



Rep Tasks Overview

This chapter provides an overview of the Patient Reps Process activity.

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Overview

This section provides an overview of the Patient Reps Process activity.

What is the Patient Reps Process activity?

The Patient Rep Process activity allows the patient representative (*Rep*) to access a Worklist of patient visits to which he or she has been assigned to review.

A Rep works a visit on his or her Worklist by reviewing the visit, and then assigning a result to the review in a process called code review. Reps can also status (temporarily reassign) a visit to another Rep's Worklist.

You can access familiar action codes and activities from within the Patient Reps module in order to review a visit. Reps have access to many, if not all, of the same action codes that are available from the Patient Actions screen.

How is the Patient Reps Process activity beneficial?

By using the Patient Rep module in order to review patient visits, you can review visits directly from the Worklist and use Rep-specific action codes. This helps you manage the visits more effectively, and it ensures that the result of the review can be easily associated with the visit.

Key Terms to Know

You should understand the following key terms. For more information, refer to the page listed or to the Glossary.

Concepts	For more information, refer to:
The Worklist	page 18
Working Visits	page 21
Actions and Action Codes	page 22

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Concepts	For more information, refer to:
Code Review	page 22
Stated Visits	page 23
Future Visits	page 25
Triggers	page 21
Event-driven Reviews	page 21



Key Concepts to Understand

The following concepts are important in understanding the Patient Reps Process activity:

- The Worklist
- Triggers
- Working Visits
- Actions and Action Codes
- Code Review
- Statusing
- Future Visits

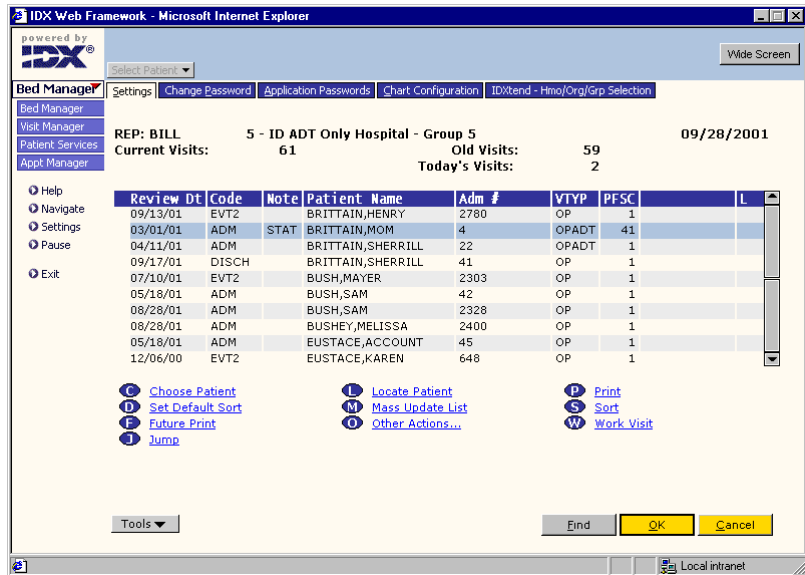
The Worklist

To begin working, you must access the Patient Rep Process activity in order to access your Worklist.

The *Worklist* contains all patient visits assigned to a Rep. The Worklist is the starting point for reviewing, or *working*, visits.

Your goal as a Patient Rep is to review each visit on your Worklist as you were trained to do at your enterprise. To accomplish this, you use the Patient Rep Process actions and action codes.

For information regarding accessing your Worklist, and the fields and actions on the Worklist screen, see [Chapter 2: Patient Rep Process Activity, which begins on page 29.](#)



How are visits assigned to the Worklist?

Visits are assigned to your Worklist either:

- By the system, due to a trigger
- By another Rep, due to stusing

How can a Rep determine why a visit appears on the Worklist?

On the Worklist screen, the Rep can look the Review Code in the Code column or the Rep Note in the Note column for an indication of why the visit is on his or her Worklist.

The Review Code tells the Rep which trigger or uncompleted event placed the visit on his or her Worklist, and therefore how the Rep should go about working the visit.

The Rep Note is STAT if the visit has been stusing by another Rep.

 Example

- A Rep could have a visit with the Review Code Pre, which means the visit has a status of preadmit. The status of preadmit triggered the visit to be placed on the Worklist. Reps would review this visit to verify that all of the preadmission information (for example, insurance or referrals) for the visit is present.
- Or, the visit could have a Review Code of Event1, which means that the visit has an Event hold bill on it because Event 1 is incomplete. The Rep would work the visit to ensure the Event 1 is complete, and then use action code

ME-Mark completed Event in order to mark the event complete.

How can I tell if a review is Event-driven?

If an Event hold bill appears in the Hold Bill selector screen, then you can work an incomplete Event. A code such as `Event 1` appearing in the `Code` column of your Worklist may indicate that there is an incomplete event associated with the visit.

Can visits exist on multiple Worklists?

A visit can exist on multiple Rep Worklists, with the following guidelines:

- A trigger-driven visit can only be owned by one Rep on his/her Worklist at a given time. Visits can exist on other Rep Worklists due to statusing, but this user is not the owner, and Rep reports will not include these users.
- Event-driven visits can go out to up to five different Rep Worklists that are set up to accept them. The visit can be on up to five different worklists for five different reasons (to encompass a visit's ability to have four incomplete Events and a trigger). If one Rep works the visit to remove the review from his or her Worklist, the four other reviews would remain on the other Worklists.
- Stated visits appear on both the Worklist of the Rep who stated the visit, and the Worklist of the Rep to whom the visit was stated. However, only the Rep to whom the visit was stated may select and work the visit until he or she code reviews the visit.

Can the same visit appear more than once on a single Rep's Worklist?

A visit will only ever appear once on a single Rep's Worklist.

What are some examples of a review that a Rep would perform from the Worklist?

Here are some examples of reviews that a Rep could perform from the Worklist:

- A Rep can be working preadmitted visits to insure that all of the preadmission information required for admission is present before the patient arrives.
- A Rep can also work Event hold bills, which means that the Rep must work the hold bill associated with an incomplete Event. The Rep ensures that the Event is complete in order to remove the hold bill from the visit.