



# Queue Manager

## *Training Manual*

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## Overview

The Queue Manager is a tool within eCare NEXT designed to allow client administrators, management, and leadership to create custom queues for staff based on the needs of departments and individual users. These queues can be powerful workflow tools that help streamline and manage registration tasks and processes. eCare NEXT's exception-based work queues allow users to focus on only items that require additional attention or action.

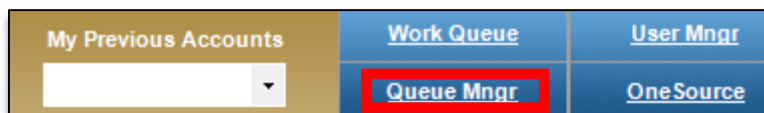
The Queue Manager is used to determine specific criteria for each queue. These queues may then be assigned to individuals or groups of users who will need to have access to the queue. With so many possible customizations and combinations, there's virtually no limit to the number of queues you can create.

Generally speaking, queues are created to define workflow for account follow up. Many queues are driven by the information sent from the facility's **Health Information System (HIS)** or **Practice Management System (PMS)** to Passport via **Health Level 7 (HL7)** messages. For **In-Process Scripting (IPS)** clients, certain fields may also be sent via IPS messages. Because HIS and PMS programs and configurations differ by facility, some messages do not include all of the information that Passport has the capability to process. Depending on the information transmitted in your facility's messages, there may be certain filters in the queue manager that may not be applicable to your facility. The filter values shown in this manual are provided as examples only and are not reflective of the values available at every facility.

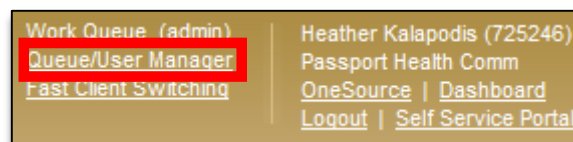
## Getting Started

Users who have been granted access to the Queue Manager may access the tool via the Work Queue or the NEXT Bar.

To access the Queue Manager through the NEXT Bar, click the **Queue Manager** link on the right side of the NEXT Bar. The Queue Manager will open in your web browser.



To access the Queue Manager through the work queue, click the **Queue/User Manager** link located in the top right corner of the work queue.

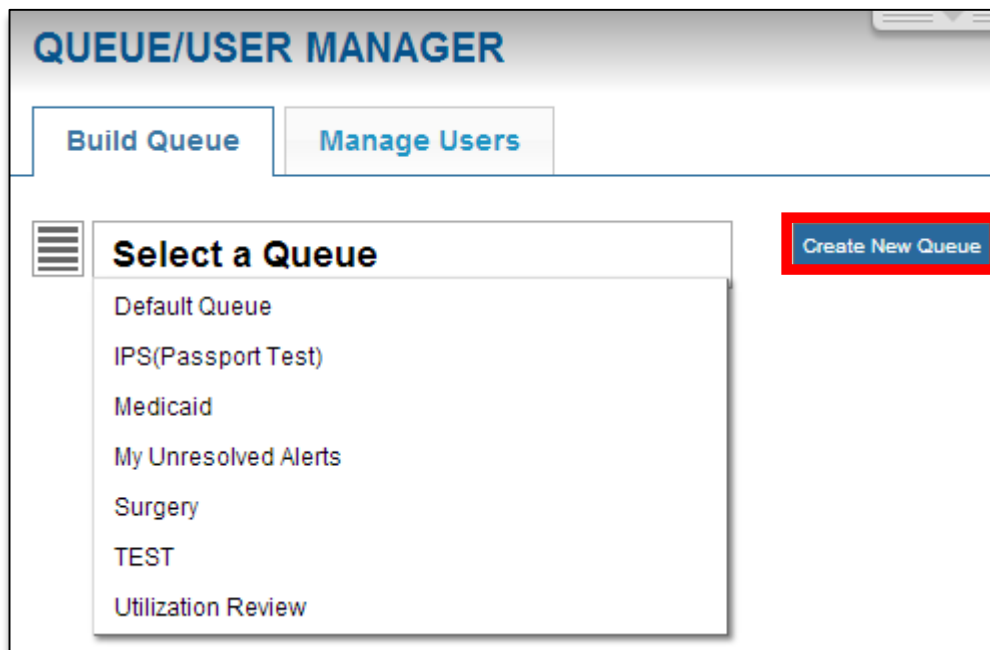


## Queue Menu

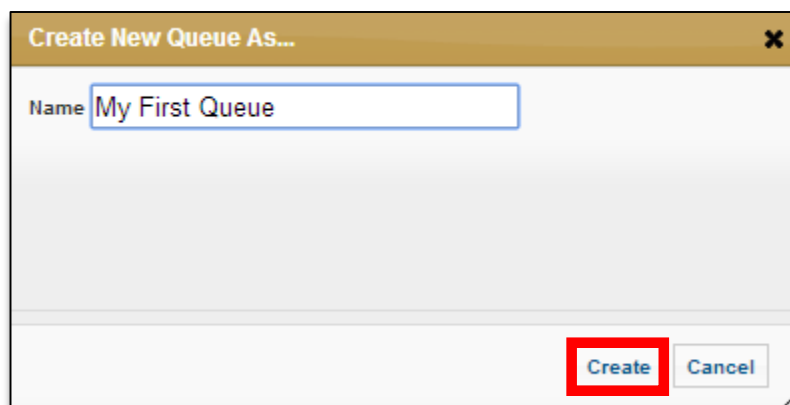
A listing of all queues will be displayed. The Queue Manager can be used to edit existing queues or to create new ones. To edit an existing queue, you may select an available queue from the list.

*Though the Default Queue is an available option on this list, please do **not** edit, rename, or delete this queue. The Default Queue is set up by Passport during implementation. Modifying or deleting this queue can cause issues and errors within the work queue.*

Depending on a user's permissions, this list may contain all queues either created or assigned to that user, or all queues at the client level. To open an existing queue, click the name of the queue. To create a new queue, click **create new queue**.



A pop-up window will display, prompting the user to name the queue. Type the desired queue name, then click **create**.



## Queue Building

After clicking on **create**, the following page will display:

The screenshot displays the Queue Building interface, divided into two main sections: Available Filters and Queue Profile.

**Available Filters:** This section contains a list of filters on the left side, including OVR, PT, AL, DEM, COV, NOA, AUTH, EST, and USER. The main area contains various filter fields with comparison operators and plus signs to add them to the queue profile. The filters include:

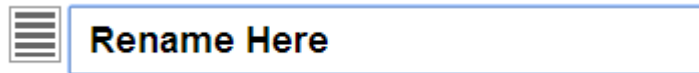
- Is Done (radio buttons for Yes/No)
- WorkCenter Status (text input)
- Patient Last Name (range selector with A and M markers)
- Patient Date Of Birth (Age dropdown and Years input)
- Patient Status (text input)
- Patient Type (text input)
- Patient Class (text input)
- Is Self Pay (radio buttons for Yes/No)
- Financial Class (text input)
- Encounter Number (text input)
- Event Type (text input)
- Admission Type (text input)
- Facility Code (text input)
- Facility Name (text input)
- Area (text input)
- Location (text input)
- Service Code (text input)
- Accommodation Code (text input)
- Attending Doctor (text input)

**Queue Profile:** This section contains a dashed box for the queue name, Sort Queue by (Date Updated), Sort Order (Descending), and checkboxes for Ignore Transaction Ownership and Open After Save. A Save Queue button is located at the bottom.

The majority of the queue building page is taken up by the **available filters** on the left and the **queue profile** on the right. Filters are added to the queue profile to create the logic behind the queue. The available filters and queue profile will be discussed at length later in the manual.

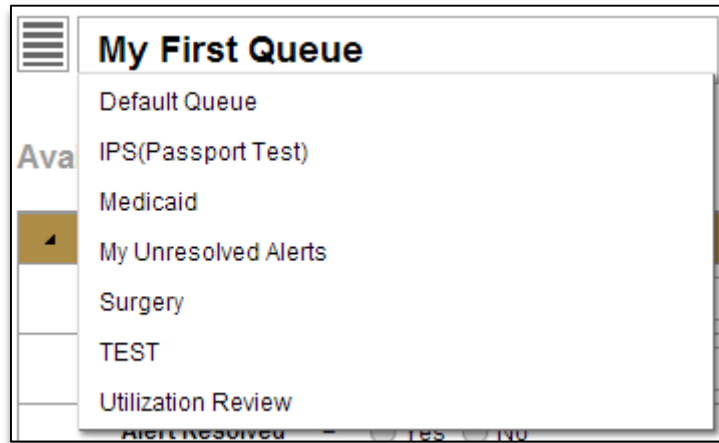
The name of the active queue will be listed on upper left side of the page. If desired, users may rename the queue by overwriting the text in this field.

*Please do **not** rename the Default Queue.*





To quickly switch between queues, click the  icon. Users may choose the queue they would like to navigate to from the available list.



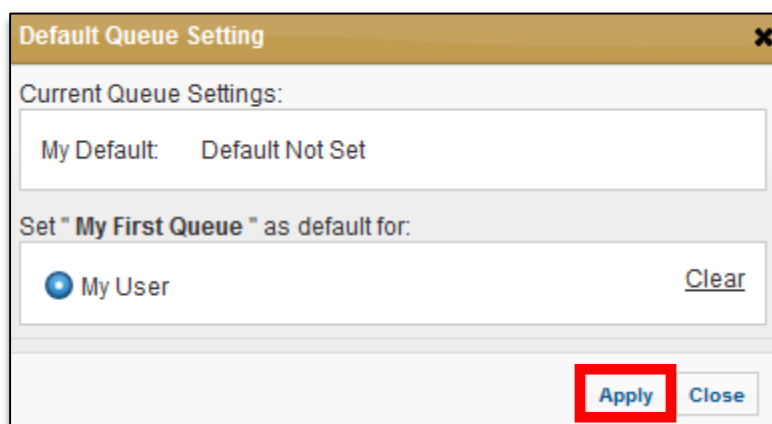
Several buttons will be displayed to the right of the queue name.



**Create New Queue** – Click this button to start a new queue. You will be prompted to enter a queue name.

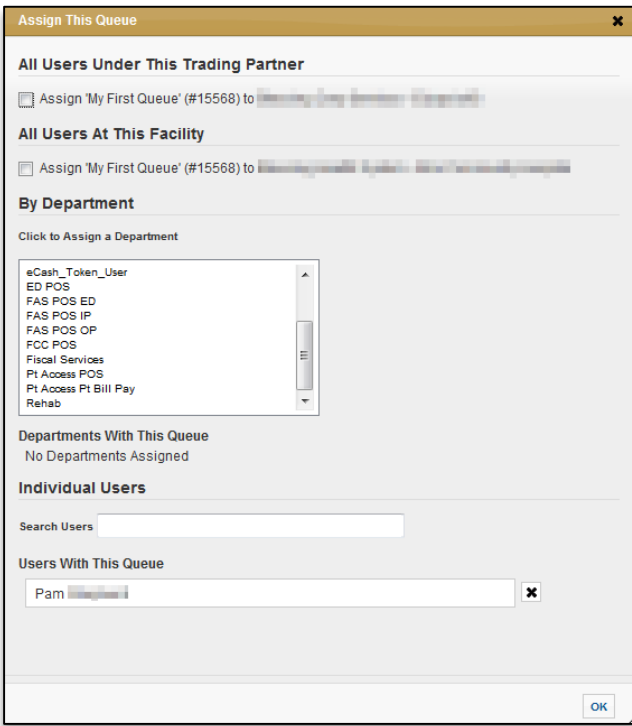
**Set Default** – Click this button to designate the active queue as the default queue. This means that when accessing the work queue, the page will automatically load the selected queue. (This is different than the Default Queue established during implementation by Passport, which generally contains all patients registered by the user and should not be modified.)

Upon clicking **set default**, the **default queue setting** window will appear. Click the radio button next to the desired action, then click **apply**.



The example above shows a user who has access to designate the default queue for themselves, but not for other users.

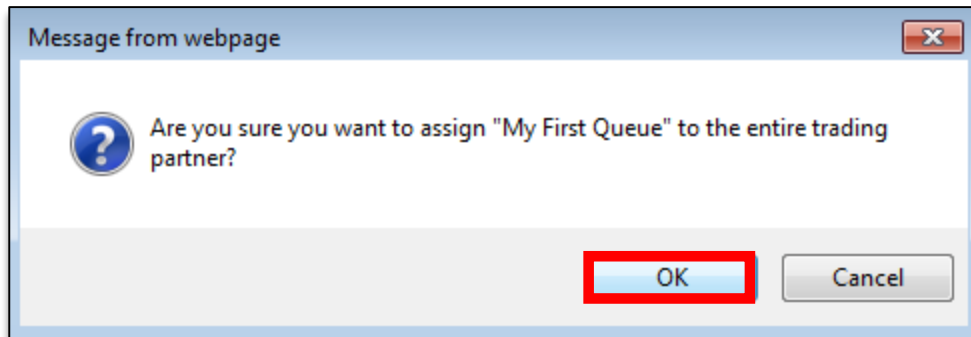
**Assign Queue** – This function allows the user to assign which users will be able to view the queue. Queues may be assigned to individual users, as well as at the trading partner, facility, and department levels. Queues may also be assigned via the **User Manager**, which will be discussed later in the manual.



**Trading Partner Level** – Choosing this option will assign the queue to all users under the Passport Trading Partner ID. For example, if your hospital is part of a ten-hospital system using eCare NEXT, checking this option would assign the queue to every eCare NEXT user at all ten hospitals.



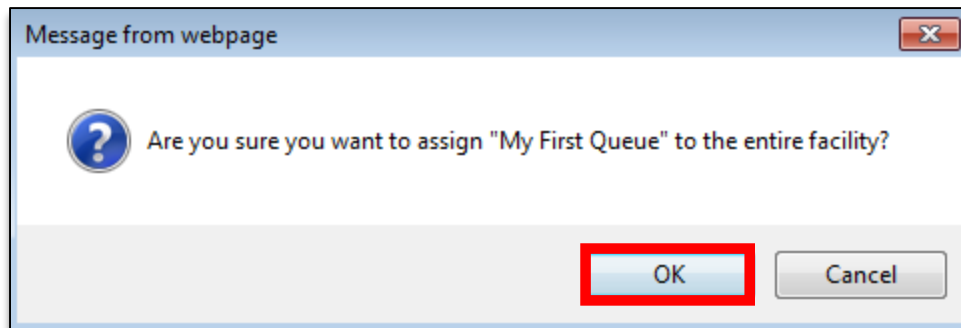
Due to the far-reaching nature of this option, a prompt will display asking the user to confirm that they want to assign the queue to all users at the trading partner level. Click **OK** to confirm, but keep in mind that this will assign the queue to all users at all facilities at the trading partner level. For this reason, this option is not frequently used.



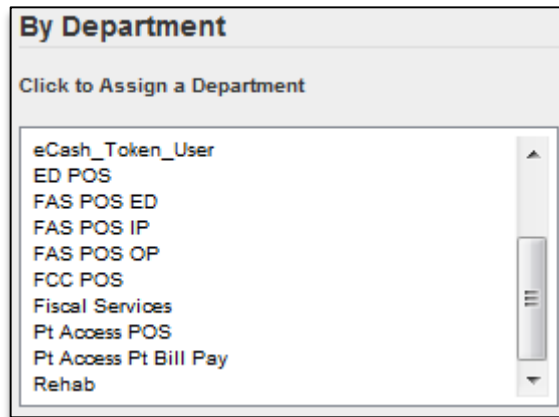
**Facility Level** – This option will assign the active queue to all users at the facility level. Checking this option will assign the queue to all users at the facility.



After clicking this option, a prompt will display asking for confirmation. Click **OK** to confirm this action.



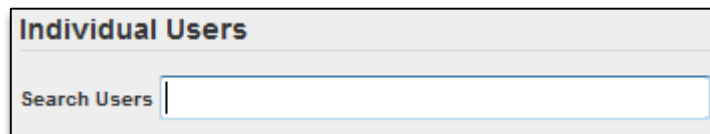
**Department Level** – This option will allow a queue to be assigned to all users in a specified department.



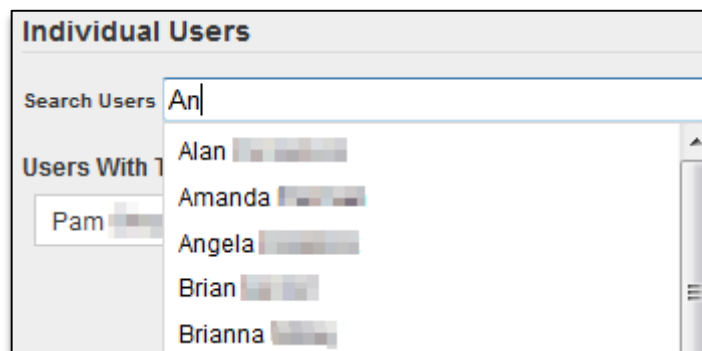
Click the desired department to assign the queue to all users in that department. Departments that have been assigned the queue will appear under **Departments with This Queue**. If a department has been assigned a queue in error, click **X** to remove the department.



**Individual User Level** – This option allows queues to be assigned to a specific user or users.

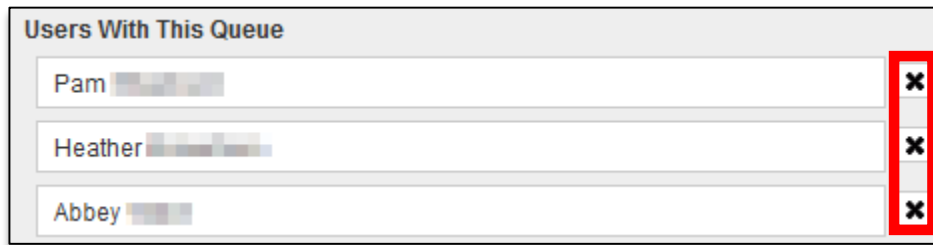


Begin typing the user's name into the **search users** field. Results will populate as the user types. These results will narrow as the user continues to type. Click on the user's name to assign the queue to them. Repeat for each user as needed.



The user's name will now appear under **Users with This Queue**. If a user has been assigned in a queue in error, click **X** to remove the user.

Please note, the name of the queue creator will be listed in this section automatically.



**Copy Queue** – This button makes a copy of the current queue. This is a useful time-saver that allows users to use elements of an established queue in the creation of a new queue. All criteria from the original queue will be carried over to the copy, allowing users to quickly and easily create multiple queues.

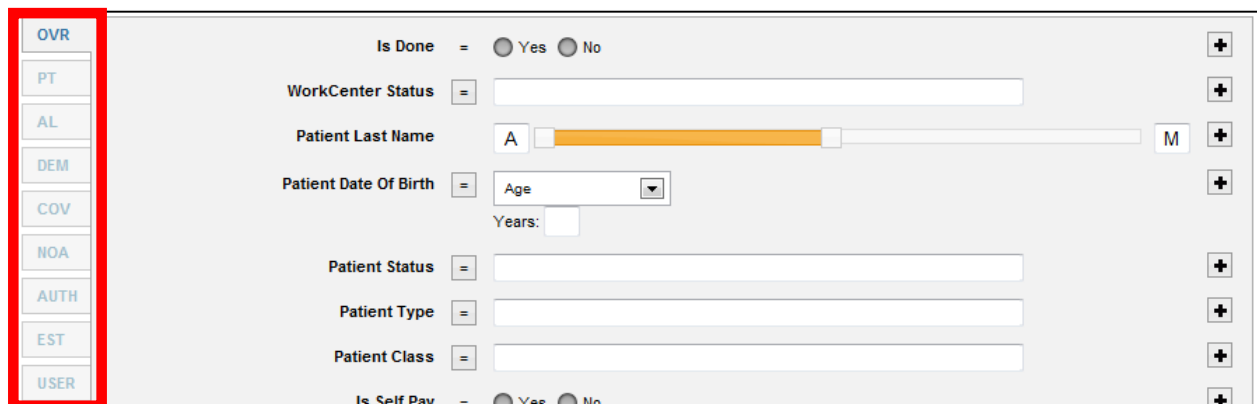
**Delete Queue** – This button will delete all instances of the active queue. Any users who had been assigned this queue will no longer have access to it.

*Note: Do **not** delete the default queue.*

### Available Filters

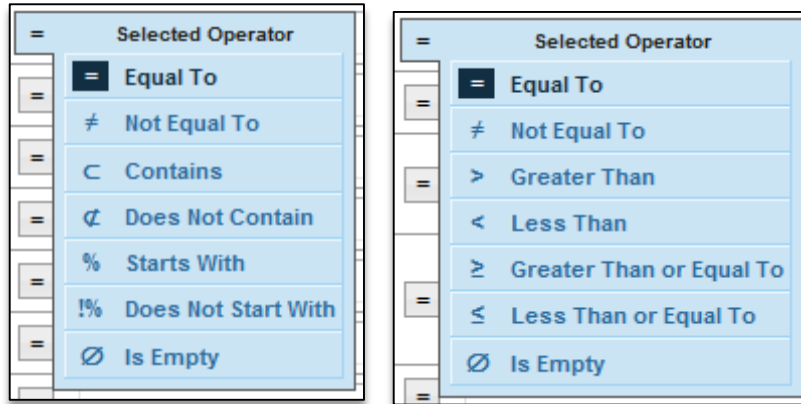
Filters are used to define the criteria for the queue. Users may add multiple filters to a queue to create specialized work queues that meet their workflow needs. Keep in mind that while queues should utilize as many filters as necessary to exclude accounts that do not meet the specified criteria, users should still be cautious of using an excessive number of filters, as this may narrow the number of patients that match the criteria and result in few or no patients being listed in the queue.

The available filters are sorted into categories by vertical tabs on the left side of the page. This design is intended to help users locate the type of filter they need by organizing most of the filters by product using tabs that correspond to the product chevrons within eCare NEXT. The filter categories are **Overview (OVR)**, **PatientTrack (PT)**, **Alerts (AL)**, **Demographics (DEM)**, **Coverage (COV)**, **Notice of Admission (NOA)**, **Authorization (AUTH)**, **Estimate (EST)**, and **User Defined (USER)**. Click on the desired tab to view the filters within that category.




## Operators

By default, operators for all filters will be set to **equal to**. Most users will not need to change this for the majority of their queue creation needs, but there may be instances in which a user desires to add a filter with a different operator. Hover over the equal sign to view other operator options for a specific filter, including **not equal to**, **contains**, **does not contain**, **starts with**, **does not start with**, **is empty**, **greater than**, **less than**, **greater than or equal to**, and **less than or equal to**.



## Add to Queue

Most filters are added to the queue profile using the  button located to the right of each filter. Clicking this button adds the filter as a property of the queue.

## Overview

The overview category contains general filters that can be used across many products within eCare NEXT.

Is Done =  Yes  No +

WorkCenter Status = +

Patient Last Name A [range] M +

Patient Date Of Birth = Age [dropdown] +  
Years: [input]

Patient Status = +

Patient Type = +

Patient Class = +

Is Self Pay =  Yes  No +

Financial Class = +

Encounter Number = +

Event Type = +

Admission Type = +

Facility Code = +

Facility Name = +

Area = +

Location = +

Service Code = +

Accommodation Code = +

Attending Doctor = +

Department = +

Triggered User = [input] Select +

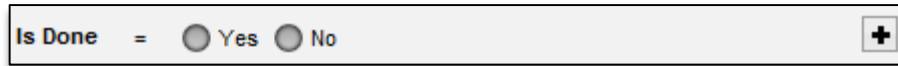
Date Created (days from current date) [-5] [range] [5] +  
07/17/15 today 07/27/15  
(example dates above are based on today's date)

Date Updated (days from current date) [-5] [range] [5] +  
07/17/15 today 07/27/15  
(example dates above are based on today's date)

Admission Date (days from current date) Sliding Range [dropdown] [-5] [range] [5] +  
07/17/15 today 07/27/15  
(example dates above are based on today's date)

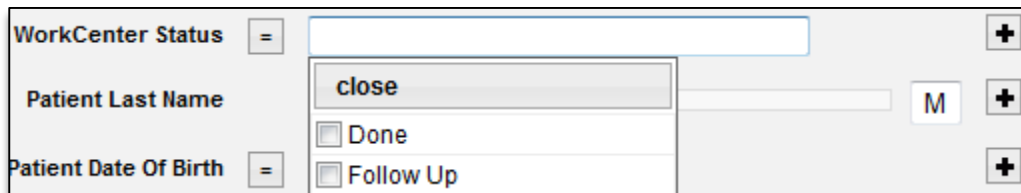
### Is Done

This filter is used in conjunction with the **status** column in eCare NEXT work queue. When enabled, the status function allows accounts to be marked as **done** once the account has been worked. To create a queue of all accounts with the “done” status, click **yes**. To create a queue of all accounts that are not done, click **no**. Click **+** to add the criteria to the queue profile on the right side of the page. The queue profile lists all of the different filters that make up the queue. The queue profile will be discussed in greater detail later in the manual.



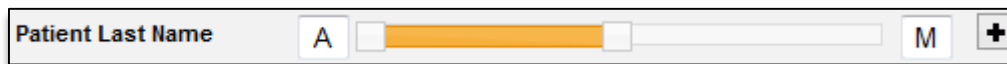
### WorkCenter Status

Use this filter to create a queue based on the **WorkCenter Status**. This refers to the **status** column of the work queue that is present for some facilities. Statuses are fully customizable and will vary by facility. Place your cursor in the field to see the available statuses for your facility. If no statuses are present, this feature is not currently being utilized at your facility. Place a checkmark next to the desired status(es), then click **close**. Click **+** to add the criteria to the queue.



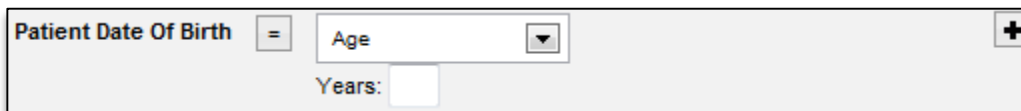
### Patient Last Name

To filter patients based on **last name**, move the slider to show the desired letters. In the filter below, only patients with last names beginning with letters A through M will be present in the queue. Click **+** to add the criteria to the queue.



### Patient Date of Birth

Use this filter to create a queue based on patient **age** or **date of birth**. To filter the queue based on age, enter an age in years into the field. Click **+** to add the filter to the queue.





### Patient Status

Use the **Patient Status** filter to create a queue containing only patients belonging to selected patient statuses sent from your registration system – for example, ADM, DEP, DIS, PRE, or REG. Values will vary by HIS/PMS. Place your cursor in the field to see the available statuses for your facility. Place a checkmark next to the desired status(es), then click **close**. Click **+** to add the criteria to the queue.

Patient Status	=	<input type="text"/>	+
Patient Type	=	<input type="text"/>	+
Patient Class	=	<input type="text"/>	+
Is Self Pay	=	<input type="text"/>	+

### Patient Type

Use the **patient type** filter to create a queue containing only patients belonging to selected patient types sent from your registration system. Place your cursor in the field to see the available patient types for your facility. Place a checkmark next to the desired status(es), then click **close**. Click **+** to add the criteria to the queue.

For example, if a facility’s registration system designates all inpatients with a patient type of “I”, a user wishing to have a queue consisting of only inpatients would select “I” from the dropdown menu.

Patient Type	=	<input type="text"/>	+
Patient Class	=	<input type="text"/>	+
Is Self Pay	=	<input type="text"/>	+
Financial Class	=	<input type="text"/>	+

### Patient Class

Use this filter to create a queue based on the **patient class** that is sent to Passport in the HL7 message. Place your cursor in the field to see the available patient classes for your facility. Place a checkmark next to the desired class(es), then click **close**. Click **+** to add the filter to the queue.

Patient Class	=	<input type="text"/>	+
Is Self Pay	=	<input type="text"/>	+
Financial Class	=	<input type="text"/>	+
Counter Number	=	<input type="text"/>	+
Event Type	=	<input type="text"/>	+
Admission Type	=	<input type="text"/>	+

### Is Self Pay

For an example of the recommended method of creating a self pay queue, see the **Example Queues** section of the manual.

To create a queue of only self pay users, choose **yes**. To exclude self pay patients from a queue, choose **no**. Click **+** to add the criteria to the queue.



### Financial Class

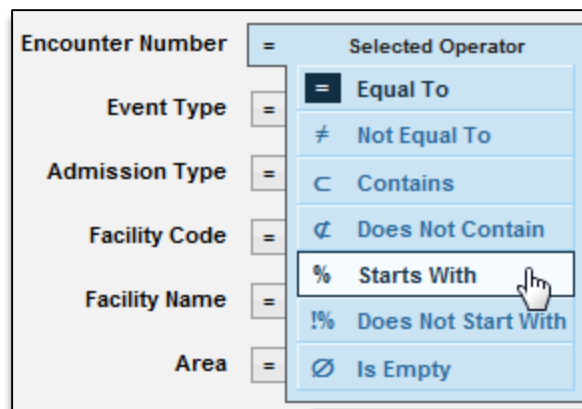
Use this filter to create a queue based on the patient's **financial class** found in the HL7 message. Place a checkmark next to the desired class(es), then click **close**. Click **+** to add the filter to the queue.



### Encounter Number

The **encounter number** filter is often used to create a queue of patients that have a distinct commonality in their encounter numbers. For example, say all of a hospital's recurring accounts begin with "R123".

To create a queue of all recurring accounts, users would first need to change the operator from **equal to** so that it instead reads **starts with**. Hover over the equals sign, and click **starts with**.



Notice that the operator now shows % instead of =. Next, type the desired string in the text field and click **+** to add the criteria to the queue.



### Event Type

Use **event type** to filter the queue based on the message type. Examples include IPS messages, 270 or 278 requests, or HL7 messages such as A01 (admit), A04 (registration), A05 (pre-admission), or A08 (update). Place a checkmark next to the desired event type(s), then click **close**. Click **+** to add the filter to the queue.

Event Type	=	<input type="checkbox"/>
Admission Type	=	<input type="checkbox"/>
Facility Code	=	<input type="checkbox"/>
Facility Name	=	<input type="checkbox"/>
Area	=	<input type="checkbox"/>
Location	=	<input type="checkbox"/>

- 270
- 278
- A01
- A04
- A05
- A06
- A08

close

### Admission Type

Use the **admission type** filter to add queue logic driven by the patient's admission type. Place the cursor in the field to display a dropdown menu of potential options. Select the desired admission type, then click **close**. Click **+** to add the criteria to the queue.

Admission Type	=	<input type="checkbox"/>
Facility Code	=	<input type="checkbox"/>
Facility Name	=	<input type="checkbox"/>
Area	=	<input type="checkbox"/>

- 1
- 2
- 3

close

### Facility Code

Use this filter to create a queue based on the facility code contained in the HL7 message. Place a checkmark next to the desired code(s), then click **close**. Click **+** to add the criteria to the queue.

Facility Code	=	<input type="checkbox"/>
Facility Name	=	<input type="checkbox"/>
Area	=	<input type="checkbox"/>

- 100001
- 20

close

### Facility Name

This filter will mainly be used by Batch clients. Use this filter to create a queue based on the facility name contained in the batch file. Place a checkmark next to the desired name(s), then click **close**. Click **+** to add the criteria to the queue.

Facility Name	=	<input type="text"/>	+
Area	=	close	+
Location	=	<input type="checkbox"/> 100001 Hospital	+
Service Code	=	<input type="checkbox"/> TEST1	+
		<input type="checkbox"/> Testing	+

### Area

Use this filter to create a queue based on the area that is sent to Passport in the HL7 message. Place a checkmark next to the desired area(s), then click **close**. Click **+** to add the filter to the queue.

Area	=	<input type="text"/>	+
Location	=	close	+
Code	=	<input type="checkbox"/> 021	+
		<input type="checkbox"/> 57	+

### Location

Use this filter to create a queue based on the patient's **location** that is sent to Passport in the HL7 message. At many facilities, the location value may often correspond to a wing or floor of the building, for example, 3E or 3W. Place a checkmark next to the location(s), then click **close**. Click **+** to add the filter to the queue.

Location	=	<input type="text"/>	+
Service Code	=	close	+
Location Code	=	<input type="checkbox"/> 00MS	+
Location Doctor	=	<input type="checkbox"/> 452	+
		<input type="checkbox"/> B014E	+

### Service Code

Use this filter to create a queue based on the patient's **service code** contained in the HL7 message. Place a checkmark next to the desired code(s), then click **close**. Click **+** to add the filter to the queue.

Service Code = [ ] +

Accommodation Code = [ ] +

Attending Doctor = [ ] +

Department = [ ] +

Triggered User = [ ] +

Date Created (days from current date) [ ] +

close

30

30^98

45

62

EEMEC1

EMD

EMR

Select

5

### Accommodation Code

Use this filter to create a queue based on the patient's **accommodation code** from the HL7 message. Place a checkmark next to the desired code(s), then click **close**. Click **+** to add the filter to the queue.

Accommodation Code = [ ] +

Attending Doctor = [ ] +

Department = [ ] +

Triggered User = [ ] +

close

^NO

EYE

INTENSIVE CARE^L

SEM

Select

### Attending Doctor

Use this filter to create a queue based on the patient's attending physician. Place a checkmark next to the desired physician(s), then click **close**. Click **+** to add the filter to the queue.

Attending Doctor = [ ] +

Department = [ ] +

Triggered User = [ ] +

Date Created (days from current date) [ ] +

close

AAZY, [ ]

AGUILAR, [ ]

BANNURU

BRAY

COY

CYRIL, [ ]

Select

5

07/26/15

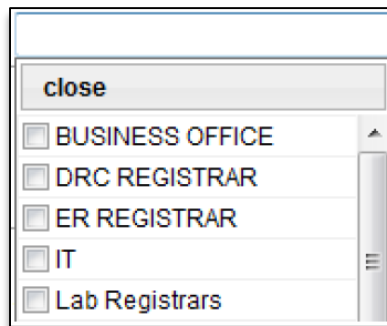
(based on today's date)

## Department

The **department** filter was originally intended as a Batch-specific filter that supplements the location field.

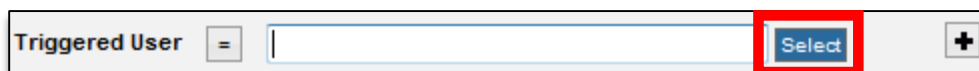


However, some facilities may have a permission enabled that allows them to use this filter to build queues based on the departments that have been set up in the Self-Service Portal. Place a checkmark next to the desired department(s), then click **close**. Click **+** to add the filter to the queue.

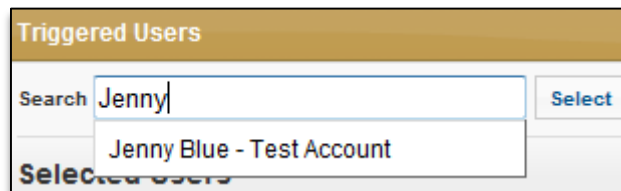


## Triggered User

Click **select** to choose the desired **triggered user(s)**. The triggered user is the initial user that ran the transaction. This filter will show accounts for which the users was the first to run a transaction for that account regardless of the message type. To filter by user and message type, use the **initialized by user** filter. Click **select** to choose the triggered user(s).



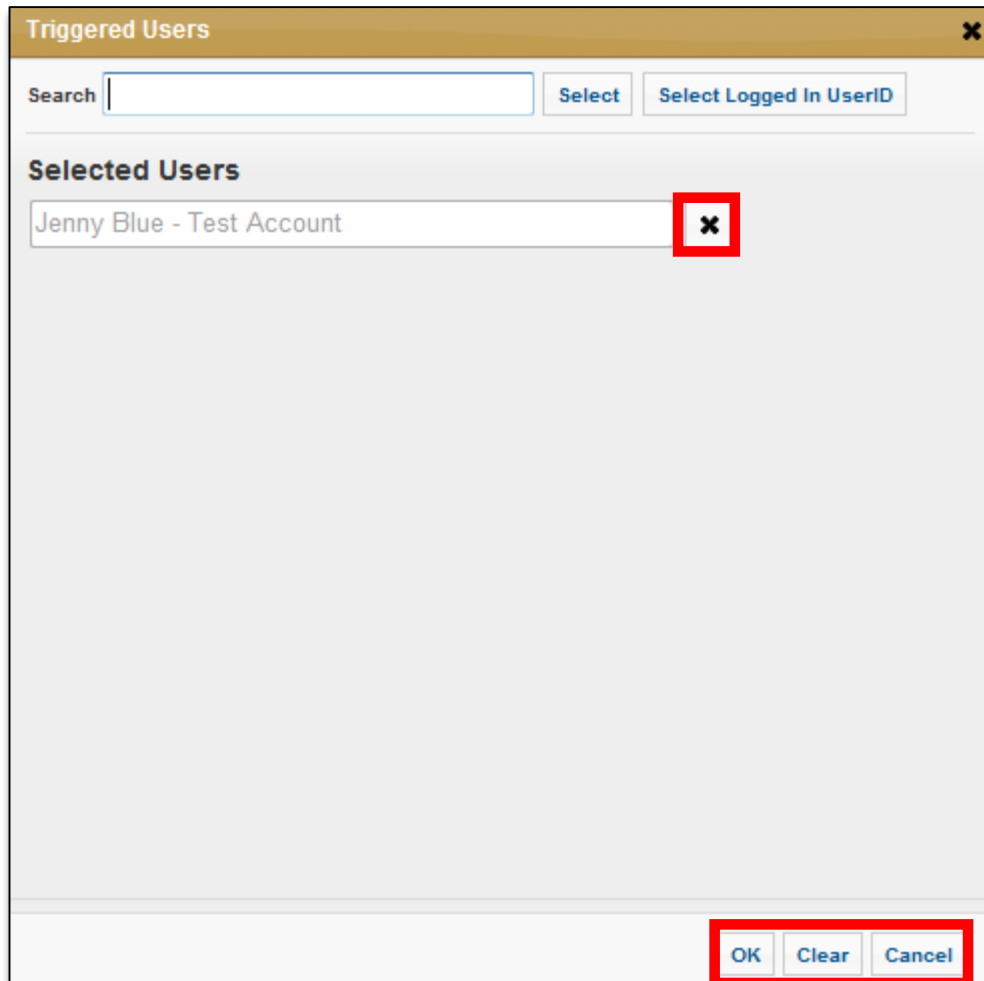
A pop-up window will appear. Type the user's name into the search field. Choose their name from the potential matches.



After choosing the desired user's name, click **select**.



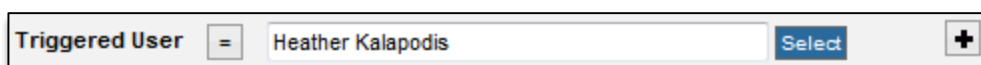
The user's name will now appear in the list of selected users. Repeat as needed for any additional users. If a user has been added in error, click the **x** to the right of the user's name to remove them. Click **ok** to save the changes, **clear** to remove the selected users, or **cancel** to return to the previous window without saving the changes.



You may also choose to use the **select logged in user** function. The **select logged in userID** option will allow the queue to be personalized to any user who views the queue. When this option is chosen, any user who views the queue will see only accounts for which they are the triggered user.



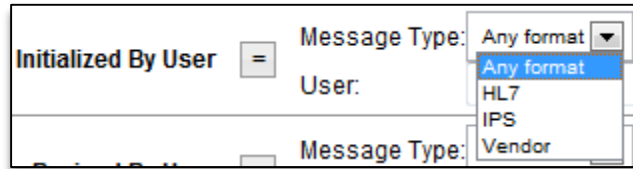
After selected the desired users and clicking **ok**, the triggered users window will close. Click **+** to add the filter to the queue.



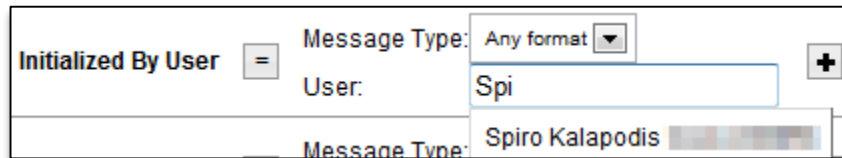
### Initialized By User

The **initialized by user** filter can be used to create a queue of accounts where the selected user was the first user to run a transaction on that account. This is similar to **triggered user**, and would pull back the same accounts as a **triggered user** queue if the message type was set to “any format”. However, **initialized by user** allows you the additional flexibility to narrow down the accounts by message type.

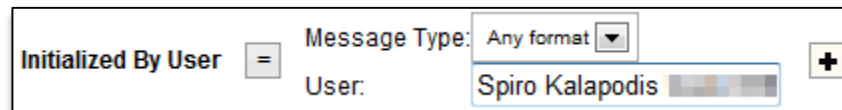
Select the message type from the dropdown menu.



Search for the desired user. As you type, results will be displayed.



Select the user, then click **+** to add the filter to the queue.



*Note: This filter is controlled by a permission and may not be enabled at all facilities.*

### Revised By User

Use this filter to create a queue of accounts that have been **revised by** a specified user. Select the message type from the dropdown menu. Search for the desired user and select the user from the returned results. Click **+** to add the filter to the queue.

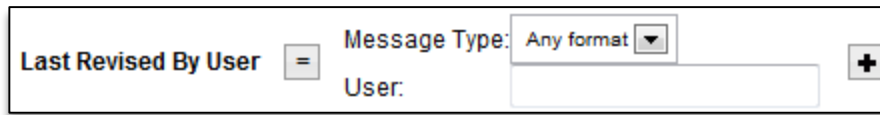


*Note: This filter is controlled by a permission and may not be enabled at all facilities.*



### Last Revised By User

Use this filter to create a queue of accounts that have been **last revised by** a specified user. Only accounts where the specified user was the most recent user to revise the account will be listed in a queue that uses this filter.



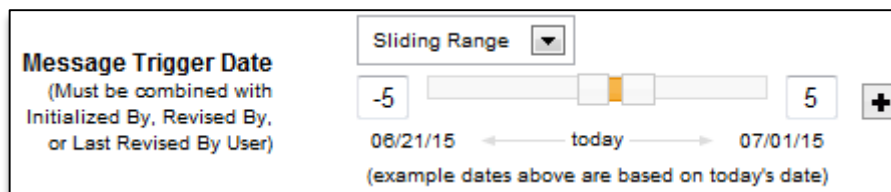
Select the message type from the dropdown menu. Search for the desired user and select the user from the returned results. Click **+** to add the filter to the queue

*Note: This filter is controlled by a permission and may not be enabled at all facilities.*

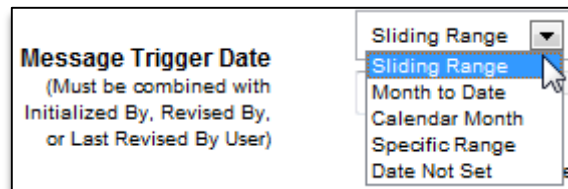
### Message Trigger Date

This filter must be combined with the **initialized by**, **revised by**, or **last revised by user** filter. Use this filter to narrow the accounts listed in a queue based on the date that the message was triggered.

Use the sliding scale to select a date.



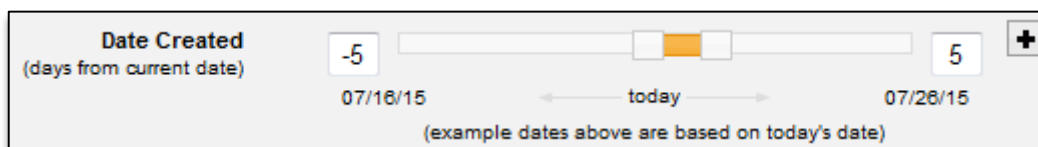
Alternatively, users may select a different date option from the dropdown menu.



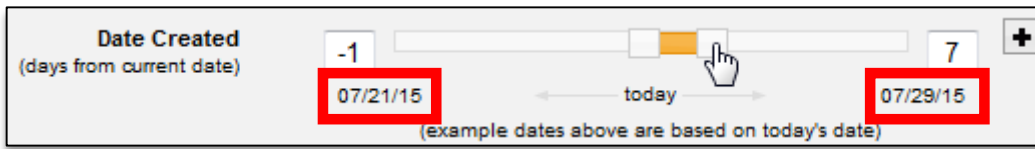
*Note: This filter is controlled by a permission and may not be enabled at all facilities.*

### Date Created

Use the **date created** filter to build a queue based on the **date the account was created**. By default, the slider will display 5 days before and after the current date, but you may use the slider to define a custom date range. Click **+** to add the filter to the queue.

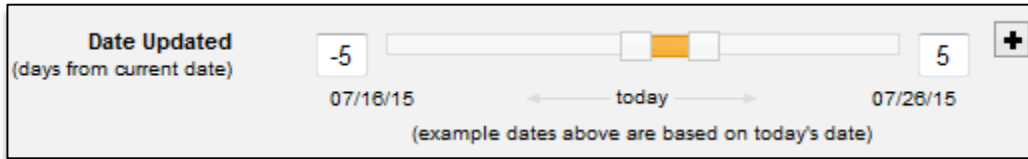


As you use your mouse to move the slider, the example dates will change to show you what dates the queue would encompass based on today's date.



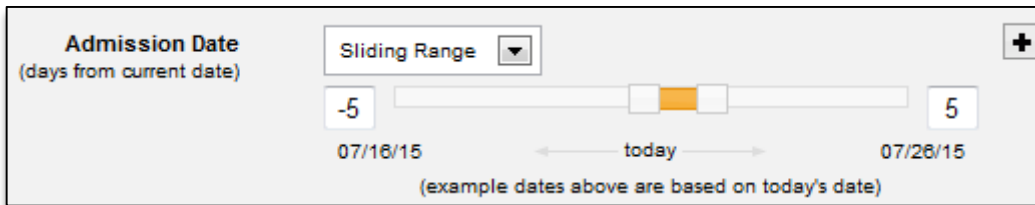
### Date Updated

Use the **date updated** filter to build a queue based on the **date the last message was received**.

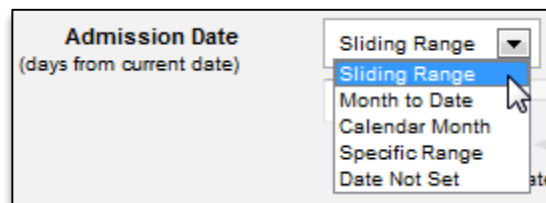


### Admission Date

To filter patients based on their **admission date**, move the slider to select a date range. By default, the slider will display a range of 5 days before and after the current date, but you may use the slider to define a different sliding range. Click **+** to add the criteria to the queue.

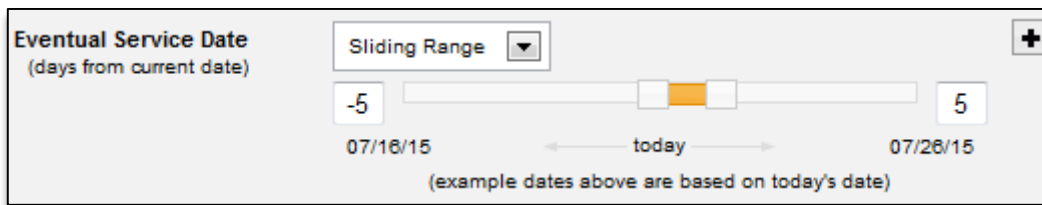


Alternatively, you may use the dropdown menu to specify **month to date**, a chosen **calendar month**, a **specific range** of dates, or **date not set**.

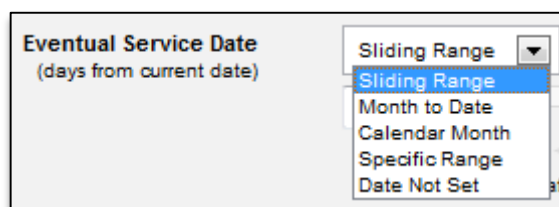


## Eventual Service Date

The **eventual date of service** filter is Batch-specific and is not widely used. By default, the slider will display 5 days before and after the current date, but you may use the slider to define a different sliding range. Click **+** to add the filter to the queue.

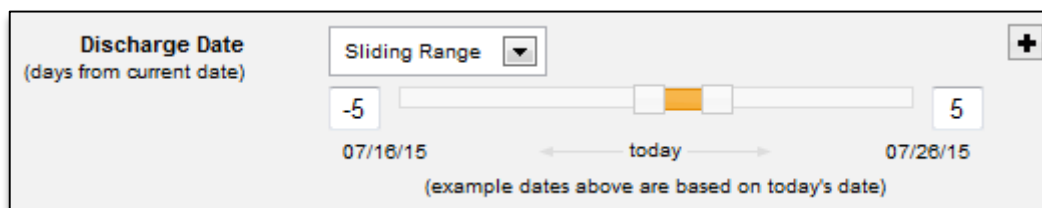


Alternatively, you may use the dropdown menu to specify **month to date**, a chosen **calendar month**, a **specific range** of dates, or **date not set**.

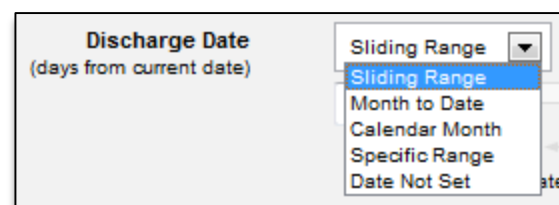


## Discharge Date

To filter patients based on their **discharge date**, move the slider to select a date range. By default, the slider will display a range of 5 days before and after the current date, but you may use the slider to define a different sliding range. Users may also use the dropdown menu to specify a desired date. Click **+** to add the criteria to the queue.



Alternatively, you may use the dropdown menu to specify **month to date**, a chosen **calendar month**, a **specific range** of dates, or **date not set**.



## PatientTrack

The **PatientTrack** filter category is comprised of all alerts relating to Passport's PatientTrack product. Please note that this tab is controlled by a permission, and therefore not all users will see this tab.

OVR

PT

AL

DEM

COV

Arrival State = Arrived +

Arrival Status = Select a Department +

Global

Arrival Department = +

### Arrival State

This filter can be used to create a queue based on patients in the “arrived” or “registered” states in PatientTrack. Select a state from the dropdown menu, then click **+** to add the criteria to the queue.

Arrival State = Arrived +

Arrived

Registered

Arrival Status = Select a Department +

### Arrival Status

The **arrival status** filter can be used to filter patients based on their arrival status in PatientTrack. Users can specify the department they'd like to include in the queue by selecting a department from the dropdown menu. This filter can be used in conjunction with the **arrival state** filter. For example, if a user wishes to build a queue for the radiology department to show patients that are en route, they would set the **arrival state** filter to “arrived”, then set the **arrival status** to “en route” and the department to “radiology”. Click **+** to add the filter to the queue.

Arrival Status = Select a Department +

Global

### Arrival Department

The **arrival department** filter can be used by facilities to create a queue based on the arrival department in PatientTrack. Place your cursor in the field to see the available department for your facility. Place a checkmark next to the desired department(s), then click **close**. Click **+** to add the criteria to the queue.

Arrival Department = +

close

11914

11916

## Alerts

The **alerts (AL)** filter category is comprised of all alerts relating to Registration Quality Assurance (RQA) alerts.

OVR	Alert Resolved = <input type="radio"/> Yes <input type="radio"/> No	+
PT	Has Unresolved RQA Alerts = <input type="radio"/> Yes <input type="radio"/> No	+
<b>AL</b>	Alert Status = <input type="text"/>	+
DEM	Alert Type = Actionable <input type="button" value="v"/>	+
COV	Alerts = <input type="text"/> <input type="button" value="Select"/>	+
NOA	Alert User ID = Logged In UserID <input type="button" value="Select"/>	+
AUTH	EVN Alert UserID = <input type="text"/>	+
EST	Alert Created Date = Last 72 Hours <input type="button" value="v"/>	+
USER		

### Alert Resolved

For best results, use the **alert status** filter instead of the **alert resolved** filter. Use of this filter in conjunction with **alert status** is not recommended.

**Alert resolved** is used to create queues that show accounts with either resolved or unresolved RQA alerts, depending on the selection of **yes** or **no**. Alert Resolved will return all accounts that have any resolved alerts when **yes** and any unresolved alerts when set to **no**.

Alert Resolved = <input type="radio"/> Yes <input type="radio"/> No
---

### Has Unresolved RQA Alerts

For best results, use the **alert status** filter instead of the **has unresolved RQA alerts** filter. Use of this filter in conjunction with **alert status** is not recommended.

This filter will return all accounts that have any unresolved alerts when set to **yes**. If it is set to **no**, it will return all accounts that have all of their alerts resolved.

Has Unresolved RQA Alerts = <input type="radio"/> Yes <input type="radio"/> No	+
--	---

### Alert Status

Place a check mark next to the alert status(es) that should be a part of the queue. The available statuses may vary by facility, but by default, most will see statuses of **assign to user** and **resolved**.

**Assign to User** – Alerts in this state have not been addressed by the user.

**Resolved** – Indicates an alert that has already been resolved by a user, either through system or manual resolve.

Alert Status	=		+
Alert Resolved	=	close	+
Has Unresolved RQA Alerts	=	<input type="checkbox"/> ASSIGN TO USER <input type="checkbox"/> RESOLVED	+

After making a selection, click **close**. Click **+** to add the criteria to the queue profile.

### Alert Type

This filter may be used to define the type of alerts that should be included in the queue – accounts with **actionable** alerts, **informational** alerts, **any alerts**, or **no alerts**. This filter is a convenient option for those wishing to create a queue that encompasses all alerts of a certain type, such as an All Actionable Alerts queue. With **alert type**, if your facility adds a new actionable alert, you would not need to make any changes to the queue in order for accounts with that new alert to be included in the queue. On the other hand, a queue built the **alerts** filter *would* need to be modified to include the new alert.

Make a selection from the dropdown menu, then click **+** to add the criteria to the queue profile.

Alert Type	=		
Alerts	=	Actionable Informational Any Alert No Alerts	
Alert User ID	=		

### Alerts

The **alerts** filter can be used to create queues that only contain accounts where the selected alert(s) have fired. To choose the desired alerts for the queue, click **select**.

Alerts	=		Select	+
--------	---	--	--------	---

A window will display, listing the alerts that users may choose from. Users may click the **include** radio button next to the desired alert(s), or choose **select all actionable**, **select all informational**, **select all**, or **deselect all**.

For help with sorting and searching the alert list, click **help**.

Alerts

Select All Actionable Select All Informational Select All Deselect All  Show Subscribed Only Help

Alerts found: 502

	CODE	ALERT DESCRIPTION	PRODUCT SOURCE	TYPE	INCLUDE	EXCLUDE
	1	Third Party Payer	Coverage		<input type="radio"/>	<input type="radio"/>
	2	Non Passport Payer	Coverage		<input type="radio"/>	<input type="radio"/>
	3	ABN Required	Coverage		<input type="radio"/>	<input type="radio"/>
	4	Medicare Secondary Payer	Coverage		<input type="radio"/>	<input type="radio"/>
	5	This transaction is a Rerun	Coverage		<input type="radio"/>	<input type="radio"/>
	6	Discrepancies found in response data	Coverage		<input type="radio"/>	<input type="radio"/>
	7	Passport Medicare HMO	Coverage		<input checked="" type="radio"/>	<input type="radio"/>
	8	Inactive Coverage	Coverage		<input type="radio"/>	<input type="radio"/>
	9	Non Passport Medicare HMO	Coverage		<input checked="" type="radio"/>	<input type="radio"/>
	10	Passport Added	Coverage		<input type="radio"/>	<input type="radio"/>
	12	Invalid/Missing Search Criteria	Coverage		<input type="radio"/>	<input type="radio"/>
	13	Non Passport Medicaid MCO	Coverage		<input checked="" type="radio"/>	<input type="radio"/>
	14	Delayed Response	Coverage		<input type="radio"/>	<input type="radio"/>

Add To Queue Cancel

**Select All Actionable** – Users should choose this option if they would like the queue to include all actionable alerts. This is commonly used in creating a My Unresolved Alerts queue for **Registration Quality Assurance (RQA)** users.

**Select All Informational** – Choose this option to include all informational alerts in the queue.

**Select All** – Users may choose this option if they would like the queue to contain all accounts with alerts, regardless of whether they are actionable or informational.

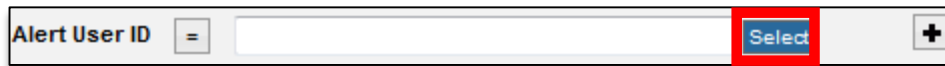
**Deselect All** – To deselect any alerts that you may have previously chosen, select this option.

Once all desired alerts have been selected, click **add to queue**. Alternatively, click **cancel** to return to the previous screen without selecting any alerts.

After clicking **add to queue**, the criteria will be added to the queue profile on the right side of the page.

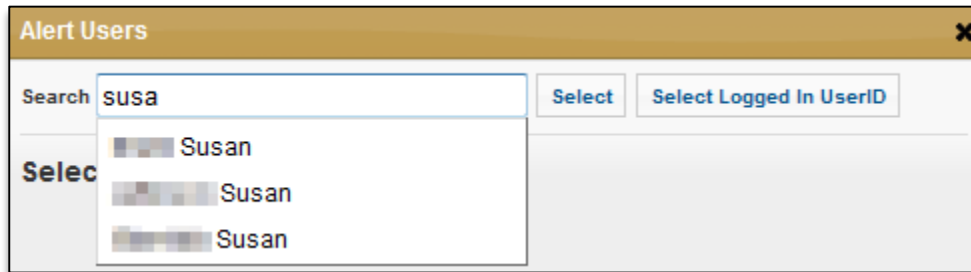
## Alert User ID

Click **select** to choose the user(s) that triggered the alert.



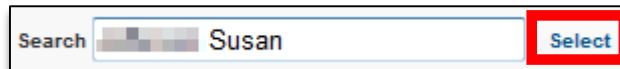
The image shows a horizontal input field labeled "Alert User ID" with an equals sign icon on the left and a plus sign icon on the right. A blue "Select" button is highlighted with a red border.

A new window will open. Begin typing a name into the search field to choose a specific user.



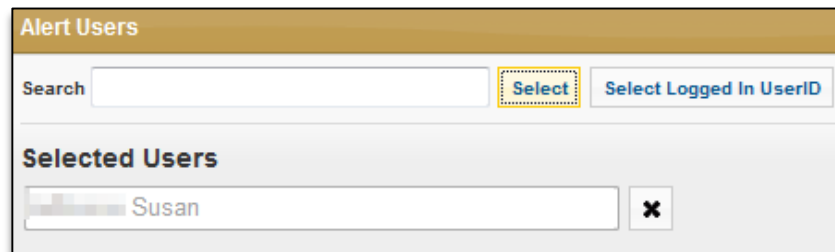
The image shows a window titled "Alert Users" with a search field containing "susa". Below the search field, a dropdown menu displays three entries, each with a blurred profile picture and the name "Susan". To the right of the search field are two buttons: "Select" and "Select Logged In UserID".

Click on the desired user's name, then click **select** to add the user.



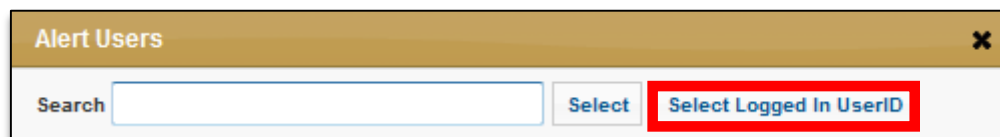
The image shows the "Alert Users" window with "Susan" entered in the search field. The "Select" button is highlighted with a red border.

The user's name will be added to the list of selected users. Repeat as needed to add additional users. A common use for this filter is to create a queue for a department manager or supervisor that allows them to monitor the alerts of their employees.



The image shows the "Alert Users" window with the search field empty. Below the search field, a section titled "Selected Users" contains a list item with a blurred profile picture and the name "Susan", followed by a close button (X).

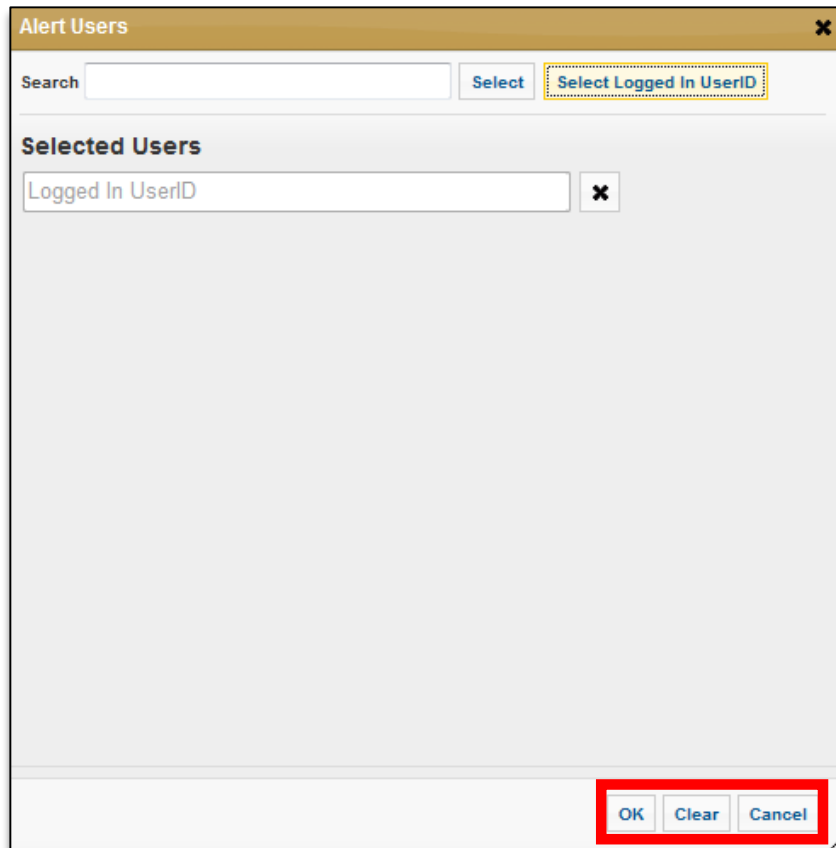
The **select logged in userID** option will allow the queue to be personalized to any user who views the queue. This option is often used in creating the **My Unresolved Alerts** queue for RQA. Any user who views a queue with the **select logged in userID** option would see only their alerts.



The image shows the "Alert Users" window with the search field empty. The "Select Logged In UserID" button is highlighted with a red border.



After making all selections, click **ok** to proceed. Alternatively, users may click **clear** to remove all currently selected users, or **cancel** to return to the previous screen without saving the changes.



Click **+** to add the filter to the queue profile.



### EVN Alert User ID

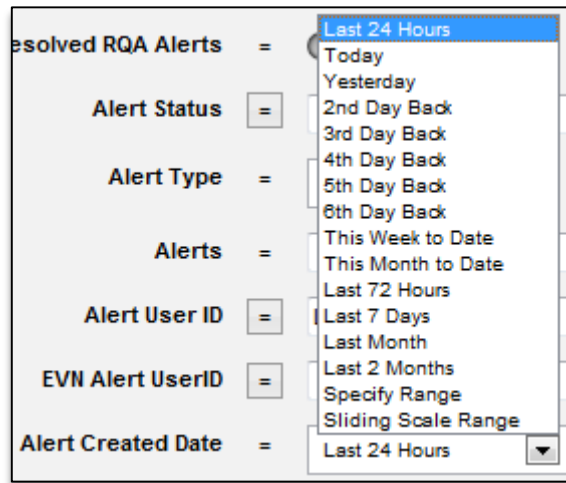
*For best results, use the **Alert User ID** filter described above instead of **EVN Alert User ID**.*

The **EVN Alert User ID** filter is based off of the EVN.5 segment in the HL7 message. This can be used to create a filter based on a user's mapping, which is generally (though not always) their HIS or PMS username. To use this filter, type the user's mapping in the field and click **+** to add the criteria to the queue.



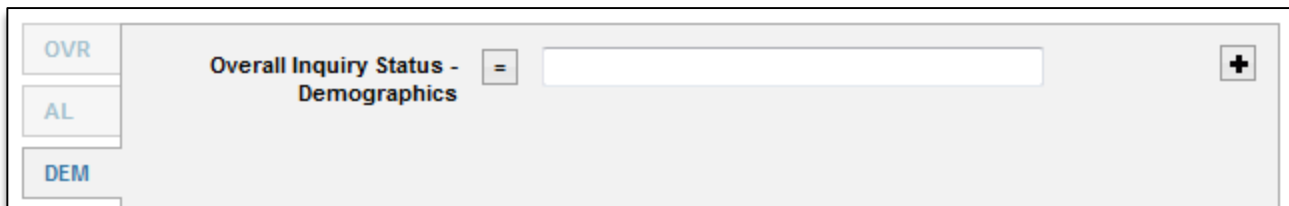
### Alert Created Date

User the **Alert Created Date** filter to limit the queue's scope to alerts only from certain dates.



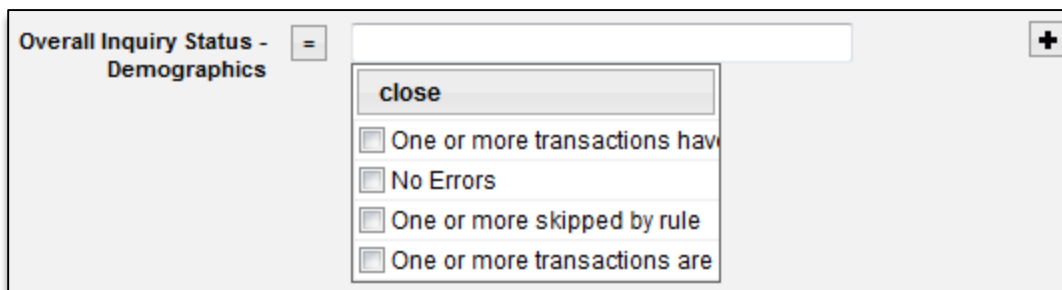
### Demographics

The **demographics (DEM)** tab is comprised of all filters related to the demographics chevron in eCare NEXT.



### Overall Inquiry Status – Demographics

Facilities utilizing Passport's **Address Verification** may use this filter to create a queue based on the overall coverage demographic status. The options for this filter are **one or more transactions have errors**, **no errors**, **one or more skipped by rule**, and **one of more transactions are not complete**. Place a checkmark next to the desired status(es), then click **close**. Click **+** to add the filter to the queue.



## Coverage

The **coverage (COV)** tab is comprised of all filters related to the coverage chevron, which houses eligibility within eCare NEXT.

Overall Inquiry Status - Coverage =  +

Coverage Status =  +

Processing Status =  +

Primary Insurance Name =  +

Primary Insurance Client Mnemonic =  +

Primary Policy Name =  +

Primary Policy Number =  +

Insurance Count =  +

Insurance Index =  +

Insurance Name =  +  
(filter by any insurance name)

Insurance Client Mnemonic =  +  
(filter by any client mnemonic)

Client Plan ID =  +

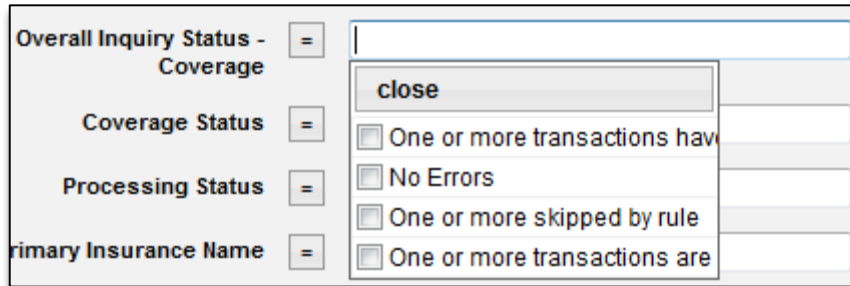
Coverage Run By User =  Select +

Date Run =  -5  5 +  
(days from current date)

07/17/15 ← today → 07/27/15  
(example dates above are based on today's date)

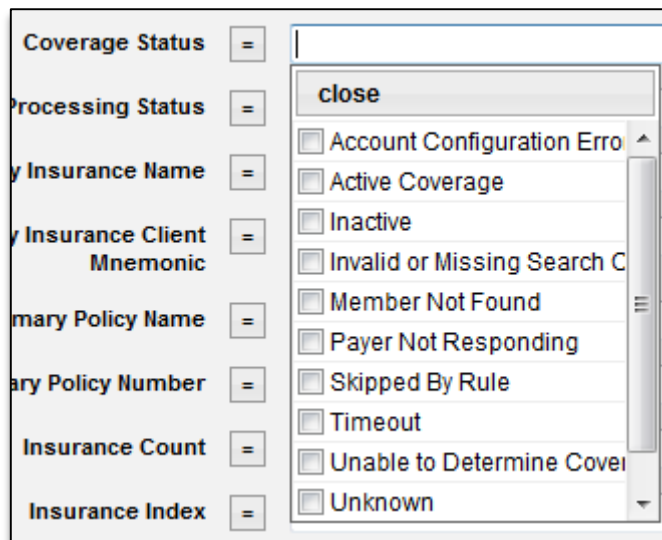
### Overall Inquiry Status – Coverage

Use this filter to create a queue based on the overall coverage inquiry status. The options for this filter are **one or more transactions have errors**, **no errors**, **one or more skipped by rule**, and **one of more transactions are not complete**. Place a checkmark next to the desired status(es), then click **close**. Click **+** to add the filter to the queue.



### Coverage Status

This filter may be used to create a queue based on the status of coverage. For example, a queue of all inactive insurances could be built by checking the **inactive** option. After making a selection, click **close**, then click **+** to add the criteria to the queue.



## Processing Status

Use this filter to create a queue based on the transaction **processing status**. Place a checkmark next to the desired status(es), then click **close**. Click **+** to add the filter to the queue.

Processing Status	=		+
Primary Insurance Name	=		+
Primary Insurance Client Mnemonic	=		+
Primary Policy Name	=		+
Primary Policy Number	=		+
Insurance Count	=		+
Insurance Index	=		+

close

- Request Pending
- At Payer
- Response Received
- Scripting Pending
- Scripting Complete
- Scripting Error
- Finished
- Skipped by Rule
- User Modified Done

## Primary Insurance Name

Use this filter to create a queue based on the **insurance name** in the **primary** position of the registration. Please note that this filter looks at the insurance in the first or primary slot in the registration, so if the insurances are entered incorrectly in the registration, it may not truly be that patient's primary insurance. Place a checkmark next to the desired insurance(s), then click **close**. Click **+** to add the filter to the queue.

Please note that this filter is intended to capture only insurances in the primary position in the registration system. To create a queue based on insurance name in any position, see the **Insurance Name** filter.

Primary Insurance Name	=		+
Primary Insurance Client Mnemonic	=		+
Primary Policy Name	=		+
Primary Policy Number	=		+
Insurance Count	=		+
Insurance Index	=		+
Insurance Name (filter by any insurance name)	=		+
Insurance Client Mnemonic	=		+

close

- AETNA PRIMARY
- BC COMMERCIAL 12D OP
- BC SHBP MCRMAN
- BCBSMA
- DENTAQUEST
- EVERCARE RI
- GEORGIA
- HEALTHCHOICE PPO SEL
- Hpn-Mcaid
- HUMANA GOLD PLUS

### Primary Insurance Client Mnemonic

Use this filter to create a queue based on a patient's primary mnemonic or carrier code in the registration system. Place a checkmark next to the desired insurance(s), then click **close**. Click **+** to add the filter to the queue.

Please note that this filter is intended to capture only insurances in the primary position in the registration system. To create a queue based on insurance name in any position, see the **Insurance Client Mnemonic** filter.

Primary Insurance Client Mnemonic	=	<input type="text"/>	+
Primary Policy Name	=	<input type="text"/>	+
Primary Policy Number	=	<input type="text"/>	+
Insurance Count	=	<input type="text"/>	+
Insurance Index	=	<input type="text"/>	+

close

- 00000
- 01004
- 100008
- 7502
- 946
- 9999

### Primary Policy Name

Use this filter to create a queue based on a patient's **primary policy name**. This filter can be used to quickly capture patients that have any type of plan through the selected payer(s) listed as their primary coverage in the registration system.

Primary Policy Name	=	<input type="text"/>	+
Primary Policy Number	=	<input type="text"/>	+
Insurance Count	=	<input type="text"/>	+
Insurance Index	=	<input type="text"/>	+
Insurance Name	=	<input type="text"/>	+

close

- Aetna
- Alabama Medicaid
- Blue Cross Blue Shield of I
- Blue Cross of California
- CIGNA

### Primary Policy Number

Use this filter to create a queue based on a patient's primary policy number.

Primary Policy Number	=	<input type="text"/>	+
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### Insurance Count

Use this filter to create a queue based on the number of carrier codes or mnemonics on a patient's account in the registration system. For example, entering an insurance count equal to "3" would list all patients with 3 carrier codes or mnemonics in the registration system.

Insurance Count	=	<input type="text"/>	+
-----------------	---	----------------------	---

### Insurance Index

Use this filter to create a queue with criteria regarding the patient’s coordination of benefits. Used alone, the filter will simply show all patients with insurances in that position. For instance, choosing “quaternary” would show any patients who have an insurance in the 4<sup>th</sup> position in the registration system. This filter is best used in conjunction with other filters – for example, showing all patients with Medicare as secondary.

Insurance Index	=		+
Insurance Name (ny insurance name)	=	close	+
Client Mnemonic (y client mnemonic)	=	<input type="checkbox"/> Primary	+
Client Plan ID	=	<input type="checkbox"/> Secondary	+
		<input type="checkbox"/> Tertiary	+
		<input type="checkbox"/> Quaternary	+

### Insurance Name

Use this filter to create a queue based on a patient’s insurance. This filter will show all patients with the selected insurance name(s) in any position.

To create a queue that only displays patients with the selected insurance as primary, use the **Primary Policy** filter.

Insurance Name (filter by any insurance name)	=		+
Insurance Client Mnemonic (filter by any client mnemonic)	=	close	+
Client Plan ID	=	<input type="checkbox"/> Aetna	+
Coverage Run By User	=	<input type="checkbox"/> Alabama Medicaid	+
		<input type="checkbox"/> Alaska Medicaid	+
		<input type="checkbox"/> CIGNA	+
		<input type="checkbox"/> Florida Medicaid	+

### Insurance Client Mnemonic

Use this filter to create a queue based on a patient's insurance mnemonic or carrier code within the registration system. This filter will show all patients with the selected insurance mnemonics in any position.

To create a queue that only displays patients with the selected mnemonic in the primary position, use the **Primary Insurance Client Mnemonic** filter.

The screenshot shows a filter configuration window for 'Insurance Client Mnemonic'. It includes a search field, a list of mnemonics with checkboxes, and a 'Select' button. The date '07/27/15' is displayed at the bottom right.

### Client Plan ID

Use this filter to build a queue based on the **client plan ID** from the HL7.

The screenshot shows a simple filter configuration for 'Client Plan ID' with a search field and a plus sign button.

### Coverage Run by User

Click **select** to choose the desired **coverage run by user(s)**. The coverage run by user is the last user who caused eligibility to run on the account. Click **select** to choose the user(s).

The screenshot shows the 'Coverage Run by User' filter configuration. The 'Select' button is highlighted with a red box.

A pop-up window will appear. Type the user's name into the search field. Choose their name from the potential matches.

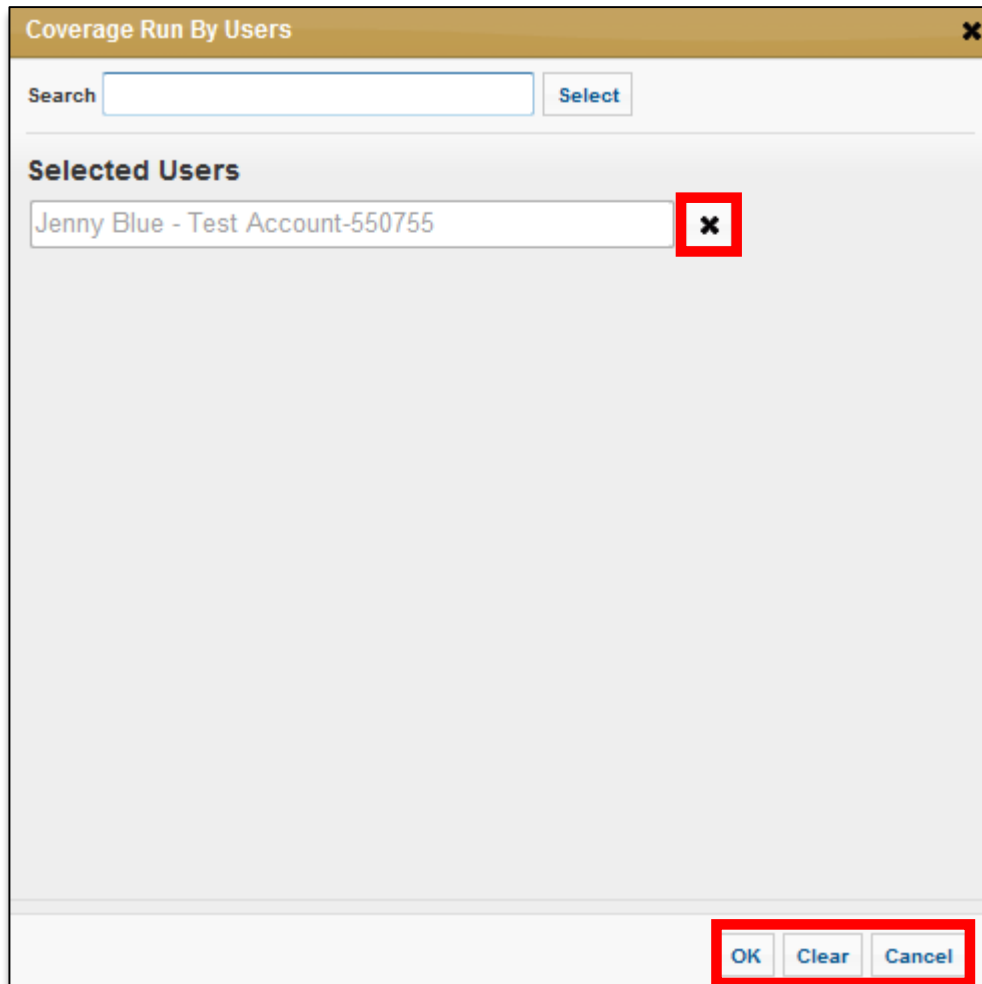
The screenshot shows a pop-up window titled 'Coverage Run By Users'. It has a search field with 'Jenny' entered, a dropdown menu showing 'Jenny Blue - Test Account', and a 'Select' button.

After choosing the desired user's name, click **select**.

The screenshot shows the 'Coverage Run by User' filter configuration. The search field now contains 'Jenny Blue - Test Account' and the 'Select' button is highlighted with a red box.



The user's name will now appear in the list of selected users. Repeat as needed for any additional users. If a user has been added in error, click the **x** to the right of the user's name to remove them. Click **ok** to save the changes, **clear** to remove the selected users, or **cancel** to return to the previous window without saving the changes.



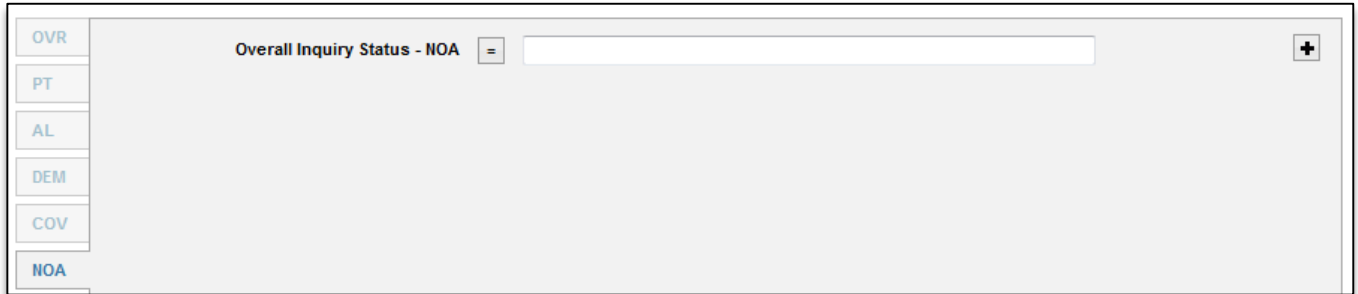
### Date Run

Use the **date run** slider to build a queue based on the **date the transaction was run**. By default, the slider will display 5 days before and after the current date, but you may use the slider to define a custom date range. Click **+** to add the filter to the queue.



## Notice of Admission

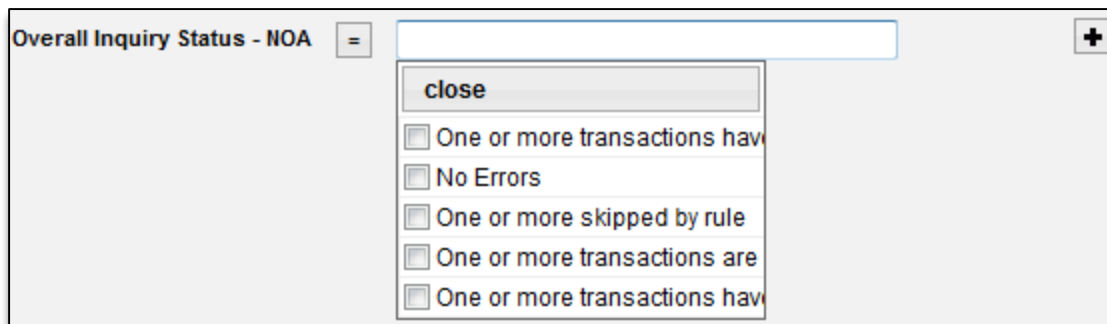
The **Notice of Admission (NOA)** filter category is comprised of all alerts relating to Passport's Notice of Admission product.



The screenshot shows a filter configuration window. On the left, there is a vertical list of filter categories: OVR, PT, AL, DEM, COV, and NOA. The 'NOA' category is selected and highlighted in blue. The main area of the window displays the text 'Overall Inquiry Status - NOA' followed by an equals sign and an empty text input field. A plus sign icon is located in the top right corner of the main area.

## Overall Inquiry Status – NOA

Facilities using Passport's Notice of Admission may use this filter to create a queue based on the overall Notice of Admission inquiry status. The options for this filter are **one or more transactions have errors, no errors, one or more skipped by rule, one of more transactions are not complete,** and **one or more transactions have a status of modified.** Place a checkmark next to the desired status(es), then click **close**. Click **+** to add the filter to the queue.



The screenshot shows the 'Overall Inquiry Status - NOA' filter configuration window with a dropdown menu open. The dropdown menu contains the following options, each with an unchecked checkbox: 'close', 'One or more transactions hav', 'No Errors', 'One or more skipped by rule', 'One or more transactions are', and 'One or more transactions hav'. The 'close' option is highlighted in grey. The background shows the filter name and an equals sign, with the plus sign icon visible in the top right corner.

## Authorizations

The **Authorizations (AUTH)** filter category is comprised of all alerts relating to Passport's Auth product, **OrderRite**, in the eCare NEXT environment. Please note that the filters in this section pertain only to facilities using OrderRite.

The screenshot shows the AUTH filter configuration interface. On the left is a vertical sidebar with buttons for OVR, AL, DEM, COV, NOA, AUTH (highlighted), EST, and USER. The main area contains several filter rows, each with a label, an equals sign, a value field, and a plus sign button:

- Authorization Payer Mnemonic**: Value field is empty.
- Authorization Workflow Status**: Value field is empty.
- Authorization Status**: Value field is empty.
- Insurance Authorization Information**: Value field is empty.
- Authorization User Action Required**: Value is  Yes  No.
- Authorization Date of Service**: Value is a range from -5 to 5. Below the range are dates 07/17/15, today, and 07/27/15. A note says "(example dates above are based on today's date)".
- Authorization Next Review Date**: Value is a range from -5 to 5. Below the range are dates 07/17/15, today, and 07/27/15. A note says "(example dates above are based on today's date)".

### Authorization Payer Mnemonic

Use this filter to create a queue based on auths for a select payer or payers. Place a checkmark next to the desired payer mnemonic(s), then click **close**. Click **+** to add the filter to the queue.

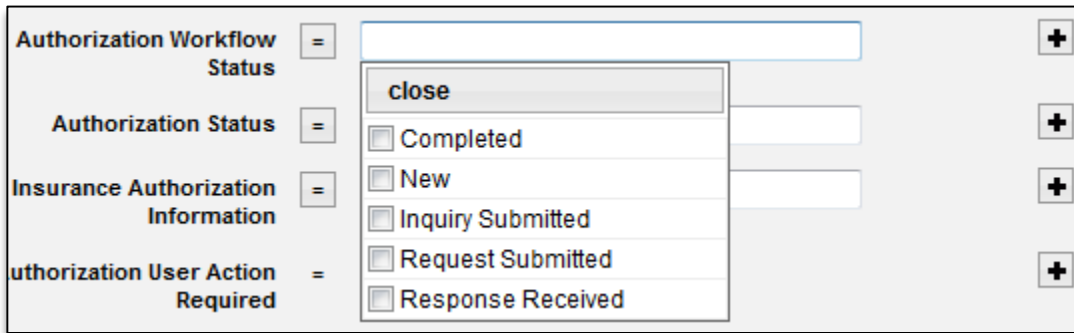
The screenshot shows the "Authorization Payer Mnemonic" filter configuration. The value field is empty, and a dropdown menu is open, showing the following options with checkboxes:

- PHC
- PHC1
- PHC3
- PUHC

The "close" button is also visible at the top of the dropdown menu. The plus sign button to the right of the filter is visible.

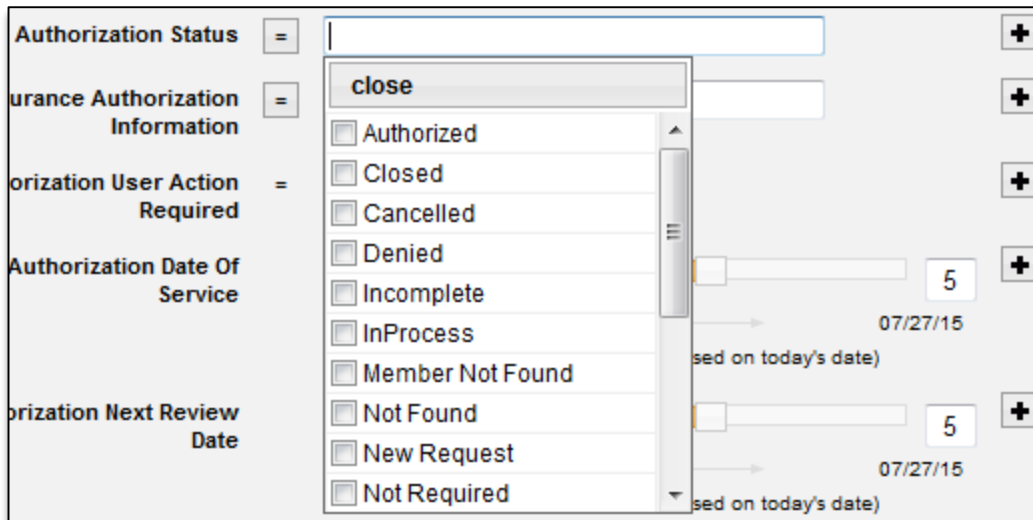
### Authorization Workflow Status

Use this filter to sort accounts based on their **authorization workflow status**. Place a checkmark next to the desired status(es), then click **close**. Click **+** to add the filter to the queue.



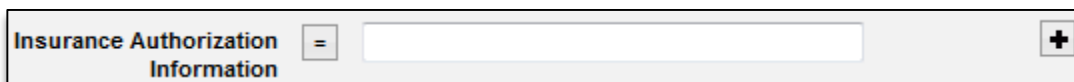
### Authorization Status

Use this filter to create a queue based on **auth status**. Place a checkmark next to the desired status(es), then click **close**. Click **+** to add the filter to the queue.



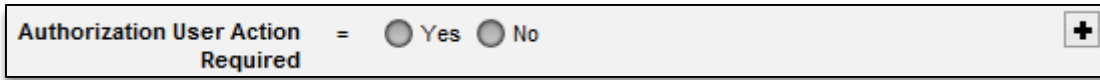
### Insurance Authorization Information

Use this filter to create a queue based on the **authorization number field**. Enter the desired value in the field, then click **+** to add the filter to the queue.



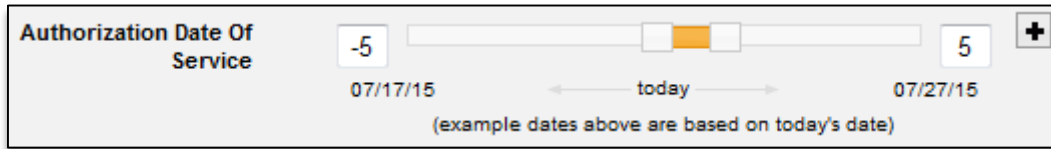
### Authorization User Action Required

Select “yes” to create a queue that shows encounters where there is more than one authorization associated with it. Select “no” to create a queue that shows encounters that only have one associated authorization. Click **+** to add the filter to the queue.



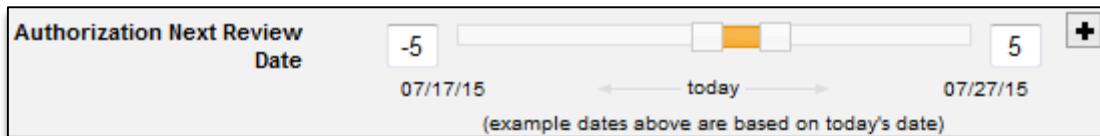
### Authorization Date of Service

Use this filter to create a queue based on the **authorization date of service**. By default, the slider will display 5 days before and after the current date, but you may use the slider to define a different sliding range. Click **+** to add the filter to the queue.



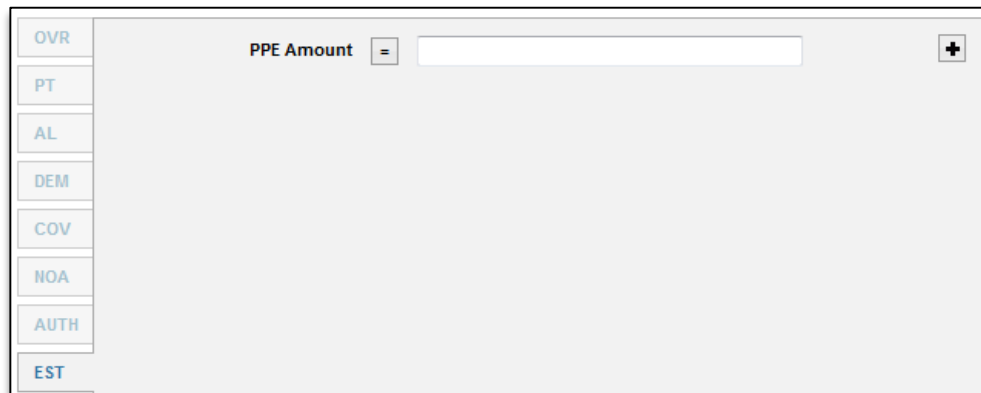
### Authorization Next Review Date

Use the **authorization next review date** slider to filter the queue based on the “next review date” field in OrderRite. By default, the slider will display 5 days before and after the current date, but you may use the slider to define a different sliding range. Click **+** to add the filter to the queue.



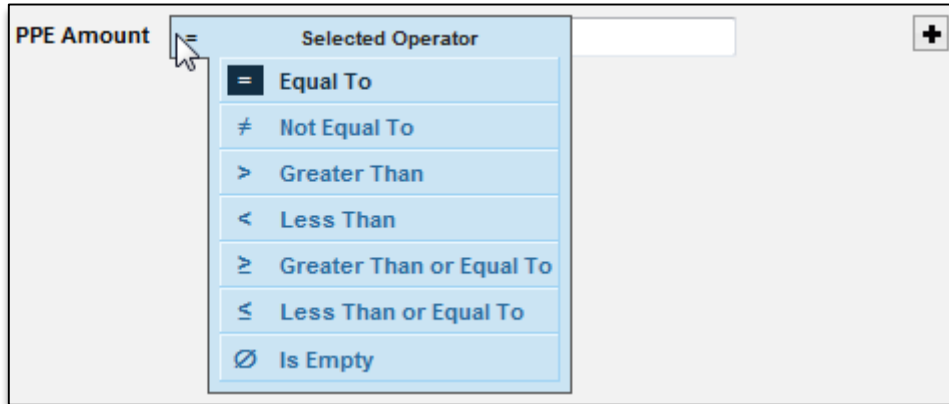
### Estimate

The **Estimate (EST)** filter category is comprised of all alerts relating to Passport’s **Patient Payment Estimate (PPE)** product in the eCare NEXT environment. Please note that the filters in this section pertain only to facilities using PPE.



## PPE Amount

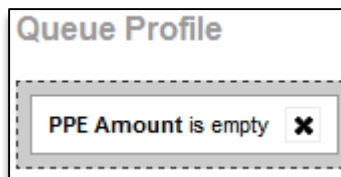
Users at facilities with PPE may create queues based on estimate amounts. Users may choose to create queues for patients with estimates greater than a specified dollar amount by changing the operator to **greater than or equal to**, or patients who have not had estimates run by changing the operator to **is empty**.



Please note that if choosing an operator of **is empty**, the user should not enter a value in the free text field and instead leave the field blank. Click **+** to add the filter to the queue.



The resulting queue profile would appear as shown below.



## User Defined

Any fields custom-created for an individual facility or trading partner will be listed under the **User Defined (USER)** tab. These filters will vary by facility.

The screenshot shows a vertical sidebar on the left with tabs labeled OVR, PT, AL, DEM, COV, NOA, AUTH, EST, and USER. The USER tab is selected. The main area displays three filter rows: 'Test Field 1 = [input field] +', 'Test Field 2 = [input field] +', and 'Test Field 10 = [input field] +'. Each row has an equals sign, a text input field, and a plus sign button.

## Queue Profile

The **Queue Profile** displays all of the filters that make up the queue.

The screenshot shows the 'Available Filters' section on the left with various filter options like 'Is Done', 'WorkCenter Status', 'Patient Last Name', and 'Patient Date Of Birth'. On the right, the 'Queue Profile' section is highlighted with a red border. It contains a large dashed rectangular box for the profile, 'Sort Queue by' (set to 'Date Updated'), 'Sort Order' (set to 'Descending'), and two checkboxes: 'Ignore Transaction Ownership' and 'Open After Save'. A 'Save Queue' button is at the bottom right.

Before any filters have been added, the queue profile will appear empty, as shown below:

This screenshot shows the 'Queue Profile' section with an empty dashed rectangular box. Below it are the 'Sort Queue by' dropdown (set to 'Date Updated'), the 'Sort Order' dropdown (set to 'Descending'), and the two checkboxes: 'Ignore Transaction Ownership' and 'Open After Save'.

As filters are added to the queue, they will be displayed under the queue profile.

Queue Profile

Alert Type = Actionable ✕ AND

Alert Created Date Last 3 Days ✕ AND

Alert User ID = Logged In UserID ✕

Sorting options, transaction ownership controls, and the **save** button are located below the queue profile.

Sort Queue by Date Updated ▼ Sort Order Descending ▼

Ignore Transaction Ownership

Open After Save

Save Queue

**Sort Queue By** – Use this dropdown to define if the queue should sort by **date updated** or **service date**. “Date updated” is selected by default.

Sort Queue by Date Updated ▼

Date Updated

Service Date

**Sort Order** – Use this dropdown to choose if the queue should sort in **descending** or **ascending** order. “Descending” is selected by default.

Sort Order Descending ▼

Descending

Ascending

### Ignore Transaction Ownership

Select this checkbox to **ignore transaction ownership**. For example, many end users only have access to view their own transactions in the default work queue. To give such a user access to view all transactions (not just their own) in a specific queue, click **ignore transaction ownership**.

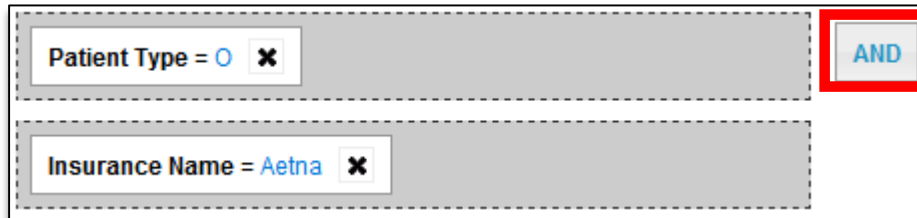


**Open After Save** – Check this box to allow the queue to open immediately after it has been saved. Keep in mind that it can take a moment for the logic to begin filtering out the new queue. If the queue is empty or is showing patients that should not be listed in the queue, refresh the page.

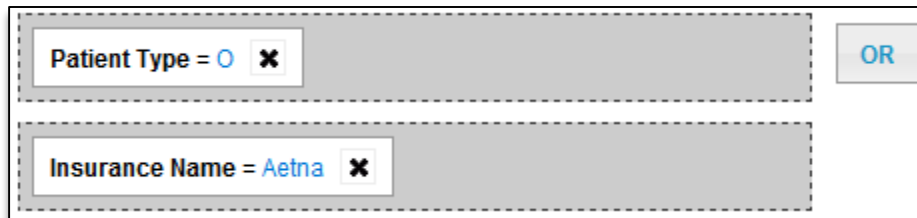
**Save** – Click here to save all changes to the queue.

### And/Or Operators

When multiple filters are part of the same queue, they will be separated in the queue profile by **and/or** logic. When each filter is added for an unlike term, “and” will be the default. This example shows a queue that would show all patients with a type of “O” who have Aetna as their insurance.



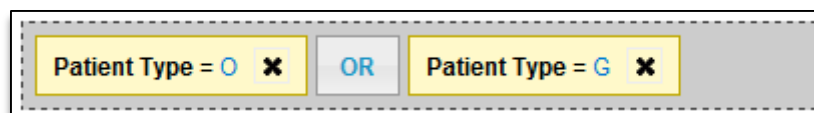
Clicking **AND** would change this to an “or” statement – in this scenario, any patients who are a patient type of “O” or any patients who have Aetna as their insurance. In this case, patients would only have to meet the criteria of one of the filters, not both, to appear in the queue. Clicking on the **OR** button would cause it to revert to the “and” operator.



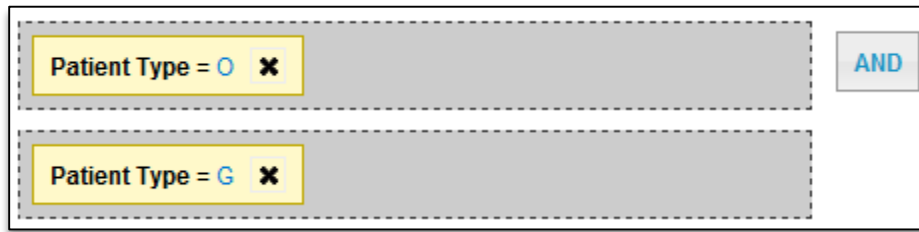
### Like Terms

While unlike terms are separated into their own boxes in the queue profile, like terms should be grouped together in the same box. For this example, let’s say that I wanted to create a queue of patients with a patient type of “O” or “G”.

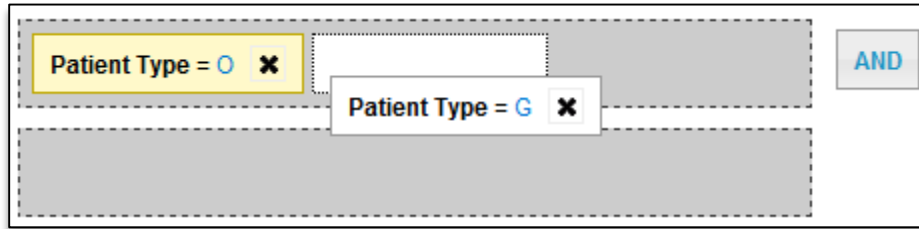
**Correct:** The queue below shows two like terms (patient type) in the same grey box. This queue would display any patients who had a patient type of either O or G. If both patient types were added to the queue profile at the same time, they will display in the proper format.



**Incorrect:** Adding the filters separately has created two different grey boxes. As it is currently written, this queue would only show patients with a patient type of both O and G. This would result in a queue with no patients, as one patient cannot have both patient types.



This can happen if the patient types are added at separate times. To fix this, click on one of the terms and drag it into the other box:



Users may also need to click **AND** to change it to **OR**:



The finished queue profile in its proper format is below:



## Example Queues

This queues in the section are intended to provide examples of completed queues for reference.

### Delayed Response Queue

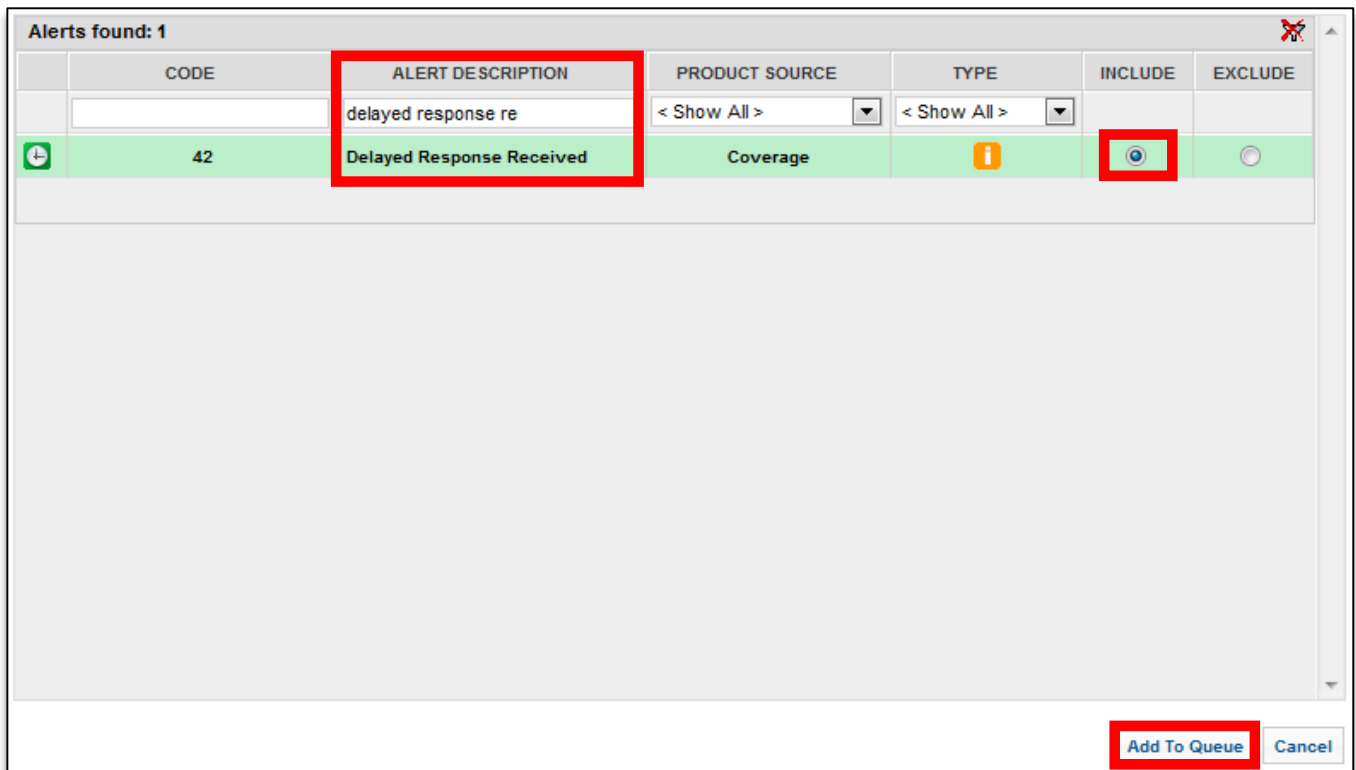
At times, Passport is unable to provide immediate eligibility for certain payers due to payer downtime, slowness, and intermittent processing. Passport will continue to check for eligibility for the 24 hours or until a response is received, whichever comes first. Building a delayed response queue allows users to follow up on responses that were unavailable at the time of registration.

Start with the **alerts** filter under the **alerts** tab. Click **select** to begin.



Alerts =  Select +

Click **include** for the **delayed response received** alert. To easily access this alert, you may search for it in the free text field under **alert description**. Click **add to queue** to continue.

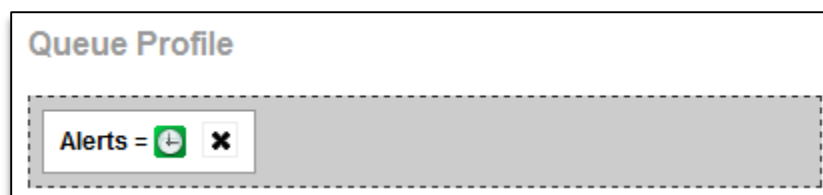


Alerts found: 1

CODE	ALERT DESCRIPTION	PRODUCT SOURCE	TYPE	INCLUDE	EXCLUDE
42	Delayed Response Received	Coverage	i	<input checked="" type="radio"/>	<input type="radio"/>

Add To Queue Cancel

The queue profile will appear as follows:



Queue Profile

Alerts = + x

Next, set a limit on how far back the queue will display. This will vary by user preference, but for this example, the queue will be limited to transactions run within the last 72 hours.

Choose the **date run** filter located under the **coverage** tab. Use the slider to adjust the desired number of days. Click **+** to add the filter to the queue profile.

**Date Run**  
(days from current date)

-3 0 +

05/30/14 ← today → 06/02/14

(example dates above are based on today's date)

The queue profile will now appear as shown below:

Alerts = [icon] x

Date Run: Today -3 x

AND

For facilities that are utilizing the “done” status option in the work queue, users may choose to add the filter **is done = no**, located under the **overview** tab. With this filter, any accounts with delayed responses received that have been marked as “done” will not be listed in the queue to avoid duplicating efforts. Click **no**, then click **+** to add the filter to the queue profile.

Is Done =  Yes  No +

If the purpose of the queue is for the user to be able view all received delayed responses, click **ignore transaction ownership**. Click **save queue** when done. The finished queue should look like the example below:

Alerts = [icon] x

Date Run: Today -3 x

Is NOT Done x

Sort Queue by Date Updated

Sort Order by Descending

Ignore Transaction Ownership

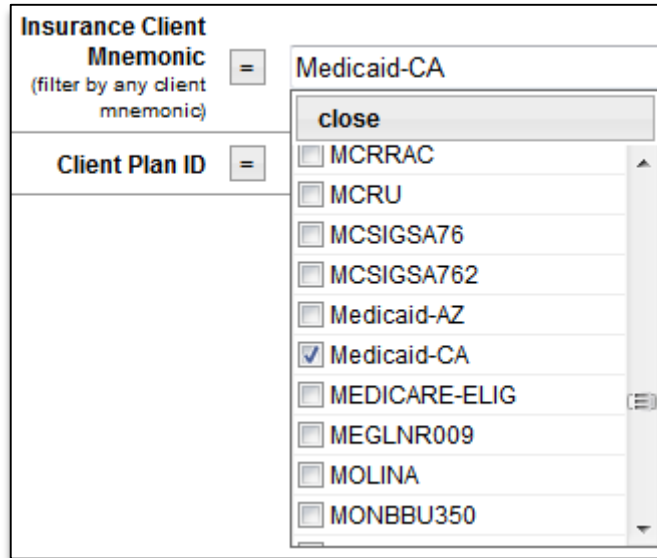
Open After Save

Save Queue

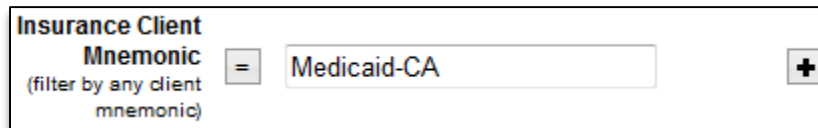
## Self Pay Queue

A common rule within eCare NEXT is that Medicaid is run on all self pay patients. A robust self pay queue can therefore be built using filters of Medicaid responses with a status of inactive, invalid or missing search criteria, and unable to determine coverage.

Use the **insurance client mnemonic** filter located under the **coverage** tab. Choose the mnemonic for your state's regular Medicaid plan and click **close**.

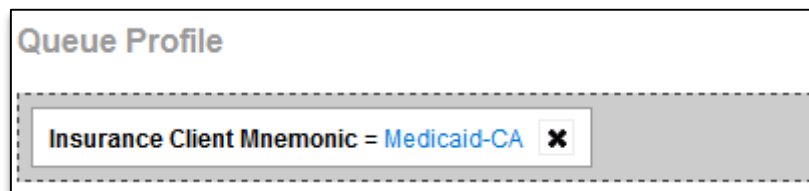


The screenshot shows a dialog box for selecting an insurance client mnemonic. On the left, there are two filter fields: "Insurance Client Mnemonic (filter by any client mnemonic)" and "Client Plan ID". The "Insurance Client Mnemonic" field is set to "Medicaid-CA". A dropdown menu is open, showing a list of options with checkboxes. The "close" button is highlighted at the top of the dropdown. The list includes: MCRAC, MCRU, MCSIGSA76, MCSIGSA762, Medicaid-AZ, Medicaid-CA (checked), MEDICARE-ELIG, MEGLNR009, MOLINA, and MONBBU350.



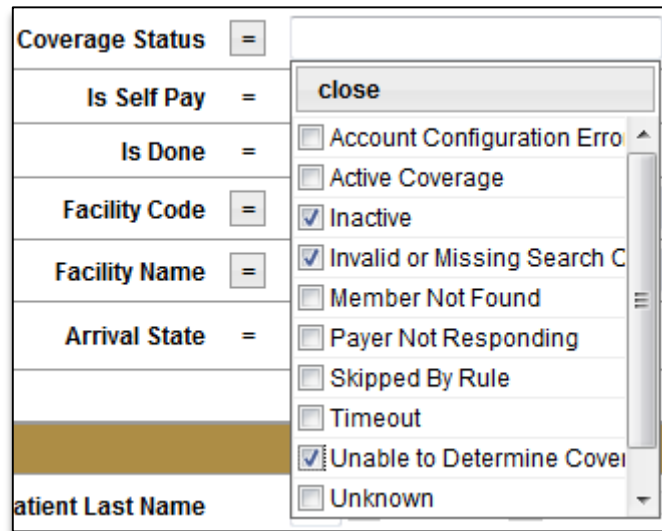
The screenshot shows the "Insurance Client Mnemonic" filter field in a simplified view. The text "Insurance Client Mnemonic (filter by any client mnemonic)" is on the left. To its right is an equals sign, a text input field containing "Medicaid-CA", and a plus sign button.

So far, the queue profile will display as shown below:

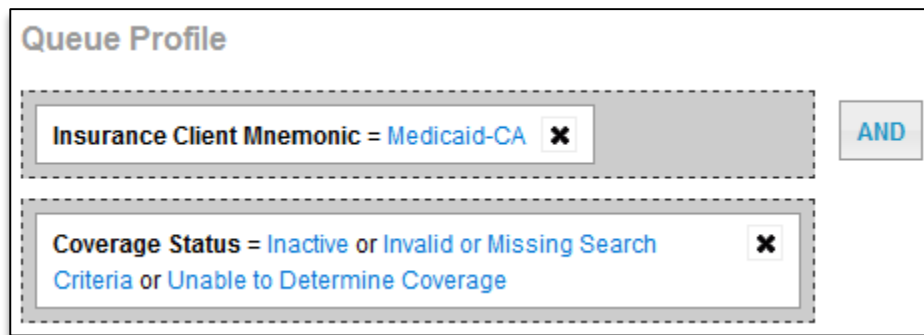


The screenshot shows a "Queue Profile" box. Inside the box, there is a dashed-line border containing a filter rule: "Insurance Client Mnemonic = Medicaid-CA" followed by a close button (an 'x' in a square).

Next, use the **coverage status** filter located under the **coverage** tab. Choose **inactive**, **invalid or missing search criteria**, and **unable to determine coverage**, then click close.

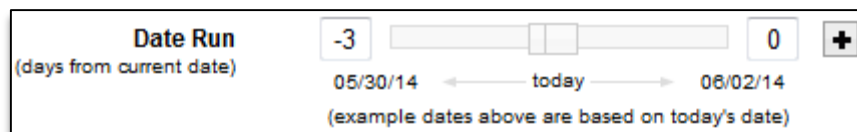


At this point, the queue profile will appear as follows:



Next, set a limit on how far back the queue will display. This will vary by user preference, but for this example, the queue will be limited to transactions run within the last 3 days.

Choose the **date run** filter located under the **coverage** tab. Use the slider to adjust the desired number of days. Click **+** to add the filter to the queue profile.



The queue profile will now appear as shown below:

Queue Profile

Insurance Client Mnemonic = Medicaid-CA ✕ AND

Coverage Status = Inactive or Invalid or Missing Search Criteria or Unable to Determine Coverage ✕ AND

Date Run: Today -3 ✕

For facilities that are utilizing the “done” status option in the work queue, users may choose to add the filter **is done = no**, located under the **overview** category. With this filter, any accounts with delayed responses received that have been marked as “done” will not be listed in the queue to avoid duplicating efforts. Click **no**, then click **+** to add the filter to the queue profile.

Is Done =  Yes  No +

If the purpose of the queue is for the user to be able view all received delayed responses, remember to click **ignore transaction ownership**. Click **save queue** when done. The finished queue should look like the example below:

Insurance Client Mnemonic = Medicaid-CA ✕ AND

Coverage Status = Inactive or Invalid or Missing Search Criteria or Unable to Determine Coverage ✕ AND

Date Run: Today -3 ✕ AND

Is NOT Done ✕

Sort Queue by Date Updated

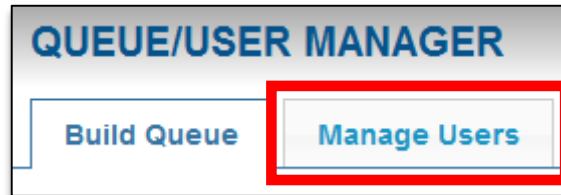
Sort Order by Descending

Ignore Transaction Ownership

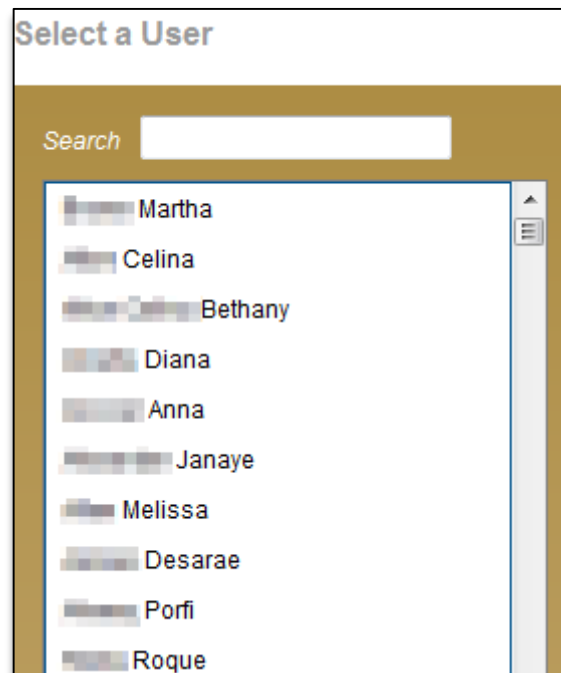
Open After Save **Save Queue**

## User Manager

The User Manager allows users to quickly view, add, and remove the queues to which a selected user has access. To begin, click the **Manage Users** tab.



Select a user from the menu, either by using the search function or selecting the user's name from the list.





The selected user's permissions and assigned work queues will be listed, as well as any work queues available to be assigned to the user.

**Brown Martha**

Search

- Martha
- Celina
- Bethany
- Diana
- Anna
- Janaye
- Melissa
- Desarae
- Porfi
- Roque
- HERMENGILDA
- MAUREEN

**Permissions** Save User

Allow Queue Manager Access  Allow User Manager Access

**Available Work Queues**

- All Accounts Past 60 days
- Coverage Discover Added Insurance
- L46 and D51
- My First Queue
- Test queue

**Assigned Work Queues**

- Default Queue (Client level profile.)
- My Unresolved Alerts (Client level profile.)
- Test Queue

### Permissions

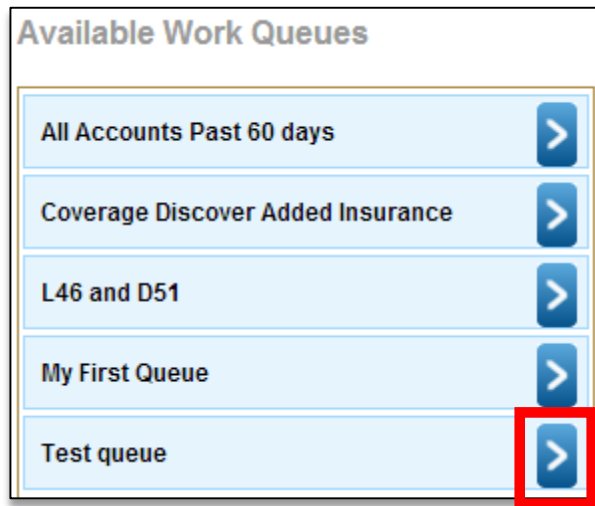
Check the applicable box(es) to give the selected user access to the Queue Manager and/or User Manager. Keep in mind that users with access to these functions will be able to make queue changes that impact the entire trading partner. Therefore, access should generally be limited to management and client administrators only.

**Permissions** Save User

Allow Queue Manager Access  Allow User Manager Access

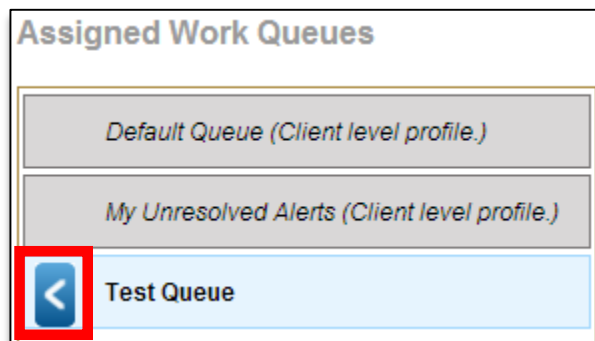
### Available Work Queues

This column lists all work queues available. Click on the arrow next to the desired queue name to assign to the selected user. Click **save user** to save your changes.



### Assigned Work Queues

This column lists all work queues that have already been assigned to the selected user. Click the arrow next to a queue name to remove a queue. Queues in grey may not be removed.



### Customer Support

For additional inquiries, please contact Passport Customer Support. Customer support is available 24/7.

**E-mail:** [customer.support@passporthealth.com](mailto:customer.support@passporthealth.com)

**Phone:** (866) 854-6796

**Passport Product Dashboard:** <http://www.passportproductdashboard.com>

**Passport Payer Status:** <http://www.passportsystemstatus.com>