USER GROUP MEETING
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Topic
Getting Started with Tasking and Worklog

Level
100
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Session Guidelines

• Silence all cell phones
• Questions will be addressed at the end of the presentation
• Refrain from personal discussion
Show of hands....
How many are not using Tasking in PM?
And for those that are…
Who would like to use it more effectively?
If you raised your hand.....
Congratulations!
Should I start using Tasking in my practice?

Absolutely !!!
Agenda

• What is Tasking?
• How and where do tasks get created?
• How and where do I work and complete my tasks?
• How can I manage and track others’ tasks?
• What are some setup requirements?
• What are some examples of task types that I can start with?
• Preview of Coming Attractions - Enhancements
What is Tasking?

NextGen Tasks/Worklog Manager is a powerful tool that can be used to automatically or manually assign and complete specific tasks.

Tasks can automate workflow in a typical medical office.
How can Tasking benefit you?

• Create “To Do” items and lists for staff
• Define completion importance and priorities
• Spend less time searching for work – let the system work for you!
• Complete jobs more quickly
• Better documentation of work done
• Build accountability, auditing, and reporting
Where do tasks get created in PM?

Appointment Book
Where do tasks get created in PM?

Appointment Lookup
Where do tasks get created in PM?
Where do tasks get created in PM?
Where do tasks get created in PM?

Charges,
Payments,
Reports,
And many more!
Worklog Manager

The Worklog Manager is the place to work tasks assigned to you, or to manage and track tasks assigned to others.
There are several ways to access Tasks within PM:

1. **My Tasks** displays open tasks assigned to you or workgroups you are a member of.
Accessing Tasks

There are several ways to access Tasks within PM

2. Task Notification on Status Bar
Accessing Tasks

Clicking the icon on the Status Bar will open Worklog Manager and filter for “My Tasks”
Accessing Tasks

There are several ways to access Tasks within PM

3. Advisor Window: clicking the links will open Worklog Manager
Working Tasks

![Image of task management software interface]

Change to In Progress
Use tabs and menus to view and access other info.

Add Notes
Assign to yourself
Set Follow up or Due Dates
Completing Tasks

Optionally enter Completion Reason

Change Status to Completed

Completion Date and Completed By can be defaulted or manually entered
Setting up Tasks – File Maintenance

Task Workgroups

• Allow for tasks to be assigned to role-based groups, containing multiple users.

• All users who are members of the group will see the tasks in their Worklog
Task Workgroups

Master Files > Practice > Task Workgroups
Setting up Tasks – File Maintenance

Task Completion Reasons

- Used to indicate the reason a task is being completed
- Can be useful for reporting and auditing of completed tasks
- Can be required or optional, depending on Practice Preference settings.
Task Completion Reasons

Master Lists > Task Completion Reasons
Setting up Tasks – File Maintenance

Task Types

- Task Types can be created for manual tasking, or setup to be auto-created based on business rules
- Task Types can be set to Auto-Complete if certain conditions exist
- Tasks can even be setup to actually do some of the work for you!
Start Simple – Manual Task Type

Master Files > System > Task Types

- “Two” mandatory fields
  - *Task Type* – Name of the task
  - *Source Type* – Encounter, Appointment, etc.
- Additional Fields recommended
Task Types - Manual

Let’s create a task type that will allow a user to create a task when making an appointment if they see that an authorization or referral is not on file, and might be needed....
Task Types - Manual

Source Type indicates where the task will be created.

If tasks are usually assigned to specific individuals or workgroups, defaults can be set here.
Auto Completion options can be set to have tasks completed if certain conditions happen.
Take it to the Next Level: Auto-Created Tasks

Master Files > System > Task Types

- Tasks will be auto-created by the system based on defined criteria
- Auto-created tasks will be assigned to specified users or workgroups
- Assignment of tasks can optionally be different based on location, provider, or payer
Task Types – Auto-Create

Example: Create a task type that will be auto-created for every account where the Print Statements indicator is turned off....
Print Statements Indicator Task

[Image of the Print Statements Indicator Task window with the Task Type set to Print Stmts Off - Account.]
Print Statements Indicator Task

- Print statements indicator turned off for more than 30 days
  - Parameter 1: 30

Options:
- Auto Creation
  - Default Assigned To: for all selected
- Exclude encounters in budget status for applicable auto create actions

Activate:
- Guarantor responsibility is greater than 0 days old from Unknown and guarantor balance between $0.00 and $0.00, third party balance of $0.00
- Guarantor responsibility is greater than 0 days old from Unknown and the guarantor balance is greater than $0.00
- Minimum budget payment not met
- Minimum budget payment too low for account balance
- Print statements indicator turned off for more than 30 days
- Third party balance greater than $0.00
- Third party balance less than $0.00
- Total balance greater than $0.00
- Total balance less than $0.00

- Processed: Nightly

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Print Statements Indicator Task

Set Auto-Completion so that task is marked as completed when the statements indicator is turned back on!
Task Types – Auto-Create

Another example… Create a task type that will be auto-created for insurance balances on encounters that are 45 days or older....
Insurance Follow-up Task
Insurance Follow-up Task

If desired, tasks can be assigned differently based on location, rendering provider, or payer/financial class.
Insurance Follow-up Task

Set Auto-Completion actions so that task can be completed by the system.
Now Really Use the Power: Auto-Worker Tasks

Master Files > System > Task Types

• Tasks will be auto-created by the system based on defined criteria, as shown in the previous examples

• With the Auto-Worker settings, some function will be done for you

• The Task will then be completed after the work is completed
Task Types – Auto Worker

For example... Task will be created for all accounts with a patient balance of more than $50 that are 30 days past due... AND a collection letter is attached to the account so that it can be sent in the next batch of letters that are printed.
Account Auto-Worker Task

Right-click/Open to set parameters.

Task Type Options

Parameter 1:
30

Parameter 2:
Date of Patient Responsibility

Parameter 3:
50

default assigned to 
Account is greater than 30 days old from <Date of Patient Resp> and guarantor balance is greater than $50.00
Account is greater than 0 days old from <Unknown> and 3rd party balance between $0.00 and $0.00
Account is greater than 0 days old from <Unknown> and 3rd party balance is greater than $0.00
Account is greater than 0 days old from <Unknown> and total balance is greater than $0.00
Account statement counter is equal to 0 and guarantor balance is between $0.00 and $0.00
Account statement counter is greater than 0
Account statement counter is greater than 0 and guarantor balance is greater than $0.00

create actions
Override assigned to Processed
- Nightly
- Nightly
- Nightly
- Nightly
- Nightly
- Immediately
- Nightly
- Nightly
- Nightly
- Nightly
Task Reporting

Reports allow users and managers to track task status, completion and all other details for their organization.
Coming Attractions – Future Enhancements

Enterprise Worklog
• Allows a user to view and work tasks across practices
• Enabled at a user level
• Automatically switches between practices when practice specific data is requested (view chart, for example)

Small Balance Write Off
• Added to the account level
• Will have the ability to include credits if desired
Any Questions?

For more information, please stop by the Hands-On Room!
Session Survey

Please take a moment to complete a brief survey regarding this session.

1. Open your ONE UGM Mobile App (please note: you must have already logged in and accepted the “Terms of Use” to access this feature)
2. Click the Navigation Button at the top left of the screen
3. Select “Sessions”
4. Search for and select this session
5. From the sessions details screen, select “Survey” at the bottom right of the screen
6. Remember to hit “Save” at the bottom of the survey once you have answered the questions