

PROCEDURE FOR FILTERING PB CHARGE REVIEW WORKQUEUES

Purpose: To give guidance on how to Set, Edit and Delete filters in charge review workqueues.

Department: PB Coding

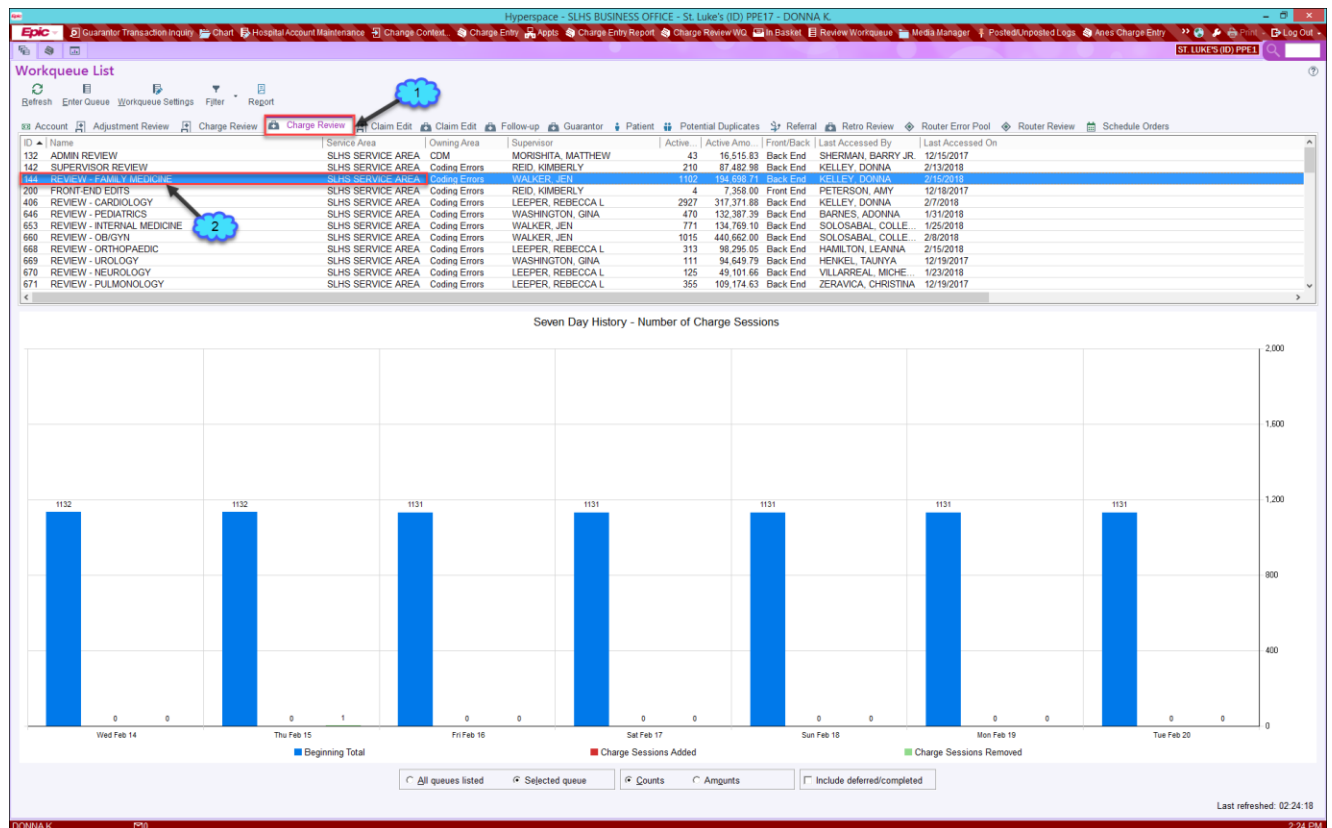
Additional Resources: [Logging in to EPIC](#)

- HOW TO [EDIT](#) A FILTER.
- HOW TO REMOVE A DEPARTMENT FROM THE [DEFAULT](#) DEPARTMENTS.
- HOW TO [DELETE](#) ALL THE DEFAULT DEPARTMENTS.

HOW TO SET A FILTER IN THE CHARGE REVIEW WORKQUEUES.

Login to Epic using the log in document under the Additional Resources above.

1. Click on the **PB Charge Review** tab (doctor bag).
2. Double click on the Specialty. (Scroll down if the specialty is not seen on the list.)



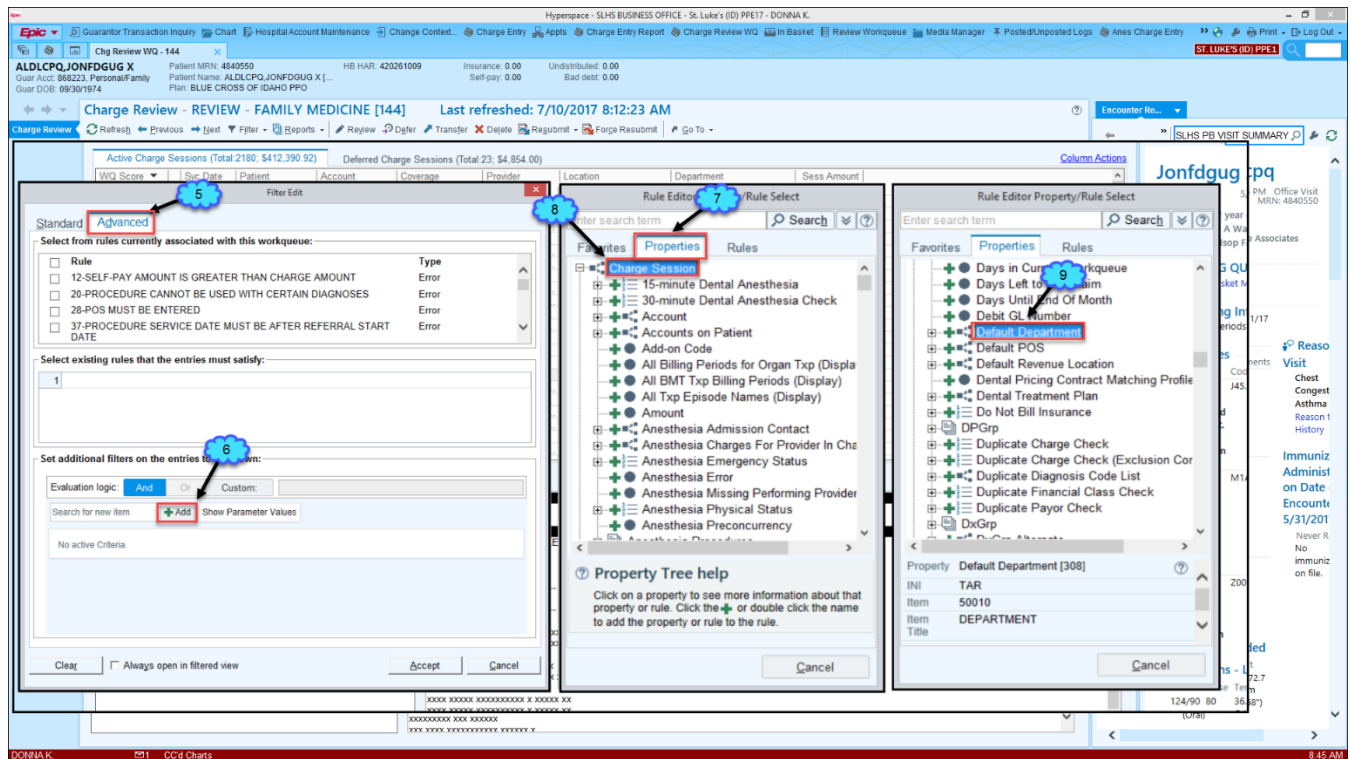
PROCEDURE FOR FILTERING PB CHARGE REVIEW WORKQUEUES

3. Click on drop down arrow next to **Filter**
4. Click on **Set/Edit Filter** (the Filter Edit screen opens)

The screenshot displays the Epic Charge Review interface. The main window shows a list of charge sessions with columns for WQ Score, Svc Date, Svc Code, Account, Coverage, Service Provider, Location, Department, CPT Code, Modifier List, Sess Amount, and MF. A dropdown menu is open next to the 'Filter' button, showing options like 'Apply Filter', 'Set/Edit Filter', 'Reports', 'Review', 'Dftr', 'Transfer', 'Delete', 'Regubmit', 'Forge Resubmit', and 'Go To'. The 'Set/Edit Filter' option is highlighted. The sidebar on the right contains patient information for 'Norx X Copmovt', including MRN 10816180, and a list of diagnoses such as 'Acute non-recurrent streptococcal tonsillitis' and 'Sore throat'. The bottom of the screen shows the 'Session History' and 'Comments' sections.

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5. Click on **Advanced** (top of the Filter Edit screen).
6. Click on the **Add** button.
7. Click on **Properties** in the Rule Editor Property/Rule Select box.
8. Double click on **Charge Session**.
9. Scroll down and double click **Default Department**. (Default POS or Billing Provider can also be used to filter WQ's by following the same steps used to filter by Default Department)



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10. Click on the Operator: = button.
11. Click on the Value: **Add** button, the record select box opens.

Filter Edit

Standard **Advanced**

Select from rules currently associated with this workqueue:

Rule	Type
<input type="checkbox"/> 12-SELF-PAY AMOUNT IS GREATER THAN CHARGE AMOUNT	Error
<input type="checkbox"/> 20-PROCEDURE CANNOT BE USED WITH CERTAIN DIAGNOSES	Error
<input type="checkbox"/> 28-POS MUST BE ENTERED	Error
<input type="checkbox"/> 37-PROCEDURE SERVICE DATE MUST BE AFTER REFERRAL START DATE	Error

Select existing rules that the entries must satisfy:

1

Set additional filters on the entries to be shown:

Evaluation logic: **And** Or Custom:

Search for new item + Add Show Parameters

Operator: [!] [?] = [<>]

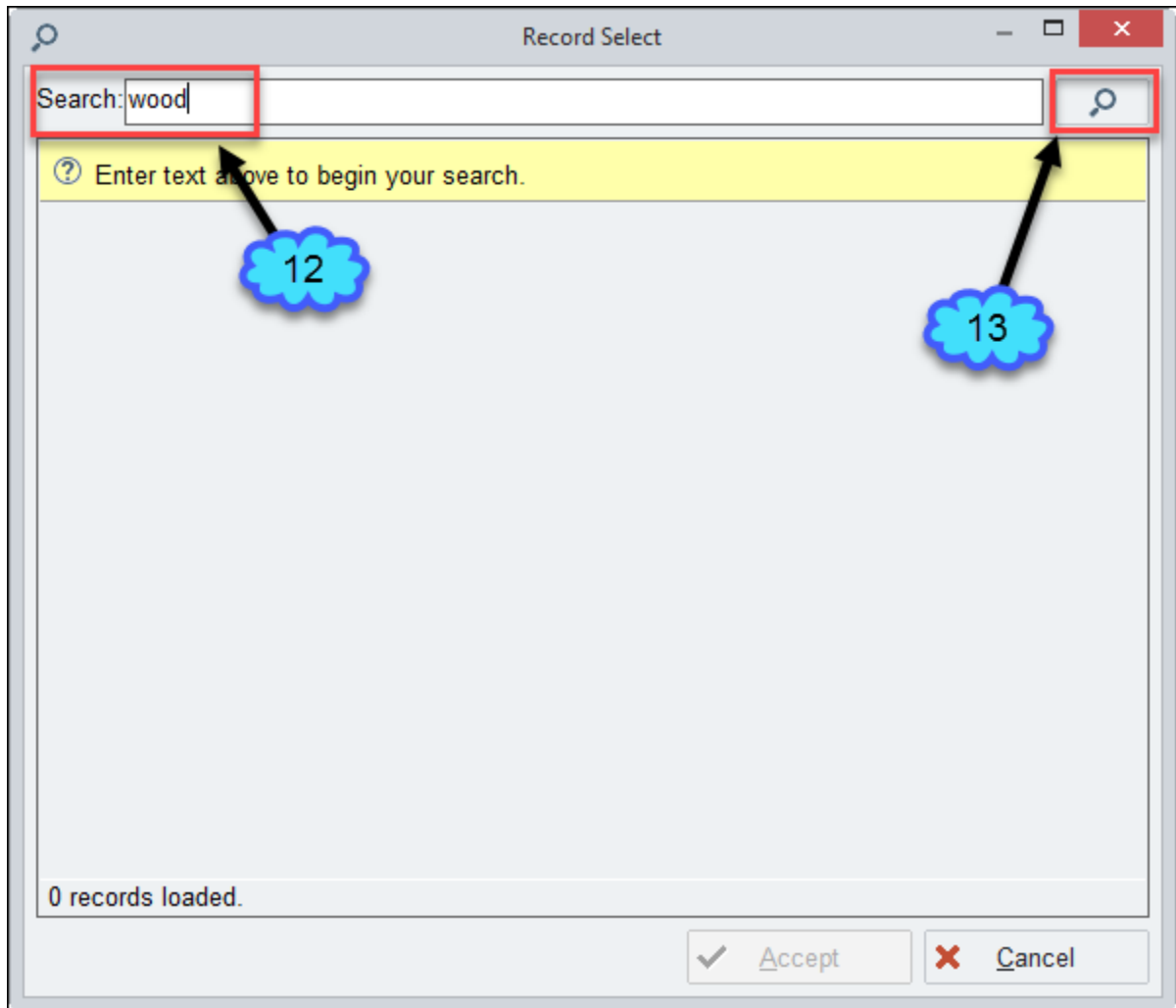
Value: [] + Add

Property or Rule: []

Clear ☐ Always open in filtered view Accept Cancel

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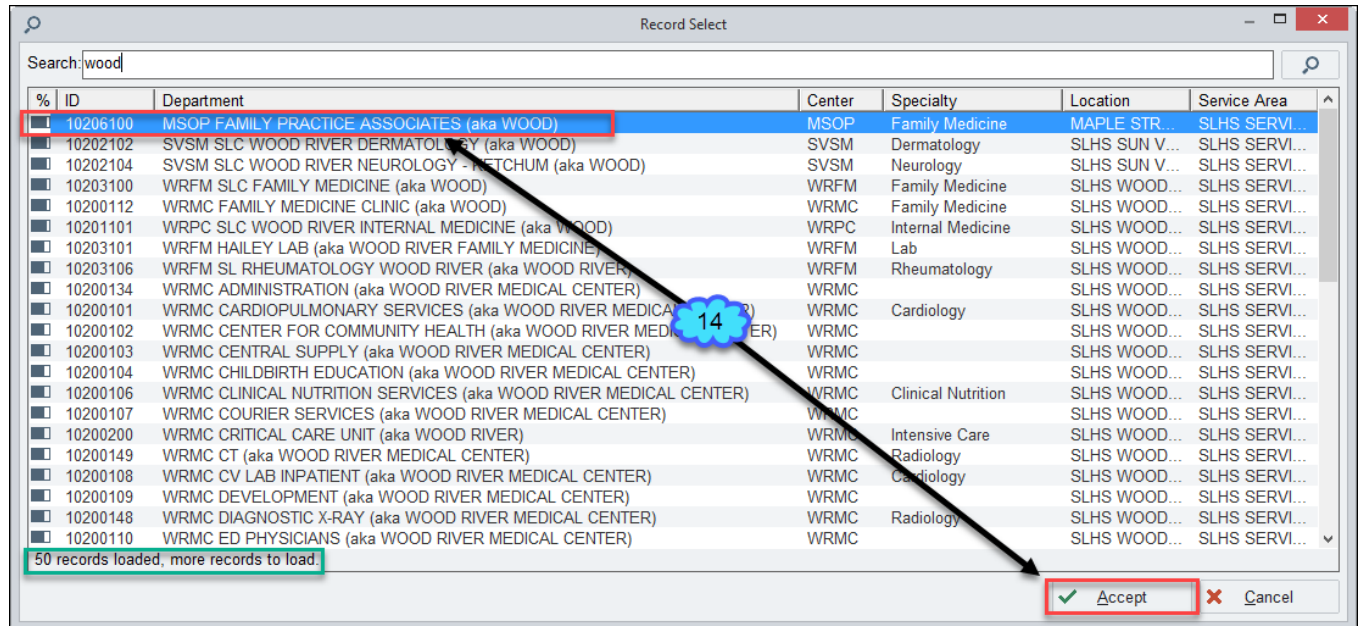
12. Type the first four letters of the department in the **Search:** field of the Record Select screen
13. Click on the **magnifying glass**.



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- Double click on the department or click on the department and then click on **Accept** in the Record Select screen.

(If you cannot find the department scroll down. At the bottom of the screen you can see that there are more records to load. If you continue to scroll all the records will load.)



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15. To add more than one department click on the Value: **Add** button “repeat [steps](#) 11-14 to add additional departments”.
16. Once all departments have been added click on **Accept**. (If the Accept button is not visible scroll down until you can see it.)

The screenshot shows the 'Filter Edit' dialog box with the 'Advanced' tab selected. The 'Standard' tab is also visible. The 'Select from rules currently associated with this workqueue:' section contains a list of rules with checkboxes. The 'Select existing rules that the entries must satisfy:' section contains a list with the number '1'. The 'Set additional filters on the entries to be shown:' section includes an 'Evaluation logic' dropdown set to 'And', a 'Search for new item' field, and a '+ Add' button. A red box highlights the '+ Add' button, with a blue cloud containing the number '15' pointing to it. Below the '+ Add' button, a list of departments is shown, each with a checkmark and a name in brackets: 'MSOP FAMILY PRACTICE ASSOCIATES (aka WOOD) [10206100]' and 'WRMC FAMILY MEDICINE CLINIC (aka WOOD) [10200112]'. A red box highlights the 'Accept' button, with a blue cloud containing the number '16' pointing to it. The 'Accept' button is located at the bottom right of the dialog box. The 'Cancel' button is located at the bottom right of the dialog box. The 'Clear' button is located at the bottom left of the dialog box. The 'Always open in filtered view' checkbox is located at the bottom left of the dialog box.

Rule	Type
<input type="checkbox"/> 12-SELF-PAY AMOUNT IS GREATER THAN CHARGE AMOUNT	Error
<input type="checkbox"/> 20-PROCEDURE CANNOT BE USED WITH CERTAIN DIAGNOSES	Error
<input type="checkbox"/> 28-POS MUST BE ENTERED	Error
<input type="checkbox"/> 37-PROCEDURE SERVICE DATE MUST BE AFTER REFERRAL START DATE	Error

1

Set additional filters on the entries to be shown:

Evaluation logic: **And** Or Custom:

Search for new item + Add Show Parameter Values

Value: + Add

- ✓ MSOP FAMILY PRACTICE ASSOCIATES (aka WOOD) [10206100]
- ✓ WRMC FAMILY MEDICINE CLINIC (aka WOOD) [10200112]

Property or Rule:

Accept Cancel

Clear ☐ Always open in filtered view Accept Cancel

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17. Check “Always open in filtered view” to set this filter as your default.

18. Click on **Accept**.

The screenshot shows the 'Filter Edit' dialog box with the 'Advanced' tab selected. The 'Standard' tab is also visible. The 'Select from rules currently associated with this workqueue:' section lists several rules, all of which are unchecked. The 'Select existing rules that the entries must satisfy:' section shows a list with the number '1'. The 'Set additional filters on the entries to be shown:' section shows the 'Evaluation logic' set to 'And'. Below this, there is a search bar and a table with one row: '1 Charge Session » Default Department' with an operator '=' and a value 'MSOP FAMILY PRACTICE ASSOCIATES [10206100] WRCM FAMILY MEDICINE CLINIC [10200112]'. At the bottom, the 'Always open in filtered view' checkbox is checked and highlighted with a red box, with an arrow pointing to it from a blue cloud labeled '17'. The 'Accept' button is also highlighted with a red box, with an arrow pointing to it from a blue cloud labeled '18'.

Rule	Type
<input type="checkbox"/> 12-SELF-PAY AMOUNT IS GREATER THAN CHARGE AMOUNT	Error
<input type="checkbox"/> 20-PROCEDURE CANNOT BE USED WITH CERTAIN DIAGNOSES	Error
<input type="checkbox"/> 28-POS MUST BE ENTERED	Error
<input type="checkbox"/> 37-PROCEDURE SERVICE DATE MUST BE AFTER REFERRAL START DATE	Error

#	Property/Rule	Operator	Value (or Property)
1	Charge Session » Default Department	=	MSOP FAMILY PRACTICE ASSOCIATES [10206100] WRCM FAMILY MEDICINE CLINIC [10200112]

Go back to the document that you hyperlinked from.

PROCEDURE FOR FILTERING PB CHARGE REVIEW WORKQUEUES

HOW TO EDIT A FILTER:

1. Click on the drop down arrow next to **Show All**.
2. Click on **Set/Edit Filter**.

The screenshot displays the Epic Charge Review interface for patient BOABZMXISK, ALLY X. The main window shows a list of charges with columns for WQ Score, Svc Date, Svc Description, Count, Coverage, Provider, Location, Department, and Sess Amount. A red box highlights the 'Show All' dropdown menu, and a blue circle highlights the 'Set/Edit Filter' option. The sidebar on the right contains patient information, including the name 'Ally X Boabzmxisk', MRN '3114798', and a list of diagnoses and vital signs.

WQ Score	Svc Date	Svc Description	Count	Coverage	Provider	Location	Department	Sess Amount
60	05/31/2017	BOABZMXISK, ALLY X	1	BLUE CROSS I	WADE, CAR	MAPLE STREET OFF	MSOP FAMILY PRACTI	134.00
60	05/30/2017	BYRKO, YVON	1	COMMERCIAL...	WADE, CAR	MAPLE STREET OFF	MSOP FAMILY PRACTI	134.00
60	05/30/2017	DECUJ, JASB X	1	COMMERCIAL...	WADE, CAR	MAPLE STREET OFF	MSOP FAMILY PRACTI	134.00
60	05/31/2017	DELVOV, MIL	1	UNITED HEALT...	WADE, CAR	MAPLE STREET OFF	MSOP FAMILY PRACTI	96.00
60	04/29/2017	EGUQA, ADES	1	COMMERCIAL...	WADE, CAR	MAPLE STREET OFF	MSOP FAMILY PRACTI	134.00
60	05/25/2017	GRELJOO, ST	1	MEDICARE-ME	LEVIN, DONA	MAPLE STREET OFF	MSOP FAMILY PRACTI	146.00
60	05/30/2017	HANADL, CON	1	MEDICARE-ME	LEVIN, DONA	MAPLE STREET OFF	MSOP FAMILY PRACTI	194.00
60	03/01/2017	HOOTWZG, CL	1	MEDICAID IDA	WADE, CAR	MAPLE STREET OFF	MSOP FAMILY PRACTI	134.00
60	05/31/2017	HOUWF, STE	1	BLUE CROSS I	WADE, CAR	MAPLE STREET OFF	MSOP FAMILY PRACTI	134.00
60	05/25/2017	JAMZDOX, CH	1	BLUE CROSS I	LEVIN, DONA	MAPLE STREET OFF	MSOP FAMILY PRACTI	267.27
60	04/29/2017	JARLHPV, N	1	BLUE CROSS I	WADE, CAR	MAPLE STREET OFF	MSOP FAMILY PRACTI	0.00
60	05/31/2017	SIERLY, GLEO	1	REGENE-RE	WADE, CAR	MAPLE STREET OFF	MSOP FAMILY PRACTI	134.00
60	05/04/2017	WIESFA, ANN	1	COMMERCIAL...	LEVIN, DONA	MAPLE STREET OFF	MSOP FAMILY PRACTI	128.00
60	05/30/2017	ZINKTQ, MARV	1	MEDICARE AD	LEVIN, DONA	MAPLE STREET OFF	MSOP FAMILY PRACTI	112.00

Session History

#	Date	User	Activity
1	05/01/17	2:16 AM	2259-ANDRADE, ... Entry

Comments

User Comment

System Comment

Original Encounter Details

Administrations This Visit

Admin	Action	Dose	Route	Admini
Admin <td>Given</td> <td>1000</td> <td>IntraMUSCULAR</td> <td>By</td>	Given	1000	IntraMUSCULAR	By
05/31/2017	mcg			Zoila Andrad
				CMA

Referring Provider

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3. Click on **Advanced** in the Filter Edit screen.
4. Click on the **Default Department** hyperlink.

The screenshot shows the 'Filter Edit' dialog box. At the top, there are two tabs: 'Standard' and 'Advanced'. The 'Advanced' tab is selected and highlighted with a red box, with a blue cloud containing the number '3' pointing to it. Below the tabs, there is a section titled 'Select from rules currently associated with this workqueue:' which contains a list of rules with checkboxes. The rules are:

Rule	Type
<input type="checkbox"/> 12-SELF-PAY AMOUNT IS GREATER THAN CHARGE AMOUNT	Error
<input type="checkbox"/> 20-PROCEDURE CANNOT BE USED WITH CERTAIN DIAGNOSES	Error
<input type="checkbox"/> 28-POS MUST BE ENTERED	Error
<input type="checkbox"/> 37-PROCEDURE SERVICE DATE MUST BE AFTER REFERRAL START DATE	Error

Below this, there is a section titled 'Select existing rules that the entries must satisfy:' with a text box containing the number '1'. Underneath, there is a section titled 'Set additional filters on the entries to be shown:' which includes an 'Evaluation logic' section with 'And', 'Or', and 'Custom' options. Below this is a 'Search for new item' section with a '+ Add' button and a 'Show Parameter Values' button. The main area shows a table with the following data:

#	Property/Rule	Operator	Value (or Property)
1	Charge Session	=	WRMC FAMILY MEDICINE CLINIC [10200112] MSOP FAMILY PRACTICE ASSOCIATES [10206100]

The 'Default Department' link in the first row of the table is highlighted with a red box, with a blue cloud containing the number '4' pointing to it. At the bottom of the dialog, there are buttons for 'Clear', 'Accept', and 'Cancel', along with a checkbox labeled 'Always open in filtered view' which is checked.

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- Click on the Value: **Add** button (you may need to scroll down to see this button)
- Click in the **Search:** field - enter the first 4 letters of the department or specialty.
- Click on the **magnifying glass**.

The screenshot shows the Epic Charge Review interface for a patient named BOABZMXISKALLY X. The 'Charge Review' window is open, displaying a list of charge sessions. A 'Record Select' dialog box is open, showing a search for 'wood'. The 'Add' button is highlighted in the 'Value' field. A magnifying glass icon is also visible in the search field.

- Double click on the department.

The screenshot shows the 'Record Select' dialog box with a search for 'wood'. The list of results is displayed, showing various departments and their associated services. The first row, '10206100 MSOP FAMILY PRACTICE ASSOCIATES (aka WOOD RIVER MEDICAL CENTER)', is highlighted. A magnifying glass icon is visible in the search field.

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9. Scroll down to verify the department(s) was added and click **Accept** with the check mark.
10. Click **Accept**.

The screenshot shows the 'Filter Edit' dialog box with the 'Advanced' tab selected. The 'Standard' tab is also visible. The 'Select from rules currently associated with this workqueue:' section contains a list of rules with checkboxes and a 'Type' column. The 'Select existing rules that the entries must satisfy:' section contains a list with the number '1'. The 'Set additional filters on the entries to be shown:' section includes an 'Evaluation logic' dropdown set to 'And', a 'Search for new item' field, an 'Add' button, and a 'Show Parameter Values' button. Below these are two purple boxes representing selected items: 'WRFM SLC FAMILY MEDICINE - HAILEY (aka FAMILY) [10203100]' and 'ELTM SLC FAMILY MED [10613001]'. A blue cloud with the number '9' points to the 'Accept' button in the bottom right of the dialog. A blue cloud with the number '10' points to the 'Accept' button in the bottom right of the 'Set additional filters' section. The 'Accept' button in the bottom right of the dialog is highlighted with a red box.

Rule	Type
<input type="checkbox"/> 12-SELF-PAY AMOUNT IS GREATER THAN CHARGE AMOUNT	Error
<input type="checkbox"/> 20-PROCEDURE CANNOT BE USED WITH CERTAIN DIAGNOSES	Error
<input type="checkbox"/> 28-POS MUST BE ENTERED	Error
<input type="checkbox"/> 37-PROCEDURE SERVICE DATE MUST BE AFTER REFERRAL START DATE	Error

1

WRFM SLC FAMILY MEDICINE - HAILEY (aka FAMILY) [10203100]
ELTM SLC FAMILY MED [10613001]

Property or Rule: _____ or _____

Accept Cancel

Clear ☐ Always open in filtered view Accept Cancel

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HOW TO REMOVE A DEPARTMENT FROM THE DEFAULT LIST.

1. After getting to the Filter Edit Advanced screen go to the **Value:** click on the **Default Department** hyperlink.

The screenshot shows the 'Filter Edit' window with the 'Advanced' tab selected. It contains three main sections: 'Select from rules currently associated with this workqueue:', 'Select existing rules that the entries must satisfy:', and 'Set additional filters on the entries to be shown:'. The third section is expanded, showing a table with one filter rule. The 'Property/Rule' column contains 'Charge Session »' and a red box highlights the 'Default Department' link. A blue cloud icon with the number '1' points to this link. The 'Operator' column shows '=', and the 'Value (or Property)' column lists three departments: 'WRMC FAMILY MEDICINE CLINIC [10200112]', 'MSOP FAMILY PRACTICE ASSOCIATES [10206100]', and 'WRFM HAILEY LAB [10203101]'. At the bottom, there are buttons for 'Clear', 'Accept', and 'Cancel', along with a checkbox for 'Always open in filtered view'.

Filter Edit

Standard Advanced

Select from rules currently associated with this workqueue:

Rule	Type
<input type="checkbox"/> 12-SELF-PAY AMOUNT IS GREATER THAN CHARGE AMOUNT	Error
<input type="checkbox"/> 20-PROCEDURE CANNOT BE USED WITH CERTAIN DIAGNOSES	Error
<input type="checkbox"/> 28-POS MUST BE ENTERED	Error
<input type="checkbox"/> 37-PROCEDURE SERVICE DATE MUST BE AFTER REFERRAL START DATE	Error

Select existing rules that the entries must satisfy:

1

Set additional filters on the entries to be shown:

Evaluation logic: And Or Custom:

+ Add Show Parameter Values

#	Property/Rule	Operator	Value (or Property)
1	Charge Session » Default Department	=	WRMC FAMILY MEDICINE CLINIC [10200112] MSOP FAMILY PRACTICE ASSOCIATES [10206100] WRFM HAILEY LAB [10203101]

Clear ☒ Always open in filtered view Accept Cancel

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2. Scroll down to the Value: section all the departments are listed in the filter.
3. Click on the **check mark** next to the department name to be removed, this will remove the check mark.

The screenshot shows the 'Filter Edit' dialog box with the 'Advanced' tab selected. The 'Standard' tab is also visible. The 'Advanced' tab has two sections: 'Select from rules currently associated with this workqueue:' and 'Set additional filters on the entries to be shown:'. The first section contains a list of rules with checkboxes and a 'Type' column. The second section contains a list of departments with checkboxes and a 'Value' column. The 'Value' column has a red box around it, and a blue cloud with the number '2' points to it. The 'Type' column has a red box around it, and a blue cloud with the number '3' points to it. The 'Value' column has a red box around it, and a blue cloud with the number '2' points to it. The 'Type' column has a red box around it, and a blue cloud with the number '3' points to it.

Rule	Type
<input type="checkbox"/> 12-SELF-PAY AMOUNT IS GREATER THAN CHARGE AMOUNT	Error
<input type="checkbox"/> 20-PROCEDURE CANNOT BE USED WITH CERTAIN DIAGNOSES	Error
<input type="checkbox"/> 28-POS MUST BE ENTERED	Error
<input type="checkbox"/> 37-PROCEDURE SERVICE DATE MUST BE AFTER REFERRAL START DATE	Error

Select existing rules that the entries must satisfy:

1

Set additional filters on the entries to be shown:

Evaluation logic: **And** Or Custom:

Search for new item + Add Show Parameter Values

Value: + Add

<input checked="" type="checkbox"/> WRMC FAMILY MEDICINE CLINIC [10200112]
<input checked="" type="checkbox"/> MSOP FAMILY PRACTICE ASSOCIATES [10206100]
<input checked="" type="checkbox"/> WRFM HAILEY LAB [10203101]

Property or or

Clear ☒ Always open in filtered view Accept Cancel

PROCEDURE FOR FILTERING PB CHARGE REVIEW WORKQUEUES

4. Scroll down and click on **Accept**.
5. Click **Accept**.

Filter Edit

Standard **Advanced**

Select from rules currently associated with this workqueue:

Rule	Type
<input type="checkbox"/> 12-SELF-PAY AMOUNT IS GREATER THAN CHARGE AMOUNT	Error
<input type="checkbox"/> 20-PROCEDURE CANNOT BE USED WITH CERTAIN DIAGNOSES	Error
<input type="checkbox"/> 28-POS MUST BE ENTERED	Error
<input type="checkbox"/> 37-PROCEDURE SERVICE DATE MUST BE AFTER REFERRAL START DATE	Error

Select existing rules that the entries must satisfy:

1

Set additional filters on the entries to be shown:

Evaluation logic: **And** Or Custom:

Search for new item **+ Add** Show Parameter Values

Property or Rule: or

☒ WRFM HAILEY LAB [10203101]

☒ **Accept** ☐ **Cancel**

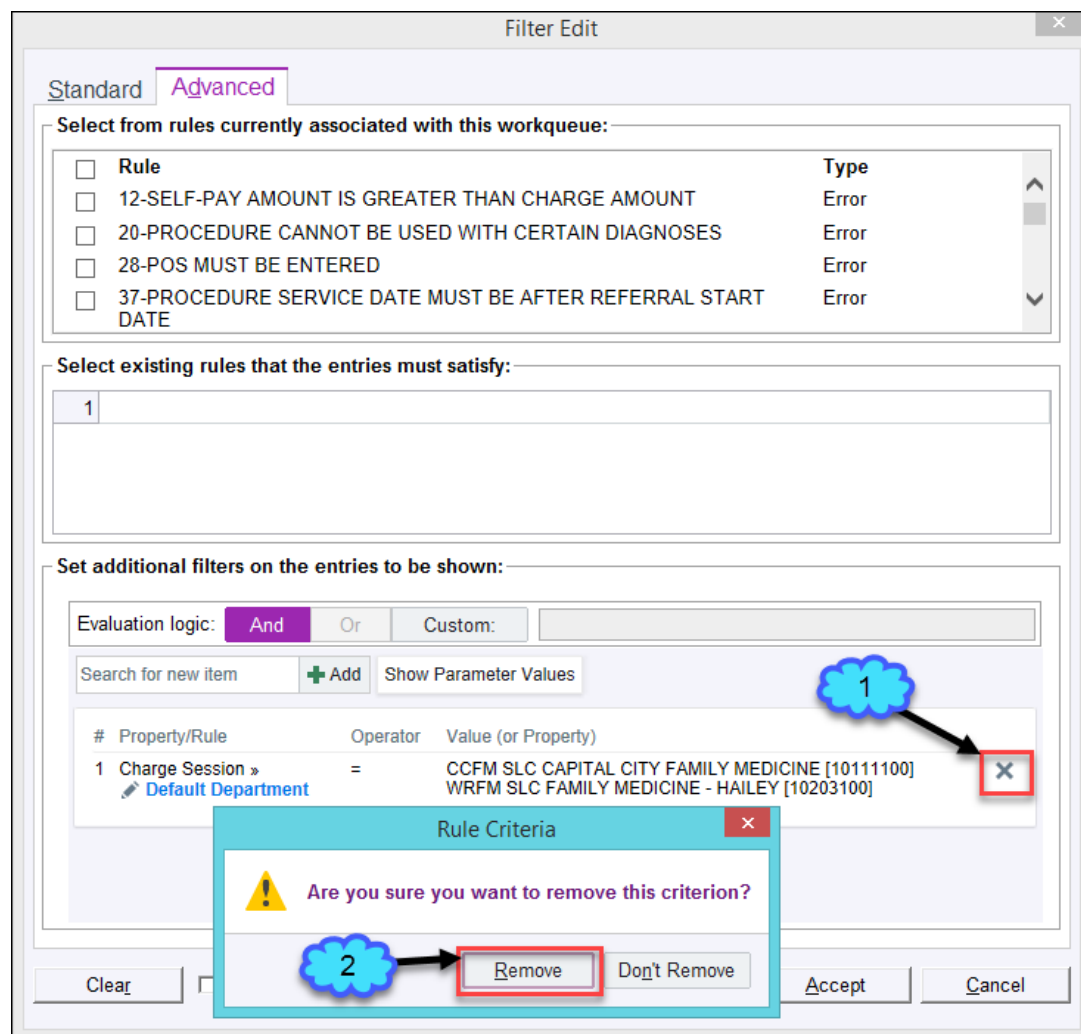
5

☒ Always open in filtered view

PROCEDURE FOR FILTERING PB CHARGE REVIEW WORKQUEUES

HOW TO DELETE ALL DEFAULT DEPARTMENTS.

1. After getting to the Filter Edit Advanced screen go to the list filter list click on the X on the right side of the list.
2. Click on **Remove**.



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3. Click on **Accept**.

Filter Edit

Standard **Advanced**

Select from rules currently associated with this workqueue:

<input type="checkbox"/> Rule	Type
<input type="checkbox"/> 12-SELF-PAY AMOUNT IS GREATER THAN CHARGE AMOUNT	Error
<input type="checkbox"/> 20-PROCEDURE CANNOT BE USED WITH CERTAIN DIAGNOSES	Error
<input type="checkbox"/> 28-POS MUST BE ENTERED	Error
<input type="checkbox"/> 37-PROCEDURE SERVICE DATE MUST BE AFTER REFERRAL START DATE	Error

Select existing rules that the entries must satisfy:

1

Set additional filters on the entries to be shown:

Evaluation logic: **And** Or Custom:

Search for new item + Add Show Parameter Values

No active Criteria.

Clear ☐ Always open in filtered view **Accept** Cancel

Approved by: Kim Reid, Director for PB Coding

Approved Date: 07/24/17

Owned by: PB Coding

Last Reviewed Date: 02/2018