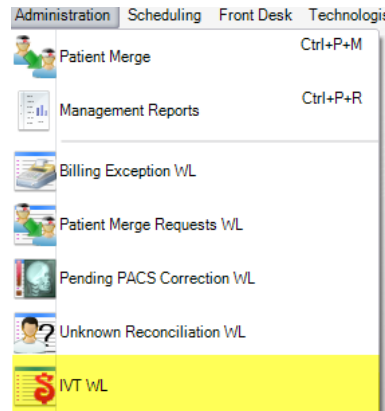


IVT TRAINING JOB AID/REFERENCE

- The IVT Worklist contains appointments that require Pre Certification AND/OR Insurance Verification.
 - These actions are at the Order level; therefore, if at least 1 exam requires an action, then all exams for that Order will be listed in the WL. As soon as the exam that is requiring an action is complete, all other exams associated with that Order will be removed from the WL.
- To access this Worklist, select Administration>IVT WL



- The WL can be filtered and sorted many ways.
 - For Filters, reference your "Creating a Worklist View" job aide.
 - To Sort a Column, click in the column header (Grey Box).
 - To change the sorting of a column from Ascending to Descending order, click again. (The example below show the Scheduled Date column is sorted. This is identified by a small arrow.)

Flags	Status	Procedures	Scheduled Date	Referring	Sedation	First Name	Last Name	MRN	Room	Accession #	Exam STAT
▼	▼		▼		▼	▼	▼	▼	▼	▼	▼

- Records that are populated here, again, are for Pre Certification AND/OR Insurance verification. Columns will display that status of each when required.
 - Blank – Does not require action.
 - Required – Indicates that action is needed.
 - Approved – Indicates that action is done and Approved.
 - Pending Response – Action started but not yet completed.
 - Denied – Denied.
- To select an exam from the WL, you can simply DOUBLE CLICK on that exam record.

The screenshot shows a patient record with the following tabs: Patient, Insurance Verification PreCert, Order \ Exam, and Attachments. The "Patient" tab is selected, showing insurance policies for Note 1116, Carrier Code MEDICARE N, Carrier Name EMPIRE, and Policy Number 089901508M. Annotations include:

- View only access to the patient demographics** (pointing to the Patient tab)
- Default tab with all IVT information** (pointing to the Insurance Verification PreCert tab)
- View only access to procedure information** (pointing to the Order \ Exam tab)
- Access to create an attachment or view existing, user can view all attachments under the patient by selecting the "Show all documents for patient" checkbox** (pointing to the Attachments tab and the checkbox)



IVT TRAINING JOB AID/REFERENCE

IVT WL (467) IVT : [redacted]

Patient Insurance Verification PreCert Order \ Exam Attachments

Insurance Policies

Note	Carrier Code	Carrier Name	Policy #	Group Name	Group Number	Phone	Priority
	0307	BCBS MD HMO	CIP843057824		90030		Primary

Billing Method

(Bill to insurance)

04-09-13 LambdinJ -

Manage Policies

Verification REQUIRED Insurance verified Amount to collect []

Verification and PreCert Notes

04-09-13 LambdinJ -

Order Notes

04-09-13 LambdinJ -

03-05-13 McClungJ - NOT DIABETIC, NO KD, NO ALLERGIES, PLEASE CALL PT FOR SOONER APPT

Billing Code Information

ABN	PreCert #	Expiry Date	PreCert Status	Billing Code	Active
Procedure: CT Abdomen and Pelvis W (CT402)					
			Required	(72193) COMPU... Y	
			Required	(74160) COMPU... Y	
			Required	(Q9967) LOW O... Y	

Show previous precert and CPT codes

Save Close

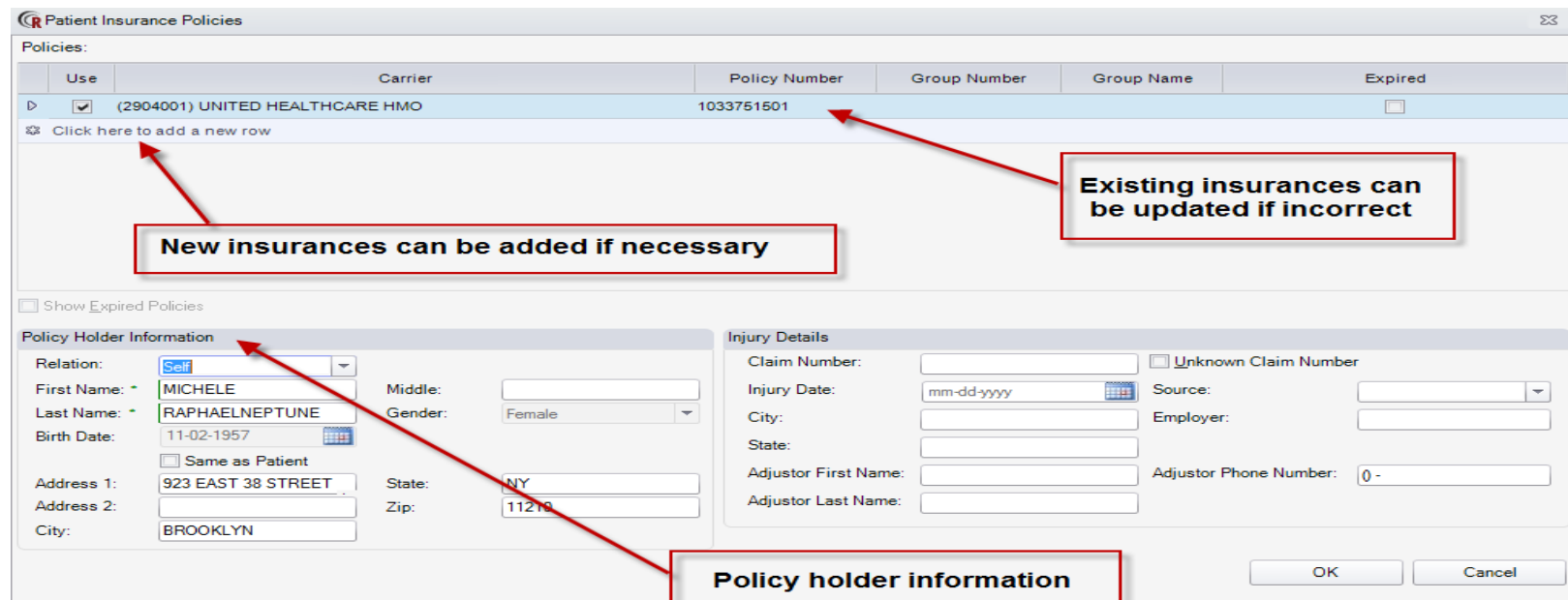
1. Insurance Information
 - a. Displays the insurances picked by Scheduling.
2. Insurance Verified
 - a. If required, the check box will be active. To Approve this action and mark the insurance as Verified, click the check box.
3. Amount to Collect

IVT TRAINING JOB AID/REFERENCE

- a. If during the verification process it's known that the patient has a co-pay or deductible that should be collected at the time of Registration, you have the ability to enter that amount here.
4. Verification and Pre-Cert Notes
 - a. This is where you have the ability to document notes pertaining to Verification and Pre Certification.
5. Order Notes
 - a. This is where you can see the notes entered during Scheduling.
6. Billing Code Information
 - a. Will display the CPT(s) for the exam along with the Pre-Cert status.

➤ Manage Policies

- Select Manage Policies – This is where you have the ability to verify or enter insurances for the patient/exam.
 - If the patient is a return patient, previously used insurances will display. To use 1 or more insurances currently listed, click the USE check box next to the insurance.
 - To add insurance, enter the name and click Search.
 - Show Inactive Policies will display insurances that were once entered, but since marked as Inactive.
 - Policy Number, Group Number (if applicable) and Subscriber information is required. Injury details are required if the insurance is a Workers Comp, Auto carrier or Attorney.
 - After all insurances (and details) have been entered and the USE checkbox clicked, click OK in the Manage Policies window.



The screenshot shows the 'Patient Insurance Policies' window. It features a table with columns: Use, Carrier, Policy Number, Group Number, Group Name, and Expired. A row is selected for '(2904001) UNITED HEALTHCARE HMO' with Policy Number '1033751501'. A red box highlights the 'Click here to add a new row' link with the text 'New insurances can be added if necessary'. Another red box highlights the selected row with the text 'Existing insurances can be updated if incorrect'. Below the table, there are sections for 'Policy Holder Information' and 'Injury Details'. A red box highlights the 'Policy Holder Information' section with the text 'Policy holder information'. The 'Policy Holder Information' section includes fields for Relation (Self), First Name (MICHELE), Last Name (RAPHAELNEPTUNE), Birth Date (11-02-1957), Address 1 (923 EAST 38 STREET), and City (BROOKLYN). The 'Injury Details' section includes fields for Claim Number, Injury Date, City, State, Adjustor First Name, and Adjustor Last Name.

IVT TRAINING JOB AID/REFERENCE

➤ Pre-Certification

- If required, enter the Pre Cert number in the field for that CPT. You can also enter an Expiration data and/or change the status from Required to the appropriate status; Approved, Pending Response, Denied, etc.

Billing Code Information					
ABN	PreCert #	Expiry Date	PreCert Status	Billing C	
▲ Procedure: MA Digital Screening Mammo W CAD (G0202)					
			Not Req		
			Not Req		

PreCert # and Expiry Date entered in these fields

Billing Code Information					
ABN	PreCert #	Expiry Date	PreCert Status	Billing C	
▲ Procedure: CT Chest WO (71250)					
			Required	(71250) COMPUTED TOM	

PreCert Status can be changed using dropdown

Insurance Verification Status	
Contains: a	▼ C
Approved	AI

- After completing the record, click Save.
 - When all criteria required for this record is complete, the record will fall off the IVT Worklist.