



**CompuGroup™**  
Medical

# Work Queue Instructions

**CGMwebPRACTICE™**  
Fully Web-Based Practice Management Suite



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## INTRODUCTION

This document provides detailed instructions for the Practice Manager for adding, editing, and copying Work Queues for Users and for employees that have a Work Queue defined and how it facilitates their workflow in CGM webPRACTICE.

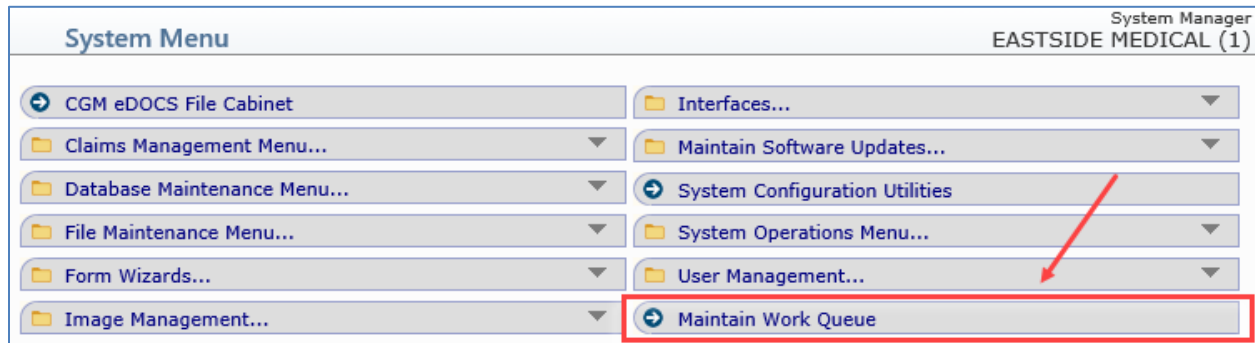
A Work Queue is a set of Table Codes that are assigned to a User Code to identify which codes the employee is responsible for 'working'. When a Work Queue has been created for a User, certain screens in CGM webPRACTICE are automatically filtered based on the User's Work Queue. This allows a User to focus only on the table codes assigned to them.

The following functions have been enhanced to use Work Queues:

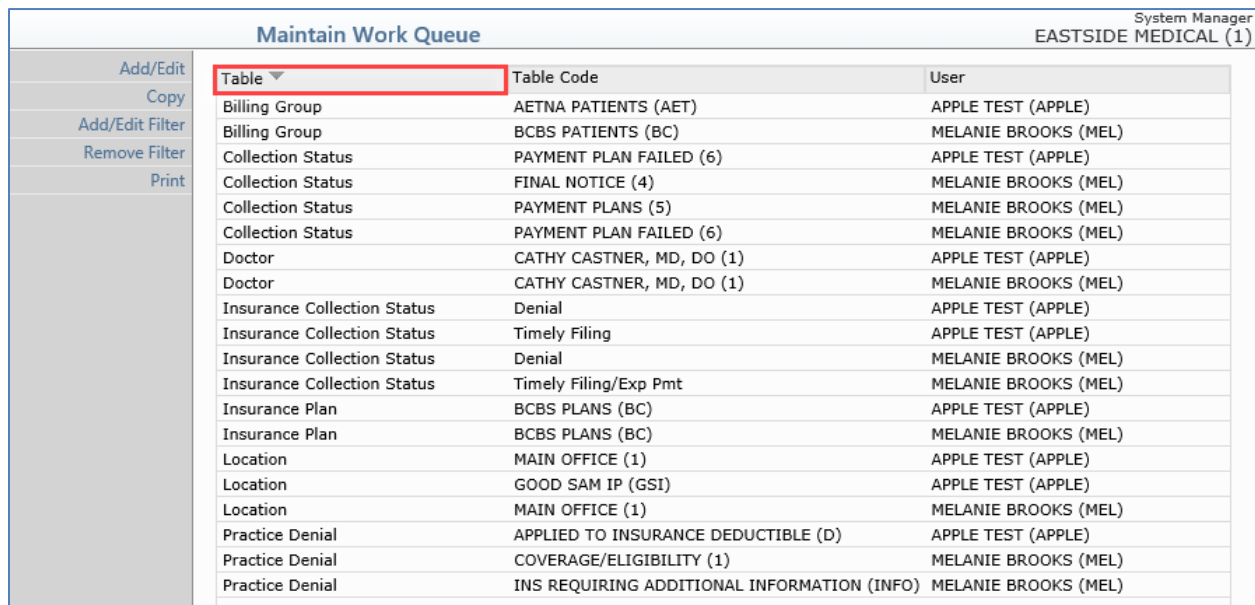
- Unposted Procedures and Pre-Treatment
- Unposted Payments
- Insurance Collections-Work Accounts
- Patient Collections-Work Accounts

## MAINTAIN WORK QUEUE

The *Maintain Work Queue* function is located on the *System* menu and allows you to assign specific Table codes to users.



Upon accessing this function, the *Maintain Work Queue* screen displays a list of every Table and any Table codes currently assigned to Users. The list displays sorted by Table, but can be re-sorted by clicking on any column heading.



System Manager  
EASTSIDE MEDICAL (1)

Maintain Work Queue

Add/Edit	Table	Table Code	User
Copy	Billing Group	AETNA PATIENTS (AET)	APPLE TEST (APPLE)
Add/Edit Filter	Billing Group	BCBS PATIENTS (BC)	MELANIE BROOKS (MEL)
Remove Filter	Collection Status	PAYMENT PLAN FAILED (6)	APPLE TEST (APPLE)
Print	Collection Status	FINAL NOTICE (4)	MELANIE BROOKS (MEL)
	Collection Status	PAYMENT PLANS (5)	MELANIE BROOKS (MEL)
	Collection Status	PAYMENT PLAN FAILED (6)	MELANIE BROOKS (MEL)
	Doctor	CATHY CASTNER, MD, DO (1)	APPLE TEST (APPLE)
	Doctor	CATHY CASTNER, MD, DO (1)	MELANIE BROOKS (MEL)
	Insurance Collection Status	Denial	APPLE TEST (APPLE)
	Insurance Collection Status	Timely Filing	APPLE TEST (APPLE)
	Insurance Collection Status	Denial	MELANIE BROOKS (MEL)
	Insurance Collection Status	Timely Filing/Exp Pmt	MELANIE BROOKS (MEL)
	Insurance Plan	BCBS PLANS (BC)	APPLE TEST (APPLE)
	Insurance Plan	BCBS PLANS (BC)	MELANIE BROOKS (MEL)
	Location	MAIN OFFICE (1)	APPLE TEST (APPLE)
	Location	GOOD SAM IP (GSI)	APPLE TEST (APPLE)
	Location	MAIN OFFICE (1)	MELANIE BROOKS (MEL)
	Practice Denial	APPLIED TO INSURANCE DEDUCTIBLE (D)	APPLE TEST (APPLE)
	Practice Denial	COVERAGE/ELIGIBILITY (1)	MELANIE BROOKS (MEL)
	Practice Denial	INS REQUIRING ADDITIONAL INFORMATION (INFO)	MELANIE BROOKS (MEL)

You can also Filter the list using the **Add/Edit Filter** Action Column button or click **Remove Filter** to remove any applied filter. You can also print the contents currently displayed on the screen to *Microsoft Excel via MyReports* using the **Print** Action Column button.

## Add/Edit a Work Queue

Click the **Add/Edit** Action Column button to assign Table codes to a User Code or edit existing code assignments for a User.

**Maintain Work Queue**
System Manager  
EASTSIDE MEDICAL (1)

User Code

▼

✓

Doctor Code

▼

Add

Location Code

▼

Add

Billing Group

Q
Add

Insurance Plan Code

▼

Add

Practice Denial Code

▼

Add

Collection Status Code

▼

Add

Insurance Collection Status

▼

Add

Assigned Codes:

Table	Code	Description	

First, you need to select the User Code you want. If any Table Codes were previously assigned to the selected User, the screen will refresh and they will display in the bottom half of the screen.

**Maintain Work Queue**
System Manager  
EASTSIDE MEDICAL (1)

User Code

▼

✓

Doctor Code

▼

Add

Location Code

▼

Add

Billing Group

Q
Add

Insurance Plan Code

▼

Add

Practice Denial Code

▼

Add

Collection Status Code

▼

Add

Insurance Collection Status

▼

Add

Assigned Codes:

Table	Code	Description	
Collection Status	4	FINAL NOTICE	<a href="#">(remove)</a>
Collection Status	5	PAYMENT PLANS	<a href="#">(remove)</a>
Collection Status	6	PAYMENT PLAN FAILED	<a href="#">(remove)</a>
Insurance Collection Status	1	Denial	<a href="#">(remove)</a>
Insurance Collection Status	5	Timely Filing/Exp Pmt	<a href="#">(remove)</a>
Billing Group	BC	BCBS PATIENTS	<a href="#">(remove)</a>
Doctor	1	CATHY CASTNER, MD, DO	<a href="#">(remove)</a>
Practice Denial	1	COVERAGE/ELIGIBILITY	<a href="#">(remove)</a>
Practice Denial	INFO	INS REQUIRING ADDITIONAL INFORMATION	<a href="#">(remove)</a>
Insurance Plan	BC	BCBS PLANS	<a href="#">(remove)</a>
Location	1	MAIN OFFICE	<a href="#">(remove)</a>

To add new codes, type or select the code for the applicable Table and click **Add**.

**Maintain Work Queue**
System Manager  
EASTSIDE MEDICAL (1)

User Code: MEL | MELANIE BROOKS (MEL) ✓

Doctor Code: 2 | ANDREW BAKER, MD (2) | **Add**

Location Code: | | **Add**

The screen will refresh and display the code just added. You can continue selecting and adding codes for this User or select a different User to add or edit their Work Queue. If you make a mistake or want to remove a code, click **Remove** in the row.

**Maintain Work Queue**
System Manager  
EASTSIDE MEDICAL (1)

User Code: MEL | MELANIE BROOKS (MEL) ✓

Doctor Code: | | **Add**

Location Code: | | **Add**

Billing Group: | Q | **Add**

Insurance Plan Code: | | **Add**

Practice Denial Code: | | **Add**

Collection Status Code: | | **Add**

Insurance Collection Status: | | **Add**

**Assigned Codes:**

Table	Code	Description	
Collection Status	4	FINAL NOTICE	(remove)
Collection Status	5	PAYMENT PLANS	(remove)
Collection Status	6	PAYMENT PLAN FAILED	(remove)
Insurance Collection Status	1	Denial	(remove)
Insurance Collection Status	5	Timely Filing/Exp Pmt	(remove)
Billing Group	BC	BCBS PATIENTS	(remove)
Doctor	1	CATHY CASTNER, MD, DO	(remove)
Doctor	2	ANDREW BAKER, MD	(remove)
Practice Denial	1	COVERAGE/ELIGIBILITY	(remove)
Practice Denial	INFO	INS REQUIRING ADDITIONAL INFORMATION	(remove)
Insurance Plan	BC	BCBS PLANS	(remove)
Location	1	MAIN OFFICE	(remove)

When you are done adding or editing Work Queues for Users, click **Save** to return to the main Work Queue screen.

## Copy a Work Queue

You can quickly copy an entire Work Queue from one User to another using the **Copy** Action Column button. Click **Copy**. The Copy screen displays containing blank data fields. Complete the required fields.

### Maintain Work Queue

Copy From User	MELANIE BROOKS (MEL) <span style="float: right;">▼</span>	✓
Copy To User	JIMMY JONES (JJJ) <span style="float: right;">▼</span>	✓
Overwrite	<input checked="" type="checkbox"/>	

**Note:** If the User you are copying to has an existing Work Queue already, you have the option to overwrite (replace) the codes or you can merge the two Work Queues together.

Click **Save**.

The main Work Queue screen will display and the Work Queue for the new User will display.

Maintain Work Queue		System Manager EASTSIDE MEDICAL (1)
Table	Table Code	User ▼
Collection Status	PAYMENT PLAN FAILED (6)	APPLE TEST (APPLE)
Insurance Collection Status	Denial	APPLE TEST (APPLE)
Insurance Collection Status	Timely Filing	APPLE TEST (APPLE)
Billing Group	AETNA PATIENTS (AET)	APPLE TEST (APPLE)
Doctor	CATHY CASTNER, MD, DO (1)	APPLE TEST (APPLE)
Practice Denial	APPLIED TO INSURANCE DEDUCTIBLE (D)	APPLE TEST (APPLE)
Insurance Plan	BCBS PLANS (BC)	APPLE TEST (APPLE)
Location	MAIN OFFICE (1)	APPLE TEST (APPLE)
Location	GOOD SAM IP (GSI)	APPLE TEST (APPLE)
Collection Status	FINAL NOTICE (4)	JIMMY JONES (JJJ)
Collection Status	PAYMENT PLANS (5)	JIMMY JONES (JJJ)
Collection Status	PAYMENT PLAN FAILED (6)	JIMMY JONES (JJJ)
Insurance Collection Status	Denial	JIMMY JONES (JJJ)
Insurance Collection Status	Timely Filing/Exp Pmt	JIMMY JONES (JJJ)
Billing Group	BCBS PATIENTS (BC)	JIMMY JONES (JJJ)
Doctor	CATHY CASTNER, MD, DO (1)	JIMMY JONES (JJJ)
Doctor	ANDREW BAKER, MD (2)	JIMMY JONES (JJJ)
Practice Denial	COVERAGE/ELIGIBILITY (1)	JIMMY JONES (JJJ)
Practice Denial	INS REQUIRING ADDITIONAL INFORMATION (INFO)	JIMMY JONES (JJJ)
Insurance Plan	BCBS PLANS (BC)	JIMMY JONES (JJJ)
Location	MAIN OFFICE (1)	JIMMY JONES (JJJ)
Collection Status	FINAL NOTICE (4)	MELANIE BROOKS (MEL)
Collection Status	PAYMENT PLANS (5)	MELANIE BROOKS (MEL)
Collection Status	PAYMENT PLAN FAILED (6)	MELANIE BROOKS (MEL)
Insurance Collection Status	Denial	MELANIE BROOKS (MEL)
Insurance Collection Status	Timely Filing/Exp Pmt	MELANIE BROOKS (MEL)
Billing Group	BCBS PATIENTS (BC)	MELANIE BROOKS (MEL)
Doctor	CATHY CASTNER, MD, DO (1)	MELANIE BROOKS (MEL)
Doctor	ANDREW BAKER, MD (2)	MELANIE BROOKS (MEL)
Practice Denial	COVERAGE/ELIGIBILITY (1)	MELANIE BROOKS (MEL)
Practice Denial	INS REQUIRING ADDITIONAL INFORMATION (INFO)	MELANIE BROOKS (MEL)
Insurance Plan	BCBS PLANS (BC)	MELANIE BROOKS (MEL)
Location	MAIN OFFICE (1)	MELANIE BROOKS (MEL)

This completes the instructions for *Maintain Work Queue*.

## UNPOSTED PROCEDURES, PRE-TREATMENT AND UNPOSTED PAYMENTS

The Work Queue operates the same in *Unposted Procedures, Unposted Payments and Pre-Treatment*. This section only describes the *Unposted Procedures* function to eliminate repetition.

Background information: the Work Queue for the User *Jimmy Jones* contains the following codes:

Assigned Codes:		
Table	Code	Description
Collection Status	1	PAST DUE REMINDER
Collection Status	2	SERIOUSLY PAST DUE
Collection Status	3	COLLECTION TURN OVER REVIEW
Insurance Collection Status	1	Denial
Billing Group	MED	MEDICARE PATIENTS
Doctor	1	CATHY CASTNER, MD, DO
Doctor	2	ANDREW BAKER, MD
Location	1	MAIN OFFICE

Upon accessing the function, the Work Queue for the User currently logged on is applied, which filters the list of procedures and displays only the Table codes assigned in the Work Queue. You can re-sort the list by clicking on any column heading. You can also remove the Work Queue filter and re-apply it using the **Remove Work Queue/Apply Work Queue** toggle Action Column button.

Unposted Procedures												JIMMY JONES EASTSIDE MEDICAL (1)			
*** Filter Applied *** (Work Queue Applied)															
Sta	Source	Account	Patient Name	Superbill	CPT	Primary Ins	P	Dr	I Dr	ICD-10 / Other	Loc	Mod	Elig	Status	Amt
<input type="checkbox"/>	E-Superbill	25691	WIZARD, WASHIE <i>Diagnosis/CPT cross-linking table error 99214 for Diagnosis 715.36.</i>	1492.1	99214	MEDICARE	1	1			1			⊖	179.00
<input type="checkbox"/>		E-Superbill	25899	TERRY, BRENT <i>Diagnosis/CPT cross-linking table error 99214 for Diagnosis 252.1.</i>	1577.1	99214	MEDICARE	1	1	OFFICE/OUTPATIENT VISIT EST	1			●	100.00
<input type="checkbox"/>		E-Superbill	25879	RAYMOND, RAY <i>CGM webCODER Validation Failed.</i>	10438.7	99213	PACIFICSOURCE CHOICE	1	1	G44.001 ROUTINE VENIPUNCTURE	1			⊖	73.00
<input type="checkbox"/>		E-Superbill	26051	HARDING, LEROY <i>CGM webCODER Validation Failed.</i>	36415			1	1	W21.11XD	1			⊖	20.00
<input type="checkbox"/>		E-Superbill	26022	DIOMEDE, KATHERINE <i>CGM webCODER Validation Failed. Invalid ICD-10 code. A more specific code is required...G44.20.</i>	10331.7	99213	MEDICARE	1	1	G44.20, H66.93, SS2.S21A	1			⊖	150.00
<input type="checkbox"/>		E-Superbill	25778	CRICKET, JIMINY <i>Diagnosis/CPT cross-linking table error 99214 for Diagnosis 715.36.</i>	1491.1	99214	MEDICARE	1	1	G44.20, H66.93, SS2.S21A	1			●	179.00

You can further Filter the list of procedures displayed using the **Add/Edit Filter** Action Column button or remove any additional applied filter settings using **Remove Filter**. You can also print the contents currently displayed on the screen to *Microsoft Excel via MyReports* using the **Print** Action Column button.



## WORK ACCOUNTS IN PATIENT COLLECTIONS AND INSURANCE COLLECTIONS

The Work Queue operates the same in both *Work Accounts* functions. This section only describes the *Patient Collections Work Accounts* function to eliminate repetition.

Upon accessing the function, the Work Queue for the User currently logged on is immediately applied, and the Work Accounts screen is displayed with the list of patient accounts and displays only the Table codes assigned in the Work Queue. You can re-sort the list by clicking on any column heading. You can also remove the Work Queue filter and re-apply it using the **Remove Work Queue/Apply Work Queue** toggle Action Column button.

Work Accounts								JIMMY JONES EASTSIDE MEDICAL (1)
<a href="#">Next Account</a> <a href="#">Add/Edit Filter</a> <a href="#">Remove Filter</a> <a href="#">Remove Work Queue</a> <a href="#">EMEDIX Website</a> <a href="#">Change Status</a>	<b>*** Filter Applied ***</b> (Work Queue Applied)							
Acct	Name ▼	Wrk	Balance	Grp	Loc	Dr	Status	
<input type="checkbox"/> 25696	Antoinette, Marie	N	55.00	MED	1	1	2	
<input type="checkbox"/> 26035	WASHINGTON, RONALD	N	-17.16	MED	1	1	1	

You can further Filter the list of accounts displayed using the **Add/Edit Filter** Action Column button or remove any additional applied filter settings using **Remove Filter**.