

This document outlines the required security for accessing the HIM Coding Worklist, explains how to use the worklist, and provides instructions to utilize coding statuses. The HIM Coding Worklist offers a streamlined and effective solution for coding patient accounts. It displays a list of accounts that need to be coded. From this list, accounts can be selected, and the patient chart options will be displayed (e.g., Patient Summary, Diagnosis, and Procedure screens).

HIM Coding Worklist Security

Security setup is necessary for a user to access the HIM Coding Worklist. Users will need the Application rule specified below.

Application Rule

- Health Information Management

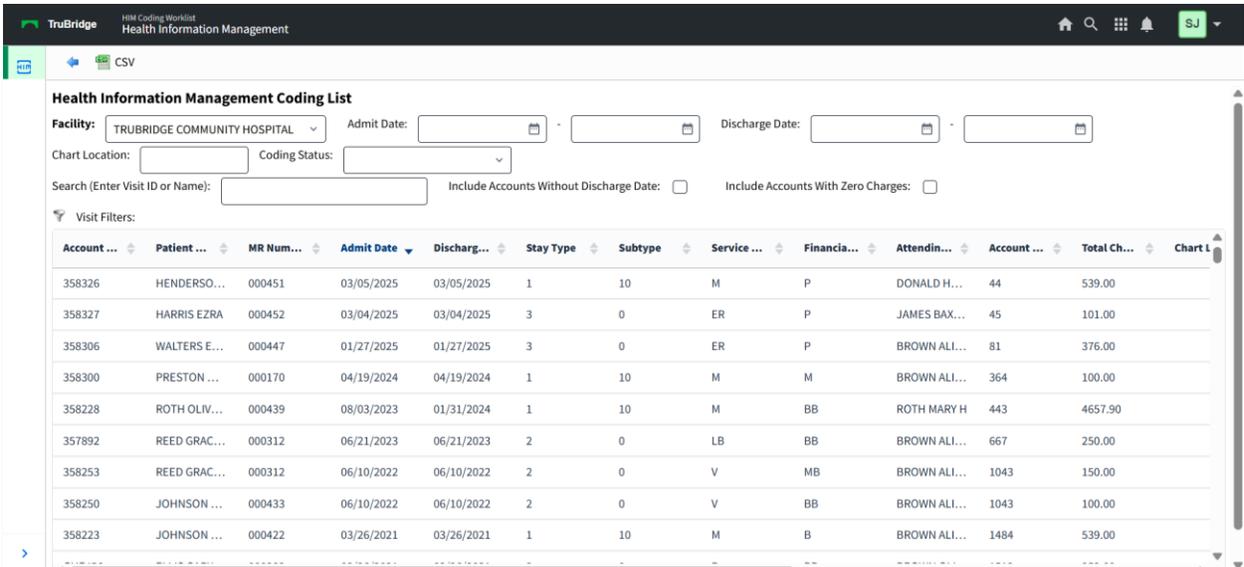
NOTE: Security access for these Applications and Behavior Controls may be granted in System Administration for specific logins or may be given to a group of users in a specific Role.

Using the HIM Coding Worklist

Accounts initially displayed on the worklist will meet the following criteria:

- Have a Discharge Date
- No Contract Code
- No Medical Records Finish Date
- Total Charges Greater than \$0

Select **Web Client > Application Drawer > HIM Coding Worklist**



The screenshot shows the 'Health Information Management Coding List' interface. It includes search filters for Facility (TRUBRIDGE COMMUNITY HOSPITAL), Admit Date, Discharge Date, Chart Location, Coding Status, and a search bar. Below the filters is a table of patient accounts with the following data:

| Account | Patient | MR Num | Admit Date | Discharge | Stay Type | Subtype | Service | Financia | Attendin | Account | Total Ch | Chart |
|---------|--------------|--------|------------|------------|-----------|---------|---------|----------|--------------|---------|----------|-------|
| 358326 | HENDERSO... | 000451 | 03/05/2025 | 03/05/2025 | 1 | 10 | M | P | DONALD H... | 44 | 539.00 | |
| 358327 | HARRIS EZRA | 000452 | 03/04/2025 | 03/04/2025 | 3 | 0 | ER | P | JAMES BAX... | 45 | 101.00 | |
| 358306 | WALTERS E... | 000447 | 01/27/2025 | 01/27/2025 | 3 | 0 | ER | P | BROWN ALL... | 81 | 376.00 | |
| 358300 | PRESTON ... | 000170 | 04/19/2024 | 04/19/2024 | 1 | 10 | M | M | BROWN ALL... | 364 | 100.00 | |
| 358228 | ROTH OLIV... | 000439 | 08/03/2023 | 01/31/2024 | 1 | 10 | M | BB | ROTH MARY H | 443 | 4657.90 | |
| 357892 | REED GRAC... | 000312 | 06/21/2023 | 06/21/2023 | 2 | 0 | LB | BB | BROWN ALL... | 667 | 250.00 | |
| 358253 | REED GRAC... | 000312 | 06/10/2022 | 06/10/2022 | 2 | 0 | V | MB | BROWN ALL... | 1043 | 150.00 | |
| 358250 | JOHNSON ... | 000433 | 06/10/2022 | 06/10/2022 | 2 | 0 | V | BB | BROWN ALL... | 1043 | 100.00 | |
| 358223 | JOHNSON ... | 000422 | 03/26/2021 | 03/26/2021 | 1 | 10 | M | B | BROWN ALL... | 1484 | 539.00 | |

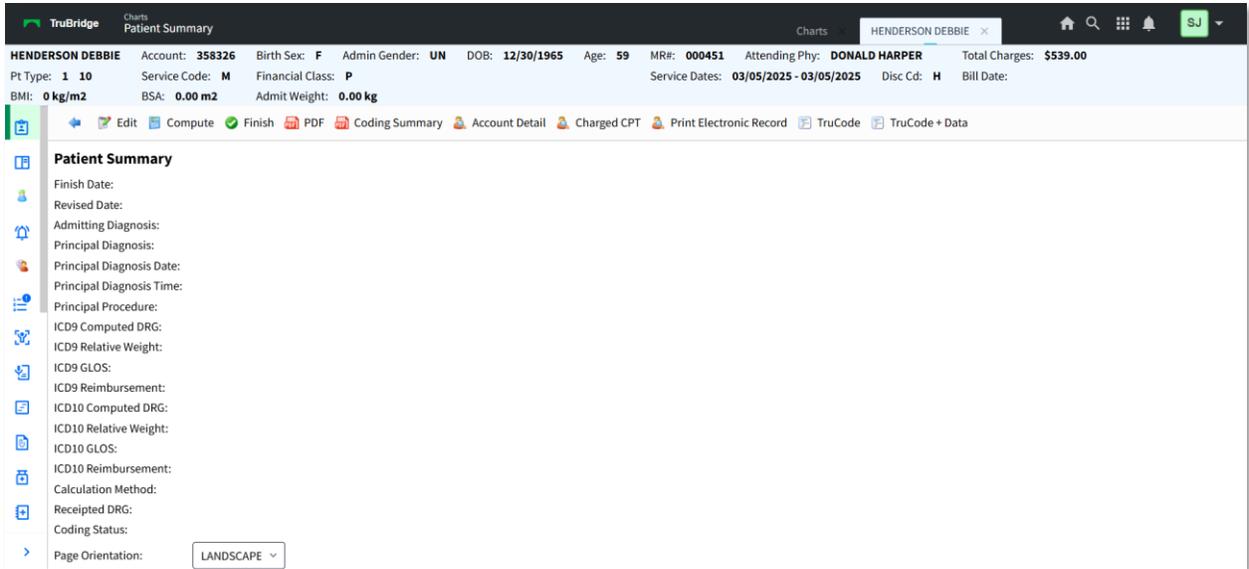
Additional parameters may be entered to filter the displayed accounts. The following options are available:

- **Admit Date:** Displays accounts admitted within a specific date range.
- **Discharge Date:** Displays accounts discharged within a specific date range.
- **Chart Location:** Displays accounts that are currently assigned to a specific Chart Location via the Chart Location application.
- **Coding Status:** Displays accounts assigned to a specific Coding Status. A Coding Status may be entered using the Edit option on the Patient Summary screen. (see details below)
- **Search (Enter Visit ID or Name):** Specific charts may be searched using an account number or patient name.
- **Included Accounts Without Discharge Date:** The worklist will default to only display accounts that have been discharged. Select this option to show accounts that have NOT been discharged.
- **Included Accounts With \$0 Charges:** The worklist will default to only display accounts that have an account balance greater than \$0. Select this option to show accounts that have a \$0 balance.
- **Visit Filters:** This feature uses the Filter Builder tool to create additional filters. For example, filters may be set up to display accounts with a specific Stay Type, Service Code, or Financial Class. The user will need the appropriate Filter Builder security in System Administration to be able to create and add filters to this screen. For more information, please see the additional documentation on [Filter Builder](#).

Once accounts are displayed, the following information will be available for each account.

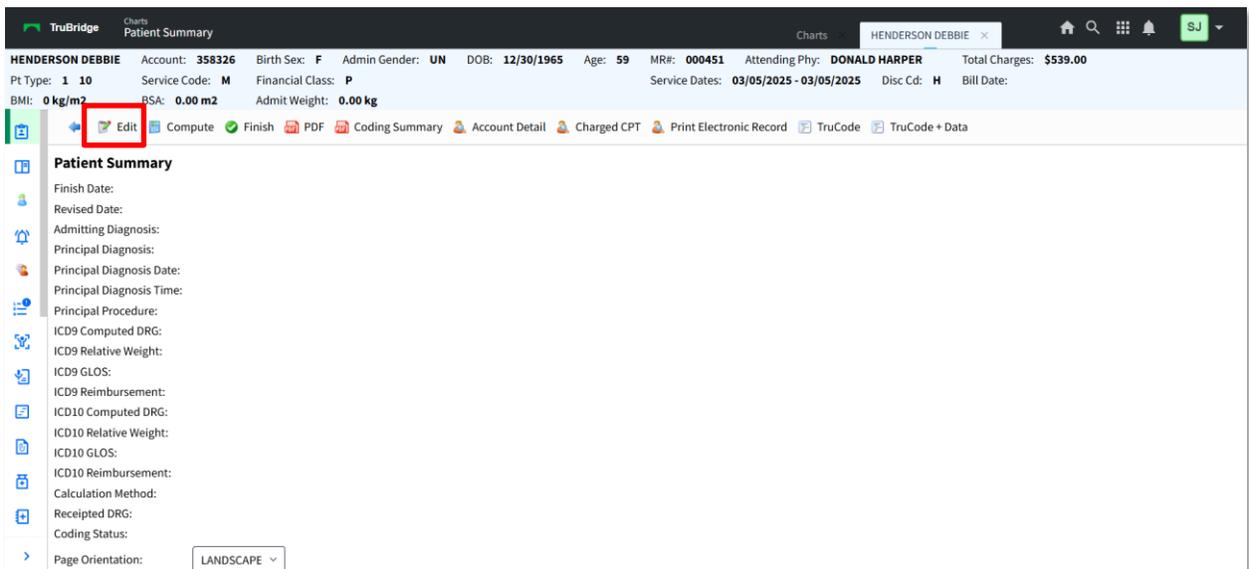
- **Account Number/Patient Name/Medical Record Number/Admit Date/Discharge Date/Stay Type/Subtype/Service Code/Financial Class/Attending Physician:** Pulls from Registration and ADT screen.
- **Account Age:** Pulls the number of days since discharge.
- **Total Charges:** Pulls the total charges from the account detail.
- **Chart Location:** The current location assigned to the patient's chart.
- **Coding Status:** The current coding status assigned to the patient's chart.
- **Coding Status Changed Date:** The date that the current coding status was assigned to the patient's chart.
- **Coding Status Elapsed Time:** The time that the current coding status has been assigned to the patient's chart.

Select a specific account from the worklist to display the patient's Chart.

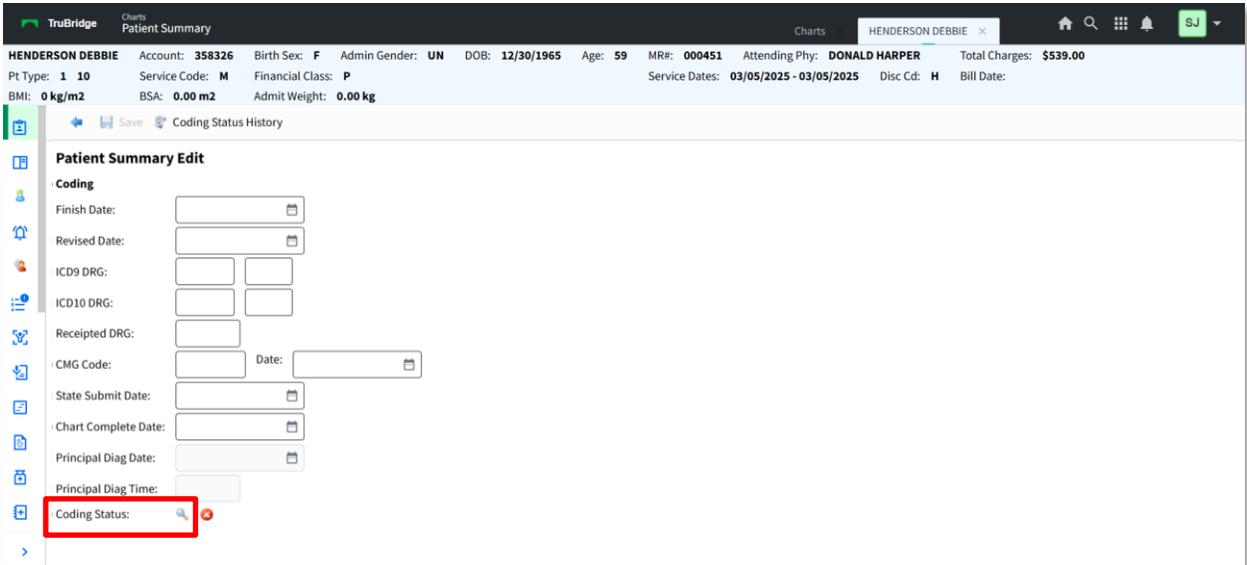


Entering a Coding Status

Select **Web Client > Application Drawer > HIM Coding Worklist > Patient Chart > Patient Summary Screen > Edit**



Use the **magnifying glass** to display a list of coding statuses.



Patient Summary Edit

Coding

Finish Date:

Revised Date:

ICD9 DRG:

ICD10 DRG:

Receipted DRG:

CMG Code: Date:

State Submit Date:

Chart Complete Date:

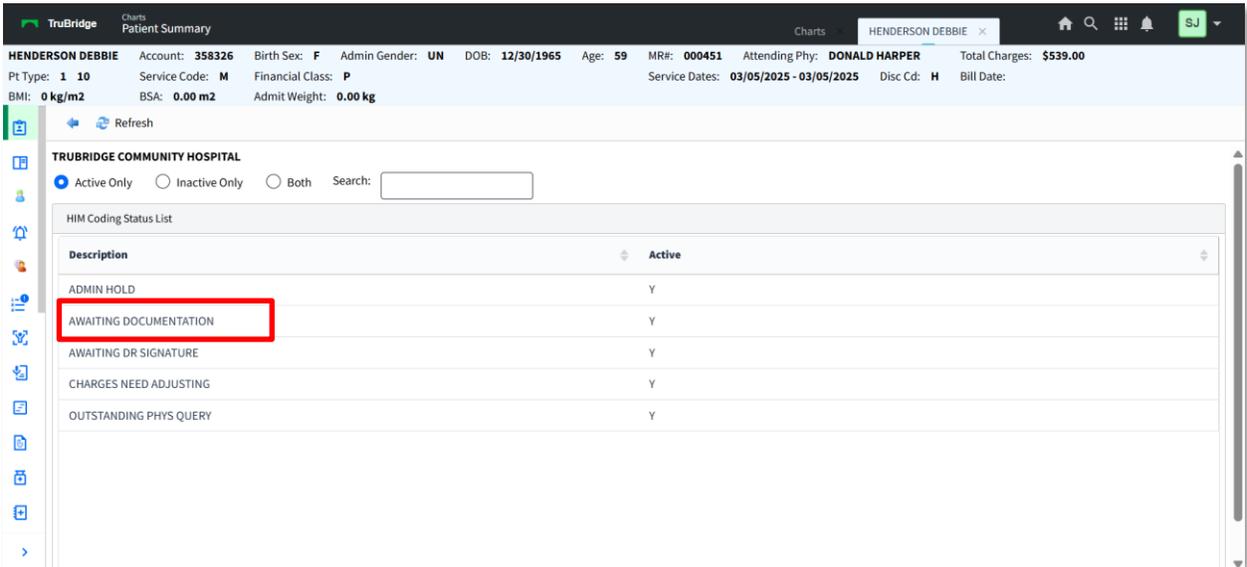
Principal Diag Date:

Principal Diag Time:

Coding Status:

Double-click on the **Coding Status**. Then select **Save** from the Patient Summary Edit screen.

NOTE: The statuses displayed are set up in the Coding Status table. (See details for setup in the [Coding Status Tables Setup](#) section.)



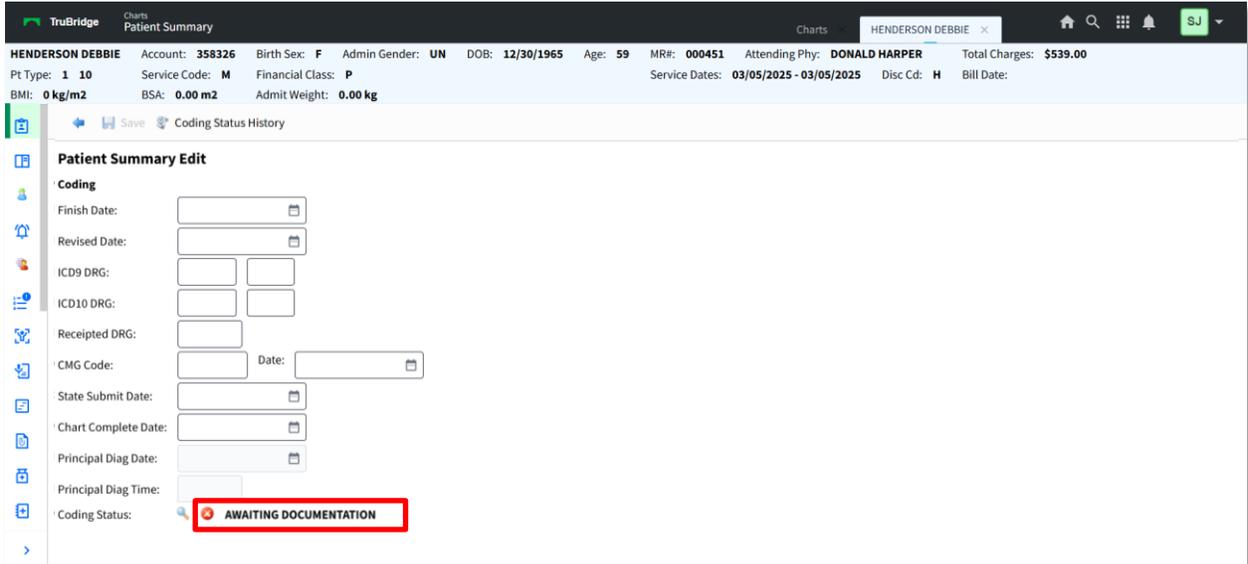
TRUBRIDGE COMMUNITY HOSPITAL

Active Only Inactive Only Both Search:

| Description | Active |
|-------------------------------|--------|
| ADMIN HOLD | Y |
| AWAITING DOCUMENTATION | Y |
| AWAITING DR SIGNATURE | Y |
| CHARGES NEED ADJUSTING | Y |
| OUTSTANDING PHYS QUERY | Y |

Removing a Coding Status

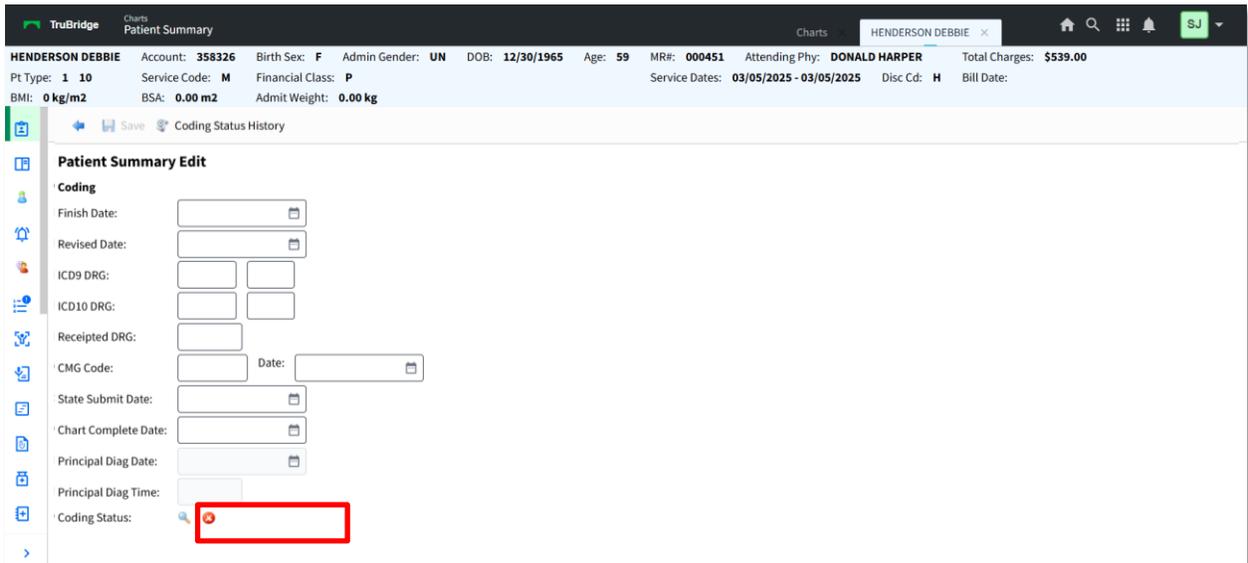
A coding status may be removed from the patient's chart by selecting the **red 'X'**.



The screenshot shows the TruBridge Patient Summary Edit form for patient HENDERSON DEBBIE. The form includes various fields for patient information and coding. The 'Coding Status' field is highlighted with a red box and contains the text 'AWAITING DOCUMENTATION' with a red 'X' icon next to it.

| Field | Value |
|-----------------|-------------------------|
| Account | 358326 |
| Birth Sex | F |
| Admin Gender | UN |
| DOB | 12/30/1965 |
| Age | 59 |
| MR# | 000451 |
| Attending Phy | DONALD HARPER |
| Total Charges | \$539.00 |
| Service Code | M |
| Financial Class | P |
| Service Dates | 03/05/2025 - 03/05/2025 |
| Disc Cd | H |
| Bill Date | |
| BMI | 0 kg/m2 |
| BSA | 0.00 m2 |
| Admit Weight | 0.00 kg |

Once the red 'X' is selected, the previously listed coding status will be removed from the screen.



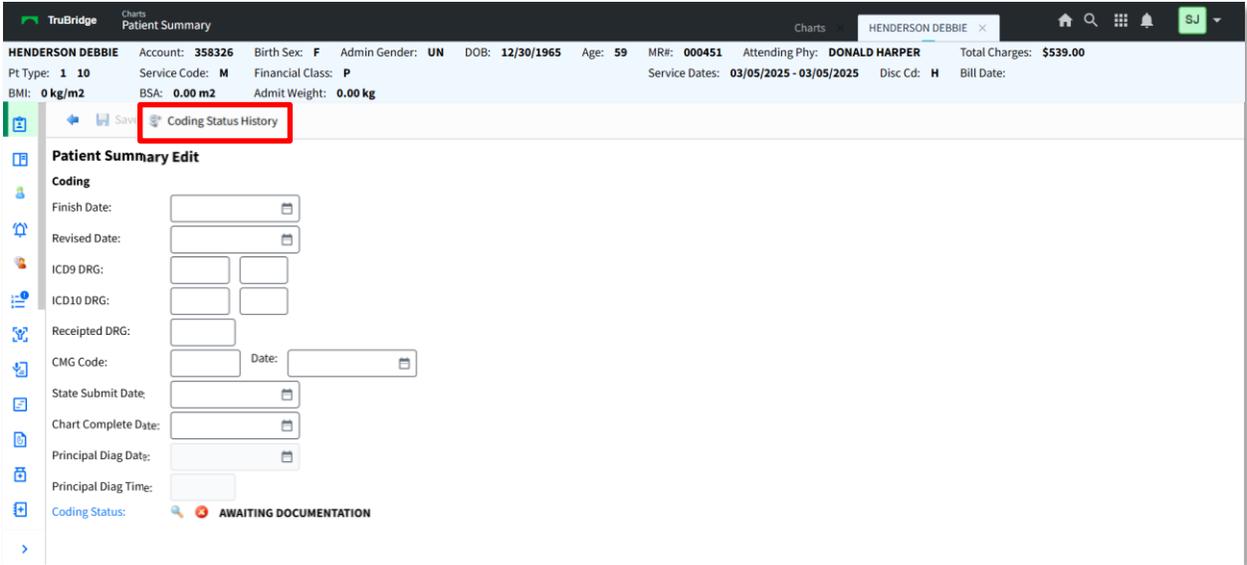
The screenshot shows the TruBridge Patient Summary Edit form for patient HENDERSON DEBBIE. The 'Coding Status' field is now empty, and the red 'X' icon is highlighted with a red box, indicating that the coding status has been removed.

| Field | Value |
|-----------------|-------------------------|
| Account | 358326 |
| Birth Sex | F |
| Admin Gender | UN |
| DOB | 12/30/1965 |
| Age | 59 |
| MR# | 000451 |
| Attending Phy | DONALD HARPER |
| Total Charges | \$539.00 |
| Service Code | M |
| Financial Class | P |
| Service Dates | 03/05/2025 - 03/05/2025 |
| Disc Cd | H |
| Bill Date | |
| BMI | 0 kg/m2 |
| BSA | 0.00 m2 |
| Admit Weight | 0.00 kg |

Coding Status History

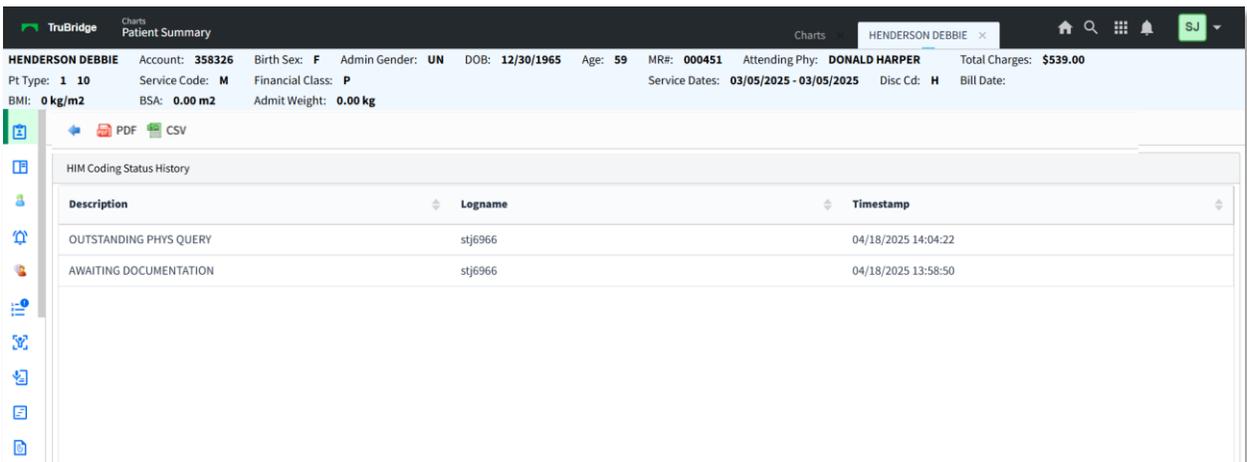
Coding Status History will be updated every time the coding status is changed. To access the History, from the Patient Summary Screen select **Edit** and then select **Coding Status History**.

NOTE: The words "Coding Status" can also be selected to view the coding status history. The text will change to blue when hovering over "Coding Status".



The screenshot shows the 'Patient Summary Edit' section of the TruBridge interface. The 'Coding Status' field is currently set to 'AWAITING DOCUMENTATION'. The 'Coding Status History' link is highlighted with a red box.

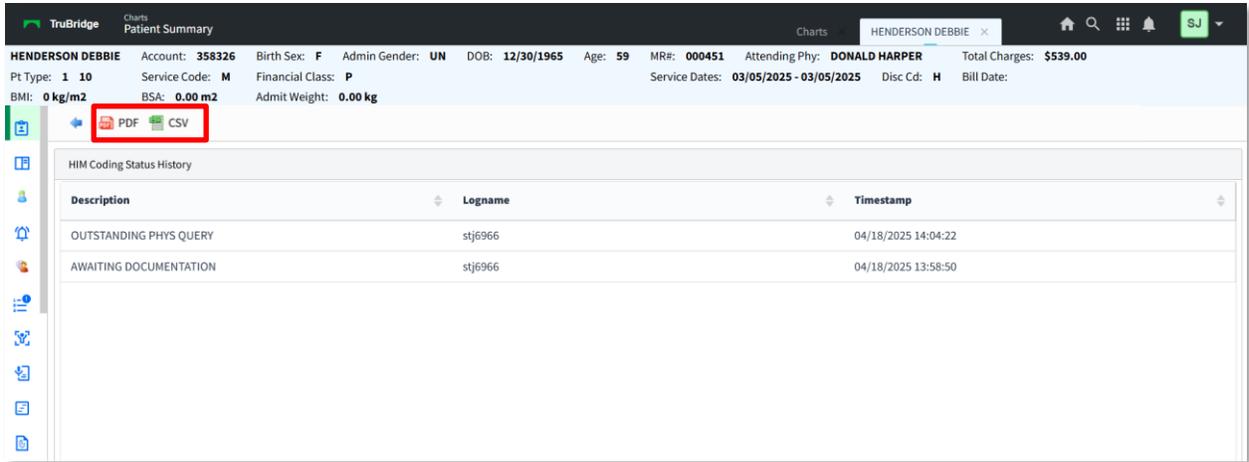
The history of the coding status changes will be displayed. The description of the coding status will show along with the user's login that assigned the status and the date/time the status was assigned.



The screenshot shows the 'HIM Coding Status History' table with the following data:

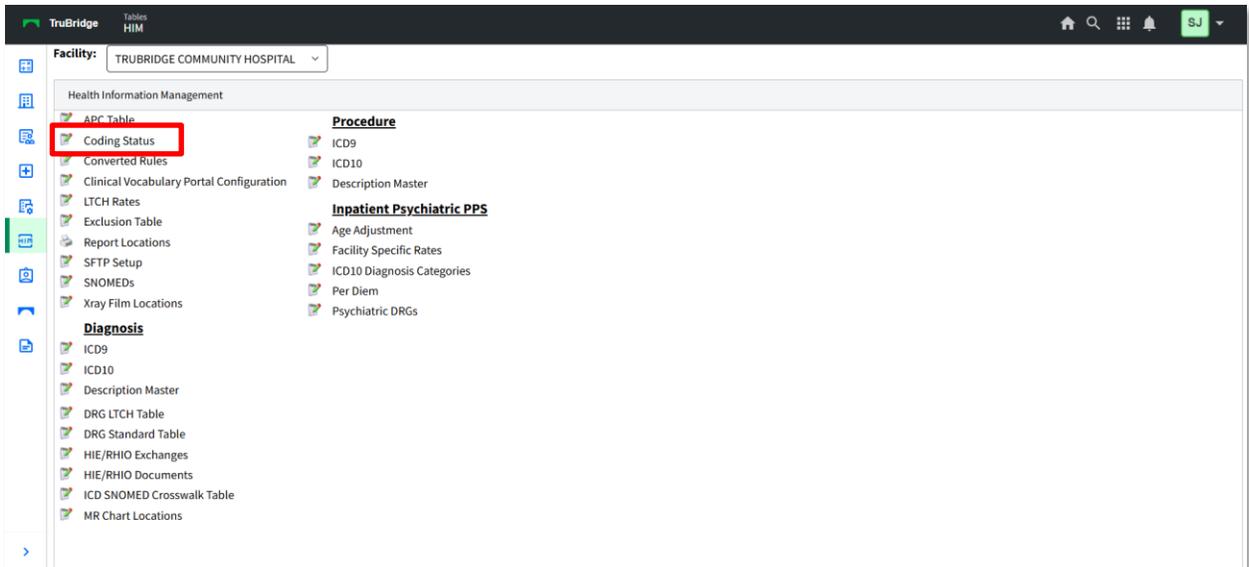
| Description | Logname | Timestamp |
|------------------------|---------|---------------------|
| OUTSTANDING PHYS QUERY | stj6966 | 04/18/2025 14:04:22 |
| AWAITING DOCUMENTATION | stj6966 | 04/18/2025 13:58:50 |

The **PDF** and **CSV** options can be selected to export the HIM Coding Status History list for the patient.

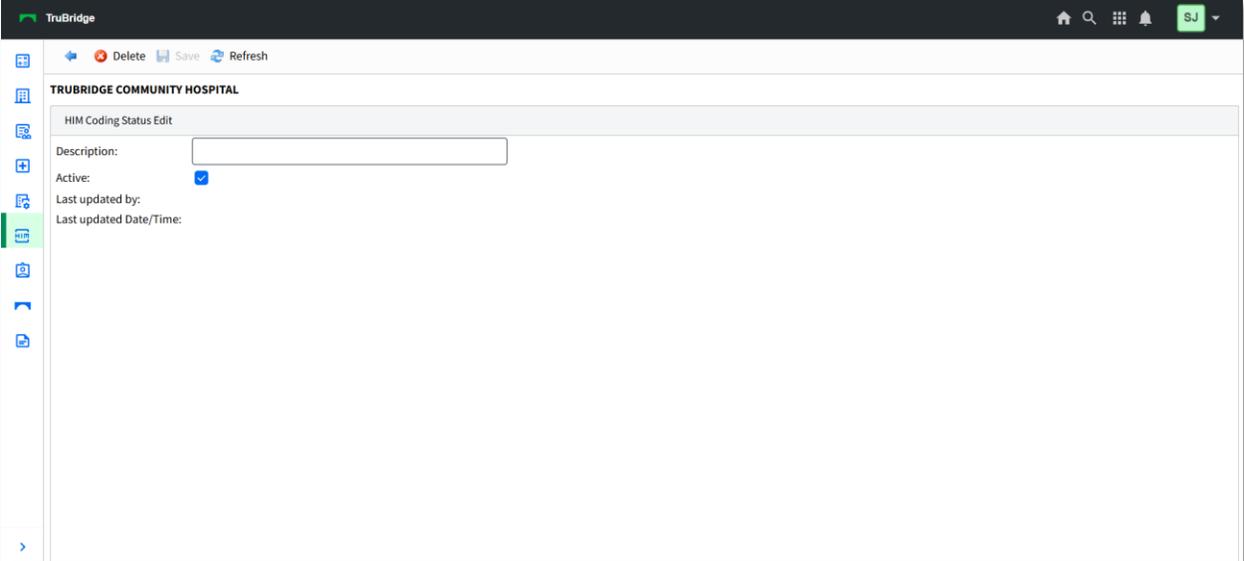


Coding Status Table Setup

The coding statuses that are displayed in the HIM Coding Status List will pull from the Coding Status table. Select **Web Client > Application Drawer > Tables > HIM > Coding Status**.



To add a new Coding Status to the table, select **New**.



- **Description:** Enter the description of the Coding Status.
- **Active:** When selected the status will be active and may be assigned to a patient's chart. When not selected, the status will remain in the Coding Status table under the Inactive list.
- **Last Updated by/Last Updated Date/Time:** Displays the user that last made changes to this coding status, and the date/time the change was made.

Select **Save** after making any changes.

A Delete option is available; this will allow a status that has not been assigned to an account to be deleted. If a status has been assigned to an account, the Active option may be unchecked to deactivate the status and keep it from being used in the future.