Subject:	eTRUST - Flagged Accounts
Policy:	Operations ~ ARM
Applies To:	All HCFS Employees
Effective Date:	May 8, 2017
Revised Date:	September 12, 2017

HCFS

Performance Driven. Patient Oriented.

PURPOSE:

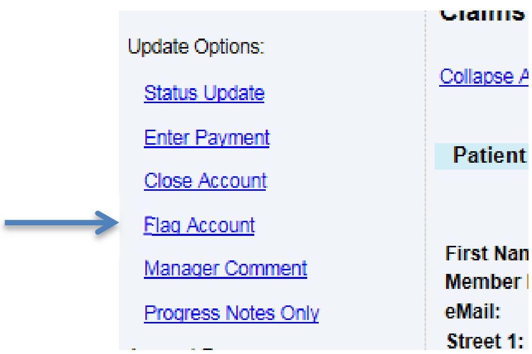
To document and clearly define the manager's process of marking accounts for immediate follow-up by the Billing and Enrollment Coordinators and Specialist (user).

EXPLANATION:

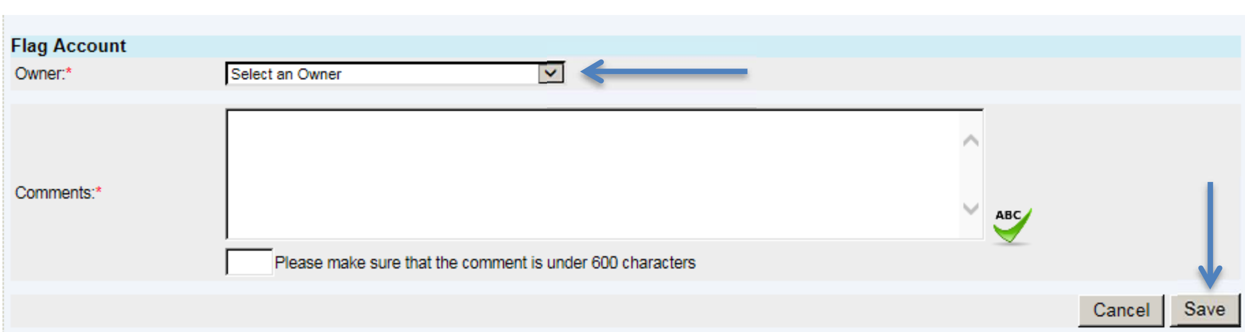
When a manager reviews an account and determines a message needs to be communicated to the user regarding either specific action needed on the account, the manager will "flag" the account placing it in the Flagged Accounts section of the eTRUST dashboard.

PROCESS:

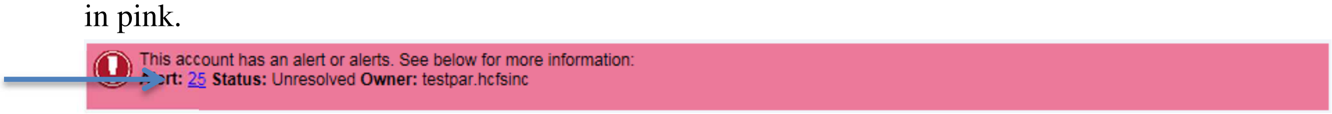
- The manager flags the account by selecting *Flag Account* on the left side of the *Account Detail* page of the account.



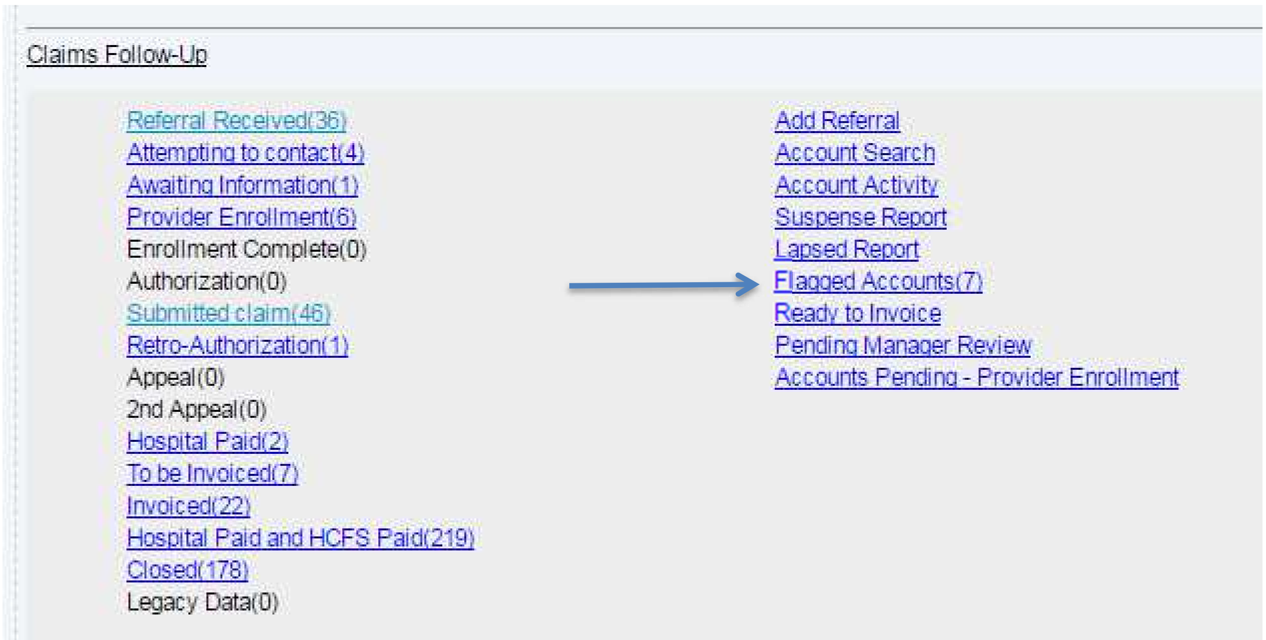
- The manager will select the flag owner from the drop down menu in the *Owner* box. The manager will add the message for the user stating specific instructions in the *Comment* pop up box then select *Save*.



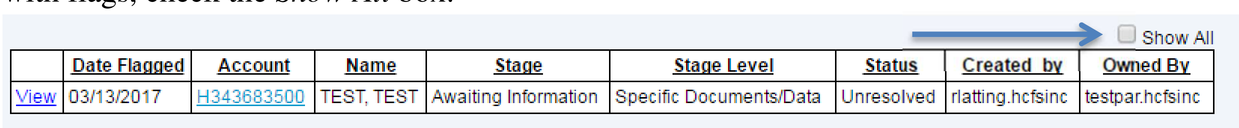
- A message stating the accounts worked status will appear at the top of the *Account Detail* page highlighted in pink.



- The account will then appear in the *Flagged Accounts* section. The user will check for and work all flagged accounts daily by selecting the *Flagged Accounts* link.

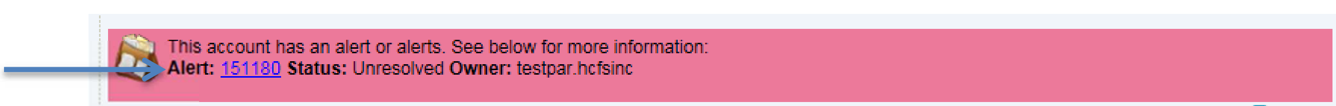


- The default view for a user will be to see the flags that they are the assigned owner. To see all accounts with flags, check the *Show All* box.

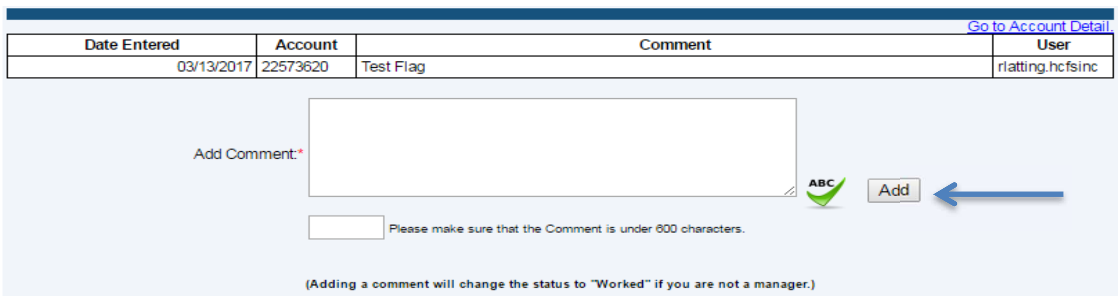

Show All

	Date Flagged	Account	Name	Stage	Stage Level	Status	Created by	Owned By
View	03/13/2017	H343683500	TEST, TEST	Awaiting Information	Specific Documents/Data	Unresolved	rlatting.hcfsinc	testpar.hcfsinc

- Once the account has been worked, the user will update the account by clicking on the blue "alert number" highlighted in pink.



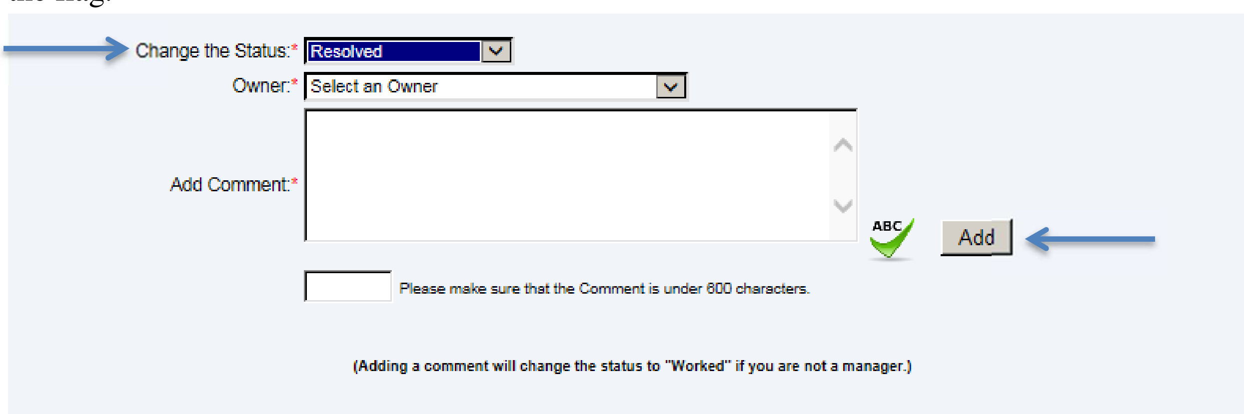
- The user will then add a note into the *Comment* section and select *Add*. The status of the account will automatically changed to *Worked* and be assigned back to the initiating manager.



The account must then be worked by the manager within 14 days of being placed in a Worked status.

- The manager will access the accounts assigned to them via above mentioned method.

- The manager will review the account, change the status to *Resolved* and select *Add*. This will close out the flag.



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