

*Productivity  
Assessment  
Tool (PAT)*



Billers  
*Job Aid*

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**1.0 OBJECTIVE**

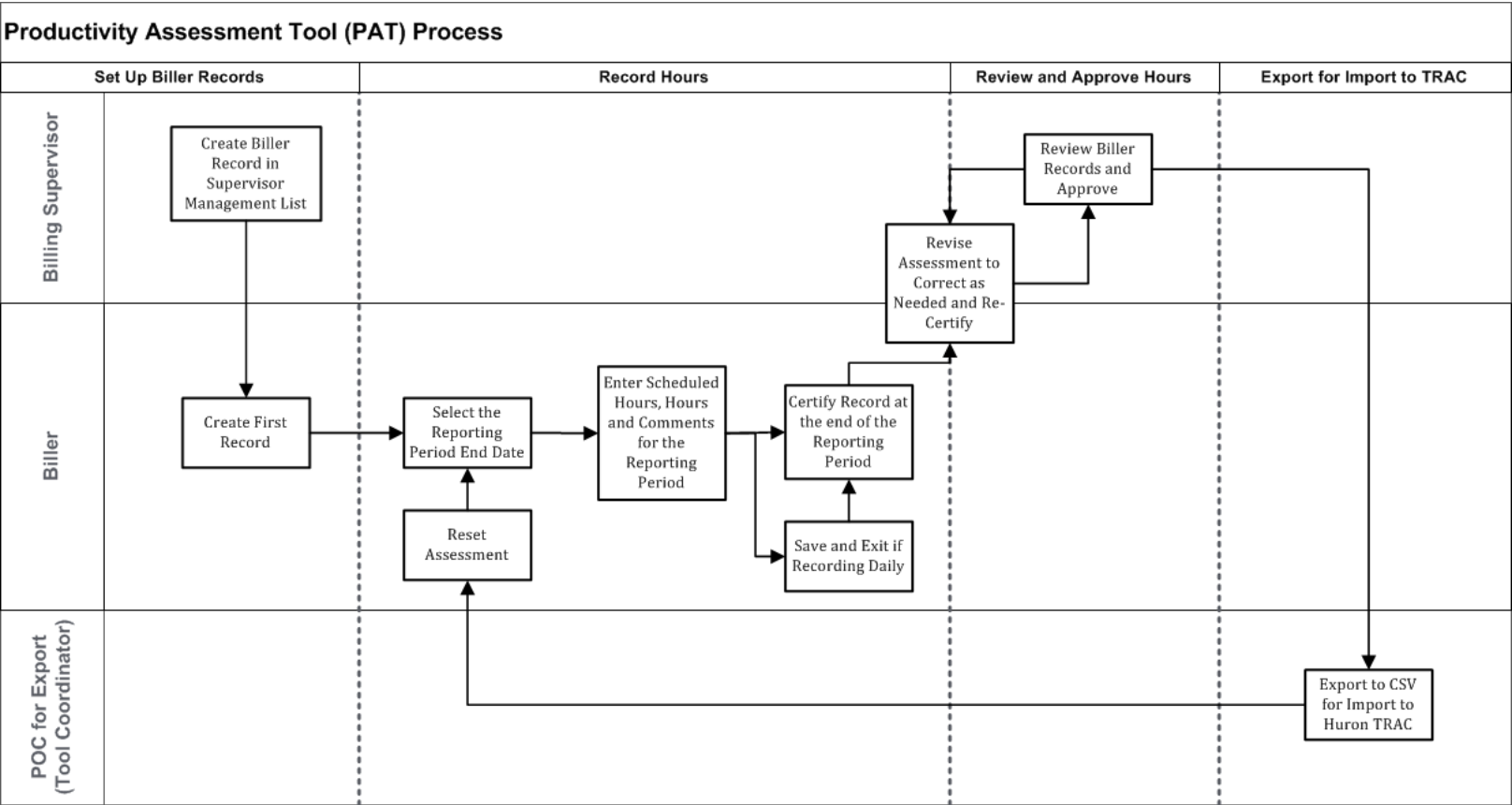
The Productivity Assessment Tool (PAT) provides ability to collect, review and approve biller resource hours that are expended on non-claim generation activities across the Consolidated Patient Account Centers (CPAC). The system will allow input of hours by biller, review and approval of hours by supervisor and export of all data for import into Huron TRAC.

All users must have access to the CPAC Portal, membership to a CPAC’s biller or supervisor security group and access to the PAT system..

**2.0 ROLES**

<b>Type of User</b>	<b>Roles/Responsibilities</b>
CPAC Biller	CPAC Billers with access to PAT will input their hours expended on non-claim generation activities. The billers may input their hours daily, semi-daily or weekly. At the conclusion of each week, the biller will certify their input.
Billing Supervisors	Billing Supervisors will review the data input for verification and approve. Approvals will be done at the conclusion of each week once Billers have certified their record for the reporting week. Supervisors will be able to provide back-up relief in the event of absence for other supervisors. Supervisors will also be responsible for creating and managing the Supervisor Management List.
Export POC	The Export POC is the person responsible for exporting all records for the CPAC and submitting to input to TRAC. The Export POC will need to verify that all records have been certified and approved prior to export.

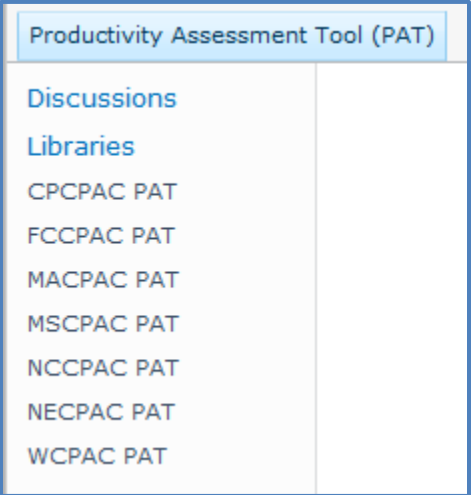
3.0 PAT PROCESS FLOW



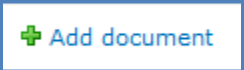
4.0 PAT PROCEDURE

4.1 CPAC Biller – Recording Your Hours

4.1.1 Creating Your First Record

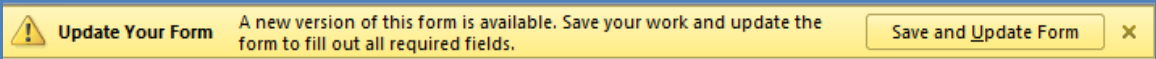


Step 1 From the CPAC Portal, Select the “PAT” Library that corresponds to your CPAC.





Step 2 If you have never previously created a record, select “Add document” from the bottom of the page.


Note: Step 2 will be performed only once, the first time you enter the tool.



Note: If you see the above message, click “Save and Update Form”.

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Billers Name:	Billers Supervisor:	Reporting Period End Date:
Jurrus, Kathryn	Jurrus, Kathryn	<input type="text"/> *
Billers Network ID:	Billers Supervisors Network ID	Scheduled Hours: Select... *
VHALONJURRUK	VHALONJURRUK	Billing Hours: 0
Billers Position:	Billers Start Date:	Billers Code:
Inpatient	7/7/2014	KJXX874

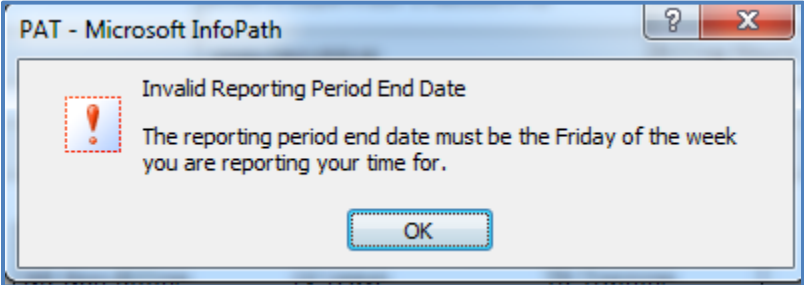
OT: Overtime	TB: Team-Building	SP: Special Project
NB: Non-Billing	LV: Leave	TR: Training
NT: Network Issue	SM: Staff Meeting	UN: Union Duty

Day	OT	TB	SP	NB	LV	TR	NT	SM	UN	Total
										0.00
										0.00
										0.00
										0.00
										0.00
										0.00
										0.00
										0.00
Totals:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Comments:

Note: The Biller’s Name, Biller’s Supervisor, Biller’s Network ID, Biller’s Supervisor’s Network ID, Biller’s Code, Biller’s Position and Biller’s Start Date are automatically populated and cannot be modified by the biller. **See your supervisor for modifications.**

**Step 3** Select the “Reporting Period End Date”. The reporting period end date must be the Friday of the reporting period.



Note: If you select a day that is not a Friday, the system will prompt you to correct the error.

Day	OT	TB	SP	NB	LV	TR	NT	SM	UN	Total
Saturday, September 13, 2014										0.00
Sunday, September 14, 2014										0.00
Monday, September 15, 2014										0.00
Tuesday, September 16, 2014										0.00
Wednesday, September 17, 2014										0.00
Thursday, September 18, 2014										0.00
Friday, September 19, 2014										0.00

Note: After selecting the Reporting Period End Date, the Day column will be automatically populated with all days for that reporting period.

Reporting periods run Saturday – Friday. You are expected to enter your hours and certify no later than Close of Business on the Friday of each reporting week.

**Step 4** Select your “Scheduled Hours” for the week you are reporting on from the Scheduled Hours drop down.

GUIDANCE TO SELECTING SCHEDULED HOURS FOR THE WEEK:

- 35 = Workweek consists of Three 9-hr days + One 8-hr day
- 36 = Workweek consists of Four 9-hr days
- 40 = Workweek consists of Five 8-hr days –OR– Four 10-hr days
- 44 = Workweek consists of Four 9-hr days + One 8-hr day
- 45 = Workweek consists of Five 9-hr days

Note: After selecting the Scheduled Hours, the Billing Hours field will be automatically populated with your selection. The Billing Hours are exported for import to Huron TRAC.

**Step 5** Input your hours spent on non-claim generation activities in the correct columns. Refer to the legend for guidance to the category.

INPUT RULES FOR HOURS:

- Input hours using NO trailing zeros. (i.e., 1, 1.25, 1.5, 1.75)
- Enter Holidays under the LV (Leave) category

**Step 6** Enter any “Comments” relating to your entries.

4.1.2 Inputting Your Hours Daily

**Step 1** If you enter hours daily or semi-daily: Press the “Save & Exit” button at the conclusion of your entry each day.

Name	Report Date	OT	TB	SP	NB	LV	TR	NT	SM	UN
Jurrus_ Kathryn <small>NEW</small>	9/19/2014	0	0	0	0	0	0	0	0	0

**Step 2** To access your record the next day, return to the PAT tool and click on your name.

4.1.3 Certifying Your Hours For The Reporting Period

Step 1 Press the “Certify Assessment” button once you have completed entry of your hours for the reporting period.

Biller's Name:	Biller's Supervisor:	Reporting Period End Date:	
Jurrus, Kathryn	Jurrus, Kathryn	Friday, September 26, 2014	
Biller's Network ID:	Biller's Supervisor's Network ID	Scheduled Hours:	40
VHALONJURRUK	VHALONJURRUK	Billing Hours:	31.5
Biller's Position:	Biller's Start Date:	Biller's Code:	
Inpatient	7/7/2014	KJXX874	

Your time has been certified through 9/26/2014 . If you need to revise the time for this period, please click the "Revise Assessment" button. To enter time for a new period, please click the "Reset Assessment" button. Otherwise, please click the "Save & Exit" button. Thanks ahead.

Revise Assessment    Reset Assessment    Save & Exit

Note: Your record is now available for your supervisor to review and approve.

4.1.4 Modifying Your Certified Hours For The Reporting Period

Step 1 Press the “Revise Assessment” button and the form will open for you to modify. Once complete, re-certify your record as in Step 1 of section 4.2.3.

4.1.5 Resetting Your Input Form For A Future Reporting Period

Step 1 Press the “Reset Assessment” button and a blank form will reload. Follow Steps 3-6 of section 4.2.1.