Front Desk - Use Workqueues

Access Your Workqueues

A workqueue is a list that collects items that requires some sort of follow up. These items are routed to the appropriate workqueue by using reliable system logic. There are different types of workqueues that gather together similar items to make follow up easier to complete.

1. To open your workqueue list, click .
2. Select the workqueue type you want to access.
   - Use the Understand Workqueue Types section of this guide to explore common workqueues for front desk staff.
3. Double click a workqueue's row to open it.
   - The top half of the workqueue is the list of items that require follow up.
   - The bottom half of the workqueue shows details of the item, including information about why the item is in the workqueue.
4. Select a row in the workqueue and preview the details about the item in the pane on the lower half of the screen.
   - This information helps you determine what actions you need to take to address the issues and remove the entry from your workqueue.
5. Use the information on the bottom half of the activity to complete the required follow up for the item you have selected.

Filter the workqueue list

1. From the Workqueue List, click **New Filter**.
2. Enter criteria to narrow the workqueues shown.
   - Tip: when searching for department- or specialty-owned workqueues, use the Name contains or ID field to search for your specific department or specialty.
3. Click **Apply** to use the filter.
4. To turn the filter off, click **Remove**.

	Click **Save As** to save your filter to the toolbar for easy access.

Favorite a workqueue

If you have a workqueue you use frequently, you can favorite it to make it easier to find later.

1. From the Workqueue List, click to favorite a workqueue.
2. Click **Favs** in the activity toolbar to view only the workqueues you've favorited.

Clicking ★ **Favs** shows you only the workqueues you've favorited for the currently selected workqueue type. For example, if you click ★**Favs** while you're on the **Patient** tab, you'll see only the patient workqueues you've favorited.

Understand Workqueue Types

The scope and naming conventions of workqueues can vary by organization. Check with a super user if you have questions about the workqueues used in your department, clinic, or hospital.

Understand Patient workqueues

A Patient workqueue is a list of encounters that are missing key registration information required for billing or patient care.

- Each row in a Patient workqueue is an encounter.
    - The encounter can be inpatient or outpatient, past or future.
    - Double click the row to open registration for the encounter.
- Examples of follow ups on a Patient workqueue:
    - Completing missing registration, like coverages for the encounter
    - Recording missing authorization information for the encounter
    - Recording missing certification information for an admission

Understand Appointment Request workqueues

An Appointment Request workqueue is a list of appointment requests that need to be scheduled or require follow up.

- Each row in an Appointment Request workqueue is an appointment request.
    - An appointment request is like a ticket with information to schedule.
    - Double click the row to open Book It to schedule the appointment request.
    - Some appointment request workqueues will keep the completed appointment request if there is any other follow up to complete for the request.
- Examples of follow ups on an Appointment Request workqueue:
    - Scheduling an appointment request for a patient's specialty consult

Understand Referral/Authorizations workqueues

Referral/Authorization workqueues contain authorization records that are missing authorization information or require other action.

- Each row in an Appointment Request workqueue is an authorization record.
    - An appointment request is like a ticket with information to schedule.
    - Double click the row to open and edit the authorization record.
- Examples of follow ups on a Referral/Authorizations workqueue:
    - Documenting a missing authorization decision
    - Responding to payer requests for additional information

- Some specialties use referral/authorization workqueues to schedule recurring appointments for a patient.

Access Other Activities from Your Workqueue

To review and edit patient, encounter, or record information while working in your workqueue, use the activity toolbar to jump into other activities. The available activities vary based on the workqueue or activity you're in. For example:

- Within a Patient workqueue, click **Registration** to access encounter-level registration or **Benefit Collection** to edit the encounter's payment details. Click **Auth/Cert** to open authorization and certification.
- Within a Referral/Authorization workqueue, click **Edit** to jump to the selected referral record or **Assign** to schedule or link it to an existing appointment.
- Within an Appointment Request workqueue, click **Appt Desk** to jump to the selected patient's Appointment Desk.

Temporarily Remove an Item from a Workqueue

When there isn't yet enough information to process an encounter or record, defer it so that it's temporarily removed from your workqueue. After a specified amount of time passes, the deferred encounter or record returns to the workqueue.

1. Select the item you need to defer.
2. Click **Defer** on the activity toolbar.
3. Enter a reason for deferral.
4. Enter the date and time at which the encounter or record should reappear on your workqueue.
5. Add a comment to indicate why you deferred the encounter or record.
6. If the deferral is transferable, select the **Preserve deferral if transferred** checkbox.
    - When you select the checkbox, the encounter appears on the **Deferred** tab of each workqueue that the encounter can be moved to.
7. Click **Defer** to close the window.
8. If you need to find the encounter before the deferral expires, go to the **Deferred** tab on your workqueue.