Timeline

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Customize Your Timeline

The Timeline section shows current and past due items that need attention. The types of tasks shown in th Timeline are initially based on the user's permissions but can be customized by the user. Each task include: the ability to "drill through" to another area of the application in order to take additional actions.

Follow the steps below to customize your timeline.

1. Select **Home** > **Welcome**.
2. Click **Customize** (top right corner).
3. Select the "**Build your Welcome page**" radio button.
4. Click the **Timeline** tab.

> Selecting a user's function/duties (Reception/ Front Desk, Scheduling, Coding, Billing Collection, Insurance Payment Posting, Patient Payment Posting, Management) will automatically include all the timeline options associated with it.

Make your timeline selections:

> If the user cannot perform the action based on his/her permissions, no data will be shown for that action on the timeline.

1. **Reception/Front Desk**: Selecting this option will add the **Appointments that need attention** and **Today's appointments** shortcuts to your timeline.
    1. **Appointments that need attention**: Check this option to be able to see any appointments that need attention (appointments that haven't been confirmed, with incomplete patient records, without up-to-date insurance, etc.).
    2. **Today's appointments**: Check this option to be able to quickly see the scheduled patient appointments for the day.
    3. **Appointments without Estimates**: Check this option to be able to quickly see the scheduled patient appointments that do not have any patient estimates.
    4. **Appointments with Estimate Balance**: Check this option to be able to quickly see the scheduled patient appointments that have a patient estimate balance.

5. **Appointments with unfilled intake forms**: Check this option to be able to quickly see the scheduled patient appointments that have any patient intake forms that have been sent out but not yet filled out by the patient.

2. **Scheduling**: Selecting this option will add the **Waiting list: Next 7 Days** and **Appointments that need eligibility checks** shortcuts to your timeline.

    1. **Waiting list: Next 7 Days**: Check this option to be able to quickly identify patients that are in the appointment waiting list within the next 7 days.

    2. **Appointments that need eligibility checks**: Check this option to be able to quickly identify scheduled appointments where the patient needs eligibility checked.

3. **Coding**: Selecting this option will add the **Interface errors**, **Incomplete Claims**, **Claims waiting for review**, and **Visits without claims** shortcuts to your timeline.

    1. **Interface errors**: Check this option to be able to quickly check any interface messages with errors.

    2. **Incomplete Claims**: Check this option to be able to quickly identify and fix any incomplete claim

    3. **Claims waiting for review**: Check this option to be able to quickly find claims that are in the charge status of "**waiting for review.**"

    4. **Visits without claims**: Check this option to be able to quickly identify appointments that don't have any charges yet.

    5. **Appointments with unapplied intake forms**: Check this option to be able to quickly see the scheduled patient appointments that have any patient intake forms that have been completed b the patient, but not applied.

4. **Billing**: Selecting this option will add the **Claims rejections**, **Claim denials, Claims not billed, Claims without follow up dates**, and **Claims not acknowledged by payer** shortcuts to your timeline.

    1. **Claim rejections**: Check this option to be able to quickly find claim rejections.

    2. **Claim denials**: Check this option to be able to quickly find claim denials.

    3. **Claims without follow up dates**: Check this option to be able to quickly find claims that don't have a follow-up date.

    4. **Claims not billed**: Check this option to be able to quickly find claims that haven't been billed yet.

    5. **Claims not acknowledged by payer**: Check this option to be able to quickly find claims that have not been acknowledged as received by the payer.

    6. **Claims at status**: Check this option to be able to quickly find claims that are at a specific status. Select the Claim Status(es) from the list and you will see one entry in the timeline per selected status.

5. **Collection**: Selecting this option will add the **Statement errors**, **Patients who haven't received statements or FDNs recently,** and **Patients with a balance over 120 days old** shortcuts to your timeline.
    1. **Statement errors**: Check this option to be able to quickly find errored (automated) patient statements.
    2. **Patients who haven't received statements or FDNs recently**: Check this option to be able to quickly find patients with balances that haven't received statements recently.
    3. **Patients with a balance over 120 days old** Check this option to be able to quickly find patients with a balance due over 120 days old.
6. **Patient Payment Posting:** electing this option will add the **Available credits** shortcut to your timeline.
    1. **Available credits**: Check this option to be able to quickly find patients with available credits.
7. **Accounting:** Selecting this option will add the **Open Charges set to PAID**, **Invoice due**, **Run reports**, and **Hard close** shortcuts to your timeline.
    1. **Open Charges set to PAID:** Check this option to be able to quickly find patients with available credits
    2. **Invoice due:** Check this option to be able to quickly see when an invoice is due.
    3. **Run reports:** Check this option to be able to quickly find and run selected reports from the welcome screen.
    4. **Hard close:** Check this option to be able to quickly see the Hard Close data (monthly, quarterly, or yearly).
8. Click **Save**.

Using your Timeline

You can perform specific functions in each timeline option, from running and opening a report in real-time to quickly opening current and past due items.

1. Select **Home** > **Welcome**.

    > Depending on your timeline customization, the Timeline items will be available under one of the following options:
    >
    > - **Today**: Current reports and items that need your attention and are due today or this week.

- **Last Week**: Items or reports from the previous week that need your attention.
- **Last Month**: Items or reports from the previous month that need your attention.
- **Last Quarter**: Items from the previous quarter (90 days +) that need your attention.

2. Click on the Timeline Itemthat needs your attention.
3. Items will either drill through to a report or drill down to another section of the application in order t take the necessary actions.
4. The items in the timeline will show one of 3 possible statuses:
   - ✔ : This icon represents a timeline item with all records for that item up to date.
   - ☐ : This icon represents a timeline item that you have not opened yet.
   - ☑ : This icon represents a timeline item you have previously opened.
5. You can also click **Refresh** at the top of the timeline column to refresh the information displayed on the timeline.

Refresh Your Timeline

Follow the steps below to refresh the information displayed on the timeline.

1. Select **Home** > **Welcome**.
2. Locate the **Timeline** column on the welcome screen.
3. Click **Refresh** at the top of the timeline column.