Pre-Appointment Checklist (versions 1.1) Hot Card

Work Queue (WQ) Indicators:
- RED - no tasks have been completed.
- YELLOW - tasks in the tab are in progress.
- GREEN - all tasks have been completed

If no colors display for a patient, a checklist has NOT been started.

Who do I call if...
1. the WQ goes down, I am unable to select a button for a task, or to gain access to the WQ?
   **Call the Help Desk (34357) for any technical problems.

2. I need help using the WQ Checklist?
   **Call your Support Trainer for any training needs or other procedural questions.

Copying Checklists:
- Copying is only permissible to a future appointment and not a past appointment.
- Show History will display who copied the checklist, from which appointment it was copied, and the appointment to which it was copied.
- If the appointment date is older than 30 days, the checklist will not be available for copying forward.

Un-checking an Answer on the Checklist (i.e. selected Y instead of N):
1. Click on the link, Uncheck an answer, located at the bottom of the tab.
2. Next, click on the button you want to deselect and the green dot will disappear.
Helpful Hints for using the Checklist (1.1):

If you did it – check Y (Yes).

If it is not applicable for this patient (e.g., an insurance referral not required for a Medicare patient)– choose N/A (Not Applicable).

If you intend to do it or it needs to be completed in the future – leave it blank (this way it will continue to show up as yellow on the indicators in the work queue as in progress).

If you do not know if you should do it – leave it blank. This way the indicator will be either red or yellow alerting the Pre-Appointment Coordinator to follow up.

Entering Comments for a Task

When entering a new comment for a specific task, remove the existing information first. To view previous task specific comments, simply click on the task and the history of comments will display.