
   - If the account is coded as complete, it does not appear on your worklist.

Logging Off

When you are finished using the ONTRAC software, log off the system by clicking **Log Off** at the top-right corner of the page. If you time out of your worklist, you need to log back on to the worklist from the portal (See "Using Worklists").

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10/2011