



Operations (Ops) Worklists Process Guide

Provider User Guide

Contents

Operations Worklist	1
Overview	1
HHAX System Key Terms and Definitions	1
Worklist Example	2
User Setup	3
Worklist Task Management	4
Search Options	5
Task Action Menu	6
Task Status	7
Assigning Tasks	8
Unassign Task Enhancement	8
Entering Notes	9
Send Messages from Actions Menu	9
Exporting Search Results	11
Expiring Medicals/Other Compliance Worklist	12
Worklist Search Filters	12
Worklist Details Provided	13
Additional Task Actions	13
Send Message: Copy Task Info Button	14
Deleted Compliance Items Marked Completed in Worklist	15
Automated Notes	16
Expiring Authorizations Worklist	17
Worklist Search Filters	17
Worklist Details Provided	18
Unstaffed Visits Worklist	20
Worklist Search Filters	20
Worklist Details Provided	21
Automated Notes	22
Expiring Master Week Worklist	23
Worklist Search Filters	23
Worklist Details Provided	24
Automated Notes	25

Operation Worklist Setup	26
Expiring Caregiver Medical/Other Compliance Worklist	26
Expiring Authorization Worklist	26
Unstaffed Visits	27
Expiring Master Week	28
Expiring Certification Period	29

Operations Worklist

Overview

DISCLAIMER

This feature is activated by HHAX System Administration. Please contact [HHAX Support Team](#) for details, setup, and guidance.

An **Operations (Ops) Worklist** provides an efficient means of managing day to day tasks in the HHAExchange (HHAX) system, to include (but not limited to):

- Managing expiring Medicals/Evaluations
- Staffing TEMP visits
- Managing expiring Authorizations

Each worklist corresponds to a specific event (task type), predefined in the system to activate the creation of the task and routing it to the appropriate worklist. From the worklist, an assigned user performs required conditions to complete the task.

This category covers the **Ops Worklists** functionality in the HHAExchange (HHAX) system, offering guidance and instructions on how to access, assign, and complete worklists.

Please direct any questions, thoughts, or concerns regarding the content herein to [HHAExchange Customer Support](#).

HHAX System Key Terms and Definitions

The following provides basic definition of HHAX System key terms applicable throughout the document.

Term	Definition
Patient	Refers to the Member, Consumer, or Recipient. The Patient is the person receiving services.
Caregiver	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.
Provider	Refers to the Agency or organization coordinating services.
Payer	Refers to the Managed Care Organization (MCO), Contract, or HHS. The Payer is the organization placing Patients with Providers.
HHAX	Acronym for HHAExchange

Worklist Example

The following example demonstrates the task of managing expiring Medicals/Evaluations for a Caregiver, reviewing how a worklist task is created and resolved. For this particular worklist, the system is configured to create a new task whenever a Medical or Evaluation comes within 30 days of expiring. Navigate to **Action > Ops Worklist** to access the worklists.

The following details are provided in the task:

- Caregiver Name
- Name of the Medical or Evaluation that is expiring for the Caregiver
- Expiration Date of the Medical or Evaluation
- User assigned to the task (assignee)
- Task Status

From the task, the assignee has the option to message the Caregiver via ConeXus to inform them of the expiring Medical/Evaluation. Notes can also be added to the task to track when the Caregiver was contacted or any other pertinent information. The Task Status can also be updated to indicate that it is In Progress. Once the completed Medical/Evaluation information is provided by the Caregiver, and entered in the system, the application automatically updates the Task Status to Completed (as the closing condition is met).

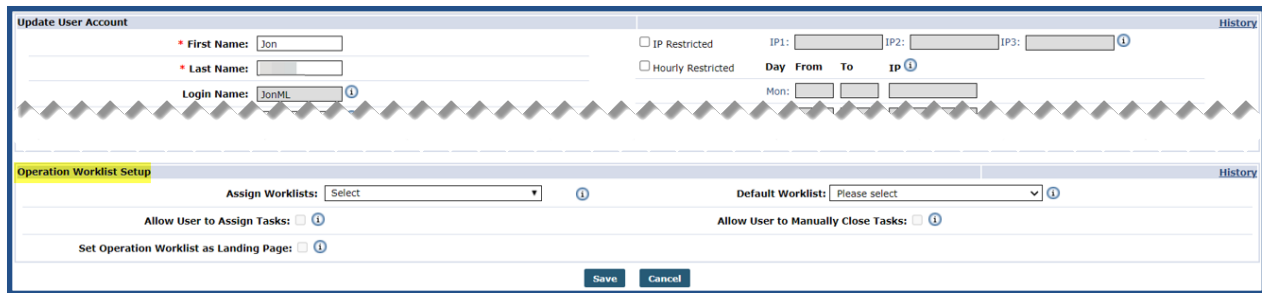
Medical/Compliance	Expiration Date	Reported Date	Caregiver	Notes	Assigned To	Worklist Status	Actions
Annual Health Assessment	11/22/2020	11/06/2020	Paul Allen ID: 12345678	11/11/2020 4:25 PM by John Doe (jdoe) Lorem ipsum dolor sit amet, consectetur adipiscing elit.	John Doe	Due	...
Chest X-Ray	11/22/2020	11/06/2020	Paul Allen ID: 12345678	11/11/2020 4:25 PM by John Doe (jdoe) Lorem ipsum dolor sit amet, consectetur adipiscing elit.	John Doe	Completed	...
Flu Vaccine	11/22/2020	11/06/2020	Paul Allen ID: 12345678	11/11/2020 4:25 PM by John Doe (jdoe) Lorem ipsum dolor sit amet, consectetur adipiscing elit.	John Doe	Closed	...

Medicals/Other Compliance Renewals Worklist

All worklists are housed in a single page, allowing an assignee to tab through and manage the worklists/tasks assigned to them (worklist assignment is performed at the user level). Worklists can be sorted and searched for using the Search filter fields (criteria) such as **Caregiver, Patient, Task Status, Assignee, and Office**.

User Setup

Access and permissions to Ops Worklists are managed at a user level in the *User Account* page (**Admin > User Management > User Search > Update User Account**). In the *User Account* page, scroll to the *Operations Worklist Setup* section (as seen in the following image) and select from the options, as described in the table below the image.



User Account Page: Operation Worklist Setup

Field	Description
Assign Worklists	Select the applicable worklist(s) from this dropdown field to assign the user to one or more worklists. When assigned to a worklist, the user can access the <i>Operation Worklist</i> page and be assigned to worklist tasks.
Default Worklist	Select a default worklist for the user; the worklist that opens by default when the user opens the <i>Operations Worklist</i> page.
Allow User to Assign Tasks	Select this checkbox to allow the user to assign worklist tasks to other users. Note: A user can self-assign tasks even if this permission is not granted to them.
Allow User to Manually Close Tasks	Select this checkbox to allow the user to manually close worklist tasks at any time, bypassing the predefined conditions that automatically mark the Status as <i>Completed</i> .
Set Operation Worklist as Landing Page	Select this checkbox to prompt the system to automatically open the <i>Operation Worklist</i> page when the user logs in.

Worklist Task Management

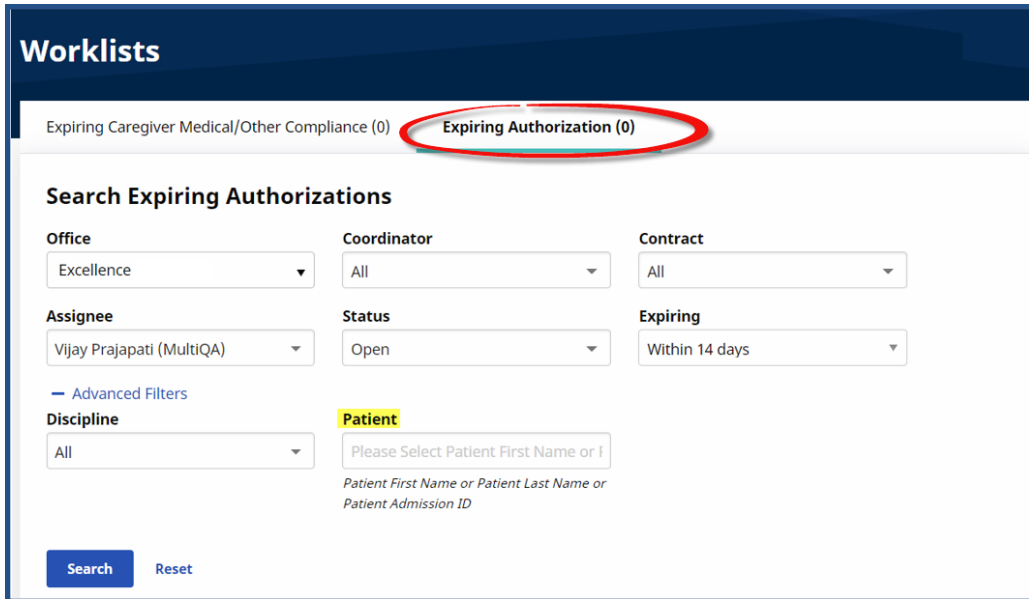
Worklists and associated tasks vary based on the information needed to successfully complete administrative or clerical duties. For example, the Missing Medicals Worklist tasks contain information on a Caregiver and their expiring Medical; whereas the Expiring Authorization Worklist tasks provide details regarding a Patient Authorization that is close to expiration.

Although worklists vary in the details provided, all worklist task management follows a common workflow with the following components:

- [Search Options](#)
- [Task Statuses](#)
- [Assigning Tasks](#)
- [Entering Notes](#)
- [Task Action Menu](#)

Search Options

Each worklist contains a number of search fields allowing users to sort through tasks. Most fields are associated with the functional area the worklist covers. For example, in the **Expiring Authorizations Worklist**, a **Patient** search field is available to search for tasks associated with a specific Patient, as illustrated in the following image.



Expiring Authorization Worklist: Search Fields

The following table provides other common Search fields (and descriptions) across all worklists.

Field	Description
Office	The Office field defaults to the user’s Primary Office. Select one or more Offices to search for tasks based on office. Note: Search results do not reflect tasks for Offices which a user is not assigned to.
Assignee	Select one or more Assignees to search for tasks based on the user assigned to them. This field defaults to the user accessing the worklist.
Status	Select one or more Status options to search tasks based on status.

Task Action Menu

For each worklist task, a number of actions can be performed via the **Actions** menu, as illustrated in the following image and described in the table below.



Actions Menu

Click on the **Bulk Actions** button to apply the above actions to multiple tasks at a time.

Action	Description
Refresh Status	Select to prompt the application to check if the Task Status has changed since initiating a search.
Update Status to Open	Select to change the task status to <u>Open</u> .
Update Status to In-Progress	Select to change the task status to <u>In Progress</u> .
Update Status to Closed	Select to change the Task Status to <u>Closed</u> . Note: This action is permission-based (refer to the User Setup section).
View/Add Notes	Select to open the <i>View/Add Notes</i> window to enter a new note or view all notes associated with the task.
Assign Task	Select to assign the task to self or other users. Note: The option to assign tasks to other users is permission controlled (see the User Setup section).

Task Status

All worklist tasks follow a standard set of status levels to track the progress of the task (from initiation to completion) as defined in the following table.

Status	Description
Open	Indicates that a task is new and needs assignment to a user. All tasks begin with an <u>Open</u> Status.
In Progress	The task moves to an <u>In Progress</u> status once assigned to an Assignee and is actively worked on. Note: <i>Not an automated update; the Status must be updated manually by the Assignee.</i>
Completed	A task is automatically marked as <u>Completed</u> if a specific system condition is met, indicating that the task has been resolved. The condition for moving a task to <u>Completed</u> varies by worklist. Refer to a particular worklist for more information on completion conditions.
Closed	Users can manually set a task to <u>Closed</u> if a task cannot be completed or resolved; the <u>Closed</u> status is not based on meeting a specific condition. A note is required when moving a task to <u>Closed</u> .

Refer to the [Task Action Menu](#) section for information on changing a task status.

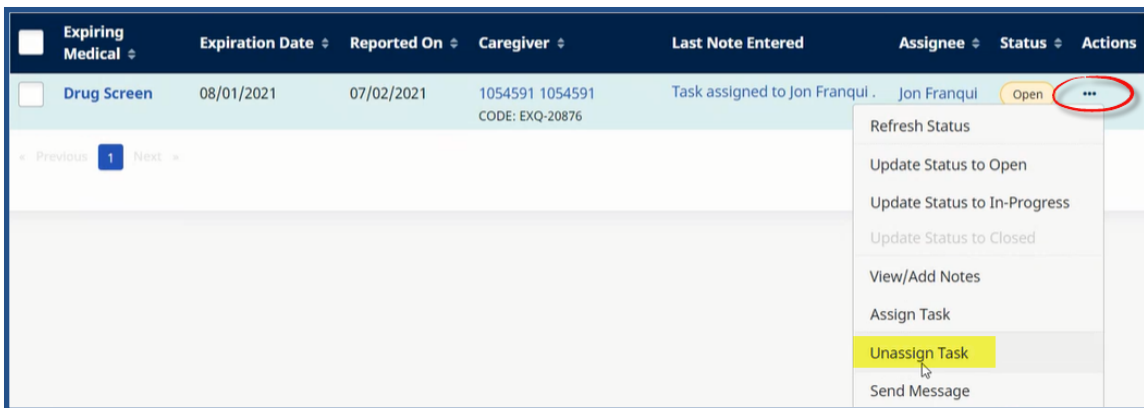
Assigning Tasks

A user can assign themselves worklist tasks that they are managing. In addition, if the user has the **Allow User to Assign Tasks** permission (mentioned in the [User Setup](#) section) they can assign another user to a task (whether the task is currently assigned to another user or does not have an Assignee). There is no restriction to the number of times the assignee can be changed.

Refer to the [Task Action Menu](#) section for information on assigning tasks.

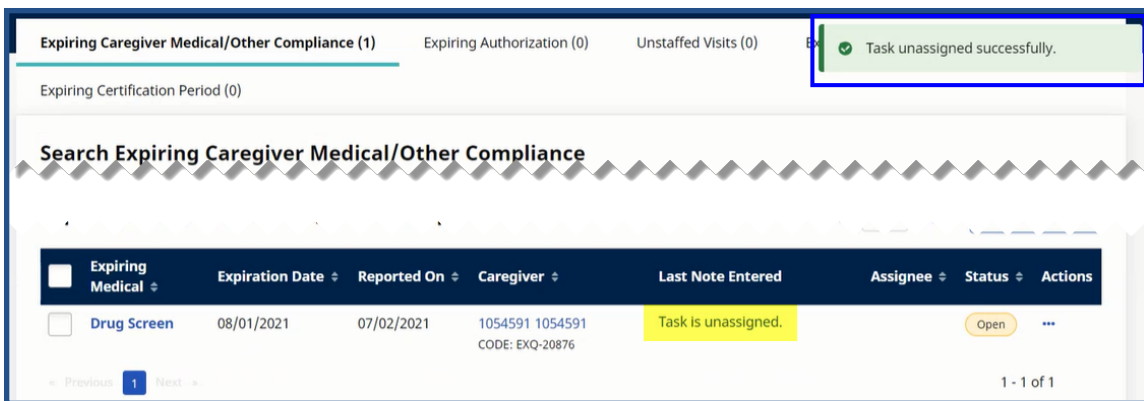
Unassign Task Enhancement

To better manage Worklists tasks, an **Unassign Task** feature has been added to the **Actions** menu, as seen in the following image.



Actions: Unassign Task

Once **Unassing Task** is selected for a task, all Assignees are removed from the task, allowing Providers to reassign to another assignee.

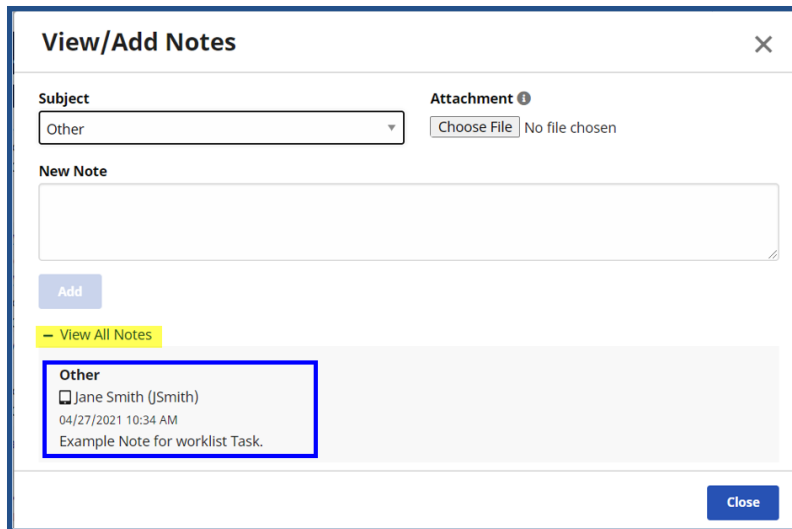


Task Unassigned

Entering Notes

Notes can be entered for a specific worklist task to log the steps taken to resolve the task. On the *View/Add Notes* window, select a **Subject** or attach supporting documentation under the **Attachment** field, as illustrated in the image below.

When adding a new note, note that all previously entered notes are available to review under the *View All Notes* section of the window (highlighted on the image).

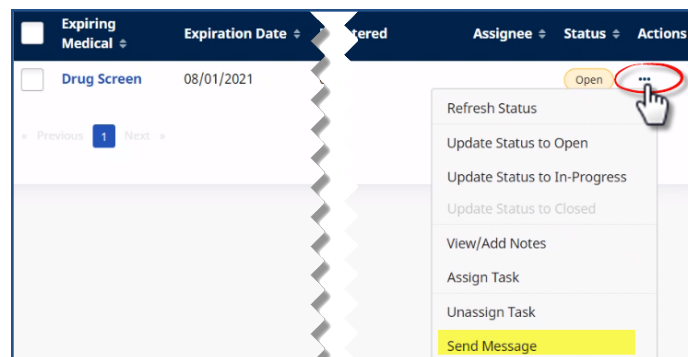


View/Add Notes Window

Note that the last entered note for a task is automatically displayed on the search results. Refer to the [Task Action Menu](#) section for information on entering and viewing task notes.

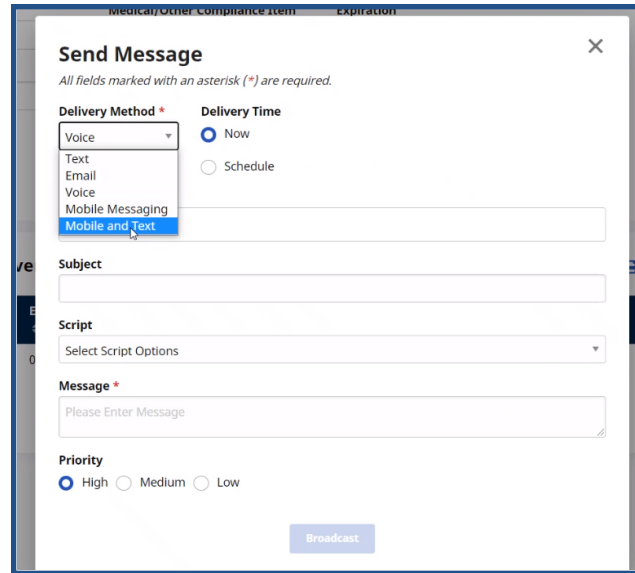
Send Messages from Actions Menu

The **Actions** menu has been expanded to allow Providers to send messages directly from the worklist. Click on the **Actions** ellipsis from the selected search result, followed by **Send Message**, as seen in the image below.



Actions: Send Message

The *Send Message* window opens. Select the **Delivery Method** and enter the **Message** (required, as denoted by the red asterisk). Once complete, click on the **Broadcast** button to send the message.



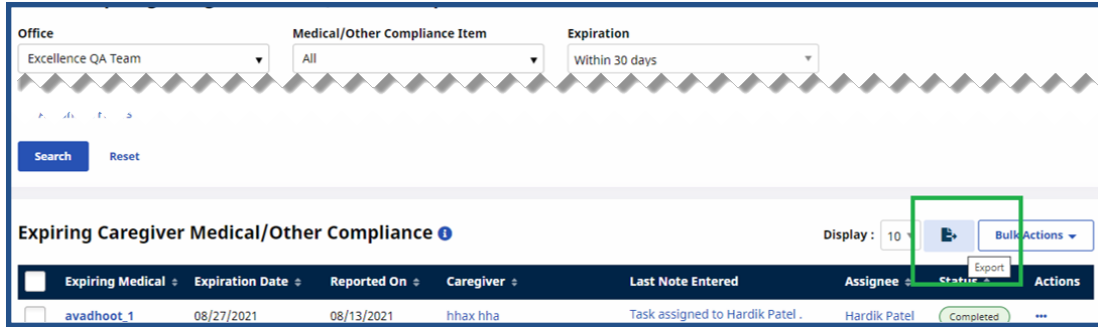
The screenshot shows a 'Send Message' dialog box with the following fields and options:

- Delivery Method ***: A dropdown menu with options: Voice, Text, Email, Voice, Mobile Messaging, and Mobile and Text (highlighted).
- Delivery Time**: Radio buttons for 'Now' (selected) and 'Schedule'.
- Subject**: A text input field.
- Script**: A dropdown menu with 'Select Script Options'.
- Message ***: A large text area with the placeholder 'Please Enter Message'.
- Priority**: Radio buttons for 'High' (selected), 'Medium', and 'Low'.
- Broadcast**: A button at the bottom right.

Send Message Window

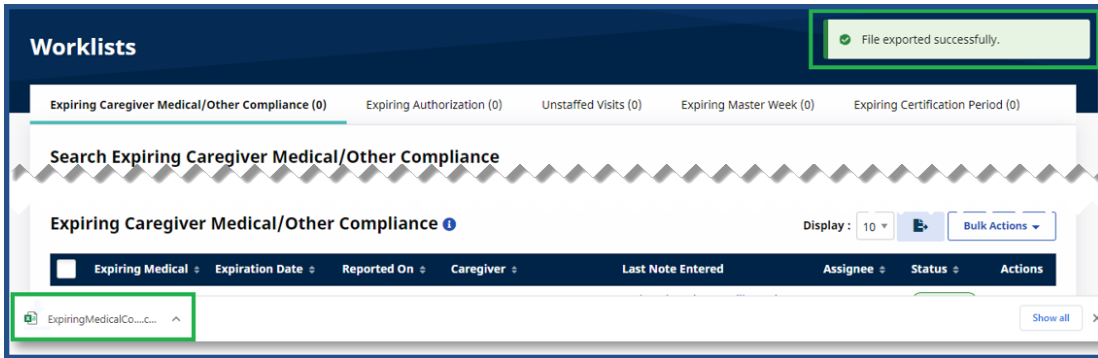
Exporting Search Results

All Ops Worklists have the option to export search results. Click on the **Export** icon (located at the top-right of the search results) to download the search results as a CSV file, as seen in the image below.



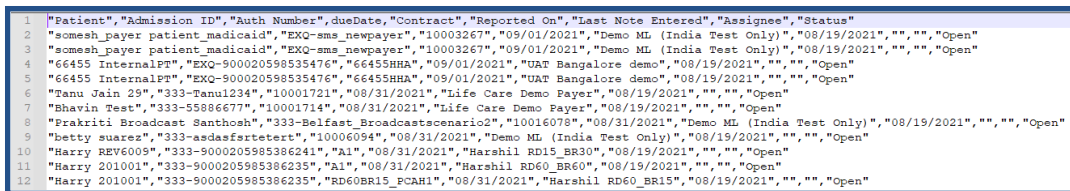
Operation Worklist: Export Icon

The system alerts of a successful export and the file appears on the bottom-left corner, as seen in the following image.



Successful Export

Click on the file to view the CSV export.

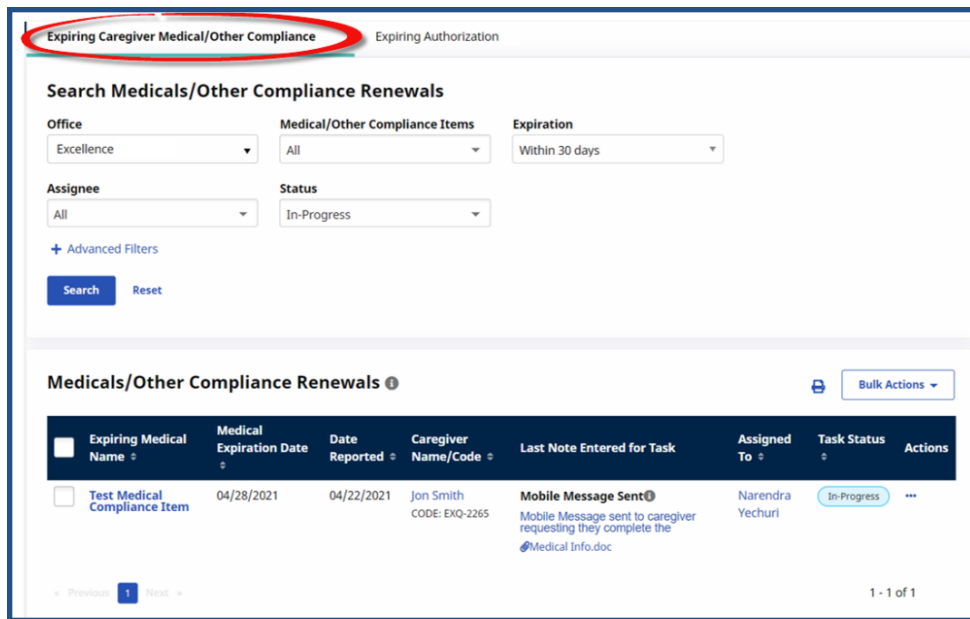


Exported CSV File

Expiring Medicals/Other Compliance Worklist

Tip: You can press **Ctrl-F** on your keyboard to search this topic.

Tasks for the **Expiring Caregiver Medical/Other Compliance Worklist** are created when a specific Medical or Other Compliance record comes within 30 days of expiration without a set **Completion Date** and **Result** value. Tasks within this worklist are only *Completed* if values for the **Completion Date** and **Result** fields are entered or the **Due Date** is changed to a later date (no longer reflecting a 30-day expiration).



Expiring Caregiver Medical/Other Compliance Worklist

Worklist Search Filters

The top section of the worklist contains search filters, as seen in the image above and described in the following table. Select the search criteria to view associated tasks.

Field	Description
Office	The Office field defaults to the user’s Primary Office. Select one or more Offices to search for tasks based on office. Note: Search results do not reflect tasks for Offices which a user is not assigned to.
Medical/Other Compliance Item	Select the Medical/Other Compliance Item to search. <i>All</i> is selected by default.
Expiration	Select an expiration time frame to sort worklist tasks based on the Med-

Field	Description
	ical Expiration Date. <i>Within 30 days</i> is selected by default.
Assignee	Select to sort tasks based on the assigned user. By default, this field is set to the user accessing the worklist.
Status	Select a status(es) to search based on status.
Advanced Search Filters	
Caregiver	Select a Caregiver to search for worklist tasks associated with a specific Caregiver.
Team/Branch/Location	Use these search filters to search for a Caregiver's specific Team , assigned Branch(es) or Location(s) .
Discipline	Select applicable Discipline(s) to search for worklist tasks based on the Caregiver's assigned discipline(s). <i>All</i> is selected by default.
Caregiver Status	Use to search for expiring Caregiver Medicals/Other Compliance items based on Caregiver status (<i>All, Active, Inactive, Hold, On Leave, and Terminated</i>).
Language	Use to search for expiring Caregiver Medicals/Other Compliance tasks based on the Caregiver's selected language.

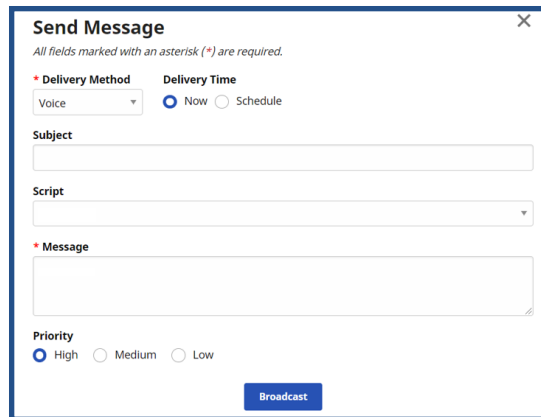
Worklist Details Provided

The following table provides the details included for on the worklist widget.

Field	Description
Caregiver Name/Code	The Caregiver Name and Code. Click on the Caregiver Name (hyperlink) to access the Caregiver Profile.
Expiring Medical Name	Title/Name of the expiring Medical.
Medical Expiration Date	The date the Medical expires in the system.
Date Reported	The date when the worklist is created by the system.
Last Note Entered for Task	Displays the last note entered for the task. If at least one note is entered, then a Note icon appears in this column. As quick reference, hover over the icon to display the last note entered.
Assigned To	The name of the current Assignee for the task (if any).
Task Status	The current status of the task.

Additional Task Actions

Send Message is an additional Task Action for the **Expiring Caregiver Medical/Other Compliance Worklist**, allowing a user to send messages directly to the associated Caregiver from the worklist page.



Send Message ✕

All fields marked with an asterisk (*) are required.

*** Delivery Method** **Delivery Time**

Voice Now Schedule

Subject

Script

*** Message**

Priority

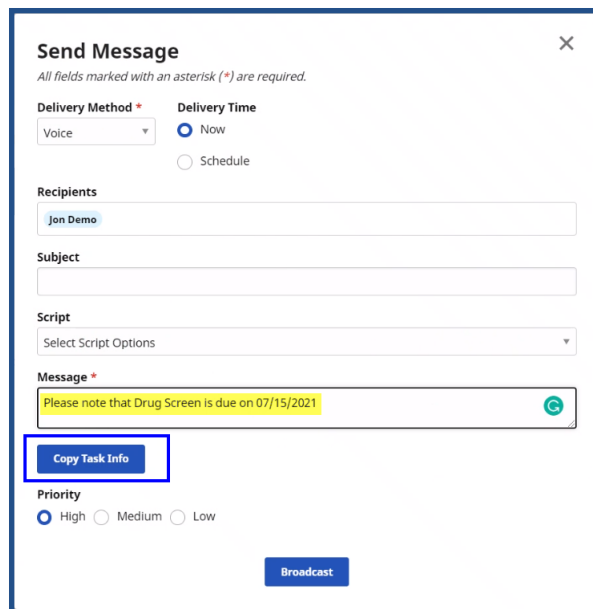
High Medium Low

Broadcast

Task Action: Send Message

Send Message: Copy Task Info Button

To ease entering repetitive messages, use the **Copy Task Info** button when sending a message to a specific Caregiver, as seen in the following image. Click on the **Copy Task Info** button to copy the details of the selected task into the message. Messages can be customized accordingly, if/as needed.



Send Message ✕

All fields marked with an asterisk (*) are required.

Delivery Method * **Delivery Time**

Voice Now Schedule

Recipients

Jon Demo

Subject

Script

Select Script Options

Message *

Please note that Drug Screen is due on 07/15/2021 C

Copy Task Info

Priority

High Medium Low

Broadcast

Send Message: Copy Task Info

This feature can also be used to send Bulk message. Click on the **Copy Task Info** button to copy the details of the selected task into the message and send to the listed Recipients (Caregivers), as seen in the image below. Messages can be customized accordingly, if/as needed.

Send Message: Copy Task Info

Deleted Compliance Items Marked Completed in Worklist

When a Compliance Item is deleted from the *Caregiver Compliance Medical/Other Requirements* page, the respective task is marked Completed in the *Expiring Caregiver Medical/Other Compliance Worklist*.

Expiring Caregiver Medical/Other Compliance								Display :	10	Bulk Actions
<input type="checkbox"/> Expiring Medical	Expiration Date	Reported On	Caregiver	Last Note Entered	Assignee	Status	Actions			
<input type="checkbox"/> Drug Screen	07/15/2021	07/08/2021	Jon Demo CODE: QUE-1632			Open	...			
<input type="checkbox"/> PPD	07/12/2021	07/08/2021	Jon Demo CODE: QUE-1632			Completed	...			
<input type="checkbox"/> Flu Vaccine	07/10/2021	07/08/2021	Jon Demo CODE: QUE-1632			Open	...			
<input type="checkbox"/> PPD	06/23/2021	06/02/2021	Caregiver 1A CODE: MIA-1620	Status changed to Open.	Narendra Kumar	Completed	...			
<input type="checkbox"/> Flu Vaccine	06/20/2021	06/02/2021	Caregiver 1A CODE: MIA-1620	Voice Message sent.	Narendra Kumar	Completed	...			

Deleted Compliance Item: Completed Status

Automated Notes

On the *Expiring Caregiver Medical/Other Compliance Worklist*, an *Automated Note* is issued when a task status changes. For example, when a task is deleted, it is marked as Completed and a note appears under the **Last Note Entered** column, as seen in the image below.

<input type="checkbox"/>	Expiring Medical	Expiration Date	Reported On	Caregiver	Last Note Entered	Assignee	Status	Actions
<input type="checkbox"/>	Annual Skill Assessment	06/07/2021	05/08/2021	Testing3 Testing3 Testing3 CODE: HHA-30758	Email Message sent.	Rakesh W	Open	...
<input type="checkbox"/>	Annual Skill Assessment	06/07/2021	05/08/2021	Testing3 Testing3 Testing3 CODE: HHA-30758	Status changed to Open.		Open	...
<input type="checkbox"/>	Initial competency	05/12/2021	05/10/2021	Test Caregiver 12 18 2020 CODE: HHA-31561			Open	...
<input type="checkbox"/>	Flu Shot	06/22/2021	06/21/2021	Rutvik hha Soni CODE: HHA-32378	Email Message sent.		Open	...
<input type="checkbox"/>	Drug Screen	08/12/2021	07/13/2021	QAUpdate QA400 A CODE: EXQ-31083	Medicals/Other Compliance record deleted		Completed	...

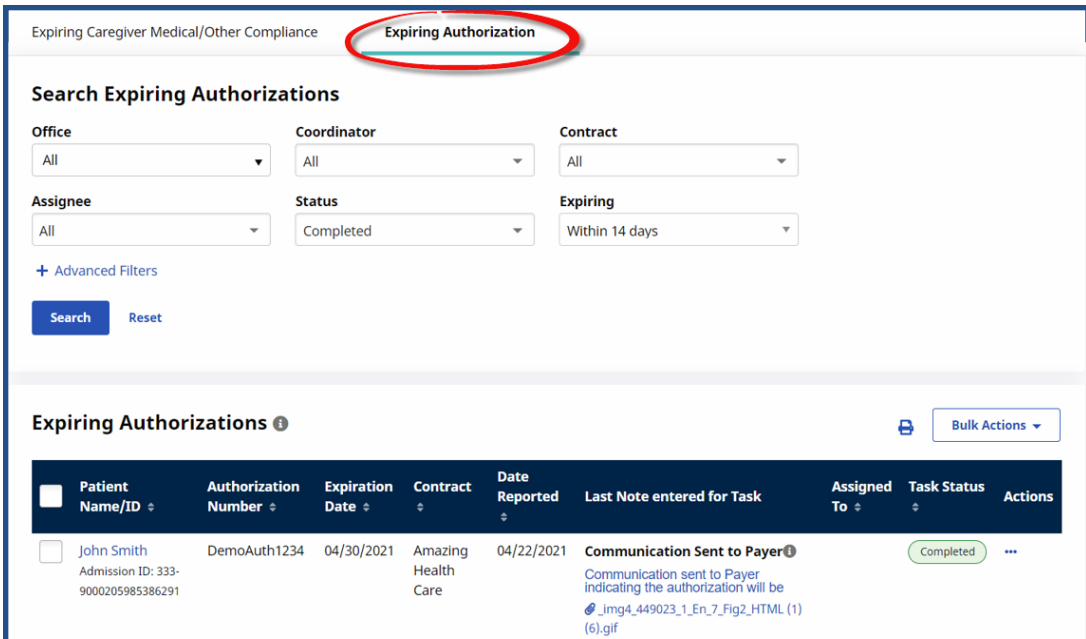
Expiring Caregiver Medical/Other Compliance Worklist: Automated Note

Expiring Authorizations Worklist

Tasks for the **Expiring Authorization Worklist** are created when an Authorization is within 14 days of the expiration date. Tasks within this worklist are Completed if a new Authorization for the associated contract is available for the Patient or the existing authorization is extended appropriately.

If an Authorization for the same Contract is added, changed, or deleted, then an existing task is marked Completed. Automated notes for any of the closing conditions are logged, for example:

- If a new authorization is **added**, then the associated task is marked as Completed and the note reads: **New authorization entered for Patient.**
- If an authorization is **deleted**, then the task is automatically marked as Completed and the note reads: **This authorization has been deleted.**
- If an authorization is **edited** and the ending date is no longer within 30 days, then the task is marked as Completed and the note reads: **Authorization date range extended.**



Expiring Caregiver Medical/Other Compliance **Expiring Authorization**

Search Expiring Authorizations

Office: All | Coordinator: All | Contract: All

Assignee: All | Status: Completed | Expiring: Within 14 days

+ Advanced Filters

Search Reset

Expiring Authorizations 🔍 Bulk Actions

<input type="checkbox"/>	Patient Name/ID	Authorization Number	Expiration Date	Contract	Date Reported	Last Note entered for Task	Assigned To	Task Status	Actions
<input type="checkbox"/>	John Smith Admission ID: 333-9000205985386291	DemoAuth1234	04/30/2021	Amazing Health Care	04/22/2021	Communication Sent to Payer Communication sent to Payer indicating the authorization will be _img4_449023_1_En_7_Fig2_HTML (1) (6).gif		Completed	⋮

Expiring Authorization Worklist

Worklist Search Filters

The search filters for this worklist are described in the following table. Select the search criteria to view associated tasks.

Field	Description
Office	The Office field defaults to the user's Primary Office. Select one or more Offices to search for tasks based on office. <i>Note: Search results do not reflect tasks for Offices which a User is not assigned to.</i>
Coordinator	Select by Coordinator to search for tasks in this worklist assigned to other Coordinators. The Coordinator associated with the user is selected by default.
Contract	Select to search for tasks associated with specific Contracts. By default, <i>all</i> Contracts assigned to the user's Office are selected.
Assignee	Select to sort tasks based on the assigned user. By default, this field is set to the user accessing the worklist.
Status	Select a status(es) to search based on status.
Expiring	Select an expiration time frame to search worklist tasks based on the Authorization expiration date. <i>Within 30 days</i> is the default selection.
Advanced Search Filters	
Caregiver	Select a Caregiver to search for worklist tasks associated with a specific Caregiver.
Team/Branch/Location	Use these search filters to search for a Caregiver's specific Team , assigned Branch(es) or Location(s) .
Discipline	Select applicable Discipline(s) to search for worklist tasks based on based on the type of service associated with the Authorization.
Patient	Select a Patient(s) to search for worklist tasks associated with a specific Patient.
Patient Status	Select Patient Status (<i>All, Waiting, Active, Hospitalized, Discharged, or Hold</i>) to search by status.

Worklist Details Provided

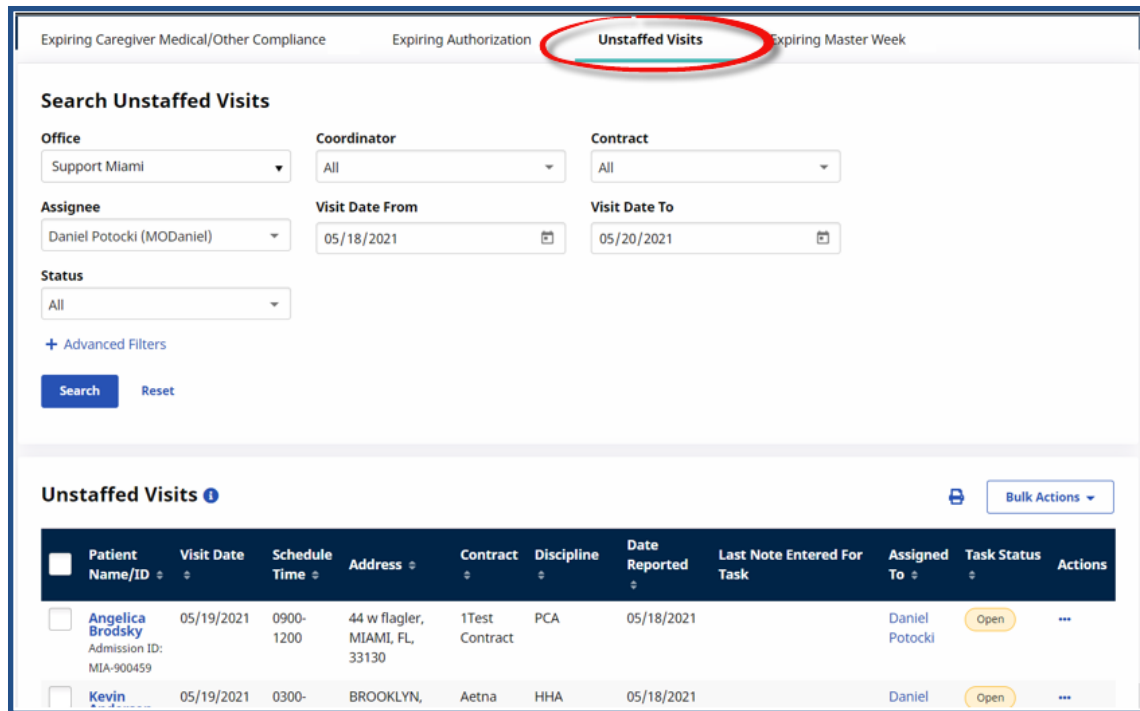
The following table provides the details included on the worklist widget.

Field	Description
Patient Name/ID	The Patient Name and ID. Click on the Patient Name (hyperlink) to access the Patient Profile.
Authorization Number	The number assigned to/associated with the expiring Authorization.
Expiration Date	The date the Authorization expires in the system.
Contract	The Contract (name) with the expiring Authorization.
Last Note Entered for Task	Displays the last note entered for the task. If at least one note is entered, then a Note icon appears in this column. As quick reference, hover the

Field	Description
	cursor over the icon to display the last note entered.
Assigned To	The name of the current Assignee for the task (if any).
Task Status	The current status of the task.

Unstaffed Visits Worklist

Tasks for the **Unstaffed Visits Worklist** are created when an unstaffed visit (a visit with a “TEMP” Care-giver assigned) is within three days of the scheduled date. Tasks within this worklist are only Completed when a Caregiver is assigned to the visit.



Operation Worklist: Unstaffed Visits

Worklist Search Filters

The search filters for this worklist are described in the following table. Select the search criteria to view associated tasks.

Field	Description
Office	The Office field defaults to the user’s Primary Office. Select one or more Offices to search for tasks based on office. Note: Search results do not reflect tasks for Offices which a User is not assigned to.
Coordinator	Select by Coordinator to search for tasks in this worklist assigned to other Coordinators. The Coordinator associated with the user is selected by default.
Contract	Select to search for tasks associated with specific Contracts. By default, <i>all</i> Contracts assigned to the user’s Office are selected.

Field	Description
Assignee	Select to sort tasks based on the assigned user. By default, this field is set to the user accessing the worklist.
Visit From/To Date	Select a visit date range.
Status	Select a status(es) to search based on status.
Advanced Search Filters	
Team/Branch/Location	Use these search filters to search for a Caregiver's specific Team , assigned Branch(es) or Location(s) .
Discipline	Select applicable Discipline(s) to search for worklist tasks based on based on the type of service associated with the Authorization.
Patient	Select a Patient(s) to search for worklist tasks associated with a specific Patient.
Patient Status	Select Patient Status (<i>All, Waiting, Active, Hospitalized, Discharged, or Hold</i>) to search by status.

Worklist Details Provided

The following table provides the details included on the worklist widget.

Field	Description
Patient Name/ID	The Patient Name and ID. Click on the Patient Name (hyperlink) to access the Patient Profile.
Visit Date	The date of the scheduled visit.
Schedule Time	The start and end times for the visit
Address	The Patient's Primary address.
Contract	The Contract (name) associated with the visit.
Discipline	The type of service (Discipline) required for the visit.
Date Reported	The date the task was created.
Last Note Entered for Task	Displays the last note entered for the task. If at least one note is entered, then a Note icon appears in this column. As quick reference, hover the cursor over the icon to display the last note entered.
Assigned To	The name of the current Assignee for the task (if any).
Task Status	The current status of the task.

Automated Notes

Automated Notes apply to the **Unstaffed Visits** worklist, ensuring there is a note detailing why a particular task has been set to Completed, as seen in the following image.

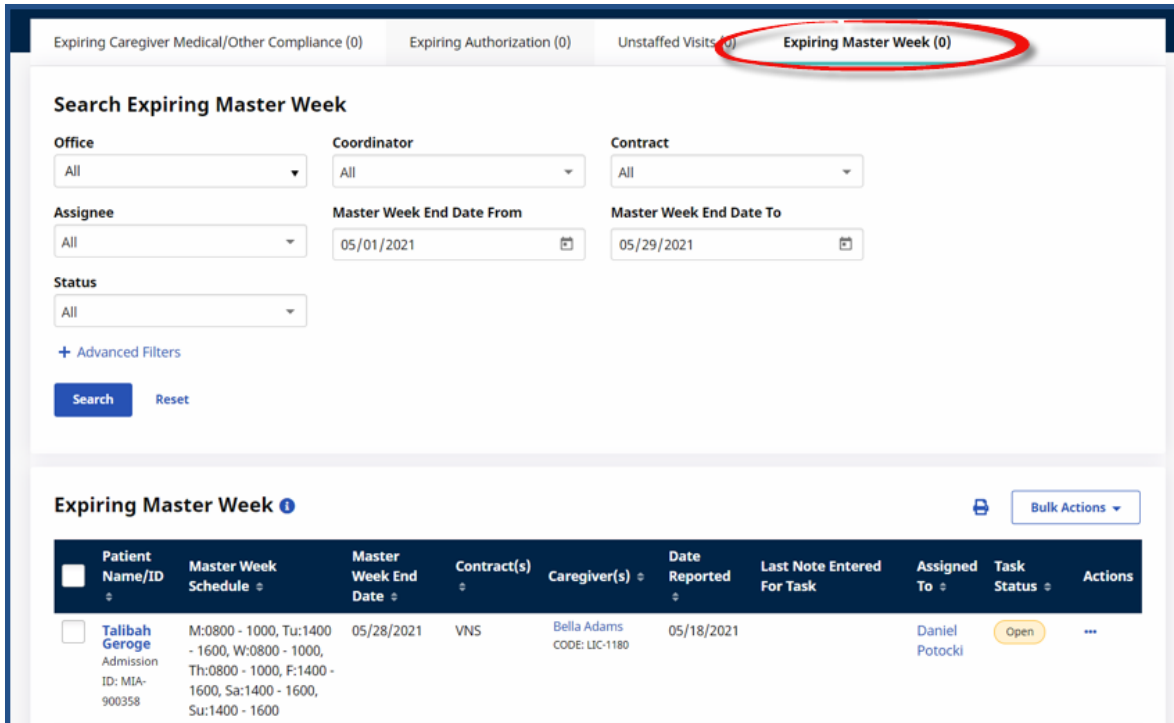


Patient	Visit Date	Schedule Time	Address	Contract	Discipline	Reported On	Last Note Entered	Assignee	Status	Actions
order2 order2 Admission ID: EQ2 90020196385411	03/27/2022	1000-1100	NEW YORK, NY, 10101	USA-Care	HHA	03/25/2022	This visit has been staffed.		Completed	
01 01Admission ID: EQ2 90020196384835	03/27/2022	0100-0300	SCHENECTADY, NY, 12345	NationalInsurance	HHA	03/25/2022	This visit has been marked as missed.		Completed	
order2 order2	03/26/2022	1000-1100	NEW YORK, NY, 10101	USA-Care	HHA	03/25/2022			Open	

Unstaffed Visits Ops Worklist: Reason Notes

Expiring Master Week Worklist

Tasks for the **Expiring Master Week Worklist** are created when a Master Week schedule is within 5 days of the set end date. Tasks within this worklist are only *Completed* when the existing Master Week schedule is extended or a new Master Week is entered for the Patient.



Operation Worklist: Expiring Master Week

Worklist Search Filters

The search filters for this worklist are described in the following table. Select the search criteria to view associated tasks.

Field	Description
Office	The Office field defaults to the user’s Primary Office. Select one or more Offices to search for tasks based on office. Note: Search results do not reflect tasks for Offices which a User is not assigned to.
Coordinator	Select by Coordinator to search for tasks in this worklist assigned to other Coordinators. The Coordinator associated with the user is selected by default.
Contract	Select to search for tasks associated with specific Contracts. By default, all Contracts assigned to the user’s Office are selected.

Field	Description
Assignee	Select to sort tasks based on the assigned user. By default, this field is set to the user accessing the worklist.
Master Week End Date From/To	Select a visit date range.
Status	Select a status(es) to search based on status.
Advanced Search Filters	
Discipline	Select applicable Discipline(s) to search for worklist tasks based on based on the type of service associated with the Authorization.
Patient	Select a Patient(s) to search for worklist tasks associated with a specific Patient.
Patient Status	Select Patient Status (<i>All, Waiting, Active, Hospitalized, Discharged, or Hold</i>) to search by status.

Worklist Details Provided

The following table provides the details included on the worklist widget.

Field	Description
Patient Name/ID	The Patient Name and ID. Click on the Patient Name (hyperlink) to access the Patient Profile.
Master Week Schedule	The daily schedule associated with the Master Week schedule.
Master Week End Date	The last day of the Master Week schedule.
Address	The Patient's Primary address.
Contract	The Contract (name) associated with the Master Week schedule.
Caregiver	The Caregiver(s) associated with the Master Week schedule.
Date Reported	The date the task was created.
Last Note Entered for Task	Displays the last note entered for the task. If at least one note is entered, then a Note icon appears in this column. As quick reference, hover the cursor over the icon to display the last note entered.
Assigned To	The name of the current Assignee for the task (if any).
Task Status	The current status of the task.

Automated Notes

Automated Notes are issued for all tasks marked with a *Completed* status for the **Expiring Master Week** Ops Worklists. These Automated Notes provide the reason why a task is marked Completed, as illustrated in the following image.



Expiring Master Week										
Display: 10 Bulk Actions										
<input type="checkbox"/>	Patient	Master Week	End Date	Contract(s)	Caregiver(s)	Reported On	Last Note Entered	Assignee	Status	Actions
<input type="checkbox"/>	RLPO 013 Admission ID: EKQ MNB6556465	Sa:0100 - 0200	02/02/2022	Demo ML (India Test Only)		01/14/2022			Open	...
<input type="checkbox"/>	RLPO 013 Admission ID: EKQ MNB6556465	Sa:0100 - 0200	01/31/2022	Demo ML (India Test Only)		01/13/2022	New Master Week schedule entered.		Completed	...
<input type="checkbox"/>	RLPO 011 Admission ID: 500	Sa:0100 - 0200	01/30/2022	Demo ML (India Test Only)		01/14/2022	New Master Week schedule entered.		Completed	...

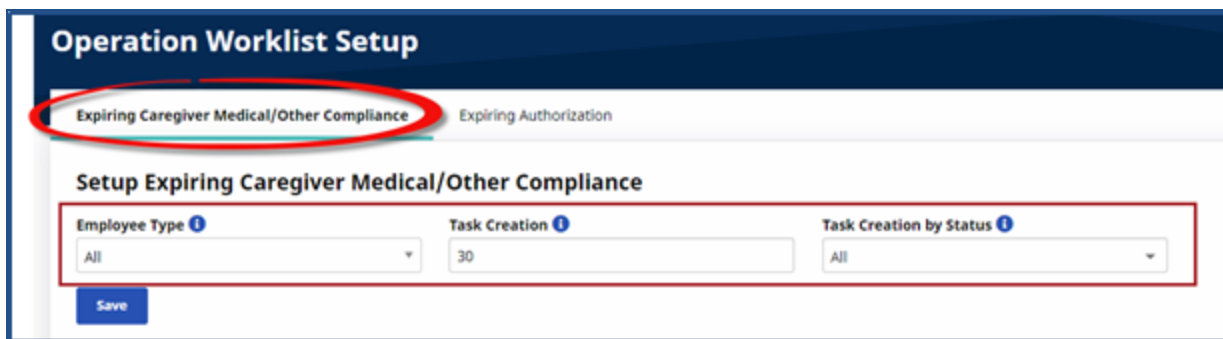
Automated Notes: Task Completed

Operation Worklist Setup

The **Operations Worklist Setup** feature (*Admin > Operation Worklist Setup*) allows Providers to define when Worklist Tasks are created and options to automate assignment of the tasks. Each Operation Worklist has its own setup. Refer to each section herein for further details on a particular worklist.

Expiring Caregiver Medical/Other Compliance Worklist

In the *Expiring Caregiver Medical/Other Compliance* tab, use the three available fields (**Employee Type**, **Task Creation**, and **Task Creation by Status**) to create and define task assignments, as seen in the following image and described in the table underneath.

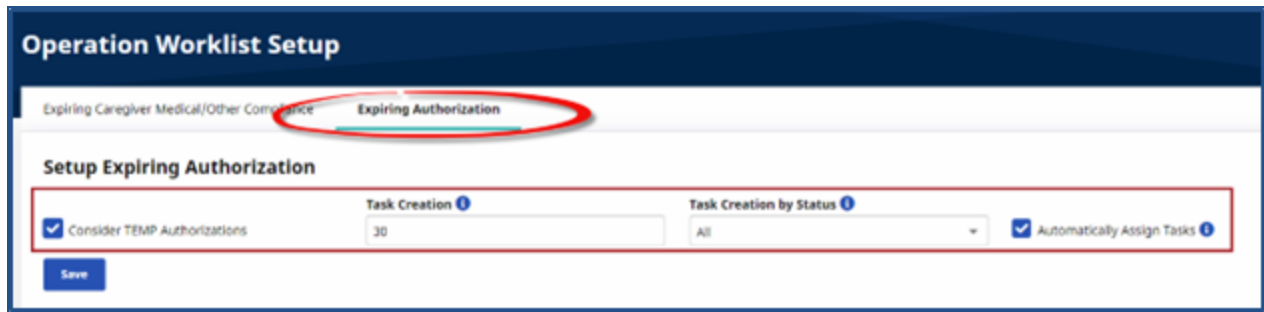


Operation Worklist Setup: Expiring Caregiver Medical/Other Compliance

Field	Description
Employee Type	Select <i>All</i> , <i>Applicant</i> , or <i>Employee</i> . Default setting is <i>All</i> .
Task Creation	This field defines how far in advance tasks for this worklist are created. For example, if 30 is entered, then tasks are created 30 days prior to the expiration of a Caregiver Medical or Other Compliance Item. Default setting is 30.
Task Creation by Status	Select <i>All</i> , <i>Active</i> , <i>Inactive</i> , <i>Hold</i> , <i>On Leave</i> , or <i>Terminated</i> . This field determines how tasks are created based on the Caregiver Status. Default setting is <i>Active</i> .

Expiring Authorization Worklist

In the *Expiring Authorizations* tab, use the four available fields (**Consider TEMP Authorizations**, **Task Creation**, **Task Creation by Status**, and **Automatically Assign Tasks**) to create and define task assignments, as seen in the following image and described in the table underneath.

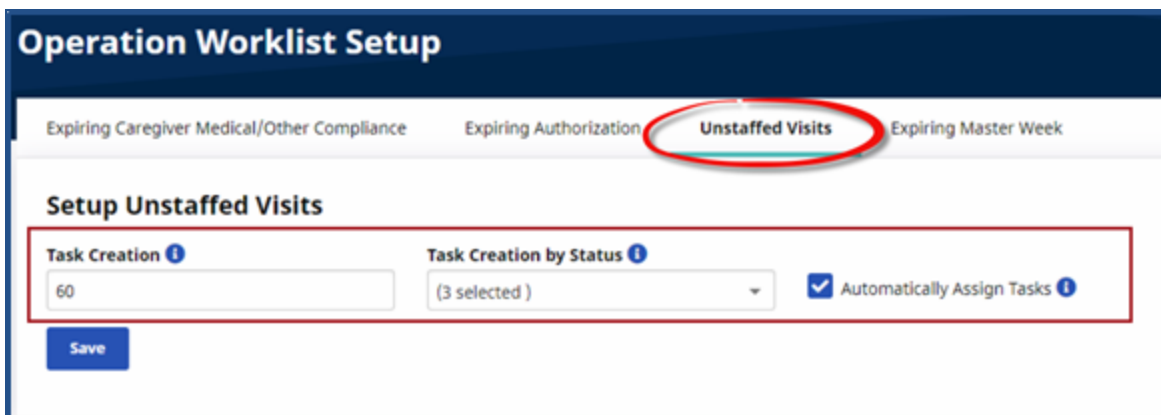


Operation Worklist Setup: Expiring Authorizations

Field	Description
Consider TEMP Authorization	Select checkbox to include TEMP Authorizations in the task creation.
Task Creation	This field defines how far in advance tasks for this worklist are created. For example, if 30 is entered, then tasks are created 30 days prior to the expiration of an Authorization. Default setting is 30.
Task Creation by Status	Select <i>All, Waiting, Active, Hospitalized, Discharged, or Hold</i> . This field determines how tasks are created based on the Patient Status. Default setting is <i>Active</i> .
Automatically Assign Task	Select checkbox to automatically assign the task to the Patient's Coordinator.

Unstaffed Visits

In the *Unstaffed Visits* tab, use the **Task Creation**, **Task Creation by Status**, and the **Automatically Assign Tasks** fields to create and define task assignments, as seen in the following image and described in the table underneath.

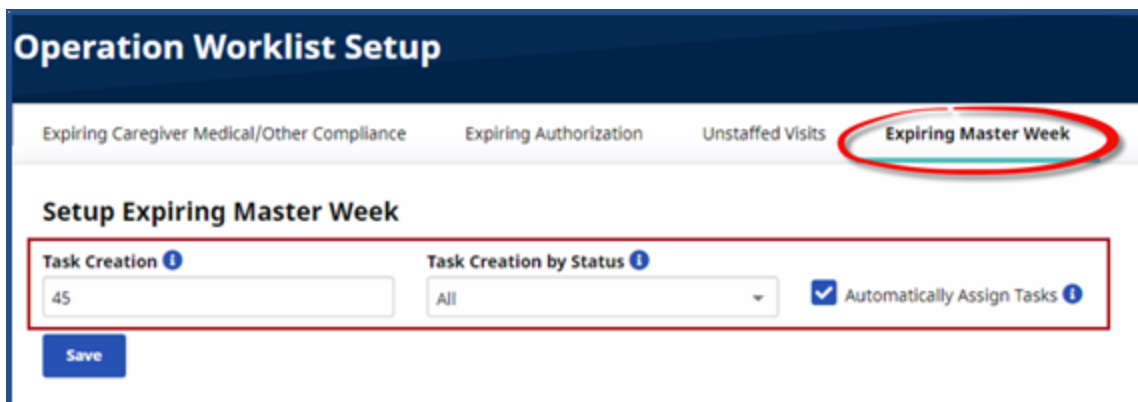


Operation Worklist Setup: Unstaffed Visits

Field	Description
Task Creation	This field defines how far in advance tasks for this worklist are created. For example, if 60 is entered, then tasks are created <u>60 days</u> prior to the expiration of Unstaffed Visits. Default setting is 30 .
Task Creation by Status	Select <i>All, Waiting, Active, Hospitalized, Discharged, or Hold</i> . This field determines how tasks are created based on the Patient Status. Default setting is <i>Active</i> .
Automatically Assign Tasks	Select checkbox to automatically assign the task to the Patient's Coordinator.

Expiring Master Week

In the *Expiring Master Week* tab, use the **Task Creation**, **Task Creation by Status**, and **Automatically Assign Tasks** fields to create and define task assignments, as seen in the following image and described in the table underneath.



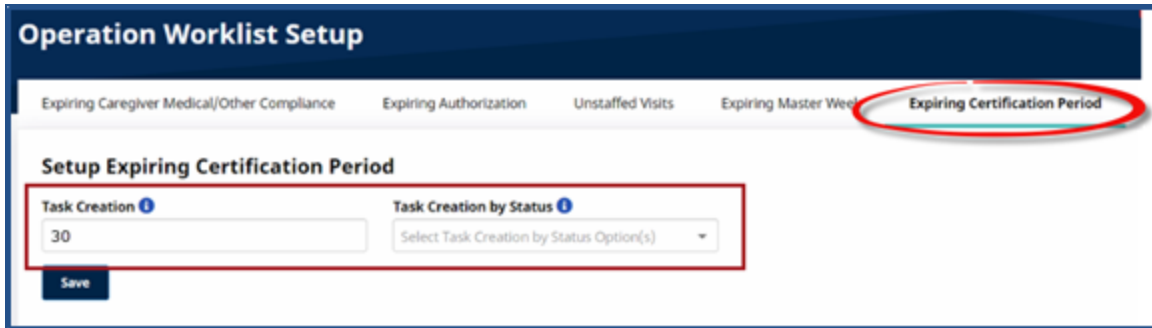
The screenshot shows the 'Operation Worklist Setup' interface with the 'Expiring Master Week' tab selected. The 'Setup Expiring Master Week' section contains three fields: 'Task Creation' (text input with value 45), 'Task Creation by Status' (dropdown menu with value All), and 'Automatically Assign Tasks' (checkbox checked). A red box highlights these three fields, and a red circle highlights the 'Expiring Master Week' tab label.

Operation Worklist Setup: Expiring Master Week

Field	Description
Task Creation	This field defines how far in advance tasks for this worklist are created. For example, if 30 is entered, then tasks are created <u>30 days</u> prior to the expiration of a Master Week. Default setting is 30 .
Task Creation by Status	Select <i>All, Waiting, Active, Hospitalized, Discharged, or Hold</i> . This field determines how tasks are created based on the Patient Status. Default setting is <i>Active</i> .
Automatically Assign Tasks	Select checkbox to automatically assign the task to the Patient's Coordinator.

Expiring Certification Period

In the *Expiring Certification Period* tab, use the **Task Creation**, **Task Creation by Status**, and **Automatically Assign Tasks** fields to create and define task assignments, as seen in the following image and described in the table underneath.



Operation Worklist Setup: Expiring Certification Period

Field	Description
Task Creation	This field defines how far in advance tasks for this worklist are created. For example, if 30 is entered, then tasks are created <i>30 days</i> prior to the expiration of a Certification Period. Default setting is 30.
Task Creation by Status	Select <i>All, Waiting, Active, Hospitalized, Discharged, or Hold</i> . This field determines how tasks are created based on the Patient Status. Default setting is <i>Active</i> .
Automatically Assign Tasks	Select checkbox to automatically assign the task to the Patient's Coordinator.